

## Course Information

**Duration:** Courses commence at 10.00am and aim to finish by 16.00. An hour has been set aside for lunch with further time allowed for refreshment breaks.

**Target Audience:** This course has been designed to introduce new users to ACT! 2010. It is presumed that delegates will be familiar with using Windows and MS Office Suite to a competent level.

**Course Objectives:** To provide a high degree of hands-on, intensive training on ACT! 2010. When delegates return to the workplace they will be able to effectively and efficiently utilise the basic features of ACT! on a daily basis.

## Course Details

### Screen Layout and Navigation

- Screen Views & Toolbars
- Groups view
- Companies view

### Working with Contacts

- Searching for Contacts
- Creating new Contacts
- Adding and Editing Information
- Deleting Contacts

### Working with activities

- Viewing and filtering activities in the contact view
- Viewing and filtering activities in the task list view
- Viewing and filtering activities in the calendars
- Clearing activities in all three views

### Introduction to Sales Opportunities

- Creating a new opportunity
- Editing opportunities
- Closing a sale won or lost
- Running basic opportunity report

### Working with Groups and Companies

- Creating Companies
- Company management
- Setting up and running Company rules
- Group and sub-group creation
- Group management
- Setting up and running Group or subgroup rules

### Notes & Histories

- Attaching Documents and Files to History
- Scheduling activities with contacts

MAS offer a variety of flexible training options. To discuss your company's training requirements and get advice on the most cost effective training for you, please call the MAS Team who will do their best to help 0844 7454588.