Mondolessons for Act! 2010+ – Supplemental Notes

Course Name: Managing Groups

Conditions for Success: Act! should be installed. Courses should be watched in uninterrupted 3-5 minute segments. Have some contacts already setup with ID/Status=Prospect or ID/Status=Customer. You may also consider an example of setting up a seminar and managing who you have invited and who is attending.

Duration: 41:05

Objective	Key Objectives	Discussion Point in Video
1	Define group records	01:24
2	Identify the various means to add contacts to groups	11:47
3	Demonstrate how to attach documents to group records	15:40
4	Run Group Membership reports	17:45

- Groups for your database could include:
  - When more than one criteria is used to find the clients
    - Example: ID/Status=Prospect OR ID/Status=Customer
  - When the criteria change often
    - Example: Opportunity Estimated Close Date is WITHIN 30 Days
    - Example: Find a new contacts created within the last 30 days
  - When you want to group disparate contacts together for an event such as a golf outing or open house

Samples	Discussion Point in Video (Minutes & Seconds from Beginning)
Newsletter Membership	01:21
Customers with E-Mail Address	04:44
Territory Management	06:13
Upcoming Opportunities in 30 Days by Sales Rep	10:08
Event Attendance	11:40