

# Course overview:

## Act! 2006 Basic

(S650eng)



[www.courseware.co.uk](http://www.courseware.co.uk)  
[sales@courseware.co.uk](mailto:sales@courseware.co.uk)

### Overview and objectives

This 1-day course teaches students how to manage their contact databases effectively. Students will create and modify contact records and company records, and perform simple lookups. They will also create and modify groups, schedule activities, create template-based letters, and compose e-mail messages. Finally, students will work with ACT! and the Internet, and they will generate reports to display contact data.

On completing this course, students will be able to:

- Start ACT! 2006, navigate through a database, find a specific record, close a database, and close ACT! 2006.
- 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-mail messages.
- Attach Web pages to a contact record and generate maps and driving directions.
- Run contact, group, company, and opportunity reports and print an Address Book.

### Who should attend?

The target student for this course should be comfortable using a personal computer and Windows XP. Students should know the basics of using ACT! 2006 Premium. Students will get the most out of this course if their goal is to learn advanced query methods and additional scheduling, e-mailing, and printing techniques to become proficient users of ACT! 2006 Premium.

Students taking this course should be familiar with personal computers and the use of a keyboard and a mouse.

---

# Course overview:

## Act! 2006 Basic

(S650eng)



**the courseware  
company**

[www.courseware.co.uk](http://www.courseware.co.uk)  
[sales@courseware.co.uk](mailto:sales@courseware.co.uk)

### Getting started

- Introducing ACT! • Navigation • Closing databases

### Working with contacts

- My Record • Creating and deleting contacts • Secondary contacts • Names and salutations • Inserting notes • Attaching files to a contact

### Companies and divisions

- Adding and removing companies • Managing companies • Managing divisions

### Simple lookups

- Performing simple lookups • Special lookups • Modifying lookups • Keyword searches

### Contact List view

- Using the Contact List view • Lookups in Contact List view • Customizing the Contact List view • Integrating Microsoft Excel

### Groups

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

### Activities

- Calendar views • Scheduling activities • Completing activities

### Letters

- Letter preferences • Template-based letters • Envelopes • Labels

### E-mail

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

### ACT! and the Internet

- Web integration • Maps and driving directions

### Reports

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

*gtslearning, 1998-2006. All rights reserved. All trademarks are the property of their respective owners*