Impact

User Manual

Prepared by: Administrator
Date: 10/14/2014

Impact

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Impact Suite on-line help

Use the panels below to find add-on solutions for your act! software. Use the search feature above to find articles matching specific criteria, or browse the categories below.

Impact Suite | Report Designer | Impact Modules | Project Tracking | Custom Tables | Dashboard Designer

Act! Makeover | Videos | Other Add-ons | Support

New feature in Impact 5.1

If you are still unable to find an acceptable solution you can purchase a support agreement below.

Yearly Maintenance Agreement	learn more	Yearly Maintenance Agreement $99
Yearly Support Agreement	learn more	Yearly Support Agreement $199
Quick Start Program	learn more	Quick Start Program $299

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Impact Suite
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Report Runner
Tables List Plus
Opportunity List Plus
Contact List Plus
Dashboard Plus
Task List Plus

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Whats new in 5.1

This page details what is new with each service patch for Impact Suite.

Service Patch 1 build Impact Suite (build 5.1.0.25) and above

Support for Act! 16.1

- Added support for the new add-on manager
- Added the new e-Marketing shortcut
- Added the new Marketplace shortcut.

- **Project Tracking**
  - Automatically adds the required tables when turning on "Project Tracking" Read more
  - Totals custom fields such as 'travel time' or ' billable hours'
  - Ability to display projects on the timeline view. Read more
  - Option to hide the projects on the standard schedule form while still displaying on the timeline. Read more
  - Group by any character field in the project table such as record manager or category. Read more
  - Select a customized data entry form for the project record. Read more

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Properties

Article ID:	whats_new
Views:	1565
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Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	5/28/2014 9:35 AM

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  - New indicators when the project range exceeds the visual timeline. Read more

- **Math Functions**
  - Added the ability to run formulas when opening and closing the form Read more
  - Added the ability to run formulas when changing act! records
  - Added the ability to run from the Windows Scheduler
  - Enhanced performance when using multiple math formulas.
  - Added option to calculate activity totals when the activity list is added to a custom table.

- **Designer enhancement**
  - New! - Cascading drop downs control. Read More
  - New! - Panel control with sub totals. Read more
  - Groupbox clear buttons. Read more
  - Added a button to lookup contact, companies, groups and opportunities. Read more
  - Added 'Spell as you type' checking to the memo control Read more
  - Group boxes and panels controls option to show a button to clear the controls on it
  - Look up controls for contact, company, group and opportunity on the custom tables.
  - Customizable Toolbar on child custom tables
  - Re-organized the toolbox buttons on the top toolbar
  - New child table options when adding new records: Attach Current Contact, Attact Parent Contacts, Attach No Contact, Pick from Contacts Attached, Pick from All Contacts

- **List Views**
  - Added the ability to open multiple records at the same time.
  - Added the option to highlight columns from the parent tables
  - Added the ability to customize column captions without altering the field names in the database
  - Task List only - Added ability to reschedule tasks with keyboard shortcuts
  - Added a 'virtual mode' switch for faster refresh with very large lists.
  - The A-Z navigation is now part of the "Touch Scroll (Windows 8)" preferences
  - Added a right-click menu option to assign the record managers and other values
  - Added a "Lookup All" button to the find panel.
  - Added the ability to only display active uses (hides inactive users)
  - Added the ability to display the unique record ID such as; ContactID, CompanyID, GroupID and OpportunityID

- **Act! Data entry**
  - New memo control for contact, company, group and opportunity detail views Read more
  - Memo control with spell checking Read more
  - Redesigned act! entity picker now remembers last filter and current look up criteria

- **Document Engine**
  - Added the ability to run a report from the 'Create Document' form.
  - Document engine now supports templates created with the Impact Report Designer (*.repx)

- **Opportunities**
  - Auto add contacts when creating a custom table record from opportunities
  - Add picture fields to the invoice templates
  - Added the 'Process' on the custom filters panels at the bottom of the list view

- **Import improvements**
  - Import_date stamped automatically
  - Connect to all found setting

- **Report**
  - Redesigned "Run Report" window.
  - Added option to Run Report inside act! or external process.
    Note - External processes are sometimes required due to network privilege setting.
  - Three run-time criteria modes; editable, default and append.
  - New 'Expression Editor' on the query builder expression column.
  - New 'Sub Query' builder/editor
  - Outlook support in the auto run feature
  - Run reports from act! views. Added an option to display the report in each act! view such as contact, companies and opportunities. (See Document Engine above)
  - Option to show/hide the details band

- New feature to import Crystal Reports
- Enhanced "Run Report' options allowing designers to limit the criteria options at run time.

- **Start up query**
  - Added the ability to filter the contact list at start up based a query named "Startup.QRY" Read more

- **Syncing**
  - Syncing between master and remote databases is now automatic

- **Custom Tables**
  - New! Duplicate a custom table; structure or structure and data.
  - Support for multi-Monitors when editing custom table records

See also

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Ask Questions
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How to Get Support
What is a PDF Manual

FAQs

Home > Welcome > FAQs

FAQs

Frequently Asked Questions

Can I test drive your add-ons?

Yes, all of our add-ons have a 30 day free test drive. You can download any modules or the Impact Suite on the page below:

http://www.durkincomputing.com/Download.aspx

How do I purchase?

Individual modules can be purchased by clicking the link below. After entering your credit card information, you will receive an **activation key by email** which can be entered into the evaluation version to register it.

http://www.durkincomputing.com/Purchase.aspx

Credit cards accepted: Visa, MasterCard, American Express and PayPal.

How to get support?

Durkin Computing offers **free technical support** to our customers and companies evaluating our products.

Technical Support:

Our technical support team is committed to providing superior support service, and is available Monday to Friday, 9AM-5PM Eastern Star answer inquiries within a few hours, and within two business days at most.

Email: Support@DurkinComputing.com

Does Durkin Computing do any consulting services?

Properties

Article ID:	faq2
Views:	266
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:32 PM
Last Modified:	3/24/2014 12:32 PM

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Consulting Services:

Durkin Computing is an authorized **SAGE Add-on Partner**. If you are looking for custom software, then contact us!

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Phone: 1 + (973) 625-1119

Is there a community forum?

Community Forum:

Whilst we cannot guarantee instant technical support via the **community forum** we will always try to assist quickly. For guaranteed assi
please use the **Ticket System.**

Goto Community Forums »

Is there a PDF manual I can read?

A PDF Manual is self-contained printable document which can be downloaded and distributed. The "PDF" format has become a widely accepted inte
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Click here for more information about the PDF standard.
If your computer does not have the PDF viewer installed, it can be downloaded from Adobe's website.

Durkin Computing provides both an online help system and a downloadable PDF manual on their website.

Advantages:

- Very portable. Easily downloaded, emailed, etc.
- Easy to print.
- Retains formatting, regardless of fonts installed.
- Widely accepted Internet standard.

Our PDF Manuals have the same content as the on-line help system, and they look and feel very different. See the example below:

Can it run on a Terminal Server or Citrix Server

Yes, please read this section for more info. Citrix or Terminal Server

See also

- Whats new in 5.1
- Ask Questions
- How to Order
- How to Get Support
- What is a PDF Manual

Ask Questions

Home > Welcome > Ask Questions

Ask Questions

Get help from Customer Support or other resources

Ask Someone

Post a question or search for an answer in our online community forum .

Customer Support

Contact our customer support department by email at support@DurkinComputing.com

Ask Us

If you're unable to find what you're looking for in this help system, try these alternative resources:

- Community Forum
- Knowledgebase
- FAQ

Contact our support department:
support@DurkinComputing.com

Phone: [PhoneSupportNumber]

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Modified By:	[Modified By]
Created Date:	3/24/2014 12:32 PM
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How to Order

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How to Order

The **Impact Suite**, individual add-ons or **The Impact Report** Designer can be purchased from our web site using the link below. Immediately after the transaction is processed you will receive an **activation key by email** which can be entered into the evaluation version to register it.

Step 1
Add items into your shopping cart from this page: http://durkincomputing.com/Purchase.aspx

Step 2
Verify your shopping cart and click green **CONTINUE**

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Properties

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Modified By:	[Modified By]
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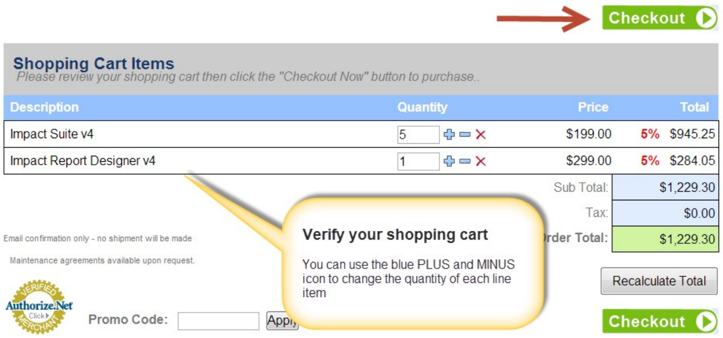
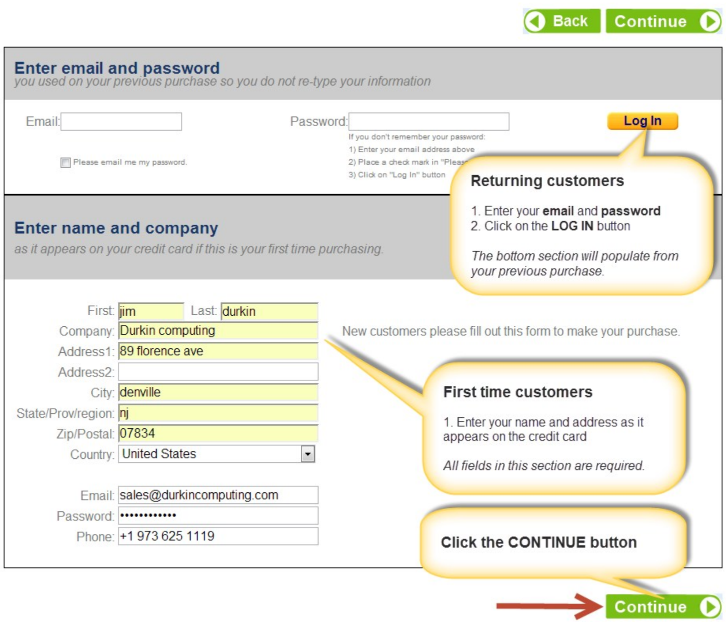
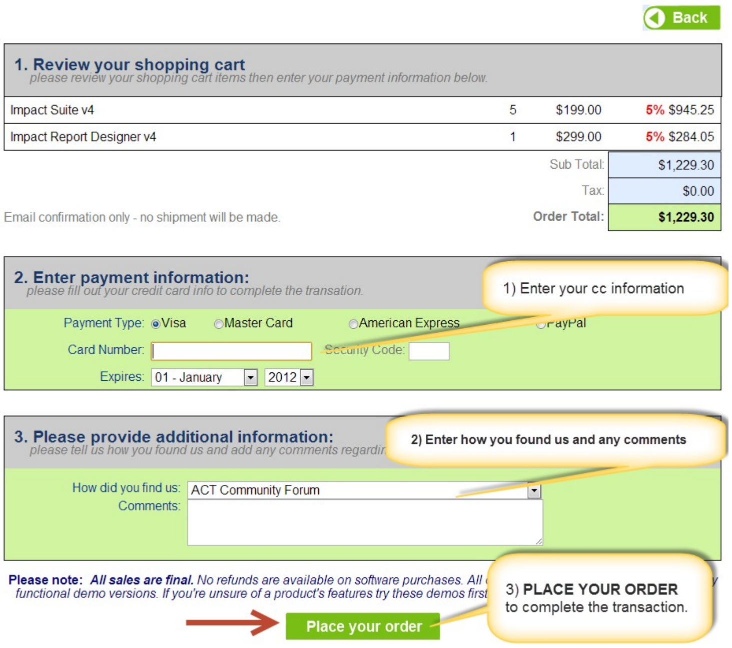


Step 3
Enter your billing information and click on the green **CONTINUE** button



Step 4
Enter your payment information, answer additional information and click the green **PLACE YOUR ORDER** button



Once the transaction is complete you will receive tow email:
1) An email receipt for your accounting records.
2) An email with your new serial numbers.

Credit cards accepted:

- Visa
- MasterCard
- American Express
- PayPal

To download an evaluation version use this link:
http://durkincomputing.com/Download.aspx

See also

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How to Get Support

[DurkinComputing] offers **free technical support** to our customers and companies evaluating our products.

Technical Support:

Our technical support team is committed to providing superior support service, and is available Monday to Friday, 9AM-5PM Eastern Standard Time. We typically answer inquiries within a few hours, and within two business days at most.

Contact Information:
Email: Support@DurkinComputing.com
Phone: [PhoneSupportNumber]

Community Forum:

Whilst we cannot guarantee instant technical support via the **community forum** we will always try to assist quickly. For guaranteed assistance from our staff please use the **Ticket System.**

Goto Community Forums »

Consulting Services:

[DurkinComputing] is an authorized **SAGE Add-on Partner**. If you are looking for custom software, then contact us!

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Email: Sales@DurkinComputing.com
Phone: [PhoneSupportNumber]

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What is a PDF Manual

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What is a PDF Manual

A PDF Manual is self-contained printable document which can be downloaded and distributed. The "PDF" format has become a widely accepted internet standard for printing and distributing product documentation.

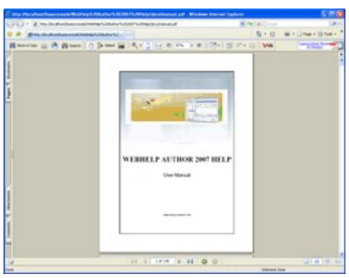
Click here for more information about the PDF standard.
If your computer does not have the PDF viewer installed, it can be downloaded from Adobe's website.

[DurkinComputing] provides both an online help system and a downloadable PDF manual on their website.

Advantages:

- Very portable. Easily downloaded, emailed, etc.
- Easy to print.
- Retains formatting, regardless of fonts installed.
- Widely accepted Internet standard.

Our PDF Manuals have the same content as the on-line help system, and they look and feel very different. See the example below:



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Impact Suite

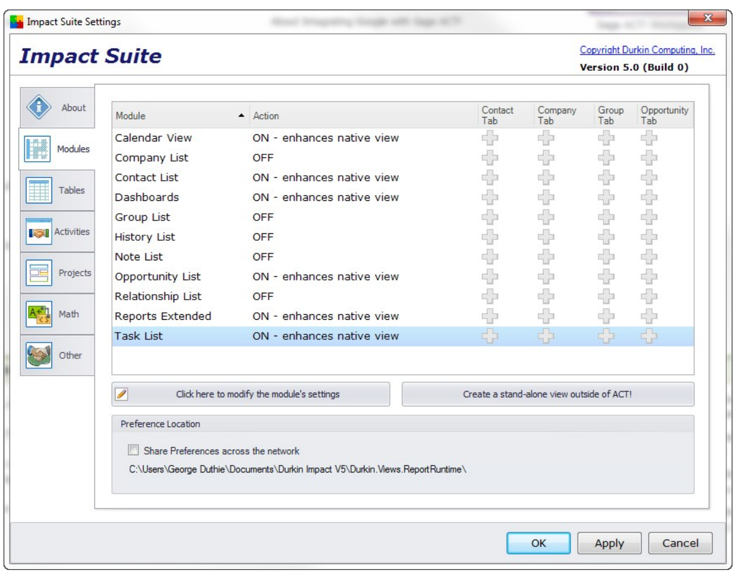
Getting Started | Settings and Options | Filter Panels | Pivot Table | Chart | Tables and Forms

Import Files | Math | Memo w/Spell Checking | Printing | How-To Examples

Impact Suite is a **collection of 10 add-ons** for ACT! also known as modules or plug-ins. Each has a unique purpose and can be purchased separately. Together they are a powerhouse of features extending the versatility of ACT!

To turn ON/OFF individual modules:

1. Install **Impact Suite** then launch ACT
2. Go to the TOOLS menu and select IMPACT SUITE
3. Change the drop down under Action to ON - enhances this view.
4. Clicking the grey plus signs will enhance that view under the tab



To turn ON/OFF modules or place other users in a 'Runtime' state please see Network Administration

Individual Add-ons

- Calendar View Plus
- Company List Plus
- Contact List Plus
- Group List Plus
- History List Plus

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Properties

Article ID: impact_suite
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Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 2:55 PM

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- Notes List Plus
- Opportunity List Plus
- Report Runner
- Tables List Plus (Formerly The Durkin Toolkit)
- Task List Plus

See also
- Welcome
- Report Designer
- Impact Modules
- Project Tracking
- Custom Tables
- Dashboard Designer
- Act! Makeover
- Videos
- Other Add-ons
- Support

Getting Started

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Add a Custom Table
Duplicate a Custom Table
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Color Rules
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See also

Settings and Options
Filter Panels
Pivot Table
Chart
Tables and Forms
Import Files
Math
Memo w/Spell Checking
Printing
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Article ID:	getting_started
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Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:11 PM

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Import Wizard

To import a custom table template into the ACT! database follow the below steps.

1. Click Tools
2. Click Define Custom Tables
3. Click Template Wizard under the wizards section on the window
4. Choose a table to install and click the next button
5. The tables to be installed will be shown
6. Click Install Now

See also

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Add a Custom Table
Duplicate a Custom Table
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Color Rules
Network Administration
Tables List Plus Web

Properties

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Views: 365
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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Table Templates

We know of other vendors who try a "one size fit all" approach, *our way or the highway* types. It doesn't work.

Many users install a template and start working today. While others heavily customize it so suite their business needs. Either way one of our templates is going to save you valuable time to get up and running quickly.

Click on one of the templates on the right to read more information on which one will work for you or contact us about additional templates.

Review templates

See also

Import Wizard
Add a Custom Table
Duplicate a Custom Table
In-List Filtering
Color Rules
Network Administration
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Properties

Article ID: table_templates
Views: 384
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:11 PM

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Add a Custom Table

Adding custom tables allows you to track information that would have been well-nigh impossible with native ACT!. Custom tables can include invoices, events, household items or inventory etc.

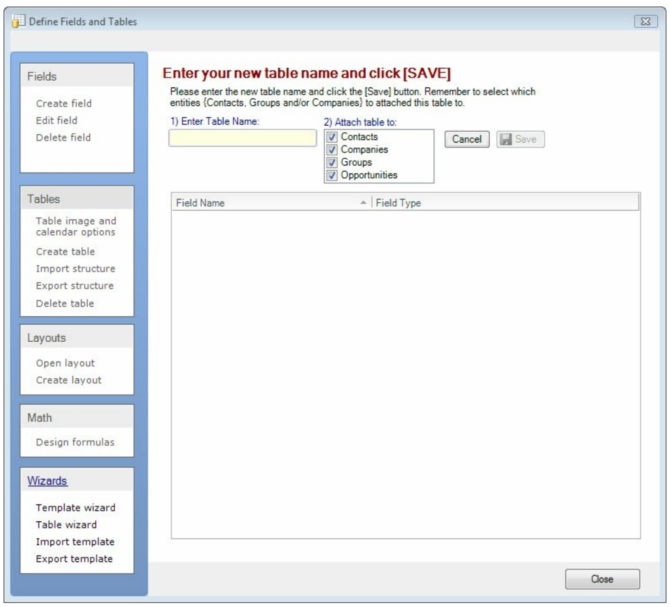
There are two ways to create a custom table:

- Use a table template that includes multiple fields.
- Design your table from scratch, by adding your own field list.

For more information please see: Your First Custom Table

To add a custom table follow these steps:

1. In ACT! go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. Click on the CREATE TABLE button
3. Enter the name of the custom table.
4. Select tables to attach to.
5. Click on the SAVE button



See also

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Article ID: add_a_custom_table
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Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:12 PM

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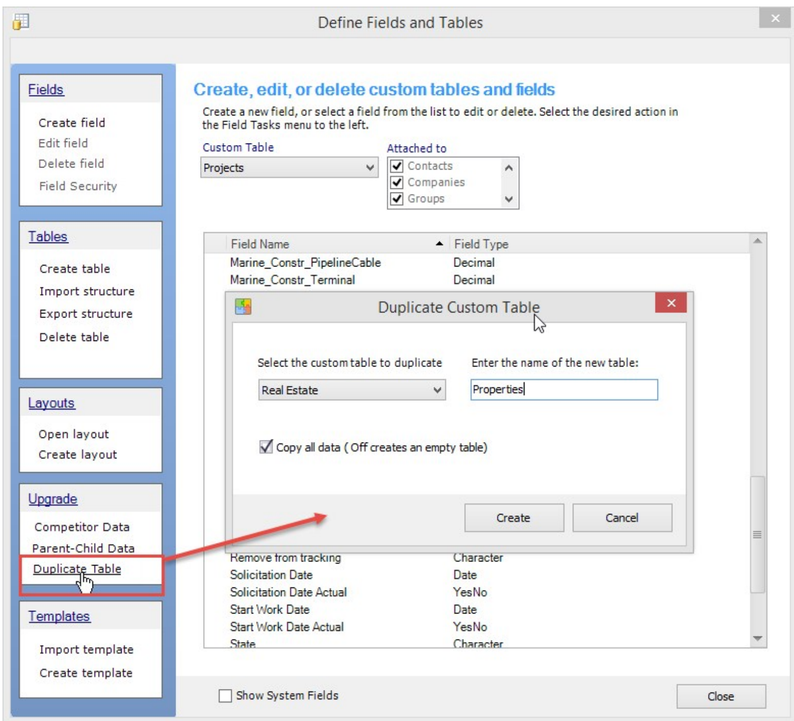
Duplicate a Custom Table

Many times you need to duplicate an existing custom table from one you have already designed. You may need an additional "Policy" table with the exact same fields. Rather then building this second table from scratch and manually adding each field you can duplicate an existing table with just a few clicks. Requires Impact Suite 5.1.05 or better.

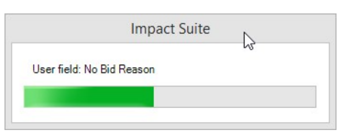
The duplicate function has an options to copy all data from the original table into the new duplicated table. This is a great feature hen you need to rename a table. You can duplicate the original table (with a new name) then delete the original source table. Duplicating a table may be required if your original table was created with a third party add-on which allowed space in the custom table name. Since Impact Suite uses the act! OLEDB2 SQL reader extensively we do not support spaces in table names. Renaming a table without spaces will be required when using Impact Suite..

Please follow these steps to duplicate a custom table.

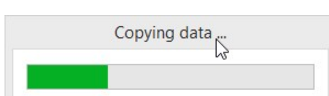
1. Open act and go to the TOOLS-> DEFINE CUSTOM TABLES menu
2. Click the Duplicate Table link on the lower left side.
3. From the drop down select the source table
4. Enter your new table in the text box
5. Remove the check mark from "Copy All Data" if you only need to fields
6. Click [Create]



You will see a progress bar as the new table and fields are created in your database.



If you have the the option "Copy All Data" checked you will see a second progress bar as each record is duplicated. If your source table has many records this progress bar may take a few minutes or longer to competed.



Once completed you will receive a dialog box.

Properties

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Views: 208

Created By: jimdurkin

Modified By: [Modified By]

Created Date: 3/24/2014 12:31 PM

Last Modified: 3/24/2014 1:12 PM

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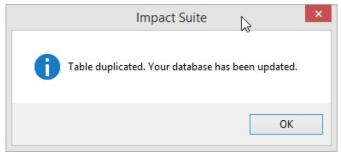

Note - The system fields such as Created Date and Edit date will be set to the current date. The 'Record Creator' and 'Last Edited By' will be stamped with the current user.

See also

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In-List Filtering

Find Panel

The Find Panel will find all occurrences of a word in the current list view.

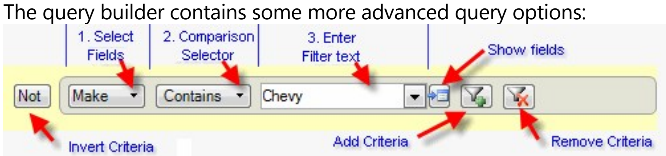
1. Type in the box the text to search
2. Click Find or Enter
3. Click clear to the clear the search and start a new one

Query Builder

The query builder allows you to design a single or a multi condition (advanced) query. A query is a method of filtering the list. Once you have designed a query, the list will be filtered on those conditions.

To create a new query:
1) Select the desired field to query
2) Select the comparison e.g. "Contains"
3) Enter a value e.g. "Chevy" then click "ENTER" on your keyboard

The query builder contains some more advanced query options:



1. Select Fields - Use this drop-down to select the ACT! field to filter on *Make*.

2. Comparison Selector - Use this drop-down to select the comparison operator e.g. "Contains" or "Starts With"

3. Enter Filter Text - Use this drop-down to enter the filter text e.g. "Chevy"

Properties

Article ID: in-line_filtering
Views: 316
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:12 PM

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4. Show Fields - This option uses values in a second field to be compared to the first.
Rather than using the value from ***3. Enter Filter Text***, this 0ption will use the value from a second field. "Does FieldA contain value from FieldB?"

5. Invert Criteria - Use this option to invert the filter criteria e.g. "Show me all cars that do not contain "Chevy"

6. Add Criteria - Use this option to add additional criteria line(s). "Show me all cars where the *Make* contains 'Chevy' and the *Make* contains 'Ford'.

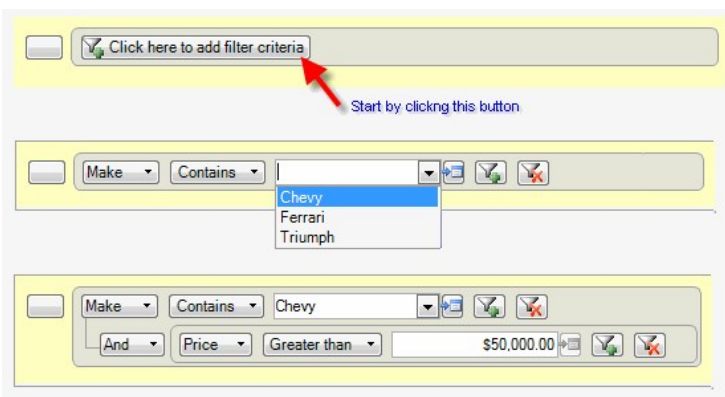
7. Remove Criteria - Use this option to remove additional criteria.

Here is a step-by-step example:

1. Click on the QUERIES button on the toolbar. 
2. Click on the CLICK HERE TO ADD FILTER CRITERIA button
3. Select *Make* from the fields drop-down.
4. Select *Contains* from the comparison drop-down.
5. Enter the value of 'Chevy' in the text box then click RETURN

If you would like to add additional conditions:
6. Click on the ADD CRITERIA button
7. Select *Price* from the fields drop-down.
8. Select *Greater Than* from the comparison drop-down.
9. Enter the value of '50000' in the text box then click RETURN

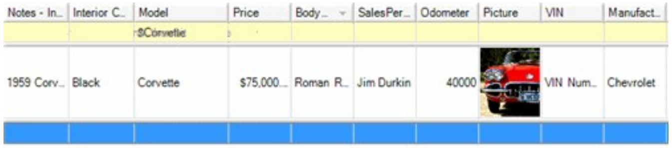
This query will return all rows where the make is Chevy and the price is greater than $50,000.



Filter Row

Filter row allows you to quickly filter the list at the top of any column. If you do place two values at the top of two columns the filter row will always use an "And" comparison condition. Filter row is different to the query builder in the fact that the filter row can not do advanced or multi-conditional queries.

1) To access the filter row, click on the FILTER button on the toolbar. 
2) You will now see a empty filter row at the top of the list, displayed in yellow.
3) Enter a filter in any column, e.g. "United States" in the country column.
4) Click "Enter' on the keyboard. You now have this filter in place.



To add additional conditions to the current filter, just enter the text in the column header and click "ENTER" again.

Operator	Condition
=	Equals
$	Contains
!$	Not Contains
>	Greater Than
<	Less Than
>=	Greater Than Or Equal To
<=	Less Than Or Equal To
<>	Not Equal
*	Begins With
NULL	Is Null
!NULL	Is Not Null
EMPTY	Is Empty
!EMPTY	Is Not Empty
(A,B)	Between Value A and B
!(A,B)	Not Between Value A and B
A,B,C	Multiple conditions

Here are some examples of filter conditions you can try:

To find all contacts whose Country is empty just type "EMPTY" in the filter row and click "ENTER"

To find all contacts whose Country is not empty just type "!EMPTY" in the filter row and click "ENTER" (Notice the explanation mark before the word)

To find all contacts whose Country is either Germany or France or the USA just type "Germany, France, United States" in the filter row and click "ENTER" (Notice each condition is separated by a comma)

To find all contacts that were edited this month just type "(8/1/2005-8/30/2005)" in the filter row and click "ENTER"

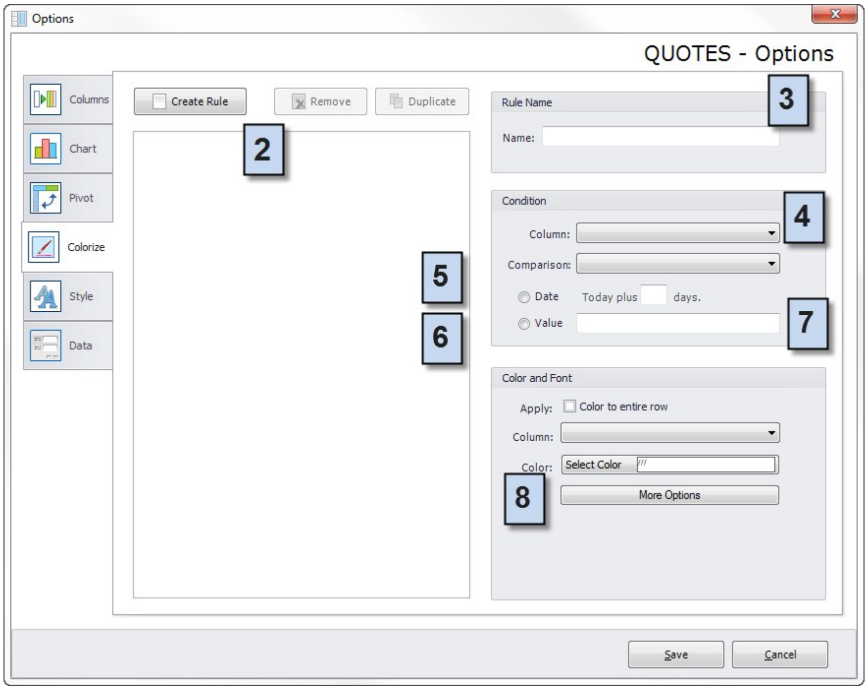
To find all contacts where a yes/no field is checked just select "TRUE" in the filter row and click "ENTER"

See also

Import Wizard
Table Templates
Add a Custom Table
Duplicate a Custom Table
Color Rules
Network Administration
Tables List Plus Web

Color Rules

Color rules are designed to colorize records for rows that match a condition. Color rules can be based on text condition like the one below. In this color rule we are making all rows blue where the word "Triumph" appears in the MAKE column.



Lets try a simple color rule like: "Make all the files that the Department = Sales highlighted in green"

1. First open the Color Rules window by selecting the **Color Rules** menu in **Settings**.
2. Click on the **Add** button at the bottom of the rules window.
3. Enter the **Rule Name** at the top of the window. Lets enter **Department = Sales**
4. Change the column to **Department**
5. Change the Comparison popup to **Contains.**
6. Change the Date/Value(s)/Custom radio selector to **Values(s)**
7. Enter the value of **Sales**into the **Value 1** field.
8. Click on the color button near the bottom of the window and select the color green from the color picker window. After you have closed the color picker window the color button will display the selected color.
9. Click on **Save**.

Now all you have to do is to close the rules window and click on the F5 key to refresh in the list.

Color Rules colorize all tasks in the list. Color rules can apply to multiple tasks like all 'Meeting' or to singular tasks like 'Details field = "Bring Projector"

Color rules are designed to colorize rows or columns from your activities that match any number of conditions. Immediately, we see three keywords: we need to **COLORIZE** tasks **FROM** the list that matches a **CONDITION**. Hence we have the most basic Color Rule structure:

COLORIZE "ColumnName" FROM the TaskList Where x=ColumnValue"

The **COLORIZE** keyword allows us to color one column or all columns such as Task Type, Regarding, Date, or location. These columns are all available to you when you select Customize Columns.

COLOR *Columns* FROM the Task List   Where x=ColumnValue"

Lastly, we want the color conditions. This is the 'Where' part of the select statement above.

For example, we may want to display the color Red where the type of activities are high priority. To do this, we use the **Color Rules** builder to create the condition. The rule is built for you by selecting just three simple conditions.

Properties

Article ID: color_rules2
Views: 229
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 7/18/2014 7:43 AM

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1. The column to apply the rule to
2. The comparison operator
3. The value to compare.
4. The color to highlight

In the example of activities where priority is equal to 'High' would read like this.

1. Column = **TaskType**
2. Comparison = **Equal**
3. Clause = **High**
4. Color = **Red**

In a sentence this would read. Display all files with **Red** where the **TaskType** column **contains** a values of "**High**".

Color rules are applied alphabetically. To change the order add letters to the front of each rule

a. Color Rule yellow
b. Color Rule blue
c. Color rule green

See also

Import Wizard
Table Templates
Add a Custom Table
Duplicate a Custom Table
In-List Filtering
Network Administration
Tables List Plus Web

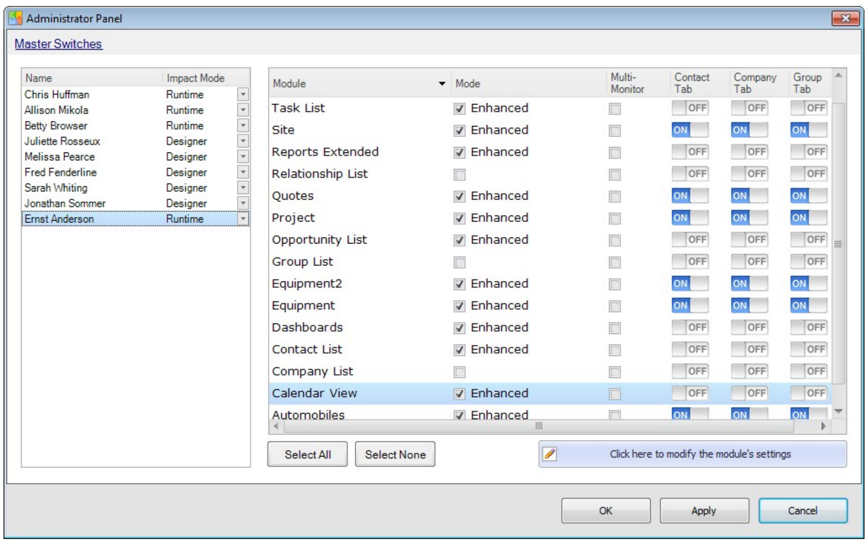
Network Administration

If you are installing Impact Suite on a Microsoft Terminal Server or a Citrix server and all the users do not need access to a specific module or custom table you can use our **Administration Panel** to select which users have access. To access this panel please follow these steps:

To open the administrators panel:
1) Log into ACT as the database administrator

2) Go to the **TOOLS** menu and select **IMPACT**...

3) On this form click on the "**Open Administrator Panel**" button



Use the drop down next to the user name to change the product mode: Mode options are designer, Runtime or bypassed.

Designer mode: The user has full access to change any setting or options. If the user is manager or above then the can also alter or change the custom tables fields and layouts.

Run time Mode: the user has limited access to only the modules specified in the Active column. Checking the mode column will allow the user to enhance the list view, checking the multi-monitor column will allow the user to move the list view to a separate monitor, swtiching the tab columns to on will allow the use to have the enhanced view on the tab.

Bypassed Mode: Impact has no effect inside the ACT interface. This option is used when only a limited number of users need access to modules while others need no Impact modules installed.

Bypassed mode is also useful when installing Impact on a terminal server and only the sales department need access. All other users on the server can be set to the bypassed mode.

See also

Import Wizard
Table Templates
Add a Custom Table
Duplicate a Custom Table
In-List Filtering
Color Rules
Tables List Plus Web

Properties

Article ID: administration
Views: 337
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:12 PM

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Tables List Plus Web

To install the files needed for the web install Impact Suite or Tables List Plus and run Act to copy over the data entry and column files. The data entry and column files are edited in the desktop version of Act. The web.dly and web.layout are the files to edit for the web.

To install the Tables List Plus Web download the installer and run the installer on your server where Act for Web is installed. After installation the IIS needs to be restarted.

To install the layout and columns you need to open Tables List Plus or Impact Suite on the Act for Web server and edit the web data entry form and web column layout for the web tables to consume.

See also

Import Wizard
Table Templates
Add a Custom Table
Duplicate a Custom Table
In-List Filtering
Color Rules
Network Administration

Properties

Article ID: tables_list_plus_web
Views: 201
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:12 PM

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Settings and Options

To get to the settings for Impact Business Suite in ACT! go to Tools > Durkin Impact

TO RESTORE FACTORY SETTINGS
These steps will reset your Durkin preferences back to the factory defaults.

1) Close ACT!
2) Go to START-> MY DOCUMENTS
3) Rename the folder “Durkin Impact V5” to “Durkin Impact V5 BAK”
4) Restart ACT!

To COPY setting from one PC to another
These steps will copy all the setting from one PC to a second PC.

From the good PC
1. Close ACT!
2. Go to START-> MY DOCUMENTS
3. Copy the folder “Durkin Impact V5” to a server drive

From the secondsPC
1) Close ACT!
2) Go to START-> MY DOCUMENTS
3) Copy the “Durkin Impact V5” DOWN from the server.
4) Answer yes when it asks you to overwrite.

Settings | Options | Options - Calendar | Calendar - Fields | Calendar - Color Rules

See also

Getting Started
Filter Panels
Pivot Table
Chart
Tables and Forms
Import Files
Math
Memo w/Spell Checking
Printing
How-To Examples

Properties

Article ID: settings
Views: 250
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:13 PM

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Settings

About	Modules	Tables	Activities	Templates	Math
Nav Bar	Other				

See also

Options
Options - Calendar
Calendar - Fields
Calendar - Color Rules

Properties

Article ID: settings2
Views: 213
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:13 PM

Actions

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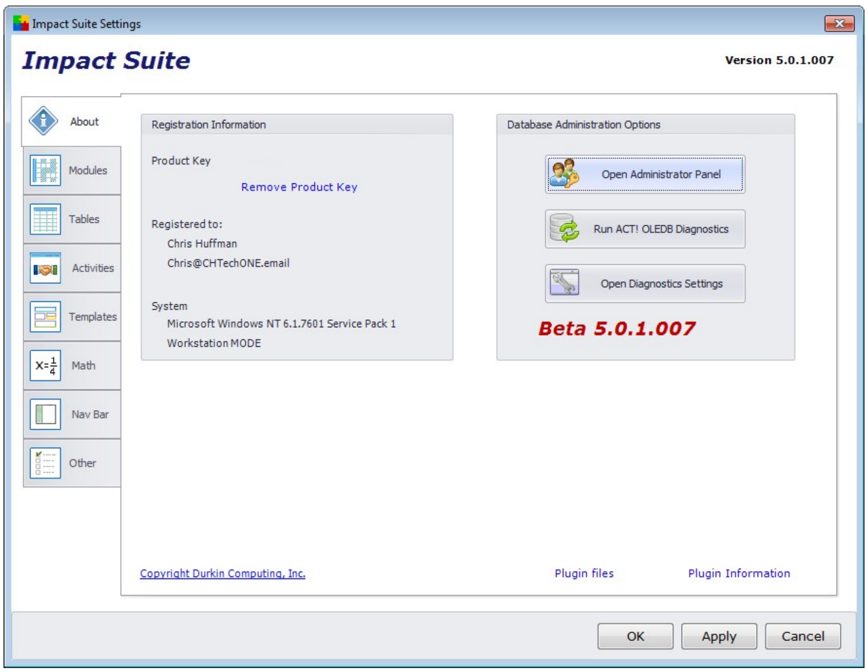
Home > Impact Suite > Settings and Options > Settings > About

About

The About tab will give information about the registered user of the product and allow administrator users of ACT to set what modules are seen by users through the Administrator Panel.
To open the Administrator Panel click the Open Administrator Panel button, to learn more about the Administrator Panel click here.
To open the Administrator Panel click the Run ACT! OLEDB Diagnostics button, to learn more about the click here.
To open the Administrator Panel click the Open Administrator Panel button, to learn more click here.
In the lower right corner is plugin information this will give you information about the Durkin plugins.



See also

Modules
Tables
Activities
Templates
Math
Nav Bar
Other

g+1 0 Tweet

Properties

Article ID: about
Views: 233
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:14 PM

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Home > Impact Suite > Settings and Options > Settings > About > Administrator Panel

Administrator Panel

The Administrator Panel lets you set what users will see what modules.

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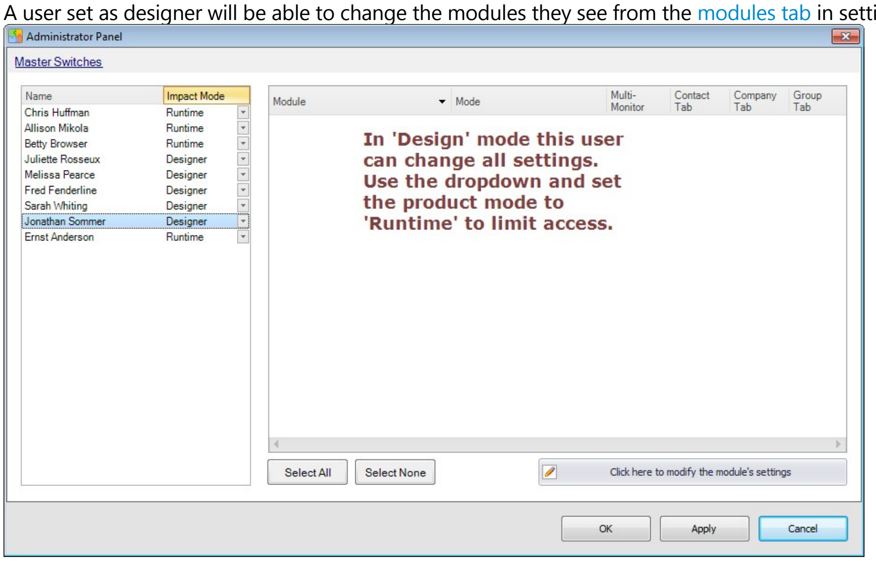
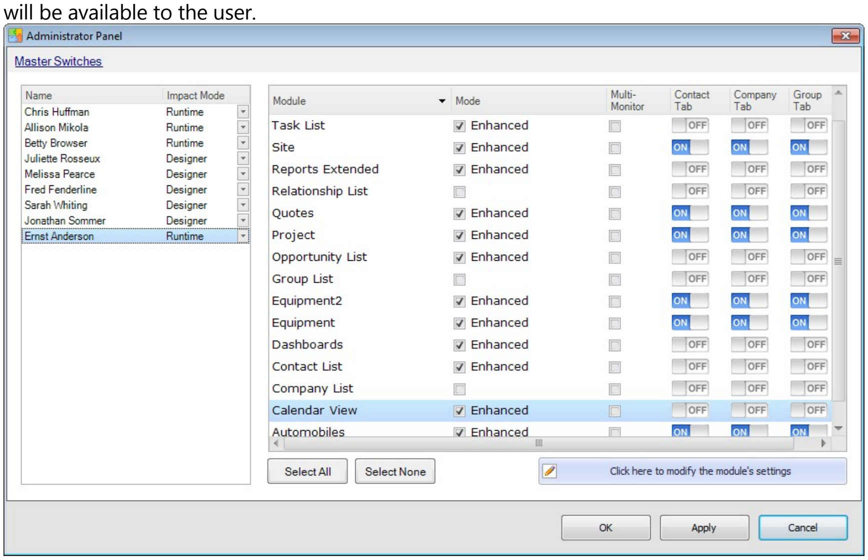
Properties

Article ID: administrator_panel
Views: 208
Created By: jimdurkin

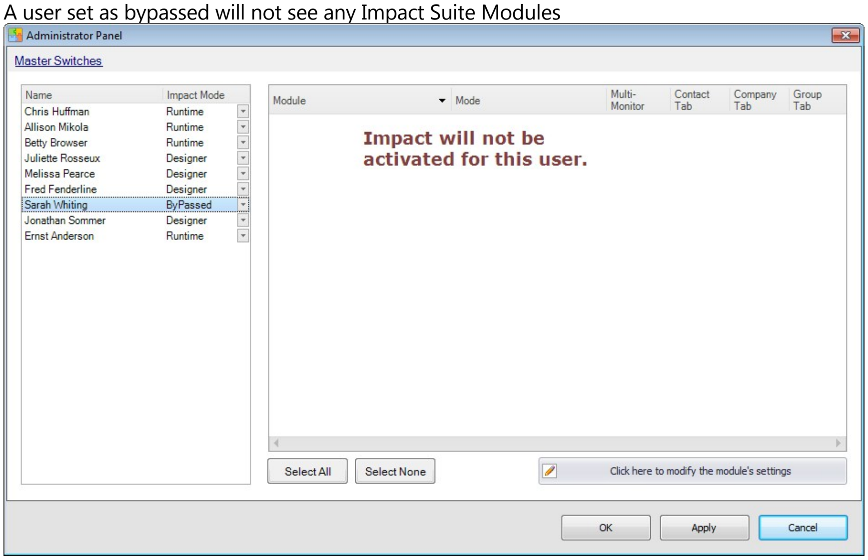
A user set as designer will be able to change the modules they see from the modules tab in settings



A user set as runtime will not be albe to change the modules they see. Only the checked modules on the right will be available to the user.



A user set as bypassed will not see any Impact Suite Modules



Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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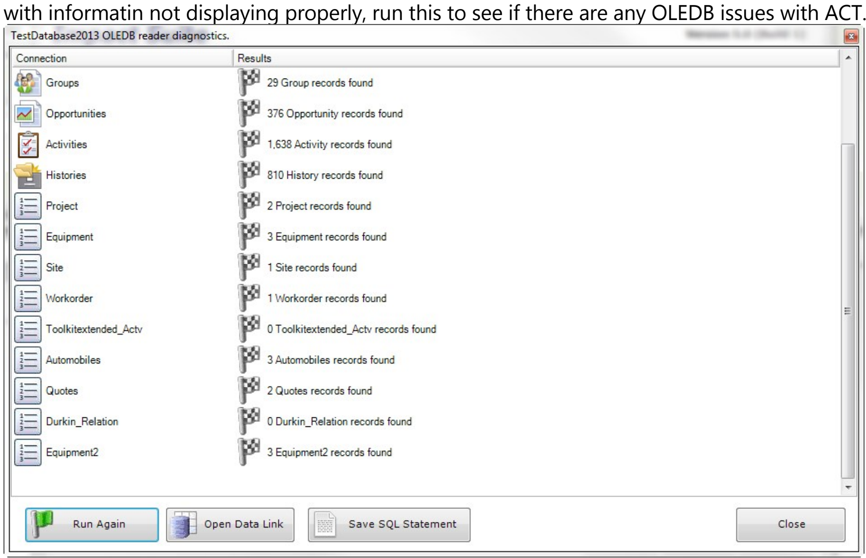
See also

Run OLEDB Diagnostics
Diagnostics Settings

Run OLEDB Diagnostics

The OLEDB Diagnostics will run a series of SQL statements against the ACT database. If you are having issues with informatin not displaying properly, run this to see if there are any OLEDB issues with ACT.



See also

Administrator Panel
Diagnostics Settings

Properties

Article ID: run_oledb_diagnostics
Views: 195
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:14 PM

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Diagnostics Settings

Turning on diagnostics will help the technical support team locate the source of your issues. Many times the issues is a local PC setting which the tech support team can not reproduce in house. If this is the case please follow these steps to turn diagnostics to level three on your local PC.

1. Close ACT!
2. Open the folder "C:\Program Files (x86)\ACT\Act for Windows\Plugins\" folder
3. Launch "Durkin.Common.Diagnostics.v5.exe"
4. Set the Level to three and click OK
5. Restart ACT!

Properties

Article ID: diagnostics_settings
Views: 214
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:14 PM

Actions

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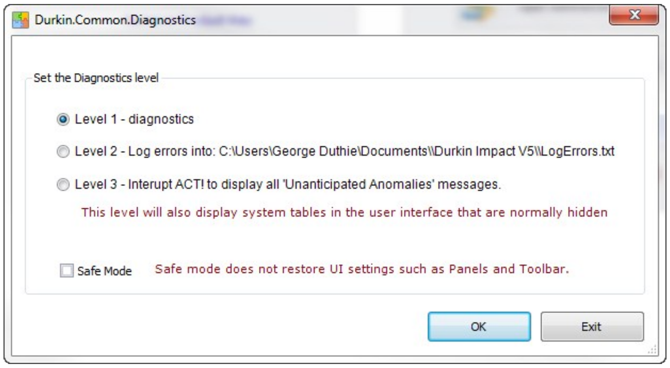
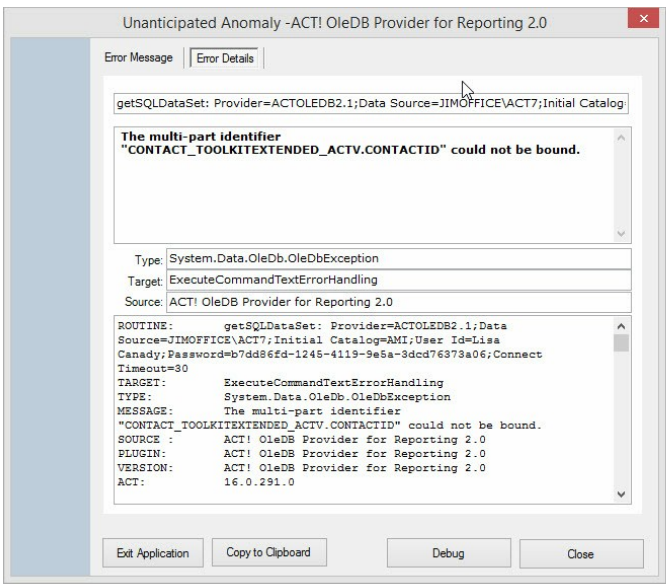


With these diagnostics setting set to level three the diagnostics engine may bring forward a dialog box as shown below. When it does please click on the [Copy to Clipboard] button, open a new email and paste the error text into the email body. Then send the email to Support@durkincomcputing.com



See also

Administrator Panel
Run OLEDB Diagnostics

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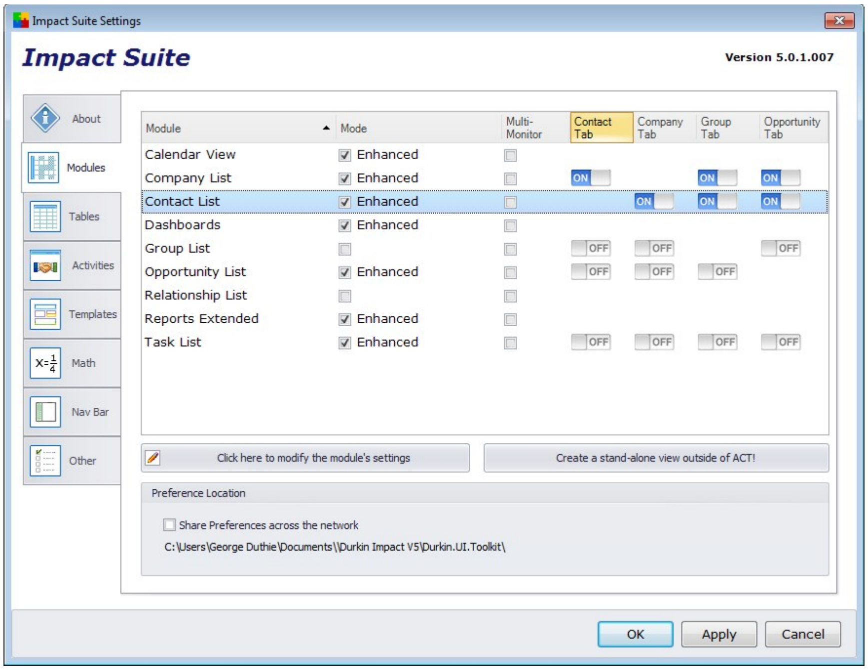
Home > Impact Suite > Settings and Options > Settings > Modules

Modules

The Modules tab lets you turn enhance views and tabs, share network preferences and create a stand alone view outside of ACT.

Properties

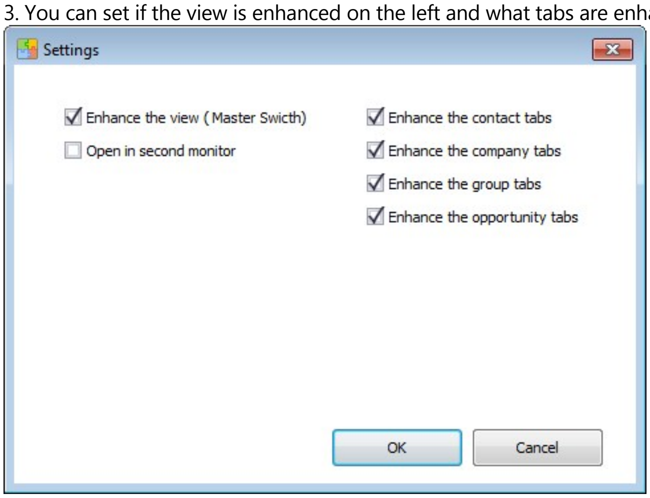
Article ID:	modules
Views:	196
Created By:	jimdurkin



There are two ways to change how the modules are shown.

The first way is
1. Install Impact Suite then launch ACT
2. Go to the TOOLS menu and select IMPACT SUITE
3. Check the mode to enhanced to show this view.
4. Clicking the on/off switch will enhance that view under the tab
5. Clicking the multi-monitor column will show the view in it's own window to move to a separate monitor

The second way is
1. Highlight the module
2. Click the Click here to modify the module's settings button
3. You can set if the view is enhanced on the left and what tabs are enhanced on the right



To create a stand alone view
1. Highlight the module to create the view from
2. Click Create a stand-alone view outside of ACT button
3. Type in a the name of the short cut to create on your desktop

To learn more about the Side View click here.

Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:14 PM

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The shared network preference will share preferences for everyone using database. To turn it on click the Share Preferences across the network checkbox.

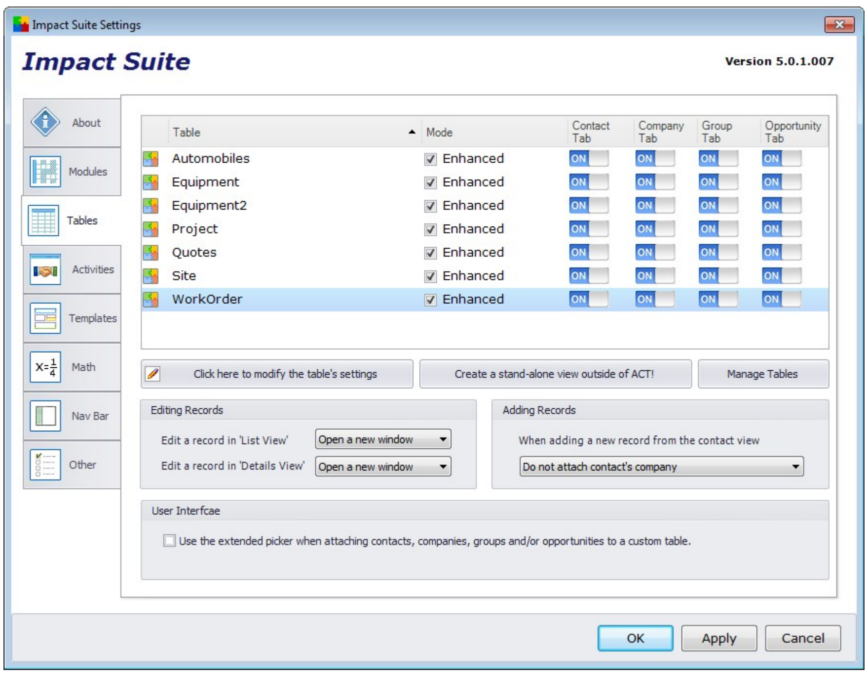
See also

[About](#)
[Tables](#)
[Activities](#)
[Templates](#)
[Math](#)
[Nav Bar](#)
[Other](#)

Home > Impact Suite > Settings and Options > Settings > Tables

Tables

The Tables tab shows the custom tables in the database and lets you turn them on/off, enhance tabs and other settings.



The first way is
1. Install Impact Suite then launch ACT
2. Go to the TOLLS menu and select IMPACT SUITE
3. Change the drop down under Action to ON - enhances this view.
4. Clicking the grey plus signs will enhance that view under the tab

The second way is
1. Highlight the module
2. Click the Click here to modify the module's settings button
3. You can set if the view is enhanced on the left and what tabs are enhanced on the right

Properties

Article ID: tables1
Views: 213
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:14 PM

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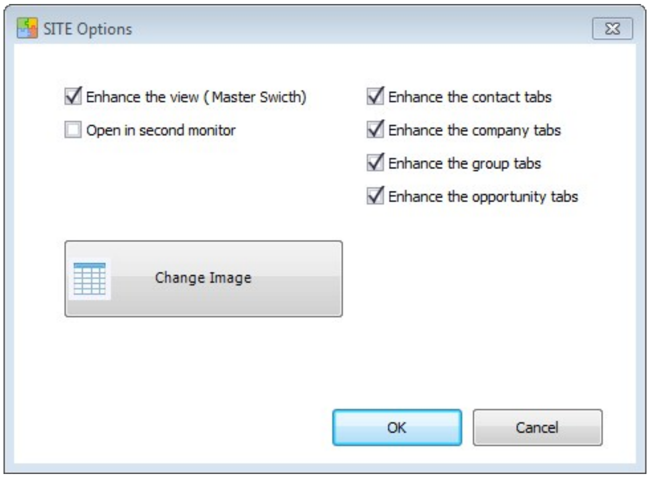

To create a stand alone view
1. Highlight the module to create the view from
2. Click Create a stand-alone view outside of ACT button
3. Type in a the name of the short cut to create on your desktop

To learn more about the Side View click here.

The Manage tables button will bring forward a window to add, edit or delete tables. For more information click here.

The edit a record in 'list view' will bring up the dataentry form in a new window or in the detail view.

The edit a record in 'details view' will bring up the dataentry form in a new window or in the detail view

When adding a new record from the contact view has three options for handling how companies are attached to the new record. Do not attach contact's company which will just have a contact attached, attach only the primary company will add just the primary company, and attach all companies the contact is attached to which attachs all the contacts companies.

Use the extended picker when attaching contacts, companies, groups, and/or opportunities to a custom table will bring forward a more robust contacts, companies, groups, or opportunities selector.

See also

About
Modules
Activities
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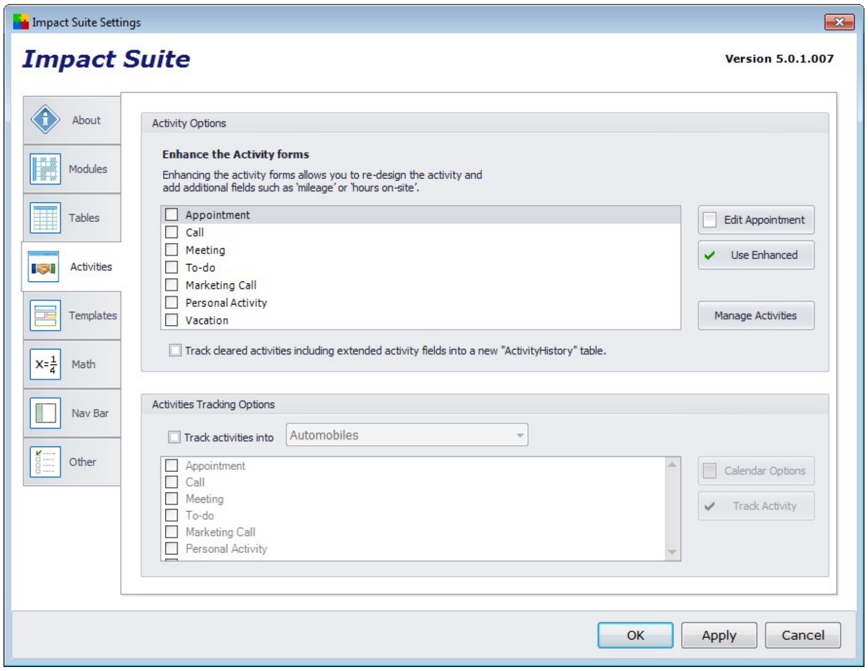
Other

Activities

The Activities tab allows custom activity forms to be designed and used instead of ACT activity forms.



To set an activity to use a custom form
1. Highlight the activity type
2. Click the Use Enhanced button

To design and activity form
1. Highlight the activity type
2. Click the Edit [activity type] button
3. Design the form. For more information on the form designer go here.

The Manage Activities button will bring forward ACT's Manage Activity Types screen.

Checking the Track cleared activities... will record each time an activity is cleared into a custom table called ActivityHistory

Checking Activities Tracking Options will intergrate the activities into the choosen custom table.

See also

About
Modules
Tables
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Math
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Other

Properties

Article ID: activities1
Views: 232
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:14 PM

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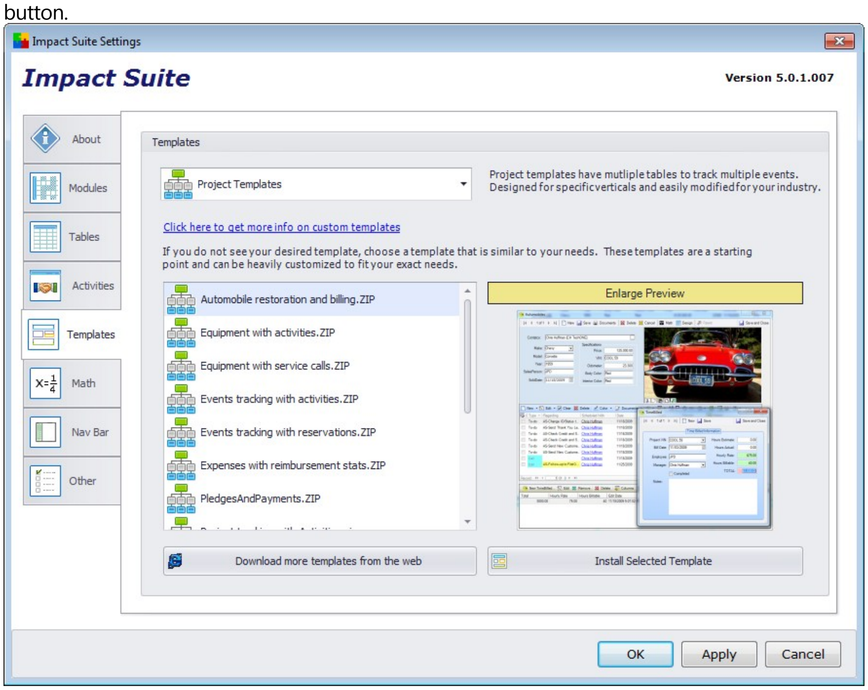
Templates

The Templates tab will set up a link to allow you to add tables, reports, charts, pivots and modules to your ACT database. You pick the catagory from the drop down, select the item to install and click install selected [item] button.



To add a template (aka custom table) please follow these steps:

1. Go to the TOOLS menu and select IMPACT...
2. From this ABOUT form please select the TEMAPLTES tab on the left side.
3. Using the dropdown box at the top please select PROJECT TEMPLATES
4. From the template list please highlight your desired template.
   (You can review the templates by clicking on the "Enlarge Preview")
5. Click on the [Install Selected Template] when you are ready.

   You will be presented by a progress bar, sometimes multiple progress bars depending on the template.
   Once the template installation is completed you will be presented with a conformation dialog box.
6. Click OK to close the dialog.

You now have installed custom tables from our base templates. You can modify the tables and or data entry form.
Please check out these help topics:

Custom Tables

See also

About
Modules
Tables
Activities
Math
Nav Bar
Other

Properties

Article ID: projects1
Views: 218
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:14 PM

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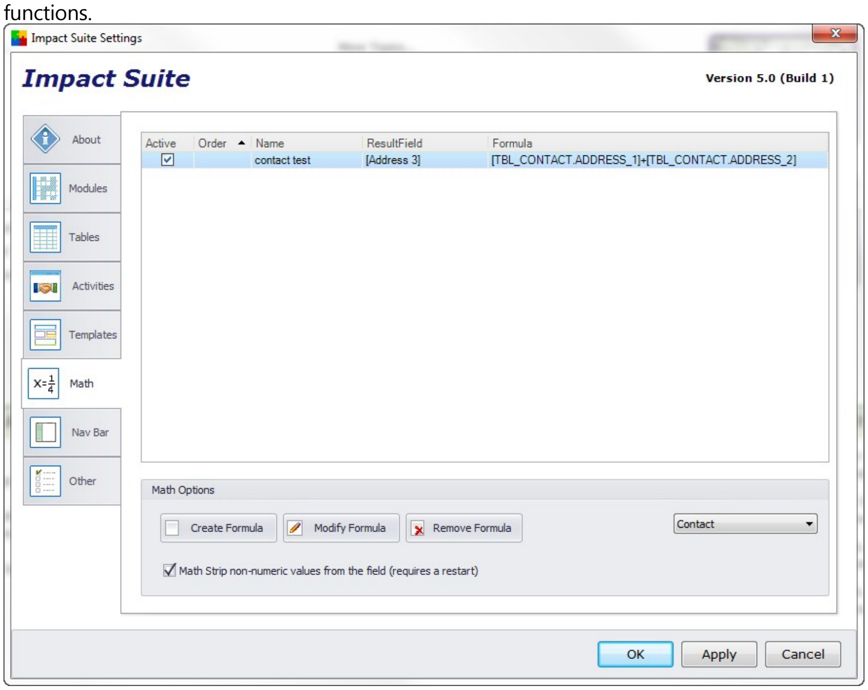
Math

The Math tab displays a list the math functions. This screen will let you add, edit and delete contact math functions.



To create a math function click the new button, and go here for information on editing the math formula.

To edit a math function highlight the math function, click the modify formula button and go here for information on editing the math formula.

Delete a math function highlight the math function and click the remove formulabutton

The formula color button will change the background colors for the resulting fields and the fields in the formula for all the math forumula's

The drop down will display math formula's for the selected table

Math Strip non-numerics from the field will remove all non-numeric characters from the **all math formula's** when checked. For example '[address 1] * 5' would be '89 Florence drive * 5' which would cause an error, with this option checked it would be '89 * 5'.

See also

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g+1 0 Tweet

Properties

Article ID: math
Views: 187
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:14 PM

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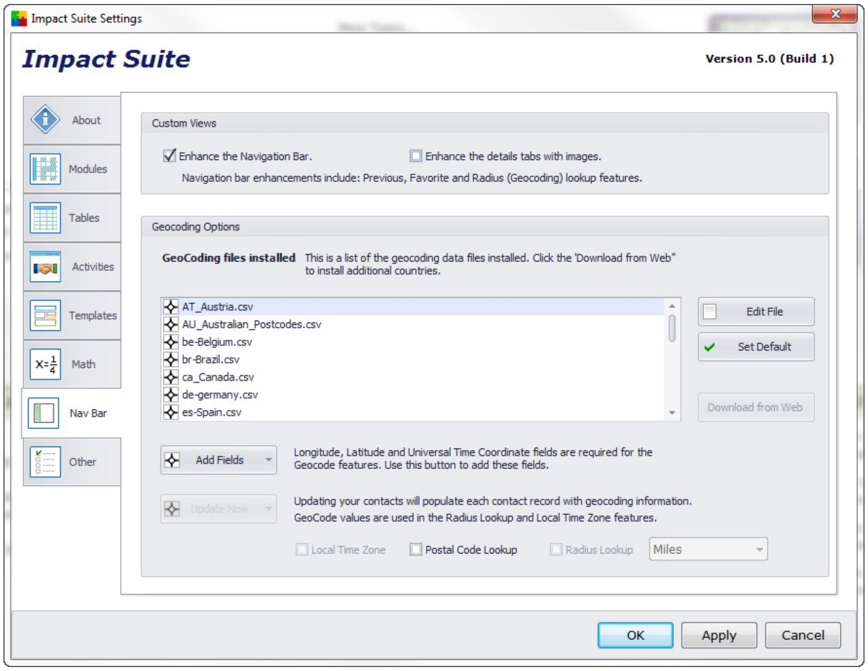
Nav Bar

The Nav Bar tab handles how the Durkin Navbar looks.



Enhance the Navigation Bar when checked will replace the ACT Navbar with the Durkin Navbar.
Enhance the details tabs with images when checked will add images to the ACT entity detail view tabs.

Geocoding Options
The Edit File button will allow the file to be edited
The Set Default button will set the selected file as the default file to be used for geocoding
The Download from Web button will download new files and updates from DurkinComputing.com
The Add Fields button will add the necessary fields to the current ACT database that are needed for geocoding.
When the fields are installed the button will become greyed out.
The Update Now button will update all the contacts in the database with information from the geocode files.
The Local Time Zone, Postal Code Lookup & Radius Lookup options are how the Radius will work, the drop down will set miles or kilometers

See also

About
Modules
Tables
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Templates
Math
Other

Properties

Article ID: nav_bar
Views: 209
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:15 PM

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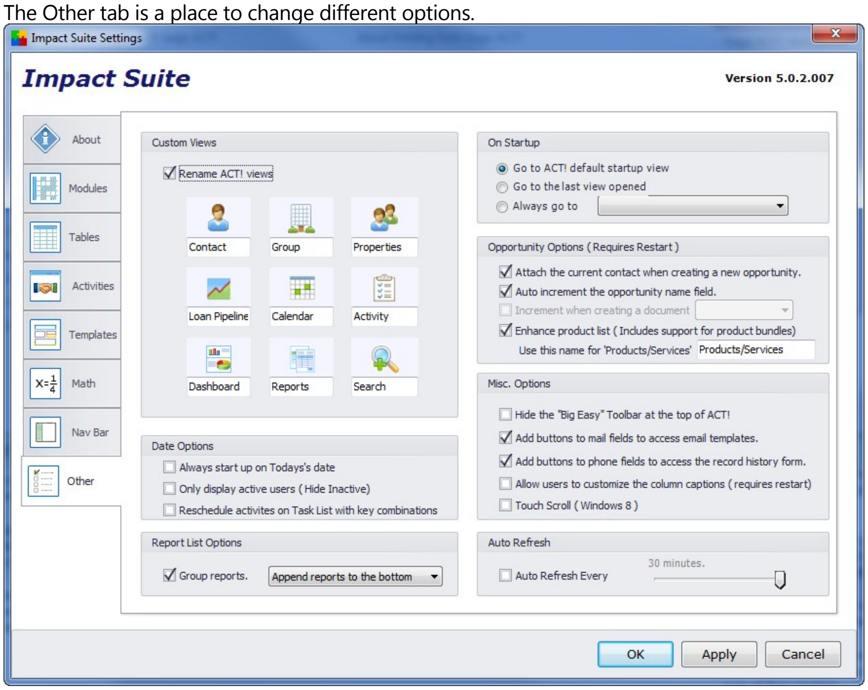
Other

The Other tab is a place to change different options.



Custom Views
When "Rename Act views" is checked the nine views can be renamed thoughout ACT.

Date Options
Always start up on today's date will start on today's date when checked, when unchecked it will start on the last selected range.
Only display active users will only show active users in the Scheduled For panel.
Reschedule activities on Task List with key combinations will let you select a single activity or multiple activities and reschedule them for the future.

Ctrl + 1 = 1 Day
Ctrl + 2 = 2 Days
Ctrl + 3 = 3 Days
Ctrl + 4 = 1 Week
Ctrl + 5 = 2 Weeks
Ctrl + 6 = 3 Weeks
Ctrl + 7 = 1 Month
Ctrl + 8 = 2 Months
Ctrl + 9 = 3 Months
Ctrl + 0 = 1 Year

Report List Options
Group Reports will group the Durkin reports by category
The drop down will change how the Durkin reports are shown Append reports to the bottom of the report veiw will show both the Durkin and ACT reports, Replace the native reports view will just show the Durkin reports.

On Start up
Will set what page ACT starts on the default, last viewed or select one from the drop down.

Opportunity Options
Attach the current contact when creating a new opportunity will when checked attach the current contact on a new opportunity.
Auto increment the opportunity name field will when checked take the previous opportunity name and numerically increment it.
Enhance product list when checked will enhance the Opportunities product tab, give a custom product entry screen and allow for

Properties

Article ID:	other
Views:	229
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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custom math formula's to be applied to a product. For more information go here.

Misc. Options
Hide the "Big Easy" toolbar at the top of ACT will hide the toolbar from view
Add button next to all email fields to access email templates will put a drop down control next to the field that gives access to email templates. Read More
Add button next to all phone fields to access the phone will put a drop down control next to the field that brings up the phone dial.
Allow users to customize the columns captions will not allow Act users to change the column captions
Touch Scroll (Windows 8) will make the scroll bars larger for fingers and also effect scrolling.

Auto Refresh
Checking Auto Refresh every will refresh all the Durkin views for the amount of time set.

See also

About
Modules
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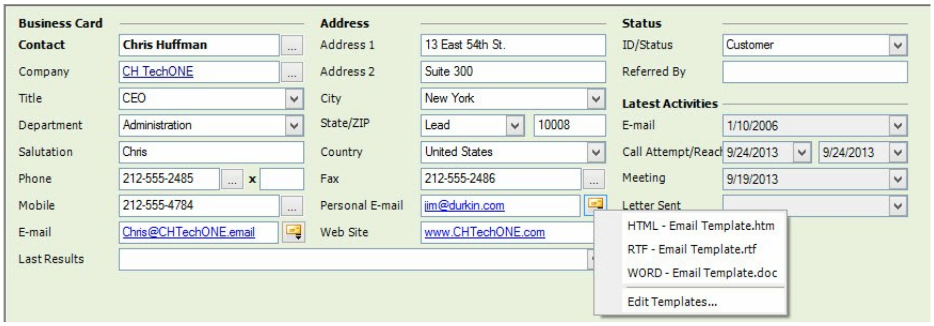
Nav Bar

Email Templates

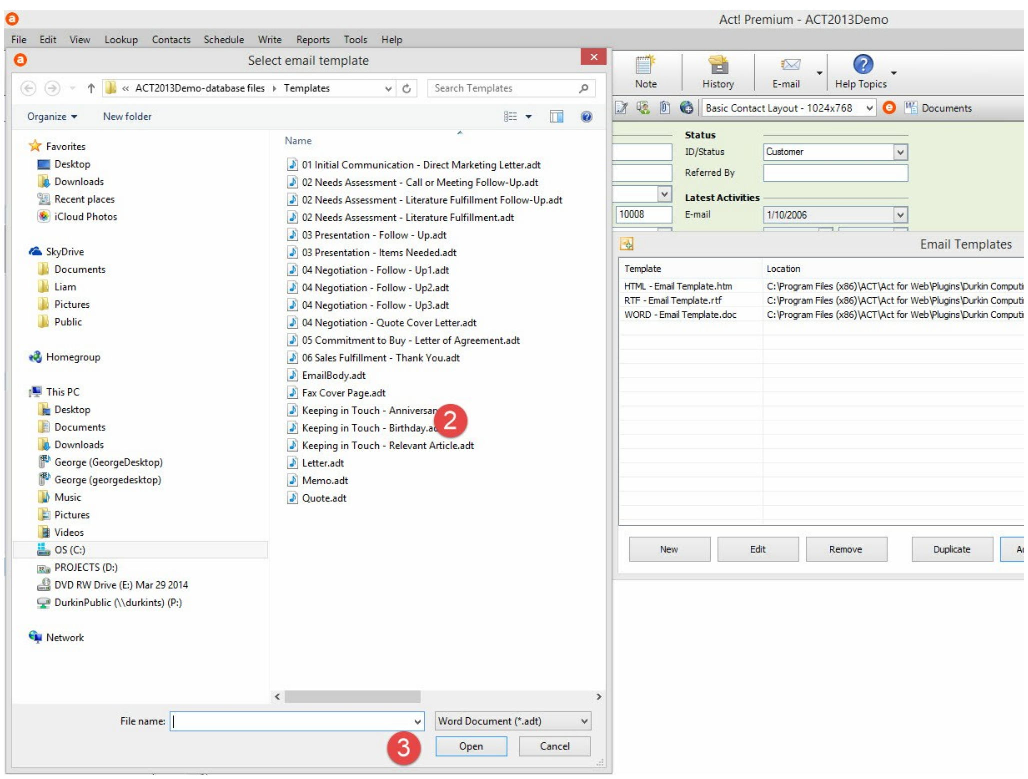
By turning on the option "Add buttons to email fields to access email templates" Impact will add a new icon next to each email field in the details view.

This button allows the user to select from a list of email templates. Below is the popup menu when the button is clicked.



To edit the popup menu to include you favorite email templates click on the **Edit Templates** menu and follow these steps:

1. Click on the **Add Existing to the Drop Down**
2. Select your template from the open dialog
3. Click the Open button (ass seen below)



Tweet

Properties

Article ID:	email_templates
Views:	197
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	4/9/2014 8:45 PM
Last Modified:	4/9/2014 8:54 PM

Actions

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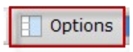
Options

The Options button in the toolbar will bring up a window that can change list options, show a pivot table, show a chart and more.



See also

Settings
Options - Calendar
Calendar - Fields
Calendar - Color Rules

8+1 0 Tweet

Properties

Article ID: options
Views: 206
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:15 PM

Actions

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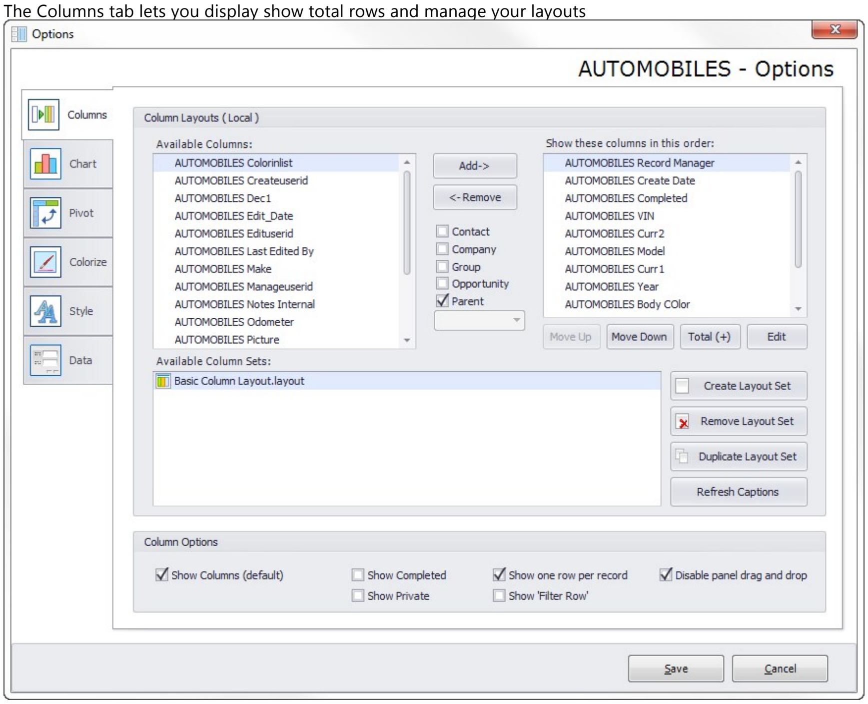
Columns

The Columns tab lets you display show total rows and manage your layouts



Create a new layout
1. Click the Create Layout button
2. Enter the name
3. Click the Save button

Edit a layout
1. Highlight the layout to edit
2. Move columns from/to the available columns/show these columns in this order lists
To add columns from a parent or ACT entity check the check boxes between the lists.

Remove a layout
1. Highlight the layout to edit

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Properties

Article ID: columns
Views: 203
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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2. Click the Remove Layout button

Duplicate a layout
1. Highlight the layout to edit
2. Click the Duplicate Layout button

The Refresh Captions button will sync up the column names with the ACT fields

Clicking Contact, Company, Group, Opportunity and Parent will allow fields from those tables to be added to the layouts.

Show Columns when unchecked will hide the list view for the custom table.
Show Completed will show entries that have been marked completed
Show Private will show entries that are private
Show one row per record will combine a record that is attached to multiple ACT entities into one row
Show 'Filter Row' will show the filter row above the list to filter each column
Disable panel drag and drop when checked will now allow the column headers to be dragged off the view to remove them.

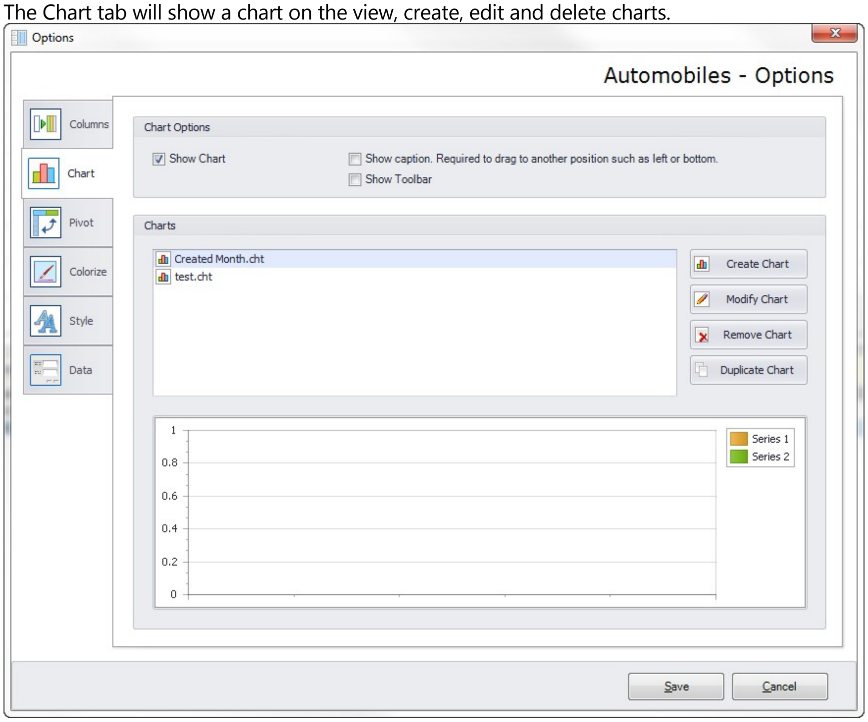
See also

Chart
Pivot
Colorize
Style
Data

Home > Impact Suite > Settings and Options > Options > Chart

Chart

The Chart tab will show a chart on the view, create, edit and delete charts.



Show Chart will make the chart visible.
Show Caption will put a bar at the top of the chart that will make it draggable
Show Toolbar will make the chart toolbar visible.

Create a new chart
1. Click the Create Create button

Properties

Article ID: chart1
Views: 192
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:15 PM

Actions

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2. Enter the name
3. Click the Save button

Edit a chart
1. Highlight the layout to edit
2. Click the Modify Chart button
3. That will bring the edit window, for more information go here

Remove a chart
1. Highlight the layout to edit
2. Click the Remove Chart button

Duplicate a chart
1. Highlight the layout to edit
2. Click the Duplicate Chart button

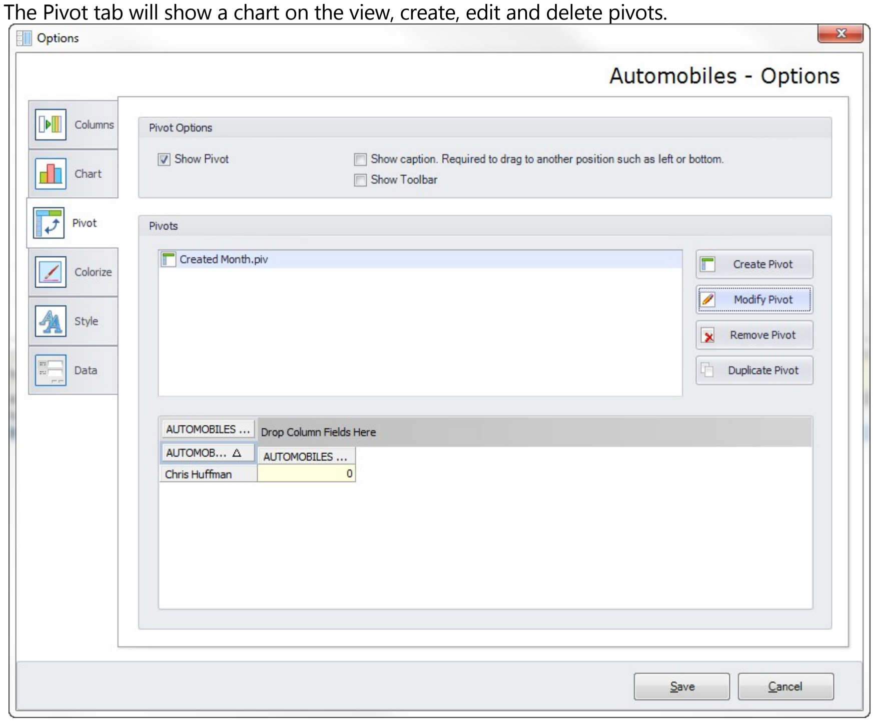
The bottom panel will show what the selected chart will look like.

See also

Columns
Pivot
Colorize
Style
Data

Pivot

The Pivot tab will show a chart on the view, create, edit and delete pivots.



Properties

Article ID: pivot
Views: 204
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:15 PM

Actions

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Show Chart will make the chart visible.
Show Caption will put a bar at the top of the chart that will make it draggable
Show Toolbar will make the chart toolbar visible.

Create a new chart
1. Click the Create Create button
2. Enter the name
3. Click the Save button

Edit a chart
1. Highlight the layout to edit
2. Click the Modify Chart button
3. That will bring the edit window, for more information go here

Remove a chart
1. Highlight the layout to edit
2. Click the Remove Chart button

Duplicate a chart
1. Highlight the layout to edit
2. Click the Duplicate Chart button

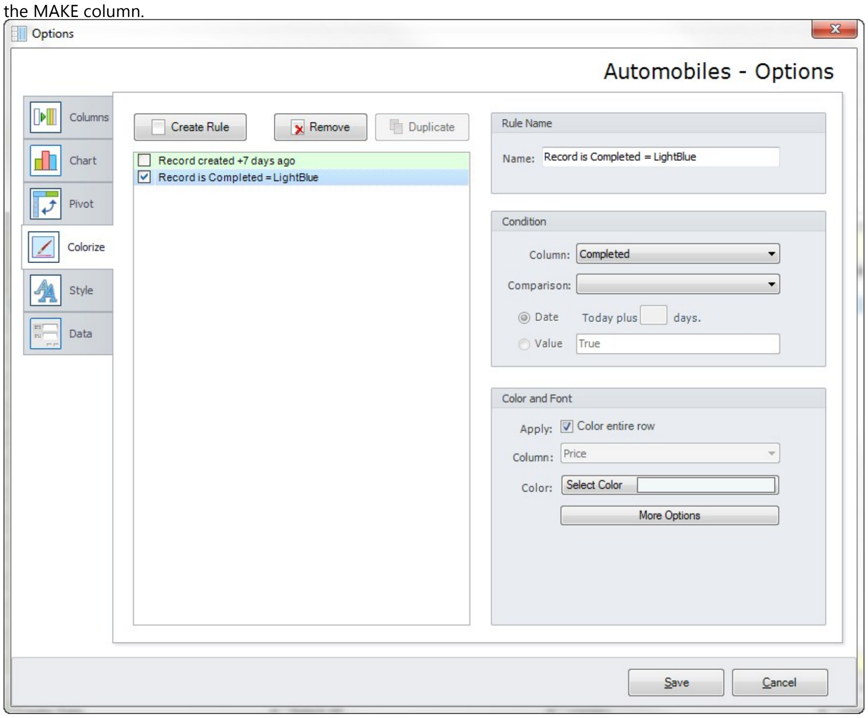
The bottom panel will show what the selected chart will look like.

See also

Columns
Chart
Colorize
Style
Data

Colorize

The Colorize tab sets the color rules. Color rules are designed to colorize records for rows that match a condition. Color rules can be based on text condition like the one below. In this color rule we are making all rows blue where the word "Triumph" apears in the MAKE column.



New Color Rule
1. Click the Create Rule button to insert a new untitled color rule
2. Give the rule a unique name
3. Set what column the condition will match against and the type of comparison
4. Select the date or value the column should match against
5. If you want the whole row to be colored check the aplly color entire row, if not uncheck it and select the column that will be colored
6. Select the color of the rule
7. Clicking more options will give options for style, gradient and font

Delete Color Rule
1. Highlight the rule
2. Click the Remove button

Copy Color Rule
1. Highlight the rule
2. Click the Duplicate button

To learn more on how color rules are created click here.

See also

Columns
Chart
Pivot
Style
Data

Properties

Article ID: colorize
Views: 220
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:16 PM

Actions

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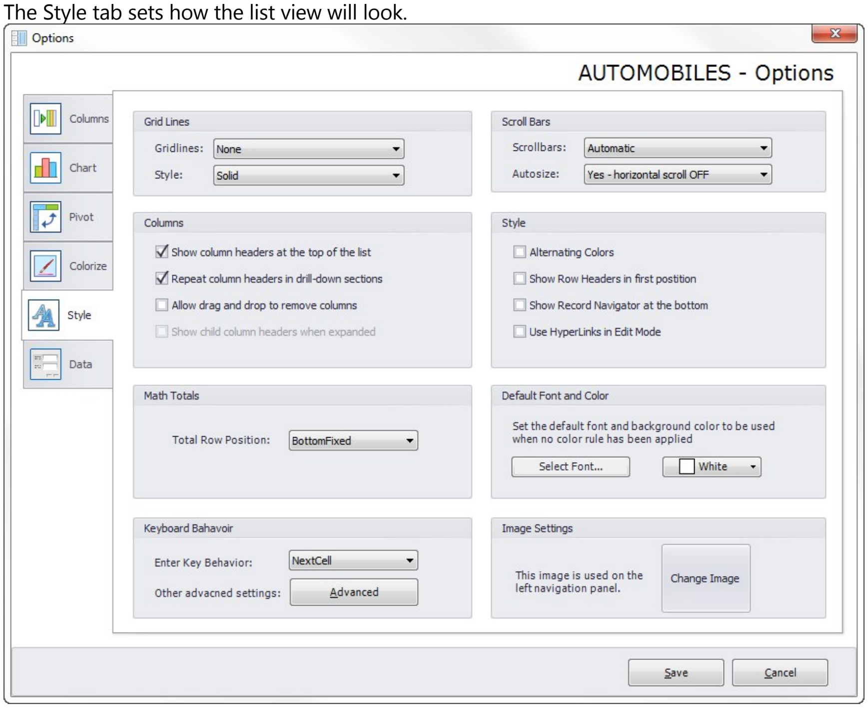
Style

The Style tab sets how the list view will look.



Grid Lines
Grid Lines will show default, horizontal, vertical, horizontal & vertical or none.
Style will set the type of line solid, smalldots or default.

Scroll bars
Scrollbars sets when scroll bars will show up none, auto, horizonal, vertical or both.
Autosize sets if the columns will fit on the screen or not by default.

Columns
Show column headers at the top of the list when checked will show the column headers.
Repeat column headers in drill-down sections when checked will show the column headers for the child tables each time they appear. Currently disabled in the product.
Allow drag and drop to remove columns when checked you can drag the column header off of the grid to remove it from the layout set.
Show child column headers when expanded when checked will show the column headers for the child tables each time they appear. Currently disabled in the product.

Style
Alternating colors when checked will color every other row in the grid.
Show row headers in first position when checked will show a row header in to the left of the row.
Show record navigator at the bottom when checked will display the number of records and the currently selected one.
Use hyperlinks in edit mode when checked, will keep hyperlink columns displaying hyperlinks even in edit mode.

Math Totals
Total Row Position sets if the total row is always at the bottom or if it

Default Font and Color
Select Font button will open a window to set the font attributes. The font type, size, style and more can be set.

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Properties

Article ID: style
Views: 200
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:16 PM

Actions

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Color button will set the font color.

Keyboard Behavior
Enter key behavior when the enter key is pressed the next cell is selected, next row is selected or nothing will happen.
Other advanced settings brings a window forward to set more advanced settings for how the row is displayed.

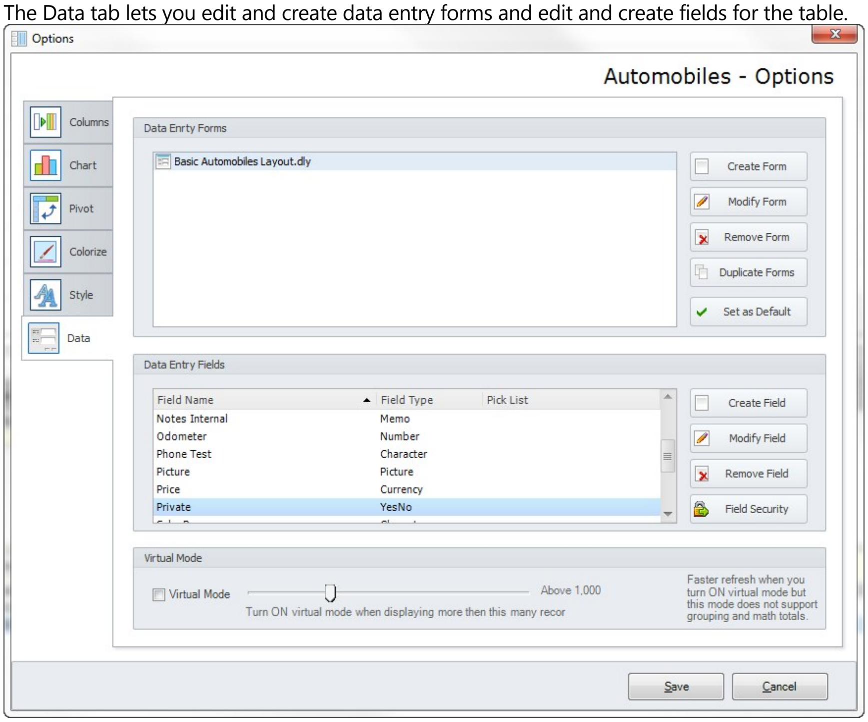
Image Settings
Change image lets you select a new image to be shown in the navigation bar.

See also

Columns
Chart
Pivot
Colorize
Data

Data

The Data tab lets you edit and create data entry forms and edit and create fields for the table.



Data Entry Forms
The Create Form button will create a a new data entry out. It will ask for the form name and then create it.
The Modify Form button will open the selected form in the designer to make changes. For more information on the designer click here.
The Remove Form button will delete the selected form.
The Duplicate Form button will make a copy of the selected form.
The Set as Default button will make the selected form the form that opens when a record is entered or edited.

Data Entry Fields
The Create Field button will create a new field. For more information click here.
The Modify Field button will edit a field. For more information click here.
The Remove Field button will delete a field. For more information click here.
The Field Security button will set permission to edit or view the field. For more information click here.

See also

Columns
Chart
Pivot
Colorize
Style

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Properties

Article ID: data
Views: 186
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:16 PM

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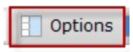
Options - Calendar

The Options button in the toolbar will bring up a window that can change how the calendar displays, the amount of columns and more.



Schedule   Side-by-side Columns   TimeLine   General   Holidays   Style

Project

See also

Settings
Options
Calendar - Fields
Calendar - Color Rules

Properties

Article ID: options_-_calendar
Views: 237
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:16 PM

Actions

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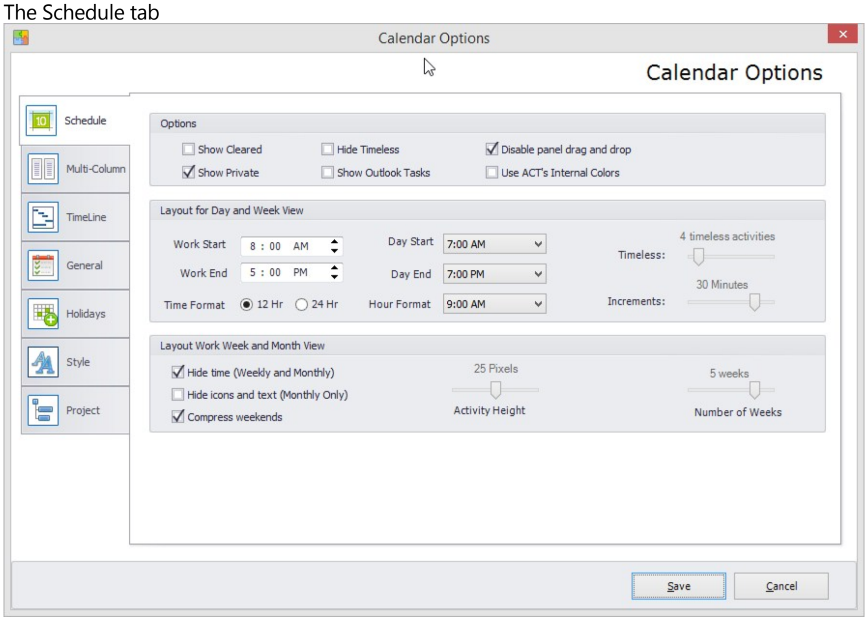
Schedule

The Schedule tab



Layout for Day and Week View
Work Start wil set when the work day begins.

Properties

Article ID: schedule
Views: 212
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:17 PM

Actions

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Work End will set when the work day ends.
Time Format show time in 12 hour format or 24 hour format.
Day Start will set what time the day starts, must be in one hour increments.
Day End will set what time the day ends, must be in one hour increments.
Hour Format is how the hour is displayed
Timeless will set how many timeless activites to show at once
Increments will set how much each hour is broken down on the calendar, increments range from 5 minutes to 60 minutes.

Layout Work Week and Month View
Hide Time (weekly and monthly) when checked will hide the time from the weekly and monthly calendars.
Hide icons and text (weekly and monthly) when checked will just display the activities and not text or icons in the activities.
Compress weekends when checked will not show Saturday or Sunday.
Activity height will set the height of activities.
Number of weeks will set the number of weeks shown on the calendar.

Fonts
Daily, Weekly, Work Week and Monthly views each have either own ..., when checked each monthly view can have it's own font settings.
Screen Fonts will set the font settings for Day/week, weekly, month and day view.
Printer Fonts will set the font settings for Day, week, month and date.

See also

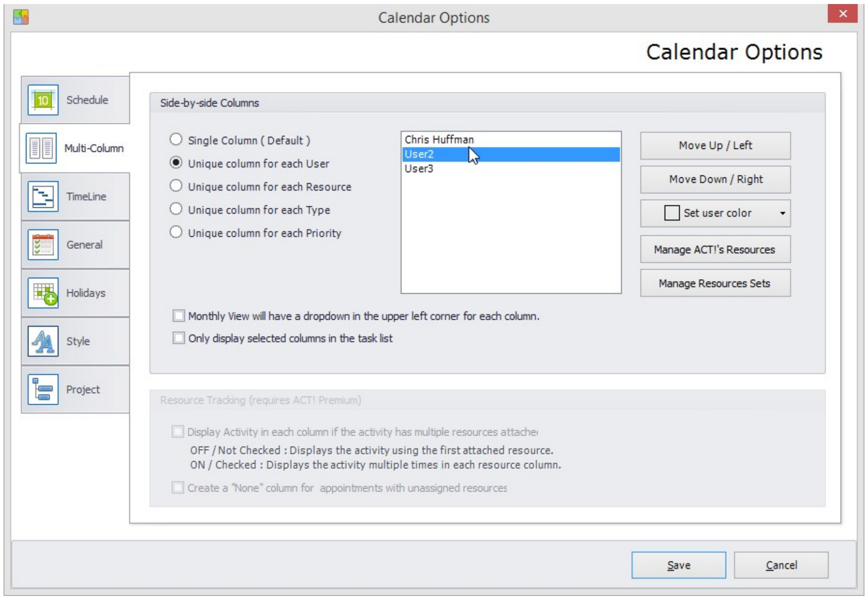
Side-by-side Columns
TimeLine
General
Holidays
Style
Project

Side-by-side Columns

Properties

Article ID: side-by-side
Views: 324

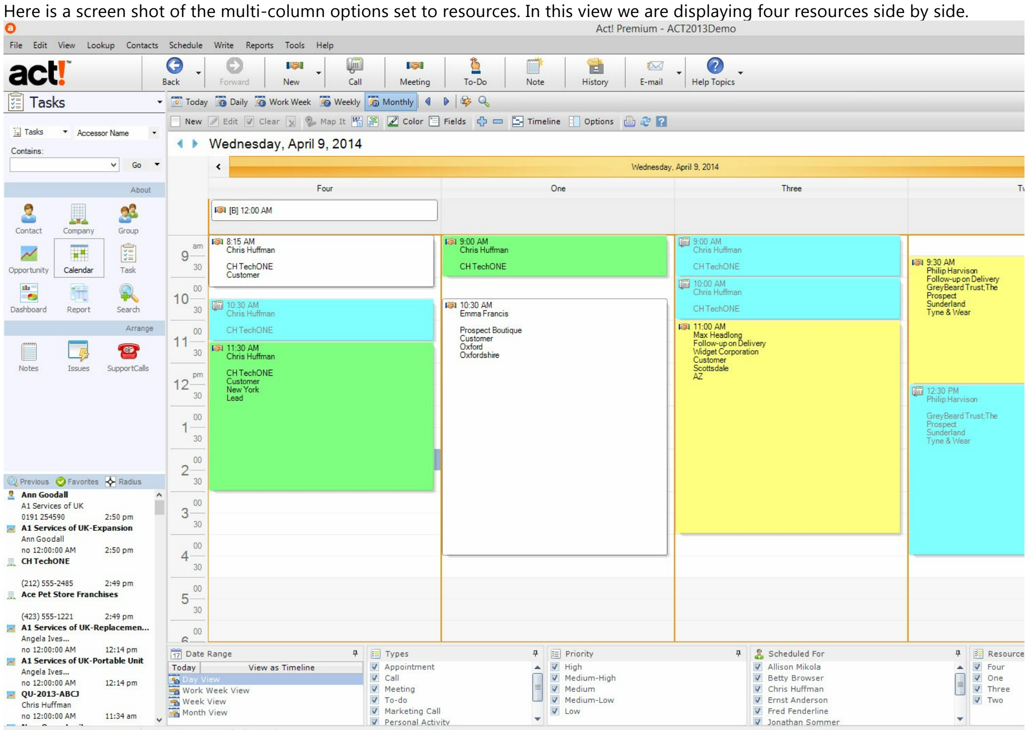
The Multi-Column tab will change how the daily calendar is shown



Side-by-side Columns
Single column will display a single column like ACT.
Unique column for each user will make a column for each user, users can be reordered or colored.
Unique column for each resource will make a column for each resource, resources can be reordered or colored.
Unique column for each type will make a column for each activity type, types can be reordered or colored.
Unique column for each priority will make a column for each activity priority, priorities can be reordered or colored.

Resource Tracking (requires ACT Premium) is only enabled when unique column for each resource is selected
Display activity in each column... when checked will place the activity in the resource column depending on the first attached resource, when not checked it will display in resource column for each attached resource.
Create a "None" column for appointments with unassigned resources when checked will place any activity without resources in a none column.

Here is a screen shot of the multi-column options set to resources. In this view we are displaying four resources side by side.



See also

Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 9/9/2014 1:17 PM

Actions

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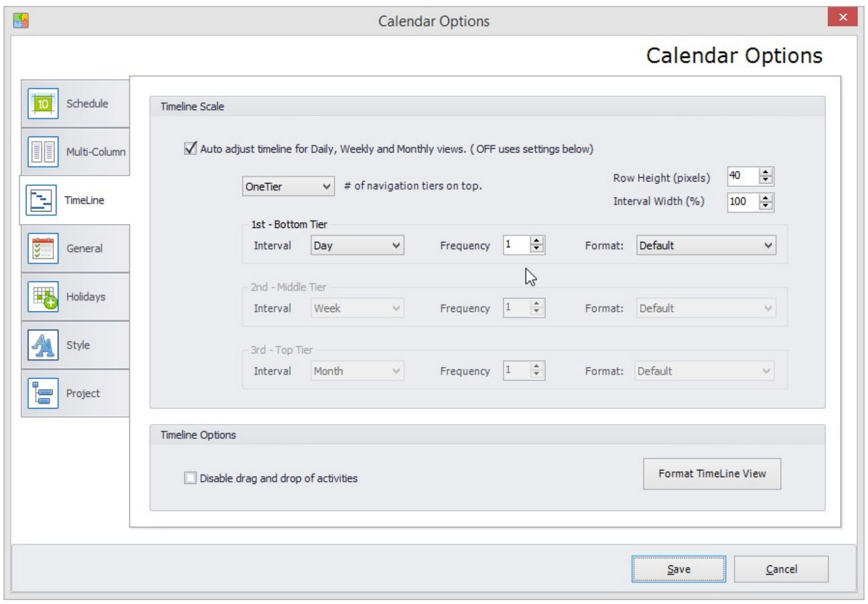
TimeLine

The Timeline tab will set how the calendar looks in timeline mode.



TimelineScale
Auto adjust timeline for ... when checked will use the default settings if it is unchecked then it will use the settings below it.
# of navigation tiers on top will display how many time displays to show on the top of the timeline
Interval can be set from second to year.
Frequecny is how often an activity is shown.
Format is how the date is displayed

Timeline Options
Disabe drag and drop of activities when checked will not allow the user to drag activities to change their date and time.

See also

Schedule
Side-by-side Columns
General
Holidays
Style
Project

Properties

Article ID: timeline
Views: 206
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:19 PM

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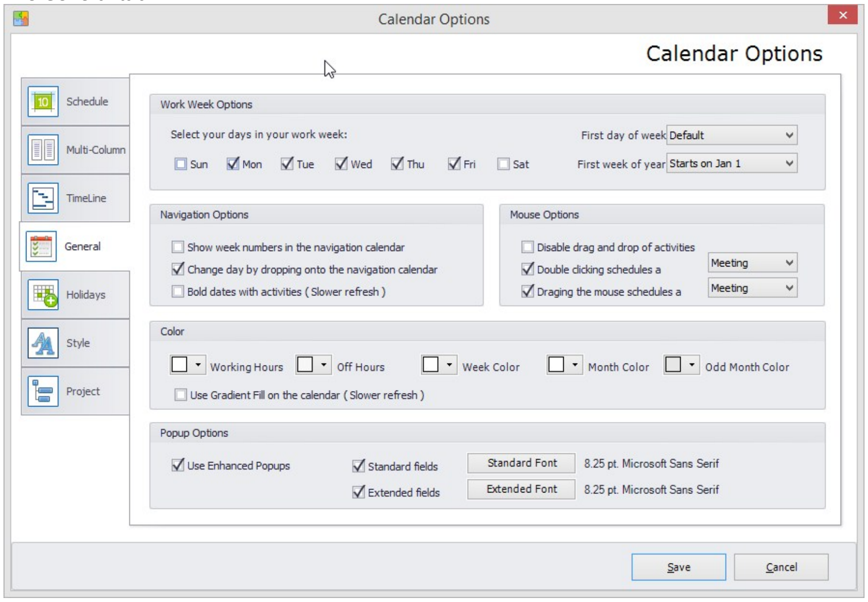
General

The General tab



Work Week Options
Select your days in your work week will set the days that show up in your work week calendar.
First day of the week will set what the first day of the week is displayed default will take ACT's default or you can choose the day.
First week of the year will set when the new year starts, you can choose Jan1, first 4-day week or first full week.

Navigation Options
Show week numbers in the navigation calendar when checked will show the week number next to the week in the smaller navigation calendar that is by default to the right of the calendar.
Change day by dropping onto the navigation calendar when checked will change the current calendar day(s) by clicking on the day(s) in the navigation calendar.
Bold dates with activities when checked will bold dates int the navigation calendar that have activities.

Mouse Options
Disable drag and drop of activites when checked will not allow activities to be changed by dragging them to a new position.
Double clicking schedules a ... when checked will set what type of activity is created when you drag the mouse on the calendar.
Dragging the mouse schedules a... when checked will set what type of activity is created when you drag the mouse on the calendar.

Color
Working hours will set the background for work hours in the daily view.
Off hours will set the background for off hours in the daily view.
Week Color will set the background for work hours in the weekly view.
Month Color will set the background for the current month in the monthly view.
Odd Month Color will set the background for the next or previous month in the monthly view.

Popup Options
Use Enhanced Popups when checked will bring a popup the activity when the mouse is hovering over it.
Standard fields when checked will show the standard activity fields. The font button will change the font settings.
Extended fields when checked will show the Durkin extended activity fields. The font button will change the font settings.

See also

Properties

Article ID: general
Views: 201
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:19 PM

Actions

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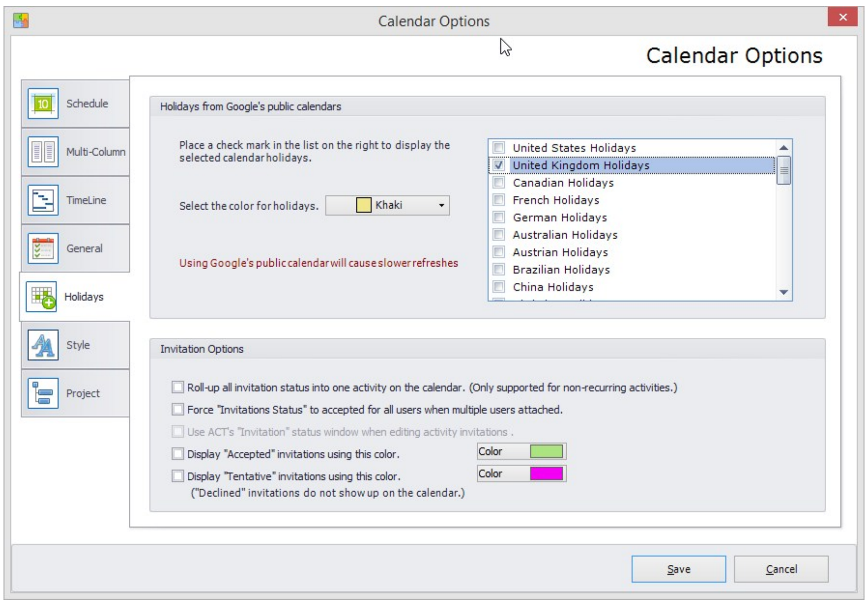
Schedule
Side-by-side Columns
TimeLine
Holidays
Style
Project

Home > Impact Suite > Settings and Options > Options - Calendar > Holidays

Holidays

The Holidays tab displays sets of country holidays on the map and how invitations are handled.



To display a set of holidays on the calendar put a check box next to the countries to display and select the color to display the holidays

Invitation Options
Roll-up invitation status into one activity, when checked will display all the statuses on one activity
Force "Invitations Status" to accepted for all users when multiple users are attached, when checked will mark ACT users as accepted to invitations
User ACT's "Invitation" status window when editing activity inviatations when checked will use the default ACT screen.
Display "Accepted" invitations using this color, select color to show with accepted invitations.
Display "Tentative" invitations using this color, select color to show with tentative invitations.

See also

Schedule
Side-by-side Columns
TimeLine
General
Style
Project

Properties

Article ID: holidays1
Views: 186
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:20 PM

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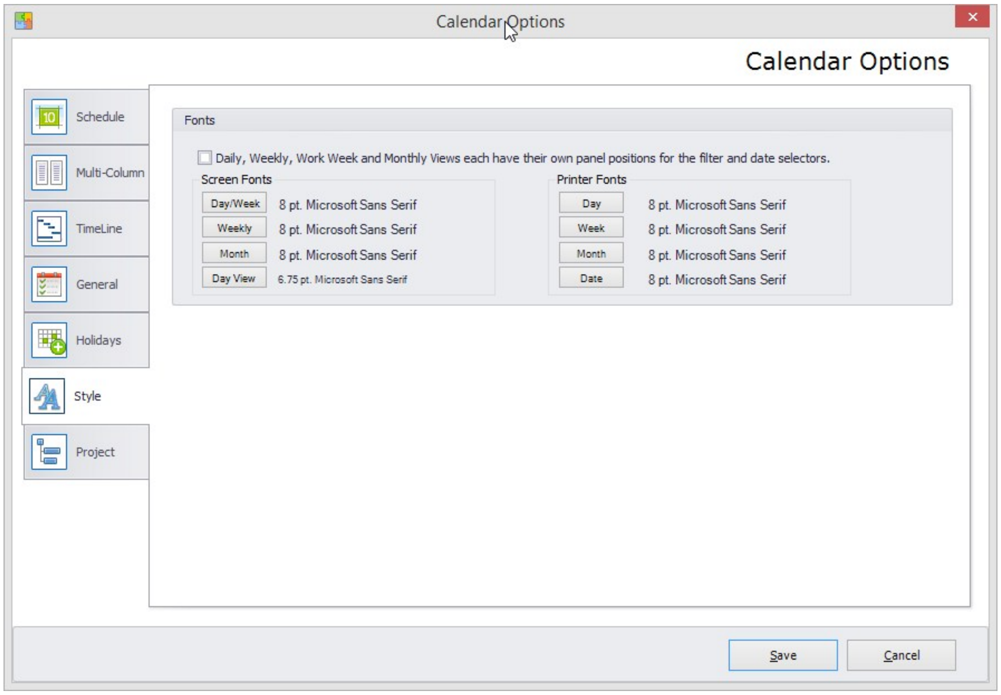
Home > Impact Suite > Settings and Options > Options - Calendar > Style

Style



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Properties

Article ID: style1
Views: 218
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 1:20 PM
Last Modified: 3/24/2014 1:25 PM

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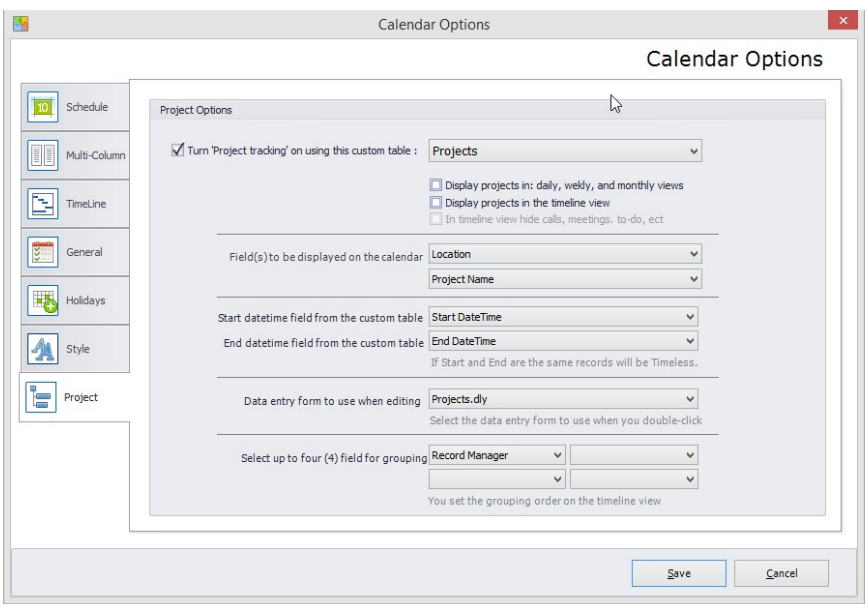
Home > Impact Suite > Settings and Options > Options - Calendar > Project

Project



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Properties

Article ID: project
Views: 211
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 1:22 PM
Last Modified: 3/24/2014 1:23 PM

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Home > Impact Suite > Settings and Options > Calendar - Fields

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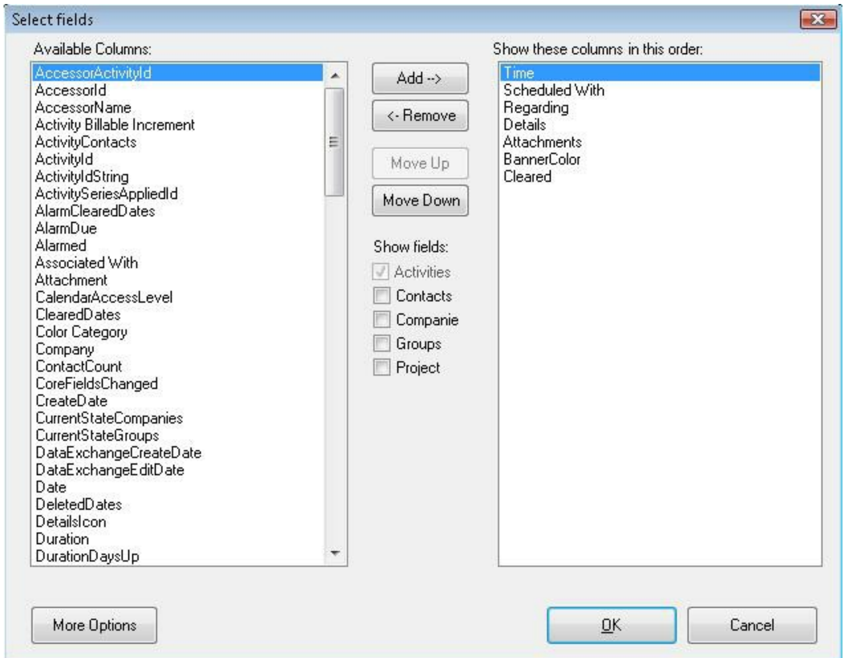
Calendar - Fields

Fields will change the look of the activity in the calendar.



To add fields to be displayed on the calendar activity double click the items in the Availble Columns list or select an item in list and click the add button. Items in the Show these columns in this order will be displayed in the activity in that order. To change the order select an item and use the Move Up / Move Down buttons to change the order.

When checked, Contacts checkbox will show Contact fields in the Available Columns list, so they can be shown in activities. Fields will then be prefaced with the table name.

When checked, Companies checkbox will show Company fields in the Available Columns list, so they can be shown in activities. Fields will then be prefaced with the table name.

When checked, Groups checkbox will show Group fields in the Available Columns list, so they can be shown in activities. Fields will then be prefaced with the table name.

When checked, [Project Table Name] checkbox will show Project Table fields in the Available Columns list, so they can be shown in activities. Fields will then be prefaced with the table name.

Clicking the More Options button will give you more options to set

When checked, Display activity type icons checkbox will display activity type icons in the activities. Max number of icons for an activity is 4.

When checked, Display invitation status icons checkbox will display the invitation status in the activites. Max number of icons for an activity is 4.

When checked, Display secondary icons checkbox will display secondary icons in the activities. Max number of

Properties

Article ID: options_-_fields
Views: 218
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:29 PM

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icons for an activity is 4.

When checked, Display Activity Series checkbox icons will display the series icons in the activities. Max number of icons for an activity is 4. This will slow down refreshes.

When checked, Display Project icons checkbox will display the project tables icon in activities associated with it. Max number of icons for an activity is 4. This will slow down refreshes.

When checked, Each field displays on its own line checkbox will show one field per line in the activities.

Separate fields using this character ((none), |, :, - , +, =) will divide each field with the selected character when Each field displays on own line checkbox is not checked.

When checked, Compress blanks will ignore a blank field and move the next non-blank field up to fill the line. This is available when Each field displays on own line checkbox is not checked.

When checked, Replace MyName with "Regarding" checkbox will take out the current MyRecord user and replace with the Regarding field in the activities.

When checked, Display field labels using this many letters checkbox will put the first [selected number] letters of the field name before the contents of the field.

Display these contacts handles how Scheduled With will display in the activities (Contacts and Users, Contacts First then Users, Contacts Only, Users First then Contacts, Users Only).

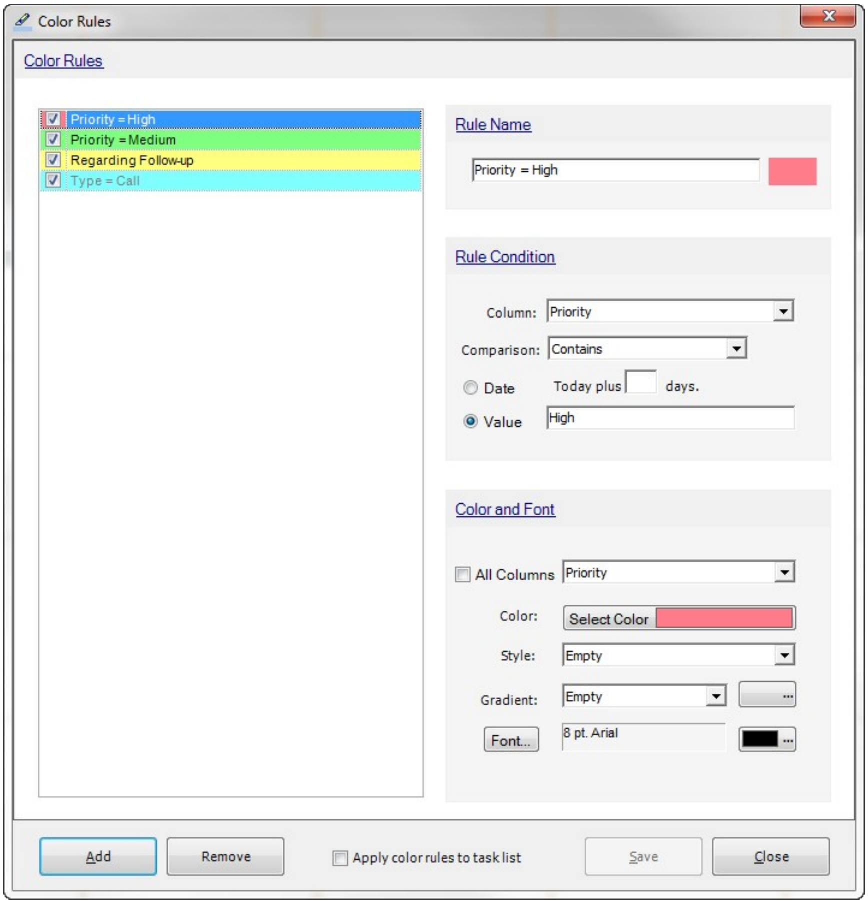
Display in this order: is the field that Scheduled With will be sorted on.

See also

Settings
Options
Options - Calendar
Calendar - Color Rules

Calendar - Color Rules

Color rules are designed to colorize records for rows that match a condition. Color rules can be based on text condition like the one below. In this color rule we are making all rows blue where the word "Triumph" apears in the MAKE column.



When Apply color rules to task list is checked the calendar color rules will over be used for task, instead of the current task list color rules.

New Color Rule
1. Click the Add button to insert a new untitled color rule
2. Give the rule a unique name
3. Set what column the condition will match against and the type of comparison
4. Select the date or value the column should match against
5. If you want the whole row to be colored check the aplly color entire row, if not uncheck it and select the column that will be colored
6. Select the color of the rule
7. Clicking more options will give options for style, gradient and font

Delete Color Rule
1. Highlight the rule
2. Click the Remove button

To learn more on how color rules are created click here.

See also

Settings
Options
Options - Calendar
Calendar - Fields

Properties

Article ID: options_-_color
Views: 201
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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Filter Panels

Date Range Panel
Record Manager Panel
Picklist Panel
Color Rules Panel
Types Panel
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Scheduled For Panel
Resources Panel
Options Panel

See also

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Chart
Tables and Forms
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Printing
How-To Examples

Properties

Article ID:	filter_panels
Views:	228
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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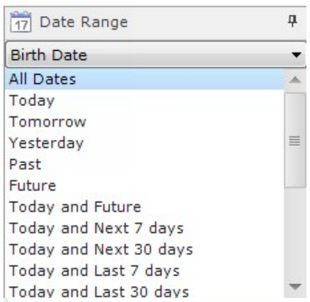
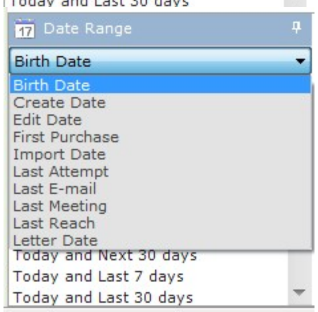
Date Range Panel

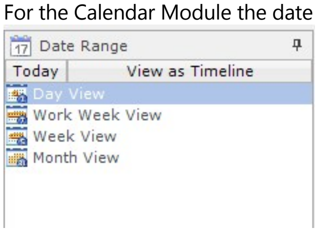
At the lower left corner of all most views you will find the date selector list. You can use this list to quickly filter your rows by a date range. This is much like native ACT's date-range selector in the Task List but with a little more power. Our date range selector allows you to select which date field you want to filter.
By default the date is the "Created Date" field but you may want to filter on your own custom field like "Project Start Date" or the "Sold Date" from the Automobile demo table. To show by "SoldDate" click on the drop downlist and select "Sold Date"





With your new setting, try selecting a different date range from the list. Remember that you are now filtered on that date field and if you have not entered any dates in any record then no record will match and your list will be empty

For the Calendar Module the date range panel switches between the day, work week, weekly and montly views.



See also

Record Manager Panel
Picklist Panel
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Types Panel
Priority Panel
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Properties

Article ID: date_panel
Views: 181
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:32 PM

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Record Manager Panel

The Record Manger panel allows you to show entries based on the record manager of the entry.

Clicking on the drop down you can chose Select All, Select None or choose a team to display. The Task and Calendar Modules do not have the drop down list.

See also

Date Range Panel
Picklist Panel
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Types Panel
Priority Panel
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Properties

Article ID: record_manager_panel
Views: 176
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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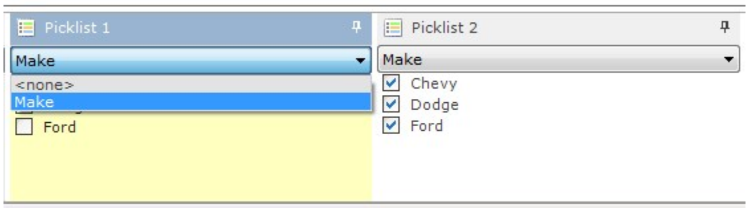
Picklist Panel

The Pick list panel 1 & 2 allows you to filter based on a field with an attached drop down list.



To set up the picklist panel select the field from the drop down.

Right clicking on the panel you can chose Select All or Select None to show all the record mangers or none.

See also

Date Range Panel
Record Manager Panel
Color Rules Panel
Types Panel
Priority Panel
Scheduled For Panel
Resources Panel
Options Panel

Properties

Article ID: custom_panel
Views: 220
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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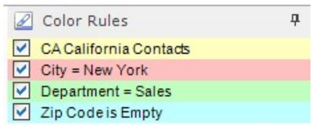
Color Rules Panel

The Color Rules Panel shows the color rules you have made. Rules with the boxes checked are turned on, those without checks will not be colored. To turn on or off a color rule click the box. To edit the color rules double click on the panel to bring up the designer, click here for more information.



See also

Date Range Panel
Record Manager Panel
Picklist Panel
Types Panel
Priority Panel
Scheduled For Panel
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Options Panel

Properties

Article ID: color_rules_panel
Views: 208
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:32 PM

Actions

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Types Panel

The Types Panel shows the activity types in the ACT database. Types with the boxes checked are turned on, those without checks will not be displayed. To turn on or off a type click the box.

This is only on the Calendar and Task Modules.

See also

Date Range Panel
Record Manager Panel
Picklist Panel
Color Rules Panel
Priority Panel
Scheduled For Panel
Resources Panel
Options Panel

Properties

Article ID: types_panel
Views: 178
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:32 PM

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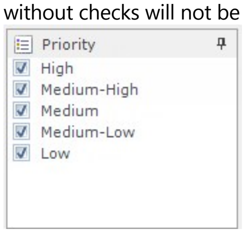
Priority Panel

The Priority Panel shows the priorities you have made. Priorities with the boxes checked are turned on, those without checks will not be displayed. To turn on or off a priority click the box.



This is only on the Calendar and Task Modules.

See also

Date Range Panel
Record Manager Panel
Picklist Panel
Color Rules Panel
Types Panel
Scheduled For Panel
Resources Panel
Options Panel

Properties

Article ID: priority_panel
Views: 164
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:32 PM

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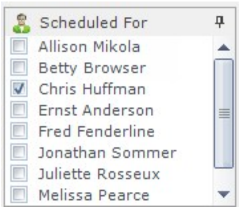
Scheduled For Panel

The Scheduled For Panel shows the users in your ACT database. Users with the boxes checked are turned on, those without checks will not be displayed. To turn on or off a user click the box.



This is only on the Calendar and Task Modules.

See also

Date Range Panel
Record Manager Panel
Picklist Panel
Color Rules Panel
Types Panel
Priority Panel
Resources Panel
Options Panel

Properties

Article ID: scheduled_for_panel
Views: 201
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:32 PM

Actions

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Resources Panel

The Resources Panel shows the resources in your ACT database. Resources with the boxes checked are turned on, those without checks will not be displayed. To turn on or off a resource click the box.

This is only on the Calendar and Task Modules.

See also

Date Range Panel
Record Manager Panel
Picklist Panel
Color Rules Panel
Types Panel
Priority Panel
Scheduled For Panel
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Properties

Article ID: resources_panel
Views: 197
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:33 PM

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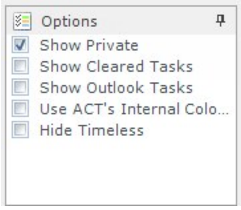
Options Panel

The Options Panel gives quick access to options dealing with activities. Checked boxes are turned on, those without checks will not be displayed. To turn on or off an option click the box.



Show private will show private activities.
Show cleared tasks will show cleared tasks.
Show Outlook tasks will show tasks from Outlook.
Use ACT's internal color will display the color scheme set in ACT.
Hide timeless will not display the timeless activities on the view.

This is only on the Calendar and Task Modules.

See also

Date Range Panel
Record Manager Panel
Picklist Panel
Color Rules Panel
Types Panel
Priority Panel
Scheduled For Panel
Resources Panel

Properties

Article ID: options_panel1
Views: 212
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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Pivot Table

A Pivot grid represents dynamic data (obtained from an underlying data source) in a cross-tabulated form to create cross-tab reports , similar to Pivot Tables in Microsoft Excel®. Column headers display unique values from one data field, and row headers - from another field. Each cell displays a summary for the corresponding row and column values. By specifying different data fields, you can see different totals. This allows you to get a compact layout for a complex data analysis.

Create Pivot   Edit Pivot

See also

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Article ID:	pivot_table1
Views:	228
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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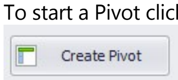
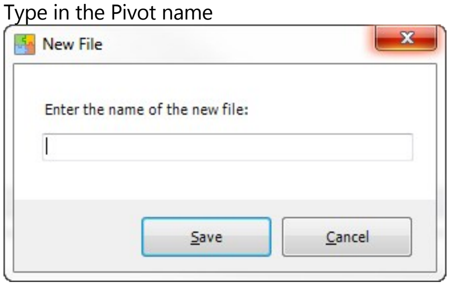
Create Pivot

To start a Pivot click on the Create Pivot button in the Pivot Options window.



Type in the Pivot name



See also

Edit Pivot

8+1 0 Tweet

Properties

Article ID:	create_pivot
Views:	214
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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Actions

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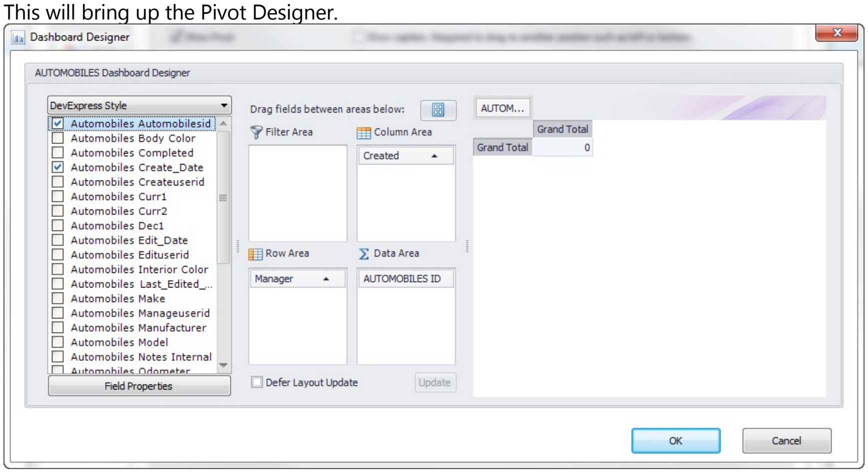
Edit Pivot

To change a pivot select the pivot to modify in the Pivot Options window and click the Edit Pivot button

This will bring up the Pivot Designer.



Checking The fields in the list will make them available in the pivot grid. The fields in the Filter Area, Row Area, Column Area and Data Area boxes can be dragged between the boxes to change what areas the field will show up in.

See also

Create Pivot

Properties

Article ID: edit_pivot
Views: 202
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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Home > Impact Suite > Chart

Chart

Chart Wizard   Create Chart   Edit Chart

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Properties

Article ID: chart2
Views: 202
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:33 PM

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Home > Impact Suite > Chart > Chart Wizard

Chart Wizard

The Chart Wizard gives more advanced and granular options for the chart

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Properties

Article ID: chart_wizard2
Views: 185
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:34 PM

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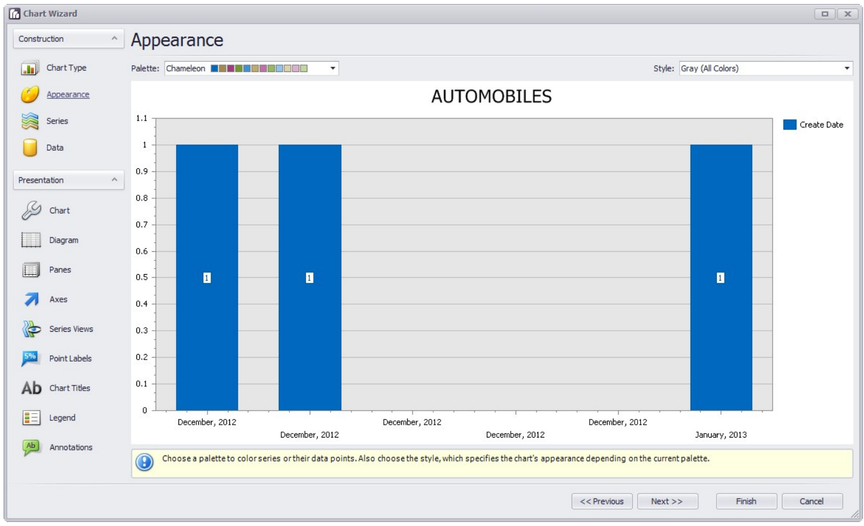


Chart Wizard
Construction
Chart Type
Appearance
Series
Data
Presentation
Chart
Diagram
Panes
Axes
Series Views
Point Labels
Chart Titles
Legend
Annotations
Appearance
Palette: Chameleon
Style: Gray (All Colors)
AUTOMOBILES
Create Date
December, 2012
December, 2012
December, 2012
December, 2012
December, 2012
January, 2013
Choose a palette to color series or their data points. Also choose the style, which specifies the chart's appearance depending on the current palette.
<< Previous
Next >>
Finish
Cancel

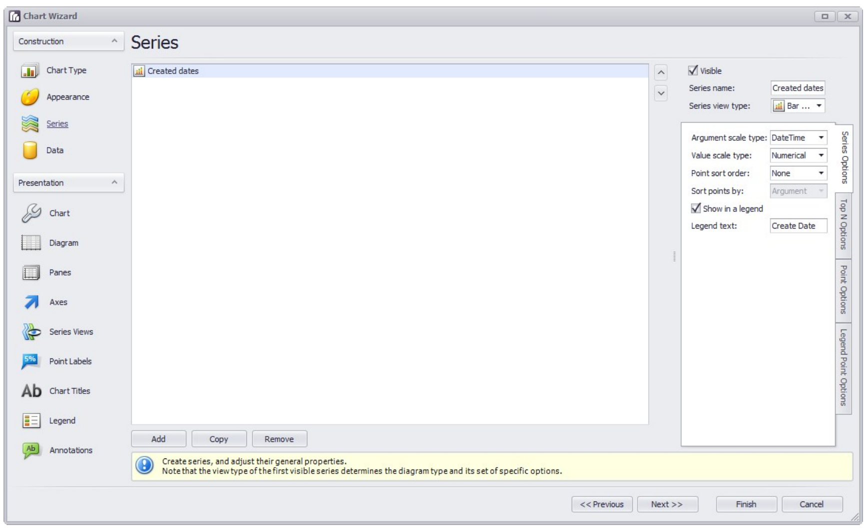


Chart Wizard
Construction
Chart Type
Appearance
Series
Data
Presentation
Chart
Diagram
Panes
Axes
Series Views
Point Labels
Chart Titles
Legend
Annotations
Series
Created dates
Visible
Series name: Created dates
Series view type: Bar ...
Argument scale type: DateTime
Value scale type: Numerical
Point sort order: None
Sort points by: Argument
Show in a legend
Legend text: Create Date
Series Options
Top N Options
Point Options
Legend Point Options
Add
Copy
Remove
Create series, and adjust their general properties.
Note that the view type of the first visible series determines the diagram type and its set of specific options.
<< Previous
Next >>
Finish
Cancel

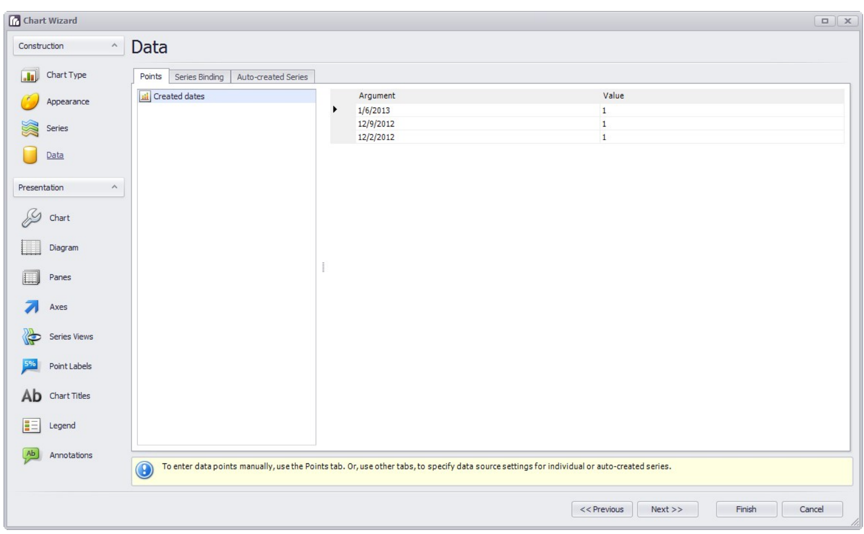
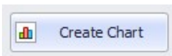


Chart Wizard
Construction
Chart Type
Appearance
Series
Data
Presentation
Chart
Diagram
Panes
Axes
Series Views
Point Labels
Chart Titles
Legend
Annotations
Data
Points
Series Binding
Auto-created Series
Created dates
Argument
Value
1/6/2013
1
12/9/2012
1
12/2/2012
1
To enter data points manually, use the Points tab. Or, use other tabs, to specify data source settings for individual or auto-created series.
<< Previous
Next >>
Finish
Cancel

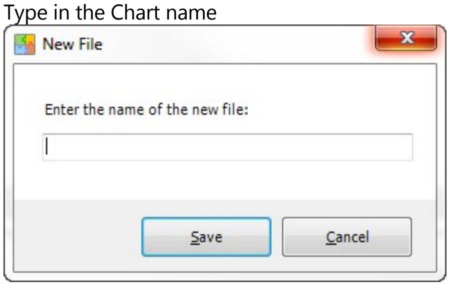
See also

Create Chart

To Create a chart click on the Create Chart button in the Chart Options window.



Type in the Chart name



See also

Chart Wizard
Edit Chart

Properties

Article ID:	create_chart
Views:	186
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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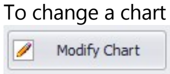
Edit Chart

To change a chart select the chart to modify in the Chart Options window and click the Edit Chart button



This will bring up the Chart Designer. Changes made in the designer will show up in real time on the chart next to the options.

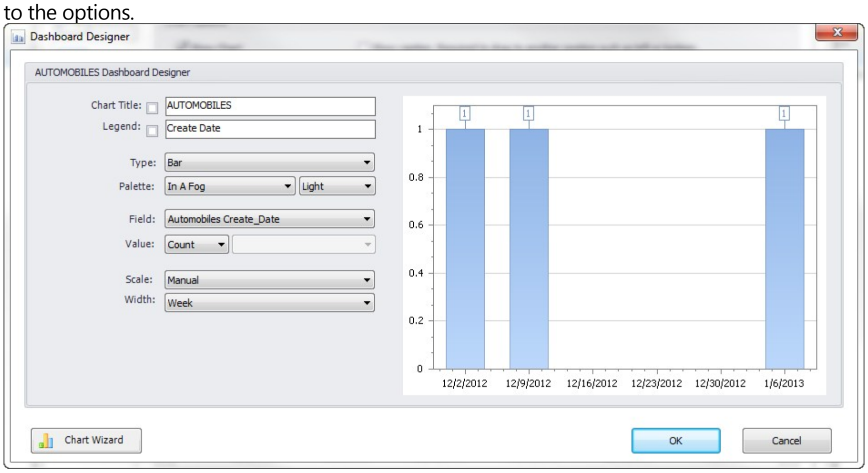


Chart Title when checked will display the text at the top of the report.
Legend when checked will show a legend for each series.
Type will change the type of chart that is displayed.
Palette will change the color of the bars and the background.
Field will be the table field that is in the chart
Value will count, sum, average, min or max the field
Scale is how to display the field
Width is how to display the time
To get to more advanced options click the Chart Wizard button, to learn more about the wizard click here.

See also

Chart Wizard
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Article ID: edit_chart
Views: 184
Created By: jimdurkin
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Tables and Forms

This section describes the features and function to create a custom table and design the data-entry form.

Tables
Define Fields and tables
Table Wizard
Forms Designer
Advanced Functions
Controls on Forms
Field Designer
Table Designer
Tab Order on Detail View

To design a new custom table please read Tables

To add, remove or change fields in a custom table please read: Define Fields and tables

To import a table from a template please read: Table Wizard

To design the data entry form please read: Forms Designer

For a list of the controls you can add to a data entry form please read: Controls on Forms

See also

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Article ID: table_designer2
Views: 312
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 7/18/2014 12:09 AM

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Tables

This section describes how to add custom tables into your ACT database.

- Create a table
- Rename a table
- Import structure
- Export Structure
- Delete Table
- Table Image and Calendar Options

- Add a table manually
- Add a table from a table from a file
- Add a table using the table wizard

This section describes how to import data from an Excel spread sheet (*.XLS or *.XLSX) or an XML formatted file.

- Import data from excel into a custom table

See also

Define Fields and tables
Table Wizard
Forms Designer
Advanced Functions
Controls on Forms
Field Designer
Table Designer
Tab Order on Detail View

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Article ID: tables2
Views: 259
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:34 PM

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Create a table

Adding custom tables allows you to track information that would have been well-nigh impossible with native ACT!. Custom tables can include invoices, events, household items or inventory etc.

There are two ways to create a custom table:

- Use a table template that includes multiple fields.
- Design your table from scratch, by adding your own field list.

For more information please see: Your First Custom Table

To add a custom table follow these steps:

1. In ACT! go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. Click on the CREATE TABLE button
3. Enter the name of the custom table in the window.
4. Click on the SAVE button

By default here are a few system field which are automatically added to your new custom table. These fields include: Edit Date, Created Date, Completed, Last Edited By, Parent EntityID, Parent Entity Name, Record Creator and Record Manager.

Properties

Article ID: create_a_table
Views: 202
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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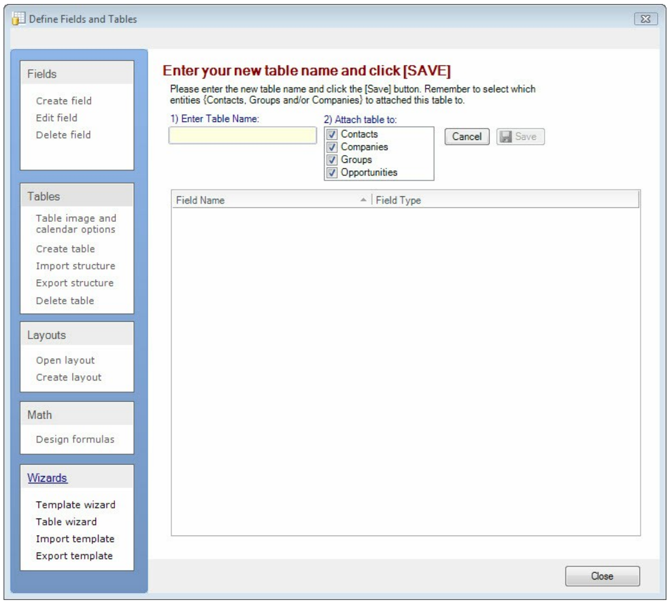
Once the table has been created you can add you desired field by clicking on the Create Field link



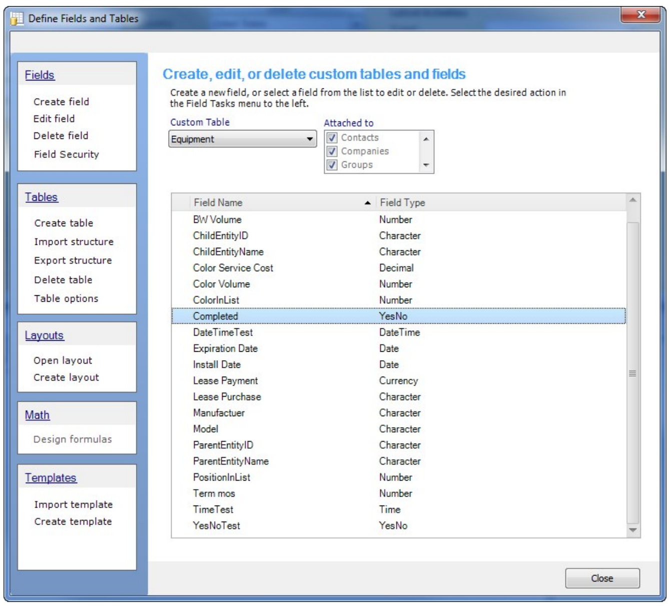
See also

Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Export template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

Delete a table

To delete a custom table follow these steps:

1. In ACT! go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. Select the table to delete, from the custom table drop down
3. Click on the DELETE TABLE button
4. Enter Act Credentials
5. Confirm table deletion



See also

Create a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Export template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

Properties

Article ID:	delete_a_table
Views:	193
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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Displaying all records

Once you have created your own custom table the list of records from this table can be display in many places and in many formats such as; list views, charts and pivot tables.

Lets say you created a custom table named "Service Calls" there are two places you would like to see your service call records:

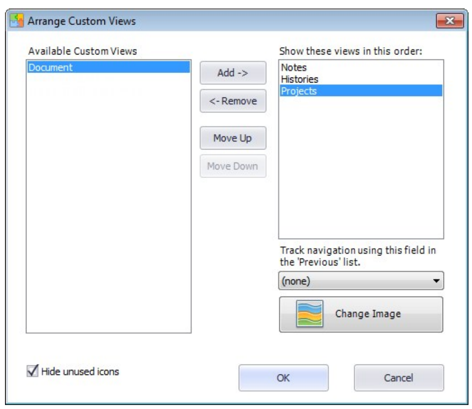
1. In a mater list (**All records**) which displays all the service call records in the current database.
2. In a minor list which displays only the service calls attached to the current contact, company, group or opportunity.

To turn on the master list using **ACT's native navigation** bar follow these steps:

1. Go to the TOOLS menu and select IMPACT...
2. Select the TABLES section from the left tab
3. Place a check mark in the MODE column (it will now read "Enhanced")
4. Click the OK button

To turn on the master list using **Impacts new navigation bar** follow these steps:

1. On the navigation bar click on the ARRANGE link (its just below the 'Search' icon)
2. Select your desired table from the list on the left
3. Click on the ADD button to move it to the right side
4. Click on OK button to close



On this form you can set the position of the icons by using the 'Move Up' and 'Move down" buttons. You can also the the icon image by clicking the "Change Image" button. For best results the image should be 32 x 32 pixels.

See also

Create a table
Delete a table
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Export template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

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Properties

Article ID:	display_a_table
Views:	185
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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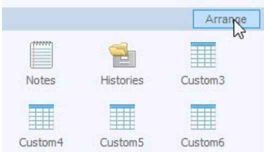
Adding the table to the navigation

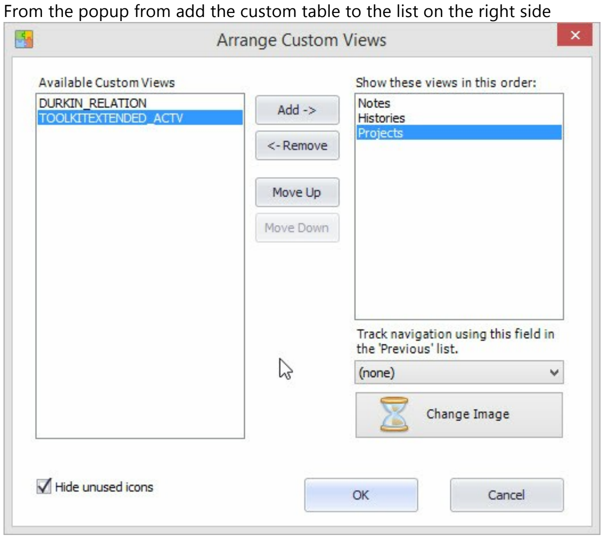
Once you have added a custom tables to your act! database you can add a short cut to the navigation bar on the left side. By default Impact replaces the native act! with an enhanced NavBar (naviation bar Read more) which includes short cuts to custom tables.

To add a custom table shortcut follow these steps:

1. On the enhanced NavBar click on the Arrange text



2. From the popup from add the custom table to the list on the right side



You can also change the icon or picture using the "**Change Image**" button.

3. Click the OK button to close

See also

Create a table
Delete a table
Displaying all records
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Export template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

Properties

Article ID: adding_the_table_to_the_
Views: 192
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:35 PM

Actions

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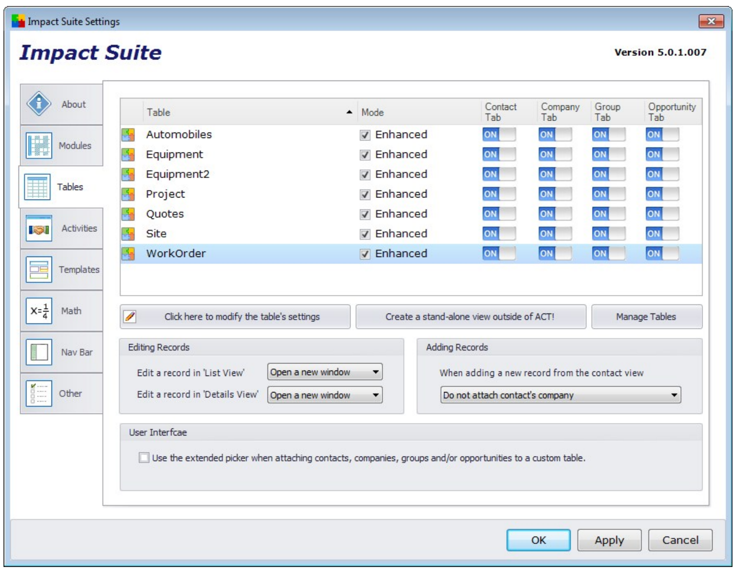
Displaying records on a tab

To display records from a custom table on a tab you need to turn ON the option for each details view in ACT!.

When you add a custom table all four detail view tabs are on by default. These include; contacts, companies, groups and opportunities. (as shown below) To turn of the custom table tab for any one of these sections follow these steps:

1. In ACT go to the TOOLS menu and select IMPACT...
2. Click on the TABLES section
3. Click on the icon on the column you want to change.
   The indicator should change from ON to OFF
4. Click on OK



By default the tabs are positioned at the end of the tab row. To re-position you can manually create a tab in the ACT layout designer. Please follow these steps to position the tab on the far left or first position.

1. In ACT go to the TOOLS menu and select DESIGN LAYOUT -> CONTACT
2. Use the mouse to select the tab control at the bottom of the layout
3. Click F4 on the keyboard to open the Properties window
4. Click on the ellipse icon [...] next to "Edit Tabs   (Collection)"
5. Click on the ADD TAB button
6. Enter the tab name - *NOTE - Must use the same name as the custom table.*
7. Click OK to save the new tab which should now appear in the list.
8. You can use the "Move Up" or 'Move Down' buttons to position the tab
9. Go to the FILE menu and select SAVE
10. Go to the FILE menu and select EXIT

See also

Create a table
Delete a table
Displaying all records
Adding the table to the navigation
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Export template

Properties

Article ID: displaying_records_on_a_

Views: 173

Created By: jimdurkin

Modified By: [Modified By]

Created Date: 3/24/2014 12:31 PM

Last Modified: 3/24/2014 1:35 PM

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Delete table
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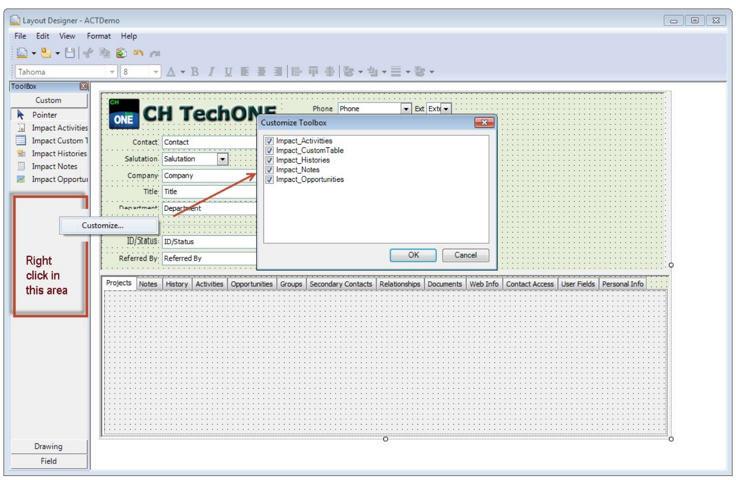
Displaying In-Line Components

When you create a new custom table you can display this information almost anywhere on the contact details view. By default when you add a custom table it creates a new tab at the end of the tabs. This default option always forces the list to fill the entire tab. You may want to have the list only fill half the tab or even display the lisy above the tabs next to the contact name. For either of these solutions follow these steps:

1. In ACT go to the TOOLS menu and select DESIGN LAYOUT -> CONTACT

2. Click on the "Custom' toolbar in the upper right side.

   NOTE * The first time after install Impact you need to add your new custom controls to the custom toolbox.
   To do this right click on the toolbox and select CUSTOMIZE from the popup menu.
   When the 'Customize Toolbox" window opens place a check mark in all the entries and click OK

3. Select the "Impact Custom Tables' component

4. Using the mouse drag a rectangle on the area you wish the component to reside.
   Pictured below we have dragged the PROJECTS table into the lower left corner of a tab named Projects.
   Note that you can now add addition contact field to the same tab page.

Properties

Article ID:	displaying__in-line_lists_and_charts
Views:	205
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:35 PM

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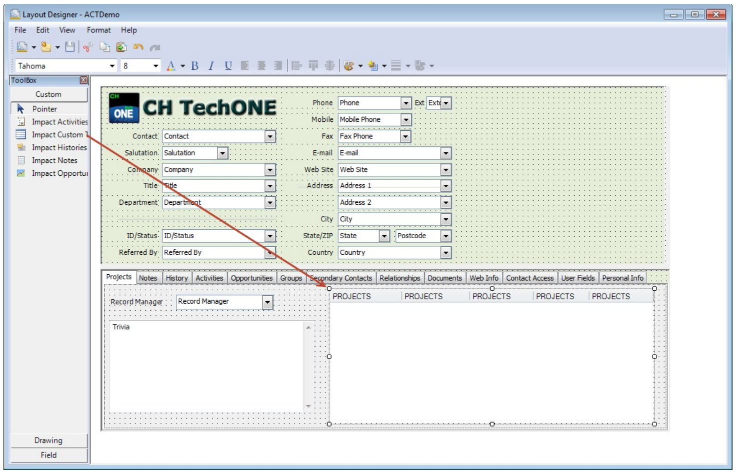
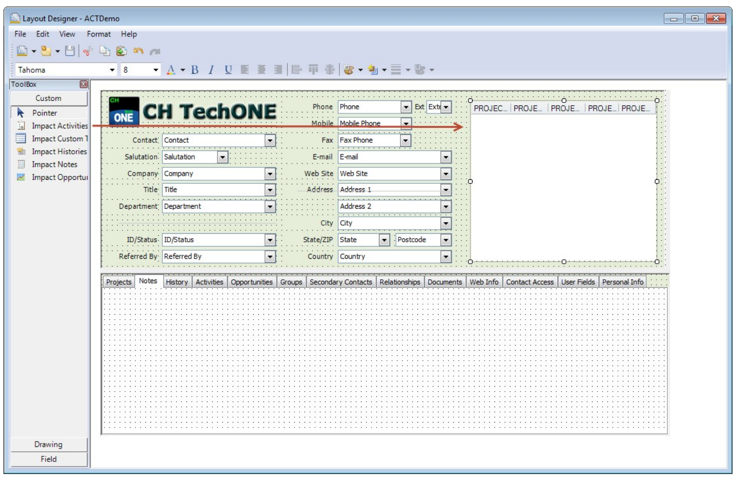


5. You can add the component to the top section above and outside of a tab. This is very useful if you want the information to be top level. Otherwise if its on a tab the users will need to click to open the tab each time. Having the component at the top eliminates the extra mouse click



6. Go to the FILE menu and select SAVE

As an added bonus you can add list from other native ACT tables such as activities, histories, notes and/or opportunities.

See also

Create a table
Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Export template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

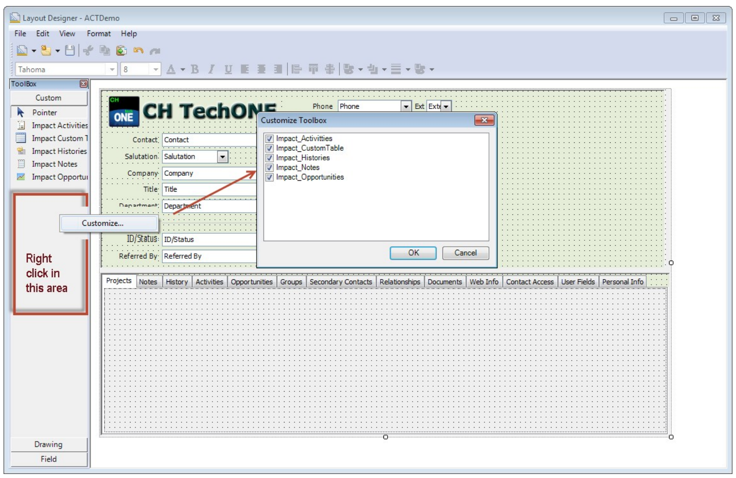
Displaying In-Line Native Lists Charts

As in the previous help topic about displaying custom table in line you can also display some of ACT's native tables such as notes, histories, activities and/or opportunities above the tabs. To display a native table on the top of the details view follow these steps:

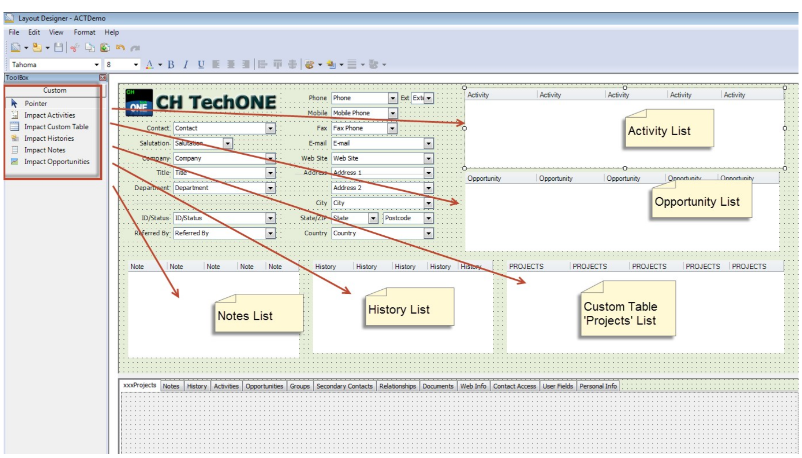
1. In ACT go to the TOOLS menu and select DESIGN LAYOUT -> CONTACT

2. Click on the "Custom' toolbar in the upper right side.

   NOTE * The first time after install Impact you need to add your new custom controls to the custom toolbox.
   To do this right click on the toolbox and select CUSTOMIZE from the popup menu.
   When the 'Customize Toolbox" window opens place a check mark in all the entries and click OK



3. Select your desired component from the toolbox and using your mouse drag an area you want the list to appear.
   In this picture we have added five lists to the top section of ACT!



4. Go to the FILE menu and select SAVE then EXIT

   In this picture we see the results of our new design. Each component has the ability to display the records in one of three styles: List view, as a chart or in a pivot table. To change style simple use the smart Tag in the upper right corner of the component. You can change styles on the fly without going back into the designer.

Properties

Article ID:	displaying_in-line_native_lists_and_cha
Views:	179
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:35 PM

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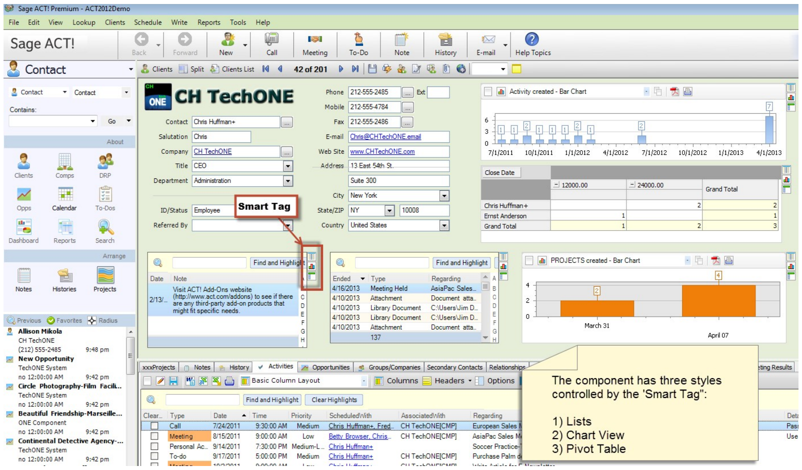


See also

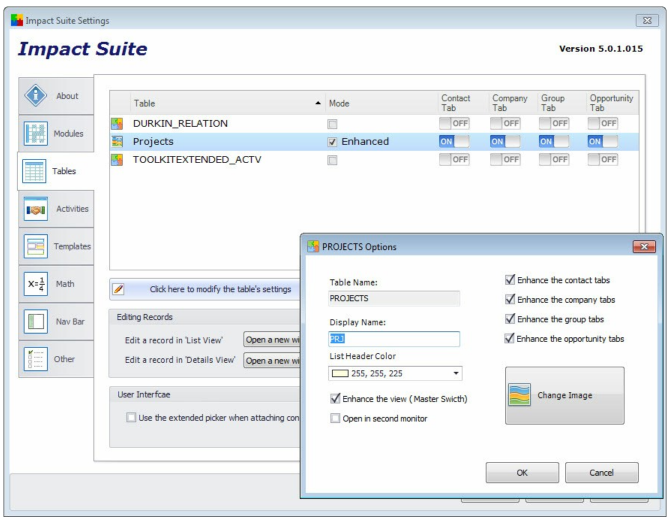
Create a table
Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Change Table Name
Import a table
Duplicate a table
Import template
Export template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

Change Table Name

Sometime when you create a table you give is a descriptive name such as 'Serial Numbers' but realize a shorter name is more appropriate for the interface such as "SN" (Especially when it appears on the left navigation icons.)

To change the name of an existing table follow these steps:

1. In ACT go the the TOOLS menu and select IMPACT
2. Click on the TABLES tab on the left side
3. Select your desired table
4. Click on the "Click Here to modify the tables's setting' button
5. On this 'Options'; form change the 'Display Name" of the table
6. Click on the OK button.



See also

- Create a table
- Delete a table
- Displaying all records
- Adding the table to the navigation
- Displaying records on a tab
- Displaying In-Line Components
- Displaying In-Line Native Lists Charts
- Import a table
- Duplicate a table
- Import template
- Export template
- Delete table
- Import Records into Custom Tables
- Create Parent Child Relationships

Properties

Article ID:	change_table_name
Views:	172
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:35 PM

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Import a table

Import table function uses a pre-defined table structure file to create a new table. Inside this DTB file is a list of fields which. These fields once imported can be added, removed or altered.

ACT Data Scheme Template (*. DTB)

To import a table using a DTB file please follow these steps:

1) In ACT! go to the TOOLS menu and select DEFINE CUSTOM TABLES
2) Click on the IMPORT TEMPLATE link
3) Select the ZIP file that contains the DTB file, from your hard drive
4) The default name is the new custom table is the name of the DTB file. You can change this name.
5) Click on the IMPORT button

See also

Create a table
Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Duplicate a table
Import template
Export template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

Properties

Article ID: import_a_table
Views: 182
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:35 PM

Actions

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Duplicate a table

To Duplicate your custom table under a new name follow these steps:

1. Go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. From the drop down select the table you which to export (copy)
3. Click on the "Export Template" link under the TABLES panel on the left side
4. Give the file a unique name such as the name of the new table you want to create then click SAVE
5. Click on the "Import Template" link under the TABLES panel on the left side
6. Select the file you saved
7. By default the new table name will be the name of the file but you can change it at this time.
8. Click on the SAVE button when you are completed.

See also
Create a table
Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Import template
Export template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

Properties

Article ID: rename_a_table
Views: 187
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:35 PM

Actions

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Import template

Import table template function uses a pre-defined table structure file to create a new table. Inside this DTB file is a list of fields which. These fields once imported can be added, removed or altered.

ACT Data Scheme Template (*. DTB)

To import a table using a DTB file please follow these steps:

1) Click on the IMPORT TEMPLATE link
2) Select the DTB file from your hard drive
3) The default name is the new custom table is the name of the DTB file. You can change this name.
4) Select the top level entities this custom table is attached to.
5) Click on the SAVE button

See also

Create a table
Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Export template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

Properties

Article ID:	import_structure
Views:	169
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:36 PM

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Export template

Export table template function saves the fields in the current custom table in a file. You can use this file to import the table into a different database or into the same database under a different custom table name.

ACT Data Scheme Template (*. DTB)

To export a table into a DTB file please follow these steps:

1. Select your desired table to export
2. Click on the EXPORT TEMPLATE link
3. On the SAVE DIALOG enter your DTB file name
4. Click SAVE

See also

Create a table
Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Delete table
Import Records into Custom Tables
Create Parent Child Relationships

Properties

Article ID:	export_structure
Views:	176
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:36 PM

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Delete table

Delete table function deletes the table and all records in the custom table. This action is non reversible and completely removes the custom table from your ACT database. The only way to retrieve this information is to restore an ACT backup file.

To delete a table from your database follow these steps:

1. Go to the tools menu and select DEFINE CUSTOM TABLES
2. Select your desired table from the drop down
3. Click on the DELETE TABLE link
4. For additional security you are asked to re-enter your credentials
5. Click on the YES button when prompted.

See also

Create a table
Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Export template
Import Records into Custom Tables
Create Parent Child Relationships

Properties

Article ID:	delete_table
Views:	167
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:36 PM

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Import Records into Custom Tables

There are two ways to import records into a custom table 1) import using the wizard to all contacts, companies, groups or opportunities 2) single import is used for importing into one contact, company, group or opportunity.

The best use for the wizard is import many records to many contacts, companies, groups or opportunities in Act. For example this would be used to import 300 invoices for 50 contacts in Act. For more information click here.

The best use for the single import is many records to a single contact, company, group or opportunity. For example this would be best to import 50 car sales for a contact in Act. For more information click here.

See also

Create a table
Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Export template
Delete table
Create Parent Child Relationships

Properties

Article ID:	import_records_into_cust
Views:	183
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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Import from Excel for all Contacts

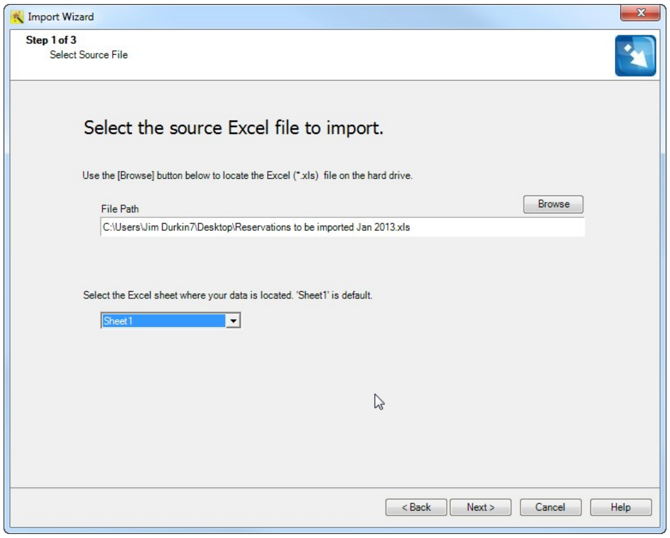
This section describes how to import data from an Excel spread sheet (*.XLS, *.XLSX, *.XML or *.CSV) or an XML formatted file.

To access the Import Wizard open the FILE menu and select "Import into custom table..." The 'Import Wizard" form will open. Click on the NEXT button to get to STEP 1.

STEP 1

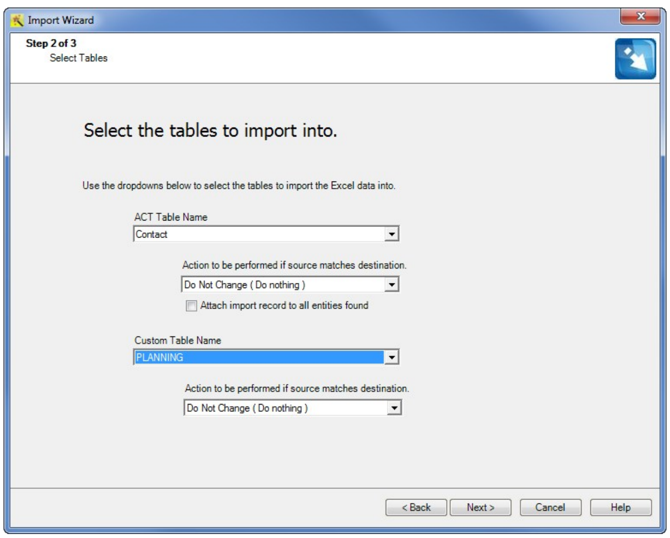
Properties

Article ID:	import_from_excel_for_al
Views:	226
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM



1. Click on the BROWSE button to select your file to import. File formats supported are XLS, XLSX, CSV and XML.
2. Using the SHEET drop down select which sheet to import.
3. Click on the **NEXT >** button to continue to Step 2.

STEP 2



Top level table: Contact Company , Group or Opportunity

1. Using the "ACT Table Name" drop down select which top level table to attached these new record to.
You must select either; contact, company, group or opportunity.

2. Using the drop down select the "Action to be performed if the source matches destination". Do not change will not change the parent entity field, change will update the field

3. Check 'Attach import record to all entities found' will attach all attach the imported data to all contacts, companies, groups or opportunities that match the search criteria

4. Using the "Custom Table Name" drop down select which custom table you are importing into. This will display all the custom tables in the current database.

5. Using the drop down select the "Action to be performed if the source matches destination" Do not change will not change the parent entity field, change will update the field

6. Click on the NEXT > button to continue to Step 3

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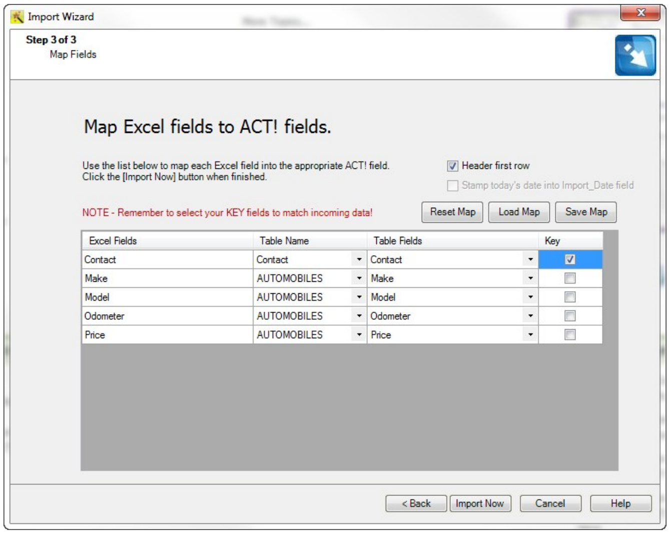
STEP 3



By default the import engine will match like fields from the Excel file to fields in the parent and custom table.. So if you Excel headers match all the fields in your custom table then. If the 'Table Fields' column is blank you need to use the drop down to select the fields in the custom table to map to.

If the custom table has a date field called "Imported_Date" you can check the Stamp today's date into Import_Date field, the import date will be stamped into that field during the import.

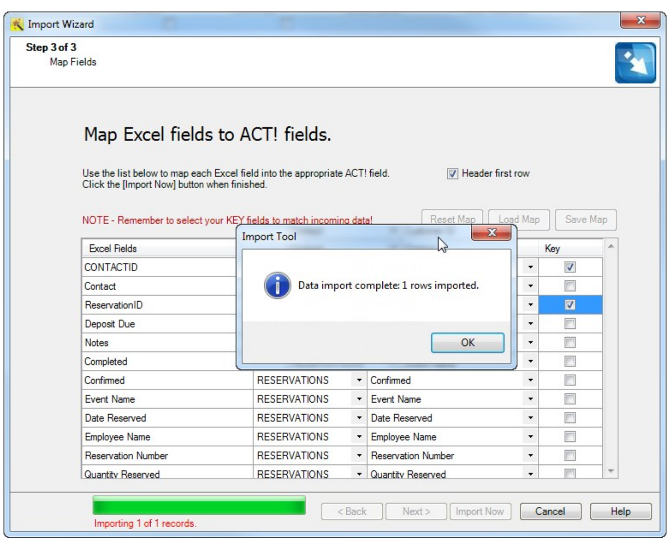
You can save and recall maps by using the "Save Map" and "Load Map" buttons. Maps are stored in an XML file format on your hard drive.

1. Select the desired fields to map to.

2. Select the KEY fields
   These are the fields which the import will match on when looking up the record in the database.

3. Click on the **IMPORT NOW** button to start the import process.

When you click on the IMPORT NOW button you will be presented with a progress bar indicating the amount of work completed. When the import has finished you will receive a confirmation dialog. Click OK to close the import wizard.



See also

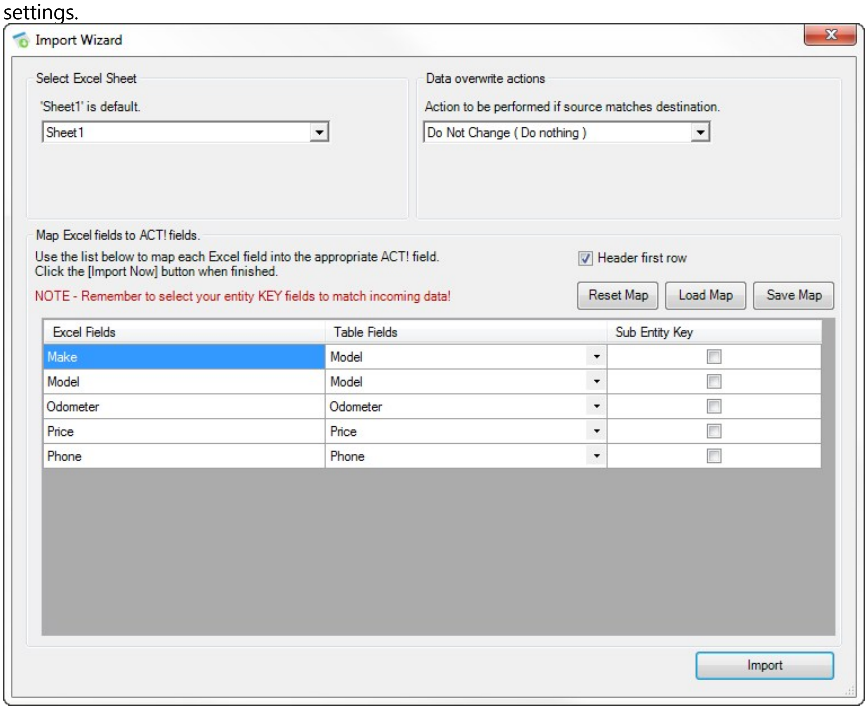
Import from Excel for single contact

Import from Excel for single contact

Importing an Excel file to a single contact is simple and easy.

1. Click the Import Excel button in the tab toolbar

2. A window will say you are about to import a file, click yes to continue.
3. Select the File to import
4. A simple version of importer will come forward. If you have imported before it will pick up the previous settings.



5. Pick the sheet from the Excel file.
6. If you want to replace any records already attached to the current ACT entity choose replace with source from the data overwrite options and select a sub entity key to match the records on.
7. Pick the table field from the drop down to match with the excel fields.
8. Click Import

See also

Import from Excel for all Contacts

Properties

Article ID: import_from_excel_for_si

Views: 219

Created By: jimdurkin

Modified By: [Modified By]

Created Date: 3/24/2014 12:31 PM

Last Modified: 3/24/2014 1:36 PM

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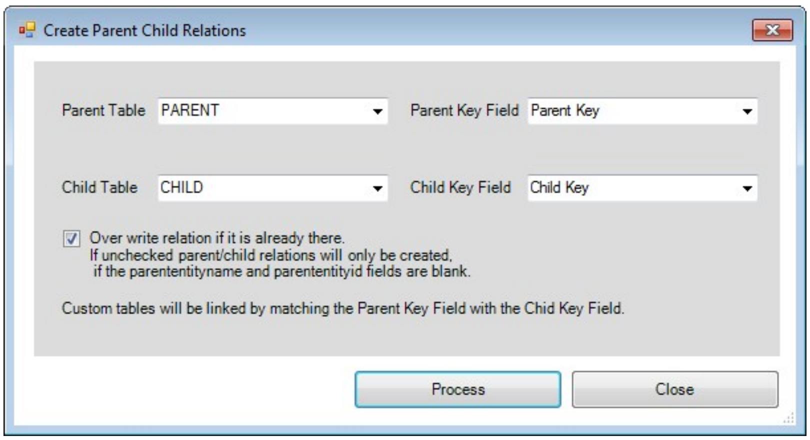
Create Parent Child Relationships

To create parent child relationships with records already entered into custom tables

1. Click File > Create parent-child relations...
2. Set the parent table
3. Set the key for the parent table
4. Set the child table
5. Set the key field for the child table
6. Click the process button to relate the tables



The overwrite checkbox will if checked create the relation if a match if found, if unchecked it will create the relation if there is a match and the parententityname & parententittyid fields are blank.

See also

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Delete a table
Displaying all records
Adding the table to the navigation
Displaying records on a tab
Displaying In-Line Components
Displaying In-Line Native Lists Charts
Change Table Name
Import a table
Duplicate a table
Import template
Export template
Delete table
Import Records into Custom Tables

Properties

Article ID: create_parent_child_relati
Views: 195
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:36 PM

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Define Fields and tables

This section show you how to add or change a custom table

Properties

Article ID: tables_fields
Views: 210
Created By: jimdurkin

Fields:

- Create field
- Edit Field
- Delete field

Tables:

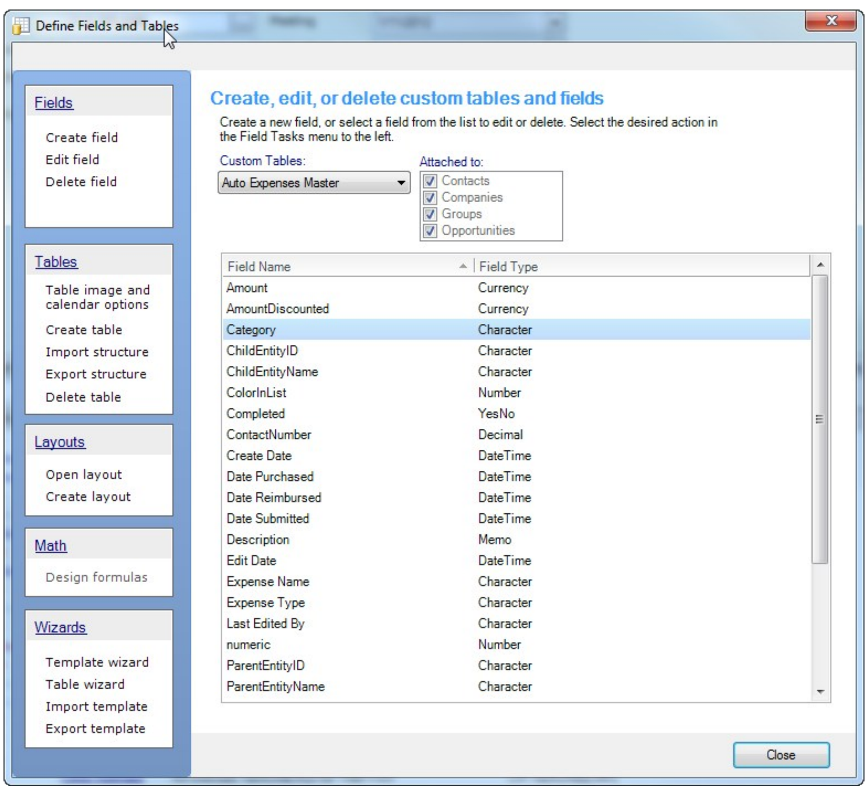
- Create a table
- Import a table
- Duplicate a table
- Import Template
- Export Template
- Delete Table

Layouts:

- Open layout
- Create layout

Wizards:

- Template wizard
- Table wizard
- Import template
- Export template



See also

Tables

Modified By: [Modified By]
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[Advanced Functions](#)
[Controls on Forms](#)
[Field Designer](#)
[Table Designer](#)
[Tab Order on Detail View](#)

Home > Impact Suite > Tables and Forms > Define Fields and tables > Add a New Field

Add a New Field

To add a new field into the custom table click on this link.

This Define Fields form comes forward when you are adding or editing field.

Field Name
The display name used in the interface

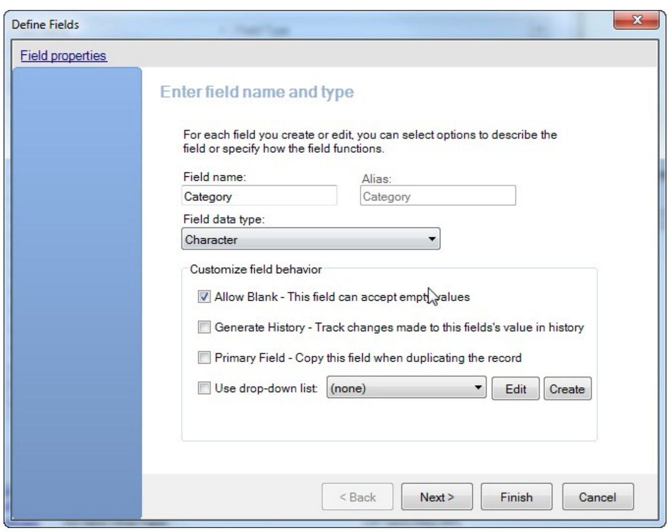
Alias
The name in the SQL database (This can not be changed)

Allow Blank
Allow the user to leave the field empty.

Generate History
Create a history record when this field changes.

Primary Field
Is this a primary field.

Use drop-down list
Is there a drop down list the users can select from when doing data entry.



Default value (Auto Fill or Auto Populate)
The default value can be any text string or the default value can be automatically filled/populated from the parent record. Below we are populating the field using the value from the Contact's ID/Status field.

If you want to display the Contacts ID/Status field on the data-entry form without creating a field in the child table please read see [Add contact field onto the form](#)

Field Format
The format string used to format the data entry pattern such as phone numbers.

Properties

Article ID:	add_a_new_field
Views:	200
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:37 PM

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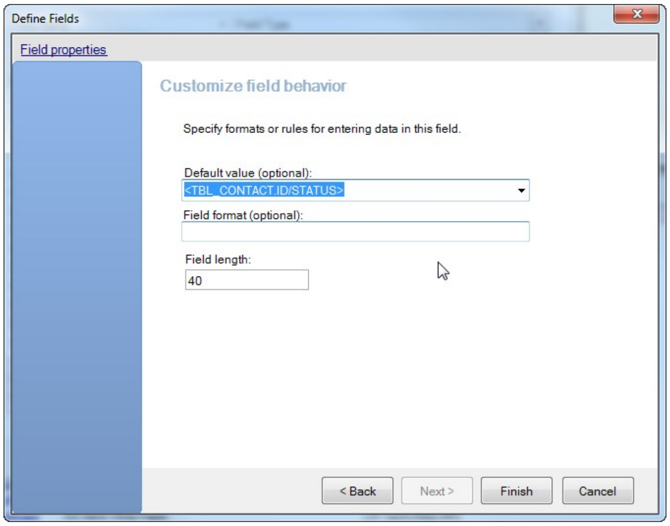
Field Length
The maximum length of characters which can be entered into this field. In the old DOS/DBF days you always tried to make this the smallest number possible. In today's SQL driven data back ends it is not as critical to performance.



See also

Change a Field
Remove a Field
Define Fields
Phone and Email Fields

Home > Impact Suite > Tables and Forms > Define Fields and tables > Change a Field

Change a Field

To change a field in the custom table click on this link.

This Define Fields form comes forward when you are adding or editing field.

Field Name
The display name used in the interface

Alias
The name in the SQL database (This can not be changed)

Allow Blank
Allow the user to leave the field empty.

Generate History
Create a history record when this field changes.

Primary Field
Is this a primary field.

Use drop-down list
Is there a drop down list the users can select from when doing data entry.

Properties

Article ID:	change_a_field
Views:	200
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:37 PM

Actions

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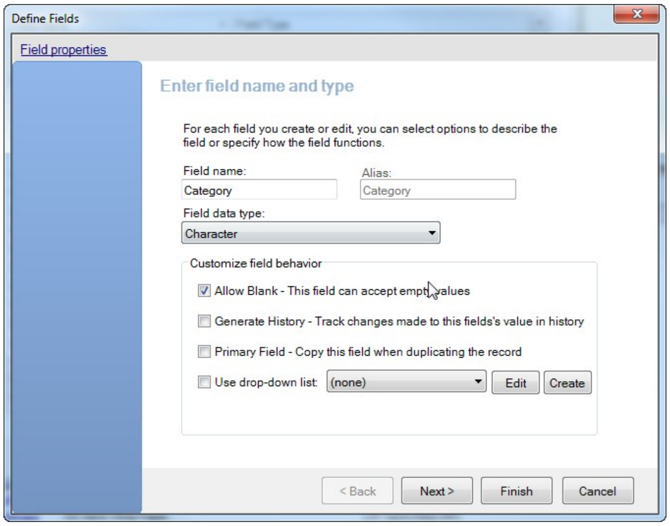
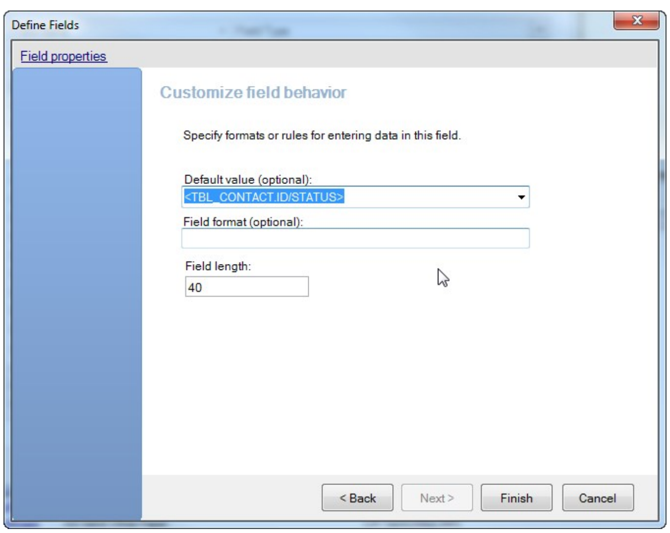


Default value (Auto Fill or Auto Populate)
The default value can be any text string or the default value can be automatically filled/populated from the parent record. Below we are populating the field using the value from the Contact's ID/Status field.

If you want to display the Contacts ID/Status field on the data-entry form without creating a field in the child table please read see Add contact field onto the form

Field Format
The format string used to format the data entry pattern such as phone numbers.

Field Length
The maximum length of characters which can be entered into this field. In the old DOS/DBF days you always tried to make this the smallest number possible. In today's SQL driven data back ends it is not as critical to performance.



See also

Add a New Field
Remove a Field
Define Fields
Phone and Email Fields

Remove a Field

To remove a field from a custom table follow these steps:

1) Highlight your desired field
2) Click on the Delete Field link
3) Confirm the field deletion dialogue box

See also

Add a New Field
Change a Field
Define Fields
Phone and Email Fields

Properties

Article ID:	remove_a_field
Views:	180
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:37 PM

Actions

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Define Fields

This Define Fields form comes forward when you are adding or editing field.

Field Name
The display name used in the interface

Alias
The name in the SQL database (This can not be changed)

Allow Blank
Allow the user to leave the field empty.

Generate History
Create a history record when this field changes.

Primary Field
Is this a primary field.

Use drop-down list
Is there a drop down list the users can select from when doing data entry.

Properties

Article ID:	field_descriptors
Views:	175
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:37 PM

Actions

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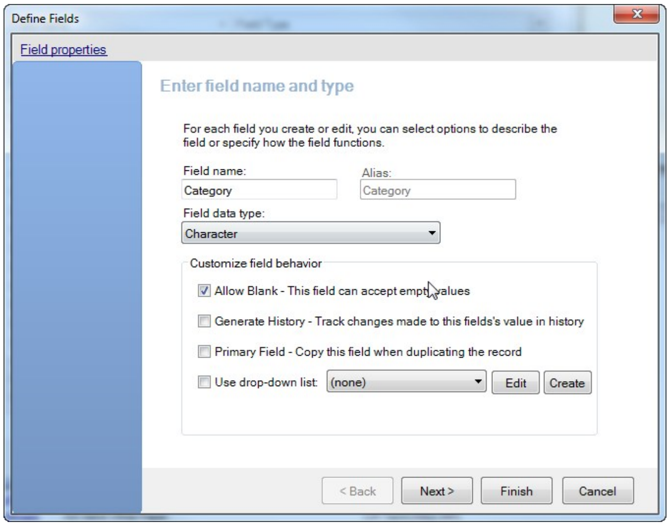
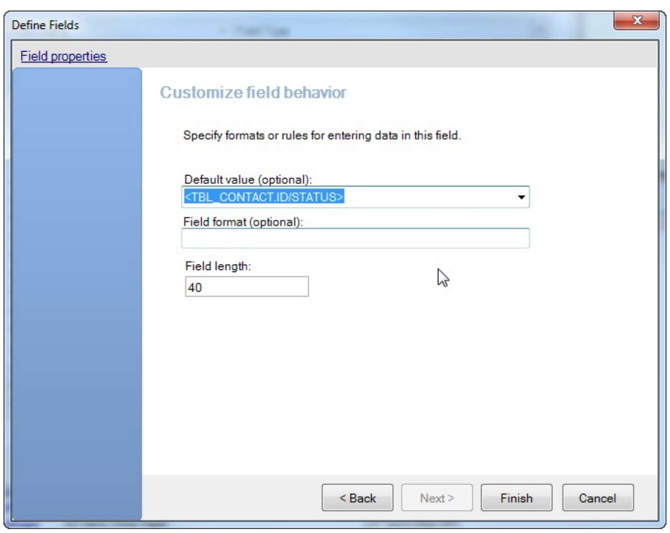


Default value (Auto Fill or Auto Populate)
The default value can be any text string or the default value can be automatically filled/populated from the parent record. Below we are populating the field using the value from the Contact's ID/Status field.

If you want to display the Contacts ID/Status field on the data-entry form without creating a field in the child table please read see Add contact field onto the form

Field Format
The format string used to format the data entry pattern such as phone numbers.

Field Length
The maximum length of characters which can be entered into this field. In the old DOS/DBF days you always tried to make this the smallest number possible. In today's SQL driven data back ends it is not as critical to performance.



See also

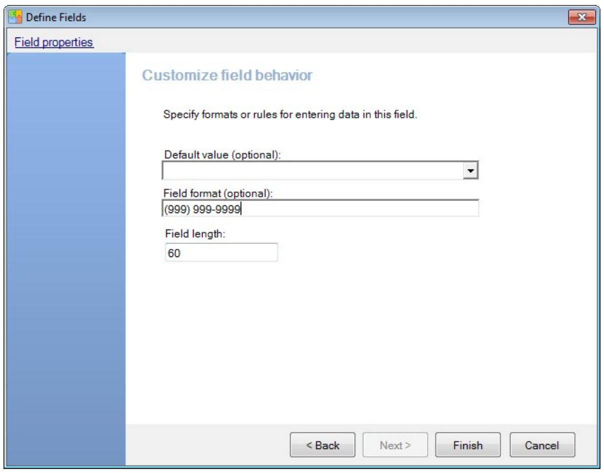
Add a New Field
Change a Field
Remove a Field
Phone and Email Fields

Phone and Email Fields

Custom tables support all the same field as ACT with these two exceptions:

Phone **Fields**
Email Fields

Both **Phone** and **Email** fields are not supported in custom tables. To create a **phone field** add a character field then set the format "(999)999-9999" on the second panel of the **Define Fields** form.



See also

[Add a New Field](#)
[Change a Field](#)
[Remove a Field](#)
[Define Fields](#)

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Properties

Article ID: field_data_tyles
Views: 188
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:37 PM

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Table Wizard

This section described various options to manage your custom tables

- Table Wizard
- Template Wizard
- Import Templates
- Export Template

See also

Tables
Define Fields and tables
Forms Designer
Advanced Functions
Controls on Forms
Field Designer
Table Designer
Tab Order on Detail View

Properties

Article ID:	table_wizard2
Views:	179
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:37 PM

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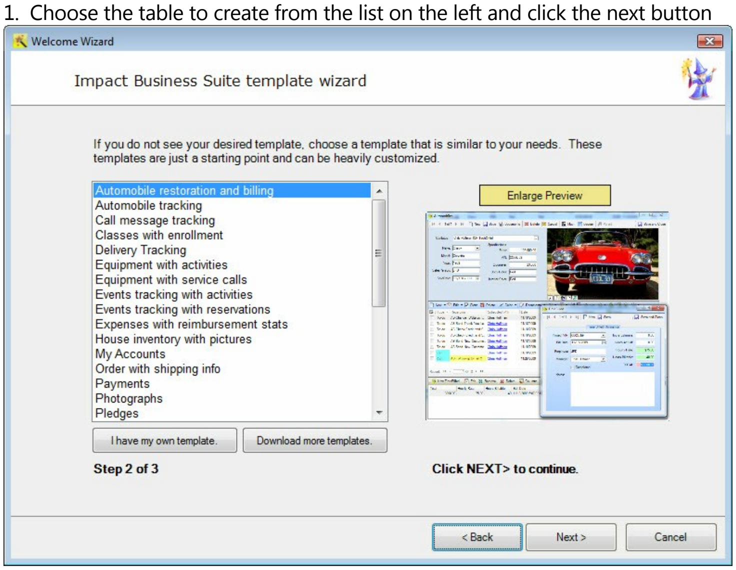
Table Wizard

The Table Wizard will guide you through the creation of custom table(s).

1. Choose the table to create from the list on the left and click the next button



2. The tables that will be installed will be displayed. Click Install Now to create the table(s).

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Properties

Article ID:	table_wizard1
Views:	199
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:37 PM

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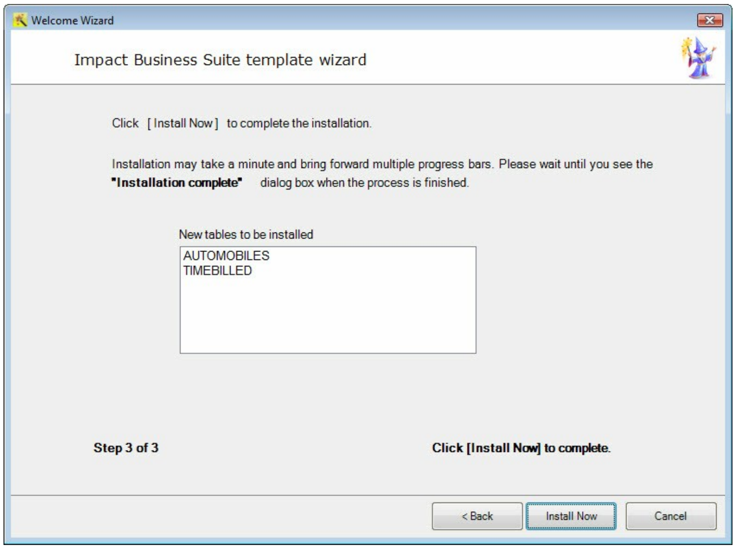
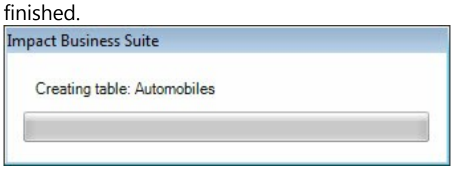


3. A window will show the progress of the table(s) creation. When finished a window will say the install in finished.



See also

Template Wizard
Import Template
Export Template

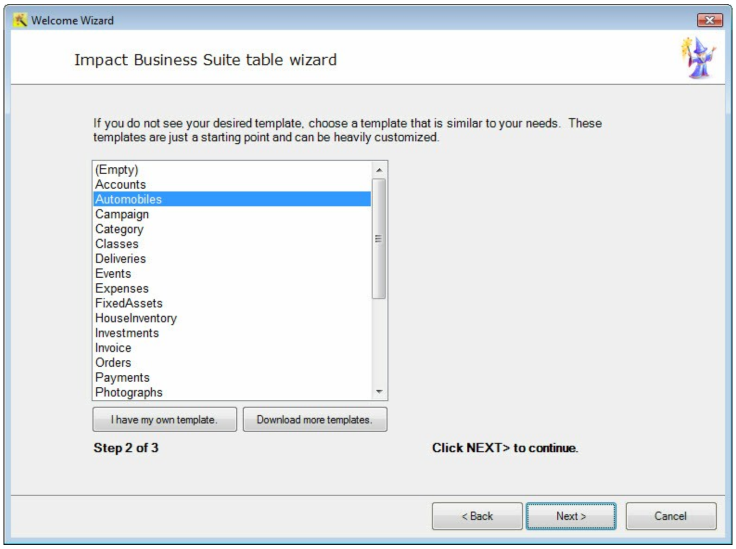
Template Wizard

The Template Wizard will guide you through the creation of custom table(s).

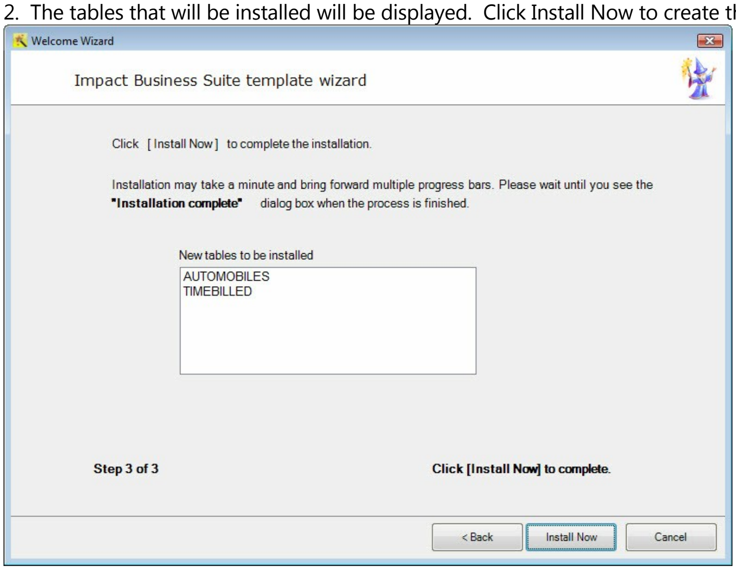
Properties

Article ID: template~wizard
Views: 162
Created By: jimdurkin

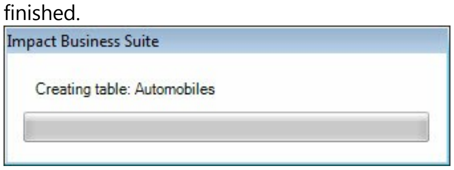
1. Choose the table to create from the list on the left and click the next button



2. The tables that will be installed will be displayed. Click Install Now to create the table(s).



3. A window will show the progress of the table(s) creation. When finished a window will say the install in finished.



See also

Table Wizard
Import Template
Export Template

Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:37 PM

Actions

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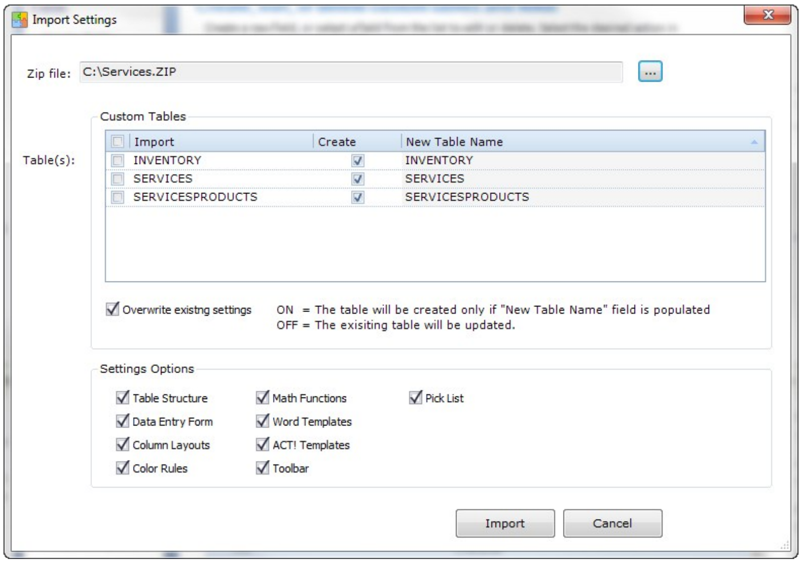
Import Template

You may be working with your consultant or just need to move a custom table from one database to another. You can import and export tables. You can import table structure, data entry forms, column layouts, color rules, math functions, Word templates, ACT templates, toolbars and picklists. Zip files need to have been exported with Impact Suite version 5 to include picklists.

To import existing table fields follow these steps:



1. Go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. At the bottom of the window click on the IMPORT TEMPLATE button
3. Choose the zip file containing the table to import
4. Click on the IMPORT button at the bottom of the form.

See also

Table Wizard
Template Wizard
Export Template

Properties

Article ID: import_template
Views: 165
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:38 PM

Actions

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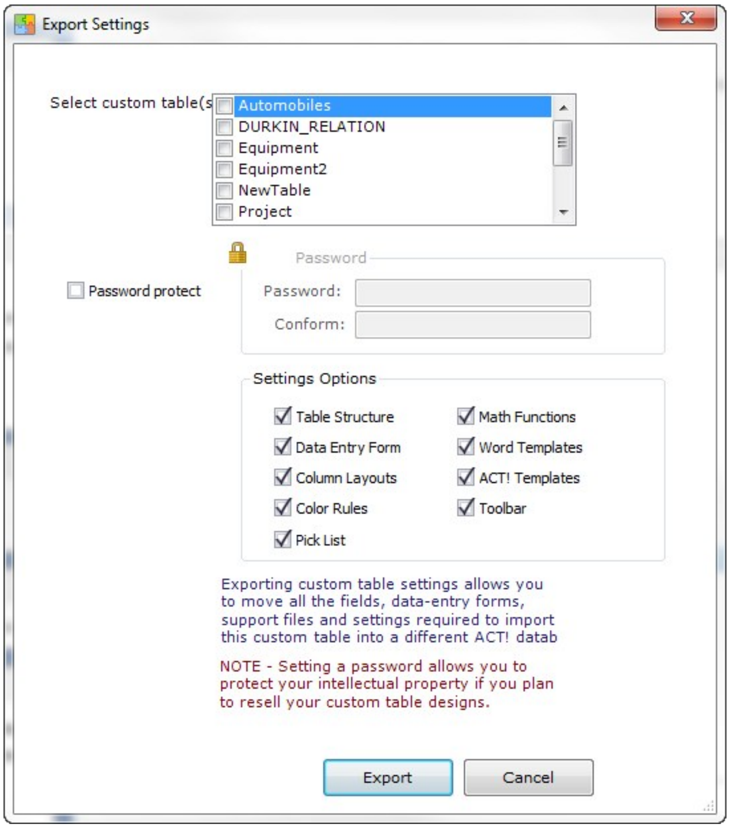
Export Template

You may be working with your consultant or just need to move a custom table from one database to another. You can import and export tables.

To **export** existing table fields follow these steps:



1. Go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. Click CREATE TEMPLATE
3. Check your desired table(s) to export.
4. Set a password if one is needed.
5. Select the parts of the custom table to export.
6. At the bottom of the window click on the EXPORT button
7. Give the file a unique name and SAVE it on your hard drive.

Now you can copy or email this file to another computer to import this custom table.

See also

Table Wizard
Template Wizard
Import Template

Properties

Article ID: export_template
Views: 163
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:38 PM

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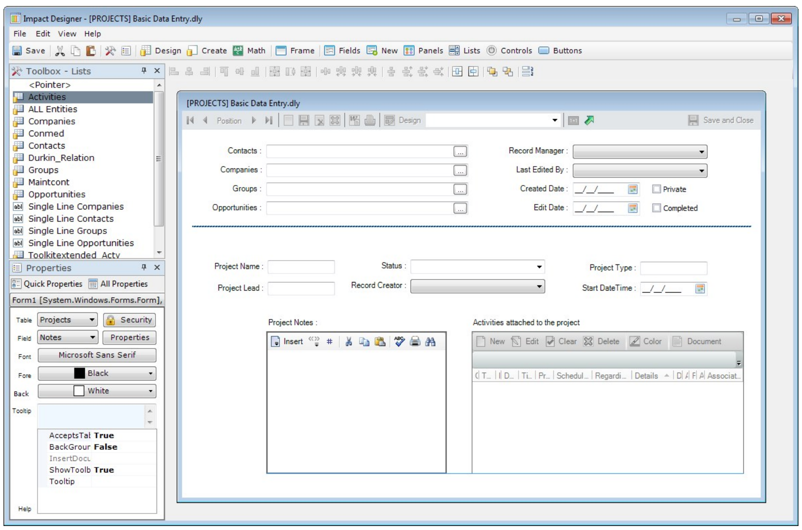
Forms Designer

The designer is comprised on 5 main areas listed below.

1. Toolbar and menus
2. Designer Surface
3. Toolbar Panel
4. Properties Panel
5. Math Functions Panel

As you design and modify the user interface of your custom table records, you will need to add, align, and position controls. Controls are objects that are contained within the form. Each type of control has its own set of properties, methods, and events that make it suitable for a particular purpose. You can manipulate controls in the designer by moving them around or changing there properties to behave in a different fashion.



Tags: Data entry designer, data-entry designer, custom table designer, design layouts

See also

Tables
Define Fields and tables
Table Wizard
Advanced Functions
Controls on Forms
Field Designer
Table Designer
Tab Order on Detail View

Properties

Article ID: forms_designer
Views: 277
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 5/14/2014 1:47 PM

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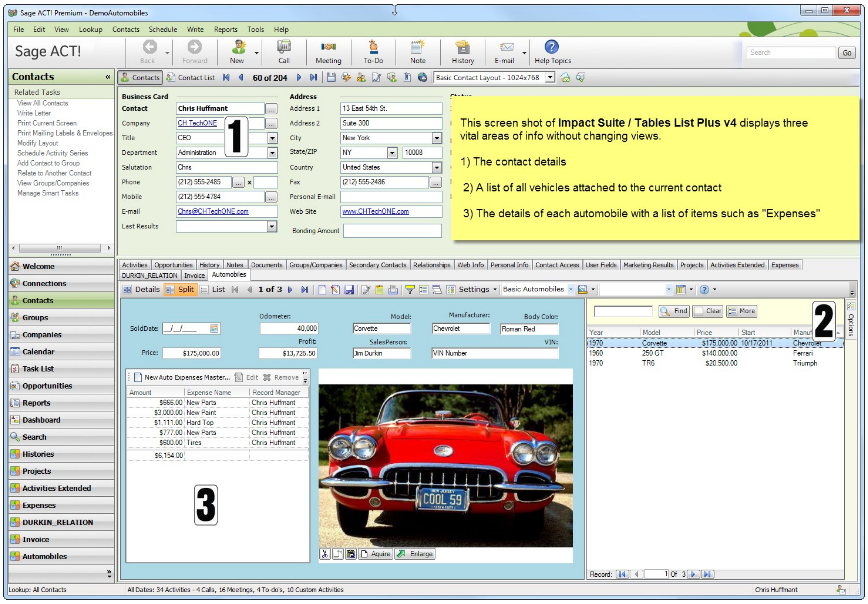
Fundamentals

Using our data-entry forms designer you can create unique data-entry forms fro your required business needs.



Editing a data-entry form
Adding a new field
Add contact field onto the form
Add Parent field onto the form
Changing Fonts and colors
Adding a child table

Scripting using Visual Basic

See also

Toolbars
Designer Surface
Toolbox Panel
Properties Panel
Math Functions Panel

Properties

Article ID: fundenmantals
Views: 182
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:38 PM

Actions

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Editing a data-entry form

You can edit the data-entry form by opening it in the forms designer.

There are two ways to open the forms designer.

1) In the list view click on the options button in the toobar, click on the data tab, select the data entry form from the list and click the modify form button

2) Open the data entry form and click the design button in the toolbar.

See also

Adding a new field
Add contact field onto the form
Add Parent field onto the form
Changing Fonts and colors
Adding a child table
Scripting using Visual Basic

Properties

Article ID:	editing_a_data-entry_form
Views:	188
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:38 PM

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Adding a new field

A new field can be added from the Field - New or from the ACT menu system.

See also

Editing a data-entry form
Add contact field onto the form
Add Parent field onto the form
Changing Fonts and colors
Adding a child table
Scripting using Visual Basic

Properties

Article ID:	adding_a_new_field
Views:	181
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:38 PM

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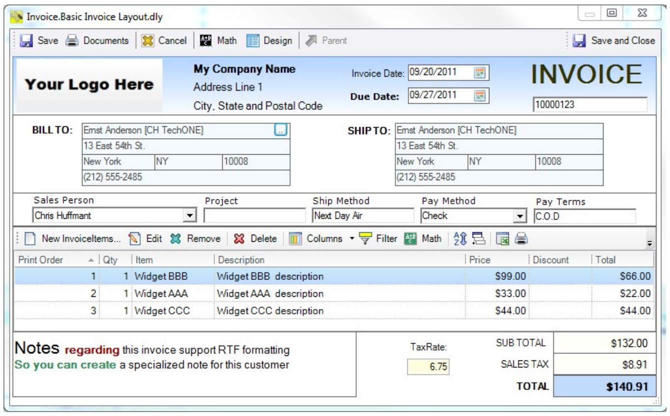
Add contact field onto the form

Sometime you need to add a field from the contact table onto the data entry form. On the screen shot below we are displaying the BILL TO and SHIP TO fields directly from the attached contact. This gives you more flexibility when doing data entry since you can confirm contact information.

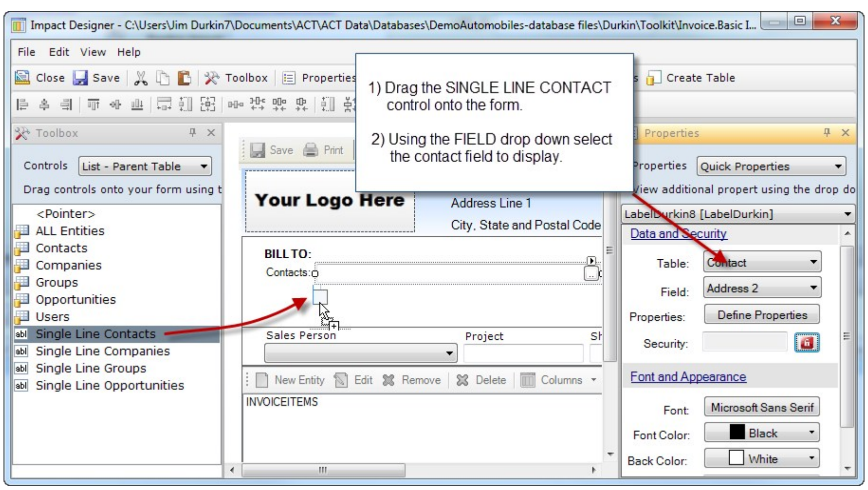


To add a contact field

1) Open the form in the form designer. See Editing a data-entry form for more information.

2) Using the controls drop down select List - Parent Tables

Using the designer you can add fields from the parent table (contact, company, groups or opportunities) directly onto the data-entry form of the custom record. This parent field will be in read-only mode.



See also

Editing a data-entry form
Adding a new field
Add Parent field onto the form
Changing Fonts and colors
Adding a child table
Scripting using Visual Basic

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Properties

Article ID: add_contact_field_onto_a
Views: 212
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:38 PM

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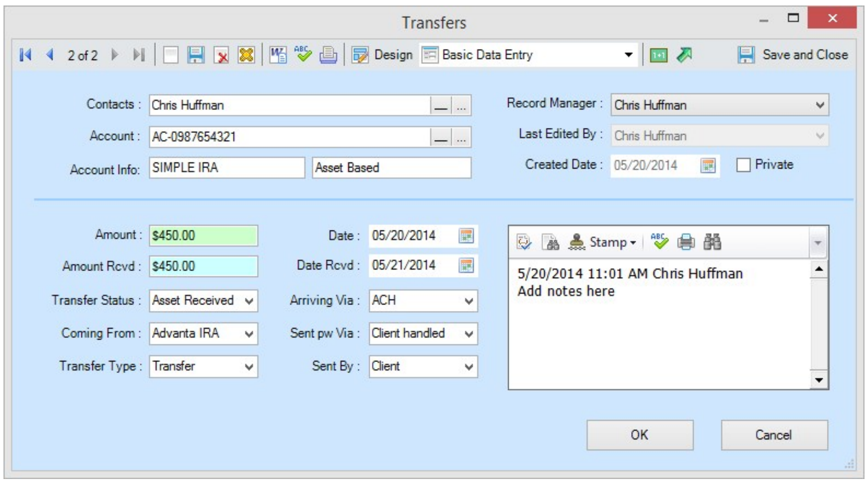
Add Parent field onto the form

Sometime you need to attach a record to a record in another custom table such as Time Billed attached to a record in the Project table or Transactions into the Accounts table. To do this you need to add the custom control onto your data entry form. This control is called "Single Line Custom Parent"

In the screen shot we are displaying the Account Number and other account fields in the data entry form for the transfer record.



To add a field from a parent table

Open the form in the form designer. See Editing a data-entry form for more information. On the top toolbar click on the **Parent Child Lists** icon to access the controls.

1. Drag the Single Line Custom Parent onto your form.
2. Select the desired custom table.
3. Select the desired field.
4. Click OK

Properties

Article ID: add_parent_field_onto_th
Views: 202
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 5/20/2014 8:29 AM
Last Modified: 5/20/2014 9:26 AM

Actions

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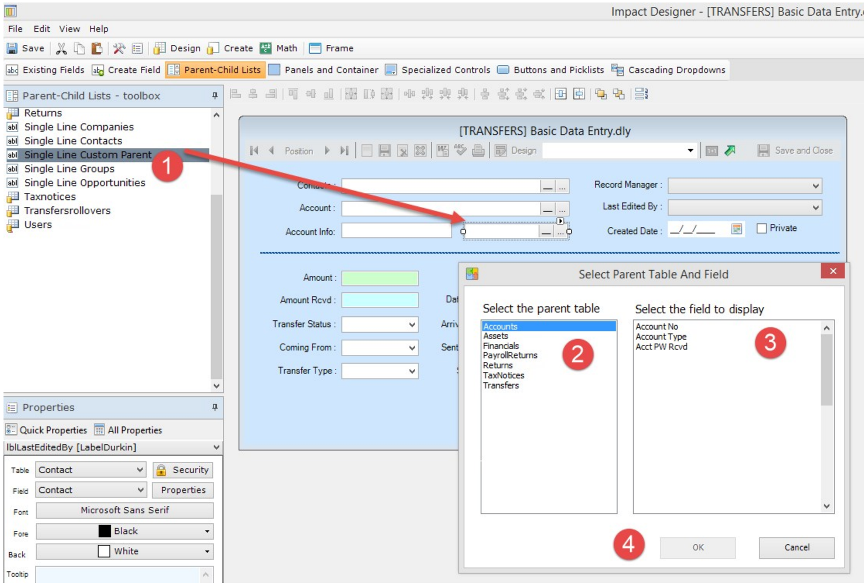
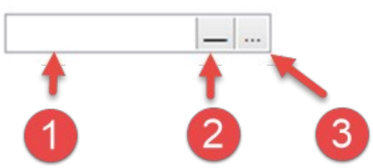


Note- All parent fields will be in read-only mode. To change the values in any field you need to click on the Lookup button and select a different record.

These controls are made up of three elements.

1. The Text box
2. The Navigation button
3. The Look up Button



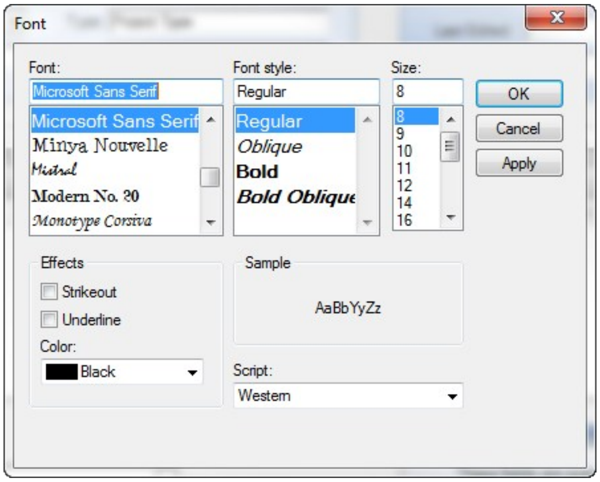
You can turn off the Navigation button and the Look up Button to de-cluttered the form if you have multiple controls.
Below we have five controls which display multiple fields from the attached contact. WE left only the first "Contact Name" control with buttons.

Changing Fonts and colors

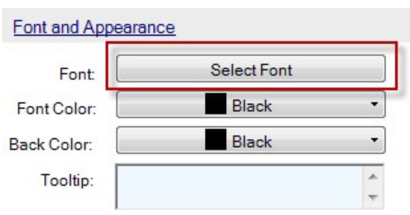
The font change window (below) will change the font features for control and can be accesed two different ways

Properties

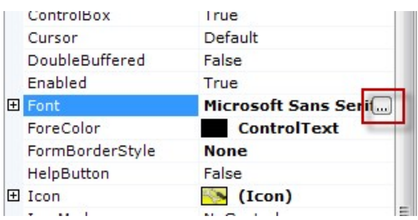
Article ID:	changing_fonts_and_colo
Views:	163
Created By:	jimdurkin



Using the Quick Properties
Click the 'select font' button and you can change the font type, font style, font size, font color and effects in the font window.



Using the .Net Properties
Click the elipses (...) button in the font property and you can change the font type, font style, font size, font color and effects in the font window.



See also

Editing a data-entry form
Adding a new field
Add contact field onto the form
Add Parent field onto the form
Adding a child table
Scripting using Visual Basic

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Created Date: 3/24/2014 12:31 PM
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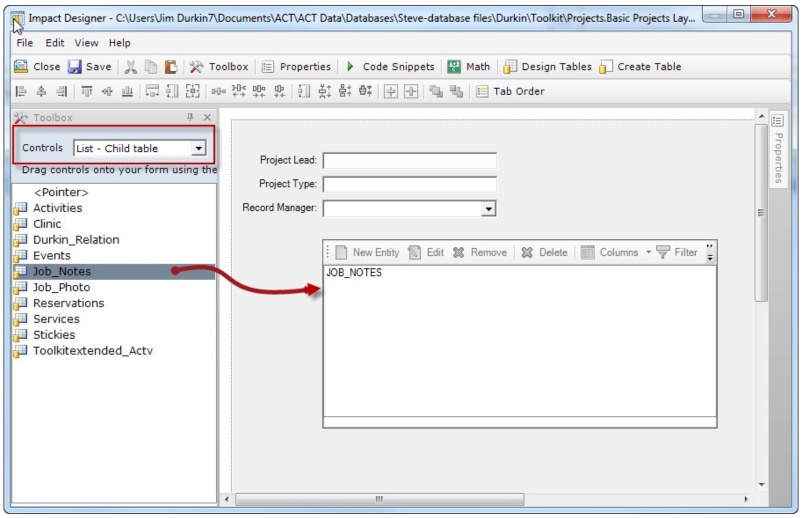
Adding a child table

To add a child table onto a parent table data-entry form please follow these steps:

1. Open the parent data-entry form
2. Change the Controls to "LIST - CHILD TABLES"
3. Drag your desired child table onto the layout
4. Click Save then close the designer



See also

Editing a data-entry form
Adding a new field
Add contact field onto the form
Add Parent field onto the form
Changing Fonts and colors
Scripting using Visual Basic

Properties

Article ID: adding_a_child_table
Views: 174
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:38 PM

Actions

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Scripting using Visual Basic

The button [dynamic] control accepts Visual Basic scripting to update fields, save fields and more. For more information go here Button [Dynamic]

See also

- Editing a data-entry form
- Adding a new field
- Add contact field onto the form
- Add Parent field onto the form
- Changing Fonts and colors
- Adding a child table

Properties

Article ID:	scripting_using_visual_ba
Views:	166
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:39 PM

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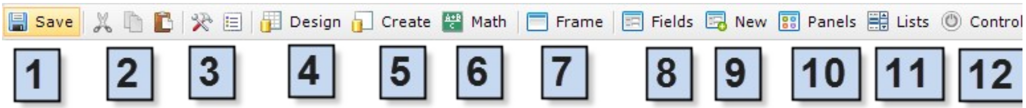
Toolbars

Below are the toolbars and what the items do



1. Save the form
2. Cut, copy & paste controls
3. Show or hide the properties or the toolbox
4. Add a new field
5. Add a new table
6. Show or hide the math at the bottom
7. Show the frame around the dataentry window
8. Show the Fields toolbox
9. Show the New Fields toolbox
10. Show the Panels toolbox
11. Show the Lists toolbox
12. Show the Controls toolbox
13. Show the Buttons toolbox

1. Align a group of controls horizontally to the left, center or right
2. Align a group of controls vertically to the top, center or bottom
3. Make controls the same width, height or both
4. Make the horizontal spacing between selected controls the same, increase the space, decrease the space or remove the space
5. Make the vertical spacing between selected controls the same, increase the space, decrease the space or remove the space
6. Center the selected controls vertically or horizontally
7. Brings a control to the top or pushes it to the back
8. Sets the tabbing order for the form. Click the menu item to start the the mode, click the controls in the order you want to set the tab and click the menu item again to end the mode.

See also

Fundamentals
Designer Surface
Toolbox Panel
Properties Panel
Math Functions Panel

Properties

Article ID: toolbar
Views: 197
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:39 PM

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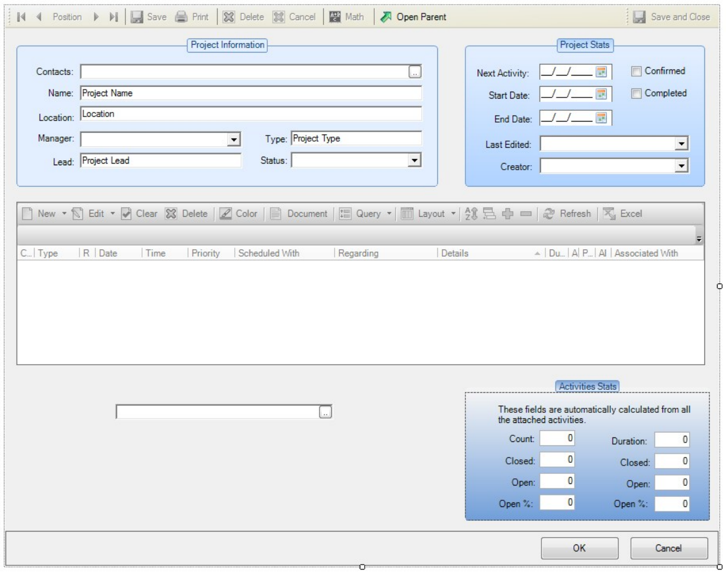
Designer Surface

This section display the controls and visual elements on the data-entry form. You drag controls onto the form and layout how the data entry screen will look.



See also

Fundamentals
Toolbars
Toolbox Panel
Properties Panel
Math Functions Panel

Properties

Article ID:	designer_surface
Views:	184
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:39 PM

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Toolbox Panel

This panel holds the controls which can be added onto the designer form. The controls are organized under eight sections. To display each section please use the drop down at the top of the toolbox panels.

1. Fields - Existing
2. Field - New
3. List - Child Tables
4. List - Parent Tables
5. Controls container
6. Controls Generic
7. Controls Specialized
8. Code Snippets

See also

Fundamentals
Toolbars
Designer Surface
Properties Panel
Math Functions Panel

Properties

Article ID: toolbox_panel
Views: 231
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:39 PM

Actions

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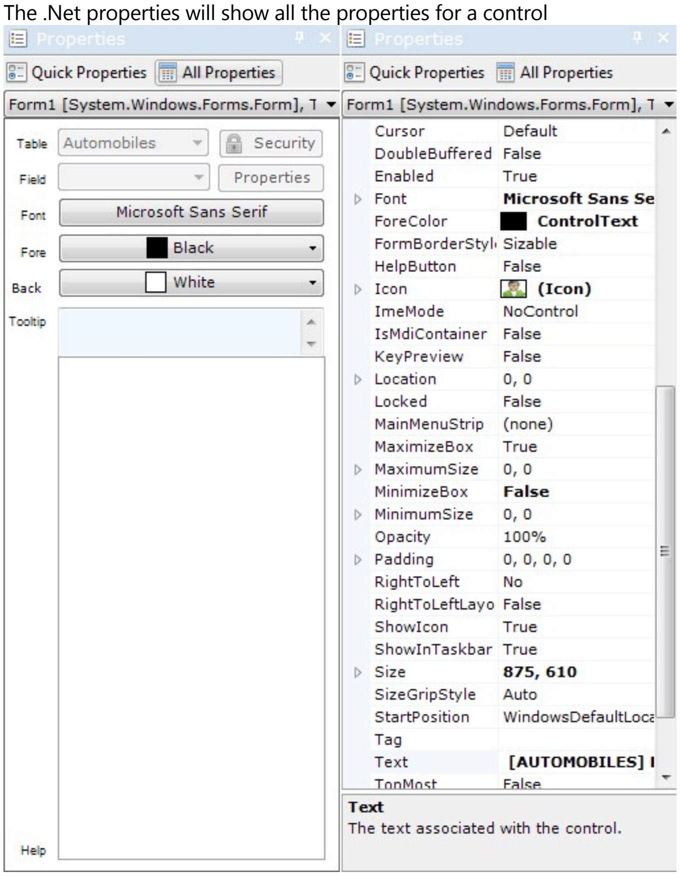
Properties Panel

The properties panel can be changed from it's default of quick properties to ACT! properties or .Net Properties.

The quick properties will display the basic and most changed properties for a control
The .Net properties will show all the properties for a control



See also

Fundamentals
Toolbars
Designer Surface
Toolbox Panel
Math Functions Panel

Properties

Article ID: properties_panel
Views: 198
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:39 PM

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Read Only Property

To add field security to a control follow these steps

1. Select the control
2. Select ReadOnly in the properties panel click the elipses button [...] in the property window
3. Check the "Make this field Read-Only..." box
4. Select the users and/or teams that can edit the field
5. Click the ok button

See also

Properties

Article ID: add_field_security
Views: 186
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:39 PM

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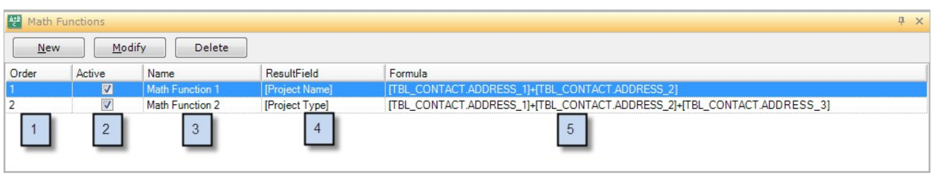
Math Functions Panel

The math function panel shows all of the math functions for a custom table, from this screen you can view and edit the functions. You can edit a math function by double clicking it or selecting it and clicking the modify button, for more information on editing a math function click here.



1. The order in which the math functions will be run
2. Weither the math function will be run
3. The name of the math function
4. The field the math function will return a value to
5. The fields that make up the function

See also

Fundamentals
Toolbars
Designer Surface
Toolbox Panel
Properties Panel

Properties

Article ID: math_functions_panel
Views: 195
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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Advanced Functions

On some controls there are function and properties which can change the behavior of the control. This section will document these advanced functions.

Auto-Select Tabs   Run Custom Compiled Code

See also

Tables
Define Fields and tables
Table Wizard
Forms Designer
Controls on Forms
Field Designer
Table Designer
Tab Order on Detail View

Properties

Article ID:	advanced_functions1
Views:	195
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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Auto-Select Tabs

You can add a tab control onto your form which is triggered by the user selecting a value from a drop down list.

1. Add a tab control onto your form
   1. Drag and drop the Tab Control from under the Controls - Container toolbox
   2. Click the Open Collection button in the properties panel
   3. Click the ADD button
   4. Change the (Name) property to the name in the drop down list you are going to attach below.When you run the form, tab pages will be automatically selected when the value of the drop down list changes and matches the name of tab name. In the example we are creating three tabs named:

- Residential
- Commercial
- New Construction

Properties

Article ID:	auto-select_tabs
Views:	182
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:40 PM

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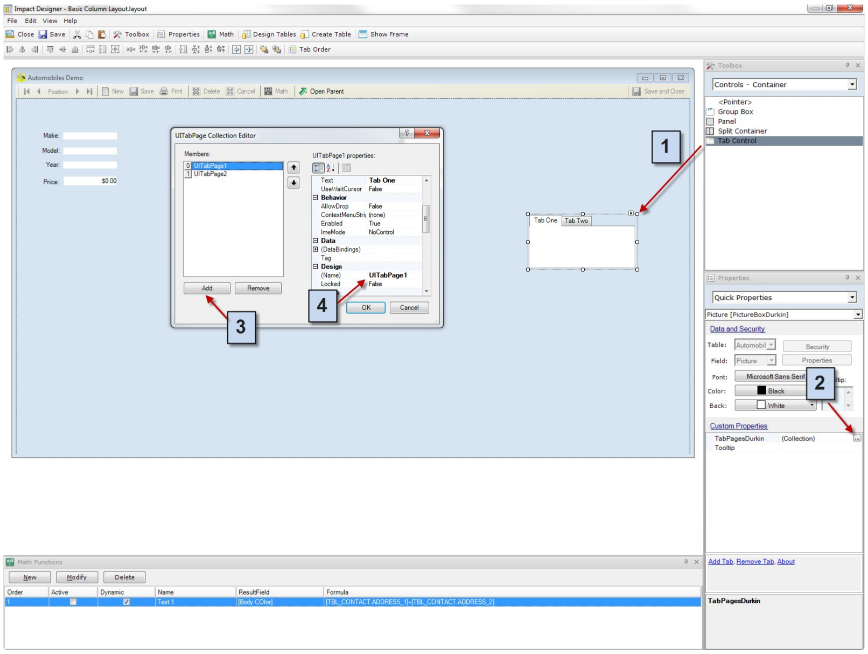
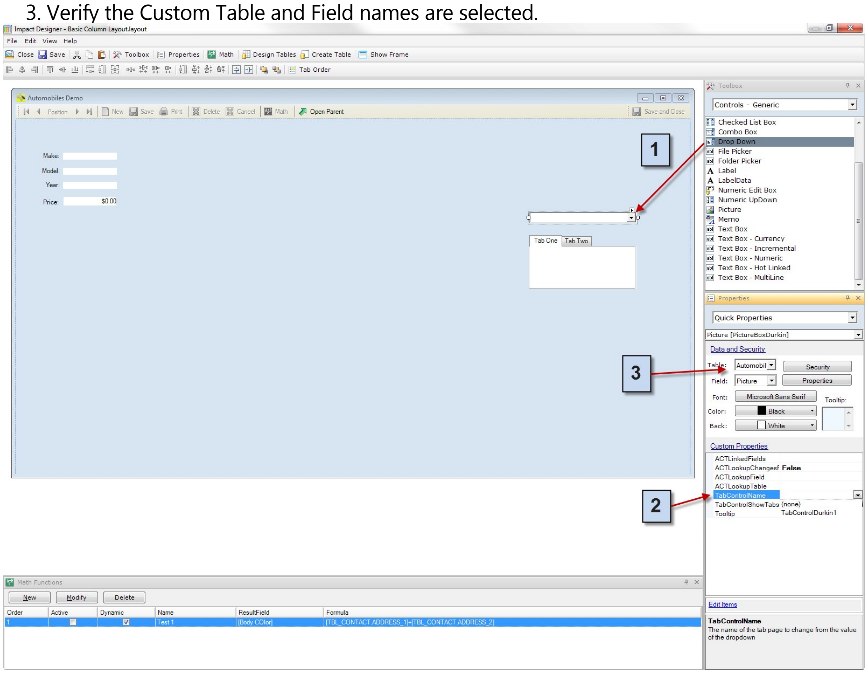


2. Add a Drop down control onto your form
   1. Drag and drop the Drop Down Lookup from under the Controls - Specialized toolbox
   2. Using the TabControlName property drop down select the tab control.
      You will see multiple tab control names if multiple tab controls are on the form
   3. Verify the Custom Table and Field names are selected.



Now you can save and close the form.

See also

Run Custom Compiled Code

Run Custom Compiled Code

With the release of **Impact 4.2 (build 117)** you can now run compiled custom code from the data-entry form button control. This code can be written in VisualBasic or VisualCSharp. You will need to build a DLL using Visual Studio 2008 or better.

Create the DLL
In the VS project create a new class as shown below and compile into a DLL.

```
Public Class SDKExample

     Public Shared Function RunCustomCode(ByVal form As
Durkin.Common.Classes.frmSubEntityItemEditDurkin) As Boolean

        System.Diagnostics.Debugger.Break()

        Return True

    End Function

End Class
```

Installing the DLL
To install your custom dll please follow these steps:

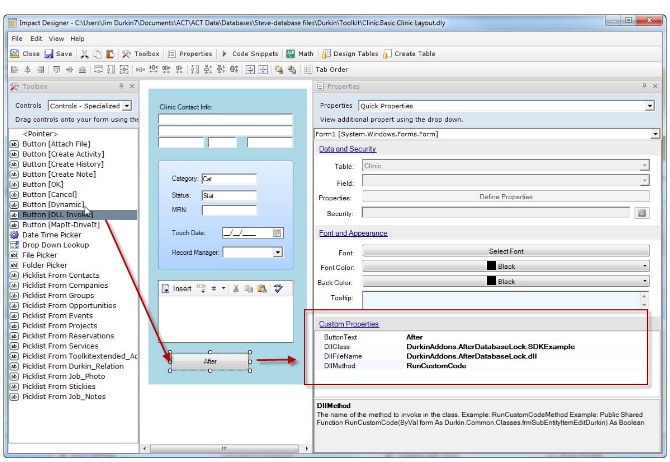
1. Close ACT!
2. Copy your DLL into the plugin folder
3. Restart ACT

The ACT plugin folder is either at one of these two locations:
C:\Program Files (x86)\ACT\Act for Windows\Plugins   (64 bit machine)
C:\Program Files\ACT\Act for Windows\Plugins (32 bit machines)

Calling the DLL code:
To call you custom code you need to add a button onto your form and set the buttons properties to match your; DLL Name, Class and method. Please follow these steps:

1. Open you form in the designer
2. Change the drop down at the top of the toolbox to "Controls - Specialized"
3. Drag the BUTTON [DLL INVOKE] onto your form

   On the 'Custom Properties' panel change these properties
4. Set the dllclass property to Durkin.Custom.RunCustomCode.SDKExample
5. Set the dllfilename property to Durkin.Custom.RunCustomCode.dll
6. Set the dllmethod property to RunCustomCode
7. Save and close the form.



Properties

Article ID:	run_custom_compiled_co
Views:	196
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:40 PM

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See also

Auto-Select Tabs

Controls on Forms

There are many standard and customized controls that can be used on custom table forms.

Exisiting Fields	Create Field	Parent-Child Lists	Panels and Container	Specialzied Controls	Buttons and Picklists
Cascading Dropdowns	Contact, Company, Group and Opps fields				

See also

Tables
Define Fields and tables
Table Wizard
Forms Designer
Advanced Functions
Field Designer
Table Designer
Tab Order on Detail View

Properties

Article ID: controls
Views: 188
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:40 PM

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Exisiting Fields

By selecting this drop down the toolbar just below the drop down will display a list of **all existing fields** in the current custom table which have not been placed onto the data-entry form.

See also

Create Field
Parent-Child Lists
Panels and Container
Specialzied Controls
Buttons and Picklists
Cascading Dropdowns
Contact, Company, Group and Opps fields

Properties

Article ID: fields_-_exisiting
Views: 164
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:40 PM

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Create Field

By selecting this drop down the toolbar just below the drop down will display a list of field types you can place on your data-entry form.

Add one of these fields will add the field into the custom table you are designing.

See also

Exisiting Fields
Parent-Child Lists
Panels and Container
Specialzied Controls
Buttons and Picklists
Cascading Dropdowns
Contact, Company, Group and Opps fields

Properties

Article ID: field_-_new
Views: 185
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:40 PM

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Parent-Child Lists

Selecting the Lists button in the Forms Designer toolbar will display a list of tables you can place on your data-entry form.

When one of these items are are places onto the form they list will be a child table or one of the top four tables in ACT; contact, company, groups and opportunities.

See also

Exisiting Fields
Create Field
Panels and Container
Specialzied Controls
Buttons and Picklists
Cascading Dropdowns
Contact, Company, Group and Opps fields

Properties

Article ID: list_-_child_tables
Views: 186
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:40 PM

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Panels and Container

Selecting the Panels button in the toolbar will display a list of container style controls you can place on your data-entry form.

Container controls are controls which hold multiple controls such as a panel or a tab control.

Group Box	Panel	Panel with Total Footer	Tab Control

See also

Exisiting Fields
Create Field
Parent-Child Lists
Specialzied Controls
Buttons and Picklists
Cascading Dropdowns
Contact, Company, Group and Opps fields

Properties

Article ID: controls_-_container
Views: 164
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:40 PM

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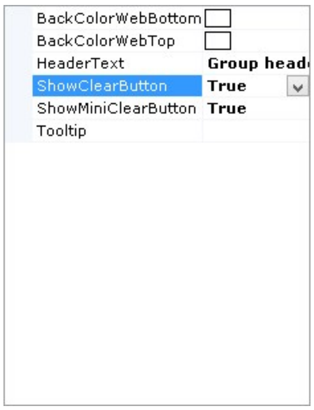
Group Box

The GroupBox displays a frame around a group of controls with or without a caption. Use a GroupBox to logically group a collection of controls on a form. The group box is a container control that can be used to define groups of controls.

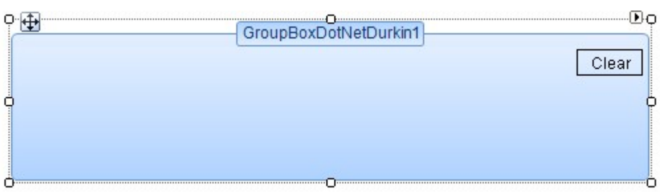
The typical use for a group box is to contain a logical group of RadioButton controls. If you have two group boxes, each of which contain several option buttons (also known as radio buttons), each group of buttons is mutually exclusive, setting one option value per group.

In 5.1 two new properties were added ShowClearButton and ShowMiniClearButton

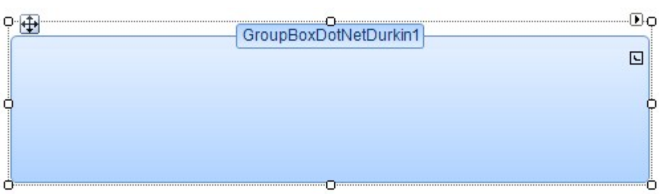
By default they are set to false



If ShowClearButton is set to true the groupbox will look like below the button will clear all the controls in the groupbox



If ShowMiniClearButton is set to true the groupbox will look like below the button will clear all the controls in the groupbox



See also

Panel
Panel with Total Footer
Tab Control

Properties

Article ID:	group_box
Views:	201
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:40 PM

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Home > Impact Suite > Tables and Forms > Controls on Forms > Panels and Container > Panel

Panel

A Panel is a control that contains other controls. You can use a Panel to group collections of controls such as a group of RadioButton controls. As with other container controls such as the GroupBox control, if the Panel control's enabled property is set to false, the controls contained within the Panel will also be disabled.

The Panel control is displayed by default without any borders. You can provide a standard or three-dimensional border using the border style property to distinguish the area of the panel from other areas on the form. Because the Panel control derives from the scrollable class, you can use the autoscroll property to enable scroll bars in the Panel control. When the autoscroll property is set to true, any controls located within the Panel (but outside of its visible region), can be scrolled to with the scroll bars provided.

The Panel control does not display a caption. If you need a control similar to a Panel that can display a caption, see the GroupBox control.

See also

Group Box
Panel with Total Footer
Tab Control

Properties

Article ID: panel1
Views: 187
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:40 PM

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Home > Impact Suite > Tables and Forms > Controls on Forms > Panels and Container > Panel with Total Footer

Panel with Total Footer

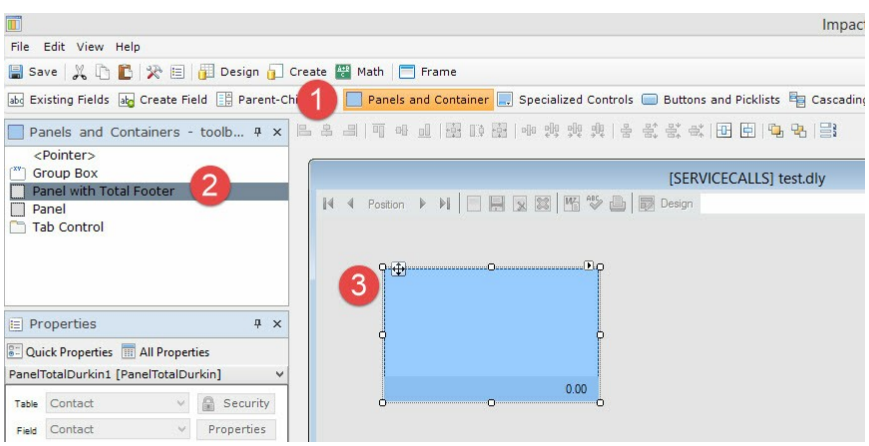
Home > Impact Suite > Tables and Forms > Controls on Forms > Panels and Container > Panel with Total Footer

Panel with Total Footer

This control will add up the number, decimal or currency fields you add into the panel and display the total amount in the footer.

To add this control onto a form follow these steps in the designer:

1. Click on the **Panels and Container** icon on the top toolbar
2. Select the **Panel with Total Footer**
3. Drag it onto your form



Once you have the panel on the form you can drag field into the panel by following these steps:

1. Click on the **Existing Fields** icon on the top toolbar
2. Select any numeric field from the list
3. Drag it into your panel

Properties

Article ID: panel_with_total_footer
Views: 180
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 12:31 PM

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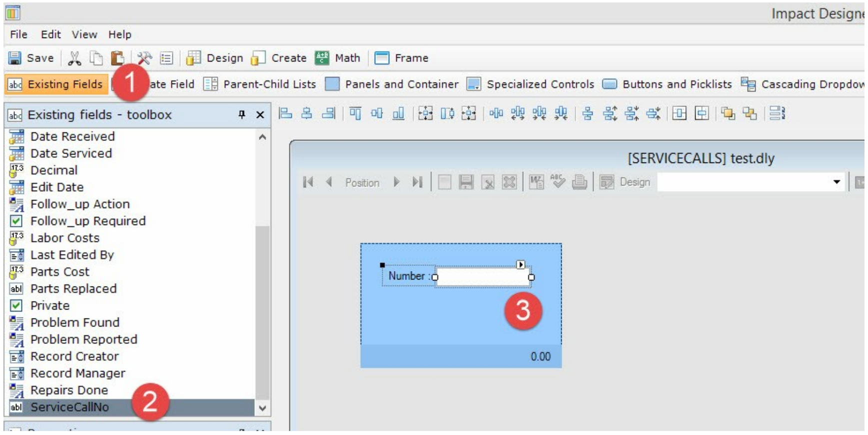


You can set the properties of the panel using the Properties area in the lower left corner. The properties include:

Border: The border around the panels
Show Clear Button: Is the CLEAR button visible. This button clears all the values for each field in the panel

Text : *Not used at this time*

Tooltip: The tooltip to display when the mouse hover over the panel.

Total Alignment: The alignment of the total value at the bottom of the panel

Total Format String: the formatting of the total value. c for currency, n for numeric

Total Target: This is the targeted total for the sum of all fields. When this total is under the target the total value will be RED. When this target value is met or exceeded the total value will be BLANK

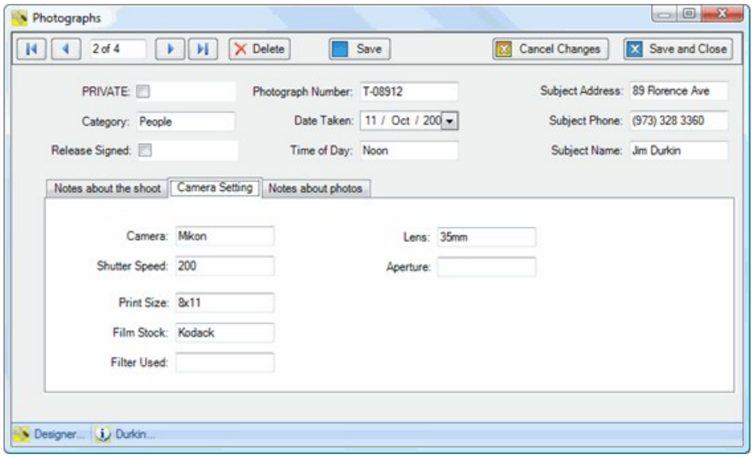
See also

Group Box
Panel
Tab Control

Tab Control

You can use tabs to help organize like information together. On the screen shot below we are grouping all the "Camera Settings" together under the second tab. To add multiple tabs onto your layout follow these steps:

1. Open a form in the DESIGNER
2. Click on the CUSTOM CONTROLS tab at the top left side of the window
3. DRAG the item "TabControlDurkin" onto the form.
4. Click the "ADD TAB" link at the bottom of the properties list for as many tabs as you desire.



To change Tabs settings like the label, follow these steps:

1. In the properties list select TABPAGES
2. Click the ellipses buton [...]
3. Click on the ADD button at the top of the window
4. In this list you can select TEXT to change the tabs label

And yes, you can have tabs inside of tabs. Unlimited child tabs are supported

See also

Group Box
Panel
Panel with Total Footer

Properties

Article ID: tab_control
Views: 194
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:41 PM

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Home > Impact Suite > Tables and Forms > Controls on Forms > Specialzied Controls

Specialzied Controls

By selecting this drop down the toolbar just below the drop down will display a list of **generic control** you can place on your data-entry form.

Generic controls are defined as controls which have not been attached to a specific field in the custom table. Once you drag one of these generic fields you will be presented with a dial to select the field from the custom table.

You can use these controls to place two controls attached to the same field. This may be handle if you want to see a field under two different tab or in two sections of the data-entry form. These two controls will sync with each otehr so when the value of one control changes the value of the second control is updated.

Auto Increment	Calendar Combo	Calendar Month	Check Box	Checked List Box	Combo Box
Drop Down	File Picker	Folder Picker	Label	LabelData	Numeric Edit Box
Numeric UpDown	Picture	Memo	Text Box	Text Box - Currency	Text Box - Incremental
Text Box - Numeric	Text Box - Hot Linked	Text Box - MultiLine			

See also

Exisiting Fields
Create Field
Parent-Child Lists
Panels and Container
Buttons and Picklists
Cascading Dropdowns
Contact, Company, Group and Opps fields

Properties

Article ID: controls_-_generic
Views: 160
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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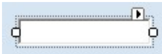
Home > Impact Suite > Tables and Forms > Controls on Forms > Specialzied Controls > Auto Increment

Auto Increment

This is a specialized control in the designer for auto-incrementing a field. This control is based on a text box and will automatically increment by one its value based on the highest previous value in the ACT! database. Any time you create a new item the value will auto-increment. If you open an existing item that was previously left blank then the value will auto-increment.

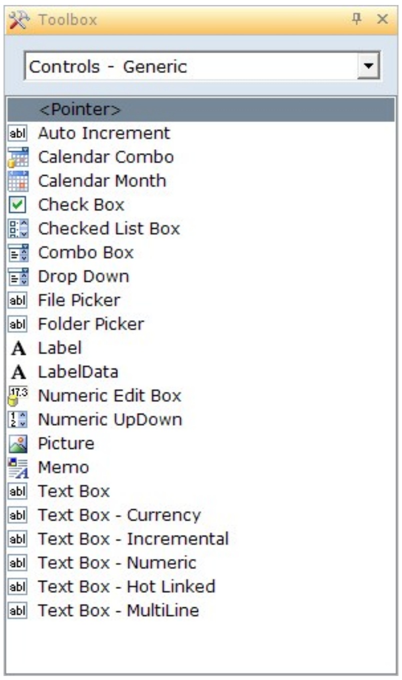
Properties

Article ID: auto_increment
Views: 239
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM



Follow these steps to add the auto-increment control onto the form.

1. Open the form in the Designer
2. Click on the Specialized Controls button in the toolbar.
3. Drag the item labeled Auto Increment onto the form
4. A Select field window will come forward choose the table name
5. Select the field to increment
6. Click on the OK button to save changes



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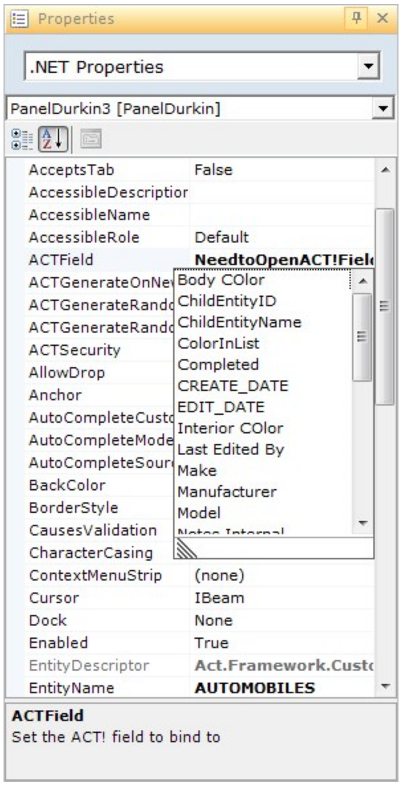


See also

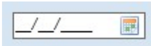
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Calendar Combo

Properties

Article ID: calendar_combo

The calendar combo control allows you to select a date and save it to an associated Act field.



Follow these steps to add the calendar combo control onto the form.

1. Open the form in the Designer
2. Click on the controls - generic drop down at the top left.
3. Drag the item labeled calendar combo onto the form
4. From the PROPERTIES window go to the ACTFIELD item.
5. Using the DropDown list select your desired ACT field.
6. Click on the SAVE button to save changes.

After you have the date control on the form you can set some of the default options such as:

Default Business Days
Count only business days when adding days tot he default date. (business days are always Mon-Fri)

Default Days to Add
Default the field to todays date plus x days

Default Months to Add
Default the field to todays date plus x month

Great options for when you are creating a service style ticket which needs to be followed up in the future

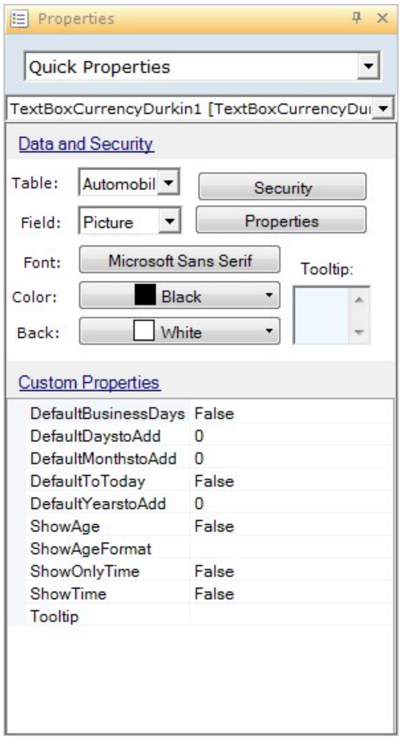
Default to Today
Default the field to today's date

Show Age
Show the age of the date field

Show Only Time
Hides the date and only show the time portion

Show Time
Show the time portion of the date time

Tooltip
Enter a tooltip to be displayed when the user hovers the moue over the control



See also

Auto Increment
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Calendar Month

The calendar combo control allows you to select a date from a month format control and save it to an associated Act field.

Follow these steps to add the calendar combo control onto the form.

1. Open the form in the Designer
2. Click on the controls - generic drop down at the top right.
3. Drag the item labeled Calendar Month onto the form
4. From the PROPERTIES window go to the ACTFIELD item.
5. Using the DropDown list select your desired ACT field.
6. Click on the SAVE button to save changes.

See also

Auto Increment
Calendar Combo
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID: calendar_month
Views: 227
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:41 PM

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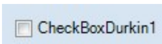
Check Box

Use a CheckBox to give the user an option, yes/no.



CheckBox and RadioButton controls have a similar function: they allow the user to choose from a list of options. CheckBox controls let the user pick a combination of options. In contrast, RadioButton controls allow a user to choose from mutually exclusive options.

The appearance property determines whether the CheckBox appears as a typical CheckBox or as a button.

The threestate property determines whether the control supports two or three states. Use the checked property to get or set the value of a two-state CheckBox control and use the checkstate property to get or set the value of a three-state CheckBox control.

See also

Auto Increment
Calendar Combo
Calendar Month
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID: check_box1
Views: 145
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:41 PM

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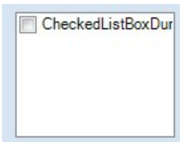
Checked List Box

The Checked ListBox control enables you to display a list of items to the user that the user can select by checking the box. A Checked ListBox control can provide one or multiple selections using the SelectionMode property. The Checked ListBox also provides the MultiColumn property to enable the display of items in columns instead of a straight vertical list of items. With this, the control can display more visible items and the user no longer needs to scroll to an item.



See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID: checked_list_box
Views: 176
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:41 PM

Actions

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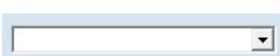
Combo Box

A ComboBox displays a text box combined with a ListBox, which enables the user to select items from the list or enter a new value. The combo box is used for a field associated with an ACT drop down list

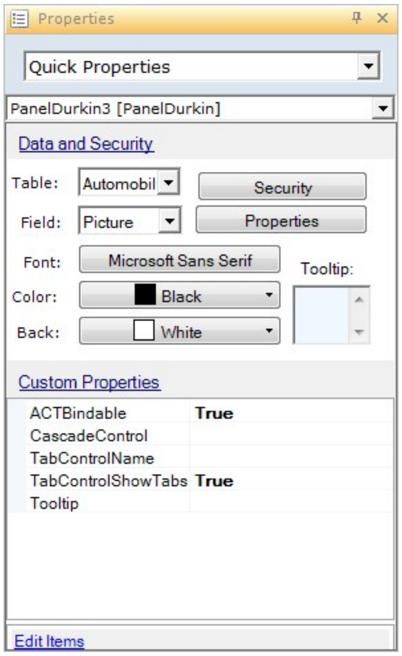


Set the field to an ACT field with a drop down list.

Properties

Article ID: combo_box
Views: 169
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:42 PM

Actions



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See also

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Check Box
Checked List Box
Drop Down
File Picker
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Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Drop Down

This control is no longer a separate control, it's properties have been incorporated into the generic Drop Down control.

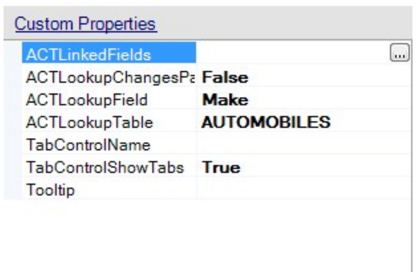
Properties

Article ID: drop_down_lookup
Views: 159
Created By: jimdurkin

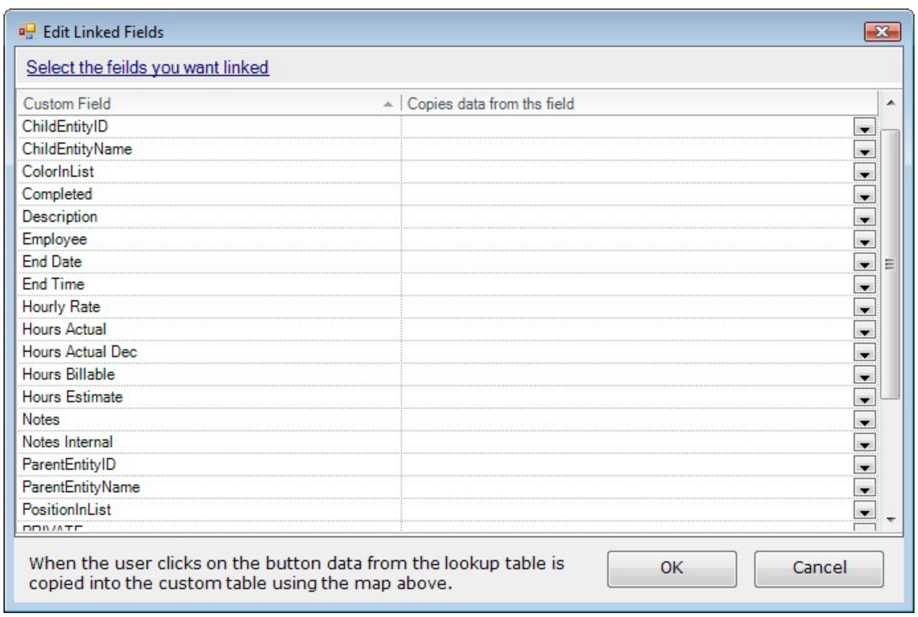
The drop down lookup control (also known as a PickList control) will create a drop down of distinct values from a custom tables field. Choosing a value form the drop down will copy selected fields from the custom table to the current record.

This control will replace the field value with the value from the drop down list. If you want to replace multiple fields at the same time please see the Pick List from [Custom Table] control.

To set up the control set the ACTLookupTable to the custom table to be looked up and the ACTLookupField to the Act field from the custom table.



Click the ellipses from ACTLinkedFields and choose the fields to copy from the custom table into the current record.



See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture

Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:42 PM

Actions

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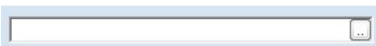
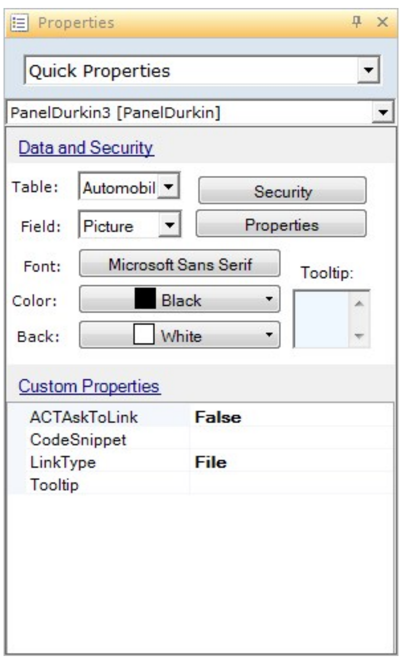
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

File Picker

The File Picker Control lets you pick a file and store it's path into an ACT Character Field. Clicking the elipses(...) button in the control will bring forward a open file dialog to choose the file.



ACTAskToLink
When set to true a window will ask if the file should be linked. If the answer is yes the file will also be attached to the parent contact, company, group or opportunity as a LNK file.



See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
Folder Picker
Label
LabelData

8+1 0 Tweet

Properties

Article ID: file_picker1
Views: 153
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:42 PM

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Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Folder Picker

The File Picker Control lets you pick a folder and store it's path into an ACT Character Field. Clicking the elipses(...) button in the control will bring forward a folder browser dialog to choose the folder.

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID:	folder_picker1
Views:	156
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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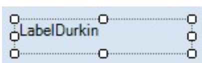
Home > Impact Suite > Tables and Forms > Controls on Forms > Specialzied Controls > Label

Label

Label controls are typically used to provide descriptive text for a control. For example, you can use a Label to add descriptive text for a TextBox control to inform the user about the type of data expected in the control. Label controls can also be used to add descriptive text to a Form to provide the user with helpful information. For example, you can add a Label to the top of a Form that provides instructions to the user on how to input data in the controls on the form. Label controls can be also used to display run time information on the status of an application. For example, you can add a Label control to a form to display the status of each file as a list of files is processed.

A Label participates in the tab order of a form, but does not receive focus (the next control in the tab order receives focus). For example, if the UseMnemonic property is set to true, and a mnemonic character—the first character after an ampersand (&)—is specified in the Text property of the control, when a user presses ALT+ the mnemonic key, focus moves to the next control in the tab order. This feature provides keyboard navigation for a form. In addition to displaying text, the Label control can also display an image using the Image property, or a combination of the ImageIndex and ImageList properties.



See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID: label1
Views: 163
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:42 PM

Actions

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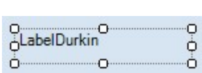
Home > Impact Suite > Tables and Forms > Controls on Forms > Specialzied Controls > LabelData

LabelData

LabelData controls are typically used to display field information but not allow the user to change that information. For example, the LabelData could show the results of a math calculation that should not be changed or information form the contact that the record is attached to.



The format of the label can be set from the FormatString property

Properties

Article ID: labeldata
Views: 165
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:42 PM

Actions

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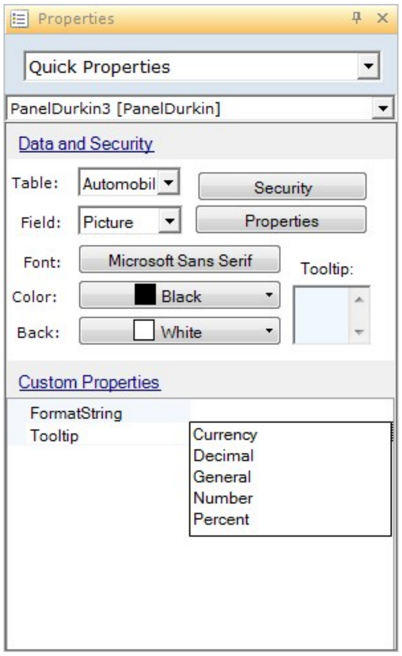

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
Numeric Edit Box
Numeric UpDown
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Text Box - Currency
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Text Box - Hot Linked
Text Box - MultiLine

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Numeric Edit Box

The Numeric Edit Box control is build off of the standard Microsoft .Net control. The properties for the standard control can be found here http://msdn.microsoft.com/en-us/library/system.windows.controls.textbox.aspx. It is customized to have a ValueType of Decimal, this control is ideal for using with numbers, decimals and currency.

The added properties for the control are ACTField, ACTSecurity and EntityName.

ACTField is the field that the control will save to
ACTSecurity is the field where the control can be made non editable based on users or teams. To learn more about adding security to controls go here Add Field Security .
EntityName is the name of the table that the ACTField is coming form

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID:	numeric_edit_box
Views:	170
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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Actions

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Numeric UpDown

This opening paragraph should describe the feature that you are documenting. Explain how it is commonly used and what the benefits are. For example: The Widget Master email link allows you to easily send information about each widget to various departments within your company. Often, the feature that you are documenting can be best explained by walking the reader through step by step. Use screenshots to illustrate the steps where possible.

1. Start the application by...
2. On the startup screen, click the...
3.

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID:	numeric_updown
Views:	196
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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Actions

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Picture

This opening paragraph should describe the feature that you are documenting. Explain how it is commonly used and what the benefits are. For example: The Widget Master email link allows you to easily send information about each widget to various departments within your company. Often, the feature that you are documenting can be best explained by walking the reader through step by step. Use screenshots to illustrate the steps where possible.

1. Start the application by...
2. On the startup screen, click the...
3.

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
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Numeric Edit Box
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Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID:	picture
Views:	181
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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Memo

This opening paragraph should describe the feature that you are documenting. Explain how it is commonly used and what the benefits are. For example: The Widget Master email link allows you to easily send information about each widget to various departments within your company. Often, the feature that you are documenting can be best explained by walking the reader through step by step. Use screenshots to illustrate the steps where possible.

1. Start the application by...
2. On the startup screen, click the...
3.

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID: memo
Views: 175
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:43 PM

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Text Box

The text box control is build off of the standard Microsoft .Net control. The properties for the standard control can be found here http://msdn.microsoft.com/en-us/library/system.windows.controls.textbox.aspx.

The added properties for the control are ACTField, ACTSecurity and EntityName.

ACTField is the field that the control will save to
ACTSecurity is the field where the control can be made non editable based on users or teams. To learn more about adding security to controls go here Add Field Security .
EntityName is the name of the table that the ACTField is coming form

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID: text_box
Views: 152
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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Text Box - Currency

The text box control is build off of the standard Microsoft .Net control. The properties for the standard control can be found here http://msdn.microsoft.com/en-us/library/system.windows.controls.textbox.aspx. It is customized to have a ValueType of Decimal, this control is ideal for using with currency fields.

The added properties for the control are ACTField, ACTSecurity and EntityName.

ACTField is the field that the control will save to
ACTSecurity is the field where the control can be made non editable based on users or teams. To learn more about adding security to controls go here Add Field Security .
EntityName is the name of the table that the ACTField is coming form

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
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Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
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Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID:	text_box_-_currency
Views:	165
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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Text Box - Incremental

The text box control is build off of the standard Microsoft .Net control. The properties for the standard control can be found here http://msdn.microsoft.com/en-us/library/system.windows.controls.textbox.aspx.

The added properties for the control are ACTField, ACTSecurity and EntityName.

ACTField is the field that the control will save to
ACTSecurity is the field where the control can be made non editable based on users or teams. To learn more about adding security to controls go here Add Field Security .
EntityName is the name of the table that the ACTField is coming form

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
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Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
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Picture
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Text Box - Currency
Text Box - Numeric
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID: text_box_-_incremental
Views: 145
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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Text Box - Numeric

The text box control is build off of the standard Microsoft .Net control. The properties for the standard control can be found here http://msdn.microsoft.com/en-us/library/system.windows.controls.textbox.aspx. It is customized to have a ValueType of Decimal, this control is ideal for using with number fields.

The added properties for the control are ACTField, ACTSecurity and EntityName.

ACTField is the field that the control will save to
ACTSecurity is the field where the control can be made non editable based on users or teams. To learn more about adding security to controls go here Add Field Security .
EntityName is the name of the table that the ACTField is coming form

See also

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Calendar Combo
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Check Box
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Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
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Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Hot Linked
Text Box - MultiLine

Properties

Article ID: text_box_-_numeric
Views: 160
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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Text Box - Hot Linked

The text box control is build off of the standard Microsoft .Net control. The properties for the standard control can be found here http://msdn.microsoft.com/en-us/library/system.windows.controls.textbox.aspx.

The added properties for the control are ACTField, ACTSecurity and EntityName.

ACTField is the field that the control will save to
ACTSecurity is the field where the control can be made non editable based on users or teams. To learn more about adding security to controls go here Add Field Security .
EntityName is the name of the table that the ACTField is coming form

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
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Drop Down
File Picker
Folder Picker
Label
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Numeric Edit Box
Numeric UpDown
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Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - MultiLine

Properties

Article ID:	text_box_-_hot_linked
Views:	158
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
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Text Box - MultiLine

The text box control is build off of the standard Microsoft .Net control. The properties for the standard control can be found here http://msdn.microsoft.com/en-us/library/system.windows.controls.textbox.aspx.

The added properties for the control are ACTField, ACTSecurity and EntityName.

ACTField is the field that the control will save to
ACTSecurity is the field where the control can be made non editable based on users or teams. To learn more about adding security to controls go here Add Field Security .
EntityName is the name of the table that the ACTField is coming form

See also

Auto Increment
Calendar Combo
Calendar Month
Check Box
Checked List Box
Combo Box
Drop Down
File Picker
Folder Picker
Label
LabelData
Numeric Edit Box
Numeric UpDown
Picture
Memo
Text Box
Text Box - Currency
Text Box - Incremental
Text Box - Numeric
Text Box - Hot Linked

Properties

Article ID: text_box_-_multiline
Views: 190
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
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Buttons and Picklists

By selecting this drop down the toolbar just below the drop down will display a list of **specialized controls** you can place on your data-entry form.

Specialized controls including:

- Multi-purpose buttons which run code snippets.
- Field and folder pickers
- Pick list from other custom table sources

Button [Attach File]	Button [Create Activity]	Button [Create History]	Button [Create Note]	Button [OK]	Button [Cancel]
Button [DLL Invoke]	Button [MapIt-DriveIt]	Picklist From Contacts	Picklist From Companies	Picklist From Groups	Picklist From Opportunities
Picklist From [Custom Table]					

See also

Exisiting Fields
Create Field
Parent-Child Lists
Panels and Container
Specialzied Controls
Cascading Dropdowns
Contact, Company, Group and Opps fields

Properties

Article ID: controls_-_specialized
Views: 180
Created By: jimdurkin
Modified By: [Modified By]
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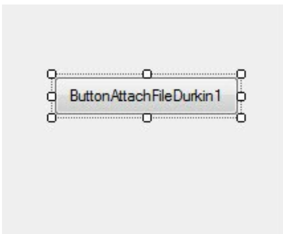
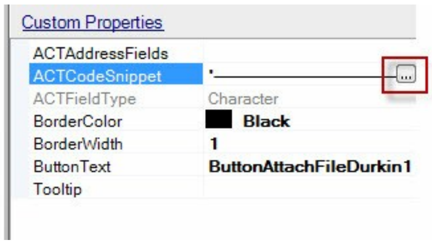
Button [Attach File]

The button attach file control adds a button with that will add a file to the history of the attached contact. When clicked on a form the button will open a window to select the file to attach and then attach that file.





The default code in the control is

```
'---------------------------------------------------
' Attach a file
'---------------------------------------------------
 HostApplication.UIHistoryManager.AttachFile()
```

To change the default code, click the ellipses (...) button in the properties panel, change the code and click save.

See also

- Button [Create Activity]
- Button [Create History]
- Button [Create Note]
- Button [OK]
- Button [Cancel]
- Button [DLL Invoke]
- Button [MapIt-DriveIt]
- Picklist From Contacts
- Picklist From Companies
- Picklist From Groups
- Picklist From Opportunities
- Picklist From [Custom Table]

Properties

Article ID:	button__attach_file_
Views:	172
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:44 PM

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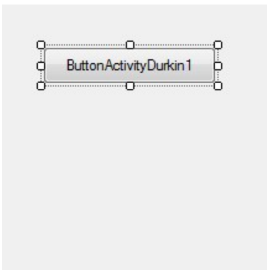
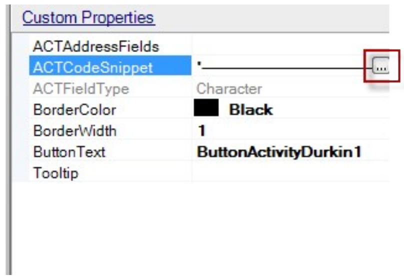
Button [Create Activity]

The button create activity control will bring forward the the schedule activity window from ACT.





The default code is

```
'--------------------------------------------------
' Attach a file
'--------------------------------------------------
 Dim aActivityType As ACT.Framework.Activities.ActivityType = HostFramework.Activities.GetActivityType(0)
HostApplication.UIActivityManager.ScheduleNewActivity(aActivityType)
```

To change the default code, click the ellipses (...) button in the properties panel, change the code and click save.

See also

Button [Attach File]
Button [Create History]
Button [Create Note]
Button [OK]
Button [Cancel]
Button [DLL Invoke]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Companies
Picklist From Groups
Picklist From Opportunities
Picklist From [Custom Table]

Properties

Article ID: button__create_activity_
Views: 139
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:44 PM

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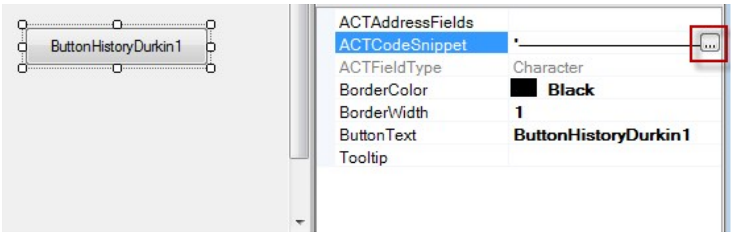
Button [Create History]

The create history button control will create a history for the contact when pressed



The default for the button is

```
'--------------------------------------------------
' Create a new history
'--------------------------------------------------
HostApplication.UIHistoryManager.RecordHistory()
```

To change the default code, click the ellipses (...) button in the properties panel, change the code and click save.

See also

Button [Attach File]
Button [Create Activity]
Button [Create Note]
Button [OK]
Button [Cancel]
Button [DLL Invoke]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Companies
Picklist From Groups
Picklist From Opportunities
Picklist From [Custom Table]

Properties

Article ID: button__create_history_
Views: 132
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:44 PM

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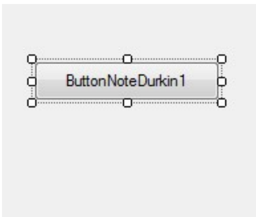
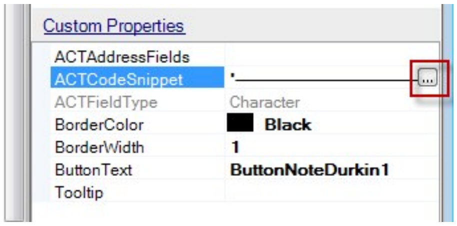
Button [Create Note]

The create note button control will bring forward note creation window for the contact when pressed





The default for the button is

```
'--------------------------------------------------
' Create a new note
'--------------------------------------------------
HostApplication.UINoteManager.InsertNote()
```

To change the default code, click the ellipses (...) button in the properties panel, change the code and click save.

See also

Button [Attach File]
Button [Create Activity]
Button [Create History]
Button [OK]
Button [Cancel]
Button [DLL Invoke]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Companies
Picklist From Groups
Picklist From Opportunities
Picklist From [Custom Table]

Properties

Article ID: button__create_note_
Views: 136
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:44 PM

Actions

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Button [OK]

The button ok control will place a button on the form that will save and close the form when pressed

See also

Button [Attach File]
Button [Create Activity]
Button [Create History]
Button [Create Note]
Button [Cancel]
Button [DLL Invoke]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Companies
Picklist From Groups
Picklist From Opportunities
Picklist From [Custom Table]

Properties

Article ID: button__ok_
Views: 134
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:44 PM

Actions

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Button [Cancel]

The button cancel control will place a button on the form that will cancel and close the form when pressed

See also

Button [Attach File]
Button [Create Activity]
Button [Create History]
Button [Create Note]
Button [OK]
Button [DLL Invoke]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Companies
Picklist From Groups
Picklist From Opportunities
Picklist From [Custom Table]

Properties

Article ID: button__cancel_
Views: 134
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:44 PM

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Home > Impact Suite > Tables and Forms > Controls on Forms > Buttons and Picklists > Button [DLL Invoke]

Button [DLL Invoke]

The button dynamic dll control will when clicked call an outside dll to be run

See also

Button [Attach File]
Button [Create Activity]
Button [Create History]
Button [Create Note]
Button [OK]
Button [Cancel]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Companies
Picklist From Groups
Picklist From Opportunities
Picklist From [Custom Table]

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Properties

Article ID: button__dynamic_dll_
Views: 137
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:45 PM

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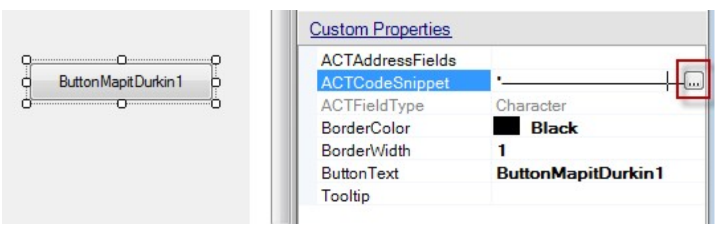
Home > Impact Suite > Tables and Forms > Controls on Forms > Buttons and Picklists > Button [MapIt-DriveIt]

Button [MapIt-DriveIt]

The button map it drive it control will bring forward a screen when clicked to get directions between two locations. Directions for map it drive it can be found here.



To change the default code, click the ellipses (...) button in the properties panel, change the code and click save.

The default code for the button is

```
'-------------------------------------------------
' Get the form the user is working on
'-------------------------------------------------
Dim EntityForm as Durkin.Common.Classes.frmSubEntityItemEditDurkin
EntityForm  = directCast(SubEntityForm, Durkin.Common.Classes.frmSubEntityItemEditDurkin)

'-------------------------------------------------
' Get the STARTING point contact
'-------------------------------------------------

'-------------------------------------------------
' My record
'-------------------------------------------------
'Dim StartContact as Act.Framework.Contacts.Contact = HostApplication.ActFramework.Contacts.GetMyRecord()

'-------------------------------------------------
' First contact atached to the record
'-------------------------------------------------
Dim StartContact as Act.Framework.Contacts.Contact = EntityForm.GetEntityItem().GetContacts(nothing)(0)

'-------------------------------------------------
```

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Properties

Article ID: button__mapit-driveit_
Views: 130
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:45 PM

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```
' Get the FROM addresses from the STARTING CONTACT
'--------------------------------------------------
Dim fAddress As String = Contacts.GetContactFieldDescriptorByANY(HostFramework, "Address 1").GetValue(StartContact )
Dim fCity As String = Contacts.GetContactFieldDescriptorByANY(HostFramework,
"TBL_CONTACT.BUSINESS_CITY").GetValue(StartContact )
Dim fState As String = Contacts.GetContactFieldDescriptorByANY(HostFramework,
"TBL_CONTACT.BUSINESS_STATE").GetValue(StartContact )
Dim fPostal As String =Contacts.GetContactFieldDescriptorByANY(HostFramework,
"TBL_CONTACT.BUSINESS_POSTALCODE").GetValue(StartContact )
Dim fCountry As String = Contacts.GetContactFieldDescriptorByANY(HostFramework,
"TBL_CONTACT.BUSINESS_COUNTRYNAME").GetValue(StartContact )

'--------------------------------------------------
' Get the DESTINATION addresses from the current record
'--------------------------------------------------
Dim dAddress As String = CustomSubEntity.GetFieldDescriptorByANY("Destination Address",
EntityForm.GetEntityManager()).GetValue(EntityForm.GetEntityItem())
Dim dCity As String = CustomSubEntity.GetFieldDescriptorByANY("Destination City",
EntityForm.GetEntityManager()).GetValue(EntityForm.GetEntityItem())
Dim dState As String = CustomSubEntity.GetFieldDescriptorByANY("Destination State",
EntityForm.GetEntityManager()).GetValue(EntityForm.GetEntityItem())
Dim dPostal As String = CustomSubEntity.GetFieldDescriptorByANY("Destination Postal",
EntityForm.GetEntityManager()).GetValue(EntityForm.GetEntityItem())
Dim dCountry As String = CustomSubEntity.GetFieldDescriptorByANY("Destination Country",
EntityForm.GetEntityManager()).GetValue(EntityForm.GetEntityItem())

'--------------------------------------------------
' Send the information to Google Maps
'--------------------------------------------------
Dim MapIt As New Durkin.Common.Views.frmMapit(fAddress , fCity , fState , fPostal , fCountry , dAddress , dCity , dState , dPostal ,
dCountry )
MapIt.Show()
```

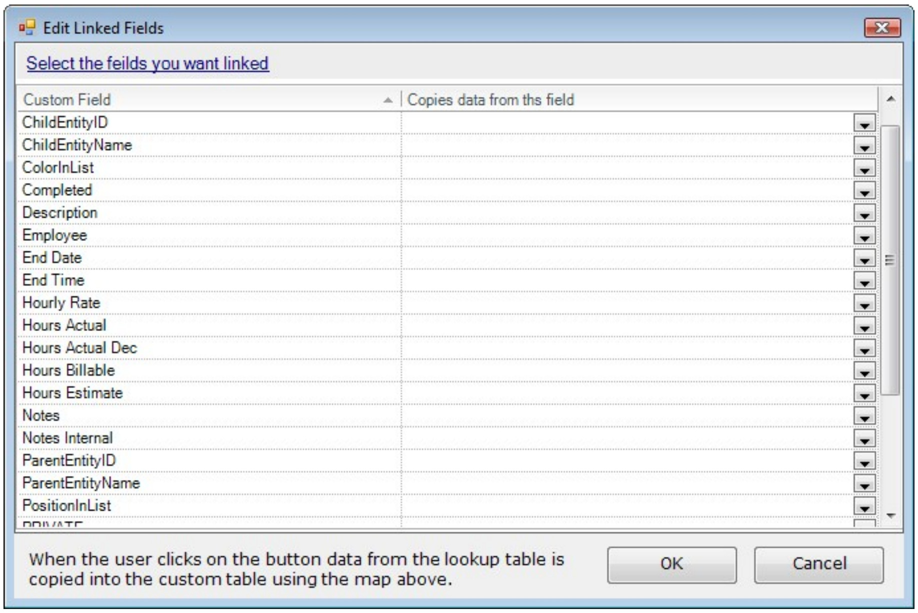
See also

Button [Attach File]
Button [Create Activity]
Button [Create History]
Button [Create Note]
Button [OK]
Button [Cancel]
Button [DLL Invoke]
Picklist From Contacts
Picklist From Companies
Picklist From Groups
Picklist From Opportunities
Picklist From [Custom Table]

Picklist From Contacts

The picklist from contacts control will bring forward a window to select select a contact and copy chosen fields from the contact table to the current custom table.

To setup the control you need to set the fields that are copied in the properties



See also

- Button [Attach File]
- Button [Create Activity]
- Button [Create History]
- Button [Create Note]
- Button [OK]
- Button [Cancel]
- Button [DLL Invoke]
- Button [MapIt-DriveIt]
- Picklist From Companies
- Picklist From Groups
- Picklist From Opportunities
- Picklist From [Custom Table]

Properties

Article ID:	picklist_from_contacts
Views:	152
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:45 PM

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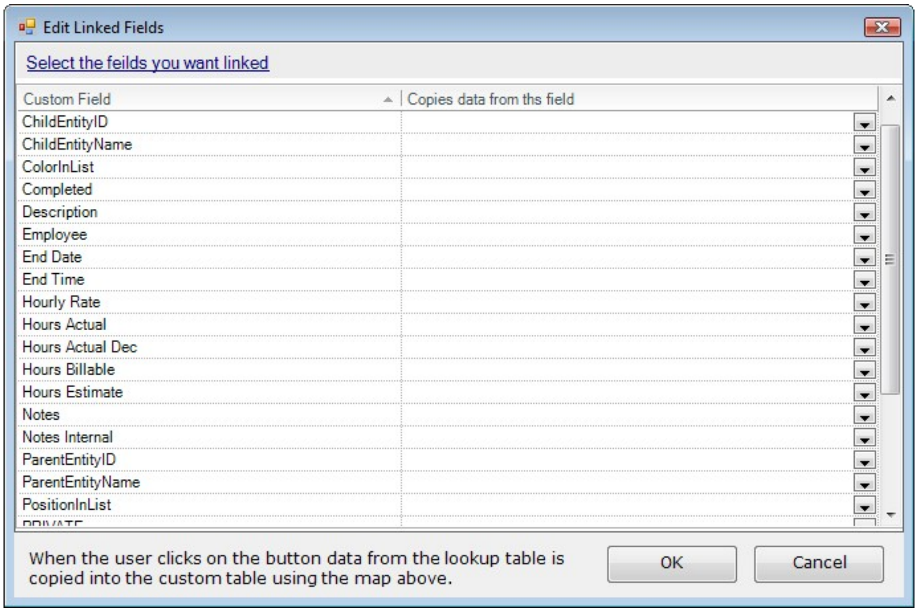
Picklist From Companies

The picklist from companies control will bring forward a window to select select a company and copy chosen fields from the company table to the current custom table.

To setup the control you need to set the fields that are copied in the properties



See also

Button [Attach File]
Button [Create Activity]
Button [Create History]
Button [Create Note]
Button [OK]
Button [Cancel]
Button [DLL Invoke]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Groups
Picklist From Opportunities
Picklist From [Custom Table]

Properties

Article ID: picklist_from_companies
Views: 130
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:45 PM

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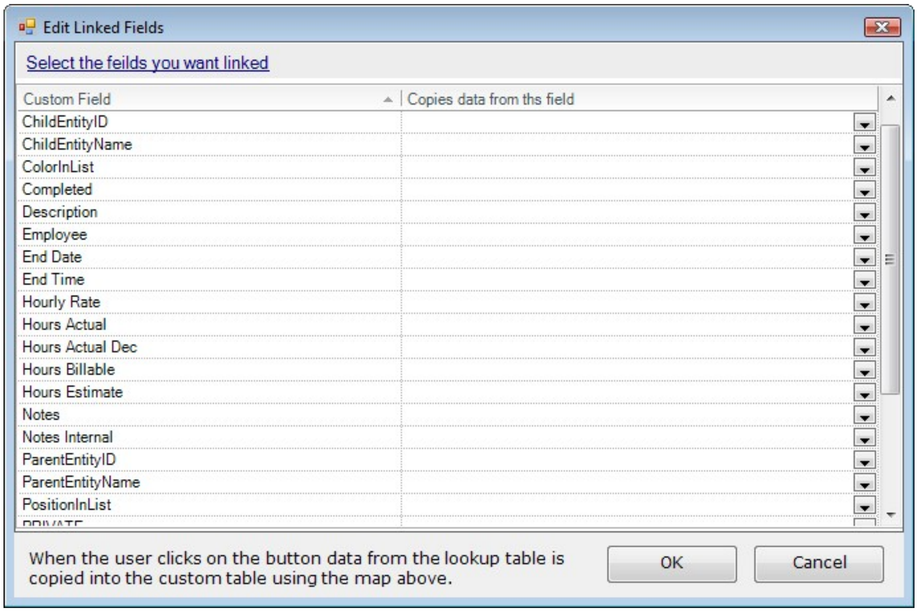
Picklist From Groups

The picklist from groups control will bring forward a window to select select a group and copy chosen fields from the group table to the current custom table.

To setup the control you need to set the fields that are copied in the properties



See also

Button [Attach File]
Button [Create Activity]
Button [Create History]
Button [Create Note]
Button [OK]
Button [Cancel]
Button [DLL Invoke]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Companies
Picklist From Opportunities
Picklist From [Custom Table]

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Properties

Article ID:	picklist_from_groups
Views:	138
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:45 PM

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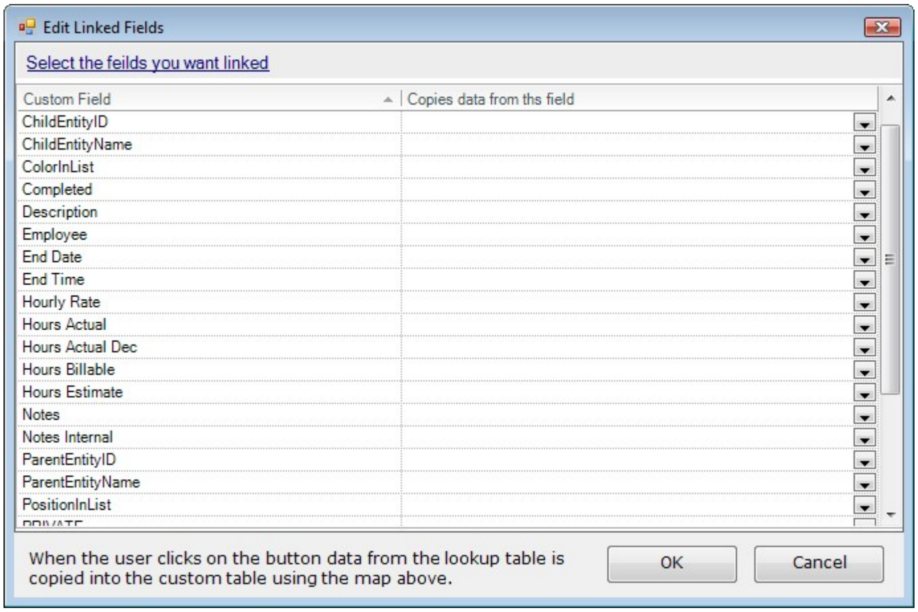
Home > Impact Suite > Tables and Forms > Controls on Forms > Buttons and Picklists > Picklist From Opportunities

Picklist From Opportunities

The picklist from opportunities control will bring forward a window to select select an opportunity and copy chosen fields from the opportunity table to the current custom table.

To setup the control you need to set the fields that are copied in the properties



See also

Button [Attach File]
Button [Create Activity]
Button [Create History]
Button [Create Note]
Button [OK]
Button [Cancel]
Button [DLL Invoke]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Companies
Picklist From Groups
Picklist From [Custom Table]

Properties

Article ID: picklist_from_opportuniti
Views: 149
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:45 PM

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Home > Impact Suite > Tables and Forms > Controls on Forms > Buttons and Picklists > Picklist From [Custom Table]

Picklist From [Custom Table]

The pick list from [custom table] (aka cascade drop down) control will bring forward a window to select select an record from a custom table and copy multiple values into multiple fields from the that table to the current custom table.

This control is much like a cascading pick list where each subsequent field filters down the next field. For instance; you need three drop downs such as make, model and version. First you need to create a custom table to store the values. These values will be stored in fields named make model and version. Using the interface of the 'Automobiles' table you can either import or data-enter your values such as VW, Fords, Chevy and so forth.

Properties

Article ID: picklist_from__custom_ta
Views: 137
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:46 PM

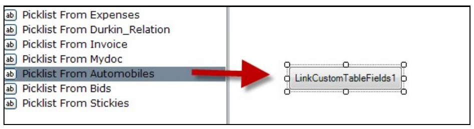
To import records into the master list, the best way would be to use the single import. You can find more information here.

This control will replace multiple field values with the value from the drop down list. If you want to replace just a single fields please see the Drop Down Lookup

To use this control follow these steps.
1) Open the form in the forms designer

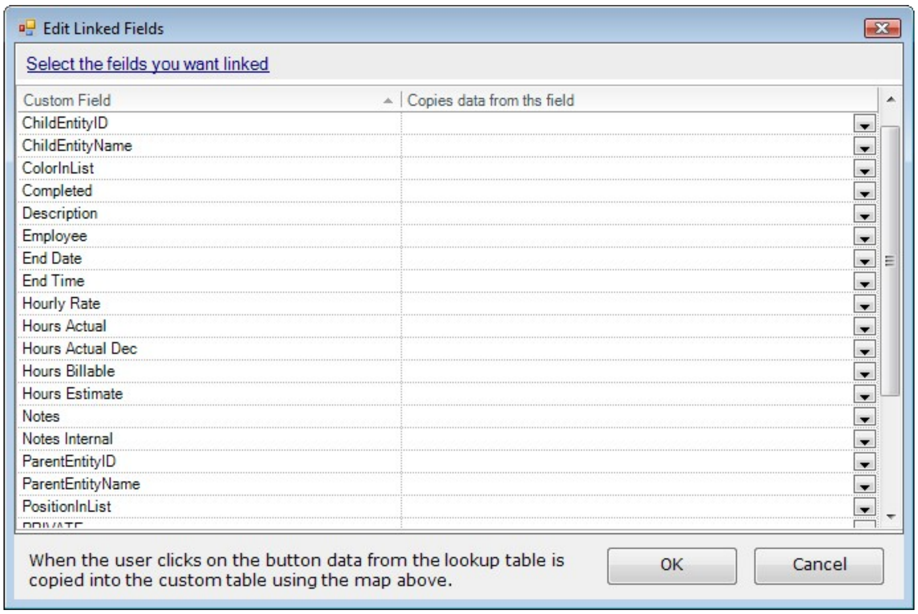
2) Click the "**Buttons**" button in the toolbar

3) Drag the "**Picklits from xxxxx**" controls onto the form. (Where **xxxxx** is the custom table to want to use as the pick list data source)



4) This **Edit Linked Fields** form will automatically pop open. You need to use the drop downs to match the fields from the pick list table (source) into your fields in the custom table you are currently editing (destination)

To setup the control you need to set the fields that are copied in the properties



You can set the text on the button by changing the Button text Property

The next time you use the form you now have a Pick List button. If you click on this button it will open a window listing all the available entries in the source table.

1) Enter **lookup criteria** using the the (1) global find which filters all the visible columns.

2) Enter filter criteria at the top of each column

Click OK when you have completed your look-up.

Actions

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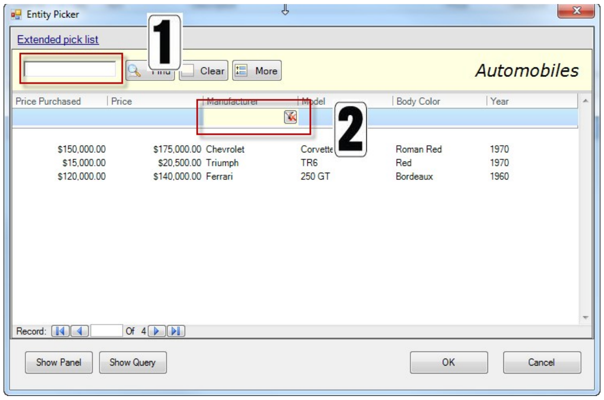


The selected record form the Automobile table is used to populate all the fields in your custom table.

cascade dropdown, cascading drop down, cascading dropdown

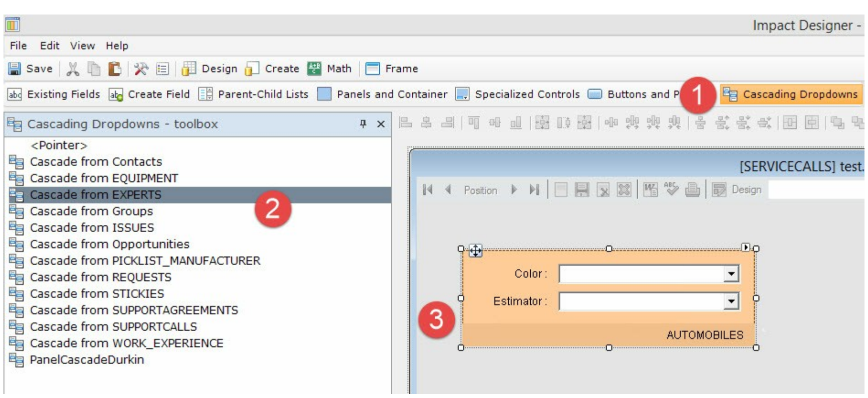
See also

Button [Attach File]
Button [Create Activity]
Button [Create History]
Button [Create Note]
Button [OK]
Button [Cancel]
Button [DLL Invoke]
Button [MapIt-DriveIt]
Picklist From Contacts
Picklist From Companies
Picklist From Groups
Picklist From Opportunities

Cascading Dropdowns

Cascading drop downs let you pick fields to narrow down entries from another table and insert those fields into the current table. This works well for picking make and model for cars or an item that is sold by a company.

1. In the designer click on the **Cascading Dropdowns** button in the toolbar
2. Drag over the control '**Cascade from [table name]**' that is the table you want to select from
3. A window will allow you to select the fields from the source table and pick what fields to put them in on the current table



Properties

Article ID: cascading_dropdowns
Views: 197
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:46 PM

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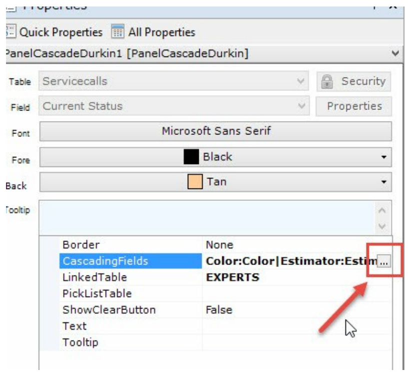
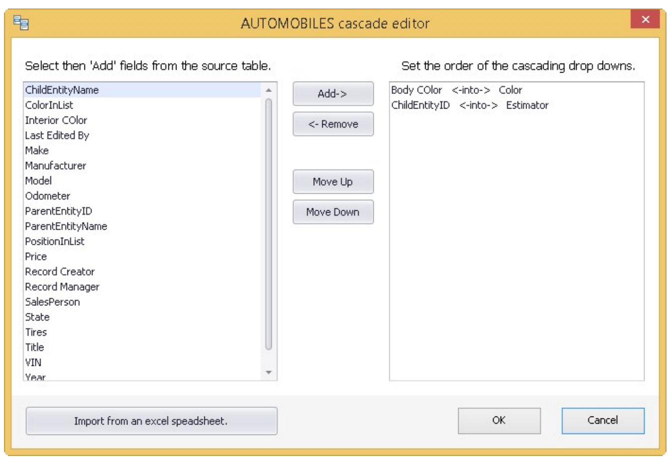
If you need to re-open the cascade editor please click on the "..." ellipse button next the the CascadingField property in the lower left side



The cascade editor allows you to select the fields to add onto the cascading control. The list on the left side is the frilds from the source table. The fields on the fight are the destination fields in the current custom table. To add fields follow these steps:

1. Select a field from the source table
2. Click on the ADD-> button
3. From the popup form select the destination field and click OK



In the list above the "**Body Color"** field form the source will be copied **<into>** the "**Color**" field in the current custom table.

See also

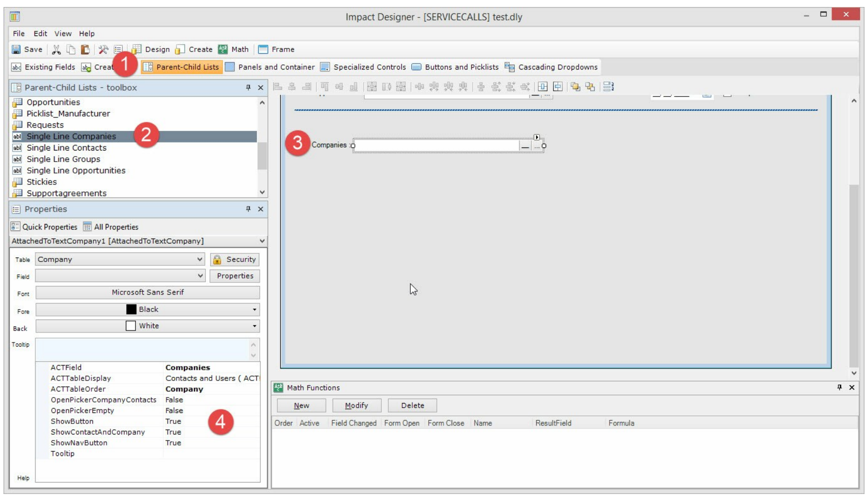
Exisiting Fields
Create Field
Parent-Child Lists
Panels and Container
Specialzied Controls
Buttons and Picklists
Contact, Company, Group and Opps fields

Contact, Company, Group and Opps fields

When you add a custom table you may need to attach multiple contacts, companies, groups and/or opportunities. Using any one or a combination of these four controls you can attach the custom record to each.

To add one of these controls open the form in the designer and ollow these steps:

1. Click on the "Parent-Child icon on the top toolbar
2. From the TOOLBOX list on the left side select your desired entity
3. Drag the control onto the form
4. Use the PROPERTIES panel set your desired options.



See also

[Exisiting Fields](#)
[Create Field](#)
[Parent-Child Lists](#)
[Panels and Container](#)
[Specialzied Controls](#)
[Buttons and Picklists](#)
[Cascading Dropdowns](#)

Properties

Article ID: contact__company__grou
Views: 157
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:46 PM

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Attach Contacts

This control allows you to select which CONTACT the record in the custom table is attached to. You can use this control to add fields from the contact table onto the data entry form such as city, state or zip. This control by default displays the contact name but can be set to any other field. You can add multiple controls to display multiple fields at the same time such as the address on the attached contact.

To add one of these controls open the form in the designer and follow these steps:

1. Click on the "Parent-Child icon on the top toolbar
2. From the TOOLBOX list on the left side select your desired entity
3. Drag the control onto the form
4. Use the PROPERTIES panel set your desired options

Properties

Article ID: attach_contacts
Views: 155
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:46 PM

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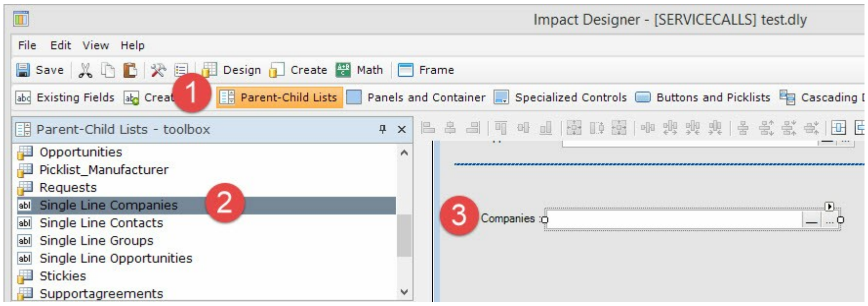
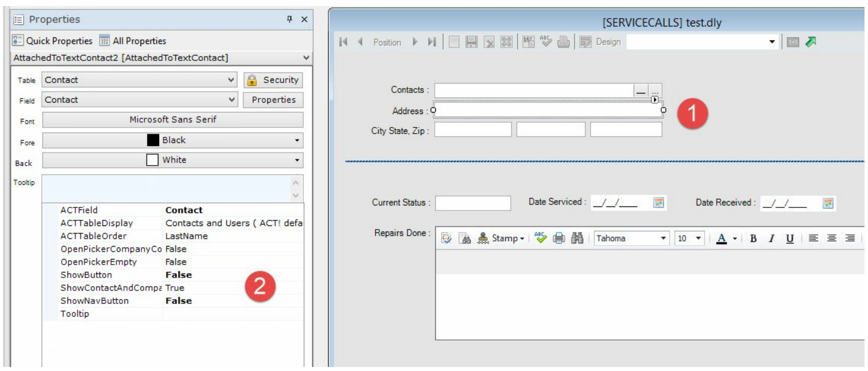
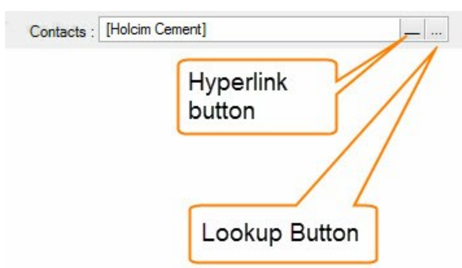


In the picture below we added four additional field using the same steps as above. Each time we added the control we changes the property to display different fields from the contact table.

1. Using the mouse select the control.
2. On the left side use the properties panel to change your desired options





There are two buttons on the right side of the control. These button action are:
Hyperlink Button - Forces act! to display the attached contact on the contact details view behind the data entry form.

Lookup Button - Opens the Entity Picker to select the contacts to attach to the current record.

In the properties panel these options are available:

ACT Field: The field to display in the control

ACT Table Display: The display order if there are multiple contact attached.

ACT Table Order: The order of the field being displayed if multiple contacts are attached.

Open Picker Company Contact: Option to open the entity picker for the companies attached to the current contact
(Only available when using the Company Control)

Open Picker Empty: When the Lookup Button is clicked which opens the contact picker this options set if the attached contacts are pre-selected. When TRUE no contacts are pre-selected.

Show Button: Is the Lookup Button visible (For fields such as address you may ant this option FALSE)

Show Contact and Company: Does the text box display the contact name and the company name. "Chris Huffman [CH TechONE]"

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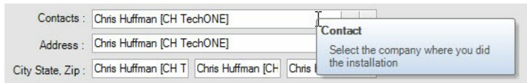
Show Nav Button: Is the Hyperlink button visible (For fields such as address you may ant this option FALSE)

Tooltip: Display a tool tip wen the mouse hovers over the control. This can be useful for training and verification of data entry requirements.



See also

[Attach Companies](#)
[Attach Groups](#)
[Attach Opportunities](#)

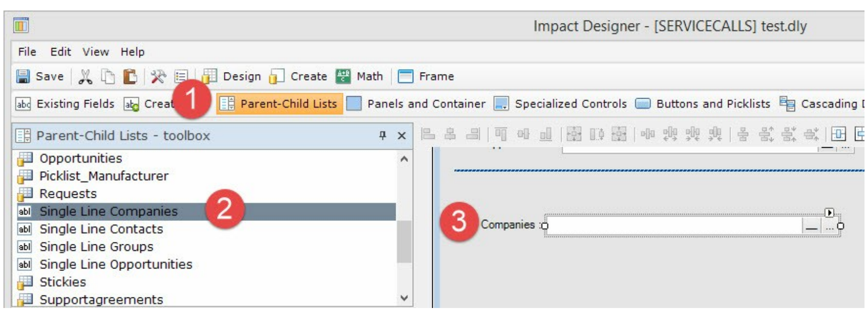
Home > Impact Suite > Tables and Forms > Controls on Forms > Contact, Company, Group and Opps fields > Attach Companies

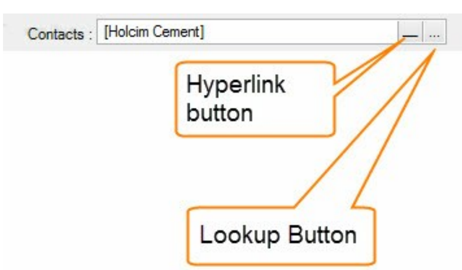
Attach Companies

This control allows you to select which COMPANIES the record in the custom table is attached to. You can use this control to add fields from the company table onto the data entry form such as city, state or zip. This control by default displays the company name but can be set to any other field. You can add multiple controls to display multiple fields at the same time such as the address on the attached companies.

To add one of these controls open the form in the designer and follow these steps:

1. Click on the "Parent-Child icon on the top toolbar
2. From the TOOLBOX list on the left side select your desired entity
3. Drag the control onto the form
4. Use the PROPERTIES panel set your desired options





There are two buttons on the right side of the control. These button action are:
Hyperlink Button - Forces act! to display the attached contact on the contact details view behind the data entry form.

Lookup Button - Opens the Entity Picker to select the contacts to attach to the current record.

In the properties panel these options are available:

ACT Field: The field to display in the control

Properties

Article ID:	company_picker
Views:	163
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:46 PM

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ACT Table Display: The display order if there are multiple companies attached.

ACT Table Order: The order of the field being displayed if multiple companies are attached.

Open Picker Company Contact: ONLY USED IN CONTACT

Open Picker Empty: When the Lookup Button is clicked which opens the contact picker this options set if the attached companies are pre-selected. When TRUE no companies are pre-selected.

Show Button: Is the Lookup Button visible (For fields such as address you may ant this option FALSE)

Show Contact and Company: ONLY USED IN CONTACT

Show Nav Button: Is the Hyperlink button visible (For fields such as address you may ant this option FALSE)

Tooltip: Display a tool tip when the mouse hovers over the control. This can be useful for training and verification of data entry requirements.

See also

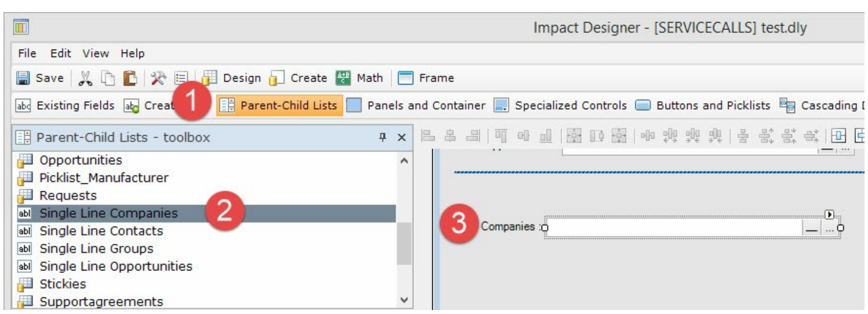
Attach Contacts
Attach Groups
Attach Opportunities

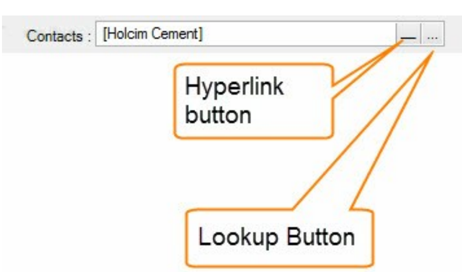
Attach Groups

This control allows you to select which GROUPS the record in the custom table is attached to. You can use this control to add fields from the group table onto the data entry form such as description. This control by default displays the group name but can be set to any other field. You can add multiple controls to display multiple fields at the same time.

To add one of these controls open the form in the designer and follow these steps:

1. Click on the "Parent-Child icon on the top toolbar
2. From the TOOLBOX list on the left side select your desired entity
3. Drag the control onto the form
4. Use the PROPERTIES panel set your desired options





Properties

Article ID:	group_picker
Views:	124
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:46 PM

Actions

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There are two buttons on the right side of the control. These button action are:

Hyperlink Button - Forces act! to display the attached groups on the group details view behind the data entry form.

Lookup Button - Opens the Entity Picker to select the groups to attach to the current record.

In the properties panel these options are available:

ACT Field: The field to display in the control

ACT Table Display: The display order if there are multiple groups attached.

ACT Table Order: The order of the field being displayed if multiple groups are attached.

Open Picker Company Contact: ONLY USED IN CONTACT

Open Picker Empty: When the Lookup Button is clicked which opens the group picker this options sets if the attached groups are pre-selected. When TRUE no groups are pre-selected.

Show Button: Is the Lookup Button visible (For fields such as description you may ant this option FALSE)

Show Contact and Company: ONLY USED IN CONTACT

Show Nav Button: Is the Hyperlink button visible (For fields such as description you may ant this option FALSE)

Tooltip: Display a tool tip when the mouse hovers over the control. This can be useful for training and verification of data entry requirements.

See also

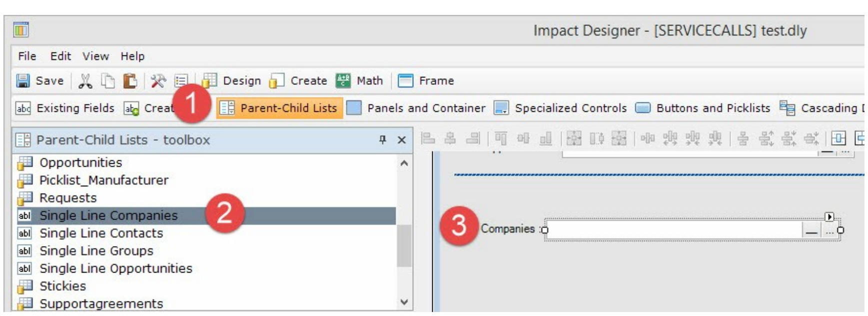
Attach Contacts
Attach Companies
Attach Opportunities

Attach Opportunities

This control allows you to select which OPPORTUNITIES the record in the custom table is attached to. You can use this control to add fields from the opportunity table onto the data entry form such as status and/or open date. This control by default displays the opportunity name but can be set to any other field. You can add multiple controls to display multiple fields at the same time.

To add one of these controls open the form in the designer and follow these steps:

1. Click on the "Parent-Child icon on the top toolbar
2. From the TOOLBOX list on the left side select your desired entity
3. Drag the control onto the form
4. Use the PROPERTIES panel set your desired options



Properties

Article ID:	opportunity_picker
Views:	136
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:46 PM

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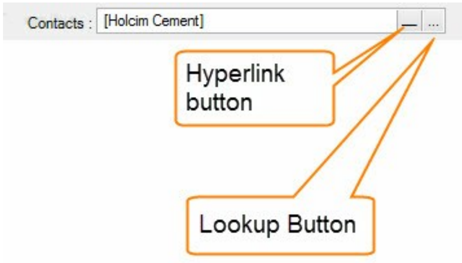

There are two buttons on the right side of the control. These button action are:

Hyperlink Button - Forces act! to display the attached opportunities on the opportunities details view behind the data entry form.

Lookup Button - Opens the Entity Picker to select the opportunity to attach to the current record.

In the properties panel these options are available:

ACT Field: The field to display in the control

ACT Table Display: The display order if there are multiple opportunities attached.

ACT Table Order: The order of the field being displayed if multiple opportunities are attached.

Open Picker Company Contact: ONLY USED IN CONTACT

Open Picker Empty: When the Lookup Button is clicked which opens the opportunity picker this options sets if the attached opportunity are pre-selected. When TRUE no groups are pre-selected.

Show Button: Is the Lookup Button visible (For fields such as status and/or open date you may ant this option FALSE)

Show Contact and Company: ONLY USED IN CONTACT

Show Nav Button: Is the Hyperlink button visible (For fields such as status and/or open date you may ant this option FALSE)

Tooltip: Display a tool tip when the mouse hovers over the control. This can be useful for training and verification of data entry requirements.

See also

Attach Contacts
Attach Companies
Attach Groups

Field Designer

When creating a custom table you will probably start with one of the table templates. But there will be times when the template just does not have enough fields for your workflow. To overcome this just add new fields into the custom table. You can add almost any style of field - from character to numeric to picture fields. To add a new field to a custom table, follow these steps:

1. In ACT go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. Select the table to alter
3. On the upper left click on the CREATE FIELD
4. Give the field a name and select the data type such as PICTURE
5. Click NEXT and fill out your desired settings
6. Click FINISHED when completed and the field will be added to the custom table

To Edit a field

1. In ACT go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. Select the field to alter
3. On the upper left click on the EDIT FIELD
4. Change the desired settings
5. Click NEXT and change any other settings
6. Click FINISHED when completed and the field will be updated in the custom table

To remove a field from a custom table, follow these steps:

1. In ACT go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. Select the table to alter
3. Click on DELETE FIELD
4. Answer yes to delete the field

See also

Tables
Define Fields and tables
Table Wizard
Forms Designer
Advanced Functions
Controls on Forms
Table Designer
Tab Order on Detail View

Properties

Article ID: field_designer
Views: 152
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:46 PM

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Table Designer

The best place to start adding your first custom table is by using one of the pre-defined templates. These templates contain some basic fields. You can add additional fields or alter the existing field from the template after it is added to the database. For the purpose of this manual we will create our table directly from a template:

1. Go to the TOOLS menu and select DEFINE CUSTOM TABLES
2. Click on the CREATE TABLE BUTTON
3. Give your new table a name.
4. Click on the SAVE button, a progress bar will display the process of adding the table and the fields.
5. When completed you will be notified with a small dialog box. Click OK to close.

Properties

Article ID: table_designer
Views: 146
Created By: jimdurkin
Modified By: [Modified By]
Created Date: 3/24/2014 12:31 PM
Last Modified: 3/24/2014 1:46 PM

Actions

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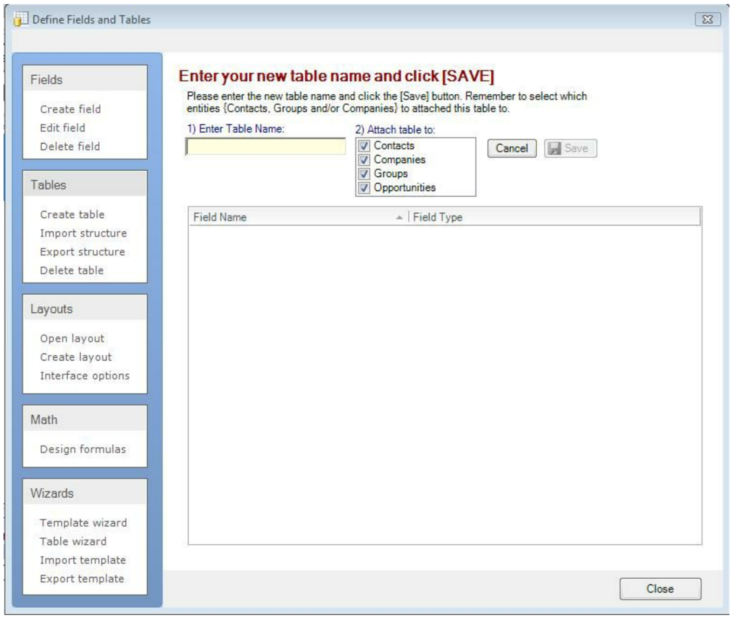

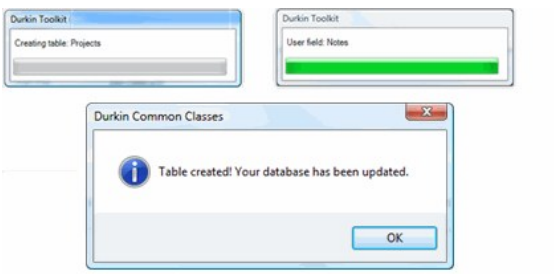

Templates aren't the only way to create a table

You can easily create a table from a template but you can also create a new (Blank) table and add all your own fields. Here are some ways to add new custom tables.

1) Using one of our pre-defined templates
2) From an existing ACT! table like Contacts or Activities
3) From a template supplied to you from a consultant
4) Empty table where you add all your own fields "(Blank)"

Templates provide a great starting point for your table designs

We have pre-defined many templates for many different industries but you are the ultimate decision maker of what data you need to capture. We suggest starting out with a template to get the basics in place - but adding additional fields required by you and or your company. If you are working with a consultant they can also provide you with a custom template. Remember, you can always go back and add more fields at any time in the future.

See also

Tables
Define Fields and tables
Table Wizard
Forms Designer
Advanced Functions
Controls on Forms
Field Designer
Tab Order on Detail View

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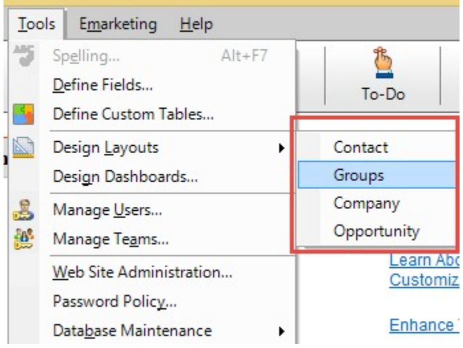
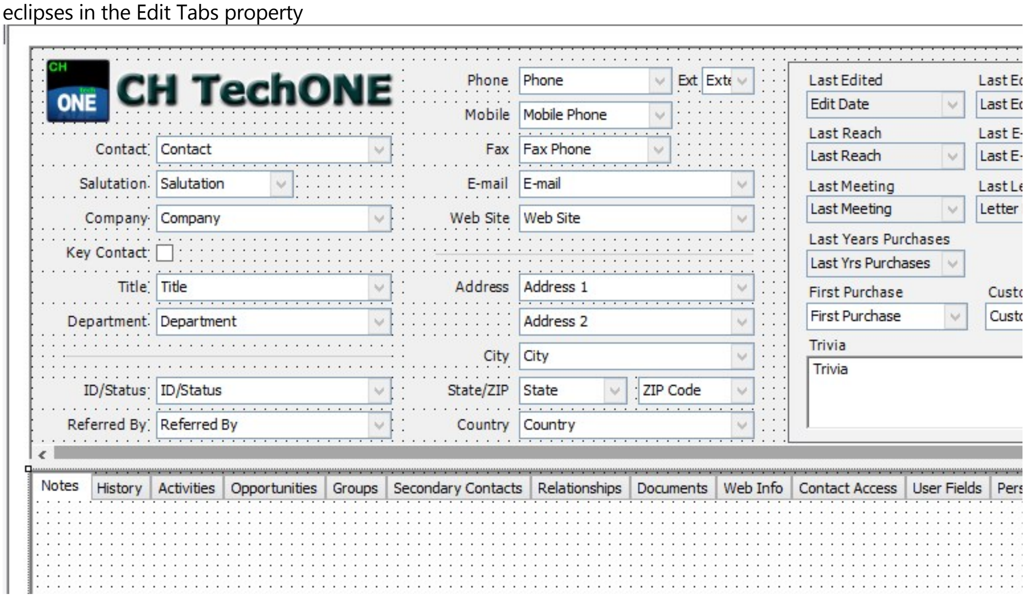
Tab Order on Detail View

The custom table tab order can be ordered to put the custom tables in a specific order.

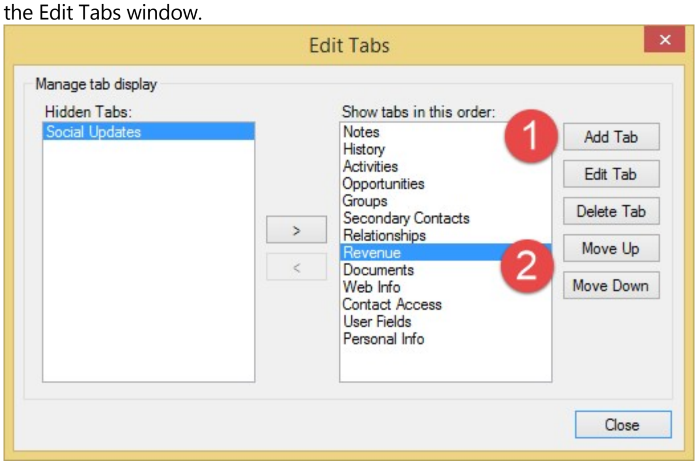
Go to Tools > Design layouts > Choose the Act entity layout to order.



In the layout designer press F4 to show the properties window (1) > select the tab control (2) > click the eclipses in the Edit Tabs property



Click the Add Tab button (1) add the name of the custom table and position the tab using the Move Up and Move Down buttons (2). When the layout is loaded Impact will put the custom table where you placed it with the Edit Tabs window.



Related Files

Properties

Article ID: tab_order_on_detail_view

Views: 38

Created By: admin

Modified By: [Modified By]

Created Date: 8/19/2014 6:44 AM

Last Modified: 8/19/2014 6:59 AM

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none..

Related Pages

none..

Home > Impact Suite > Import Files

Import Files

Import to Custom Table

Import to Custom Records to Single ACT entity

See also

- Getting Started
- Settings and Options
- Filter Panels
- Pivot Table
- Chart
- Tables and Forms
- Math
- Memo w/Spell Checking
- Printing
- How-To Examples

Properties

Article ID:	import_files
Views:	166
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/24/2014 1:47 PM

Actions

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Home > Impact Suite > Import Files > Import to Custom Table

Import to Custom Table

Once you have a custom table you can populate the records from an external file. To import from a file into a custom table follow the steps below.

1 Open ACT

2 Click File > Import into custom tables

3 Click the next button

Properties

Article ID:	import_to_custom_table
Views:	169
Created By:	jimdurkin
Modified By:	[Modified By]
Created Date:	3/24/2014 12:31 PM
Last Modified:	3/27/2014 11:34 AM

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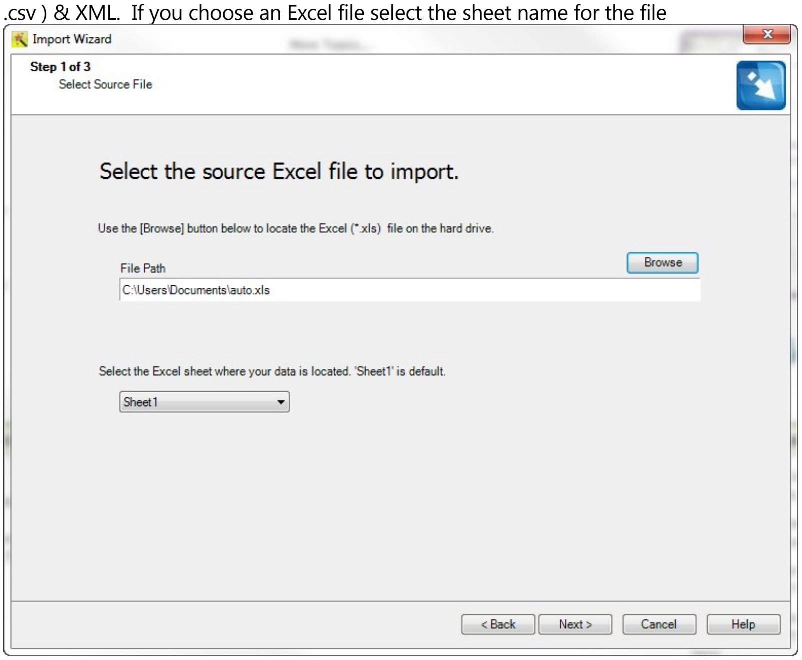
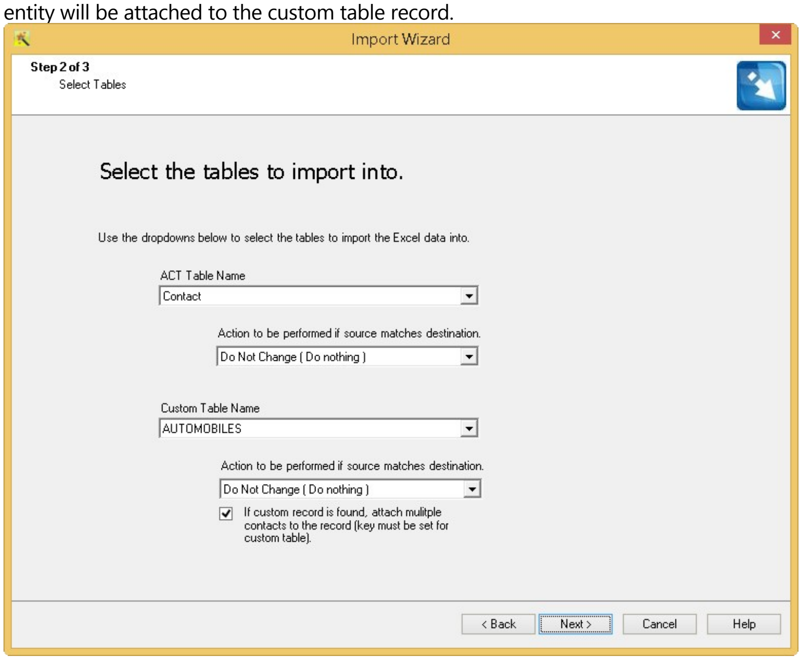
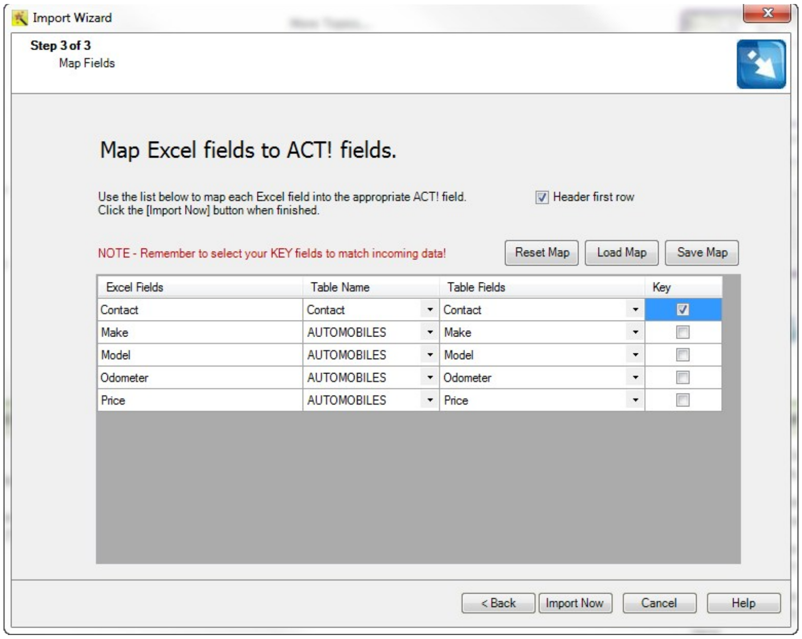
4 Click the browse button to choose a file to import. Valid file types are Excel (.xls & .xlsx), Comma Delimited (.csv) & XML. If you choose an Excel file select the sheet name for the file



5 Select the ACT table name that the records will be attached to and the table name of the custom table. The two drop down lists give the choice to do not change or replace with source, do not change will not change any fields if on importing replace with source will overwrite the data in the ACT database with the information from the external file. If the "Attach multiple Act entities" checkbox is checked and a primary key for the custom table is set in step 6, when importing if the custom table record is found more than once during the import each Act entity will be attached to the custom table record.



6 Math the external file fields with the correct table name and table field from ACT. At lease one key is required for the ACT table, this is used to find the correct ACT entities to attach the records to. A key is not required for the custom table, it is only needed if you want to update records already in the database.



7 When the import is done a window will say "Import Complete"

See also

Import to Custom Records to Single ACT entity

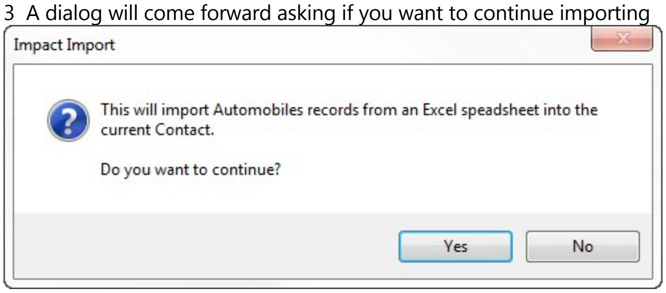
Import to Custom Records to Single ACT entity

Records can be directly imported to a Contact, Company, Group or Opportunity.

1 On the detail view click on the table names tab

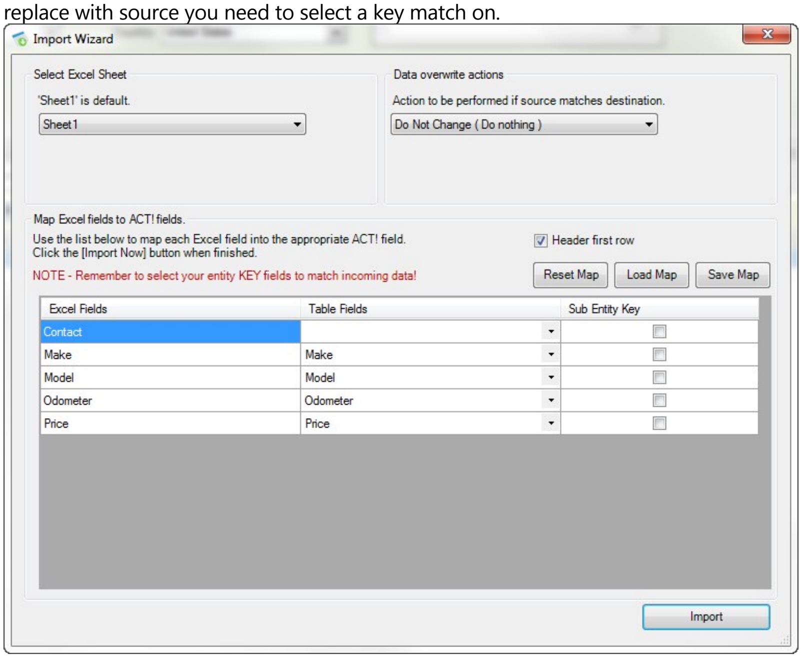
2 Click on the import button in the toolbar

3 A dialog will come forward asking if you want to continue importing



4 Select the file to import

5 A simplified version of the custom table importer will come forward. Choose the sheet and if data should be left unchanged or replaced. Map the fields from the external file to the custom table fields. If you choose to replace with source you need to select a key match on.



6 When finished a box will say "Import complete"

See also

Import to Custom Table