

ON LINE SERVICES

Computer Training & Support

ACT! 4.0 Introduction

Course description

Students will learn the fundamentals of contact management using ACT! 4.0.

Objectives

- Open an existing database and become familiar with the ACT! environment.
- Create and edit a database.
- Locate contact records by using the Lookup feature and the Contact List window.
- Organize and manage contact records by creating groups.
- Schedule and manage activities, notes, and records by using the Activities tab and SideACT!.
- Schedule and manage activities by using the calendar windows and the Task List window.
- Create, edit, and format a document by using the ACT! word processor.
- Communicate electronically with contacts by creating and sending email messages.

Course content

Lesson 1: Overview of ACT!

- Starting ACT!
- Observing a contact database

Lesson 2: Creating a contact database

- Creating a contact database
- Editing a contact database
- Printing an address book

Lesson 3: Locating contacts

- Finding contacts
- Viewing contacts
- Sorting contacts

Lesson 4: Organizing contacts

- Categorizing contacts
- Grouping contacts
- Managing contact groups

Lesson 5: Scheduling activities

- Scheduling activities in the Contact window
- Managing activities
- Scheduling recurring activities

Lesson 6: Working in other windows

- Working in the calendar windows
- Working in the Task List window
- Using SideACT! to manage notes and activities

Lesson 7: Creating documents

- Creating a letter
- Formatting documents
- Viewing other templates

Lesson 8: Electronically communicating with contacts

- Creating and sending email
- Advanced email techniques
- Preparing to work off-line
- Creating and sending faxes
- Using the ACT! dialer to make calls

