



## Enhanced Network Solutions Group

Systems Integration • Learning Solutions • CIO Consulting  
Managed Outsourcing • Healthcare Solutions • Security Solutions

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## ACT! 2009: Level 2

SA-AT-ADV-EK Rev 04.10

### 1 day

#### Description

You will customize the ACT! 2009 environment, query and exchange data, work with templates, administer ACT!, and use its Internet features.

#### Prerequisites

- *Windows XP: Basic or Windows Vista: Basic*
- *ACT! 2009: Level 1*

#### Course Outline

##### **Lesson 1: Customizing the ACT! 2009 Environment**

Topic 1A: Specify the Startup Preferences  
Topic 1B: Customize Fields in a Database  
Topic 1C: Customize Layouts  
Topic 1D: Customize the Dashboard  
Topic 1E: Modify Menus and Keyboard Shortcuts  
Topic 1F: Automate Important Tasks

##### **Lesson 2: Creating Queries**

Topic 2A: Perform a Lookup Based on Multiple Criteria  
Topic 2B: Create Advanced Queries

##### **Lesson 3: Administering the ACT! 2009 Database**

Topic 3A: Import Data  
Topic 3B: Export Data  
Topic 3C: Transfer Data to a Pocket PC  
Topic 3D: Manage Data Security  
Topic 3E: Perform Database Maintenance

##### **Lesson 4: Working with Report Templates**

Topic 4A: Generate Reports Using a Standard Report Template  
Topic 4B: Generate Reports Using a Custom Report Template  
Topic 4C: Generate Opportunity Reports

##### **Lesson 5: Working with the ACT! Word Processor**

Topic 5A: Create a Template for Mail Merge  
Topic 5B: Generate Form Letters

##### **Lesson 6: Integrating ACT! 2009 with Email**

Topic 6A: Set Up an Email System in ACT!  
Topic 6B: Send an Email from the Notes Preview Pane  
Topic 6C: Transfer Information from an Email Client into ACT!

##### **Lesson 7: Working with Calendars**

Topic 7A: Integrate the Outlook and ACT! Calendars  
Topic 7B: Set Alarms

##### **Lesson 8: Using the Internet Features in ACT!**

Topic 8A: Create Web Page Attachments  
Topic 8B: Generate Maps and Driving Directions

##### **Appendix A: Synchronize with a Remote Database**

Supplemental Topic Work with a Remote Database



Advanced Infrastructure Solutions  
Information Worker Solutions  
Learning Solutions  
Unified Communication Solutions



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