









Buttons and Shortcuts









Working with the Contact Record

	Create a Contact Record	CTRL+N
	View another record in a new window	
	Dial the contact's telephone number	ALT+1
	Insert a note for this contact record	CTRL+I
	Start the timer/Stop the Timer	F8/SHIFT+F8
	Reset Timer	ALT+F8
	Restart Timer	CTRL+F8
	Time incoming call	
	Edit contact's record	CTRL+E
	Add a Note	CTRL+I
	Search for a term (within a record)	F3
	Next/Previous Record	PgDn/PgUp
	First/Last Record	CTRL+PgUp/PgDn

Searching

	Open the Contact Search Center and begin a query	
	Open and close the Org Chart	CTRL+Q
	Create and activate personal or public groups of contacts	
	Create and activate personal or public subsets of contacts	
	Search in all Fields	
	Search details	

Scheduling, Viewing, and Completing Activities

	Schedule a call	
	Schedule a next action	
	Schedule an appointment	
	Schedule a forecasted sale	
	Schedule a To-Do	
	View your Calendar	F7
	View your Activity List	F6
	View Contact Summary	CTRL+S
	View Fields	CTRL+F
	View Notes	CTRL+N
	View Additional Contacts	CTRL+C
	View Details	CTRL+D
	View Referrals	CTRL+R
	View Pending activities	CTRL+P
	View History	CTRL+H
	View Linked documents	CTRL+L
	View Groups in which a contact is a Member (subset of database)	CTRL+M
	View Automated Processes' track	CTRL+T
	View linked Opportunities	CTRL+Y
	View linked Projects	CTRL+J
	Complete an activity	