



INCLUDED

- User Guide
- Lunch
- Power User Certificate

COST: \$399

**One Day Session
9am - 4pm**

**Small Hands-On
Classes**

**GUARANTEED or
Return for Free
within 90 days**



800-475-1047

www.jcscomputer.com

CUSTOMIZING ACT! 2010

Database Design & Layouts

- Creating a New Database
 - Customizing Fields
- Field Attributes
 - Enter field name and type
 - Customize field and list behavior
 - Customize field behavior
 - Set field triggers
- Manage Drop-down Lists
 - Creating Drop-down Lists for Importing
 - Importing the Drop-down List
 - Minor Changes to the Drop-down List
- Editing the Database Structure
- Field Security
- Creating New Fields for Other Entities
- Defining and Modifying Layouts
 - Designing Layouts
 - Saving Layouts
 - The Tool Palette/Formatting Toolbar
 - Modifying Layouts
 - Renaming the Field Labels
 - Moving and Aligning Objects
 - Adding New Fields to Your Layout
 - Layout Tabs
 - Adding Other Objects
 - Formatting
 - Changing Background Tab Color
 - Make Same Width or Height
- Testing Your Layouts/Field Entry Order

Running & Designing Reports

- ACT! Reports
 - Favorite Reports
- Report Templates
 - The Report Designer Screen
 - The Report and Page Header Sections
 - The Detail Section
 - The Report and Page Footer Sections
- Adding Report Objects
 - Formatting
 - Fields and Labels
 - Sizing Sections
 - Group By for Sorting or Subtotals
 - Section Behavior
 - Summary Fields
 - Subreports
- Report Filters
 - Using Custom Reports
- Using Scripting in Your Reports
 - Removing Blank Space Between Fields
 - Printing Checkmarks for Yes/No Fields
 - Choose Home or Business on the Fly

Customized Templates

- Choosing a Word processor
- ACT!'s Menu Item in Word
- Creating a Mail Merge Template
 - The EmailBody Template
 - Merging the Template with a Lookup
- Envelopes and Mailing Labels
- ACT! E-marketing
 - Creating Your First Swiftpage Template
 - What is an [[SPEPersonalMessage]]?
- Sending the Template
- Creating a New Template Using Your Base
- E-marketing and Swiftpage Help
 - ACT! Word Processor
 - ACT! Toolbar, Ruler, Status Bar
 - Tables
 - Graphics

Designing Dashboards

- Using and Displaying Dashboards
- Creating Custom Dashboards
 - Custom Components

Feature Customizations

- Customizing Menus and Toolbars
 - Editing a Custom Command
 - Resetting Toolbars, Menus, Keyboard
- Customizing the Welcome Page
- Modifying the Nav Bar
- Creating Custom Web Info Links
- Customizing Priorities
- Creating New Activity Types
- Creating and Scheduling Activity Series
- Other Opportunity Customizations
 - Creating a Custom Process
 - Creating Defined Product Lists
 - Editing the Quote Template
- Mapping ACT! Fields into Microsoft Excel
 - Preparing/Merging the Excel File

Appendix

- Layout and Report Properties



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SOLUTIONS DELIVERED

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Would you like to be more successful using your ACT! software investment? Taught by a SAGE Certified ACT Premier Trainer and hands on so you can learn how to use the most advanced features found in ACT! Learn how to customize the database and mold it to fit your company needs. Then create personalized reports and selection criteria to get the information the way you need it. This class is designed to help you get the most out of your software investment by helping you understand how to leverage the power of ACT!

Training is an integral part of any successful software investment. That's why we recommend training with every ACT! Software system we install. The CRM Connection will help you to use ACT! Software to its fullest potential, whether you are using ACT! 2009, ACT! 2008, ACT! 2007, ACT! 2006, ACT! 2005 or ACT! 6.0. Guaranteed!

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Payment in full is required for registration. You will receive confirmation for your requested class date once available space has been confirmed. Please wait on confirmation prior to making travel arrangements as classes do fill up. I have read & agree to the above terms and rates. JCS is authorized to apply charges to the above credit card for support services requested. Credit card or check accepted for On-sites & classes.

Fax to 800/467-7672 or call now Toll Free 800/475-1047 to register for class
P.S. Guaranteed or the next class is FREE! – ACT! Technical Support available