



Sage ACT! Everyday

About Sage ACT! Everyday: The Sage ACT! Everyday Course is a full day course using the latest version of Sage ACT! that covers all the basic functions and more! We demonstrate the concepts of Customer Relationship Management (CRM) and how you can achieve these using Sage ACT!.

Audience: This course is designed for individuals who have never previously used ACT! and/or current ACT! users who have never received formal ACT! training. The course is ideal for anyone who would like to get more out of ACT! and improve their day to day productivity!

Pre-Requisites: Understanding of Basic Windows operations. Able to navigate Windows and use mouse.

Content: The topics listed on the following page are covered in the Sage ACT! Everyday Course. Additional topics such as ACT! E-Marketing & Synchronisation are detailed in the Sage ACT! Everyday Manual however these topics are not covered in the day course due to time constraints. For additional training on these topics, please speak to your ACT! Consultant or contact the Head Office.

The Basics

- What's Contact Management Software?
- Starting ACT!
- Opening a Database
- ACT! Screen Elements
- The Navigation Bar Menu
- Toolbar Buttons
- Layouts

Working Your Contacts

- Contact Record Basics
- Inserting a New Contact Record
- Detail and List Views
- Locating Contacts
- Secondary Contacts
- Attachments
- Web Info

Lookups & Queries

- The Lookup Menu
- Lookup Variations
- Adding to Lookups
- Narrowing Lookups
- Keyword Searches
- Lookup Annual Events
- Lookup, Any fields
- Lookup by Example
- Lookup and Omit Tagged Records
- Printing Lookups
- Lookup Secondary Contacts

Working Your Schedule

- Activities
- Calls, Meetings, and To-dos
- Scheduling Activities
- Calendar vs Task List
- Task List
- Clearing Activities
- Taking Notes
- Sharing Outlook and ACT! Activities
- Modifying Scheduled Activities
- Recording an Unscheduled Activity
- Scheduling for Multiple Contacts
- Scheduling-Recurring Activities
- Invitations
- Alarms
- Displaying Other Users' Activities
- Printing the Calendar

Working Via E-mail & Letters

- Creating Letters, Memos, Faxes
- Printing Documents
- Saving Documents
- Creating Templates
- Merging a Template with a Lookup
- Envelopes and Mailing Labels
- ACT! Email Integration
- Sending E-mails
- Creating a Contact from an E-mail
- Attach an E-mail to a Contact
- Creating the E-mail Template
- E-Mail Merge

Groups & Companies

- Groups
- Displaying a Group Lookup
- Manually Adding a Contact to a Group
- Companies
- Creating/Populating a Group/Company
- Adding Multiple Contacts to Group/Co
- Linking Contacts to Companies
- Create a Contact from a Company
- Convert a Group to a Company
- Divisions and Subgroups
- Move or Promote a Division
- Cumulative Views of Notes/Histories
- Changing Companies
- Filtering Tabs
- Lookup Companies/Groups

Opportunities

- Creating Opportunities
- Updating an Opportunity
- Creating a Quote
- Closing the Deal
- Opportunity List View
- Lookup Opportunities
- Export to Microsoft Excel
- Opportunity Pipeline
- Opportunity Graph

Viewing Dashboards & Reports

- Using the Dashboard
- ACT! Reports