

# Course overview:

## Act! 2005 Basic

(S619eng)



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### Overview and objectives

This 1-day course covers the basic functions and features of ACT! 2005. Students will learn how to navigate a database, locate records, create and delete contacts, work with company records, perform lookups and searches, use Contact List view, work with groups, and schedule activities.

On completing this course, students will be able to:

- Start ACT! 2005, navigate through a database, find a specific record, close a database, and close ACT! 2005.
- Find and correct the My Record, create and delete contacts, work with secondary contacts, work with contact names and salutations enter notes for a contact, and attach files to a contact.
- Add and delete a company record, associate contacts with a company, and add a new division within a company record.
- Perform a basic lookup; perform an empty/non-empty and greater than/less than search; replace, add to, and narrow a lookup; and perform a keyword search.
- View contacts in the Contact List view; refine and create a current lookup within the Contact List view; customize the appearance of the Contact List view and export the Contact List view data to Excel.
- Create and delete groups, change group membership, and perform group lookups.
- Navigate the ACT! Calendar views, schedule an activity, and clear an activity.
- Set letter preferences, write a template-based letter, print envelopes, edit envelope templates, print labels, and edit label templates.
- Set e-mail preferences, view e-mail in the ACT! e-mail interface, send e-mail messages to your contacts, and record a history for outgoing e-mails.

### Who should attend?

Before taking this course, students should be comfortable using a personal computer and Windows 2000 or later.

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### Getting started

- Using ACT! 2005 • Navigating in ACT! 2005 • Closing a database

### Working with contacts

- Working with the My Record • Creating and deleting contacts • Working with secondary contacts • Using names and salutations • Entering notes • Attaching files to a contact

### Companies and divisions

- Adding and removing companies • Managing companies • Managing divisions

### Simple lookups

- Performing simple lookups • Performing special lookups • Replacing, adding to, and narrowing lookups • Keyword searches

### Contact List view

- Using the Contact List view • Refining and creating lookups • Customizing the Contact List view • Integrating Microsoft Excel

### Using groups

- Creating and deleting groups • Changing group membership • Working with groups

### Scheduling activities

- Navigating the calendar views • Scheduling activities • Completing activities

### Writing letters

- Setting letter preferences • Creating template-based letters • Printing envelopes • Printing labels

### Using e-mail

- Setting e-mail preferences • Viewing e-mail in ACT! • Composing e-mail messages • Recording e-mail histories

### Internet integration

- Internet integration • Accessing maps and driving directions

### Running reports

- Contact reports • Group and company reports • Opportunity reports • Printing an Address Book

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