

Course Specifications

Course Length: 1 Day

Prerequisites: Windows Introduction or Equivalent knowledge.

Course Cost: \$160.00

What's in Act!: Level II:

Act! Introduction, students will learn the fundamentals of contact management. This includes learning how to find and manage client information, schedule and keep track of activities with clients, and create word processing documents.

Course Content

Lesson 1:

Overview of ACT!

- Starting ACT!
- Observing a Contact Database

Lesson 2:

Creating a Contact Database

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

Lesson 3:

Locating Contacts

- Finding Contacts
- Viewing Contacts
- Sorting Contacts

Lesson 4:

Organizing Contacts

- Categorizing Contacts
- Grouping Contacts
- Managing Contact Groups

Lesson 5:

Scheduling Activities

- Scheduling Activities in the Contacts Windows
- Managing Activities
- Scheduling Recurring Activities
- Creating Sales Opportunities

Lesson 6:

Working with Activities in Other ACT! Windows

- Working in the Calendar Windows
- Working in the Task List Window
- Using Side ACT! To Manage Notes and Activities

Lesson 7:

Creating Documents with the Word Processor

- Creating a Letter
- Formatting Documents
- Viewing Other Templates