

Becoming an ACT! POWER USER



AGENDA

Introduction & Housekeeping

- Student & Instructor Introductions

Getting Started

- Logging on to ACT!
- Navigating the menus within ACT!
- Logging off

Working with Contacts

- Working with the 'My Record'
- Creating and deleting contacts
- Working with Secondary Contacts
- Using names and salutations
- Entering notes – (Notes v. Histories)
- Attaching files to a contact

Lookups & Queries

- Performing simple lookups (Who, then what)
- Performing special lookups
- Replacing, adding to, and narrowing lookups
- Keyword searches

Lunch Break

Contact List View

- Using the Contact List view
- Refining and creating lookups
- Customizing the Contact List view
- Integrating Microsoft Excel

Companies & Groups

- Adding and removing
- Managing companies and groups
- Managing divisions and sub-groups

Scheduling Activities

- Navigating the calendar views
- Scheduling activities
- Completing activities
- Recording Histories

Break

Writing Letters

- Creating template-based letters
- Creating templates
- Mail merge
- Recording letter histories

Using E-mail

- Setting e-mail preferences
- Viewing e-mail in ACT!
- Composing e-mail messages
- Recording e-mail histories

Running Reports

- Contact reports
- Activity reports
- History reports

Wrap-Up

- Course Recap
- How to get help
- Questions & Answers