

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: Delegates will be expected to have either completed the basic training course or have previous experience of working with ACT! on a day to day basis.

Course Objectives: This is a one day course designed to increase the delegate's knowledge to all of ACT!'s functions. By the end of this course delegates can expect to be able to use ACT! to its fullest as a contact relationship management software package and a sales and marketing tool.

Course Details

ACT! on the network

- Understanding how ACT! works on a SQL based network
- Location of the ACT! folders and program files
- Understanding ACT! Outlook Integration

Working with contact data

- Importing and exporting to and from ACT!
- Exporting Contacts, Groups or Companies
- Exporting partial contact information

Sharing ACT! with remote users

- Understanding synchronisation
- How to synchronise your database

Creating & Editing Reports

- Understanding ACT! reports
- Creating new reports templates
- Editing existing report templates

Working with new ACT! databases

- Creating a new ACT! database
- Understanding the ACT! User and the "My Record"
- Adding, deleting and reassigning users
- Managing users and their security role

Database Maintenance

- Scanning for duplicates
- Clearing old Notes, Histories and Activities
- General Do's and Don'ts for database integrity
- Some common error messages
- When to call an expert

Customising ACT!

- Understanding system fields
- Understanding the use of layouts
- Understanding the field definitions and their uses
- Creating Custom fields
- Customising and or editing existing layouts

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 0870 873 4588.