

Act! Workshop Outline

Day 1

Basics

- What is Act!?
- On-premise vs Cloud vs Mobile
- Opening Act!
- Navigation
- Toolbars and Menus
- The Contact List

Contact Records

- Creating a New Contact Record
- Duplicating Contacts
- Relationships
- Secondary Contacts
- Deleting Contact Records

Entering Contact Data

- The Notes Tab
- The History Tab
- Manually Recording History
- Deleting Notes / History
- Attaching Files
- The Documents Tab
- The Web Information Tab
- Social Updates

Lookups and Searches

- Using the Lookup Feature
- Universal Search
- Keyword Search
- Contact Activity Lookup
- Lookup by Example
- Advanced Query

Scheduling Activities

- Scheduling Activities with Contacts
- Setting up a Recurring Activity
- Sending Invitation Emails
- Scheduling an Activity for Another User
- Clearing an Activity
- Calendar and Scheduling Preferences
- Scheduling an Activity Series
- Activity & History Reporting

Day 2

Groups and Companies

- Creating a Group & Subgroups
- Adding Contacts to a Group
- Creating a Company & Divisions
- Adding Contacts to a Company
- Linking a Contact to a Company

Opportunities

- Setting up an Opportunity Process
- Setting up a Product List
- Creating New Opportunities
- Creating a Quote from an Opportunity
- The Opportunity List
- Closing an Opportunity
- Reporting on Opportunities

Letters and Mail Merges

- Creating Letter Templates
- Writing a Letter
- Printing and Saving the Letter
- Mail Merge

E-mail Integration

- Configuring E-mail Integration
- Sending Emails
- Quick Attach
- Attaching an E-mail to an Existing Contact Record
- Performing an E-mail Merge

Contact & Calendar Synchronisation

- Calendar Syncing Preferences
- Contact Syncing Preferences
- Manual Synchronisation
- Automatic Synchronisation

Day 3

Act! Marketing Automation

- Campaign Management
- Interactive Template Editor
- Visual Workflow Designer
- Landing Pages & Lead Capture
- Drip Marketing
- Surveys
- Real-Time Campaign Metric