

ACT! 2009 – Advanced /Administrator Training Course

This one day course is designed to increase the delegate's knowledge of ACT!

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! 2009 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*
- *Copying activities from ACT! to Outlook calendars*

Working with Advanced Queries in ACT! 2009 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! 2009

- *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! 2009

- *Creating Word templates in ACT! 2009*
- *Creating HTML templates in ACT! 2009 e-mail*
- *E-mail merging*

Working with reports In ACT! 2009

- *Understanding ACT! reporting*



- *Using the filters for Reports*
- *Using Group, Company and Opportunity Reports*
- *Saving, printing and e-mailing Reports*

Customizing the ACT! 2009 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! 2009*
- *Exporting Contacts, Groups or Companies*
- *Exporting partial contact information*

Managing Sales Opportunities in ACT! 2009

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

The Dashboard

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

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*
- *Setting reminders*
- *General Do's and Don'ts for database integrity*

