

ACT! 2008 Introductory Training Course

This is a half day course designed to provide new ACT! users with an entry-level understanding of the basic features of the software. On completion of this session delegates can expect to be able to use ACT! basic functions confidently, on a day to day basis.

Content Summary:

Introduction to ACT! Screen navigation, menus, icons and tabs.

Contacts: Create new Contacts, amend and delete Contact records.

Search for a Contact or group of Contacts (using lookups).

Companies: Create and amend Company records, associate Contacts with Companies; understand Company record structure.

Groups: Create and amend Group records. Consider examples of the application of Groups.

Calendar: Working with the Calendar including synchronisation with Microsoft Outlook.

Activities: Creating activities and scheduling Appointments, Calls, To-Do's etc. Working with Activity Series and Alarms

Email: Working with Outlook email; creating Contacts from emails and linking emails to Contact records.

Opportunities: Creating and managing Sales Opportunities. Sales process creation and management and quotation generation.

Documents: Letters and templates. Creating mail merges based on existing ACT! templates.

Reports: Using ACT!'s standard reports, filtering and exporting reports through a multitude of media.

Please find your ACT! Introductory course notes attached.

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