Navigating in Act! Premium Mobile

Tip: You can search from the Home page by tapping in the Search field, typing your search criteria, and then tapping Go.

Displaying Information	
Expand/collapse page sections	00
Open a selection list	0
Open a date selector	•
Reload/refresh page	C
Set preferences to change what you see and how Act! Premium Mobile behaves	Q o

Using Act! Premium Mobile on a Tablet	
Open the left pane list	Rotate your tablet to the left or right to activate landscape view and display the left pane list.
Scroll through records using the left pane list	Tap a record in the left pane to display the record's details in the right pane.
Search using the left pane list	Tap in the Search field, type your search criteria, and then tap Go. Search results display in the left pane. Tap a record in the left pane to display the record's details in the right pane.

Getting Help	
Open Help	?
Use Help Search	Tap ②. In the text box, type a keyword. Tap Search Help.
Browse the Table of Contents	Tap 1. Tap Table of Contents. From the list, tap to expand the item or select a topic.
Return to Help Home	Tap the Home button.

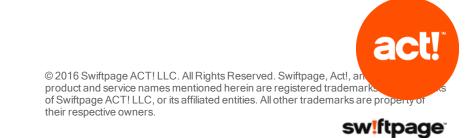


Quick reference card

For Act! Premium Mobile v19

Accessing Act! Premium Mobile	
My Act! URL	
Save my Act! URL	Android: Press Menu, then tap Add bookmark or Add to homescreen. iPhone/iPad: Tap tap Bookmark Add to Home Screen, then tap Save.
Log On	Enter the URL/address for the site. Enter your user name and password. To have Act! remember your information, tap Remember.
Log Out	In the footer, tap.

Navigating in Act! Premium Mobile	
Add an item	•
Edit an item	•
Save the item	
Cancel the action	0
Go to the Home page	*
Go back to the previous page	0
Go to the top of the page	0



For additional assistance, see the <u>Knowledgebase</u> or contact <u>Technical Support</u>. To exit Help, close the window or tab.

Working with Con	tacts
	On the Home page, tap New Contact.
Add a contact	On the New Contact page, type information in the fields.
	3. Tap
	On the Home page, tap the Search text box to make it active.
Search for a contact	2. Type the first letters of the contact's name.
COIIIaCi	3. Tap Go.
	4. Tap to open the details.
	Open the contact's detail page.
	Under Quick Actions, tap Call Phone or Call Mobile.
Phone a contact *	or
	Under Details, tap the phone number.
	* Available on devices with telephone capabilities.
	Open the contact's detail page.
	Under Quick Actions, tap Write Email.
Send an email*	or
	Under Details, tap the email address.
	* Available on devices with native email program.
	Open the contact's detail page.
Add or edit a note for a contact	2. Tap Notes.
	To add a note, tap , type the note, and then tap .
	To edit a note, tap the note, edit the details, and then tap
Add a history for a contact	Open the contact's detail page.
	2. Under Quick Actions, tap Record History.
	3. Tap in the fields to complete the details of the history.
	4. Tap

Working with Con	tact	s
	1.	On the Home page in the Go To section, tap Groups.
	2.	In the Groups list, tap the group you want to add the contact to.
Add a contact to a group	3.	Тар № .
	4.	In the \ensuremath{Who} section, tap $\ensuremath{\bullet}$ and tap the contact(s) you want to add.
	5.	Тар 💾.

Working with Activities	
Schedule an activity	On the Home page, under Quick Actions, tap Schedule Activity
	2. Enter information or select from lists.
	3. Tap
Reschedule or make changes to an activity	Open the calendar or the Task List.
	2. Tap the activity to select it.
	3. Tap 🔊 . Edit or change information in the fields.
	4. Tap
Close (clear) an activity	1. Open the Task List.
	2. Tap the activity to select it.
	3. Under Quick Actions, tap Clear Activity.
	4. Enter information about the outcome of the activity.
	5. Tap
Re-open a cleared activity	1. Open the Task List.
	2. Tap Filters.
	3. Tap Show Cleared
	4. Tap the activity to select it.
	5. Under Quick Actions, tap Unclear Activity.

Working with Groups	
Add a group	 On the Home page, under Go To, tap Groups. Tap . Enter/type information in the fields. Tap .
Associate or disassociate contacts from a group	 Open the group's detail page. Tap . Expand the Who section. To associate a contact tap ., select one or more contacts, and then tap . To disassociate a contact, tap next to the contact you want to disassociate.
Send an email*	 Open the group's detail page. Under Quick Actions, tap Write Email. * Available on devices with native email program.
Delete a group	 Open the group's detail page. Tap . Tap OK to confirm.

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