



## 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.

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## Quick reference card

For Act!




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

## 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, CTRL + N.
Locate, open, and share a database	<ol style="list-style-type: none"> <li>On the <a href="#">File</a> menu, click <a href="#">Open/Share Database</a>.</li> <li>To open a listed database, select it, and click <a href="#">Open Database</a>.</li> <li>To share* a database, click <a href="#">Share</a>.</li> </ol> <p>*Requires Act! Admin or Mgr role.</p>
Open and use the Act! Scratchpad	<ol style="list-style-type: none"> <li>Double-click the desktop shortcut, or on the <a href="#">Tools</a> menu, click <a href="#">Act! Scratchpad</a>.</li> <li>Place your cursor in a line and begin typing. Click the tools to reorder, bold, italicize, and more.</li> <li>Click <a href="#">Send to Act!</a> and select to create a note, history, or activity.</li> </ol>
Print selected records	Select records, then on the <a href="#">File</a> menu, click <a href="#">Quick Print Selected</a> .
Run a Smart Task for a contact	<ol style="list-style-type: none"> <li>On the <a href="#">Schedule</a> menu, select <a href="#">Run Smart Task</a>.</li> <li>Select a Smart Task from the list.</li> <li>Click <a href="#">Run</a>.</li> </ol>
Schedule a meeting with multiple contacts (in the Contact List)	SHIFT + F8, select contacts, then CTRL + M
Send a contact's vCard	<ol style="list-style-type: none"> <li>Open a <a href="#">Contact Detail</a> view, or from the <a href="#">Contact List</a>, select multiple contacts.</li> <li>On the <a href="#">Contacts</a> menu, click <a href="#">Send vCard</a>.</li> </ol>
Synchronize calendar with Outlook® or Google™	On the <a href="#">Schedule</a> menu, click <a href="#">Synchronize Calendar with Outlook</a> or <a href="#">Synchronize Calendar with Google</a> .
Update contact with company info	
View (access) a previous contact lookup	<ol style="list-style-type: none"> <li>On the Navbar, click <a href="#">Contacts</a>.</li> <li>On the <a href="#">Lookup</a> menu, click <a href="#">Previous</a>.</li> </ol>