



**ACT! POWER USER.
COURSE CURRICULUM**



WORKING WITH CONTACTS

The ACT! Interface

- Identifying Key Elements of the ACT! Interface

Launching ACT!'s Views

- Setting Navigation/View Bar Options
- Toolbar/Menus

Launching Contact View Tabs

The My Record

- Find and Correct the My Record

Creating & Deleting Contacts

- Inserting a Contact
- Duplicating a Contact
- Deleting Contacts

Entering Notes for a Contact

- Inserting a Note for a Contact

Attaching Files to a Contact

- Attaching a File to a Contact Record

BASIC LOOKUPS

Simple Lookups

- Looking Up All Contacts
- Looking Up on Basic Fields
- Looking Up on Other Fields

Looking Up Empty/Non-Empty Fields

- Looking up Empty Fields
- Looking Up Non-Empty Fields

Replacing/Adding/Narrowing Lookups

- Replacing a Lookup
- Adding to a Lookup
- Narrowing a Lookup

Annual Events Lookups

- Looking Up Annual Events

Contact Activity Lookups

- Looking Up Modified Contacts

Keyword Searches

- Searching for a Specific Keyword
- Keyword Searching Email Addresses



Lookups By Example

- Searching for a Field Value
- Searching for Multiple Field Values

ADVANCED QUERIES

MASS UPDATING FIELDS

Changing the Value of a Field for Multiple Contacts

- Swapping Fields
- Copying Fields
- Replacing Fields

MANIPULATING LIST VIEWS

Contact List View Basics

- Launching the Contact List View
- Sorting Contacts

Customizing the Contact List View

- Adding Columns
- Removing Columns
- Rearranging Columns

The Tag Mode

- Switching to the Tag Mode
- Building a Lookup in the Tag Mode
- Refining a Lookup in the Tag Mode

SCHEDULING ACTIVITIES

Navigating the Calendar Views

- Viewing the Daily Calendar
- Viewing the Weekly Calendar
- Viewing the Monthly Calendar
- Using the Mini Calendar
- Filtering the Calendar

Scheduling Activities

- Scheduling an Activity
- Editing an Existing Activity
- Rescheduling an Activity

Completing Activities

- Clearing an Activity
- Erasing an Activity
- Recording a History of an Unscheduled Activity

Using the Task List

- Editing Activities in the Task List
- Sorting the Task List
- Changing Task List Columns

SALES/ OPPORTUNITIES

Adding Opportunities

- Entering a New Opportunity
- Editing an Existing Opportunity



Completing an Opportunity

- Completing an Opportunity
- Deleting an Opportunity

Viewing Opportunities

- Viewing Opportunities for a Contact
- Viewing Opportunities for a Group of Contacts

Managing the Sales Process

- Modifying Sales Stages
- Looking Up Contacts by Sales Stage

Running Sales Reports

- Running Sales/Opportunity Reports
- Filtering Opportunity Reports
- Running Sales Graphs
- Running Sales Pipeline

ADVANCED SCHEDULING

Working with Multiple Activities

- Scheduling an Activity for Multiple Contacts
- Scheduling a Recurring Activity

Scheduling an Activity Series

- Creating an Activity Series
- Editing an Activity Series
- Scheduling an Activity Series

WRITING LETTERS

Setting Letter Preferences

- Setting Word Processor Preferences
- Writing a Template-Based Letter
- Writing Letters, Memos, and Fax Cover Pages
- Writing Other Template-Based Letters
- Creating a History of a Letter Sent

Creating Document Templates

- Creating a Document Template from Scratch
- Editing Existing Document Templates

MAIL MERGING

Preparing for a Mail Merge

- Determining the Recipients
- Ensuring Good & Complete Data





Sending a Mail Merge

- Using the Mail Merge Wizard
- Printing Letters & Creating a Letter Sent History
- Printing Envelopes
- Printing Standard Envelopes
- Creating Envelope Templates
- Editing Envelope Templates
- Printing Labels
- Printing Standard Avery Labels
- Creating Non-Standard Label Templates

Changing Group Membership

- Adding Contacts to a Group
- Removing Contacts from a Group
- Adding the current lookup to a Group
- Changing Group Membership in the Contact View

VIEWING & COMPOSING EMAIL

Setting Email Preferences

- Setting Email Preferences
- Viewing Email in ACT!
- Checking Your Messages
- Composing an Email in ACT!
- Composing a Message to an ACT! Contact

USING GROUPS/COMPANIES

Creating Groups/Companies

- Creating a Group/Companies
- Creating a Subgroup
- Deleting Groups/Companies or Subgroups
- Renaming an Existing Group/Company

