

Course 1 - The Basics

General Introduction

- ◆ What is ACT! Contact Management Software
- ◆ Opening the database
 - Logging on
 - My Record”
- ◆ The ACT Database
 - The database name
 - Contacts in the database
 - Fields
 - Field values
 - Different types of fields
 - Companies and groups – a quick reference
- ◆ Menus and Icons
 - The Menu Bar
 - Top tool bars
 - Navigation/side tool bar
 - Tabs

Views

- ◆ Contact view
 - Layouts & layout tabs
 - Resizing the contact record view
- ◆ List view
 - Customizing the view
 - Sorting the list
 - Tag Mode
 - Edit Mode

Working with contacts

- ◆ “Adding a new contact
- ◆ Duplicating contacts
- ◆ Deleting contact/s
- ◆ Finding contacts – lookups in the contact view
 - Searching for a contact
 - Adding to a lookup
 - Narrowing a lookup
 - Keyword search
 - Searching for Annual events
- ◆ Finding contacts in the list view
 - By typing into the header
 - Sorting alphabetically
 - Tag and edit modes
 - Lookup and Omit Tagged Records
- ◆ Recording Notes and History as you work with a contact
- ◆ Recording a Note or History for Multiple contacts
- ◆ Secondary Records

- Finding the secondary contact
- Promoting to primary contact

Documents

- ◆ Adding or attaching a document to a contact record
- ◆ Modifying the document
- ◆ What kind of documents can be attached

Activities, Calendars and Diaries

- ◆ Activities
 - Calls, Meetings and To-do's
 - Scheduling Calls, Meetings and To-dos for me and for other users
 - Modifying the regards list
 - Scheduling for multiple contacts and Users
 - Setting and clearing Alarms
 - Recurring Activities
 - Clearing activities and creating a follow-up activity
 - Sending Invitations – Premium only
 - Modifying and moving scheduled activities
- ◆ Advanced Options
 - Attachments
 - Email activity details
- ◆ Events
- ◆ The Calendar
 - The different Calendar views – Day , Work Week, Week, Month
 - The Mini Calendar
 - Filtering Calendars and Task lists for users
 - Granting Calendar Access
- ◆ Task List
 - Filtering for Users
 - Clearing one or many tasks
 - Rolling over or not rolling over tasks not completed.

Email

- ◆ ACT Email and your existing email system
- ◆ Viewing email
 - Creating a contact from an email
 - Creating an Activity from an email
 - Attaching an email to a Contact
- ◆ Sending and Receiving
 - Sending from within the Contact Record
 - CC and BCC emails

Basic mail merging

- ◆ Email merge
- ◆ Mail Merges to Text
- ◆ Mail merges to fax