

ACT! Software Training Course



Level 1 – One Day Training for Act! Users

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

Email: jeff@bigbluemarketing.co.uk

Web: www.bigbluemarketing.co.uk

Call: 0845 603 6755

Course Contents – Feel free to highlight the areas of most interest to you!

- 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



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- 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
- 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



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- Working With Sales Opportunities
 - Creating a New Sales Opportunity
 - Creating a Quotation
 - 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

- 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



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- Useful Add-on Applications
 - Reporting
 - Quotations
- 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.

Feel free to request any special topics you would like more information on during your training day. It's your day, and I will do all I can to accommodate your wishes!

For an informal chat just give me a call. I'd love to hear from you.

Jeff Granger
Big Blue Marketing

0845 603 6755

