

ACT! 2011 Introduction

by
Kim Kendall

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2 Finding Your Way Around

The default Contact Screen in ACT! typically looks like this....

The screenshot displays the Sage ACT! Premium - ACT2011Demo application window. The title bar indicates the database name. The interface includes a menu bar (File, Edit, View, Lookup, Contacts, Schedule, Write, Reports, Tools, Help) and a toolbar with icons for navigation and actions. The main area is divided into several sections:

- Lookup:** A search field with a dropdown menu and a 'Go' button.
- Related Tasks:** A list of tasks such as 'View All Contacts', 'Write Letter', 'Print Current Screen', etc.
- Contact Information:** A form for 'CH TechONE' with fields for Contact (Chris Huffman), Salutation (Chris), Company (CH TechONE), Key Contact, Title (CEO), Department (Administration), Address (13 East 54th St., Suite 300, New York, NY 10008, United States), and various phone and email fields.
- History/Activities:** A table showing a list of activities with columns for Date, Time, and Regarding. The first entry is dated 26/04/2009 at 17:37, regarding 'What You Should Know About This Demo Database'. The second entry is dated 13/02/2005 at 21:49, regarding 'Visit ACT! Add-Ons website'.
- Navigation Panel:** A vertical sidebar on the left with buttons for Welcome, Contacts, Groups, Companies, Calendar, Task List, Opportunities, Reports, and Dashboard.

- 👉 The title bar of the window shows that we are in the *ACT2011Demo* database.
- 👉 When we first login to ACT! it displays our own contact record. Here I have logged in as Chris Huffman.

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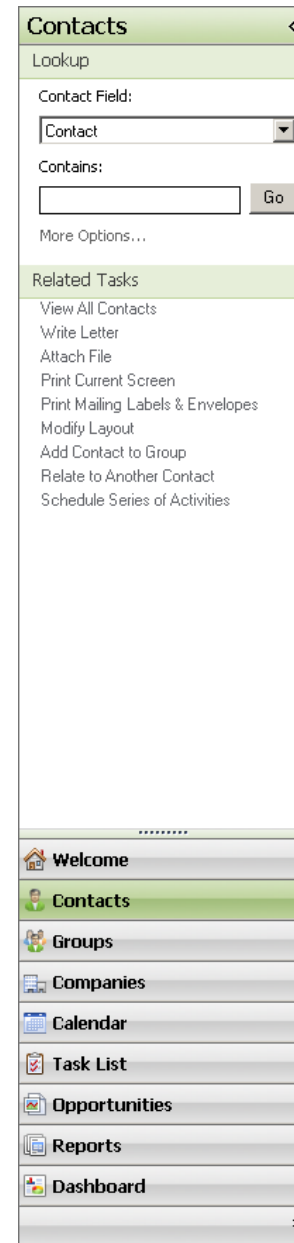
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2.1 The Navigation Bar

The Navigation Bar is on the left of the screen and it looks like this in the Contact view....



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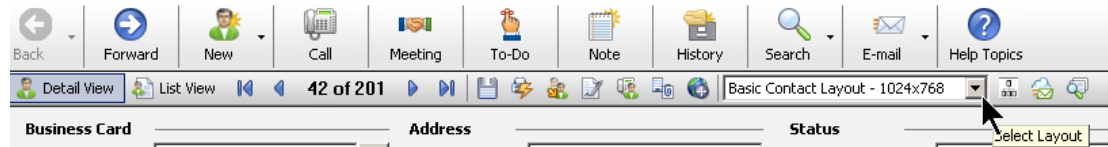


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Here you can see that we have **Contacts** selected - see the green button in the bottom part. We can move to another view of the program by clicking on one of the other items, e.g. Calendar. When we do this the options in the upper part of the navigation bar also change to try to help us with things we might want to do in that area.

2.2 Layouts

There are various layouts which can be used and it's simple enough for your ACT! administrator to create new layouts if required. Layouts simply define the database fields we wish to see. To change layouts click on the layout dropdown on the Contact Detail Toolbar and select the name of your layout: like this:



Layouts can be used for presenting different information, e.g. a Sales person may well need different information from a Parts Manager.

The layout we're displaying above is called: *Basic Contact Layout – 1024x768*.

The top part of the main area of the screen shows the general contact information – things like Company name, Contact name, Phone number, Address and E-mail are given. They are the fields you almost always want to see.

The bottom part of the screen is a tabbed area. Let's run through the tabs one by one....