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 Foward	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 **Welcome Page**, click a Featured Video, or click **More Videos.**

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

Quick Start Guide: On the **Welcome Page**, under **Getting Started,** click **Quick Start New Users**

Access Service and Support, the Knowledgebase, and Links to Communities: On the **Help** menu, click **Online Support** > select an option.

12-32324 C51300 07/12

Quick Reference Card

for Sage ACT! Pro 2013 and Sage ACT! Premium 2013

Sage ACT!

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
Reschedule an Activity	CTRL + SHIFT + D

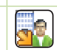
Communicating with Contacts, Groups, and Companies	
Write an Email Message	ALT + I, then CTRL + E
Write a Letter	ALT + I, then CTRL + L
Write a Fax Cover Page	ALT + I, then CTRL + F
Write a new Document (word processor)	ALT + I, then CTRL + N
Create Email Marketing messages. Requires Internet access and a Sage Connected Services account.	
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	1. In the Search text box, type your search term or terms. Click **Go.** 2. Select or clear **Show Only** and **Last Edited** filters to narrow your search. 3. To go to an item in the search results, click the hyperlink.
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. • Your current view is underlined and bold in the list. To see a list of your most recently accessed views: 1. Click the drop-down arrow on the **Back** button. 2. Select an item in the list to go to that view.
Create a list of favorite reports	1. On the Navbar, click **Reports.** 2. Select the **Favorites Reports** check box next to the report.
Filter histories by type on the History tab	1. On 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. On a Contact or Company Detail view, click the **Web Info** tab. 2. Select a site from the list on the left, and the web page for the selected site displays on the right.
Find Connected Services* to help your productivity	1. On the Navbar, click **Connections.** 2. Click a hyperlink to use, manage account, or learn more. *Requires Internet access and may require a Sage Connected Services account.

Working Effectively and Sharing Information

Duplicate a Contact	
Expand the drop-down list	F2
Export list data to Excel®	
Insert note for multiple contacts	SHIFT + F8, select contacts, F9.
Locate, open, and share a database	1. On the **File** menu, click **Open/Share Database.** 2. To open a listed database, select it, and click **Open Database.** 3. To share* a database, click **Share.** *Requires Sage ACT! Admin or Mgr role.
Open and use the Sage ACT! Scratchpad	1. Double-click the desktop shortcut, or on the **Tools** menu, click **Sage ACT! Scratchpad.** 2. Place your cursor in a line and begin typing. Click the tools to reorder, bold, italicize, and more. 3. Click **Send to Sage ACT!** and select to create a note, history, or activity.
Print selected records	Select records, then on the **File** menu, click **Quick Print Selected.**
Run a Smart Task for a contact	1. On the **Schedule** menu, select **Run Smart Task.** 2. Select a Smart Task from the list. 3. Click **Run.**
Schedule a meeting with multiple contacts (in the Contact List)	SHIFT + F8, then: CTRL + M
Send a contact's vCard	1. Open a **Contact Detail** view, or from the **Contact List,** select multiple contacts. 2. On the **Contacts** menu, click **Send vCard.**
Synchronize calendar with Outlook® or Google®	On the **Schedule** menu, click **Synchronize Calendar with Outlook** or **Synchronize Calendar with Google.**
Update contact with company info	
View (access) a previous contact lookup	1. On the Navbar, click **Contacts.** 2. On the **Lookup** menu, select **Previous.**