ACT! Training for Users and Administrators

1st Computer Consultancy – **ACT! Certified Consultants**

User Training

- Introduction of ACT! software Professional and Premium versions.

- The essential ACT! screen elements, the welcome screen, best practice for navigating ACT!, using the toolbars, menus, icon bar & tabs. Getting Started, Tips, Videos, Help.

- Contact Record Basics

  Structure of ACT! contact records, data entry rules, using notes & history tabs, avoiding duplicated records, controlling access to contact records, creating, editing & deleting records. Saving ACT! contacts as vCards vcf file email.

- Finding ACT! Contacts and Data

  Using the look-up menu, look-up options, keyword searches, previous look-up & creating basic a contact query. Customising contact list views, tagging contacts, searching for secondary contacts & checking contact activity.

- Activity & Calendar Management

  Scheduling activities, viewing activities in the task list & ACT! calendars, customising calendar views, using the availability tab including invitations and resources management, scheduling activities with multiple contacts, sending activity notifications in iCalendar format & integrating ACT! activities with Outlook.

- Using ACT! with e-mails making sure link set up.

- Using ACT! to send and receive e-mails, attaching e-mails to contacts, creating new contact records from an incoming e-mail, creating an activity from an e-mail and basic e-mail merges
  Writing Documents & Mail Merges

- Using ACT! to write letters to contacts, creating document templates, sending mail merges & using the ACT! menu in Microsoft Word.

- Groups & Companies
  Creating and populating a Group or Company, switching between group & company views, creating collective notes, histories, activities & opportunities.

Administrators Training

- Summary - Provides the skills and best practice tuition enabling administrators to manage, maintain and customise their ACT! database
- Typically delivered to - ACT! database administrators who have undertaken end-user training or are experienced ACT! users
- Creating an ACT! Database

  How to create a new ACT! database, setting up new ACT! users, deleting & re-assigning ACT! users, understanding ACT! security roles, currency preferences, managing ACT! teams & defining preferences
- Protecting ACT! data

  Finding & removing duplicate records, backing up an ACT! database, restoring ACT! data, locking / unlocking a database, clearing old contact data & best practice for database performance and data integrity
- Importing / Exporting Data
- Using the ACT! import wizard, importing data from other applications, creating a data import map, exporting ACT! data to other applications and exporting a contact list
- Database Customisation
  ACT! field options including tick boxes, image fields & drop-down lists. Defining fields & customizing ACT! layouts.Customising ACT! Menus and toolbars.
- Admin Dashboards Configuring ACT! Administration dashboards
- ACT! Network Configuration
- Understanding how ACT! works on a network, integrating ACT! with other applications including Microsoft Outlook & Microsoft Word & locating program files and folders.
- Sharing ACT! data with remote users

  Introducing ACT! database synchronisation, options and performing database sync.
- ACT! Report Templates ACT! report customisation & an overview of advanced reporting capability using VB scripting
- Sage Link setting up and defining which way updates work.

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ACT E-Marketing and Sales

- Profiling ACT! contacts - Capturing extra information in ACT! to optimise marketing, ACT! field options & field rules, adding and amending ACT! Fields
- Data lists - Recommended list formats, preparing your lists before importing into ACT! & how to import data lists & contacts into ACT!
- Building Contact Lists - Running advanced look-ups and complex ACT! queries. Benefits of targeting specific contact groups vs. generic mailing lists, creating ACT! groups & sub-groups, adding & removing contacts from groups, using dynamics groups & applying membership rules.
- Managing Mailing Lists - Checking for duplicates & de-duplicating data. Data cleansing checks & best practice.
- Email Marketing with ACT! - Creating email templates, editing and formatting email templates, best practice for adding images & PDF files to ACT! email templates. Deciding your email subject title, timing your message, testing & sending your email merge. Managing opt-out requests & email bounce-backs
- Introducing ACT! E-Marketing (Swiftpage) - Advanced email marketing functionality including HTML email templates & e-marketing reporting
- Mail Merging from ACT! - Create & edit document templates, editing and formatting templates for ACT! mail merges, converting standard MS Word documents to ACT! mail merge templates. Mail merge best practice including testing, batching and dealing with long documents, using the ACT! mail merge wizard & attaching a record history to all matching ACT! contacts. Making templates printer friendly , printing labels & envelopes
- Marketing Reporting - Tracking the marketing referral source on each new sales opportunity, using ACT! reports to measure marketing results
- Staying in touch - Assigning new sales opportunities to ACT! users, scheduling follow up activities to stay on top of leads and enquiries, creating custom marketing activities to track leads & group scheduling

ACT Sales Users

- Customising the ACT! Opportunity Module - Creating multiple sales processes, building ACT! product lists, creating & editing sales document templates, customising the ACT! opportunity layout & adding new opportunity fields
- Working with Sales Opportunities - Tracking activities & histories with opportunities & contacts, attaching documents to sales opportunities.
- Sales Opportunity Management & Reporting - Working with Opportunity Lists, running standard ACT! sales reports, adapting sales reports, using the ACT! sales graph & pipeline chart & working with ACT! sales dashboards & editing dashboard components & applying filters