

ACT 2008: Level 1

1 Day

Prerequisites

- Windows XP Foundation, Windows Vista Foundation, or commensurate knowledge and experience

Objectives

- Explore ACT! 2008.
- Manage a contact database.
- Organize contacts.
- Work with calendars.
- Organize sales opportunities.
- Use the ACT! word processor to create documents you can use to communicate with contacts.

Lesson 1: Exploring ACT! 2008

Lesson 1.1: Explore the ACT! 2008 Interface

Lesson 1.2: Access ACT! 2008 Help

Lesson 2: Managing a Contact Database

Lesson 2.1: Create a Contact Database

Lesson 2.2: Add Contacts to a Contact Database

Lesson 2.3: Locate Contacts in a Database

Lesson 2.4: Edit Contacts

Lesson 2.5: Sort Contacts

Lesson 2.6: Print an Address Book

Lesson 2.7: Generate Contact Reports

Lesson 3: Organizing Contacts

Lesson 3.1: Create Companies from Contacts

Lesson 3.2: Group Contacts

Lesson 3.3: Manage Contact Groups

Lesson 3.4: Generate Group Reports

Lesson 4: Working with Calendars

Lesson 4.1: Work with Calendar Views

Lesson 4.2: Schedule Activities

Lesson 4.3: Manage Activities

Lesson 4.4: Look Up Annual Events

Lesson 4.5: Work in the Task List View

Lesson 4.6: Print a Calendar

Lesson 5: Organizing Sales Opportunities

Lesson 5.1: Create Sales Opportunities

Lesson 5.2: Assign Multiple Contacts to an Opportunity

Lesson 5.3: Look Up Contact Activity

Lesson 6: Working with the Word Processor

Lesson 6.1: Create a Document

Lesson 6.2: Edit a Document

Lesson 6.3: Format a Document

Lesson 6.4: Check Spelling

Lesson 6.5: Attach Documents