



Cleary
Training
Associates



Customised IT Training & Development

Course Outline | Sage Contact Manager (ACT!) Level 1

Duration: 1 Day

Objectives: This course is designed to introduce new users to Sage Contact Manager. Users will learn the fundamentals of contact management using Sage Contact Manager.

Prerequisites: A basic understanding of using PC's, a keyboard and a mouse, plus knowledge of Microsoft Windows is required, gained either by previous experience or by attendance on a "Microsoft Windows User Introduction" course.

Overview of Sage Contact Manager

- Starting Sage Contact Manager
- Observing a Contact Database

Creating a Contact Database

- Creating a Contact Database
- Editing a Contact Database
- Printing an Address Book

Locating Contacts

- Finding Contacts
- Viewing Contacts
- Sorting Contacts

Organising Contacts

- Categorising Contacts
- Grouping Contacts
- Managing Contact Groups

Scheduling Activities

- Scheduling Activities for Contacts
- Managing Activities
- Scheduling Recurring Activities
- Creating Sales Opportunities

Working with Activities in other Windows

- Working in the Calendar View
- Working in the Task List View
- Using SideACT! to manage notes

Creating Documents with the Word Processor

- Creating a Letter
- Formatting Documents
- Viewing Other Templates