

ACT! 2012 Standard Training Course

This is a one day course designed to introduce the ACT! user to its basic functions.

By the end of this course, delegates can expect to be able to use the basic functions in ACT! confidently.

Familiarisation of ACT! 2012 Software

- *The Welcome Page*
- *Navigation Pane*
- *Context Specific tabs*
- *Screen Views*
- *Stacked Toolbars*
- *Filtering*
- *Column Headings*
- *Menus*
- *Icon Bar*
- *Groups view*
- *Companies view*
- *Opportunities view*
- *Universal Search*

Working with contacts in ACT! 2012

- *Creating new Contacts*
- *Duplicating Contacts*
- *Editing existing contact information*
- *Deleting Contacts*
- *Entering Notes*
- *Entering History*
- *Attaching Documents and Files to History*
- *Scheduling activities with contacts*

Working with activities in ACT! 2012

- *Viewing and filtering activities in the contact view*
- *Viewing and filtering activities in the task list view*
- *Viewing and filtering activities in the calendars*
- *Clearing activities in all three views*
- *Sending invites via iCalendar*

Introduction to Sales Opportunities in ACT! 2012

- *Creating a new opportunity*
- *Editing opportunities*
- *Closing a sale -won or lost*
- *Running basic opportunity reports*

Using the contact list in ACT!

- *Changing the view of the contact list*
- *Finding contacts with the contact list*
- *Using Tag mode in the contact list*
- *Editing contact information in the contact list*

Searching the ACT! Database

- *Using the look-up menu to search for contacts*
- *Adding to look-ups*
- *Narrowing Look-ups*
- *Key-word search*
- *Universal Search Wildcards*

Introduction to mail merging in ACT!

- *Writing a letter, fax or memo to a contact through ACT!*
- *Mail merging to a look-up*
- *Printing labels and envelopes through ACT*

Introduction to e-mailing in ACT! 2012

- *Sending an e-mail to a contact*
- *Attaching e-mails to the contact notes*
- *Viewing e-mails through ACT!*
- *Creating a contact from an email*
- *Attaching emails to contacts from Outlook*
- *Creating an ACT! Activity from Outlook*

Working with the Scratchpad

ACT! E-marketing (optional)

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

Let us know if you want to cover other features not on this list, we're always flexible and will create a course just for you.

