

ACT! 2008

Advanced User Training

Table of Contents

MANGING OPPORTUNITIES.....	3
CREATE A NEW OPPORTUNITY	3
OPPORTUNITIES TAB	5
OPPORTUNITIES LIST.....	6
EXPORT TO EXCEL	6
UPDATING OPPORTUNITIES.....	7
CLOSING OPPORTUNITIES.....	7
OPPORTUNITY PIPELINE AND OPPORTUNITY GRAPH.....	7
CUSTOMIZING OPPORTUNITIES	10
MANAGING OPPORTUNITIES EXERCISES	12
CREATE AND RUN ADVANCED QUERIES.....	14
CREATING ADVANCED QUERIES	14
SAVING AN ADVANCED QUERY	15
CREATE AND RUN QUERIES EXERCISES	16
GROUPS AND SUBGROUPS.....	17
GROUPS VIEW	17
CREATING GROUPS AND GROUP MEMBERSHIP	18
SUBGROUPS	19
GROUP LIST.....	20
GROUPS/COMPANIES TAB	20
CREATE AND WORK WITH GROUPS EXERCISES.....	22
COMPANIES AND DIVISIONS.....	24
COMPANIES VIEW.....	24
CREATING COMPANIES AND COMPANY MEMBERSHIP	25
DIVISIONS.....	27
COMPANY LIST.....	28
GROUPS/COMPANIES TAB	28
CONVERT A GROUP TO A COMPANY	29
CREATE AND WORK WITH COMPANIES EXERCISES	31
CREATING AND SCHEDULING ACTIVITY SERIES	32
CREATE AN ACTIVITY SERIES.....	32
SCHEDULE AN ACTIVITY SERIES.....	34
DELETE AN ACTIVITY SERIES	35
ACTIVITY SERIES EXERCISES	36

CREATE OR MODIFY A DOCUMENT TEMPLATE38
 CREATE A NEW LETTER/E-MAIL TEMPLATE38
 MODIFY AN EXISTING TEMPLATE42
 CONVERT A DOCUMENT TO AN ACT! TEMPLATE42
 CUSTOMIZE DOCUMENT TEMPLATES EXERCISE43

CREATE OR MODIFY A REPORT TEMPLATE44
 TYPES OF REPORTS44
 REPORT SECTIONS46
 SUBREPORTS.....50
 CUSTOMIZE REPORTS EXERCISES.....51

MODIFY MENUS54
 MODIFY MENUS EXERCISE.....56