

ACT! By Sage Professional Training



Private Training Dates: *please phone us on 0 2634 8899 to check current availability*

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ACT! Professional Introduction Training (1 Day)

Provides a solid foundation on the key principles of using ACT! Professional for new and inexperienced users

- **Introduction** - ACT! Screen Elements, Navigation Bar Menu, Icons and Tabs
- **Contact Record Basics** - Structure of a Contact Record, Data Entry Rules, Limit User access to Contacts*, Notes and History Tabs, Rich text formatting, Creating, Editing and Deleting Records
- **Locating Contacts** - The Lookup Menu, Lookup Variations, Contact List, Customizing Contact List View, Contact Tag Mode, Searching Secondary Contacts, Annual Events Tracker, Contact Activity, Keyword Searches, Creating A Look-up Query
- **Document Management** - Document attachments, Opening, editing and removing files
- **Reports** - Introducing ACT! Reports, Working with standard ACT! Reports, Opportunity information
- **Opportunity Management** - Creating Opportunities, Editing, closing and filtering opportunities, Producing standard sales reports
- **Activity and Calendar Management** - Creating Activities, Viewing Activities via Task Lists ACT! Calendars, Customizing the Work Week Calendar View, Availability Tab including Invitations and Resources Management*, Scheduling with multiple contacts, ACT! Activities integrated with Outlook
- **Working with ACT! e-mail** - Sending / receiving e-mails, Creating a contact record from incoming e-mail, Attaching e-mails to a Contact, Creating an activity from an e-mail, Basic e-mail merges
- **Writing Correspondence and Mail Merges** - Using ACT! to write letters, Creating ACT! letter templates, Mail merging to contacts, Using the ACT! menu within Microsoft Word, Printing labels and envelopes
- **Groups and Companies** - Creating and populating a Group or Company, Switching Group and Company View Bar, Collective Note, History, Activity and Sales Entries

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ACT! Professional Advanced Training (1 Day)

Designed for users who wish to extend their ACT! knowledge and use the database more fully as contact management and sales and marketing resource.

- **Management Overview of ACT! Opportunity Management** - Creating multiple opportunity processes, Producing ACT! Sales Reports, Viewing, filtering and sorting Opportunity Lists, Exporting Opportunity Lists to Excel, Generating Sales Opportunity Templates
- **Working with Multiple Contacts** - Writing Notes and Histories to multiple contacts, Attaching files to multiple contacts, Applying global changes to multiple contacts
- **Advanced Activity Scheduling** - Scheduling for other users, Granting Calendar access, Customizing Activity Types, Creating and amending an ACT! Activity Series, Creating and managing Activity Types, Defining Activity Priorities, Scheduling Activities for Multiple Users and Resources*, Scheduling Global Events, Integrating ACT! and Outlook calendars
- **Internet Services** - ACT! Internet Services menu options, Attaching web pages to Contacts
- **Using ACT! Professional Reports** - Running and filtering ACT! Professional reports, Using Company, Group and Opportunity reports, and Saving ACT! Reports and printing options
- **Performing Advanced Look-ups and Queries** - Creating a Look-up By Example, Performing and Saving Advanced Queries, Customizing the ACT! toolbar with saved queries
- **Working with ACT! Professional Templates** - Editing Microsoft Word templates, Customizing the ACT! menu with saved templates, Mail Merge options, Creating HTML templates , Performing email merges
- **Company and Group Records** - Managing Company and Groups Records, Creating Division and Sub-Group Records, Using static and dynamic Membership Rules, Applying changes to contact members
- **General Database Processes** - Using ACT! Import / Export Wizards, Setting ACT! Preferences, Defining Name preferences including Salutations, Understanding Record Ownership*



ACT! Professional Administrator Training (1 Day)

Providing ACT! administrators with the essential skills and knowledge to manage, maintain and customize their contact database. Delegates will have completed Introduction and Advanced level training or are experienced ACT! users.

- **Creating an ACT! Professional Database** -ACT! Professional Database creation, Setting up new ACT! Users and the 'My Record', Deleting and re-assigning ACT! Professional users, Understanding ACT! Security Roles, Creating, editing and managing 'ACT! Teams'*, Defining ACT! Preferences
- **ACT! Database Maintenance** - Scanning and removing Duplicate Records, Backing up an ACT! database, Restoring ACT! Data, Locking / Unlocking a database, Clearing old contact data, Key pointers for database performance and data, integrity
- **Importing / Exporting Data** - Using the ACT! Import wizards, Importing data from another application, Creating a data import map, Exporting ACT! data to other applications, Exporting a Contact List
- **Database Customization**- ACT! field options including memo fields, tick boxes and image fields, Defining ACT! fields including drop-down lists, Designing and customizing ACT! Layouts, Customizing ACT! Menus and Toolbars
- **ACT! Professional Network Configuration**- Understanding how ACT! Professional works on a network, How ACT! integrates with other applications e.g. Microsoft Word, Microsoft Excel and Microsoft Outlook, Locating program files and folders
- **Sharing ACT! data with Report Users**- Introducing ACT! database synchronization, Synchronization options, Performing database synchronization
- **ACT! Professional Report Templates**- Introduction to Report customization, Overview of advanced ACT! Report capacity using VB Scripting

* *Relevant to ACT! Professional for Workgroups only*