

**Course: ACT! I - Introduction to ACT!**

**Length:**

8:30AM-4:30PM

**Cost:**

\$275 per student

**Materials provided:**

Everyday ACT! Manual

**Intended Audience:**

This Class is designed to meet the needs of a new ACT! user or refresh the mind of a returning ACT! User.

**Topics Covered:**

- **Navigating Toolbars and Layouts** – How do I find what I need in this database?
- **Lookups** – Learn how to find Contacts by Zip, Company, City, ID/Status and MORE!
- **Inserting Notes/Histories** – What information should I track in ACT!? What information do I put where?
- **Attaching Documents** – Can I attach any type of document to a Contact? YES..Find out how!!
- **Working with a Contact List** – Learn the advantages of using the Contact List View
- **ACT! Exporting to Excel** – Learn how to export Contact information to Excel...with a SINGLE CLICK!
- **Social Media Networking with ACT!** – What is this and how does it help me connect with my customers?
- **E-mailing** – Learn how to record Sent and Received E-mails from Outlook Directly into ACT!
- **Creating Letters, Mailing Labels, Envelopes** – Learn how to easily create these...directly in ACT!
- **Creating Letter Templates** – Can I create custom letter templates for my whole team to use in ACT!? YES!
- **Secondary Contacts** – What are they are and why do I care?
- **Calendars and Task Lists** – Learn how to use the ACT! Calendar/ Task List and the importance of doing so in ACT!
- **Managing Activities** – Where can I view my Activities to best manage them?
- **Annual Events** – Learn how to easily create reoccurring Annual Events like Birthday's, Contract Renewals, Anniversaries, etc.
- **Running Reports** – Can I use ACT! to create Reports for my boss on what I am working on?
- **Dashboards** – What the heck is a Dashboard and why do I care?
- **Creating Groups** – Learn how to easily track groups of Contacts for follow up on mailings, etc.
- **Creating Companies** – How do I easily view what's happening with my clients overall without looking at each contact separately?

