

ACT! Training Agenda

ACT! 2007 Advanced Course

Public Training Class - DC Training Facility
Day, Month 01, 2008

10:00-10:15 *Introduction & Housekeeping*

- Classroom setup
- Student & Instructor Introductions
- Student/Instructor Expectations

10:15-10:45 *Advanced Lookups & Queries*

- Advanced queries
- Lookups by example
- Additional lookups
- Company lookups
- Group lookups
- Opportunity lookups

10:45-11:45 *Performing a Mail Merge*

- Working with document templates
- Personalizing document templates
- Performing a mail merge

11:45-12:45 *Lunch (Yum!)*

12:45-1:15 *Document and File Management*

- The Documents tab
- Attaching files

1:15-2:00 *Sending Mass E-mail Messages*

- Working with e-mail templates
- Performing a mass e-mail merge
- Other e-mail options

2:00-2:45 *Specifying Outlook's ACT! Settings*

- Creating an ACT! Address Book
- Sending e-mail messages to ACT! contacts
- Sharing ACT! and Outlook activities

2:45-3:00 *Bio Break***3:00-3:45** *Advanced Activities*

- Using the Task List
- Managing activity types and priorities
- Managing resources
- Working with multiple activities
- Scheduling an activity series
- Workgroup calendar features
- Setting activity preferences
- Printing a calendar

3:45-4:00 *Bio Break***4:00-4:45** *Opportunity Management*

- Viewing opportunities
- Adding and removing opportunities
- Generating quotes
- Exporting opportunities to Excel
- Managing the opportunity process
- Maintaining a product list.

4:45-5:00 *Wrap-Up*

- Course Recap
- Questions & Answers