

Course overview:

Act! 2006 Advanced

(S651eng)



**the courseware
company**

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Overview and objectives

This 1-day course builds on the concepts and skills taught in ACT! 2006: Basic. Coverage includes advanced query methods and additional scheduling, e-mailing, and printing techniques.

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! 2006 and Outlook to send messages and share activities.
- Work with the Task List, create custom activity types and priorities, and create and schedule resources.
- Grant calendar access and print activity calendars.
- Manage opportunities.

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. Furthermore, this course assumes that students have completed the ACT! 2006 Basic course or have equivalent experience.

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Advanced queries and lookups

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

Mail merge

- Document templates • Personalizing document templates • Performing a mail merge

Document and file management

- The Documents tab • File attachments

Mass e-mail messages

- E-mail templates • Mass e-mail merges

Outlook integration

- Outlook's ACT! settings • Sending messages to ACT! contacts • ACT! and Outlook activities

Advanced activities

- The Task List • Activity types and priorities • Resources • Multiple activities • Scheduling an activity series

Calendar settings

- Workgroup calendar features • Calendar and scheduling preferences • Printing a calendar

Opportunity management

- Viewing opportunities • Adding and removing opportunities • Quotes • Exporting opportunities to Excel • The opportunity process • Maintaining a product list

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