

Bridge Concepts, Inc.
ACT! 2008/2009 Power User Training
ACT! Certified Consultants ♦ ACT! Premier Trainers
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I. What is Contact Management software?

Turn your contacts into relationships, and your relationships into results

II. Starting ACT!

III. The My Record

IV. Screen elements

V. Creating, duplicating, and deleting contacts

a. Notes

b. History

c. Attach files

VI. Basic/Advanced Lookups

VII. Mass Updating Fields

VIII. Contact List View

IX. Groups

X. Company Records

XI. LUNCH BREAK!!

XII. Document Templates

XIII. Activities

XIV. Record History

XV. Activity Series

XVI. Sales Opportunities

XVII. Email

XVIII. Support