



Enhanced Network Solutions Group

Systems Integration • Learning Solutions • CIO Consulting
Managed Outsourcing • Healthcare Solutions • Security Solutions

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ACT! 2009: Level 1

SA-AT-BAS-EK Rev 04.10

1 day

Description

You will launch ACT! 2009 and use it to create a new database, to which you will add contacts. You will find and sort contacts, categorize contacts, schedule activities, manage tasks and conflicts, and work with recurring activities and documents. You will then create sales opportunities for contacts and schedule annual events.

Prerequisites

- *Windows XP: Basic or Windows Vista: Basic*

Course Outline

Lesson 1: Exploring ACT! 2009

Topic 1A: Explore the ACT! Interface

Topic 1B: Access the ACT! Help System

Lesson 2: Managing a Contact Database

Topic 2A: Create a Contact Database

Topic 2B: Add Contacts to a Contact Database

Topic 2C: Locate Contacts in a Database

Topic 2D: Edit Contacts

Topic 2E: Sort Contacts

Topic 2F: Print an Address Book

Topic 2G: Generate Contact Reports

Lesson 3: Organizing Contacts

Topic 3A: Create Companies from Contacts

Topic 3B: Group Contacts

Topic 3C: Manage Contact Groups

Topic 3D: Generate Group Reports

Topic 3E: Communicate Using Email

Lesson 4: Working with Calendars

Topic 4A: Work with Calendar Views

Topic 4B: Schedule Activities

Topic 4C: Manage Activities

Topic 4D: Look Up Annual Events

Topic 4E: Work in the Task List View

Topic 4F: Print a Calendar

Lesson 5: Organizing Sales

Opportunities

Topic 5A: Create Sales Opportunities

Topic 5B: Assign Multiple Contacts to an Opportunity

Topic 5C: Look Up Contact Activity

Lesson 6: Working with a Word Processor

Topic 6A: Create a Document

Topic 6B: Edit a Document

Topic 6C: Format a Document

Topic 6D: Check Spelling

Topic 6E: Attach Documents



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