bigblue marketing

Sage ACT! Software Training Course

Level 1 – One Day

Training <u>your</u> people, with <u>your</u> database at <u>your</u> premises. It doesn't get better than that!

Email: jeff@bigbluemarketing.co.uk
Web: www.bigbluemarketing.co.uk
Call: 0845 603 6755

<u>Course Contents – Feel free to highlight the areas of most interest to you!</u>

- What can ACT! do for me?
    - Organising your contacts
    - Organising yourself
    - ACT! as a Sales and Marketing tool
- Creating a new database
    - Starting from scratch
    - Upgrading from a previous version
    - Importing existing data
    - Getting help!
- The Main Contact Screen
    - Toolbars
    - Navigation Bar
    - Upper Screen Contents
    - Lower Screen Contents
    - Tabs
    - Layout Button
    - Contact List View
- Working With Contacts
    - Creating new contacts
    - Creating another contact in the same company
    - Editing contact information
    - Deleting contacts
    - Adding Notes and Histories to Contacts
    - Attaching documents to contact records
- Using the Contact List View
    - Changing columns in list view
    - Finding and sorting contacts in list view
    - Using Tag Mode to select or deselect contacts
    - Exporting to Excel
- Finding People and Things in ACT!
    - Using Look-Ups to search the database
    - Adding to Look-ups
    - Narrowing Look-ups
    - Special Look-ups
    - Queries
    - Key-Word Search
- Finding Additional Information about Contacts – Web Info
    - The Web Info Tab
    - Examples of Web Information
    - To Create a new Link
    - Links to folders

sage Business Partner

Swiftpage E SILVER Drip Marketing Certified Consultant

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- Companies
  - Creating Companies
  - Creating Divisions
  - Adding Contacts to Companies
  - Linking Contacts and Companies
  - Adding Notes and Histories to Companies
- Groups
  - Creating Groups
  - Creating Sub-Groups
  - Adding Contacts to Groups
  - Viewing Groups
- Scheduling Activities
  - Scheduling Meetings, Calls & To-Dos
  - Clearing completed activities.
  - Viewing the Task List
  - Viewing Tasks in the Calendar
  - Creating Custom Activities
- Smart Tasks (New in ACT! 2011)
  - Creating Smart Tasks
  - Editing Smart tasks
  - Smart Task Examples
- Working With Sales Opportunities
  - Creating a New Sales Opportunity
  - Recording information for Marketing
  - Managing the Sales Pipeline
  - Customising the Sales Pipeline
  - Winning or Losing the Sale
  - Sales Forecasting
  - Exporting your Sales Forecast to Excel
- Working with Dashboards (New in ACT 2008!)
  - Using Dashboards for reporting
  - Activity Dashboards
  - Opportunity Dashboards
  - Filtering data
  - Creating new Dashboards

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- Communicating with People
  - Writing a Letter, Fax or Memo
  - Using Letter Templates
  - Creating your own templates
  - Running a Mail-Merge to a group of Contacts
  - Printing Labels and Envelopes
  - Writing an E-Mail
  - Attaching E-Mails to the Contact
  - Sending bulk E-Mails
- Outlook Integration
  - Sending E-Mails through Outlook
  - Receiving E-Mails through Outlook
  - Recording E-Mails in ACT! Contact History
  - Setting up an ACT! Address Book in Outlook
  - Creating a new ACT! Contact from an Outlook E-Mail - even if ACT! is closed!
  - Sharing Calendar information between ACT! and Outlook
  - Synchronising Contacts with Outlook (ACT 2011)
- Database Maintenance
  - Check and Repair your database
  - Backing-Up your database
  - Where to get Help and Support

Typically, we aim to be on site between 09:00 and 09:30 so we can be set up and ready for a 10:00 am start. We normally wind up around 4:00 pm, with the usual breaks for coffee and lunch.