

learning
equals
development

EQV Course Outline



- Introduction to Act! 2009
- 1 Day

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Introduction to Act! 2009

(1 Day)

Business Benefit

ACT! 2009 contact management software helps individuals and teams build business relationships and get results.

Who Should Attend?

- Provides a solid foundation on the key principles of using ACT! 2009 for new and inexperienced users.

Learning Objectives

By the end of this course you will be able to...

- **Contact Record Basics**
- **Locating Contacts**
- **Document Management**
- **Reports**
- **Opportunity Management**
- **Activity and Calendar Management**
- **Sending emails and Outlook integration with ACT!**
- **Writing Correspondence and Mail Merges**

You may also be interested in

Microsoft Word Introduction
Microsoft Excel Introduction

Course Content

- Structure of a Contact Record
- Data Entry Rules
- Notes and History Tabs
- Creating, Editing and Deleting Records
- The Lookup Menu
- Customising Contact List View
- Keyword Searches
- Document attachments
- Introducing ACT! Reports
- Working with standard ACT! Reports
- Calendars
- Invitations and Resources Management
- Microsoft Outlook and ACT!
- Creating a contact records from incoming e-mail
- Using ACT! to write letters,
- Mail merging to contacts,
- Printing labels and envelopes

Dates: **Dates to suit you...**
Please contact EQV

Price: **£POA**
per person

The EQV Promise

We ensure that our courses are well received and are delivered by trainers that have actual commercial competency in their chosen subject.

Not only is this essential for our accreditation purposes but it ensures that the trainers will be able to include relevant experiences they themselves have learnt from. This generates appropriate engagement and empathy in the training environment.

When the course is completed we will report back to you about how the training has been received and can indeed evaluate the training right from start to finish after the skills transfer period. This information can come from your account manager who is your main point of contact at all times.

Our Training Centre

Set in the heart of beautiful rolling Leicestershire countryside, our idyllic training facilities not only provide attendees with the perfect environment to concentrate on their individual learning experience but also provide the practicality of ample parking and fully designed and equipped training rooms.

You will be greeted upon arrival by our training coordinator who is your point of contact throughout the day should have any specific queries.

A delicious buffet lunch is provided catering for a variety of dietary needs.

The EQV Experience

Our training courses take the attendee on a journey of learning and development. Throughout the course everyone is engaged in a stimulating and participative way.

Our courses are designed to encompass many different kind of learning activities making sure they appeal to different natural styles of learning that individuals have.

Activities may include a selection of syndicate work, discussion, pair work, case studies, games, role play, quizzes and presentations.

During the event an individual works on their own implementation plan so that they have a clear plan of how they are going to support their own skills transfer back in the workplace. Whilst it is important for the attendees to enjoy the workshop we want to ensure they apply as much as possible back in the workplace.

