

Features and Access by User Role

The following table lists features and functions and the roles that can access them. For more information about user roles, see the About user roles and permissions.

The term "my" in the table means that the user is the Record Manager for that item. The Record Manager owns the record. For example, "Delete my contacts" means the user can delete the contacts he or she is the Record Manager of. For more information, see About the Record Manager.

⁽¹⁾ Indicates the user can be assigned this permission. ⁽²⁾ Indicates that the permission applies to remote databases only. ⁽³⁾ Indicates that the permission applies to ACT! Premium databases only.

Feature or Function	Administrator	Manager	Standard	Restricted	Browse
Accounting link					
Perform accounting link tasks	X	X ⁽¹⁾	X ⁽¹⁾		
Activities					
Associate activities with groups and companies	X	X	X	X	
Copy/remove activities and tasks with Outlook	X	X	X	X	
Manage activity types, events, priorities	X	X			
Manage resources (ACT! Premium)	X	X			
Schedule/edit/delete my activities	X	X	X	X	
Schedule/edit/delete activities for other users	X	X			
Activity Series					
Create/edit activity series templates	X	X	X		
Delete my activity series templates	X	X	X ⁽¹⁾⁽³⁾		
Delete other users' activity series	X	X			
Schedule activity series	X	X	X	X	
ACT! Scheduler					
Create/edit/delete database backup tasks	X	X ⁽¹⁾⁽²⁾	X ⁽¹⁾⁽²⁾		
Create/edit/delete database maintenance tasks	X	X ⁽¹⁾⁽²⁾	X ⁽¹⁾⁽²⁾		
Create/edit/delete database synchronization tasks	X	X	X		
Create/edit/delete Outlook tasks	X	X	X	X	
View/purge the task log	X	X	X		
Communications					
Create/edit/delete word-processing templates	X	X	X		
Enable e-mail (includes using Outlook integration)	X	X	X	X	X
Enable word processing	X	X	X	X	
Transfer/restore ACT! email	X	X	X	X	X

Companies					
Associate with opportunities, activities	X	X	X	X	
Create/edit companies	X	X	X		
Delete my companies	X	X	X ⁽¹⁾⁽³⁾		
Delete other users' companies	X	X			
Link/unlink my contacts	X	X	X		
Link/unlink other users' contacts	X	X			
Manage my companies (change Record Manager; change record access)	X	X	X		
Manage other users' companies (change Record Manager)	X	X			
Contacts					
Attach Web pages to	X	X	X	X	
Create/edit contacts	X	X	X	X	
Delete my contacts	X	X	X ⁽¹⁾⁽³⁾		
Delete other users' contacts	X	X			
Duplicate contacts	X	X	X	X	
Manage my contacts record access	X	X	X	X	
Manage other users' contacts (change Record Manager; change record access)	X	X			
Conversion					
Convert ACT! 3.x - 6.x databases	X				
Convert ACT! 3.x - 6.x supplemental files	X	X			
Upgrade ACT! 7.x - 10.x databases	X	X			
Customization					
Access Layout Designer	X	X			
Customize columns	X	X	X	X	X
Customize menus and toolbars	X	X	X		
Customize navigation bar	X	X	X	X	X
Dashboard					
Access data from components	X	X	X	X	X
Create/edit/delete Dashboards	X	X			
Filter data in components	X	X	X	X	X
View/switch Dashboards	X	X	X	X	X

Data Exchange					
Export data (includes product lists and drop-down lists)	X	X			
Export records via e-mail	X	X			
Export to Excel (list views only)	X	X	X ⁽¹⁾⁽³⁾		
Import data (includes product lists and drop-down lists)	X	X			
Import records via e-mail	X	X	X		
Database Management/Maintenance					
Back up databases	X	X	X ⁽¹⁾⁽²⁾		
Back up personal files	X	X	X	X	X
Copy databases	X	X			
Copy/move contact data	X	X	X ⁽²⁾		
Create databases	X	X	X	X	X
Define fields	X	X			
Delete databases	X				
Lock databases	X	X	X ⁽¹⁾⁽²⁾		
Manage ACT! serial numbers	X				
Move databases	X				
Perform check and repair	X	X ⁽¹⁾⁽²⁾	X ⁽¹⁾⁽²⁾		
Perform remote administration	X	X ⁽¹⁾⁽²⁾	X ⁽¹⁾⁽²⁾		
Remove old data	X				
Restore personal files	X	X	X	X	X
Restore databases	X	X ⁽¹⁾⁽²⁾	X ⁽¹⁾⁽²⁾		
Run ACT! Update (not all users can update the database schema)	X	X	X	X	X
Scan for duplicate contacts	X	X	X	X	X
Set and maintain password policy	X				
Share databases	X				
Update the database schema	X	X			
Groups					
Create/edit groups	X	X	X		
Delete my groups	X	X	X ⁽¹⁾⁽³⁾		
Delete other users' groups	X	X			
Duplicate groups	X	X	X		
Manage my groups record access	X	X	X		
Manage other users' groups (change Record Manager and control user access)	X	X			

Histories					
Change record access for my histories	X	X	X	X	
Manage other users' histories (change Record Manager; change record access)	X	X			
Record/edit histories	X	X	X	X	
Set preference for editing histories	X	X			
Share histories with groups and companies	X	X	X	X	
Internet Services					
Use Internet Services	X	X	X	X	X
Lookups and queries					
Create/edit Advanced queries	X	X	X	X	X
Perform keyword search	X	X	X	X	X
Perform lookups	X	X	X	X	X
Save lookup as company	X	X	X		
Notes					
Change record access for my notes	X	X	X	X	
Insert/edit notes	X	X	X	X	
Manage other users' notes (change Record Manager; change record access)	X	X			
Set preference for editing notes	X	X			
Share notes with groups and companies	X	X			
Opportunities					
Associate opportunities with groups and companies	X	X	X	X	
Create/edit opportunities	X	X	X	X	
Create opportunity graphs and pipelines	X	X	X	X	X
Delete my opportunities	X	X	X ⁽¹⁾⁽³⁾		
Delete other users' opportunities	X	X			
Manage my opportunities record access	X	X	X	X	
Manage opportunity processes and products	X	X			
Manage other users' opportunities (change Record Manager; change record access)	X	X			
Preferences					
Manage user preferences	X	X	X	X	X
Manage database preferences	X	X	X		

Printing					
Print calendars, address books, and contact, company, and group information	X	X	X	X	X
Reporting					
Create/edit reports	X	X	X		
Run reports	X	X	X	X	X
Synchronization					
Change remote sync status (disable/suspend)	X	X			
Change expiration period for any remote database	X	X			
Create/delete/re-create remote databases	X	X			
Create/edit/delete Sync Sets	X	X			
Enable synchronization (main database only)	X	X			
Initiate synchronization (remote database only)	X	X	X		
Manage database locations	X	X ⁽²⁾			
Manage Subscription List	X	X ⁽¹⁾⁽²⁾	X ⁽¹⁾⁽²⁾		
Manage synchronization set-up (main database)	X	X			
Perform handheld device sync	X	X ⁽¹⁾	X ⁽¹⁾		
Print synchronization settings	X	X	X		
Recreate remote databases	X	X			
User Management					
Manage teams (ACT! Premium)	X	X			
Manage users	X				