



Becoming an ACT! POWER USER

The Basics

- What's Contact Management Software?
- Starting ACT!
- Logging on
- Opening a Database
 - Setting Up For Class
 - Opening Other Databases
- ACT! Screen Elements
- Toolbar Buttons
- The Navigation Bar Menu
 - Layout Tabs
 - Sizing the Contact Detail Window
- Contact Record Basics
 - The "My Record" Contact Record
 - My Record
 - Our Practice Database
 - An Overview of Security Roles
 - Contact Fields
- Inserting a New Contact Record
 - Drop-down Fields
 - Duplicating Contacts
 - Assigning Security
 - Changing Preferences
 - Deleting Contacts

Working Your Contacts

- Locating Contacts
 - Browsing Records
- The Contact List
 - Sorting the Contact List
 - Adding and Removing Columns
- The Lookup Menu
- Lookup Variations
 - Adding to Lookups
 - Narrowing Lookups
 - Previous Lookups
 - Keyword Searches
 - Lookup, Any fields
 - Lookup Annual Events
 - Edit Mode
 - Tag Mode
 - Lookup and Omit Tagged Records
 - Printing Lookups
- Secondary Contacts
 - Lookups on Secondary Contact Fields
 - Promoting From Within

Taking Notes

Working Your Schedule

- Activities
 - Calls, Meetings, and To-dos
 - Invitations
 - Responding to an Invitation
- Using the Calendar
 - Calendar Pop-ups
 - Navigation Tips for the Calendar Views
 - The Today Button
 - More on Mini-calendars
- Calendar vs. Task List
- The Task List
 - Filtering the Task List
 - Printing Your Task List
 - Task List Pop-ups
 - Displaying the Mini-calendar any time
- Modifying Scheduled Activities
- Clearing Activities
 - Deleting a Note or History
- Recording Unscheduled Activity to History
 - Recording History to Multiple Contacts
 - History vs. Notes
- Scheduling-General Tab
 - Scheduling for Multiple Contacts
 - Alarms
 - Responding to an Alarm
- Scheduling-Recurring Activities
- Advanced Options
 - Attachments
 - Public vs. Private Activities
 - Sending an E-mail reminder
 - Scheduling for Other ACT! Users
 - Displaying Other Users' Activities
 - Adding "Scheduled For" to Task List
- Scheduling Activities using the Calendar
- Printing the Calendar
 - Roll Over
- Sharing Outlook and ACT! Activities
- Events

Working with Paper

- Creating Letters, Memos, and Fax Covers
- Printing Documents
- Editing the Attached Document



Becoming an ACT! **POWER USER**

- Custom Templates
 - Creating a Custom Document Template
 - Merging the Template with a Lookup
- Envelopes and Mailing Labels
- Choosing a Word Processor
- New Menu Item in Word
- ACT! Reports

Working with E-mail

- ACT!'s E-Mail
 - Setting Up Your E-mail in ACT!
 - Understanding ACT! E-mail Window
 - Sending E-mail from ACT! E-mail
 - Send/Receive Button
- ACT! Makes You Glad You Use Outlook
 - Sending E-mail from the Contact
 - Sending an E-mail from Outlook
 - Creating a Contact from an E-mail
 - Attach an E-mail to a Contact
 - Using the Quick Attach Feature
 - Setting Your Quick Attach Preferences
 - Handling Unattached Messages
 - Using the Attach to ACT! Icon
 - Creating an Activity from an E-Mail
- E-Mail Merge
 - Creating the E-mail Template
 - Insert Hyperlink
 - Merging the E-mail Template
 - Sending an E-mail to a Group
 - One E-mail...Lots of Addresses

Working with Internet Services

- The Internet
 - Internet Services Icon
 - View, Internet Services
 - Attaching Web Pages

Working in the Documents Tab

- Attachments
 - Opening and Editing Files
 - Removing Files from the Documents Tab

Working With Groups & Companies

- Groups
 - Displaying a Group Lookup

- Manually Adding a Contact to a Group
- Companies
- Creating/Populating a Group or Company
 - Adding Multiple Contacts
 - Using Criteria for Your Groups
 - Linking Contacts to Companies
 - Create a Company from a Contact
 - Difference between Link and Associate
 - Create a Contact from a Company
 - Disabling a Company Link
 - Pushing Changes Back to Contacts.
 - Pulling Changes from Company Record
 - Convert a Group to a Company
- Divisions and Subgroups
 - Move or Promote a Division
- Cumulative Views of Notes, History, etc.
 - Company Note or History
 - Sharing Items with a Company/Group
 - Changing Companies
 - Filtering Tabs
- Lookup Companies or Groups

Working with Opportunities

- Creating Opportunities
 - Updating an Opportunity
 - Creating a Quote
 - Closing the Deal
- Opportunity List View
 - Lookup Opportunities
 - Export to Microsoft Excel
- Opportunity Reports
 - Opportunity Pipeline
 - Opportunity Graph

Working with Dashboards

- Using Dashboards
 - Displaying Dashboard Views
 - Working in the Dashboard Views.
 - Make Dashboard Your Startup View

Working with Synchronization

- Synchronizing Your Remote Database
 - Synchronizing the Remote Database
 - Set up Sync Schedule with Scheduler
 - Using the Subscription List