

# Advanced ACT! Training

## Location

Training Courses can either take place in our offices, or at a location of your choice.

## Format

Advanced training courses typically last a full day, with a “learning by doing” approach.

The trainer starts with a demonstration of the software features that are going to be learnt so that trainees gain an understanding of the end result they are aiming for and the steps necessary to get there. After the demonstration, the training is “hands-on” to provide trainees with progressive practice in using functions of the software.

## Content

### Advanced Searches

- Create Keyword Search Lookups
- Contact Activity Lookups
- Lookups by Example
- Create Advanced Queries

### Advanced Scheduling

- Setting up Activity Series

### Letters and Mail Merges

- Write Letters and Emails
- Edit existing Templates
- Create new Templates
- Perform Mail Merges (by letter and email)

### Exporting Data

- Map Fields to Excel

### Opportunities

- Set up Opportunity Processes
- Set up Product Lists
- View and Update existing Opportunities
- Create new Opportunities
- Close Opportunities
- Report on Opportunities

### Reports

- Run Existing Reports
- Edit Existing Reports
- Edit Existing Dashboards
- Create New Dashboards

## Prices

### Training

- £750 per course\* (plus expenses if training is not conducted in our offices)

### Expenses

Travel expenses dependant upon location: petrol @ 40p/mile OR train and taxi fare  
Accommodation expenses for multi-day, distance training

Expenses will be agreed in advance of the course and be submitted with copies of receipts.  
\*Special rates can be agreed for multi-day training.

## Booking

To book an Advanced ACT! training course, please contact:

Vivienne Watts at Hilltops IT on +44 (0)844 357 7360 or email [sales@hilltopsit.co.uk](mailto:sales@hilltopsit.co.uk) to confirm dates and receive your booking reference. Please then complete, sign and return the Training Booking Form at the end of this document.

## Notes

- In order to reduce “background noise” and promote learning, it is strongly recommended that a separate room is used for the training course(s).
- We recommend that a maximum of four people attend each training course to maximise the benefit each individual will get from the session.
- If requested early enough in advance, the trainer may be able to bring some laptops if sufficient PCs can not be made available in the training room.
- Training courses can be tailored to meet your specific requirements – please contact us to discuss content, duration and cost.

## Terms and Conditions

- The training course price and expense charges included in this document are valid until 31st July 2009 and are subject to VAT at current rates.
- One full day is the minimum training course booking
- A cancellation fee of 50% of the value of the course(s) booked will be charged if a cancellation is made within 2 weeks of the course dates.

# Training Booking Form

Your Company Name			
Booking Reference			
Your Company Address			
Contact Name			
Contact Phone Number			
Contact Fax Number			
Contact Email Address			
Training Location (if different to above)			
ACT! Version			e.g. Sage 50 ACT! 2009 v11 Premium
Course Name(s)			
Course Date(s)			
Course Fee(s)	£750 per day plus VAT and any travel or accommodation expenses incurred		

Please list the attendees and tick which training course(s) they will be attending.

Trainee Name(s)	Department	Introductory	Advanced	Administrator

I hereby agree to the course Terms and Conditions:

Name	Position	Signature	Date

Return to: Vivienne Watts, Hilltops IT, Lymedale Business Centre, Lymedale Business Park, Newcastle-under-Lyme, Staffs, ST5 9QF