



ACT! Power User Training Class

Class Overview

This class is designed for ACT! users at all levels who are ready to improve their skills. If you're looking to really maximize the power of ACT! and increase your effectiveness using it, then this class is the right one for you.

Each student will receive hands-on instruction, using state-of-the-art laptops in our custom designed-classroom in Plymouth. 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 8 students. Continental breakfast, lunch and breaks are included in your day.

Prerequisite:

- Students will find it helpful to have an introductory knowledge of ACT!.
- Functional understanding of Microsoft Office skills in Word, Excel and Outlook.

Location:

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

Class Agenda

- Getting Started with ACT!
 - The Many views of ACT!
 - The Anatomy of a Contact Record
- Working Your Contacts
 - Creating/Editing Contacts
 - Finding Contacts – Lookups and Queries
 - Using the Power of List Views
- Working with Your Schedule
 - Tracking Follow Ups
 - Using the Calendar
 - Using the Task List
 - Managing Your Day - Putting it all together
- Organizing Your Contacts
 - Creating and Managing Groups
 - Creating and Managing Companies
 - Advanced Data Mining
- Communicating with Prospects and Clients
 - Managing Email
 - Writing Letters
 - Mail Merges – Written & Email
- Opportunities & Pipeline
 - Creating & Tracking Sales Opportunities
 - Using Opportunity List View
 - Pipeline Reports



- Tracking Results - Reports
- Preferences & Maintenance
 - Training ACT! to Work the Way You Do
 - Database Backups & Maintenance
- Wrap Up
 - Top 3 Tasks for Getting Started
 - Summary of Tools and References

Contact

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

Class Fee

- \$399.00 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 another scheduled AspenTech class.