



ACT! Training  
Program  
Complete Agenda

---

<b>Lookups</b>	
9:45 to 10:00	Login
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	Why Lookups are so important What can you find?
10:10 to 10:15	Easy Lookups <ul style="list-style-type: none"><li>• Last Name</li><li>• Company</li><li>• By City</li></ul>
10:15 to 10:25	Double Look-ups <ul style="list-style-type: none"><li>• Replace</li><li>• Add to</li><li>• Narrow</li><li>• Empty</li><li>• Non-Empty</li></ul>
10:25 to 10:35	Other Interesting Fields <ul style="list-style-type: none"><li>• Create Date</li><li>• Edit Date</li></ul>
10:35 to 10:45	Create Group from Lookup
10:45 to 10:50	Keyword Search
10:50 to 11:00	Questions

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program

Complete Agenda

---

<b>Advanced Lookups</b>	
9:45 to 10:00	Login
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	Review Basic Lookups
10:10 to 10:15	Keyword Search <ul style="list-style-type: none"><li>• Preferred Location</li></ul>
10:15 to 10:25	Annual Events – Why use them?
10:25 to 10:30	Lookup By Example
10:30 to 10:35	Contact Activity
10:35 to 10:50	Advanced Queries
10:50 to 11:00	Questions

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program  
Complete Agenda

---

<b>List Views</b>	
9:45 to 10:00	Login
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	What is so great about the Contact List View?
10:10 to 10:20	When do you see List Views? Where do you see List Views?
10:20 to 10:25	Why you need to change List views? How to Customize Columns
10:25 to 10:40	Contact List View <ul style="list-style-type: none"><li>• Sorting</li><li>• Edit Mode</li><li>• Tag Mode</li><li>• Omit Selected</li><li>• Lookup Selected</li></ul>
10:40 to 10:50	Task List Filter
10:50 to 11:00	Questions

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program  
Complete Agenda

---

Activities	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	What's so great about ACT!'s activities, anyway? Who then What Setting your preferences
10:10 to 10:15	Finding your contact
10:15 to 10:20	Scheduling Calls Scheduling To Dos Scheduling Meetings
10:20 to 10:30	Four places activities appear Exporting to Excel
10:30 to 10:40	Managing your Task List – Sorting, Filtering, Creating Lookups Intro to Your Efficient Dashboard
10:40 to 10:45	Why you need to clear your Activities Where do they go?
10:45 to 11:00	Questions and Answers

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program  
Complete Agenda

---

Advanced Activities	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	What's so great about ACT!'s activities, anyway? Who then What
10:10 to 10:15	Finding your contact
10:15 to 10:20	Scheduling Calls Scheduling To Dos Scheduling Meetings
10:20 to 10:30	Four places activities appear
10:30 to 10:40	Managing your Task List – Sorting, Filtering, Creating Lookups Intro to Your Efficient Dashboard
10:40 to 10:45	Why you need to clear your Activities Where do they go?
10:45 to 11:00	Questions and Answers

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program  
Complete Agenda

---

Email and Swiftpage Email	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	Overview of using ACT! with Outlook Overview of using ACT! with SwiftPage Email
10:10 to 10:15	Setting up ACT! to work with Outlook Best preferences Setting up your Address Book in Outlook
10:15 to 10:20	Recording emails with Outgoing email messages Recording Options Default Options
10:20 to 10:30	Recording emails for incoming emails Creating ACT! Contacts from Outlook Creating ACT! Activities from Outlook
10:30 to 10:40	Swiftpage Email Installing it Why do I need Swiftpage if I have Outlook?
10:40 to 10:45	Create a new template Send out a template Changing a template Reports
10:50 to 11:00	Questions and Answers

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



# ACT! Training Program

## Complete Agenda

---

Groups: Static and Dynamic	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	Why should I use groups? What is a Static Group? What is a Dynamic Group? When do I use a Static Group? When do I use a Dynamic Group? Why would I use a Group and not a field? The Biggest Gotcha!
10:10 to 10:25	Static Groups <ul style="list-style-type: none"><li>• Creating</li><li>• Populating</li><li>• Finding</li><li>• Cool applications for groups</li></ul>
10:25 to 10:45	Dynamic Groups <ul style="list-style-type: none"><li>• Creating a query</li><li>• Populating</li><li>• Finding and checking</li><li>• Cool applications for groups</li></ul>
10:45 to 10:50	A few things to note <ul style="list-style-type: none"><li>• Dynamic groups membership button</li><li>• Naming groups</li><li>• Groups and subgroups</li></ul>
10:50 to 11:00	Questions and Answers

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



# ACT! Training Program

## Complete Agenda

---

<b>Groups: Static and Dynamic</b>	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	Why should I use groups? What is a Static Group? What is a Dynamic Group? When do I use a Static Group? When do I use a Dynamic Group? Why would I use a Group and not a field? The Biggest Gotcha!
10:10 to 10:25	Static Groups <ul style="list-style-type: none"> <li>• Creating</li> <li>• Populating</li> <li>• Finding</li> <li>• Cool applications for groups</li> </ul>
10:25 to 10:45	Dynamic Groups <ul style="list-style-type: none"> <li>• Creating a query</li> <li>• Populating</li> <li>• Finding and checking</li> <li>• Cool applications for groups</li> </ul>
10:45 to 10:50	A few things to note <ul style="list-style-type: none"> <li>• Dynamic groups membership button</li> <li>• Naming groups</li> <li>• Groups and subgroups</li> </ul>
10:50 to 11:00	Questions and Answers

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program  
Complete Agenda

---

Companies	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	What are Companies? How are Companies different from Groups? How are they the same?
10:10 to 10:25	Creating Companies <ul style="list-style-type: none"><li>• Create a Contact from a Company</li><li>• Create a Company from a Contact</li></ul>
10:25 to 10:45	Linking Contacts <ul style="list-style-type: none"><li>• Link contact to existing Company</li><li>• Associating a Contact to Company</li></ul>
10:45 to 10:50	A few things to note <ul style="list-style-type: none"><li>• Deleting Contacts</li><li>• History/Notes for Companies</li><li>• Activities for Companies</li></ul>
10:50 to 11:00	Questions and Answers

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program  
Complete Agenda

---

Opportunities	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	What are Opportunities? why should I use them
10:10 to 10:20	Creating an Opportunity <ul style="list-style-type: none"><li>• Three (and more!) places to see opportunities</li></ul>
10:15 to 10:30	Customizing the Pipeline
10:30 to 10:40	Following the Pipeline
10:40 to 10:50	Opportunity List Dashboard
10:50 to 11:00	Questions and Answers

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program  
Complete Agenda

---

Outgoing Communications	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	I didn't know you could do that in ACT! What is a Mail Merge? Labels and Envelopes
10:10 to 10:20	Merging an existing template <ul style="list-style-type: none"><li>• Create a Lookup</li><li>• Write a letter</li><li>• Make an envelope</li></ul>
10:15 to 10:30	Creating a new template
10:30 to 10:40	Envelopes and Labels <ul style="list-style-type: none"><li>• Understanding</li><li>• Creating</li><li>• Gotchas!</li></ul>
10:40 to 10:45	SwiftPage Email information
10:45 to 11:00	Questions and Answers

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program  
Complete Agenda

---

Maintenance	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	I didn't know I had to do Maintenance on my database
10:10 to 10:20	Why you have to backup your database <ul style="list-style-type: none"><li>• Where?</li><li>• How often?</li><li>• But my computer backs up, so I am OK</li></ul>
10:15 to 10:20	Check and Repair a Database
10:20 to 10:40	Dealing with Duplicates <ul style="list-style-type: none"><li>• Duplicate Checking</li><li>• Add-on</li><li>• Small problem, easy solution</li><li>• Big problem, ACT! solution</li></ul>
10:40 to 10:50	Exporting Data Importing Data
10:50 to 11:00	Questions and Answers

To register for a class, please visit our website or contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)



ACT! Training  
Program  
Complete Agenda

---

Customizing your Database for your Needs	
9:45 to 10:00	Get Logged in
10:00 to 10:05	Introductions and Housekeeping Items
10:05 to 10:10	I want to track something What is a field? When should I use field, when should I use groups? Contact fields, Group fields, and Company Fields
10:10 to 10:15	Step 1: Backup Database
10:15 to 10:30	Step 2: Create new Fields <ul style="list-style-type: none"><li>• Field Type</li><li>• Default</li><li>• Character</li></ul>
10:30 to 10:45	Step 3: Add new field to Layout
10:45 to 11:00	Questions and Answers

To register for a class, please visit our website or  
contact us at

303-774-8202 or [Allison@shift7consulting.com](mailto:Allison@shift7consulting.com)