

Fundamentals

ACT! 6.0 Course Outline

Working with Contacts

Opening ACT!

- ◆ Opening ACT! from the Start Menu
- ◆ Opening ACT! from the Desktop
- ◆ Creating a New Database
- ◆ Opening a Database

The ACT! Interface

- ◆ Identifying Key Elements of the ACT! Interface

Launching ACT!'s Views

- ◆ Setting View Bar Options
- ◆ Launching the Contact View
- ◆ Launching the Contact List View
- ◆ Launching the Groups View
- ◆ Launching the Task List
- ◆ Launching the Daily Calendar
- ◆ Launching the Weekly Calendar
- ◆ Launching the Monthly Calendar
- ◆ Launching the Email View
- ◆ Launching the Internet Services View

Launching Contact View Tabs

- ◆ Launching the Contact View Tab

The My Record

- ◆ Find and Correct the My Record

Creating & Deleting Contacts

- ◆ Inserting a Contact
- ◆ Duplicating a Contact
- ◆ Deleting Contacts

Understanding Names & Salutations

- ◆ Specifying a Contact's First & Last Names
- ◆ Setting Names Preferences

Entering Notes for a Contact

- ◆ Inserting a Note for a Contact

Attaching Files to a Contact

- ◆ Attaching a File to a Contact Record
- ◆ Viewing an Attached File

Basic Lookups

Simple Lookups

- ◆ Looking Up All Contacts
- ◆ Looking Up on Basic Fields
- ◆ Looking Up on Other Fields

Looking Up Empty/Non-Empty Fields

- ◆ Looking up Empty Fields
- ◆ Looking Up Non-Empty Fields

Replacing/Adding/Narrowing Lookups

- ◆ Replacing a Lookup
- ◆ Adding to a Lookup
- ◆ Narrowing a Lookup

Annual Events Lookups

- ◆ Looking Up Annual Events

Contact Activity Lookups

- ◆ Looking Up Modified Contacts

Keyword Searches

- ◆ Searching for a Specific Keyword
- ◆ Keyword Searching Email Addresses

Lookups By Example

- ◆ Searching for a Field Value
- ◆ Searching for Multiple Field Values
- ◆ Using Query Operators in a Lookup By Example

Using the Contact List View

Contact List View Basics

- ◆ Launching the Contact List View
- ◆ Sorting Contacts

Customizing the Contact List View

- ◆ Adding Columns
- ◆ Removing Columns
- ◆ Rearranging Columns
- ◆ Splitting the Contact List View

The Edit Mode

- ◆ Switching to the Edit Mode
- ◆ Using the Edit Mode

The Tag Mode

- ◆ Switching to the Tag Mode
- ◆ Building a Lookup in the Tag Mode
- ◆ Refining a Lookup in the Tag Mode

Using Groups

Creating Groups

- ◆ Creating a Group
- ◆ Creating a Subgroup
- ◆ Deleting Groups or Subgroups
- ◆ Renaming an Existing Group

Changing Group Membership

- ◆ Adding Contacts to a Group
- ◆ Removing Contacts from a Group
- ◆ Adding the current lookup to a Group
- ◆ Changing Group Membership in the Contact View

Looking Up Contacts in a Group

- ◆ Looking Up Group Members from the Contact View
- ◆ Viewing Group Members in the Groups View

Defining Group Rules

- ◆ Defining Field Values Rules
- ◆ Defining Saved Query Rules
- ◆ Running Group Rules

Scheduling Activities

Navigating the Calendar Views

- ◆ Viewing the Daily Calendar
- ◆ Viewing the Weekly Calendar
- ◆ Viewing the Monthly Calendar
- ◆ Using the Mini Calendar
- ◆ Filtering the Calendar

Scheduling Activities

- ◆ Scheduling an Activity
- ◆ Editing an Existing Activity
- ◆ Rescheduling an Activity



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Completing Activities

- ◆ Clearing an Activity
- ◆ Erasing an Activity
- ◆ Recording a History of an Unscheduled Activity

Using the Task List

- ◆ Editing Activities in the Task List
- ◆ Sorting the Task List
- ◆ Changing Task List Columns
- ◆ Filtering the Task List

SideACT!

Using SideACT!

- ◆ Launching SideACT!
- ◆ Adding an Activity to SideACT!
- ◆ Completing a SideACT! Activity
- ◆ Printing the SideACT! List

Transferring SideACT! Activities

- ◆ Transferring an Activity from SideACT! to ACT!

SideACT! Alarms

- ◆ Configuring SideACT! Alarms

Sales/ Opportunities

Adding Opportunities

- ◆ Entering a New Opportunity
- ◆ Editing an Existing Opportunity

Completing an Opportunity

- ◆ Completing an Opportunity
- ◆ Deleting an Opportunity

Viewing Opportunities

- ◆ Viewing Opportunities for a Contact
- ◆ Viewing Opportunities for a Group of Contacts

Managing the Sales Process

- ◆ Modifying Sales Stages
- ◆ Looking Up Contacts by Sales Stage

Running Sales Reports

- ◆ Running Sales/Opportunity Reports
- ◆ Filtering Opportunity Reports
- ◆ Running Sales Graphs
- ◆ Running Sales Pipeline

Library Tab

Adding Documents

- ◆ Adding a Document to the Library Tab

Viewing Documents

- ◆ Viewing Documents in the Library Tab

Editing Documents

- ◆ Editing a Library Tab Document

Mapping ACT! Fields to Excel Spreadsheets

- ◆ Mapping ACT! Fields to Excel

Internet Features

Internet Services

- ◆ Viewing a Web Page in ACT!
- ◆ Launching Web Sites in URL Fields

Attaching Web Pages to Contacts

- ◆ Attaching a Web Page to a Contact
- ◆ Viewing an Attached Web Page

Writing Letters

Setting Letter Preferences

- ◆ Setting Word Processor Preferences

Writing a Template-Based Letter

- ◆ Writing Letters, Memos, and Fax Cover Pages
- ◆ Writing Other Template-Based Letters
- ◆ Creating a History of a Letter Sent

Printing Envelopes

- ◆ Printing Standard Envelopes
- ◆ Creating Envelope Templates
- ◆ Editing Envelope Templates

Printing Labels

- ◆ Printing Standard Avery Labels
- ◆ Creating Non-Standard Label Templates

Viewing & Composing Email

Setting Email Preferences

- ◆ Setting Email Preferences

Viewing Email in ACT!

- ◆ Checking Your Messages
- ◆ Creating New Email Folders
- ◆ Moving Messages Into a Folder

Composing an Email in ACT!

- ◆ Composing a Message to an ACT! Contact
- ◆ Composing a Message to a Non-ACT! Contact

Writing Reports

Writing Reports

- ◆ Writing a Contact Report
- ◆ Writing a Notes/History Report
- ◆ Writing an Activities/Time Spent Report

Filtering a Report

- ◆ Filtering an Activities Report
- ◆ Filtering a Notes/History Report

Course Prerequisites:

Students should have functional knowledge of the Microsoft Word and the Windows operating system. No prior ACT! knowledge is required for this course.