Quick reference card

For Act! Pro and Act! Premium v17

Displaying Information

Activities tab	ALT + F9	History tab	SHIFT + F9
Company List	ALT + F10	Mini-Calendar	F4
Contact Detail view	F11	Monthly Calendar	CTRL + F5
Contact List	F8	Notes tab	ALT + SHIFT + F9
Daily Calendar	CTRL + F4	Opportunity List	SHIFT + F7
Dashboard	CTRL + F7	Previous Layout	F6
Go Back	ALT + Left Arrow Key	Refresh	F5
Go Forward	ALT + Right Arrow Key	Task List	F7
Group List	F10	Weekly Calendar	F3
Groups/ Companies tab	CTRL + F9	Work Week Calendar	CTRL + F3

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

Getting Help

Featured Videos: On the Help menu, click Feature Tours.

Help: On the global toolbar, click Help Topics.

Quick Start Guide: On the Help menu, under Online Manuals, click Act! New User Quick Start Guide.

Access Service and Support, the Knowledgebase, and Links to Communities: On the Help menu, click Online Support > select an option.

© 2014 Swiftpage ACT! LLC. All Rights Reserved. Swiftpage, Act!, and the Swiftpage product and service names mentioned herein are registered trademarks or trademarks of Swiftpage ACT! LLC, or its affiliated entities.

Adding your information (for detail views)

Add a Contact, Group, Company, or Opportunity	Press Insert
Add a History	CTRL + H
Add a Note	CTRL + N
Attach a file	CTRL + I
Attach a shortcut to a file from the History tab	

Scheduling activities and tasks

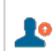
Schedule a Call	CTRL + L
Schedule a Meeting	CTRL + M
Schedule a To-Do	CTRL + T
Clear a selected Activity	CTRL + D
Reschedule an Activity	CTRL + SHIFT + D

Communicating with contacts, groups, and companies

Write an Email Message	ALT + I, then CTRL + E
Send an Emarketing Campaign	ALT + M, then CTRL + S
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
Print Labels and Envelopes	ALT + F, then CTRL + P

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

Searching and viewing information	
Search	1. In the Search text box, type your search term or terms. Click Go. 2. Select or clear Show Only and Last Edited filters to narrow your search. 3. To go to an item in the search results, click the hyperlink. 4. To create a lookup of the search results, click Create Lookup.
Use the Back and Forward buttons to navigate through views	• On the global toolbar, click the Back button to go back to previous views. • Click the Forward button to go forward in views. • Your current view is underlined and bold in the list. To see a list of your most recently accessed views: 1. Click the drop-down arrow on the Back button. 2. Select an item in the list to go to that view.
Create a list of favorite reports	1. On the Navbar, click Reports. 2. Select the Favorites Reports check box next to the report.
Filter histories by type in the History List	1. On the Navbar, click History List. 2. From the Types list, you can: • Click the plus sign to expand the category to view the associated types. • Clear the check box to clear a history type. Tip: Clearing the top-level category clears all types in that category. • Select None to clear all types and categories. • Select a check box to select individual types. • Select the top-level category to select all types in the category.
Find contact and company information on the web	1. On a Contact or Company Detail view, click the Web Info tab. 2. Select a site from the list on the left, and the web page for the selected site displays on the right.
Find solutions* to help your productivity	1. On the Navbar, click Marketplace. 2. Click a solution to learn more. *Requires Internet access.

Working effectively and sharing information	
Duplicate a Contact	
Expand the drop-down list	F2
Export list data to Excel®	
Insert a note for multiple contacts	SHIFT + F8, select contacts, F9.
Locate, open, and share a database	1. On the File menu, click Open/Share Database. 2. To open a listed database, select it, and click Open Database. 3. To share* a database, click Share. *Requires Act! Admin or Mgr role.
Open and use the Act! Scratchpad	1. Double-click the desktop shortcut, or on the Tools menu, click Act! Scratchpad. 2. Place your cursor in a line and begin typing. Click the tools to reorder, bold, italicize, and more. 3. Click Send to Act! and select to create a note, history, or activity.
Print selected records	Select records, then on the File menu, click Quick Print Selected.
Run a Smart Task for a contact	1. On the Schedule menu, select Run Smart Task. 2. Select a Smart Task from the list. 3. Click Run.
Schedule a meeting with multiple contacts (in the Contact List)	SHIFT + F8, then CTRL + M
Send a contact's vCard	1. Open a Contact Detail view, or from the Contact List, select multiple contacts. 2. On the Contacts menu, click Send vCard.
Synchronize calendar with Outlook® or Google™	On the Schedule menu, click Synchronize Calendar with Outlook or Synchronize Calendar with Google.
Update contact with company info	
View (access) a previous contact lookup	1. On the Navbar, click Contacts. 2. On the Lookup menu, click Previous.