



ACT! by SAGE Premium for Workgroups 2009 Course Agenda

Level One	Level Two
<p>Working with Contacts</p> <p>The ACT! Interface</p> <p>Launching ACT!'s Views</p> <p>Launching Contact View Tabs</p> <p>The My Record</p> <p>Creating & Deleting Contacts</p> <ul style="list-style-type: none">• Inserting a Contact• Duplicating a Contact• Deleting Contacts <p>Understanding Names & Salutations</p> <ul style="list-style-type: none">• Specifying a Contact's First & Last Names• Setting Names Preferences <p>Entering Notes for a Contact</p> <p>Attaching Files to a Contact</p> <p>Lookups</p> <p>Simple Lookups</p> <p>Replacing/Adding/Narrowing Lookups</p> <p>Annual Events Lookups</p> <p>Contact Activity Lookups</p>	<p>Sales/ Opportunities</p> <p>Adding Opportunities</p> <ul style="list-style-type: none">• Entering a New Opportunity• Editing an Existing Opportunity <p>Completing an Opportunity</p> <p>Viewing Opportunities</p> <ul style="list-style-type: none">• Viewing Opportunities for a Contact• Viewing Opportunities for a Group of Contacts <p>Running Sales Reports</p> <ul style="list-style-type: none">• Running Sales/Opportunity Reports• Filtering Opportunity Reports• Running Sales Graphs• Running Sales Pipeline <p>Advanced Scheduling</p> <p>Working with Multiple Activities</p> <ul style="list-style-type: none">• Scheduling an Activity for Multiple Contacts• Scheduling a Recurring Activity <p>Scheduling an Activity Series</p> <ul style="list-style-type: none">• Creating an Activity Series• Editing an Activity Series



Searching the Database

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

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
- Refining a Lookup in the Tag Mode

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



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

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

Using Groups & Companies

Creating Groups & Company's

- Creating a Group/Company
- Creating a Subgroup/Divisions
- Deleting Groups or Company's

Changing Group/Company Membership

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

Looking Up Contacts in a Group/Company

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