act!™ Premium Mobile

act today

What is it?

- Live database access
- Changes instantly available
- No syncing
- Add, Edit, Delete Contacts, Opportunities, History, or Activities
- Make a call (and record history)
- Send an email (and record history)
- Map an address
- Create a history
- View Calendar or Task List
- Search contacts, notes, history, or opportunities

- No History List View
- No Dashboard or Reports

Login

Logging In

1. Open a browser
2. Enter the URL given to you by your Act! Administrator (e.g. http://afwdemo.act.com/apfw/m)
3. Select a database, if necessary
4. Enter your Username:
5. Enter Your Password:

\+ Remembering the username will NOT remember the password.

6. Select Log On

Adding to Home Screen

To add the mobile client to phone/iPad:

Android:

1. Touch the Action Icon (vertical dots) to bookmark the site. Touch the star symbol to add it to favorites. Modify the name if you like and select Save.)
2. On the device, press and hold an unoccupied space with your finger for about 2 seconds to add the bookmark icon.
3. Select **Shortcuts**.
4. Select **Bookmark**.
5. Select bookmark you just created.

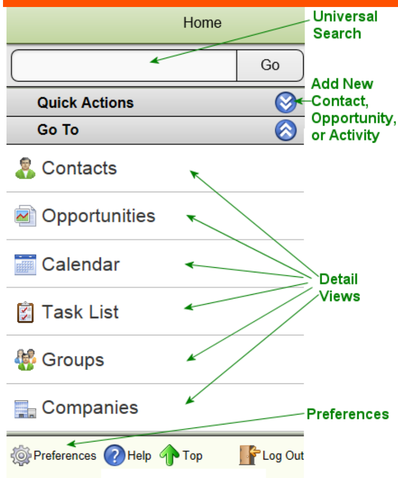
iPhone and iPad:

1. Touch the Action icon.
2. Select **Add to Home Screen**.
3. Modify the name if you like.
4. Select **Add**.

Logout

Touch **Log Out** button at lower-right.

Home screen



- Title bar (Home)
- Universal search bar

\+ *Searches ALL areas (fields, Notes and History). So don't use unless desperate. Select record type first.*

- Quick Actions
- Go To
- Preferences and Logout

Adding a record

1. Under Quick Actions, select **New.**.
2. Enter information
3. **Save**

Look Up Contact

1. In **Go To** section, select the **Contacts** icon
2. In the **Search** bar, enter any part of the Company or Contact name.

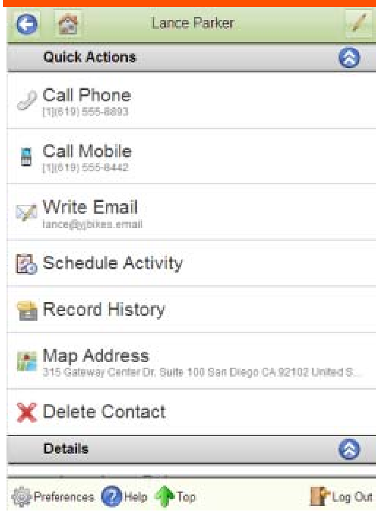
\+ *This is an incremental search. It searches all Contact fields (Company, Contact, Address, email, etc.) and displays all matches as you type.*

3. Select contact when you see it.

Icons

Home icon	Back arrow
Add	Edit
Save	Cancel
Collapse	Expand
Clear Search	Settings

Contacts View



- Back Button (returns to previous view)
- Home (returns to Home screen)
- Contact Name
- Edit (the current record)

Quick Actions

- Call Phone – Dials Phone field and starts history. For other phone numbers, dial from Details section.
- Call Mobile – Dials and starts history
- Write Email – Launches Email window and starts history
- Schedule Activity – Creates activity
- Record History – Creates history
- Map Address – Opens a separate window. Can then select Get Directions if desired
- Delete Contact – Must answer OK.

Details / More Details

All fields can display, but only business card fields display by default.

Details

- Most common fields
- Only populated fields display
- Can also email or dial from here

More Details

- Additional fields determined by Preferences settings

Related Items

Like the Tabs in Act!, includes ALL Activities, Notes, History, Group Membership, and Opportunities for this record.

act!™ Premium Mobile

Editing Records

Editing fields

1. Select **Edit** button at upper right.
2. Edit mode displays all fields, including drop-downs.
3. Make changes as desired.
4. Select **Save** (or Cancel)

Adding history

1. Look up contact (or opportunity)
2. Under Quick Actions select **Record History**
3. Select History type (Call Completed is the default)
4. Enter or select a **Regarding**.
5. Change **Date**, **Time** and **Duration** as desired.
6. Under **Who** section, Add more Contacts or Share With Opportunities as desired, by selecting Add, type name of the contact or opportunity (difficult to scroll), select and **Save**.
7. Add **Details**.
8. Don't forget to **Save**

Preferences

Preferences are used to select and arrange fields for Contacts, Companies, Groups, Opportunities, and Products.

1. Select **Preferences** icon at the lower left.
2. **Customise Contact View** or select one of the other views.
3. Select **Preferences** widget at right of section to customise.
4. Put a check in the fields you wish to display on your device.
5. Select **OK**.
6. Arrange the fields to your preferences, using the Up and Down arrows.
7. Select the **Save** icon.

\+ *Preferences are created and saved by device.*

Set Up Mail Server

Set up the Outgoing Mail settings to enable Act! to record complete email message in History of current record.

International Dialing

Turn this feature on to use an international dialing prefix when dialing phone numbers

Calendar

View options

- List, Day, or Month (first day of week set in Preferences)
- Today button at lower left

Editing an Activity

1. Select an Activity to Edit or Erase.
2. Select the **Edit** button.
3. Make changes.
4. Select **Save**.

Clearing an Activity

1. Select an Activity to edit.
2. Under Quick Actions, select **Clear Activity**.
3. Enter Details if you like.
4. Select Follow-up Activity if you like or just select...
5. **Save**

Task List

1. Select Filter expand icon
2. Filter by Dates, Type, Priority, Timeless, Cleared, or Users.
3. **Reset Default Filters** will change the filter to All... for every option except Users which is changed to your name.
4. Collapse the filter.

\+ *Alarms will only ring if you are in app.*

Opportunity List

Filtering the list

1. Select Filter expand icon
2. Filter by Dates, Status, Record Mgr, Process, or Stage.
3. **Reset Default Filters** will change all filters to All.
4. Collapse the filter.

Editing an Opportunity

1. From the Opportunity List, select the Opportunity.
2. Select a Quick Action: Schedule Follow-Up, New Note, Record History, Duplicate
3. Select the **Edit** icon at upper right.
4. Don't forget to **Save**.

Closing an Opportunity

1. From the Opportunity List, select the Opportunity.
2. Select the **Edit** icon at upper right.
3. Change the Status to Closed-Won or Closed-Lost.

Opportunities

Adding an Opportunity

1. Lookup the contact (so that the new opportunity will be associated with the contact.

\+ *It will NOT be associated with a Linked Company record. You will have to manually do that back in Act!*

2. Under Related Items, select **Opportunities**.
3. Select the **Add** icon.
4. Enter Name, select Process and Stage, add more Contacts as desired.
5. Under More Details, enter Estimated Close Date.
6. **Save**.

Adding Products (Total)

Once the new opportunity is saved, you are placed in the Opportunity Detail view where you can Add Products.

1. In the Related Items section, select Products.
2. Select **Add** icon.
3. Select or enter a product.
4. Change the Quantity if desired.
5. Enter a Price.
6. Add other details as desired.
7. Save.
8. Add more products if you like.
9. Select the **Back** button.
10. Modify other details of the Opportunity as desired.
11. Select **Back** to return to the Opportunity List or **Home** to return to the Home Screen.

\+ *Modify which fields to display in Opportunities and in Products using Preferences.*

Groups / Companies

Creating new Group or Co.

1. From the Home Screen select Groups or Companies.
2. Click **+Add** icon at upper right.
3. Enter the Name and other fields.
4. Click the **Who** section to expand.
5. Enter Criteria or click the + to manually add contacts.
6. Click the **Save** button.

Write email to Group

1. Select Group
   Under Quick Actions, select Write Email.