

INTRODUCTION TO ACT! -Course Outline

The Basics

Act! Overview
Anytime, Anywhere Access
ACT! Pro vs. ACT! Premium
Starting Your ACT! Software
ACT! Screen Elements
Welcome Page
The Nav Bar
Contact Record Basics
Inserting a New Contact Record

Working with Your Contacts

Locating Contacts
Lookup Variations

- Detail View and List View (Contact List)
- Universal Search

Secondary Contacts
Documents Tab
Relationships
Web Info Tab
Relationship Tab

Scheduling Your Day

Scheduling Basics

- Recording an Unscheduled Activity to History

Using Your Calendar
Calendar vs. Task List
Clearing Activities
Taking Notes

- History vs. Notes
- Filtering History (by Date, Type, User & Keyword)

Advanced Scheduling

Scheduling

- Delegating to other ACT! Users
- Scheduling for Multiple Contacts

Public vs. Private Activities
Attachments
Scheduling Recurring Activities

Written Communications

Setting Up Your E-mail System in ACT!

- ACT!'s Integration with Outlook
 - Creating a Contact from an E-mail
 - Merging an E-mail Template
 - Attaching an E-mail to a Contact
 - Sending Contact Information as a vCard

Mail-merge Templates
Envelopes and Mailing Labels
ACT! Word Processor vs MS Word

Advanced Lookups

Activity Data Mining
Queries
Lookup By Example
Advanced Queries

Groups & Companies

Creating and Populating a Group or Company
Divisions and Subgroups
Cumulative Views of Notes, History, etc.
Lookup Companies or Groups

Opportunities

Creating & Updating Opportunities
Creating a Quote
Closing the Deal
Opportunity Management
Opportunity Reports

Viewing Dashboards & Reports

Using Dashboards
ACT! Reports introduction

- Basic Editing

This syllabus is derived from 'The Quickstudy Guide for Act' guide which is developed by Cornerstone Solutions.

This syllabus can be modified to meet your custom training requirements. Please contact Jordan at (800) 550-4647 for a free assessment of your training requirements.

This course can be adapted to any of the previous versions of Act.