

Course overview:

Act! 2005 Advanced

(S620eng)



the courseware
company

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Overview and objectives

In this 1-day course, students will use ACT! 2005 to perform advanced lookups and queries, manage documents and files, work with e-mail templates, and send a mass e-mail message. Students will also learn how to integrate ACT! 2005 and Outlook to send messages and share activities. Students will work with the Task List, creating custom activity types and priorities, work with the calendar feature, and learn how to manage opportunities.

On completing this course, students will be able to:

- Perform advanced lookups and queries.
- Work with document templates and perform a mail merge.
- Manage documents and files.
- Work with e-mail templates and send a mass e-mail message.
- Integrate ACT! 2005 and Outlook to send messages and share activities.
- Work with the Task List, create custom activity types and priorities, create and schedule resources, grant calendar access and print activity calendars.
- Manage opportunities

Who should attend?

This course has been created for individuals wishing to learn the advanced features of ACT! 2005. Students are expected to have a good working knowledge of the Windows XP operating system and to have attended ACT 2005 Basic or have equivalent knowledge or experience.

Advanced lookups and queries

- Advanced queries • Lookups by example • Additional lookups • Company lookups • Group lookups • Opportunity lookups

Performing a mail merge

- Working with document templates • Personalizing document templates • Performing a mail merge

Document and file management

- The Documents tab • Attaching files

Sending mass e-mail messages

- Working with e-mail templates • Performing a mass e-mail merge

Outlook integration

- Specifying Outlook™s ACT! settings • Sending messages to ACT! contacts • Sharing ACT! and Outlook activities
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Advanced activities

- Using the Task List • Managing activity types and priorities • Managing resources • Working with multiple activities • Scheduling an activity series • Workgroup calendar features • Setting activity preferences • Printing a calendar

Opportunity management

- Viewing opportunities • Adding and removing opportunities • Generating quotes • Exporting opportunities to Excel • Managing the opportunity process • Maintaining a product list

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