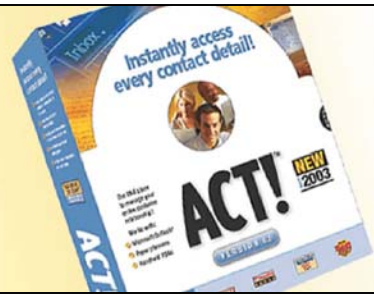


Powerusers

ACT! 6.0 Course Outline



ACT! / Outlook Integration

Setting Outlook's ACT! Settings

- ◆ Creating an ACT! Address Book in Outlook
- ◆ Setting Default Attachment Options

Sending Emails to ACT! Contacts

- ◆ Sending an Email to an ACT! Contact
- ◆ Checking Email Properties for an ACT! Contact
- ◆ Specify Message History Options

Attaching Existing Outlook Messages to ACT! Contacts

- ◆ Attaching a Single Email to an ACT! Contact
- ◆ Attaching Multiple Emails to an ACT! Contact

Sharing ACT! and Outlook Calendars

- ◆ Update ACT! and Outlook Activities
- ◆ Filter Outlook Activities on the ACT! Calendar
- ◆ Remove Shared ACT!/Outlook Activities

Importing Outlook Data into ACT!

- ◆ Importing Data from Outlook into ACT!

Editing Letter Templates

Creating Letter Templates

- ◆ Creating a Letter Template from Scratch
- ◆ Editing an Existing Letter Template

Working with Letter Templates

- ◆ Using the Mail Merge Fields Dialog Box
- ◆ Understanding the Hidden Link in Word
- ◆ Testing Letter Templates
- ◆ Adding Templates to the Write Menu

Using the ACT! Word Processor

- ◆ Configuring Page Setup Options
- ◆ Formatting Text
- ◆ Formatting a Paragraph
- ◆ Setting Tabs
- ◆ Spell Checking a Document

Mail Merging

Preparing for a Mail Merge

- ◆ Determining the Recipients
- ◆ Ensuring Good & Complete Data

Sending a Mail Merge

- ◆ Using the Mail Merge Wizard
- ◆ Printing Letters & Creating a Letter Sent History

Editing Graphical Mail Templates

Working with Graphical Mail Templates

- ◆ Creating a Graphical Mail Template
- ◆ Editing an Existing Graphical Mail Template

Formatting Graphical Mail Templates

- ◆ Formatting Basic Text
- ◆ Inserting Email Merge Field Placeholders
- ◆ Inserting an Image
- ◆ Adding Hyperlinks to a Template
- ◆ Spell Checking a Graphical Mail Template

Sending Mass Emails

Preparing for an Email Merge

- ◆ Determining Email Merge Recipients

Sending a Mass Email

- ◆ Performing a Mail Merge

Advanced Activities

Setting Activity Attributes

- ◆ Setting General Activity Properties
- ◆ Adding Activity Details
- ◆ Automatically Creating an Email for Activity Participants
- ◆ Scheduling a Private Activity

Working with Multiple Activities

- ◆ Scheduling an Activity for Multiple Contacts
- ◆ Scheduling a Recurring Activity

Scheduling an Activity Series

- ◆ Creating an Activity Series
- ◆ Editing an Activity Series
- ◆ Scheduling an Activity Series

Setting Activity Preferences

- ◆ Setting Calendar Preferences
- ◆ Setting Scheduling Preferences

Printing the Calendar

- ◆ Printing a Standard Calendar
- ◆ Setting Print Calendar Options

Advanced Lookups & Queries

Advanced Queries

- ◆ Looking Up By Example
- ◆ Converting a Lookup By Example to an Advanced Query
- ◆ Learning ACT!'s Query Syntax
- ◆ Using ACT!'s Query Operators

Saving Advanced Queries

- ◆ Saving an Advanced Query
- ◆ Editing an Existing Query
- ◆ Adding Saved Queries to the Menu



Advanced Groups

Using Groups as Accounts

- ◆ Using Group Fields
- ◆ Adding Group Fields and Editing Group Layouts

Group Notes & Histories

- ◆ Associating Notes & Histories With a Group
- ◆ Viewing Notes & Histories Associated with a Group
- ◆ Viewing All Notes & Histories for Group Members

Group Activities

- ◆ Associating Activities with a Group
- ◆ Viewing Activities Associated with a Group
- ◆ Viewing All Activities for Group Members

Group Sales/Opportunities

- ◆ Associating Sales/Opportunities With a Group
- ◆ Viewing Sales/Opportunities Associated with a Group
- ◆ Viewing all Sales/Opportunities for Group Members

Attaching Documents to a Group

- ◆ Adding Documents to the Group Library Tab
- ◆ Viewing Documents in the Library Tab

Macros & Interface Customization

Automating Tasks with Macros

- ◆ Recording a Macro
- ◆ Running a Macro

Menu & Toolbar Customization

- ◆ Creating a Custom Command
- ◆ Adding a Command to the Menu
- ◆ Adding a Command to the Toolbar
- ◆ Creating a Custom Keyboard Shortcut

Customizing Internet Links

- ◆ Adding Driving Directions
- ◆ Running Driving Directions or Maps

Designing Reports

Creating a Report Template

- ◆ Creating a Report Template from Scratch
- ◆ Editing an Existing Report Template

Adding Sections to a Report

- ◆ Viewing Sections in a Report
- ◆ Adding a Section to a Contact Report
- ◆ Adding a Summary Section
- ◆ Resizing a Section
- ◆ Specifying Section Options

Adding Fields to a Section

- ◆ Adding Detail Fields
- ◆ Adding Summary Fields
- ◆ Adding System Fields

Adding Objects to a Section

- ◆ Adding Lines & Shapes
- ◆ Adding Text Objects
- ◆ Adding Graphics to a Report

Working with Objects

- ◆ Editing Object Properties
- ◆ Changing Text & Field Attributes
- ◆ Aligning Objects
- ◆ Making Objects the Same Size
- ◆ Changing the Order of Objects

Setting Filter Settings

- ◆ Setting General Filter Settings
- ◆ Setting Activity & Notes/History Filter Settings
- ◆ Setting Sales/Opportunity Filter Settings

Testing Reports

- ◆ Running a Report

Database Maintenance

Routine Maintenance

- ◆ Backing Up Your Database
- ◆ Compressing & Reindexing
- ◆ Setting Maintenance Reminders

Dealing with Duplicates

- ◆ Scanning for Duplicates

Mass Updating Fields

- ◆ Changing the Value of a Field for Multiple Contacts
- ◆ Swapping Fields
- ◆ Copying Fields

Additional ACT! Resources

ACT! Add-On Products

- ◆ Searching for ACT! Add-Ons

Using the ACT! Knowledge Base

- ◆ Searching the ACT! Knowledge Base

Course Prerequisites:

Students should have completed the ACT! Fundamentals course or should have equivalent knowledge. A functional knowledge of Microsoft Word, Microsoft Outlook, and the Windows operating system is also required.