

## ACT! 2010 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! 2010 Software

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

### Working with contacts in ACT! 2010

- 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! 2010

- 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
- Send invites via iCalendar

### Introduction to Sales Opportunities in ACT! 2010

- 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*

### **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! 2010**

- *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*

### **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.**

