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Sage ACT! Training

PREACT CRM® — exceeding customer expectations

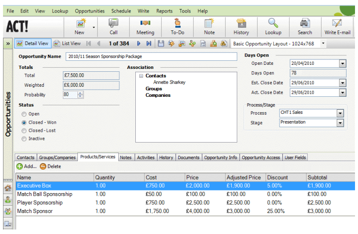
At Preact we've been helping users maximise the value of their ACT! software since 1993.

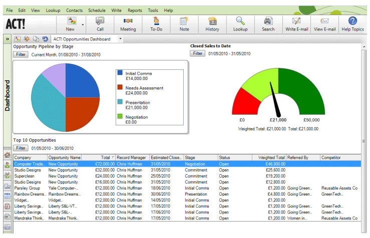
Our experience has shown that all businesses use ACT! in different ways so our training is always bespoke in line with your unique requirements and can be adapted to focus on specialist areas including Swiftpage email marketing.

We deliver our ACT training on-site using your data so it's always relevant to the way you work.

Our trainers possess a huge depth of ACT! knowledge and CRM expertise and will show you how to quickly get the maximum benefit from the software for your business and job function. Even before our training starts we'll contact you several days in advance to plan and agree a training structure which means we'll hit the ground running when we arrive on-site.

ACT! training from Preact doesn't finish when our consultant leaves your site. As you begin to apply your new skills and techniques we offer the back-up of 45 days post training ACT! support to answer any questions or ACT! issues that you may encounter.





'Excellent training! Very friendly & people focused! Very precise and organised in her approach! Helped us understand ACT! really well and really quickly thanks to her structured and creative training!'

Tevo Limited

Why Choose Preact

We're the UK's leading ACT! partner
As the multiple award-winning Sage ACT! Business Partner you have the reassurance of working with a trusted organisation that's committed to service excellence.

Bespoke training
ACT! tuition that's fully adapted to your training objectives.

Training on all recent ACT! versions
We provide training on all editions from ACT! v6 and higher.

Experienced ACT! trainers
Our consultants draw on a vast depth of ACT! and business consultancy expertise so they'll help you focus on what works and avoid common pitfalls.

Pre-training consultancy
The consultant who attends your site will phone in advance to agree the course format so you don't lose out on valuable training time on the day.

ACT! Certified Consultant

Sage Circle of Excellence Winner 2011

On-site training
To make sure new ACT! skills don't get left behind in a training room we only train on-site using your own data so it's fully relevant and easier for you to apply the learning points in your own working environment.

Practical worked examples
Tutor led examples will help you quickly master learning points and build greater confidence with ACT!

No public courses
Instead of a 'one size fits all' approach we only deliver personalised training to one business at a time.

Post training support
45 days of post ACT! training support is available to answer subsequent questions and support continued learning. An accompanying course manual is also provided.

Call us on 0800 381 1000 to discuss your ACT! training requirements

Sage ACT!
Training

ACT! INTRODUCTION TRAINING

Duration - 1 day course
Summary - Provides a solid foundation in the principles of using ACT! and focusing on the core features and functionality for end users

- **Introducing ACT!**
  The essential ACT! screen elements, the welcome screen, best practice for navigating ACT!, using the toolbars, menus, icon bar & tabs.
- **Contact Record Basics**
  Structure of ACT! contact records, data entry rules, using notes & history tabs, avoiding duplicated records, controlling access to contact records, creating, editing & deleting records. Saving ACT! contacts as vCards.
- **Finding ACT! Contacts & Data**
  Using the look-up menu, look-up options, keyword searches, previous look-up & creating basic a contact query. Customising contact list views, tagging contacts, searching for secondary contacts & checking contact activity,
- **Document Attachments**
  Attaching documents to ACT!, attaching document short-cuts, opening, editing & removing files, using the document preview pane.
- **ACT! Reports**
  Introducing ACT! reports & working with standard ACT! reports.
- **Opportunity Management**
  Creating ACT! opportunities, editing, closing & filtering opportunities, creating sales reports & working with opportunity dashboards
- **Activity & Calendar Management**
  Scheduling activities, viewing activities in the task list & ACT! calendars, customising calendar views, using the availability tab including invitations and resources management, introducing ACT! Smart Tasks, scheduling activities with multiple contacts, sending activity notifications in iCalendar format & integrating ACT! activities with Outlook.
- **Using ACT! with e-mails**
  Using ACT! to send and receive e-mails, attaching e-mails to contacts, creating new contact records from an incoming e-mail, creating an activity from an e-mail and basic e-mail merges.
- **Writing Documents & Mail Merges**
  Using ACT! to write letters to contacts, creating document templates, sending mail merges & using the ACT! menu in Microsoft Word.
- **Groups & Companies**
  Creating and populating a Group or Company, switching between group & company views, creating collective notes, histories, activities & opportunities.

'Your ACT! consultant worked hard to assess user needs and answer questions. Always attentive, knowledgeable and approachable. Very impressive.'

Cranfield University

'Thank you for two very productive ACT! training days. It was satisfying to see a consultant so well prepared and ready to deliver what were after.'

Balreed Digital

IMPORTANT: Some of the training topics & functionality listed in this guide are only available with earlier versions of ACT! and may only be applicable for the Premium edition &/or the latest version of ACT!

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BESPOKE ACT! USER TRAINING

Understand the ACT! basics but want achieve more with the software?
A lot of ACT! users contact us because they only use a very small part of the software and want to understand how they can fully benefit from ACT!'s more advanced features. This type of training is often role based and very popular with marketing & sales teams.

Customised ACT! User Training

We'll help you to create a customised course for a training session that perfectly targets your specific training needs. In a Preact bespoke training session you can structure ACT! content from topics as diverse as:

For Marketing Users

- **Profiling ACT! contacts -** Capturing extra information in ACT! to optimise marketing, ACT! field options & field rules, adding and amending ACT! fields.
- **Data lists -** Recommended list formats, preparing your lists before importing into ACT! & how to import data lists & contacts into ACT!
- **Building Contact Lists -** Running advanced look-ups and complex ACT! queries. Benefits of targeting specific contact groups vs. generic mailing lists, creating ACT! groups & sub-groups, adding & removing contacts from groups, using dynamics groups & applying membership rules.
- **Managing Mailing Lists -** Checking for duplicates & de-duplicating data. Data cleansing checks & best practice.
- **Email Marketing with ACT! -** Creating email templates, editing and formatting email templates, best practice for adding images & PDF files to ACT! email templates. Deciding your email subject title, timing your message, testing & sending your email merge. Managing opt-out requests & email bounce-backs.
- **Introducing ACT! E-Marketing (Swiftpage) -** Advanced email marketing functionality including using HTML email templates & e-marketing reporting.
- **ACT! Smart Tasks** - automating marketing campaigns using ACT! Smart Tasks.
- **Mail Merging from ACT! -** Create & edit document templates, editing and formatting templates for ACT! mail merges, converting standard MS Word documents to ACT! mail merge templates. Mail merge best practice including testing, batching and dealing with long documents, using the ACT! mail merge wizard & attaching a record history to all matching ACT! contacts. Making templates printer friendly , printing labels & envelopes.
- **Marketing Reporting -** Tracking the marketing referral source on each new sales opportunity, using ACT! reports to measure marketing results.
- **Staying in touch -** Assigning new sales opportunities to ACT! users, scheduling follow up activities to stay on top of leads and enquiries, creating custom marketing activities to track leads & group scheduling.

For Sales Users

- **Customising the ACT! Opportunity Module -** Creating multiple sales processes, building ACT! product lists, creating & editing sales document templates, customising the ACT! opportunity layout & adding new opportunity fields.
- **Working with Sales Opportunities -** Tracking activities & histories with opportunities & contacts, attaching documents to sales opportunities.
- **Sales Opportunity Management & Reporting -** Working with Opportunity Lists, running standard ACT! sales reports, adapting sales reports, using the ACT! sales graph & pipeline chart & working with ACT! sales dashboards & editing dashboard components & applying filters.

For All ACT! Users

- **Working with Multiple Contacts** - Creating notes and histories for multiple contacts, attaching files to multiple contacts & applying global changes to a selection of contacts.
- **Advanced Activity Scheduling** - scheduling for one & more ACT! users, granting calendar access, customising different types of activity, creating and amending an activity series, defining priority levels, booking resources, using Smart Tasks to automate processes, scheduling global events and integrating ACT! and Outlook calendars.
- **Web Links Tab** - launching, editing & adding links, using links to gather more contact information & interact with customers from ACT!
- **ACT! Reports** - running and filtering ACT! reports, using Company & Group reports, saving ACT! reports, setting favourites & output options.
- **Company & Group Records** - managing company & group records, creating division & sub-group records, using static and dynamic membership rules, applying changes to contact members.

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SWIFTPAGE EMAIL MARKETING TRAINING

Swiftpage

Our email marketing course is designed for existing and prospective Swiftpage users. This one day session focuses on how you can use Swiftpage email marketing and its integration with ACT! to plan, send and analysis e-marketing campaigns.

Introduction
- The basics of using Swiftpage
- Email law and spamming
- Integration with ACT
- Logging on to your online SwiftPage account

Template Library
- Working with the standard Swiftpage templates
- Customising Swiftpage templates
- Personalising templates with salutation and other ACT field data
- Uploading images
- Publishing templates
- Importing HTML templates created in external applications including Dreamweaver & FrontPage

Swiftpage content editor
- Editing email template text including linking to surveys
- Image options including sizing and positioning
- Uploading & linking to PDF documents

Customizing email Templates
- Set Column Widths
- Formatting email template windows

Surveys
- Creating a New Survey
- Adding & amending Survey Questions
- Linking Surveys to Image or Text
- Testing Surveys
- Survey Responses

Importing your ACT! contact list
- Setting up your ACT! contact group
- Uploading your contact list to Swiftpage

Sending Swiftpage emails
- Changing sender name &/or email address
- Scheduling emails

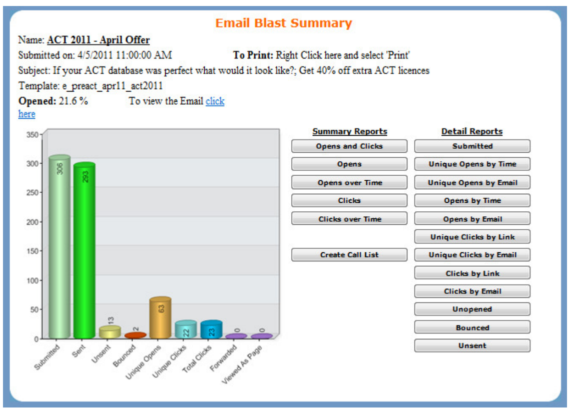
Email Campaign Reports
- Access your campaign reports
- Open & Click Summary Reports
- Campaign detail reports
- Account reports

Managing the Swiftpage User Profile
- General Profile
- Logo Settings Passwords
- Managing other Swiftpage users
- Distribution List

Call Lists
- Call list dashboard
- Creating Swiftpage Call Lists
- Assigning lists
- The ACT! e-marketing results tab

Swiftpage Drip Marketing
- Introducing Drip Marketing
- Understanding which version to purchase
- Using Drip Marketing with ACT smart tasks
- Building a drip marketing campaign
- Drip Marketing Types & Stages
- Applying Drip Filters

E-marketing Tips
- Tips for email marketing
- Text or HTML
- Calls to Action
- Testing emails including appearance and different email applications & measuring subject titles
- Managing opt-outs



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SYSTEMS ADMINISTRATOR TRAINING

Duration - 1 day course
Summary - Provides the skills and best practice tuition enabling administrators to manage, maintain and customise their ACT! database
Typically delivered to - ACT! database administrators who have undertaken end-user training or are experienced ACT! users

- **Creating an ACT! Database**
  How to create a new ACT! database, setting up new ACT! users, deleting & re-assigning ACT! users, understanding ACT! security roles, currency preferences, managing ACT! teams & defining preferences.
- **Protecting ACT! data**
  Finding & removing duplicate records, backing up an ACT! database, restoring ACT! data, locking / unlocking a database, clearing old contact data & best practice for database performance and data integrity.
- **Importing / Exporting Data**
  Using the ACT! import wizard, importing data from other applications, creating a data import map, exporting ACT! data to other applications and exporting a contact list.
- **Database Customisation**
  ACT! field options including tick boxes, image fields & drop-down lists. Defining fields & customising ACT! layouts. Customising ACT! menus and toolbars.
- **Admin Dashboards**
  Configuring ACT! administration dashboards.
- **ACT! Network Configuration**
  Understanding how ACT! works on a network, integrating ACT! with other applications including Microsoft Outlook & Microsoft Word & locating program files and folders.
- **Sharing ACT! data with remote users**
  Introducing ACT! database synchronisation, synchronisation options and performing database sync.
- **ACT! Report Templates**
  ACT! report customisation & an overview of advanced reporting capability using VB scripting.

‘I found your trainer to be a great teacher. She immediately made me feel at ease to ask questions and learn quickly. I would highly recommend Preact to anyone.’

Schwank Ltd

‘Our training was a great success. We found Clare really easy to work with & her knowledge of ACT! is superb. I’d happily recommend her & Preact to anyone.’

MJC Group

‘Clare has just left us after the administrator training on our ACT database. Really excellent, thanks for two very productive days!’

British Nutrition Foundation

‘We had a great training session. Sue answered all questions we threw at her - & there were quite a lot! We all agreed that the session was well worth the money!’

Chartridge Conference Company

‘Really good training session on both days – Sue’s explanation and direction has been brilliant and very easy to follow!’

DSA Design

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