

POWER TIME CORPORATION

ACT! Training

Power Time Training Philosophy

Our goal in every Power Time training class is that our students will find it the most useful training they have ever taken. Every class should make your job easier and make you more money. You'll never sit through lectures at Power Time. All instruction is geared to your company, your job, and the way you do business.

Power Time ... Mastering time through the power of technology

In the intensity of today's competition, relationships are the key to success. But building relationships takes time. At Power Time, we focus on making machines do the tedious, repetitive work they do best so you have more time to do the things only people can do – develop relationships with other people. We teach you how to have more perfect customers – profitable, repetitive, loyal, and pleasant.

Available ACT! Classes

Power Time offers ACT! Quickstart, Advanced ACT! User, ACT! Administrator classes and hourly specialized training.

ACT! Classes are scheduled for your company. Quickstart is 3 hours. Other classes are 6-hours, divided into 2 half-day sessions. Classes may be held at your site or in Power Time's Training Center, located at 4141 Directors Row, just north of the Galleria at the intersection of the 610 curve and 290. Tuition is \$149 for Quickstart and \$249 for other classes (per student per class), and there is a three-student minimum. Classes are scheduled upon Power Time's receipt of your tuition.

ACT! QUICKSTART **Customer Relationships – The Key to Setting Yourself Apart**

The Basics

ACT! Screens and Tabs

What's in a record

Finding Contacts

Starting Your Day

Checking what's scheduled

Making your morning calls

Taking notes

Sending emails

Sending letters

Attaching documents to contacts

Scheduling callbacks, todo's, and meetings

After Your Lunch Networking Meeting

Adding new contacts

Quick followup

Tracking Opportunities

Using Lookups to sell

Reporting your results

Time to Hit the Road

Printing your schedule

Planning tomorrow



Power Time Corporation

4141 Directors Row, Suite A • Houston, TX 77092 • Tel 713 995-8455 • Fax 713 995-8405 • www.powertime.com

Microsoft CRM, ACT!, and TeleMagic

Consulting, Customizing, Training, and Addons

POWER TIME CORPORATION

ACT! Training

ADVANCED USER TRAINING

Attracting and Retaining Perfect Clients

A Quick Review of the Basics

Scheduling Tips and Tricks

Managing your Calendar

Scheduling Multiple Contacts

Scheduling Recurring Activities

Scheduling Resources

Using Activity Series

Advanced Correspondence

Creating Templates

Sending Mass Mailings

Emailing

Creating Email Templates

Integrating Outlook and ACT!

Sending Mass Emails

Linking email back to ACT!

Document Management

Attaching a document

Viewing attached documents

File attachments

Advanced Lookups

Company Lookups

Group Lookups

Opportunity Lookups

Queries

What? When? Why?

When to use Lookups, Queries, Groups, and Companies

How to Create a Query

Advanced Queries

Working with Groups

Using Groups Creatively

Creating Groups

Adding Members

Using Queries in Group Rules

Group Activities and Notes

The Company Level

Why separate companies

Linking Contacts to Companies

Associating Contacts with Companies

Divisions and Subdivisions

Managing Opportunities

What is an opportunity?

The Opportunity Process

Creating, editing, and closing Quoting

Product Lists

Reporting your Results

Modifying Report Templates

Designing New Reports

Other options



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ACT! ADMINISTRATOR TRAINING

This course is geared to ACT! administrators who may or may not use the program. This class does not instruct the administrator in how to use ACT! Further, this class is generally customized to the specific needs of your company. Based on your use of ACT!, certain topics will receive more or less attention.

PIMs, Customer Management, CRM
What ACT! is and is not

Setup and Maintenance

System requirements
Licensing
Installation Issues
Preferences
Security
Creation and set up of users
Deleting users – do's & don'ts
Creating / deleting databases
Data cleanup
Mass Changes
Database Backup
Troubleshooting Tips

Database Design

Field definition
Attributes

Primary Fields
Generating History
Drop Downs
Triggers
Dup Checking
History Editing
Indexing

Layouts

Creating and modifying layouts
Fields, tab order, format
Custom tabs

Data preparation
Data import

Remote User Management

Options for remote users
ACT! and Terminal Services
ACT! for Web
Synchronization

Discussion of SDK and Addons

In addition to the three standard classes, Power Time will design classes around your company's requirements, combining information from the various classes, omitting unnecessary information, or abbreviating classes for experienced users. Individual hourly training is also available to focus on specific needs.

Call Susan at 713.995.8455 to reserve or customize your class!



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