



Advanced ACT! 2009

Overview

This one day course is designed to increase delegates' existing knowledge of ACT!

Target Group

This course is aimed at database administrators or any personnel who currently use ACT! 2009 and wish to implement the more advanced functions to further aid them in their job role.

Objectives

By the end of this course delegates will be able to use ACT! fully as a contact management software package and a sales and marketing tool.

Course Content

The course covers the following areas;

- ✗ **Working with multiple contacts within ACT!**
 - Making global changes to multiple contacts
 - Writing Notes & History to multiple contacts
 - Attaching a file to multiple contacts
- ✗ **Working with the ACT! 2009 Diary**
 - Creating & scheduling activities / activity series for multiple contacts
 - Advanced use of the task list and calendars
 - Copying activities from ACT! to Outlook calendars
- ✗ **Working with Advanced Queries in ACT! 2009 Software**
 - Lookup By Example function
 - Creating advanced queries
 - Saving and re-using advanced queries
 - Placing saved advanced queries on the tool bars
- ✗ **Working with Groups and Companies in ACT! 2009**
 - Creating Companies, Groups & Sub-Groups
 - Company & Group management
 - Setting up and running Company, Group & Sub-Group rules
- ✗ **Working with templates In ACT! 2009**
 - Creating Word templates in ACT! 2009
 - Creating HTML templates in ACT! 2009 e-mail
 - E-mail merging
- ✗ **Working with reports In ACT! 2009**
 - Understanding ACT! reporting
 - Using the filters for Reports
 - Using Group, Company and Opportunity Reports
 - Saving, printing and e-mailing Reports
- ✗ **Customizing the ACT! 2009 database**
 - Understanding system fields
 - Working with layouts
 - Creating fields and understanding data types
 - Adding Custom fields
 - Customizing and or editing existing layouts
 - Customizing menus and toolbars
- ✗ **Working with contact data**
 - Importing and exporting to and from ACT! 2009
 - Exporting Contacts, Groups or Companies
 - Exporting partial contact information

- ✘ **Managing Sales Opportunities in ACT! 2009**
 - Working with the Opportunity List
 - Analyzing opportunities in Excel (optional)
 - Importing a Product List
 - Managing Opportunity Processes
 - Opportunity Pipelines and Graphs
- ✘ **The Dashboard**
 - Understanding the Dashboard
 - Editing the Dashboard view
 - Creating a new Dashboard
- ✘ **Managing Database Users**
 - Adding a new user
 - Creating passwords
 - Adding Permissions
 - Best practice for removing users
- ✘ **Database Maintenance**
 - Scanning for duplicates
 - Setting reminders
 - Clearing old Notes, Histories and Activities
 - Setting reminders
 - General Do's and Don'ts for database integrity

Outcomes

Each delegate will receive individual feedback and assistance, and may be asked to identify key changes to implement and skills to practice.

