

## Navigating in the ACT! Contact, Group, and Company Views

View the Activities tab	ALT + F9
View the Company List	ALT + F10
View the Contact Detail view	F11
View the Contact List	F8
View the Daily Calendar	SHIFT + F5
View the Group List	F10
View the Groups/Companies tab	CTRL + F9
View the History tab	SHIFT + F9
View the Mini-calendar	F4
View the Monthly Calendar	F5
View the Notes tab	ALT + SHIFT + F9
View the Opportunity List	SHIFT + F7
View the Task List	F7
View the Weekly Calendar	F3
View the Work Week Calendar	SHIFT + F3

**Tip:** To close a menu or dialog box without saving any selections, press ESC.

## Getting Help, Support, and Training

### In ACT!

Feature Tours: From the **Help** menu, click **Feature Tours** > the tour name.

Help from a wizard or dialog box: From the wizard or dialog box, press F1.

Online Help: From the **Help** menu, click **Help Topics**.

User's Guide: From the **Help** menu, click **Online Manuals** > **ACT! User's Guide**.

### From your Internet Browser

ACT! User Community: Go to [www.act.com/community](http://www.act.com/community)

Knowledge Base: Go to <http://support.act.com>

Training: Go to [www.act.com/community/training/enduser](http://www.act.com/community/training/enduser)

### By Phone

Customer Service: Call 877-386-8083.

Technical Support: Call 800-992-4564.

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software




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# 2006 Quick Reference Card






## Building Your Database (for Contact, Group, and Company Views)

Add a contact, group, or company	  	INSERT
Add an opportunity		CTRL + F11
Attach a file		CTRL + I
Expand the drop-down list for the current field		F2
Insert a note		F9
Record history		CTRL + H

## Scheduling Activities & Tasks (for Contact, Group, and Company Views)

Clear an activity		CTRL + D
Display the Timer		SHIFT + F4
Reschedule an activity		CTRL + SHIFT + D
Schedule a call		CTRL + L
Schedule a meeting		CTRL + M
Schedule a to-do		CTRL + T

## Working with E-mail (for E-mail View and New Message Window)

Create a message		CTRL + N
Delete a message or folder		CTRL + D
Find a message		CTRL + SHIFT + F
Forward a message		CTRL + F
Reply to a message		CTRL + R
Send a message		CTRL + ENTER


**Note:** The online Help lists more keyboard shortcuts.

## Customizing List Views and Tabs

Change content and layout to make data display how you want it to.

<b>Add or remove columns</b>	<ol style="list-style-type: none"><li>1. On the list view or tab, click <b>Options</b>.</li><li>2. Select <b>Customize Columns</b>.</li><li>3. To add a field: in the <b>Available fields</b> list, select a field, and then click the right arrow. (Or, click the double right arrow to add all fields.)</li><li>4. To remove a field: in the <b>Show as columns in this order</b> list, select a field, and then click the left arrow. (Or, click the double left arrow to remove all fields.)</li><li>5. To change the column order: click <b>Move Up</b> or <b>Move Down</b>.</li><li>6. Click <b>OK</b>.</li></ol>
<b>Rearrange columns</b>	<ol style="list-style-type: none"><li>1. Display the list view or tab.</li><li>2. Click and hold on a column label, and then drag the column to a new position.</li></ol>
<b>Resize columns</b>	<ol style="list-style-type: none"><li>1. Display the list view or tab.</li><li>2. Hold the pointer over the edge of a column until the pointer changes to a double-headed arrow.</li><li>3. Drag the edge of the column to the right or left.</li></ol>
<b>Sort items in a list view</b>	<ol style="list-style-type: none"><li>1. Display the list view.</li><li>2. Click a column label to sort the list based on that column.</li><li>3. Click again to reverse the sort order.</li></ol>
<b>Sort items in a list view using multiple fields</b>	<ol style="list-style-type: none"><li>1. Display the list view.</li><li>2. From the <b>Edit</b> menu, click <b>Sort</b>.</li><li>3. In the <b>Sort</b> dialog box:<ul style="list-style-type: none"><li>• In the <b>Sort by</b> field, select a field, and then select <b>Ascending</b> or <b>Descending</b>.</li><li>• In the <b>and then by</b> field, select a field, and then select <b>Ascending</b> or <b>Descending</b>.</li><li>• In the <b>and finally by</b> field, select a field, and then select <b>Ascending</b> or <b>Descending</b>.</li></ul></li><li>4. Click <b>OK</b>.</li></ol>

## Working Effectively

<b>Check spelling</b>	In documents and e-mail messages, press ALT + F7.
<b>Create activity series</b>	<ol style="list-style-type: none"><li>1. From the <b>Schedule</b> menu, point to <b>Manage</b>, and then click <b>Activity Series Templates</b>.</li><li>2. In the <b>Activity Series Template Creation Wizard</b>, select <b>Create a new activity series</b>, and then click <b>Next</b>.</li><li>3. Follow the directions on the pages, pressing <b>Next</b> to advance. For field definitions, press F1.</li></ol>
<b>Customize the navigation bar</b>	<ol style="list-style-type: none"><li>1. From the <b>Tools</b> menu, point to <b>Customize</b>, and then click <b>Navbar</b>.</li><li>2. In the <b>Customize Standard Menu</b> dialog box, drag commands to and from the navigation bar.</li></ol> <p><b>Note:</b> Click <b>Reset</b> to restore the default settings.</p>
<b>Print calendars</b>	<ol style="list-style-type: none"><li>1. Display a calendar view.</li><li>2. On the toolbar, click <b>Print Calendar</b>. </li></ol>
<b>Refresh views</b>	Press CTRL+F5.
<b>Set activity alarm</b>	<ol style="list-style-type: none"><li>1. Open the activity.</li><li>2. In the <b>Schedule Activity</b> dialog box, in the <b>Ring Alarm</b> field, select how long before the activity you want the alarm to sound, and then click <b>OK</b>.</li></ol>
<b>Undo last action</b>	Press CTRL+Z.

## Using Tag Mode

Add data and schedule activities for several contacts at once.

<b>Add a note or history item to multiple contact records</b>	<ol style="list-style-type: none"><li>1. In the <b>Contact List</b>, select <b>Enable Tag Mode</b> (SHIFT+F8).</li><li>2. Select contacts you want to tag, and then:<ul style="list-style-type: none"><li>• To add a note, press F9.</li><li>• To add history, press CTRL+H.</li></ul></li></ol>
<b>Schedule a call, meeting, or to-do item with multiple contacts</b>	<ol style="list-style-type: none"><li>1. In the <b>Contact List</b>, select <b>Enable Tag Mode</b> (SHIFT+F8).</li><li>2. Select the contacts you want to tag, and then:<ul style="list-style-type: none"><li>• To schedule a call, press CTRL+L.</li><li>• To schedule a meeting, press CTRL+M.</li><li>• To schedule a to-do, press CTRL+T.</li></ul></li></ol>