

## Course 2 - Advanced User Course

### Advanced Mail Merging

- ◆ Creating your own templates
- ◆ Adding templates to the icon bar
- ◆ Adding templates to the drop down list
- ◆ Creating history when sending one letter
- ◆ Creating history when sending a letter to many contacts

### Advanced email

- ◆ Formatting the “Emailbody” template
- ◆ Creating additional email templates
- ◆ Creating and selecting signatures in ACT
- ◆ Emailing from Outlook using the ACT address list
- ◆ Modifying what is saved to the contact record
- ◆ Attaching incoming emails to contacts

### Duplicates

- ◆ Finding duplicates
- ◆ Merging duplicates

### Activity Series

- ◆ Where to use activity series
- ◆ How to modify

### Queries

- ◆ Specifying a query
- ◆ Saving a query for future use
- ◆ Converting a query lookup to a dynamic group

### Using Reports

- ◆ The standard reports available in ACT.
- ◆ Running different reports
- ◆ Setting up filters
- ◆ Using reports to improve your efficiency

### Working with Opportunities

- ◆ Opportunities in ACT and what are they
- ◆ Creating and modifying your opportunity process
- ◆ Entering opportunities
- ◆ Modifying and updating the opportunity
- ◆ Creating a Quote
- ◆ Finalising the sales
- ◆ Analysing your opportunity and sales pipeline
- ◆ Using reports to track what you have achieved
- ◆ Exporting your opportunities to Excel

## Groups, Companies and Teams

- ◆ Groups
- ◆ Differences between groups, Companies and Teams
- ◆ Creating a new group and New sub group
- ◆ Group Lookup
- ◆ Adding Contacts to Groups
- ◆ Static and Dynamic groups
- ◆ Companies
  - Creating a new company
  - Creating a company from a contact
  - Creating a Contact from a Company
  - Adding Contacts to Company
  - Linking Contacts to Company
  - Disabling a Contact Link
  - How to apply Company changes to Contacts
  - How to convert a Group to a Company
- ◆ Viewing the Cumulative Notes, History, Activities for groups and companies
  - Filtering the views
  - Creating a lookup of a contact list belonging to a company or group
- ◆ Divisions and sub groups
  - When to use these
  - Promoting Divisions and Subgroups
  - Moving divisions, groups and subgroups