| 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.


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# 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 | |
| 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 Lookup<br>2. From the **Field** list, select a field to search.<br>3. In the field, type the information to search for or select from the list.<br>4. Click **OK**. |
| **Add or remove columns on List views** | 1. On a List view, click<br>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.)<br>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.)<br>4. To change the column order: Click **Move Up** or **Move Down**.<br>5. Click **OK**. |
| **Create a list of favorite reports** | 1. From the Navbar, click **Reports**. Reports<br>2. Select the **Favorites Reports** check box next to the report. |
| **Filter activities on calendars and Task List** | Select options to show activities:<br>• For a specific date: From the **Dates** list, select a date option.<br>• By activity type: From the **Types** list, select the check boxes for the activity types.<br>• By priority: From the **Priorities** list, select the check boxes for the priorities.<br>• For specific users: Click **Select Users**, select the users, and then click **OK**.<br>**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.<br>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,<br>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,<br>CTRL + H. |
| **Schedule an activity with multiple contacts (in the Contact List)** | SHIFT + F8, then:<br>CTRL + L (call)<br>CTRL + M (meeting)<br>CTRL + T (to-do) |
| **Select other users to view their public data** | Select Users |
| **Send a contact's vCard** | 1. Open a **Contact Detail** view.<br>or<br>From the **Contact List**, select multiple contacts.<br>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**.<br>2. From the **Lookup** menu, select **Previous**. |