



9 to 9:10	<b>Introductions</b>
9:10 to 9:30	<b>The Basics</b> <ul style="list-style-type: none"> <li>• Log on</li> <li>• ACT! Screen Elements</li> <li>• Contact Record Basics</li> <li>• Create New Contact</li> </ul>
9:30 to 9:45	<b>Working with Contacts</b> <ul style="list-style-type: none"> <li>• Locating Contacts</li> <li>• Contact List – Customizing, Sorting, Reporting, Exporting</li> <li>• Lookup Variations</li> <li>• Secondary Contacts</li> <li>• Taking Notes</li> </ul>
9:45 to 10:30	<b>Working with your Schedule</b> <ul style="list-style-type: none"> <li>• Activities</li> <li>• Using the Calendar</li> <li>• Calendar v Task List</li> <li>• Task List</li> <li>• Clearing Activities</li> <li>• Recording History</li> <li>• Advanced Options</li> <li>• Preferences</li> </ul>
10:30 to 10:45	<b>Break</b>
10:45 to 11:10	<b>Working with Paper</b> <ul style="list-style-type: none"> <li>• Creating Letters, Memos and Fax Covers</li> <li>• Custom Templates</li> <li>• Attaching to History Tab</li> <li>• Envelopes and Mailing</li> <li>• Reports</li> </ul>
11:10 to 11:30	<b>Working with Emails</b> <ul style="list-style-type: none"> <li>• Set Up</li> <li>• Outlook</li> <li>• Email Merge</li> <li>• Mass Emails</li> </ul>
11:30 to 11:45	<b>Working with Groups and Companies</b> <ul style="list-style-type: none"> <li>• Displaying a Group Lookup</li> <li>• Manually Adding a contact to a group</li> </ul>
11:45 to noon	<b>Wrap Up and Questions</b>