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**Microsoft**  
**GOLD CERTIFIED**

Partner

**isett seta**  
COMMITTED TO SKILLS DEVELOPMENT IN THE ICT SECTOR

## ACT! 2007: Level 2

### Course Specifications

Course number: 084744  
Software: ACT! 2007  
Course length: 1.0 day(s)

### Course Description

In the first course in this series, ACT! 2007 Level 1, you gained the basic skills required to organize contact information in a database. In addition to organizing and working with data, you might also want to search and retrieve specific information about your contacts, send email to them, and also maintain information without any data loss. In this course, you will query and exchange data, customize the ACT! 2007 environment to work with templates, administer ACT!, and use its Internet features.

**Course Objective:** You will query and exchange data, customize the ACT! 2007 environment to work with templates, administer ACT!, and use its Internet features.

**Target Student:** This course is intended for corporate users, small business owners, government, medical, education, and non-profit entities.

**Prerequisites:** To ensure your success, it is required that you have basic PC skills and an understanding of Windows.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Performance-Based Objectives

Upon successful completion of this course, students will be able to:

- describe standard lookup and a query.
- exchange data.
- customize the ACT! 2007 environment.
- work with templates and the Mail Merge feature in ACT! 2007.
- customize the report template to extract information from your database.
- examine how to administer the ACT! 2007 database.
- use the Internet and email features of ACT! 2007.

### Course Content

#### Lesson 1: Creating Queries

- Topic 1A: Perform a Lookup
- Topic 1B: Create Advanced Queries

#### Lesson 2: Exchanging Data

- Topic 2A: Import Data
- Topic 2B: Export Data
- Topic 2C: Exchange Data Using the ACT! Link for Pocket PC Wizard
- Topic 2D: Synchronize Data

#### Lesson 3: Customizing the ACT! 2007 Environment

- Topic 3A: Specify Startup Preferences
- Topic 3B: Customize Fields in a Database
- Topic 3C: Customize Layouts
- Topic 3D: Modify Menus and Keyboard Shortcuts

#### Lesson 4: Working with Templates and Mail Merge

- Topic 4A: Create a Mail Merge Template
- Topic 4B: Generate Form Letters
- Topic 4C: Add Templates to the Write Menu

#### Lesson 5: Customizing Report Templates

- Topic 5A: Modify the Report Template
- Topic 5B: Use a Custom Report Template

#### Lesson 6: Administrating the ACT! 2007 Database

- Topic 6A: Manage Data Security
- Topic 6B: Perform Database Maintenance

#### Lesson 7: Using the Internet and Email Features of ACT! 2007

- Topic 7A: Use Web Page Attachments
- Topic 7B: Generate Maps and Driving Directions
- Topic 7C: Integrate ACT! 2007 with Email Programs