

Sage ACT V 8.0

Course Objectives:

This course is designed for new users of ACT V 8.0, or for users with limited experience. Delegates will learn how to set up a contact management system, using it to record and maintain contact information. They will also learn how to effectively manage and track sales activities.

Prior Knowledge Required:

No prior knowledge of ACT is required. Some basic PC & Windows experience is assumed.

Course Duration: 2 days, but course contents can be tailored if required.

Getting Started With ACT! V 8.0

- Concepts of a Contact Management System
- Launching ACT! V 8.0
- Exploring The ACT! Environment
- Creating A New Database

Working With Contact Records

- Entering New Contacts
- Editing Contact Records
- Entering & Editing Notes In a Contact Record
- Attaching Files To a Contact Record
- Sorting Contact Records
- Finding a Contact Record
- Deleting Contact Records

Scheduling and Maintaining Your Calendar

- Adding Activities To Your Schedule
- Scheduling a Series of Activities
- Using The Task List
- Viewing and Printing Calendars
- Recording Completed Activities
- Deleting Activities
- Using SideACT!
- Integrating ACT! With Outlook

Creating ACT! Documents

- Writing a Letter To a Contact
- Creating and Editing Templates
- Formatting Documents
- Performing a Mail Merge for Multiple Contacts
- Producing Mailing Labels and Envelopes

Using E-Mail With ACT!

- Sending & Receiving E-mail Messages
- Sending & reading Attached Files
- Creating A Contact Record from an E-Mail
- Replying To and Forwarding Messages
- Storing E-Mail Messages

Tracking Sales Opportunities

- Recording Sales Stages
- Viewing Sales and Forecasts
- Creating Sales Graphs From Your Data

Organising Contact Records

- Grouping and Sub-Grouping Contacts
- Adding and Removing Group Members
- Viewing the Members of a Group
- Creating Group Notes
- Creating Group Histories and Attachments
- Assigning and Viewing Group Activities

Customising ACT!

- Modifying Database Fields
- Adding Drop Down Lists To Data Fields
- Creating and Deleting Fields
- Changing Colours and Fonts
- Customising Columns
- Creating and Changing Layouts
- Customising Menus and Toolbars

Importing and Exporting Data

- Importing/Exporting With Another Application
- Importing/Exporting With Another Database
- Synchronising Data

Producing Reports in ACT!

- Overview of Reports Available
- Running a Report

Database Administration

- Password Protection
- Adding Database Users
- Removing Users Access Privileges
- Backing Up Your Database
- Database Maintenance
- Checking For Duplicate Entries



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