



**ACT! 2008: Level 1**  
**1 day – Instructor led**

**Course Description**

Business contacts and information need to be properly maintained so that you can access or modify them whenever required. ACT! 2008 is a contact management system that will help you work with your business contacts, manage events, track related communications, and enhance your business relationships significantly.

**Course Objective:** You will launch ACT! 2008 and use it to create a new database, to which you will add contacts. You will find and sort contacts, categorize contacts, schedule activities, manage tasks and conflicts, and work with recurring activities and documents. You will then create sales opportunities for contacts and schedule annual events.

**Target Student:** This course is intended for corporate users; small business owners; and government, medical, education, and non-profit entities.

**Prerequisites:** To ensure your success, it is required that you have basic PC skills and an understanding of Microsoft® Windows®.

**Performance-Based Objectives:**

Upon successful completion of this course, students will be able to:

- Explore ACT! 2008.
- Manage a contact database.
- Organize contacts.
- Work with calendars.
- Organize sales opportunities.
- Use the ACT! word processor to create documents you can use to communicate with contacts.



## **Course Content**

### **Lesson 1: Exploring ACT! 2008**

Topic 1A: Explore the ACT! 2008 Interface  
Topic 1B: Access ACT! 2008 Help

### **Lesson 2: Managing a Contact Database**

Topic 2A: Create a Contact Database  
Topic 2B: Add Contacts to a Contact Database  
Topic 2C: Locate Contacts in a Database  
Topic 2D: Edit Contacts  
Topic 2E: Sort Contacts  
Topic 2F: Print an Address Book  
Topic 2G: Generate Contact Reports

### **Lesson 3: Organizing Contacts**

Topic 3A: Create Companies from Contacts  
Topic 3B: Group Contacts  
Topic 3C: Manage Contact Groups  
Topic 3D: Generate Group Reports

### **Lesson 4: Working with Calendars**

Topic 4A: Work with Calendar Views  
Topic 4B: Schedule Activities  
Topic 4C: Manage Activities  
Topic 4D: Look Up Annual Events  
Topic 4E: Work in the Task List View  
Topic 4F: Print a Calendar

### **Lesson 5: Organizing Sales Opportunities**

Topic 5A: Create Sales Opportunities  
Topic 5B: Assign Multiple Contacts to an Opportunity  
Topic 5C: Look Up Contact Activity

### **Lesson 6: Working with the Word Processor**

Topic 6A: Create a Document  
Topic 6B: Edit a Document  
Topic 6C: Format a Document  
Topic 6D: Check Spelling  
Topic 6E: Attach Documents



**ACT! 2008: Level 2**  
1 day – Instructor led

### **Course Description**

In the first course in this series, ACT!® 2008 : Level 1, you gained the basic skills required to organize contact information in a database. In addition to organizing and working with data, you might also want to retrieve specific information about your contacts, send email to them, and also maintain information without any data loss. In this course, you will customize the ACT! 2008 environment, query and exchange data, work with templates, administer ACT!, and use its Internet features.

**Course Objective:** You will customize the ACT! 2008 environment, query and exchange data, work with templates, administer ACT!, and use its Internet features.

**Target Student:** This course is intended for corporate users, small business owners, government, medical, education, and nonprofit entities.

**Prerequisites:** Students enrolling to this course should have basic PC skills and understanding of Windows. Before taking this course, the student should have completed the following course: ACT! 2008: Level 1; or have equivalent knowledge.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### **Performance-Based Objectives**

Upon successful completion of this course, students will be able to:

- Customize the ACT! 2008 environment.
- Query a database.
- Exchange data.
- Work with the mail merge feature.
- Work with report templates.
- Administer the ACT! 2008 database.
- Use the Internet and email features of ACT! 2008.



## **ACT! 2008: Level 2 continued**

### **Lesson 1: Customizing the ACT! 2008 Environment**

- Topic 1A: Specify Startup Preferences
- Topic 1B: Customize Fields in a Database
- Topic 1C: Customize Layouts
- Topic 1D: Customize the Dashboard
- Topic 1E: Modify Menus and Keyboard Shortcuts

### **Lesson 2: Creating Queries**

- Topic 2A: Perform a Lookup
- Topic 2B: Create Advanced Queries

### **Lesson 3: Exchanging Data**

- Topic 3A: Import Data
- Topic 3B: Export Data
- Topic 3C: Transfer Data to a Pocket PC
- Topic 3D: Working with a Remote Database

### **Lesson 4: Using the Mail Merge Feature**

- Topic 4A: Create a Template for Mail Merge
- Topic 4B: Generate Form Letters

### **Lesson 5: Working with Report Templates**

- Topic 5A: Generate Reports Using a Standard Report Template
- Topic 5B: Generate Reports Using a Custom Report Template

### **Lesson 6: Administering the ACT! 2008 Database**

- Topic 6A: Manage Data Security
- Topic 6B: Perform Database Maintenance

### **Lesson 7: Using the Internet and Email Features of ACT! 2008**

- Topic 7A: Create Web Page Attachments
- Topic 7B: Generate Maps and Driving Directions
- Topic 7C: Integrate ACT! 2008 with Email Applications