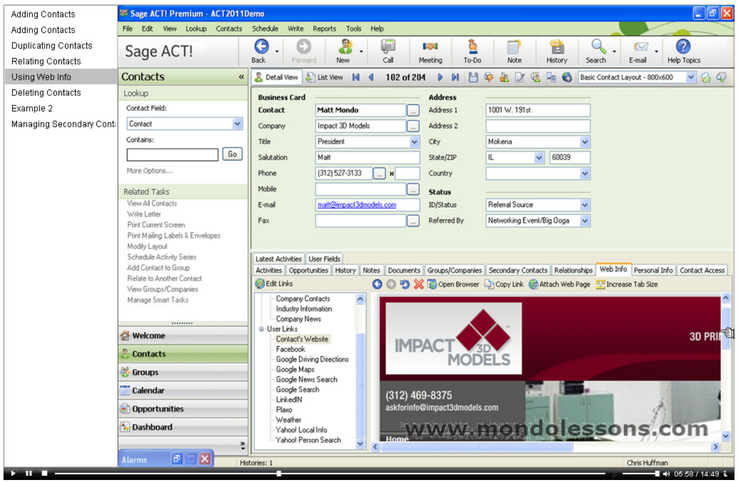
ACT! Training Videos by Mondo Media

www.mondolessons.com

MondoLessons for ACT! 2011 Training Videos

Watch. Learn. Sell.



Learn how to use ACT! by watching videos created by Certifed Consultant with 21 years of ACT! experience. Review the lessons as often as you want, and learn how Sage ACT! makes it easy to manage contacts and relationships to close more business.

Contents:
Total Number of Chapters:15
Total Time: 4 Hours, 19 Minutes

How it Works

MondoLessons

We use screen recording technology that allows us to play back the lessons like a VCR, and we add narration and pop-up graphics to make it easy to follow the lessons.

Benefits

- Watch the lessons as often as necessary from your desktop.
- Learn ACT! without reading a user's guide.
- Control your training costs.

What our Clients Say

You are amazing. Your lessons get a five-star rating, you're an expert at this.

Just started viewing the lessons, you spoiled me already. The site map, support page, lessons are easy to view and understand yet powerful. I can see you've taken great pains with this. When I email you with questions, your response time has been extremely prompt and your answers easy to understand. I will be back for additional lessons with other products.

Thank You,
Helga Leah (Curry) Tomaino

About Mondo Media—312-527-3133-mark@mondocrm.com

After twenty years of using ACT! and owning a consulting practice since 1997, we decided to make a library of videos to help clients learn at their own pace and make an affordable training option.

The founder, Mark R. Mondo, has been an ACT! Certified Consultant since 1998 and an ACT! Premier Trainer since 2005. Mark currently runs MondoCRM a CRM consulting practice in Chicago, co-founded The CRM Alliance in 2004 and created the first online training video service in 2003.

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ACT! 2011/13.0 Contents - 15 Chapters - 5 Hours 19 Minutes

ACT! Overview
- Identifying Key Elements of the ACT! Interface
- Launching ACT!'s Views
- Setting View Bar Options
- Launching Contact View Tabs
- Managing My Record

Managing Contacts
- Add, Duplicate and Delete Contacts
- Connecting contacts with relationships
- Managing contact level security
- Add, Modify and Promote Secondary Contacts

Managing History
- Add, Modify and Distniguish History v. Notes

Managing Attachments
- Add, Modify and Delete Attachments

Looking Up Contacts
- Lookup All Contacts
- Lookup Basic Fields
- Lookup Other Fields
- Lookup Keywords
- Lookup Empty Fields
- Lookup Non-Empty Fields
- Lookup by Annual Event
- Lookup - Add to and Narrow Lookup

Manipulating List Views
- Launch View
- Looking for contacts
- Sorting contacts
- Adding Columns
- Removing Columns
- Move Columns
- Tag Mode:Switch to Tag Mode and Build Lookup
- Tag Mode:Lookup Selected & Omit Selected Contacts
- Setting Grid Lines
- Export to Excel

Scheduling Activities
- Record History
- Setting Preferences
- Schedule an Activity
- Edit Existing Activity
- Reschedule an Activity
- Complete Activity
- Display Day, Weekly and Monthly Calendar
- From Calendar: Schedule an Activity
- From Calendar: Edit Existing Activity
- From Calendar: Reschedule an Activity
- From Calendar: Complete Activity
- From Calendar: Erasing Activity
- From Calendar: Filter Calendar
- From Calendar: Print Calendar
- Filter and Sort Task List
- Sort Task List
- From Task List: Reschedule an Activity
- From Task List: Complete Activity
- From Task List: Schedule an Activity
- Changing Task List Columns
- Printing Task List
- Custom Activity Types

Using Groups
- Overview
- Creating and Deleting Groups & Subgroups
- Moving Groups and SubGroups
- Changing Group Membership
- Adding Static and Dynamic Contacts to a Group
- Adding the current lookup to a Group
- Using Opportunities to define groups
- Removing Contacts from a Group
- Looking Up Contacts in a Group
- Looking Up Group Members from the Contact View
- Viewing Group Members in the Groups View
- Changing Group Membership in the Contact View
- Group "Roll-up" See all the notes/history for the members
- Running Group membership reports and using Group List views

Companies
- Creating & Deleting Company & Division Records
- Changing Company Membership
- Adding Linked Contacts to a Company
- Looking Up Contacts in a Company
- Looking Up Company Members from the Contact View
- Viewing Company Members in the Groups View
- Company "Roll-up" See all the notes/history for the members

Execute Mail-Merge
- Setting up Word
- Showing Generic Letter/Fax Cover/Memo
- Modifying Templates
- Converting Templates from Word
- Sending to One or Many Contacts
- Running Labels

Viewing & Composing Email
- Setup Outlook with Preferences
- Attach Incoming Messages
- E-Mail Merge (Broadcast E-Mail)
- Send to One or Many Contacts
- Create New Contacts from Incoming E-Mail

Managing Opportunities (Sales Forecast)
- Define Processes and Products
- Add, Modify and Close Opportunity
- Using the Opportunity List
- Export to Excel
- Working from Opportunity List

Administrating a Database
- Customize Contact field drop-downs
- Customize Opportunitiy Fields
- Customize Preferences
- Database Backup/Restoration
- Using ACT! Scheduler

Sharing ACT! & Outlook Calendar
- Sending ACT! Calendar to Outlook
- Sending ACT! Contacts to Outlook

Running Reports
- Running Contact, company, history and Group and Opportunity Reports
- Export to Excel vs. Contact Reports

Using Dashboards
- Using Default dashboards
- Customizing the filters
- Creating new dashboards and saving customized versions

Creating Smart Tasks
- Using Default dashboards
- Customizing the filters
- Creating new dashboards and saving customized versions

Using ACT! for Web
- Reviewing the Workspace
- Managing Contacts
- Looking up Contacts
- Entering history, Notes and Attachments
- Using Calendar
- Writing a Letter
- Writing an Email
- Running Reports
- Running a Dashboard
- Setting Preferences