ACT! Course Outline

Duration: 1 Day

Benefit: This course is designed for new users, for those wishing to refresh using ACT! and also those who are 'self-taught' but have used the software for some time. It includes shortcuts and ways of linking information from one section to another in ACT!.

- **Introduction and Creating a Database**
  - ACT! as a Sales and Marketing tool
  - Creating a new database
  - Importing existing data
- **Contacts**
  - The Main Contact Screen, Toolbars and Tabs
  - Contact List View
  - Creating new contacts
  - Creating another contact in the same company
  - Editing and Deleting contact
  - Finding and sorting contacts
  - Using Tag Mode to select or deselect
- **Lookups**
  - Using Look-Ups in the database
  - Narrowing Look-ups
  - Queries
  - Key-Word Search
- **Groups**
  - Creating Groups
  - Creating Sub-Groups
  - Adding Contacts to Groups
  - Viewing Groups
  - Creating Companies
  - Creating Divisions
  - Adding Contacts to Companies
- **Relationships**
  - Creating Relationships between Contacts
  - Using Relationship Links
- **Notes and History**
  - Adding Notes and Histories to Contacts and Companies
  - Attaching documents to contact records
- **Activities**
  - Scheduling Meetings, Calls & To-Dos
  - Clearing completed activities.
  - Viewing the Task List
  - Viewing Tasks in the Calendar
  - Creating Custom Activities
- **Sales Opportunities**
  - Creating New Sales Opportunities
  - Recording information for Marketing
  - Managing the Sales Pipeline
  - Customising the Sales Pipeline
  - Sales Forecasting
  - Exporting your Sales Forecast to Excel
- **Communication Tools**
  - Writing a Letter, Fax or Memo
  - Using Letter Templates
  - Running a Mail-Merge to a group of Contacts
  - Printing Labels and Envelopes
  - Writing an E-Mail
  - Attaching E-Mails to the Contact
  - Mail Merge E-Mails
- **Outlook Integration**
  - Sending E-Mails through Outlook
  - Receiving E-Mails through Outlook
  - Setting up an ACT! Address Book in Outlook
- **Calendar**
  - Sharing Calendar information between ACT! and Outlook
- **Dashboard**
  - Reporting Dashboards and types of dashboard
  - Changing the dashboard
  - Filtering dashboard data and creating new Dashboards
- **Reports**
  - Text Reports
  - Standard Reports
  - Opportunity Reports
  - Activity Reports
  - Modifying Reports
- **Exporting Excel**
  - Exporting to Excel

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