

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
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 a wizard or dialog box: Press F1.

Help: Click , or 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 www.act.com/community

Knowledgebase: Go to <http://support.act.com>

Training: Go to www.act.com/product/2009/training

By Phone

Customer Service: Call 1-877-386-8083.

Technical Support: Call 1-800-992-4564.

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Quick Reference Card for ACT! 2009 (11.0) Solutions

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
Attach a shortcut to a file		
Insert a note		F9
Record history		CTRL + H

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

Clear a selected 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
View the Mini-calendar		F4



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
Run a report		CTRL + R
Print labels and envelopes		ALT + F, then CTRL + P

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

Finding and Viewing Information

Add or remove columns on list views and tabs

1. On the list view or tab, click **Options**. 
2. Select **Customize Columns**. 
Note: You add or remove columns using fields.
3. 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.)
4. 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.)
5. To change the column order: Click **Move Up** or **Move Down**.
6. Click **OK**.

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.

Filter information on Dashboards

1. On the navigation bar, click **Dashboard**.
2. From the list, select a dashboard.
3. In the component, click the **Filter** button.
4. Select options.
5. Click **OK**.

Find information using lookups

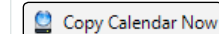
1. From the **Lookup** menu, select any contact lookup item (such as First Name).
or
Click **Groups**, **Companies**, or **Opportunities**. From the expanded list of lookup items, select one.
2. In the field, type the information to search for or select from the list.
3. Click **OK**.

Working Effectively and Sharing Information

Copy a Dashboard

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


Copy data between ACT! and Outlook calendars



Duplicate a contact



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 in Contact, Group, Company List

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

Print the current window



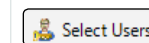
Record a history for multiple contacts (in the Contact List)

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 users to view public data



Turn on Tag Mode (in the Contact List)

SHIFT + F8

Update a contact with company information



View (access) a previous contact lookup

From the **Lookup** menu, click **Previous**.