

ACT!

Duration: 1 Day

This comprehensive one-day ACT! training course has been designed to give first time or recent users the skills they need to manage their Contacts, time and sales progress.

The modules presented on the course will introduce a new user to the basic principles of using ACT! and remind existing users of the major features and facilities to be found within the product. Delegates will gain confidence in the use of ACT! during the course via hands on practice and examples.

Course Objectives:

This ACT! training course will provide a solid foundation in the principles of using the ACT! software for your organisation's specific business requirements.

Course Content:

Getting Started

- Starting ACT! for Windows
- Viewing a contact database

Creating a Contact Database

- Creating a contact database
- Editing a contact database
- Printing an address book

Locating Contacts

- Finding contacts
- Viewing contacts
- Sorting contacts

Organizing Contacts

- Categorizing contacts
- Grouping contacts
- Managing contact groups

Scheduling Activities

- Scheduling activities in the Contact window
- Managing activities
- Scheduling recurring activities
- Creating sales opportunities

Working with Activities in other Act! Windows

- Working in the calendar windows
- Working in the Task List Window
- Using SideAct! to manage notes and activities

Creating Documents with the ACT! Word Processor

- Creating a letter
- Formatting documents
- Viewing other templates

Prerequisites:

- A working knowledge of the Windows environment