



Just-In-Time Training Options

Understanding ACT! – A Chalk Talk

Learning how all the components of ACT! fit together, this class gives you the information you need to plan or enhance your ACT! contact management system. Learn how contact, company, group, sales opportunity, activity and history records work together to create “the whole.” Sharpen you pencils! You will want to remember every word.

Locating the Data You Need

Learn the best procedures to lookup and segregate your contact records into meaningful subgroups. You will practice creating Companies, Divisions, Groups and Sub-Groups. Discover how to create complex queries and how to drill down to locate specific contact records.

Learning the Art of ACT! Calendaring

Learn how stay organized by using the ACT! Calendar. Become familiar with all the different calendar views. Experiment with managing the ACT! Task List to view future and past activities. Practice creating notes, histories and follow-up activities. Create you own activities types.

Managing Correspondence

Configure ACT! to correspond with a variety of contacts, groups and companies. Learn the skills necessary to create custom letter and email templates. Understand the integration between MS Word and MS Outlook. Design an Activity Series to support a sales or marketing campaign.

Managing Your Pipeline with Opportunities

Track and prioritize your pending sales opportunities. Discover how ACT! Sales Opportunities can ease the pain associated with sales forecasting. Learn how to capture information needed to manage your sales and/or sales team. ACT! Sales Opportunities will help you easily view sales charts, prioritize deals and calculate closing ratios.

ACT! Reporting

Discover how to create and customize ACT! Reports. Capture, save and print data associated with your calendar, contacts, sales opportunities, sales history and more. Learn how to customize labels to print exactly the way you desire. Set up your ACT! Dashboard to display projected, current and closed opportunities.

Creating and Managing Remote Databases (Synchronization)

Learn how to plan, setup and manage a remote database. Spend time looking at the different synchronization options including Network Synchronization and Internet Synchronization. This class will teach you how to set up a remote database containing a subset of the master database. Review common synchronization errors and learn techniques for avoiding or correcting those errors.

Keeping Your ACT! Database Healthy

Regular maintenance can keep your database running morning, noon and night. Learn how to setup regular maintenance and database backup routines. Explore ACTDiag, the utility in ACT! designed to repair many database problems. Discover the nuances of database security. Develop a strategy for trouble-shooting common ACT! Database problems.