



ACT! Power User Class

Who should take this course?

Anyone who wants ACT! to be more than just an expensive rolodex. It's a course for beginners and longtime users.

We go through the basic feature sets of ACT! Then we show you how to use the program for productivity and efficiency to automate your processes and increase your sales. We go through combining features in ACT! so you can operate ACT! the way you do business.

Course Description

Working with Contacts

The ACT! Interface

- Identifying Key Elements of the ACT! Interface

Launching ACT!'s Views

- Setting View Bar Options

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

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

Mass Updating Fields

Changing the Value of a Field for Multiple Contacts

- Swapping Fields
- Copying Fields

Manipulating List Views

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



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

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

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

Advanced Scheduling

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

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

Creating Document Templates

- Creating a Document Template from Scratch
- Editing Existing Document Templates

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
- 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
- Composing an Email in ACT!
- Composing a Message to an 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

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