

ACT! Advanced Training

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Course Outline

Advanced lookups and queries

Advanced queries

- Creating an advanced query
- Saving an advanced query
- Editing an existing query

Lookups by example

- Using the Lookup By Example feature
- Searching multiple fields
- Converting to an advanced query

Additional lookups

- Performing an annual events lookup
- Performing a contact activity lookup

Company lookups

- Performing a lookup on company fields
- Saving a lookup as a company

Group lookups

- Finding all contacts that are members of a group
- Finding a group by name
- Searching on group fields
- Saving a lookup as a group

Opportunity lookups

- Performing a lookup of all available opportunities
- Looking up a specific opportunity by name
- Looking up an opportunity by other fields
- Filtering the Opportunity List view

Performing a mail merge

Working with document templates

- Creating a document template
- Editing a document template

Personalizing document templates

- Inserting field placeholders
- Inserting a 'My Record' field placeholder
- Running a letter template for a single contact

Performing a mail merge

- Narrowing a lookup to ensure data is complete
- Performing a mail merge for the current lookup

Document and file management

The Documents tab

- Adding a document to the Documents tab
- Viewing an attached document
- Removing a document from the Documents tab

Attaching files

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

Sending mass e-mail messages

Working with e-mail templates

- Creating an e-mail template
- Editing an e-mail template

Performing a mass e-mail merge

- Looking up contacts with a non-empty E-mail field
- Sending a mass e-mail message
- Outlook integration

Specifying Outlook's ACT! settings

- Creating an ACT! Address Book in Outlook 2002/2003
- Setting default attachment options

Sending messages to ACT! contacts

- Sending an e-mail message to an ACT! contact
- Checking e-mail properties for an ACT! contact
- Specifying e-mail message history options

Sharing ACT! and Outlook activities

- Updating ACT! and Outlook activities
- Removing shared activities

Advanced activities

Using the Task List

- Filtering the Task List
- Editing an activity in the Task List
- Sorting the Task List
- Changing Task List columns

Managing activity types and priorities

- Creating an activity type
- Creating a custom activity priority

Managing resources

- Adding, editing, and removing a shared resource
- Checking resource availability
- Scheduling a resource

Working with multiple activities

- Scheduling an activity for multiple contacts
- Scheduling a recurring activity

Scheduling an activity series

- Creating an activity series template
- Editing an existing activity series template
- Scheduling an activity series

Workgroup calendar features

- Granting another user permissions for your calendar
- Viewing your meeting invitations

Setting activity preferences

- Setting your calendar preferences
- Setting your scheduling preferences

Printing a calendar

- Printing a standard calendar
- Using the Quick Print feature

Opportunity management

Viewing opportunities

- Filtering your opportunity list
- Looking up opportunities
- Customizing the columns in the Opportunity List
- Changing the name of an opportunity user field

Adding and removing opportunities

- Entering a new opportunity
- Editing an existing opportunity
- Closing an opportunity
- Deleting an opportunity

Generating quotes

- Writing a quote for an opportunity
- Editing a Word quote template

Exporting opportunities to Excel

- Exporting an opportunity list to Excel
- Viewing PivotTables and charts

Managing the opportunity process

- Creating an opportunity process
- Modifying an existing opportunity process
- Performing a lookup by opportunity stage

Maintaining a product list

- Adding new items to a centralized product list
- Modifying a product list
- Importing a product list

Course Information

Course Type: Instructor Led Training

Course Length: Flex

Prerequisites: ACT! Basic, Windows XP Basic, or equivalent experience.

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