Inter-company (grouped) Training

SOLUTION

Act! Administrator Training course

Training objectives

After a day of training administrators will have acquired al principles governing the administration of the software. Administrators must previously know the application Act! or be trained on using the software that is the subject of an other lesson plan.

Location

Remotely (preferred) or on our premises.

Duration

1 day (7 hours).

Intended audience

Act! Administrators.

Prerequisites

• The section on installation, data integration, management backups and setting up synchronization, needs to have very good knowledge of computers.
• The section on setting Act! needs to have a good command computer tools and a knowledge of the relationship management customer and flows of the company.

Equipment and software

Each attendee must have a computer with the software which is the subject of the training installed. Remote Training courses require an Internet access and a phone or a computer with microphone/speakers (headset recommended). The videoconferencing solution that we are using allows each participant to follow the training from anywhere, by teleworking or from one of his company's sites. Phone calls are free from 34 countries, internet calls are totally free.

act! Premier Trainer

eSolution

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Course Outline

Installing Act!

• Requirements and how to install SQL Server and Act! on a data server.
• Requirements and how to install Act! on a user (mobile or fixed).
• Specific Windows environments.
• Registration and Act! Licensing.

Managing the database

• How to create and share Act! database.
• Managing backups and using Act! Task Scheduler.
• How to restore a database.
• Database maintenance (integrity check, purge old data, …).
• Using the Advanced Administration Tool ActDiag.

User management and rights

• Manage user access accounts and defining the rights on Act!.
• How to manage the departure of a colleague and the reallocation of financial mass.
• The different types of users (administrator, manager, …).
• The management team.
• Management of user rights on p% data.

Database configuration

• How to create fields in Act!.
• The different field types (text, checkbox, date / time, …).
• Act! System Fields.
• The management of the drop-down lists (single selection, multiple selection, …).
• Managing principal and required fields.
• Managing the rights to the fields (read-only, read / write).
• Develop / modify a presentation / user interface.
• Manage multiple types of presentation.
• How to lay out the cards Company / Contact / Opportunity.
• Managing the tabs, the positioning of fields, tab, …
• Definition of cycles or commercial sales opportunities.
• Customizing the management of historical.
• Customizing activity sets.
• How to create document templates or Word Act! and integrate fields Contact sheet (name, address, …).
• Set up the coupling between p% and messaging with Outlook / Lotus or SMTP mode.
• Adaptation simple Act! dashboards and reports.
• Customize Act! menus and toolbar.
• Set your preferences and initialization parameters.

The data exchange

• Setting preferences and initialization parameters.
• Conversion of a database.
• The potential for data export.
• The management of preventive and curative duplicates.

Act! Synchronization

• The principles of Act! synchronization.
• The role of users in the synchronization process.
• Synchronized and unsynchronized.
• System Synchronization.
• And Deploying remote databases.
• Automatic synchronization and using Act! Task Scheduler.
• The synchronization service Act! Premium.
• Sync through a VPN tunnel.