



# Certified act! Consultant since 1989

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Cost/user	Workshop	Length	Prerequisites
\$329.00	A - act! PowerUser	1 Day	Basic understanding of windows including mouse
\$499.00	B - act! Turbo User	1 Day	Completion of act! Power-User Workshop
\$999.00	C - act! Administrator	3 Days	Completion of act! Power-User Workshop
\$329.00	D -act! Fast Pace	1 Day	existing <b>act</b> users who want to learn at a fast pace
\$329.00	E - act! Management Overview	1/2	Management who want to get the 1000 foot version
\$399.00	F - act! One-on-One	1/2	Individual One-on-one customized training

**act! Power User** - Self taught users typically use only 10% to 15% of **act!** With this class, both new and experienced users will master the use of up to 75% of the powerful features of **act!**

**act! Turbo User** - Picks up where the Power-user class ends. Learn to create streamlined reports and users, basic database management and customization, setting up your phone system, and more!

**act! Administrator** - This is for companies which want their personnel to support the Customer Relationship management system. It covers all configuration and setup options, data synchronization and maintenance of a large, multi-user typically multi-site) database. This does NOT include anything with the ACT! web version.

**act! Fast Pace** - a new tool for the seasoned act! user to make them faster doing their job better. Regardless if their job is administration, outside sales, inside sales, field sales or sales management, this class will give you the tools to increase your production.

**act! Management Overview** - an act! overview for management whose organization is using act! This class will give you the tools to pull the information you need.

All of our Workshops can be held on-site and they can be customized to fit the needs of the client

**Project Management** - a 3 - 5 day **workshop on Project Management**. This workshop will give you the skills to to Project Management. Please request more information on the details of these classes.

PowerUser	TurboUser	Administrator	Fast Pace	Mgt Overview
A	B	C	D	E

### Introduction

●			●	●	Record creator vs record manager
●			●	●	User Permissions
●			●	●	Teams
●			●	●	Using Notes vs History
●			●	●	Discussing 13 Views
●			●	●	Calendars: viewing yours and others
●			●	●	Relationships
			●	●	Relating Contacts to Companies
			●	●	Annual Events

### Task List

●			●		Filtering Task List
●			●		Printing Task List
●			●	●	Using the Task List

### act! Data

●					Moving data massively within act!
●			●	●	Coping with Duplicate Contacts within act!
●			●	●	Public vs Private
			●	●	Dynamic Groups & Companies
			●	●	Copy or move contact data
			●	●	Using Excel to fix everything wrong

PowerUser	TurboUser	Administrator	Fast Pace	Mgt Overview
A	B	C	D	E

### Sales and Sales Management

●			●	●	Sales Process & Sales Goals
●			●	●	Sales Opportunities & development
●			●	●	Using E-Marketing
			●	●	History List
		●	●	●	Printing Sales Reports
		●	●	●	Reviewing Sales Funnel
●			●	●	Reviewing Graphing data
			●	●	Placing Calls via act!
			●	●	Recording History of activities
			●	●	Scheduling Activities
			●	●	Secondary Contacts
			●	●	Attaching Files

### Dashboards

●			●	●	Review the 6 standard views
●			●	●	Customize Dashboard
●			●	●	Filtering
●			●	●	Lookup by Example
●			●	●	Using the Dashboard to make \$\$\$\$

Power User	Turbo User	Administrator	Fast Pace	Mgt Overview
A	B	C	D	E

### Smart Tasks

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- Setting up Smart Tasks
- Assessing Smart Tasks
- Prerequisites for Smart Tasks
- Smart Task Templates Tab
- Add/Create a Smart Task
- Running Smart Tasks
- Adding /Editing/Deleting Steps
- Pending Smart Task Steps

A	B	C	D	E
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- ### Generating Letter Templates
- Creating and Editing Templates
  - Generating Standard Templates
  - Creating and Editing Templates
  - Printing Reports

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- ### Creating/Modifying Reports
- Creating Labels and Envelopes
  - Modifying Reports
  - Creating Reports from Scratch
  - What reports can't run in **act!**

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- ### Managing Series of Activities
- Preparing Scheduling Series
  - Using Series
  - Using Series for Multiple Contacts

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- ### Editing and Clearing Activities
- Creating Call, Meeting, ToDo's
  - Clearing Calls, Meeting, ToDo's
  - Integrating activities with History
  - Editing Activities

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- ### Using Groups/Companies
- Creating (Static & Dynamic)
  - Layouts
  - Membership
  - Reports
  - Lookups within Groups/Companies
  - Linking Contacts to Companies

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- ### Writing Letters / e-Mail
- Template Letters
  - Sending mass e-mails via Outlook
  - Sending mass e-mails via SwiftPage

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- ### Synchronization
- Setting up Synchronization
  - Establishing and operating Synch
  - Initialize Daily Sync Process

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- ### e-Marketing
- Understanding e-Marketing
  - Features & Benefits
  - Drip Marketing
  - Marketing Results Tab

Power User	Turbo User	Administrator	Fast Pace	Mgt Overview
A	B	C	D	E

### Databases Management

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- Reindexing a Database
- Compressing a Database
- Purging Notes and History
- act!** Scheduler
- act!** Scratch Pad
- Requirements for Server
- Backing up **act!**
- Security and Menu Rights
- Database Problems
- act!** Common Problems
- Diagnosing Problems
- Modifying a Layout

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- ### Lookups
- Performing a Simple Lookup
  - Keyword Searches
  - Sorting with Lookup
  - Lookup by Example

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- ### Advanced Lookups
- Performing Advanced Lookups
  - Query Templates
  - Sorting Saving, & Editing
  - Contact Activities
  - Advanced Searching
  - Annual Events
  - Keyword Searches

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- ### Database Customization
- Customized Field Labels
  - Setting Field Attributes
  - Defining Default Entries
  - Preferences and Path Defaults
  - Customizing Icon and Status Bars
  - Creating, & Updating Layouts
  - Modifying the Menus
  - Macros
  - Calculate Fields

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- ### Exporting, Importing Contacts
- Exporting Contacts to **act!** Databases
  - Exporting Contacts to Other Programs
  - Exporting Documents and Templates
  - Template Files
  - Moving Imported Files
  - Importing Databases and Documents
  - Importing Other File Formats
  - Merging Data with **act!**
  - Direct Links with **act!**

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- ### Connecting with ...
- Connecting to Outlook
  - Connecting to Google
  - Social Updates

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- ### e-Newsletters
- Discuss benefits, & methodology
  - Designing a system