

Act! v19.2 Training Session Plan



Getting Started

- Introduction to ACT!
- Navigating round the system
- Using the menus and toolbar
- Contacts – All fields explained and demonstrated
- Groups – how contacts use Groups and why
- Companies – hierarchy and levels

Users Operational

- Contact Record Detail and List View Manipulating Records, Modify List view
- Lookups Searching the Database various methods, Exporting to Excel
- Tabs Docs, Opportunities, Secondary, Personal, Web, Social, Sage, Access
- Activities Creating Activities, To Dos, Calls, Appointments, Meetings, History
- Attachments Attaching files, shortcuts and Folders
- Advanced Search Using Advanced Criteria and Saving Search
- Duplicating Duplicating contact details and adding different names
- Groups Creation of Groups Sub Groups and Webforms
- Companies Creating Companies and Linking with Contacts
- Task List Organising and completing tasks
- History List Using History to find Events
- Calendar Scheduling calls, appointments, reminders, Viewing activities daily, weekly, monthly etc
- Templates Adding and Changing Templates for Word and Email Documents
- Mail Merge Word and Email Merge with Documents
- Activities Types of Activity and Scheduling
- Smart Tasks Automated Tasks for Scheduling Activities To Dos and Emails



- Emails Attaching Sent and Received Emails
- Opportunities Opportunities Types and Stages
- Opportunities Creating and Opportunity and Viewing
- E-mail Sync Setting up email to synchronise with ACT Contacts and Calendar
- Reports Using reports and setting criteria
- Import/Export Importing and Exporting Excel and Act Databases
- Duplicate Scan Duplicate Scan on Import
- Emarketing Emarketing Setup up templates and Sending Campaigns
- Dashboards Administrative and Opportunities Dashboards
- Printing Printing Contacts, Calendars, Labels, envelopes
- Help Getting Help

Administrative Tasks

- Define Users Create Users and Assign Permissions Removing Users
- Define Fields Customising fields to enable relevant searching (Field Security)
- Field Types Dropdown, multi select, mandatory, record History, Primary Fields etc
- Design Layouts Customising displays and tabs to company requirements
- Customising Columns, Toolbars, Navigation Bar, Short Cut Keys
- Dashboard Design Setup Dashboards for Users Bar charts pie Charts
- Synchronising Synchronising Database with a Laptop
- Database Maintenance Backing up Database and Maintenance

