



**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 [What Are 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 [What Is the Record Manager?](#).

[Click here to see the table in this topic](#) .

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

Feature or Function	Administrator	Manager	Standard	Restricted	Bro
<b>Accounting/back-office link</b>					
Perform accounting link tasks	X	X <sup>(1)</sup>	X <sup>(1)</sup>		
<b>Activities</b>					
Associate groups, companies, opportunities	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			
<b>Activity Series</b>					
Create/edit activity series templates	X	X	X		
Delete my activity series templates	X	X	X <sup>(1)(3)</sup>		
Delete other users' activity series	X	X			
Schedule activity series	X	X	X	X	
<b>ACT! Scheduler</b>					
Create/edit/delete database backup tasks	X	X <sup>(1)(2)</sup>	X <sup>(1)(2)</sup>		

Feature or Function	Administrator	Manager	Standard	Restricted	Bro
Create/edit/delete database maintenance tasks	X	X <sup>(1)(2)</sup>	X <sup>(1)(2)</sup>		
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		
<b>Communications</b>					
Create/edit/delete word-processing templates	X	X	X		
Enable e-mail (includes using Outlook integration)	X	X	X	X	
Enable word processing	X	X	X	X	
Transfer/restore ACT! e-mail	X	X	X	X	
<b>Companies</b>					
Associate with opportunities, activities	X	X	X	X	
Create/edit companies	X	X	X		
Delete my companies	X	X	X <sup>(1)(3)</sup>		
Delete other users' companies	X	X			
Duplicate companies	X	X	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		

Feature or Function	Administrator	Manager	Standard	Restricted	Bro
Manage other users' companies (change Record Manager)	X	X			
<b>Contacts</b>					
Attach Web pages to	X	X	X	X	
Create/edit contacts	X	X	X	X	
Delete my contacts	X	X	X <sup>(1)(3)</sup>		
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			
<b>Conversion/Upgrade</b>					
Convert ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) databases	X				
Convert ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) supplemental files	X	X			
Upgrade ACT!2005 (7.x), 2006 (8.x), 2007 (9.x), 2008 (10.x), or 2009 (11.x) databases	X	X			
<b>Customization</b>					
Customize columns in list views and tabs	X	X	X	X	)
Customize layouts	X	X			
Customize menus and toolbars	X	X	X		
Customize Navbar	X	X	X	X	)
<b>Dashboard</b>					
Create/edit/delete Dashboards	X	X			

Feature or Function	Administrator	Manager	Standard	Restricted	Bro
Filter data in components	X	X	X	X	)
View/select Dashboards	X	X	X	X	X
<b>Data Exchange</b>					
Export data (includes product lists and drop-down lists)	X	X			
Export to Excel (list views only)	X	X	X <sup>(1)(3)</sup>		
Import data (includes product lists and drop-down lists)	X	X			
<b>Database Management/Maintenance</b>					
Back up databases	X	X	X <sup>(1)(2)</sup>		
Back up personal files	X	X	X	X	)
Copy databases	X	X			
Copy/move contact data	X	X	X <sup>(2)</sup>		
Create databases	X	X	X	X	)
Define fields	X	X			
Delete databases	X				
Lock databases	X	X	X <sup>(1)(2)</sup>		
Manage ACT! serial numbers	X				
Move databases	X				
Perform check and repair	X	X <sup>(1)(2)</sup>	X <sup>(1)(2)</sup>		
Perform remote administration	X	X <sup>(1)(2)</sup>	X <sup>(1)(2)</sup>		
Remove old data	X				
Restore personal files	X	X	X	X	)
Restore databases	X	X <sup>(1)(2)</sup>	X <sup>(1)(2)</sup>		

Feature or Function	Administrator	Manager	Standard	Restricted	Bro
Run ACT! Update (not all users can update the database schema)	X	X	X	X	)
Scan for duplicate contacts	X	X	X	X	)
Set and maintain password policy	X				
Share databases	X				
Update the database schema	X	X			
<b>Groups</b>					
Create/edit groups	X	X	X		
Delete my groups	X	X	X <sup>(1)(3)</sup>		
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			
<b>Histories</b>					
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	
<b>Internet Services (ACT! Links)</b>					
Use ACT! Links	X	X	X	X	)

Feature or Function	Administrator	Manager	Standard	Restricted	Bro
<b>Lookups and queries</b>					
Create/edit Advanced queries	X	X	X	X	)
Perform keyword search	X	X	X	X	)
Perform lookups	X	X	X	X	)
Save lookup as company	X	X	X		
<b>Notes</b>					
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			
<b>Opportunities</b>					
Associate contacts, groups, and companies	X	X	X	X	
Create/edit opportunities	X	X	X	X	
Create opportunity graphs and pipelines	X	X	X	X	)
Delete my opportunities	X	X	X <sup>(1)</sup>		
Delete other users' opportunities	X	X			
Duplicate opportunities	X	X	X	X	
Manage my opportunities record access	X	X	X	X	

Feature or Function	Administrator	Manager	Standard	Restricted	Bro
Manage opportunity processes and products	X	X			
Manage other users' opportunities (change Record Manager; change record access)	X	X			
<b>Preferences</b>					
Manage user preferences	X	X	X	X	)
Manage database preferences	X	X	X		
<b>Printing</b>					
Print calendars, address books, and contact, company, and group information	X	X	X	X	)
<b>Reporting</b>					
Create/edit/delete reports	X	X	X		
Run reports	X	X	X	X	)
<b>Synchronization</b>					
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		

Feature or Function	Administrator	Manager	Standard	Restricted	Bro
Manage database locations	X	X <sup>(2)</sup>			
Manage Subscription List	X	X <sup>(1)(2)</sup>	X <sup>(1)(2)</sup>		
Manage synchronization set-up (main database)	X	X			
Perform handheld device sync	X	X <sup>(1)</sup>	X <sup>(1)</sup>		
Print synchronization settings	X	X	X		
Recreate remote databases	X	X			
<b>User Management</b>					
Manage teams (ACT! Premium)	X	X			
Manage users	X				

Need more help? To view additional user assistance resources, click [Scenarios](#) or [Troubleshooting Tips](#). To get technical assistance or help using the software, from the Welcome page, under [Support & Services](#), click [Contact Technical Support](#).

To send your feedback for improving ACT! Help or documentation, click [here](#). Thank you.