



Computer Consultants Corporation

ACT!

Introduction

Length of course: One class day (6 hours)

Objective(s): This course is an end user introduction to the ACT! CRM software. Students will learn how to enter and manage contact information, build schedules, prepare printed and email documents, use ACT!'s sales forecasting and tracking tools, and generate basic reports.

Prerequisites: Familiarity with Microsoft Windows.

Getting Started

- Creating/Opening a database
- The ACT! User Interface
- Working with views

Creating and Grouping Contacts

- Creating a contact
- Adding notes and files to a contact
- Creating groups
- Adding contacts to groups
- Importing contact information from Excel

Managing Contacts

- Introducing Lookups
- Searching and sorting contacts
- Using the contact list view
- Using tag mode to select multiple contacts
- Editing or deleting multiple contacts at once

Using ACT! Scheduling

- Scheduling activities on your calendar
- Sharing your calendar
- Scheduling activities for other users
- View and manage your calendars
- Adding tasks to the task list
- Schedule activities with contacts
- Finding all activities related to a specific contact
- Printing calendars and activity reports

Using the Word Processor

- Setting up the ACT! word processor
- Using Microsoft Word
- Addressing a letter to a contact
- Creating a mail merge to multiple contacts
- Saving mail merges

Using ACT! Email

- Configuring the ACT! email client
- Configuring Microsoft Outlook
- Performing a mail merge for emails
- Creating new email templates

Using ACT!'s Sales Tools

- Entering and editing sales opportunities
- Viewing opportunities for individuals or groups
- Creating sales reports and graphs
- Using sales forecast and pipeline tools

Generating Reports

- Brief description of built-in reports
- Generating a report for all contacts
- Generating a report based on a lookup
- Exporting sets of contacts to other programs