

## **ACT! 2012 – Advanced /Administrator Training Course**

*This one day course is designed to increase the delegate's knowledge of ACT! 2012 as a database administrator*

*By the end of this course delegates can expect to be able to use ACT! fully as a contact management software package and a sales and marketing tool. This course is suitable for Database Administrators.*

### **Working with multiple contacts within ACT!**

- *Making global changes to multiple contacts*
- *Writing Notes to multiple contacts*
- *Writing History to multiple contacts*
- *Attaching a file to multiple contacts*

### **Working with the ACT! 2012 Diary**

- *Scheduling activities to multiple contacts in the contact list*
- *Creating and scheduling activity series for multiple contacts*
- *Advanced use of the task list and calendars*
- *Scheduling activities for multiple users*
- *Synchronising ACT!, Outlook or Gmail calendars*
- *Meeting invites with icalendar*

### **Working with Smart Tasks**

- *Viewing and managing smart tasks*
- *Editing smart tasks*
- *Creating new smart tasks*
  - *Adding email step*
  - *Adding time delay*
  - *Scheduling an activity*
  - *Adding to Drip Campaign*

### **Working with Advanced Queries in ACT! 2012 Software**

- *Lookup By Example function*
- *Creating advanced queries*
- *Saving and re-using advanced queries*
- *Placing saved advanced queries on the tool bars*

### **Working with Groups and Companies in ACT! 2012**

- *Creating Companies*
- *Company management*
- *Setting up and running Company rules*
- *Group and sub-group creation*
- *Group management*
- *Setting up and running Group or sub-group rules*

### **Working with templates In ACT! 2012**

- *Creating Word templates in ACT! 2012*
- *Creating HTML templates in ACT! 2012 e-mail*
- *E-mail merging*

### **Working with reports In ACT! 2012**

- *Understanding ACT! reporting*
- *Set up Favourites*
- *Using the filters for Reports*
- *Using Group, Company and Opportunity Reports*
- *Saving, printing and e-mailing Reports*

### **Customizing the ACT! 2012 database**

- *Understanding system fields*
- *Working with layouts*
- *Creating fields and understanding data types*
- *Adding Custom fields*
- *Customizing and or editing existing layouts*
- *Customizing menus and toolbars*

### **Working with contact data**

- *Importing and exporting to and from ACT! 2012*
- *Exporting Contacts, Groups or Companies*
- *Exporting Opportunities information*

### **Managing Sales Opportunities in ACT! 2012**

- *Working with the Opportunity List*
- *Analyzing opportunities in Excel (optional)*
- *Importing a Product List*
- *Managing Opportunity Processes*
- *Opportunity Pipelines and Graphs*
- *Customizing Opportunities*

### **The Dashboard**

- *Understanding the Dashboard*
- *Editing the Dashboard view*
- *Creating new Dashboards*

### **Managing Database Users**

- *Adding a new user*
- *Creating passwords*



- *Adding Permissions*
- *Best practice for removing users*

#### **Database Maintenance**

- *Scanning for duplicates*
- *Setting reminders*
- *Clearing old Notes, Histories and Activities*
- *General Do's and Don'ts for database integrity*

#### **Customising the Web Info Tab**

#### **ACT! E-marketing (optional)**

- *Creating templates*
- *Preparing to send blast to lookups or groups*
- *Understanding the reports*
- *Creating surveys*
- *Drip Marketing*

