

ACT!: LEVEL 1

Available Dates: **Request Dates**

Class Length: **1 day**

Cost: **\$399**

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Class Outline:

Description:

This ILT Series course, rated 4.9/5.0 in overall quality by ProCert Labs, teaches the basic features and functions of ACT! 2007. Students will learn how to create and edit records for contacts, companies, and groups. They will also learn how to perform lookups to locate records that meet specified criteria. Students will use the calendar to schedule activities, and they will work with letter-writing, e-mail, and printing features to correspond with contacts. Finally, students will attach Web pages to contact records and use the Web to generate maps and driving directions. Comes with CertBlaster pre- and post-assessment software (download).

Prerequisites: Windows XP: Basic, or equivalent experience

Unit 1 : Getting started

Topic A: 0 Introducing ACT!

A-1: Starting ACT!

A-2: Examining the ACT! window

Topic B: 0 Navigation

B-1: Using database navigation techniques

B-2: Locating specific data

Topic C: 0 Closing databases

C-1: Closing a database and closing ACT!

Unit 2 : Working with contacts

Topic A: 0 My Record

A-1: Looking up My Record

Topic B: 0 Creating and deleting contacts

B-1: Adding a new contact to the database

B-2: Duplicating an existing contact

B-3: Permanently deleting a contact

B-4: Deleting multiple contacts in one step

Topic C: 0 Secondary contacts

C-1: Adding a secondary contact

C-2: Editing and deleting a secondary contact

C-3: Promoting a secondary contact

Topic D: 0 Names and salutations

D-1: Specifying a contact's first, middle, and last names

D-2: Setting name preferences

D-3: Updating the salutation for multiple contacts

Topic E: 0 Inserting notes

E-1: Inserting a note for a contact

E-2: Inserting a note for multiple contacts

Topic F: 0 Attaching files to a contact

F-1: Attaching a file to a contact record

F-2: Launching and viewing an attached file

Unit 3 : Companies and divisions

Topic A: 0 Adding and removing companies

A-1: Adding a new company record

A-2: Deleting a company record

Topic B: 0 Managing companies

B-1: Associating a contact with a company

B-2: Updating address data automatically

Topic C: 0 Managing divisions

C-1: Adding a new division

C-2: Adding contacts to a division record

Unit 4 : Simple lookups

Topic A: 0 Performing simple lookups

A-1: Performing a lookup on the basic contact fields

A-2: Performing a lookup on fields not in the menu

A-3: Performing a right-click lookup

Topic B: 0 Special lookups

B-1: Looking up contacts with a non-empty value

B-2: Looking up contacts with an empty value

B-3: Performing a greater than/less than lookup

Topic C: 0 Modifying lookups

C-1: Replacing the current lookup

C-2: Adding criteria to a lookup

C-3: Narrowing an existing lookup

Topic D: 0 Keyword searches

D-1: Searching for a phrase

Unit 5 : Contact List view

Topic A: 0 Using Contact List view

A-1: Sorting contacts in Contact List view

A-2: Searching for data in the currently sorted field

Topic B: 0 Lookups in Contact List view

B-1: Performing a lookup of tagged contacts

B-2: Omitting tagged contacts from the current lookup

Topic C: 0 Customizing Contact List view

C-1: Adding a column to Contact List view

C-2: Removing a column from Contact List view

C-3: Changing the column order

Topic D: 0 Integrating Microsoft Excel

D-1: Exporting data to Microsoft Excel

Unit 6 : Groups

Topic A: 0 Creating and deleting groups

A-1: Creating a group

A-2: Creating a subgroup

A-3: Deleting a group

A-4: Renaming an existing group

A-5: Converting a group to a company

Topic B: 0 Changing group membership

B-1: Adding static members to a group

B-2: Adding all selected contacts to a group

B-3: Removing static members from a group

B-4: Adding a dynamic group definition

B-5: Saving the current lookup as a dynamic group

Topic C: 0 Working with groups

C-1: Performing a lookup of all contacts in a group

C-2: Viewing group membership for a single contact

Unit 7 : Activities

Topic A: 0 Calendar views

A-1: Viewing your calendar

A-2: Using the Mini-calendar

A-3: Filtering to show specific activities

Topic B: 0 Scheduling activities

B-1: Scheduling an activity

B-2: Editing an existing activity

B-3: Rescheduling an activity

B-4: Adding details to an existing activity

B-5: Creating a reminder e-mail for activity participants

B-6: Scheduling a private activity

B-7: Scheduling a global event

Topic C: 0 Completing activities

C-1: Clearing a completed activity

C-2: Erasing an unneeded activity

C-3: Recording a history of an unscheduled activity

Unit 8 : Letters

Topic A: 0 Letter preferences

A-1: Setting the default word processor

Topic B: 0 Template-based letters

B-1: Writing a letter, memo, and fax cover page

B-2: Writing custom template-based letters

B-3: Creating a history of a letter sent

Topic C: 0 Envelopes

C-1: Printing a standard envelope

C-2: Creating an envelope template

C-3: Editing an envelope template

Topic D: 0 Labels

D-1: Previewing labels for contacts in the current lookup

D-2: Creating a non-standard label template

Unit 9 : E-mail with Outlook

Topic A: 0 E-mail preferences

A-1: Setting ACT! to work with Microsoft Outlook

A-2: Configuring an ACT! Address Book in Outlook

Topic B: 0 Composing e-mail messages in ACT!

B-1: Composing a message from within Outlook

B-2: Composing a message from within ACT!

B-3: Composing a template-based e-mail

Topic C: 0 Recording e-mail histories

C-1: Setting e-mail history options in Outlook

C-2: Recording the history of a sent message

Unit 10 : ACT! and the Internet

Topic A: 0 Web integration

A-1: Attaching a Web page to a contact

A-2: Launching a Web site from a record

Topic B: 0 Maps and driving directions

B-1: Generating a map for a contact

B-2: Generating driving directions

Unit 11 : Reports

Topic A: 0 Contact reports

A-1: Running a Contact report for the current contact

A-2: Running a Contact Directory report

A-3: Running a Phone List report

A-4: Running a History Summary Classic report

A-5: Running an Activities report

Topic B: 0 Group and company reports

B-1: Running a Group Membership report

B-2: Running a Group List report

B-3: Running a Company Summary report

Topic C: 0 Opportunity reports

C-1: Running a Sales Analysis by Record Manager report

C-2: Running an Opportunities by Record Manager report

Topic D: 0 Printing an address book

D-1: Printing an address book on letter-size paper