



ACT!: Level 1

Course Description

ACT! Level 1 is a hands-on instruction training course that will introduce you to the basics of ACT!, and the concepts of personal information managers.

Course Content

Lesson 1: Overview of ACT!

Topic 1A: ACT! : An Overview

Topic 1B: Viewing & Editing Database Records

Lesson 2: Creating a Contact Database

Topic 2A: Creating a Contact Database

Topic 2B: Editing a Contact Database

Topic 2C: Printing an Address Book

Lesson 3: Locating Contacts

Topic 3A: Finding Contacts

Topic 3B: Viewing Contacts

Topic 3C: Sorting Contacts

Lesson 4: Organizing Contacts

Topic 4A: Categorizing Contacts

Topic 4B: Grouping Contacts

Topic 4C: Managing Contact Groups

Lesson 5: Working with Calendars & Activities

Topic 5A: Working with Calendar Views

Topic 5B: Scheduling Activities

Topic 5C: Working in Task List View

Topic 5D: Managing Activities

Lesson 6: Organizing Sales & Contact Activity

Topic 6A: Creating Sales Opportunities

Topic 6B: Looking Up Contact Activity

Topic 6C: Looking Up Annual Events

Topic 6D: SideACT! - Manage Notes & Activities

Lesson 7: Creating Word Processor Documents

Topic 7A: Creating a Letter

Topic 7B: Formatting Documents

Topic 7C: Viewing Other Templates

Topic 7D: Working with the Library Tab

ACT!: Level 2

Course Description

ACT! Level 1 is a hands-on training course that will introduce you to the advanced features of contact management. You will probably get the most out of this course if you want to learn how to modify templates and reports, perform complex lookups, customize a database, automate procedures, exchange data, perform database maintenance, and link to the Internet..

Course Content

Lesson 1: Creating & Using Queries

Topic 1A: Creating Queries
Topic 1B: Creating Advanced Queries
Topic 1C: Adding Queries to the Lookup Menu

Lesson 2: Creating Macros

Topic 2A: Creating a Macro
Topic 2B: Adding Macros to the Toolbar

Lesson 3: Importing, Exporting, & Synchronizing Data

Topic 3A: Importing Data
Topic 3B: Exporting Data
Topic 3C: Using Hand-held Devices
Topic 3D: Synchronizing Data

Lesson 4: Customizing ACT!

Topic 4A: Specifying Startup Settings
Topic 4B: Modifying Fields in a Database
Topic 4C: Modifying Layouts
Topic 4D: Menus & Keyboard Shortcuts

Lesson 5: Templates & Mail Merge

Topic 5A: Creating a Mail Merge Template
Topic 5B: Generating Form Letters
Topic 5C: Adding Templates - Write Menu

Lesson 6: Customizing Report Templates

Topic 6A: Modifying Report Templates
Topic 6B: Using a Custom Report Template

Lesson 7: Administrating Your ACT!

Topic 7A: Managing Data Security
Topic 7B: Performing System Maintenance

Lesson 8: Internet & E-mail Features

Topic 8A: Internet Services
Topic 8B: Email Functionality