

## ACT! 6.0 Training Courses

### One Day Course – Introduction to ACT!

**Objective:** To provide new ACT! users with an entry-level understanding of the basic features of the software. On completion of the session, users will be able to navigate successfully around the system and use features appropriate to 'standard' level access.

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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).
- **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 the ACT! Email client; Synchronisation with Outlook email.
- **Opportunities:** Creating and managing Sales Opportunities.
- **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.

The session is run on an informal interactive 'workshop' style basis and includes exercises to establish that delegates are able to articulate each component of the course. There will be plenty of opportunity for discussion and questions and answers.

**n.b.** Please note that the above session may be run as a half day course. In these circumstances, an overview of each element will be provided but there will be no workshop activity or 'exercises'. There will be limited opportunity for discussion and Q and A at the conclusion of the session

## ACT! 6.0 Training Courses

### One Day Course – Advanced ACT!

**Objective:** To enable existing ACT! users to extend their knowledge of the system. On completion of this session, users will be able to configure some of the more complex elements of ACT! themselves, increasing the benefit that the solution can bring to their businesses.

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Content summary:

- **Multiple contacts:** Amending groups of Contact records, applying global changes.
- **Advanced Searches:** Performing advanced Lookups and Queries to create groups of finely targeted Contacts.
- **Document templates:** Basic editing of document templates for mail merges.
- **Report templates:** Basic editing of report templates to customise output to meet specific needs.
- **Import and export:** Understanding the database and how to import records from other packages and output data for exchange with third party application. Understanding field mapping and duplication checking.

The session is run on an informal interactive 'workshop' style basis and includes exercises to establish that delegates are able to articulate each component of the course. There will be plenty of opportunity for discussion and questions and answers.

**n.b.** Please note that the above session may be run as a half day course. In these circumstances, an overview of each element will be provided but there will be no workshop activity or 'exercises'. There will be limited opportunity for discussion and Q and A at the conclusion of the session