

| WEEK 1 | WEEK 2 | WEEK 3 | WEEK 4 | WEEK 5 |
|--|---|---|---|--|
| <p>Working with Contacts</p> <p>Opening ACT!</p> <ul style="list-style-type: none"> .Opening ACT! from the Start Menu .Opening ACT! from the Desktop .Creating a New Database .Opening a Database <p>The ACT! Interface</p> <ul style="list-style-type: none"> .Identifying Key Elements of the ACT! Interface <p>Launching ACT!'s Views</p> <ul style="list-style-type: none"> .Setting View Bar Options .Launching the Contact View .Launching the Contact List View .Launching the Groups View .Launching the Task List .Launching the Daily Calendar .Launching the Weekly Calendar .Launching the Monthly Calendar .Launching the Email View .Launching the Internet Services View <p>Launching Contact View Tabs</p> <ul style="list-style-type: none"> .Launching the Contact View Tab <p>The My Record</p> <ul style="list-style-type: none"> .Find and Correct the My Record <p>Creating & Deleting Contacts</p> <ul style="list-style-type: none"> .Inserting a Contact .Duplicating a Contact .Deleting Contacts <p>Understanding Names & Salutations</p> <ul style="list-style-type: none"> .Specifying a Contact's First & Last Names .Setting Names Preferences <p>Entering Notes for a Contact</p> <ul style="list-style-type: none"> .Inserting a Note for a Contact <p>Attaching Files to a Contact</p> <ul style="list-style-type: none"> .Attaching a File to a Contact Record .Viewing an Attached File | <p>Basic Lookups</p> <p>Simple Lookups</p> <ul style="list-style-type: none"> .Looking Up All Contacts .Looking Up on Basic Fields .Looking Up on Other Fields <p>Looking Up Empty/Non-Empty Fields</p> <ul style="list-style-type: none"> .Looking up Empty Fields .Looking Up Non-Empty Fields <p>Replacing/Adding/Narrowing Lookups</p> <ul style="list-style-type: none"> .Replacing a Lookup .Adding to a Lookup .Narrowing a Lookup <p>Annual Events Lookups</p> <ul style="list-style-type: none"> .Looking Up Annual Events <p>Contact Activity Lookups</p> <ul style="list-style-type: none"> .Looking Up Modified Contacts <p>Keyword Searches</p> <ul style="list-style-type: none"> .Searching for a Specific Keyword .Keyword Searching Email Addresses <p>Lookups By Example</p> <ul style="list-style-type: none"> .Searching for a Field Value .Searching for Multiple Field Values .Using Query Operators in a Lookup <p>By Example</p> | <p>Using the Contact List View</p> <p>Contact List View Basics</p> <ul style="list-style-type: none"> .Launching the Contact List View .Sorting Contacts <p>Customizing the Contact List View</p> <ul style="list-style-type: none"> .Adding Columns .Removing Columns .Rearranging Columns .Splitting the Contact List View <p>The Edit Mode</p> <ul style="list-style-type: none"> .Switching to the Edit Mode .Using the Edit Mode <p>The Tag Mode</p> <ul style="list-style-type: none"> .Switching to the Tag Mode .Building a Lookup in the Tag Mode .Refining a Lookup in the Tag Mode | <p>Using Groups</p> <p>Creating Groups</p> <ul style="list-style-type: none"> .Creating a Group .Creating a Subgroup .Deleting Groups or Subgroups .Renaming an Existing Group <p>Changing Group Membership</p> <ul style="list-style-type: none"> .Adding Contacts to a Group .Removing Contacts from a Group .Adding the current lookup to a Group .Changing Group Membership in the Contact View <p>Looking Up Contacts in a Group</p> <ul style="list-style-type: none"> .Looking Up Group Members from the Contact View .Viewing Group Members in the Groups View <p>Defining Group Rules</p> <ul style="list-style-type: none"> .Defining Field Values Rules .Defining Saved Query Rules .Running Group Rules | <p>Scheduling Activities</p> <p>Navigating the Calendar Views</p> <ul style="list-style-type: none"> .Viewing the Daily Calendar .Viewing the Weekly Calendar .Viewing the Monthly Calendar .Using the Mini Calendar .Filtering the Calendar <p>Scheduling Activities</p> <ul style="list-style-type: none"> .Scheduling an Activity .Editing an Existing Activity .Rescheduling an Activity <p>Completing Activities</p> <ul style="list-style-type: none"> .Clearing an Activity .Erasing an Activity .Recording a History of an Unscheduled Activity <p>Using the Task List</p> <ul style="list-style-type: none"> .Editing Activities in the Task List .Sorting the Task List .Changing Task List Columns .Filtering the Task List |

| WEEK 6 | WEEK 7 | WEEK 8 | WEEK 9 | WEEKS 10 - 12 |
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| <p>Sales/ Opportunities</p> <p>Adding Opportunities .Entering a New Opportunity .Editing an Existing Opportunity</p> <p>Completing an Opportunity .Completing an Opportunity .Deleting an Opportunity</p> <p>Viewing Opportunities .Viewing Opportunities for a Contact .Viewing Opportunities for a Group of Contacts</p> <p>Managing the Sales Process .Modifying Sales Stages .Looking Up Contacts by Sales Stage</p> <p>Running Sales Reports .Running Sales/Opportunity Reports .Filtering Opportunity Reports .Running Sales Graphs .Running Sales Pipeline</p> | <p>Library Tab</p> <p>Adding Documents .Adding a Document to the Library Tab</p> <p>Viewing Documents .Viewing Documents in the Library Tab</p> <p>Editing Documents .Editing a Library Tab Document</p> <p>Mapping ACT! Fields to Excel</p> <p>Spreadsheets .Mapping ACT! Fields to Excel</p> <p>Internet Features</p> <p>Internet Services .Viewing a Web Page in ACT! .Launching Web Sites in URL Fields</p> <p>Attaching Web Pages to Contacts .Attaching a Web Page to a Contact .Viewing an Attached Web Page</p> | <p>Writing Letters</p> <p>Setting Letter Preferences .Setting Word Processor Preferences</p> <p>Writing a Template-Based Letter .Writing Letters, Memos, and Fax Cover Pages .Writing Other Template-Based Letters .Creating a History of a Letter Sent</p> <p>Printing Envelopes .Printing Standard Envelopes .Creating Envelope Templates .Editing Envelope Templates</p> <p>Printing Labels .Printing Standard Avery Labels .Creating Non-Standard Label Templates</p> | <p>Viewing & Composing Email</p> <p>Setting Email Preferences .Setting Email Preferences</p> <p>Viewing Email in ACT! .Checking Your Messages .Creating New Email Folders .Moving Messages Into a Folder</p> <p>Composing an Email in ACT! .Composing a Message to an ACT! Contact .Composing a Message to a Non-ACT! Contact</p> <p>Writing Reports</p> <p>Writing Reports .Writing a Contact Report .Writing a Notes/History Report .Writing an Activities/Time Spent Report</p> <p>Filtering a Report .Filtering an Activities Report .Filtering a Notes/History Report</p> | <p>Applying Your New Knowledge To Your Business</p> <p>Customer retention</p> <p>Increasing referrals</p> <p>Getting references</p> <p>Testimonial letters</p> <p>Prospect follow up</p> <p>Increasing share of wallet</p> |