

ACT! 2009: Basic

1 day

Description

In the fast-paced corporate environment, you need to quickly and efficiently correspond with your clients, customers, business partners, managers, and colleagues. To meet your business requirements, you would need to properly maintain the list of contacts and information so that you can access or modify them at any time. ACT![®] 2009 is a contact management system that will help you work with your business contacts, manage events, track related communications, and enhance your business relationships significantly.

You will launch ACT! 2009 and use it to create a new database, to which you will add contacts. You will find and sort contacts, categorize contacts, schedule activities, manage tasks and conflicts, and work with recurring activities and documents. You will then create sales opportunities for contacts and schedule annual events.

Prerequisites

- Windows 7: Basic or equivalent experience

Course Outline

Lesson 1: Exploring ACT! 2009

- Topic 1A: Explore the ACT! Interface
- Topic 1B: Access the ACT! Help System

Lesson 2: Managing a Contact Database

- Topic 2A: Create a Contact Database
- Topic 2B: Add Contacts to a Contact Database
- Topic 2C: Locate Contacts in a Database
- Topic 2D: Edit Contacts
- Topic 2E: Sort Contacts
- Topic 2F: Print an Address Book
- Topic 2G: Generate Contact Reports

Lesson 3: Organizing Contacts

- Topic 3A: Create Companies from Contacts
- Topic 3B: Group Contacts
- Topic 3C: Manage Contact Groups
- Topic 3D: Generate Group Reports
- Topic 3E: Communicate Using Email

Lesson 4: Working with Calendars

- Topic 4A: Work with Calendar Views
- Topic 4B: Schedule Activities
- Topic 4C: Manage Activities
- Topic 4D: Look Up Annual Events
- Topic 4E: Work in the Task List View
- Topic 4F: Print a Calendar

Lesson 5: Organizing Sales Opportunities

- Topic 5A: Create Sales Opportunities
- Topic 5B: Assign Multiple Contacts to an Opportunity
- Topic 5C: Look Up Contact Activity

Lesson 6: Working with a Word Processor

- Topic 6A: Create a Document
- Topic 6B: Edit a Document
- Topic 6C: Format a Document
- Topic 6D: Check Spelling
- Topic 6E: Attach Documents