



ACT! 2006: Level 1

Course number: 084739

Course length: 1.0 day

Course Description

You have a large amount of information about your business contacts. You may have to maintain the information in order to access the same as and when required. ACT! 2006 is a personal information system that enables you to track and manage information about business contacts such as addresses, telephone numbers, and appointments.

Course Objective: You will launch ACT! 2006 to create a new database, to which you will add contacts. You will find and sort contacts, categorize contacts, schedule activities, manage tasks and conflicts, and work with recurring activities and documents. You will then create sales opportunities for contacts and schedule annual events.

Target Student: Corporate users, small business owners, government, medical, education, and non-profit entities.

Prerequisites: To ensure your success, it is required that you have basic PC skills and understanding of Windows.

Delivery Method: Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

Performance-Based Objectives

Upon successful completion of this course, students will be able to:

- launch ACT! 2006.
- create a contact database.
- locate contacts based on specific criteria.
- organize contacts.
- work with calendars and activities.
- organize sales opportunities.
- create word processor documents.

Course Content

Lesson 1: Getting Started with ACT! 2006

Topic 1A: Launch ACT! 2006

Topic 1B: Use Online Help

Topic 1C: View Contact Database

Topic 1D: Enter Information in My Record

Lesson 2: Creating a Contact Database

Topic 2A: Add Contacts

Topic 2B: Edit a Contact Database

Topic 2C: Print an Address Book

Lesson 3: Locating Contacts

- Topic 3A: Find Contacts
- Topic 3B: View Contacts
- Topic 3C: Sort Contacts
- Topic 3D: Generate Reports

Lesson 4: Organizing Contacts

- Topic 4A: Categorize Contacts
- Topic 4B: Add Contacts to Companies
- Topic 4C: Group Contacts
- Topic 4D: Create Subgroups
- Topic 4E: Manage Contact Groups
- Topic 4F: Create Group Reports

Lesson 5: Working with Calendars and Activities

- Topic 5A: Work with Calendar Views
- Topic 5B: Schedule Activities
- Topic 5C: Print a Calendar
- Topic 5D: Work in the Task List View
- Topic 5E: Manage Activities
- Topic 5F: Manage Schedule Conflicts
- Topic 5G: Work with Recurring Activities

Lesson 6: Organizing Sales Opportunities and Contact Activity

- Topic 6A: Create Sales Opportunities
- Topic 6B: Look Up Contact Activity
- Topic 6C: Look Up Annual Events

Lesson 7: Creating Word Processor Documents

- Topic 7A: Create a Letter
- Topic 7B: Open an Existing Document
- Topic 7C: Format a Document
- Topic 7D: Check Spelling
- Topic 7E: View Other Templates
- Topic 7F: Work with the Documents Tab