

ACT! V11 2010 TRAINING

ACT! Processing

This training program will introduce learners to basic ACT! terms and concepts, and processing options.

Entrance Requirements

Learners need to have completed the Introduction to ACT! course, or at least have had little exposure to ACT!.

Target Learners

Individuals who are required to execute daily processing within ACT!.

Duration

Two Days

Training Investment

R2 400.00 incl VAT

Delivery Methods

Instructor-led, group-paced, classroom-delivery learning model, with structured hands-on activities

Benefits

The course will give you a sound knowledge and understanding of day-to-day processes in ACT!

Course Outline

Filtering Lookup Queries

Familiarise yourself with searching for Contacts.

Working with Contacts

The purpose of this lesson is to demonstrate how contacts are processed and maintained.

Activities and Events

Receive a basic understanding of viewing, scheduling and managing Activities and Events.

Groups and Companies

Organising contacts into Groups and Companies makes it easier to locate, report on and communicate with particular selections of contacts. Create groups, sub groups, Companies and departments, and add contacts to these.

Task List

Enabling the user to view activities for a specific period of time, for example, all activities for the day.

Opportunities and Quote

This Lesson will explain how to use Opportunities to keep track of prospect leads, generate quote and sales related reports.

Documents Tab

The purpose of this lesson will be to familiarise yourself with the Documents Tab within ACT!, with specific emphasis on adding, editing and viewing files.

Replace – Swap - Copy

The purpose of this lesson will be to familiarise yourself with the procedure to replace, swap or copy fields within the Contact Masterfiles in ACT!

Dashboard

The purpose of this lesson will be to familiarise yourself with the Dashboard display within ACT!

Email and Outlook

The purpose of this lesson will be to familiarise you with the built-in email system, as well as integration between ACT! E-mail and Outlook.

Letters and Mail Merges

The purpose of this lesson will be to demonstrate the Letter and Mail Merge functionality from within ACT!, with particular emphasis on creating and saving letter templates, and performing a Mail Merge for multiple contacts.

Import and Export

The purpose of this lesson is to demonstrate how data from external sources can be imported in to ACT!. As well as data export from ACT!.

Customize

The purpose of this lesson will be to demonstrate how to add custom fields and change your database layout to suit your needs

Reporting

The purpose of this lesson will be to familiarise yourself with the list of standard Reports available in ACT!, as well as creating custom Reports

Assessments

Not available.

Booking Your ACT! Training**Step 1:**

To book on one of our training courses, simply contact our training department on 021 447 9565 or alternatively email us at training@e2e.co.za

Step 2:

E2E will then send you an application form, where you will choose the course you would like to enrol for, and simply send it back to us.

Step 3:

We will then await your payment as a confirmation that you are taking the course.

Step 4:

You will then be sent the confirmation dates and location for the course.

Should you need any further information please feel free to contact E2E Business Solutions on 021 447 9565, we would gladly assist you in any way that we can.