ACT! by Sage

Quick Reference Card
for ACT! 2007 (9.0)

Navigating in the ACT! Contact, Group, and Company Views

View the Activities tab	ALT + F9
View the Company List	ALT + F10
View the Contact Detail view	F11
View the Contact List	F8
View the Daily Calendar	SHIFT + F5
View the Group List	F10
View the Groups/Companies tab	CTRL + F9
View the History tab	SHIFT + F9
View the Mini-calendar	F4
View the Monthly Calendar	F5
View the Notes tab	ALT + SHIFT + F9
View the Opportunity List	SHIFT + F7
View the Task List	F7
View the Weekly Calendar	F3
View the 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: From the wizard or dialog box, press F1.

Online Help: From the **Help** menu, click **Help Topics**.

User's Guide: From the **Help** menu, click **Online Manuals** > **ACT! User's Guide**.

From your Internet Browser

ACT! User Community: Go to www.act.com/community

Knowledge Base: Go to http://support.act.com

Training: Go to www.act.com/product/2007/training

By Phone

Customer Service: Call 877-386-8083.

Technical Support: Call 800-992-4564.

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
Expand the drop-down list for the current field	F2
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

Working with E-mail (for E-mail View and New Message Window)

Create a message	CTRL + N
Delete a message or folder	CTRL + D
Find a message	CTRL + SHIFT + F
Forward a message	CTRL + F
Reply to a message	CTRL + R
Send a message	CTRL + ENTER

Note: The online Help lists more keyboard shortcuts.

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Customizing List Views and Tabs

Change content and layout to make data display how you want it to.

Add or remove columns	1. On the list view or tab, click **Options**. 2. Select **Customize Columns**. 3. To add a field: in the **Available fields** list, select a field, and then click the right arrow. (Or, click the double right arrow to add all fields.) 4. To remove a field: in the **Show as columns in this order** list, select a field, and then 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**.
Rearrange columns	1. Display the list view or tab. 2. Click and hold on a column label, and then drag the column to a new position.
Resize columns	1. Display the list view or tab. 2. Hold the pointer over the edge of a column until the pointer changes to a double-headed arrow. 3. Drag the edge of the column to the right or left.
Sort items in a list view	1. Display the Contact, Group, or Company List view. 2. Click a column label to sort the list based on that column. 3. Click again to reverse the sort order.
Sort items in a list view using multiple fields	1. Display the list view. 2. From the **Edit** menu, click **Sort**. 3. In the **Sort** dialog box: • In the **Sort by** field, select a field, and then select **Ascending** or **Descending**. • In the **and then by** field, select a field, and then select **Ascending** or **Descending**. • In the **and finally by** field, select a field, and then select **Ascending** or **Descending**. 4. Click **OK**.

Working Effectively

Check spelling	In documents and e-mail messages, press ALT + F7.
Create activity series	1. From the **Schedule** menu, point to **Manage**, and then click **Activity Series Templates**. 2. In the **Activity Series Template Creation Wizard**, select **Create a new activity series**, and then click **Next**. 3. Follow the directions on the pages, pressing **Next** to advance. For field definitions, press F1.
Customize the navigation bar	1. From the **Tools** menu, point to **Customize**, and then click **Navbar**. 2. In the **Customize Standard Menu** dialog box, drag commands to and from the navigation bar. **Note:** Click Reset to restore the default settings.
Print calendars	1. Display a calendar view. 2. On the toolbar, click **Print Calendar**. 
Refresh views	Press CTRL+F5.
Set activity alarm	1. Open the activity. 2. In the **Schedule Activity** dialog box, in the **Ring Alarm** field, select how long before the activity you want the alarm to sound, and then click **OK**.

Using Tag Mode

Add data and schedule activities for several contacts at once.

Add a note or history item to multiple contact records	1. In the **Contact List**, select **Enable Tag Mode** (SHIFT+F8). 2. Select the contacts you want to tag, and then: • To add a note, press F9. • To add history, press CTRL+H.
Schedule a call, meeting, or to-do item with multiple contacts	1. In the **Contact List**, select **Enable Tag Mode** (SHIFT+F8). 2. Select the contacts you want to tag, and then: • To schedule a call, press CTRL+L. • To schedule a meeting, press CTRL+M. • To schedule a to-do, press CTRL+T.