



# ACT! SOFTWARE TRAINING CLASS ADVANCED FEATURES

## SAGE PREMIER TRAINING CENTER COURSE OUTLINE

### Database Design and Layout

- Customizing Fields
- Field Attributes
- Manage Drop Down Lists
- Defining and Modifying Layouts
- Testing your Layouts

- Envelopes and Mailing Labels
- ACT! Word Processor
- Formatting E-Mail Templates
- Mapping ACT! Fields into Microsoft Excel
- Opportunity Customizations

### Feature Customizations

- Customizing Menus and Toolbars
- Creating New Activity Types
- Activity Series
- Creating a Custom Document Template
- Merging the Template with a lookup

### Running & Designing Reports

- ACT! Reports
- Report Templates
- Adding Report Objects
- Report Filters
- Scrunching Fields
- Using Custom Fields

### Questions and Answers

### 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**

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!

Training is an integral part of any successful software investment. That's why we recommend training with every ACT! Software system we install. The CRM Connection will help you to use ACT! Software to its fullest potential, whether you are using ACT! 2009, ACT! 2008, ACT! 2007, ACT! 2006, ACT! 2005 or ACT! 6.0. Guaranteed!

**View dates or sign up [www.jcscomputer.com](http://www.jcscomputer.com)  
ACT! Now Call Toll Free 800/475-1047**

Class Date: \_\_\_\_\_

Payment Method:

VISA  Master Card  American Express  Discover Please fax or e-mail paid invoice.

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State, Zip Code

Payment in full is required for registration. You will receive confirmation for your requested class date once available space has been confirmed. Please wait on confirmation prior to making travel arrangements as classes do fill up. I have read & agree to the above terms and rates. JCS is authorized to apply charges to the above credit card for support services requested. Credit card or check accepted for On-sites & classes.

Fax to 800/467-7672 or call now Toll Free 800/475-1047 to register for class  
P.S. Guaranteed or the next class is FREE! – ACT! Technical Support available



**SOLUTIONS DELIVERED**