

Introduction, 1 Day

Course Description

This course is for the people who are new to personal information managers and need to learn the basics about Act!.

Prerequisites

Participants should already be familiar with basic Windows use. No prior experience with Act! is necessary

Topics Covered

Overview of ACT!

Viewing and Editing Contact Database Records

Creating a Contact Database

Creating a Contact Database
Editing a Contact Database
Printing an Address Book

Locating Contacts

Finding Contacts
Viewing Contacts
Sorting Contacts

Organizing Contacts

Categorizing Contacts
Grouping Contacts
Managing Contact Groups

Working with Calendars and Activities

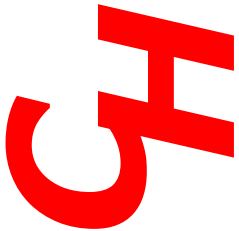
Working with Calendar Views
Scheduling Activities
Working in Task List View
Managing Activities

Organizing Sales Opportunities and Contact Activity

Creating Sales Opportunities
Looking Up Contact Activity
Looking Up Annual Events
Using SideACT! to Manage Notes and Activities

Creating Word Processor Documents

Creating a Letter
Formatting Documents
Viewing Other Templates
Working with the Library Tab



Intermediate, 1 Day

Course Description

This course will introduce you to the advanced features of contact management. You will probably get the most out of this course if you want to learn how to modify templates and reports, perform complex lookups, customize a database, automate procedures, exchange data, perform database maintenance, and link to the Internet.

Prerequisites

For the student who is familiar with Windows and the basics of the Act! environment. Coming into this course, you should understand introductory contact database terms such as contact, record, and report.

Topics Covered

Creating and Using Queries

- Creating Queries
- Creating Advanced Queries
- Adding Queries to the Lookup Menu

Creating Macros

- Creating a Macro
- Adding Macros to the Toolbar

Importing, Exporting, and Synchronizing Data

- Importing Data
- Exporting Data
- Exchanging Data Using Hand-held Devices
- Synchronizing Data

Customizing Act!

- Specifying Startup Settings
- Modifying Fields in a Database
- Modifying Layouts
- Modifying Menus and Keyboard Shortcuts

Working with Templates and Mail Merge

- Creating a Mail Merge Template
- Generating Form Letters
- Adding Templates to the Write Menu

Customizing Report Templates

- Modifying Report Templates
- Using a Custom Report Template

Administering Your ACT! Database

- Managing Data Security
- Performing System Maintenance

Internet and E-mail Features

- Internet Services
- Email Functionality