

Course Name: Chapter 04 - Managing Notes History & Attachments

Conditions for Success: act! should be installed, and have your meeting notes you wrote down in your notebook ready to enter into act!

Duration: 09:05

Objective	Key Objectives	Discussion Point in Video
1	Enter a history on a contact record	00:32
2	Enter a note and explain the differences between notes and history when it comes to act!	01:30
3	Enter a History to a Contact Record	04:09
4	Describe the first method of attaching files to contacts	02:29
5	Express the differences and explain the author's recommendations	05:50
6	Attaching Web Pages to Contacts + Driving Directions	06:06

Important Short Cuts

Key	Result
F9	Insert a New Note
CTRL-H	Records History
CTRL-I	Attaches a file to a contact (Short Cut Method)