ACT! 2010: EVERYDAY

ACT! PREMIER TRAINER

ACT! CERTIFIED CONSULTANT

INCLUDED
- User Guide
- Lunch
- Power User Certificate

COST: $399
One Day Session
9am - 4pm

Small Hands-On Classes

GUARANTEED or Return for Free within 90 days

Working With ACT! Basics

- What's Contact Management Software?
  - Starting ACT!
  - Log on
- Opening a Database
  - Setting Up For Class
  - Opening Other DatA bases
- ACT! Screen Elements
- Welcome Page
  - Changing Your Startup View
- The Nav Bar
- View Toolbar
  - Layout Tabs
- Layouts
  - Sizing the Contact Detail Window
- Contact Record Basics
  - The "My Record" Contact Record
  - My Record
  - Our Practice Database
  - An Overview of Security Roles
  - Contact Fields
- Inserting a New Contact Record
  - Drop-down Fields
  - Duplicating Contacts
  - Assigning Security
  - Changing Some Preferences
  - Deleting Contacts

Working Your Contacts

- Locating Contacts
  - Browsing Records
- Detail View and List View
  - Sorting the Contact List
  - Related Task Pane
  - Adding and Removing Columns
- Nav Bar Lookup Pane
- Lookup
- Lookup Variations
  - Adding to Lookups
  - Narrowing Lookups
  - Previous Lookups
  - Keyword Searches
  - Lookup, Any fields
  - Lookup Annual Events
- Working In List View
  - Edit Mode
  - Tag Mode
  - Lookup and Omit Tagged Records
  - Printing Lookups
- Secondary Contacts
  - Lookups on Secondary Contact Fields
  - Promoting From Within
- Attachments
  - Opening and Editing Files
- Removing Files from the Documents Tab
- Relationships
- Web Info
  - Web Info Tab
  - Website Links
  - Attaching Web Pages From IE

Working Your Schedule

- Activities
  - Simple Scheduling
- Scheduling Activities using the Calendar
- Viewing the Calendar
  - Calendar Pop-ups
  - Navigation Tips for the Calendar Views
  - The Today Button
  - Filtering the Calendar
- Adding an Outlook Meeting to Calendar
- Sharing Microsoft Outlook and ACT!
- Calendar vs. Task List
- The Task List
  - Filtering the Task List
  - Printing Your Task List
  - Display the Mini-calendar any time!
- Modifying Scheduled Activities
- Clearing Activities
- Recording History
  - Recording History to Multiple Contacts
- Taking Notes
  - Viewing and Editing Notes
  - History vs. Notes
  - Deleting a Note or History
- Scheduling-General Tab
  - Scheduling for Multiple Contacts
  - Scheduling Availability Tab
  - Responding to an ACT! Invitation
  - Alarms
  - Responding to an Alarm
- Scheduling-Recurring Activities
- Advanced Options
  - Attachments
  - Public vs. Private Activities
  - Scheduling Activities for Other Users
  - Displaying Other Users' Activities
  - Adding "Scheduled For" to Task List
- Printing the Calendar
  - Roll Over
- Events

Working With Groups & Companies

- Groups
  - Displaying a Group Lookup
  - Manually Adding a Contact to a Group
- Companies
- Creating/Populating a Group or Company
  - Adding Multiple Contacts
  - Using Criteria for Your Groups
- Linking Contacts to Companies
- Create a Company from a Contact
- Difference between Link and Associate
- Create a Contact from a Company
- Disabling a Company Link
- Pushing Changes Back to Contacts
- Pulling Changes from Company Record
  - Convert a Group to a Company
- Divisions and Subgroups
  - Move or Promote a Division
- Cumulative Views of Notes, History, etc.
  - Company Note or History
  - Sharing Items with a Company/Group
  - Changing Companies
  - Filtering Tabs
- Lookup Companies or Groups

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Working with E-mail and Letters

- ACT! Can Help You Communicate
  - ACT!'s E-Mail Integration
  - Setting Up Your E-mail in ACT!
- ACT!'s Integration with Outlook
  - Sending E-mail from the Contact
  - Sending an E-mail from Outlook
- Choosing a Word Processor
- New Menu Item in Word
- Creating Correspondence
  - Creating a Mail-Merge Template
- Merging the E-mail Template
- Creating Letters, Memos, and Faxes
  - Printing Documents
  - Editing the Attached Document
- Envelopes and Mailing Labels
- Dealing With Your Outlook Inbox
- Adding an Outlook Meeting Request
  - Creating a Contact from an E-mail
  - Attach an E-mail to a Contact
  - Using the Quick Attach Feature
  - Setting Your Quick Attach Preferences
  - Handling Unattached Messages
  - Using the Attach to ACT! Icon
  - Creating an Activity from an E-Mail
- Sending Contact Information as a vCard
- ACT! Reports
  - Favorite Reports

Working with Opportunities

- Creating Opportunities
  - Updating an Opportunity
  - Creating a Quote
  - Closing the Deal
- Opportunities: List View
  - Lookup Opportunities
  - Export to Microsoft Excel
- Opportunity Reports
  - Opportunity Pipeline
  - Opportunity Graph

Working with Dashboards

- Using Dashboards
  - Displaying Dashboard Views
  - Working in the Dashboard Views.
  - Other Dashboards

Working with Synchronization

- Synchronizing Your Remote Database
  - Synchronizing the Remote Database
  - Set up Sync Schedule with Scheduler
  - Using the Subscription List

Appendix

- Understanding Security Roles
- ACT!'s E-Mail
  - Setting Up Your E-mail Signature
  - Understanding ACT! E-mail
  - Sending E-mail from ACT! E-mail
  - Send/Receive Button
- Automatic Update Notification

Would you like to be more successful using your ACT! software investment? Taught by a SAGE Certified ACT Premier Trainer and hands on so you can learn how to use the most advanced features found in ACT! Learn how to customize the database and mold it to fit your company needs. Then create personalized reports and selection criteria to get the information the way you need it. This class is designed to help you get the most out of your software investment by helping you understand how to leverage the power of ACT!

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