



ACT! Customization and Administration Training Class

Class Overview

This class is ideal for either a corporate "ACT! Administrator" responsible for customizing a shared database on a network or a single user looking for a greater degree of ACT! customization (fields and layout) and productivity. This class will review database design principles, as well as tips & tricks for easy customization. Installation and maintenance of ACT! on a network will also be covered.

This class is very interactive with hands-on instruction, using state-of-the-art laptops in our custom designed-classroom. You will receive a manual for reference, a quick reference sheet for frequently used functions and other valuable tools. This class is taught by an ACT! Premier Trainer/ACT! Certified Consultant and is limited to 6 students – register early! Continental breakfast, lunch and breaks are included in your day.

Prerequisites

- AspenTech's Power User class or equivalent knowledge (discuss with trainer.)
- Functional understanding of Microsoft Office skills in Word, Excel and Outlook.
- Basic understanding of Windows file and folder permissions.

Location

AspenTech Consulting Group: 471 W. Ann Arbor Trail, Plymouth, Michigan 48170

Class Agenda

- General
 - Basic Needs Assessment: The Logic Behind the Database
- Customizing ACT!
 - Creating Databases
 - Adding and Modifying Data Fields & Layouts
 - Adding Custom Tabs
 - Customizing the Sales Process & Opportunities
 - Adding Custom Activities
 - Customizing Templates for Mail Merges – Written & Email
 - Designing ACT! Reports Custom Events
 - Customizing Menus & Toolbars
- ACT! Administration
 - ACT! Installation & Optimization
 - Multi-User Database Configuration
 - User Roles, Permissions & Security
 - Database Maintenance
 - Advanced Lookups & Queries
 - Synchronization
 - Conversion of Older ACT! Databases
- Wrap Up
 - Top 3 Tasks for Getting Started
 - Summary of Tools and References



Contact

Call or email Marshall Knapp mknapp@aspen-tech.com with any questions about the training class. Toll free: 866-880-4ACT (4228)

Class Fee

- \$475.00 per student.

Promotional Discount

- Register for both our Power User class and the Customization & Administration class at the same time and get a 10% discount on both classes.
- Register a two or more individuals from your company at the same time for any single AspenTech class and get a 10% discount for each student.

Cancellation Policy

All class fees are payable at the time of registration and are nonrefundable. AspenTech reserves the right to cancel a class due to low enrollment. If AspenTech cancels a class, the registrants can apply the registration fee from the canceled class to