

ACT! Basic Training

www.F1LA.net

877-569-8005

Support@F1LA.net

Course Outline

Getting started

Using ACT!

- Starting ACT!
- Examining the ACT! window

Navigating in ACT!

- Using database navigation techniques
- Locating specific data

Closing a database

- Closing a database and closing ACT!

Working with contacts

Working with the My Record

- Looking up the My Record

Creating and deleting contacts

- Adding a new contact to the database
- Duplicating an existing contact
- Permanently deleting a contact
- Deleting multiple contacts in one step

Working with secondary contacts

- Adding a secondary contact
- Editing and deleting a secondary contact
- Promoting a secondary contact

Using names and salutations

- Specifying a contact's first, middle, and last names
- Setting name preferences
- Updating the salutation for multiple contacts

Entering notes

- Inserting a note for a contact
- Inserting a note for multiple contacts

Attaching files to a contact

- Attaching a file to a contact record
- Launching and viewing an attached file

Companies and divisions

Adding and removing companies

- Adding a new company record
- Deleting a company record

Managing companies

- Associating a contact with a company
- Updating address data automatically

Managing divisions

- Adding a new division

Simple lookups

Performing simple lookups

- Performing a lookup of all contacts
- Performing a lookup on the basic contact fields
- Performing a lookup on fields not in the menu
- Performing a right-click lookup

Performing special lookups

- Looking up contacts with a non-empty field value
- Looking up contacts with an empty field value
- Performing a greater than/less than lookup

Replacing, adding to, and narrowing lookups

- Replacing the current lookup
- Adding to a lookup
- Narrowing an existing lookup

Keyword searches

- Searching for a phrase

Contact List view

Using the Contact List view

- Sorting contacts in the Contact List view
- Searching for data in the currently-sorted field

Refining and creating lookups

- Performing a lookup of tagged contacts
- Omitting tagged contacts from the current lookup

Customizing the Contact List view

- Adding a column to the Contact List view
- Removing a column from the Contact List view
- Changing the column order

Integrating Microsoft Excel

- Exporting data to Microsoft Excel

Using groups

Creating and deleting groups

- Creating a group
- Creating a subgroup
- Deleting a group
- Renaming an existing group
- Converting a group to a company

Changing group membership

- Adding static members to a group
- Adding all selected contacts to a group
- Removing static members from a group
- Adding a dynamic group definition
- Saving the current lookup as a dynamic group

Working with groups

- Performing a lookup of all contacts in a group
- Viewing group membership for a single contact

Scheduling activities

Navigating the calendar views

- Viewing your calendar
- Using the Mini-calendar
- Filtering to show specific activities

Scheduling activities

- Scheduling an activity
- Editing an existing activity
- Rescheduling an activity
- Adding details to an existing activity
- Creating a reminder e-mail for activity participants
- Scheduling a private activity
- Scheduling a global event

Completing activities

- Clearing a completed activity
- Erasing an unneeded activity
- Recording a history of an unscheduled activity

Writing letters

Setting letter preferences

- Setting the default word processor

Creating template-based letters

- Writing a letter, memo, and fax cover page
- Writing custom template-based letters
- Creating a history of a letter sent

Printing envelopes

- Printing a standard envelope
- Creating an envelope template
- Editing an envelope template

Printing labels

- Printing labels for all contacts in Arizona
- Creating a non-standard label template

Using e-mail

Setting e-mail preferences

- Using Internet Mail as the default client
- Setting ACT! to work with Microsoft Outlook
- Creating an e-mail signature
- Setting e-mail composition options

Viewing e-mail in ACT!

- Checking for new messages
- Creating a new e-mail folder

Composing e-mail messages

- Composing a message to an ACT! contact
- Composing a message to a non-ACT! contact

Recording e-mail histories

- Setting the default e-mail history options
- Recording the history of a sent message

Internet integration

Internet integration

- Attaching a Web page to a contact
- Launching a Web site from a record

Accessing maps and driving directions

- Generating a map for a contact
- Generating driving directions

Running reports

Contact reports

- Running a Contact Report for the current contact
- Running a Contact Directory report
- Running a Phone List report
- Running a History Summary Classic report

Group and company reports

- Running a Group Membership report
- Running a Group List report
- Running a Company Summary report

Opportunity reports

- Running a Sales Analysis by Record Manager report
- Running an Opportunities by Record Manager report

Printing an Address Book

- Printing an Address Book on 8 1/2 x 11 paper

Course Information

Course Type: **Instructor Led Training**
Course Length: **Flex**
Prerequisites: **Windows XP Basic, or equivalent experience.**