

Sage Contact Manger (ACT!) Foundation - 1 Day

About the course

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

Who Should Attend?: A basic understanding of using PCs, a keyboard and a mouse, plus knowledge of Microsoft Windows.

In this course the following areas will be covered:

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

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

Organising Contacts

- Categorising Contacts
- Grouping Contacts
- Managing Contact Groups



For information and support

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