ACT!: LEVEL 2

Available Dates: **Request Dates**
Class Length: **1 day**
Cost: **$399**
Email Computer Visions about this class

Class Outline:

Description:
This ILT Series course, rated 4.9/5.0 in overall quality by ProCert Labs, builds on the concepts and skills taught in ACT! 2007: Basic. Students will perform advanced lookups and queries, work with document and e-mail templates, and perform mail merges. They will also learn advanced document and file management techniques, and they will use the Task List to create and customize activities and resources. Finally, students will learn about calendar access settings, and they will create opportunities, write quotes, and work with product lists. Comes with CertBlaster pre- and post-assessment software (download).

Prerequisites: ACT! 2007: Basic, or equivalent experience

Unit 1 : Advanced queries and lookups

Topic A: 0 Advanced queries

A-1: Creating an advanced query

A-2: Saving an advanced query

A-3: Editing an existing query

Topic B: 0 Lookups by example

B-1: Using the Lookup By Example feature

B-2: Searching multiple fields

B-3: Converting to an advanced query

Topic C: 0 Company lookups

C-1: Performing a lookup on company fields

C-2: Saving a lookup as a company

Topic D: 0 Group lookups

D-1: Finding all contacts that are members of a group

D-2: Finding a group by name

D-3: Searching on group fields

D-4: Saving a lookup as a group

Topic E: 0 Opportunity lookups

E-1: Performing a lookup of all available opportunities

E-2: Looking up a specific opportunity by name

E-3: Looking up an opportunity by other fields

E-4: Filtering the Opportunity List view

Topic F: 0 Other lookups

F-1: Performing an annual events lookup

F-2: Performing a contact activity lookup

Unit 2 : Mail merge

Topic A: 0 Document templates

A-1: Creating a document template

A-2: Editing a document template

Topic B: 0 Personalizing document templates

B-1: Inserting field placeholders

B-2: Inserting a My Record field placeholder

B-3: Running a letter template for a single contact

Topic C: 0 Performing a mail merge

C-1: Narrowing a lookup to ensure complete data

C-2: Performing a mail merge for the current lookup

Unit 3 : Document and file management

Topic A: 0 The Documents tab

A-1: Adding a document to the Documents tab

A-2: Viewing an attached document

A-3: Removing a document from the Documents tab

Topic B: 0 File attachments

B-1: Attaching a file to a contact record

B-2: Opening an attached file

Unit 4 : Mass e-mail messages

Topic A: 0 E-mail templates

A-1: Creating an e-mail template

A-2: Editing an e-mail template

Topic B: 0 Mass e-mail merges

B-1: Looking up contacts with a non-empty E-mail field

B-2: Sending a mail e-mail message

Unit 5 : Advanced activities

Topic A: 0 The Task List

A-1: Filtering the Task List

A-2: Editing an activity in the Task List

A-3: Sorting the Task List

A-4: Changing Task List columns

Topic B: 0 Activity types and priorities

B-1: Creating an activity type

B-2: Creating a custom activity priority

Topic C: 0 Resources

C-1: Adding, editing, and removing a shared resource

C-2: Checking resource availability

C-3: Scheduling a resource

Topic D: 0 Multiple activities

D-1: Scheduling an activity for multiple contacts

D-2: Scheduling a recurring activity

Topic E: 0 Scheduling an activity series

E-1: Creating an activity series template

E-2: Editing an existing activity series template

E-3: Scheduling an activity series

Topic F: 0 ACT! and Outlook activities

F-1: Updating ACT! and Outlook activities

F-2: Removing shared activities

Unit 6 : Calendar settings

Topic A: 0 Workgroup calendar features

A-1: Granting another user permissions for your calendar

A-2: Viewing your meeting invitations

Topic B: 0 Calendar and scheduling preferences

B-1: Setting your calendar preferences

B-2: Setting your scheduling preferences

Topic C: 0 Printing a calendar

C-1: Printing a standard calendar

C-2: Using the Quick Print feature

Unit 7 : Opportunity management

Topic A: 0 Viewing opportunities

A-1: Filtering your opportunity list

A-2: Looking up opportunities

A-3: Customizing the columns in the Opportunity List

A-4: Changing the name of an opportunity user field

Topic B: 0 Adding and removing opportunities

B-1: Entering a new opportunity

B-2: Editing an existing opportunity

B-3: Closing an opportunity

B-4: Deleting an opportunity

Topic C: 0 Quotes

C-1: Writing a quote for an opportunity

C-2: Editing a Word quote template

Topic D: 0 Exporting opportunities to Excel

D-1: Exporting an opportunity list to Excel

D-2: Viewing PivotTables and charts

Topic E: 0 The opportunity process

E-1: Creating an opportunity process

E-2: Modifying an existing opportunity process

E-3: Performing a lookup by opportunity stage

Topic F: 0 Maintaining a product list

F-1: Adding new items to a centralized product list

F-2: Modifying a product list

F-3: Importing a product list