

Displaying Information in ACT!

Activities tab	ALT + F9
Company List	ALT + F10
Contact Detail view	F11
Contact List	F8
Daily Calendar	SHIFT + F5
Dashboard	CTRL + F7
Group List	F10
Groups/Companies tab	CTRL + F9
History tab	SHIFT + F9
Mini-calendar	F4
Monthly Calendar	CTRL + F5
Notes tab	ALT + SHIFT + F9
Opportunity List	SHIFT + F7
Refresh	F5
Task List	F7
Weekly Calendar	F3
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 the **Help** menu, click **Help Topics**. 

Quick Start Guide: From the **Help** menu, click **Online Manuals** > **New User Quick Start Guide**.

Setup Assistant: From the **Help** menu, click **Setup Assistant**.

From Your Internet Browser

ACT! User Community: Go to <http://community.act.com>

Knowledgebase: Go to www.act.com/support/technicalsupport

Training: Go to www.act.com/support/training

By Phone

Customer Service and Support: Call 1-866-903-0006.

ACT! Quick Reference Card

for ACT! by Sage 2010 Solutions

Building Your Database (for Detail Views)

Add a contact, group, company, or opportunity  Press Insert

Attach a file  CTRL + I

Attach a shortcut to a file from the History tab  CTRL + I

Insert a note  F9

Record history  CTRL + H

Scheduling Activities & Tasks (for Detail Views)

Schedule a call  CTRL + L

Schedule a meeting  CTRL + M

Schedule a to-do  CTRL + T

Clear a selected activity  CTRL + D

Display the Timer  SHIFT + F4


Reschedule an activity  CTRL + SHIFT + D

Communicating with Contacts, Groups, and Companies

Write an e-mail message  ALT+I, then CTRL+E

Write a letter  ALT+I, then CTRL+L

Write a fax cover page  ALT+I, then CTRL+F

Write a new document (word processor)  ALT+I, then CTRL+N


Create e-mail marketing messages 

Print labels and envelopes  ALT + F, then CTRL + P


Note: Help lists keyboard shortcuts for all areas of the application.

Finding and Viewing Information

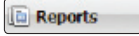
Find information using lookups

1. From the global toolbar, click .
2. From the **Field** list, select a field to search.
3. In the field, type the information to search for or select from the list.
4. Click **OK**.

Add or remove columns on List views

1. On a List view, click .
2. To add a column: In the **Available fields** list, select a field. Click the right arrow. (Click the double-right-arrow to add all fields.)
3. To remove a column: In the **Show as columns in this order list**, select a field. Click the left arrow. (Click the double-left-arrow to remove all fields.)
4. To change the column order: Click **Move Up** or **Move Down**.
5. Click **OK**.

Create a list of favorite reports

1. From the Navbar, click **Reports**. 
2. Select the **Favorites Reports** check box next to the report.

Filter activities on calendars and Task List

- Select options to show activities:
- For a specific date: From the **Dates** list, select a date option.
 - By activity type: From the **Types** list, select the check boxes for the activity types.
 - By priority: From the **Priorities** list, select the check boxes for the priorities.
 - For specific users: Click **Select Users**, select the users, and then click **OK**.
- Tip:** Click the **Options** button to display private, timeless, cleared, or Outlook activities.

Find contact and company information on the Web

1. From a Contact or Company Detail view, click the **Web Info** tab.
2. Select a site from the list on the left. The internal browser opens and displays a Web page for the selected site.

Working Effectively and Sharing Information


Copy a Dashboard to use in a presentation

Right-click on a Dashboard, select **Copy to Clipboard**.

Duplicate a record



Edit fields in Contact, Group, or Company List views

CTRL + E, click in a field. Click  or select text and type.

Expand the drop-down list for the current field

F2

Export list data to Excel®



Insert a note for multiple contacts (in the Contact List)

SHIFT + F8, select contacts, F9.

Print selected records

Select records, then from **File** menu, click **Quick Print Selected**.

Quick print the current window



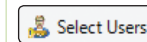
Record a history for multiple contacts (in the Contact List)

SHIFT + F8, select contacts, CTRL + H.

Schedule an activity with multiple contacts (in the Contact List)

SHIFT + F8, then:
CTRL + L (call)
CTRL + M (meeting)
CTRL + T (to-do)

Select other users to view their public data



Send a contact's vCard

1. Open a **Contact Detail** view.
or
From the **Contact List**, select multiple contacts.
2. From the **Contacts** menu, click **Send vCard**.

Turn on Tag Mode (in the Contact List)

SHIFT + F8

Update a contact with company information



View (access) a previous contact lookup

1. From the Navbar, click **Contacts**.
2. From the **Lookup** menu, select **Previous**.