Sage ACT!

Quick Reference Card

for Sage ACT! Pro 2011 and Sage ACT! Premium 2011

Displaying Information

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
Refresh	F5
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

Featured Videos: From the **Welcome Page**, click a Featured Video, or click **More Videos**.

Help: From the global toolbar, click **Help Topics**.

Quick Start Guide: From the **Welcome Page**, under **Getting Started**, click **Quick Start for New Users**.

Access Service and Support, Contact Info, and the Knowledgebase: From the **Help** menu, click **Service and Support** > select an option.

Access Links to Communities: From the **Welcome Page**, under **Sage ACT! Communities**, select an option.

Adding Your Information (for Detail Views)

Add a contact, group, company, or opportunity	Press Insert
Add a history	CTRL + H
Add a note	F9
Attach a file	CTRL + I
Attach a shortcut to a file from the History tab	

Scheduling Activities & Tasks

Schedule a call	CTRL + L
Schedule a meeting	CTRL + M
Schedule a to-do	CTRL + T
Clear a selected activity	CTRL + D
Display the Timer	SHIFT + F4
Reschedule an activity	CTRL + SHIFT + D

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
Create e-mail marketing messages	
Print labels and envelopes	ALT + F, then CTRL + P

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

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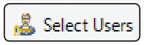
Searching and Viewing Information

Search using a lookup	1. From the global toolbar, click **Search**. 2. From the **Field** list, select a field to search. 3. In the field, type the information to search for or select from the list. 4. Click **OK**.
Use the Back and Forward buttons to navigate through views	• On the global toolbar, click the **Back** button to go back to previous views. • Click the **Forward** button to go forward in views. To see a list of your most recently accessed views: 1. Click the drop-down arrow on the **Back** button. Your current view is underlined and bold in the list. 2. Select an item in the list to go to that view.
Create a list of favorite reports	1. From the Navbar, click **Reports**. 2. Select the **Favorites Reports** check box next to the report.
Filter histories by type on the History tab	1. From a Detail view, click the **History** tab. 2. From the **Types** list, you can: • Click the plus sign to expand the category to view the associated types. • To clear a history type, select the check box. **Tip:** Clearing the top-level category clears all types in that category. • Select **None** to clear all types and categories. • To select individual types, click the check box. • To select all types in the category, click the top-level category.
Find contact and company information on the Web	1. From a Contact or Company Detail view, click the **Web Info** tab. 2. Select a site from the list on the left. The internal browser opens and displays a Web page for the selected site.

Working Effectively and Sharing Information

Add a history for multiple contacts (in the Contact List)	SHIFT + F8, select contacts, CTRL + H.
Copy a Dashboard to use in a presentation	Right-click on a Dashboard, select **Copy to Clipboard**.
Duplicate a record	
Edit fields in 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	Select records, then from the **File** menu, click **Quick Print Selected**.
Run a Smart Task for a contact	1. From the **Schedule** menu, select **Run Smart Task**. 2. Select a Smart Task from the list. 3. Click **Run**.
Schedule an activity with multiple contacts (in the Contact List)	SHIFT + F8, then: CTRL + L (call) CTRL + M (meeting) CTRL + T (to-do)
Select other users to view their public data	
Send a contact's vCard	1. Open a **Contact Detail** view, or from the **Contact List**, select multiple contacts. 2. From the **Contacts** menu, click **Send vCard**.
Synchronize calendar with Outlook®	From the **Schedule** menu, click **Synchronize Calendar with Outlook**.
Update a contact with company information	
View (access) a previous contact lookup	1. From the Navbar, click **Contacts**. 2. From the **Lookup** menu, select **Previous**.