

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	
Open a selection list	
Open a date selector	
Reload/refresh page	
Set preferences to change what you see and how Act! Premium Mobile behaves	

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  . In the text box, type a keyword. Tap Search Help .
Browse the Table of Contents	Tap  . 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 v20

Accessing Act! Premium Mobile

My Act! URL	
Save my Act! URL	<ul style="list-style-type: none"> Android: Press Menu, then tap Add bookmark or Add to homescreen. iPhone/iPad: Tap , tap Bookmark or Add to Home Screen, then tap Save.
Log On	<ol style="list-style-type: none"> 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	
Go to the Home page	
Go back to the previous page	
Go to the top of the page	








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For additional assistance, see the [Knowledgebase](#) or contact [Technical Support](#). To exit Help, close the window or tab.





Working with Contacts

Add a contact	<ol style="list-style-type: none"> 1. On the Home page, tap New Contact. 2. On the New Contact page, type information in the fields. 3. Tap .
Search for a contact	<ol style="list-style-type: none"> 1. On the Home page, tap the Search text box to make it active. 2. Type the first letters of the contact's name. 3. Tap Go. 4. Tap to open the details.
Phone a contact *	<ol style="list-style-type: none"> 1. Open the contact's detail page. <ul style="list-style-type: none"> • Under Quick Actions, tap Call Phone or Call Mobile. <p>or</p> <ul style="list-style-type: none"> • Under Details, tap the phone number. <p>* Available on devices with telephone capabilities.</p>
Send an email *	<ol style="list-style-type: none"> 1. Open the contact's detail page. <ul style="list-style-type: none"> • Under Quick Actions, tap Write Email. <p>or</p> <ul style="list-style-type: none"> • Under Details, tap the email address. <p>* Available on devices with native email program.</p>
Add or edit a note for a contact	<ol style="list-style-type: none"> 1. Open the contact's detail page. 2. Tap Notes. <ul style="list-style-type: none"> • 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	<ol style="list-style-type: none"> 1. 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 Contacts

Add a contact to a group	<ol style="list-style-type: none"> 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. 3. Tap . 4. In the Who section, tap  and tap the contact(s) you want to add. 5. Tap .
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Working with Activities

Schedule an activity	<ol style="list-style-type: none"> 1. 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	<ol style="list-style-type: none"> 1. 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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none">1. On the Home page, under Go To, tap Groups.2. Tap .3. Enter/type information in the fields.4. Tap .
Associate or disassociate contacts from a group	<ol style="list-style-type: none">1. Open the group's detail page.2. Tap .3. Expand the Who section.<ul style="list-style-type: none">• 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 [*]	<ol style="list-style-type: none">1. Open the group's detail page.2. Under Quick Actions, tap Write Email. <p>[*] Available on devices with native email program.</p>
Delete a group	<ol style="list-style-type: none">1. Open the group's detail page.2. Tap .3. Tap OK to confirm.

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