



Becoming an ACT! Power User 4-Hour Class

Objective: After this course, the student will be able to use ACT! to add new contacts, look them up, record history such as phone conversation notes), integrate e-mail, manage groups, manage a calendar, create a sales forecast, execute a mail-merge and print labels.

Working with Contacts (30-45 minutes)

The ACT! Interface

- Identifying Key Elements of the ACT! Interface
 - Contact Detail View
 - Sidebar (Groups, Opportunities, Dashboards)
 - Layout Switcher
 - Record Counter
 - The My Record
- Explain, Find and Correct the My Record

Creating & Deleting Contacts

- Inserting a Contact
- Duplicating a Contact
- Deleting Contacts

Entering History and Notes for a Contact

- Inserting a History (Phone conversation or meeting notes) for a contact
- Insert Note (Extra Information you cannot place anywhere else) for a contact and distinguish between history and Notes

Attaching Files to a Contact

- Attaching a file to a contact record (History Tab)
- Attaching a file to a contact record (Documents Tab)

E-Mail (30 minutes)

- Compose a New Message through ACT!
- Distinguish History Options
- Manage Incoming Message
- Option: Auto-Attach incoming messages for ACT! 2009 +(for Advanced Outlook Users)



Basic Lookups (20 minutes)

Simple Lookups

- Looking Up All Contacts
- Looking Up on Basic Fields
- Lookup other fields by right-clicking
- Looking Up Keyword

Looking Up Empty/Non-Empty Fields

- Looking up Empty Fields
- Looking Up Non-Empty Fields

Lookup Two Fields at once

- Add to Lookup & Narrow Lookup

Lookup Annual Events

Lookup by Contact Activity

Manipulating List Views (10 minutes)

Contact List View Basics

- Launching the Contact List View
- Sorting Contacts
- Lookup Contacts in Contact List View

Customizing the Contact List View

- Adding Columns
- Removing Columns
- Rearranging Columns

The Tag Mode

- Switching to the Tag Mode
- Building a Lookup in the Tag Mode
- Refining a Lookup in the Tag Mode

Export to Excel

(Break!)



Scheduling Activities (45 minutes – 1 Hour)

Navigating the Calendar Views

- Viewing the Daily Calendar
- Viewing the Weekly Calendar
- Viewing the Monthly Calendar
- Filtering the Calendar

Scheduling Activities

- Scheduling an Activity
- Editing an Existing Activity
- Rescheduling an Activity
- Using Alarms

Completing Activities

- Clearing an Activity
- Erasing an Activity
- Recording a History of an Unscheduled Activity

Using the Task List

- Editing Activities in the Task List
- Sorting the Task List
- Changing Task List Columns

Advanced Scheduling

Working with Multiple Activities

- Scheduling an Activity for Multiple Contacts
- Scheduling a Recurring Activity
- Scheduling for Others



Using Groups (30-45 minutes)

Creating Groups

- Creating a Group
- Creating a Subgroup
- Deleting Groups or Subgroups
- Renaming an Existing Group

Changing Group Membership

- Adding/Removing Static Contacts to a Group
- Adding/Removing Dynamic Contacts to a Group
- Adding the current lookup to a Group
- Changing Group Membership in the Contact View

Looking Up Contacts in a Group

- Looking Up Group Members from the Contact View
- Viewing Group Members in the Groups View

Using Opportunities

- Opportunity Overview

Setting up Products and Processes

- Manage Product List
- Manage Sales Process

Enter, Edit and Complete Opportunities

- Creating Opportunities
- Editing Opportunities
- Lookup and Filter Opportunities
- Closing Opportunities

Reports and Measure Progress

- Running Reports
- Running Graphs
- Exporting to Excel

Mail-Merge (20 minutes)

- Write a Letter
- Edit a Document Template
- Convert an Existing Document
- Mail-Merge to Many



- Printing Labels

Options

Using Companies

Creating Companies

- Creating a Company
- Creating a Divisions
- Deleting Companies or Divisions
- Renaming an Existing Company

Changing Company Membership

- Adding Contacts to a Company
- Removing Contacts from a Company

Looking Up Contacts in a Company

- Looking Up Group Members from the Contact View

Viewing Group Members in the Companies View

Further Training & Technical Support Resources

- Free Stuff
 - Press "F1" when in ACT! for context sensitive help
 - <http://support.act.com>
 - Help Pull-down menu offers a "Quick-Reference" card for keyboard shortcuts
- On-Demand Movies
 - Learn ACT! without reading a manual – <http://www.mondolessons.com> –
- Books
 - ACT! for Dummies by Karen Fredricks – Available at <http://www.techbenders.com/>
 - ACT! Quick Study Guide by Sage Software - <http://www.act.com/community/qsg/index.cfm>
 - ACT! Everyday by Cornerstone Solutions – <http://www.cornerstonesolutions.com>