



Cleary  
Training  
Associates



Customised IT Training & Development

## Course Outline | Sage Contact Manager (ACT!) Level 2

**Duration:** 1 Day

**Objectives:** This course is designed for existing users of Sage Contact Manager. Users will learn advanced features of contact management using Sage Contact Manager.

**Prerequisites:** This course is aimed at existing users of Sage Contact Manager who have attended the Sage Contact Manager Level 1 course or who have a basic knowledge of Contact Management.

### Creating and Using Queries

- Creating Queries
- Creating Advanced Queries
- Adding Queries to the Lookup Menu

### Creating Macros

- Creating a Macro
- Adding Macros to the Toolbar

### Importing, Exporting and Synchronizing Data

- Importing Data
- Exporting Data
- Exchanging Data using Hand Held's
- Synchronizing Data

### Customising Sage Contact Manager

- Specifying Start-up Settings
- Modifying Fields in a Database
- Modifying Layouts
- Modifying Menus and Keyboard Shortcuts

### Working with Templates and Mail Merge

- Creating a Mail Merge Template
- Generating Form Letters
- Adding Templates to the Write Menu

### Customising Report Templates

- Modifying Report Templates
- Using Custom Report Templates

### Administrating your Database

- Managing Data Security
- Performing System Maintenance