



Imagine. Create. Discover.

# User Manual

TopLine Results Corporation 2008-2009

Created: Tuesday, March 17, 2009

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TopLineDesigner

# Online Help

TopLine Designer is an add-on product for ACT! by Sage that gives you the ability to add new custom sub-entities and it provides a framework for designing screens, relationships and calculations for those sub-entities. A sub-entity is another word for a sub-table. It is a table that must be related to a specific Contact, Company, or Group. Entities such as Contacts, Companies, and Groups are called Top-Level Entities. Top-Level Entities cannot be created using this tool.

TopLine Designer has two major components. There is the Administration component and the End User component.



Installation



Administrator  
Functions



End User Functions



Windows vs Web  
Functionality



Integration with  
TopLine Dash



FAQ



Videos

## Welcome

---

Welcome to the TopLineDesigner online help system. Browse through the help pages by clicking on the links above or selecting pages in the table of contents. To quickly find specific product information, enter search criteria in the search box above and click the search button.

## Most popular pages

---

- [Welcome](#)
- [System Requirements](#)
- [Installation](#)
- [Obtaining Installation Program](#)
- [Features](#)
- [Create a New Table](#)
- [Administrator Functions](#)
- [Displaying Current Version](#)
- [Running Installation](#)
- [Using List View](#)

---

Home > Welcome > Features

## TopLine Designer Features

### For the ACT! Windows user:

View tables interactively, go to the corresponding contact, company or group.

Drill down on custom tables to access the detail view.

Create a contact, company or group lookup.

Click to sort or filter in the list view.

Create robust queries and apply date ranges.

Perform advanced calculations among fields and in the list view.

Create activities or histories based on custom-table fields.

Generate email notifications.

Modify field appearance (auto hide, change color) based on conditions.

Drag and drop fields to group and organize your custom lists.

Organize, sort or query your documents.

Export list views to MS Excel.

Merge custom-table fields into MS Word to create documents and templates.

Synchronize your customizations and data.

Integrate with TopLine Dash for enhanced reporting and graphical views.

Automate your Excel or PDF custom table reports using TopLine Dash Alerts.

### For the ACT! Web user:

View, edit or create table content interactively.

Drill down on custom tables to access the detail view.

Click to sort in the list view.

### For the ACT! administrator:

Build relationships between contact, company or group tables.

Build relationships between custom tables allowing for parent-child relationships.

Build screens with one or more embedded custom tables.

Create new fields and field calculations.

Use scripting to perform advanced calculations, task automation and to vary field appearance based on conditions (auto hide, change color and more).

Design, color code and embed your layout screens.

Use snippets and scripting to add new functionality easily in .NET.

Import/export the TopLine Designer customizations.

Import data into your custom tables from any OLEDB-compatible data source; CSV files; Excel spreadsheets; or SQL, Oracle or MS Access databases.

Synchronize and back up custom tables and customizations.

Protect your database. Only the ACT! Administrator can perform customizations.

See also

[Home](#) > [Installation](#)

This section will demonstrate how to:

- Install TopLine Designer for ACT!
- Activate TopLine Designer with serial number
- Configure TopLine Designer to work with ACT! for Web
- Obtain Designer Updates
- Display the current version and serial number of Designer

### Articles in this section



[System Requirements](#)



[Obtaining Installation Program](#)



[Running Installation](#)



[Activation](#)



[Web License Manager](#)



[Obtaining Updates](#)



[Displaying Current Version](#)

### See also

[Welcome](#)  
[Administrator Functions](#)  
[End User Functions](#)  
[Windows vs Web Functionality](#)  
[Integration with TopLine Dash](#)  
[FAQ](#)  
[Videos](#)

[Home](#) > [Installation](#) > [System Requirements](#)

## System Requirements

TopLine Designer requires ACT! 2008 version 10.0.2 or higher. ACT! 2009 is also supported. You must be an ACT! Administrator in order to make schema changes. Schema changes cannot be made on a remote database.

### See also

[Obtaining Installation Program](#)  
[Running Installation](#)  
[Activation](#)  
[Web License Manager](#)  
[Obtaining Updates](#)  
[Displaying Current Version](#)

Home > Installation > Obtaining Installation Program

## Obtaining Installation Program

If you have a previous version of TopLine Designer installed, you must first uninstall it using Add/Remove Programs (or Programs and Features in Windows Vista) from the Control Panel.

Direct your web browser to <http://www.toplineresults.com/products/downloads.htm> in order to download the latest version. Select TopLine Designer for the version of ACT! currently installed. When prompted, select Run to install TopLine Designer.

After the software has been installed, you will see additional menu items in ACT!.

### See also

- [System Requirements](#)
- [Running Installation](#)
- [Activation](#)
- [Web License Manager](#)
- [Obtaining Updates](#)
- [Displaying Current Version](#)

Home > Installation > Running Installation

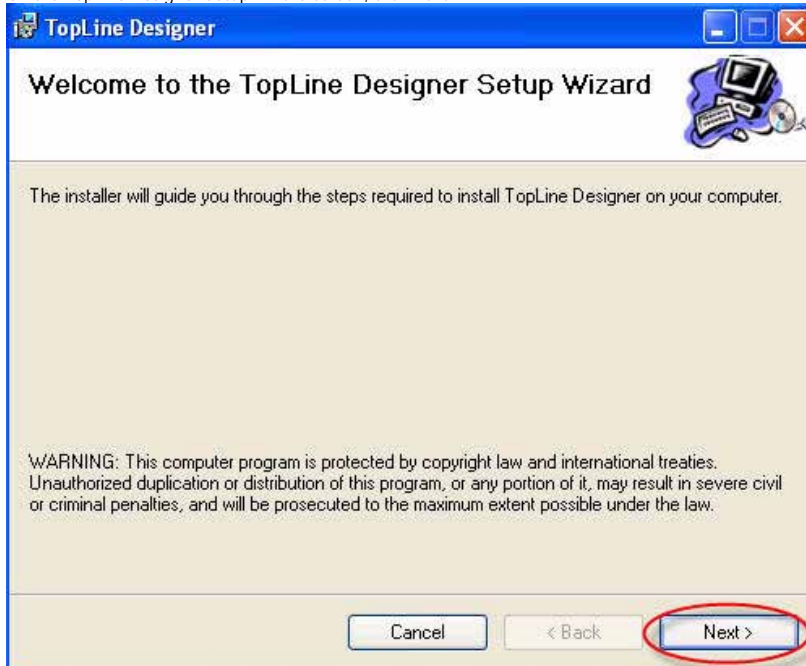
## Running Installation

Close ACT! before installing TopLine Designer.

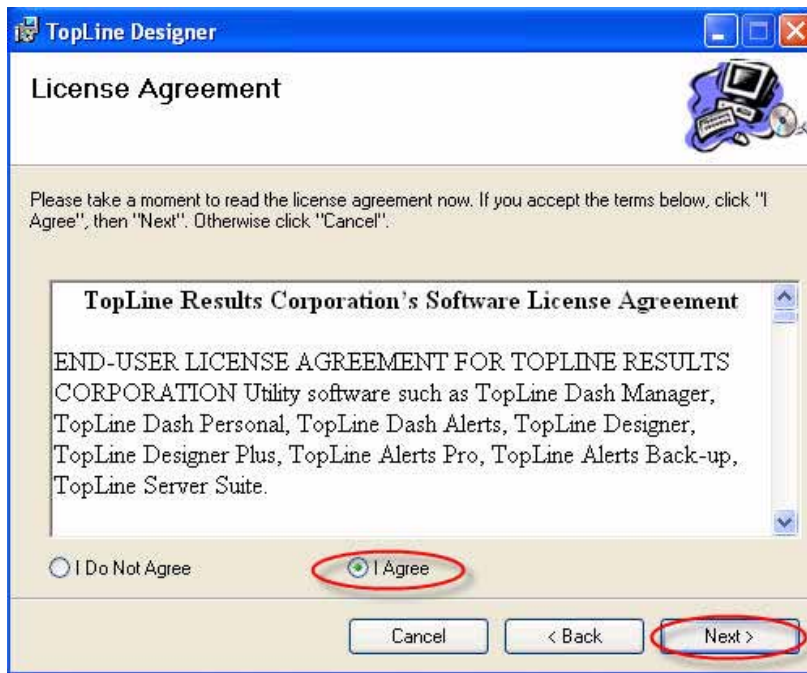
1. Double click on the installer MSI (usually named TopLineDesignerX.X.X.msi, where X.X.X indicates the current version) to start the Windows Installer.



2. On the TopLine Designer Setup Wizard screen, click Next.



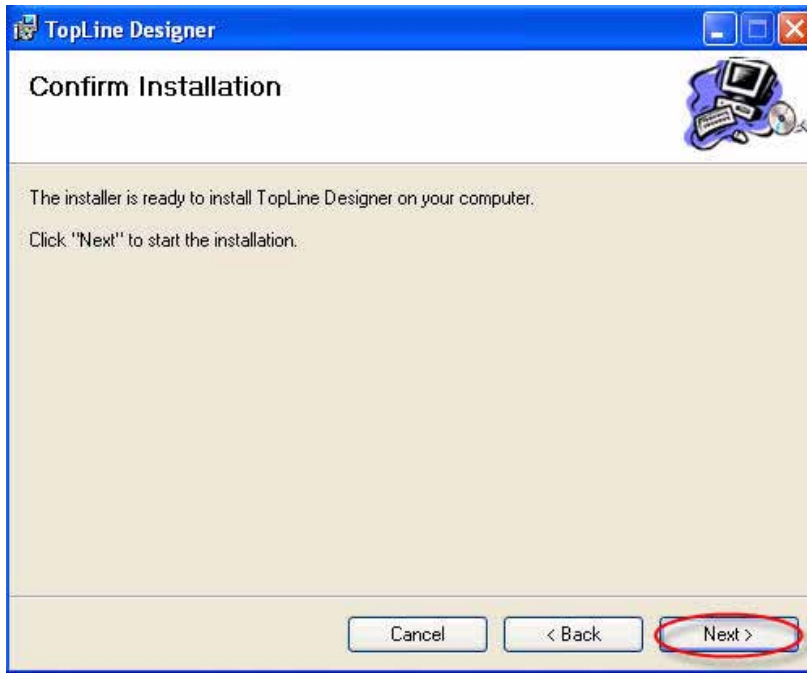
3. Agree to the License Agreement and click Next.



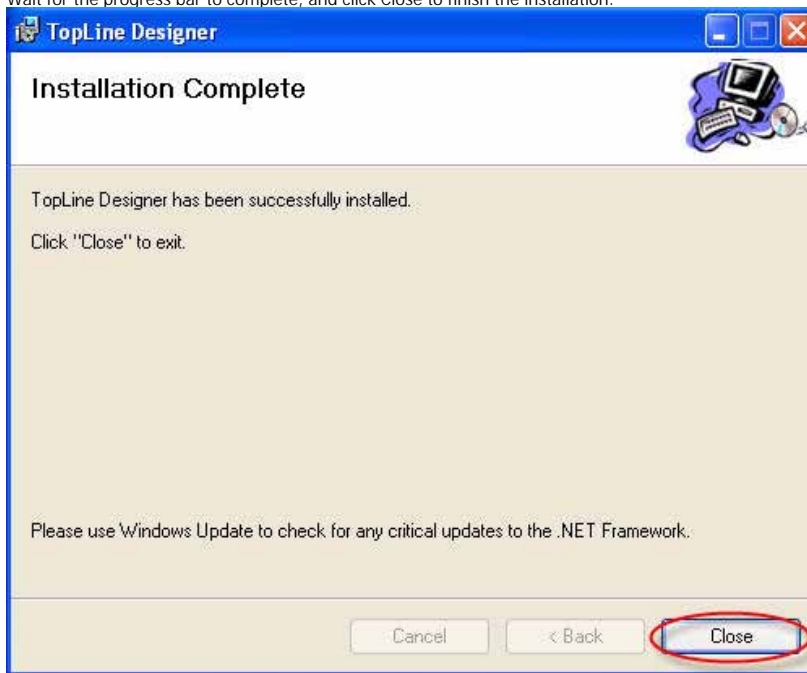
4. Accept the default installation folder, or change with the Browse button. Allow Everyone to access TopLine Designer and click Next.



5. Confirm the installation and click Next.



6. Wait for the progress bar to complete, and click Close to finish the installation.



TopLine Designer is a plugin to ACT! and will only be visible inside the ACT! program's user interface.

### See also

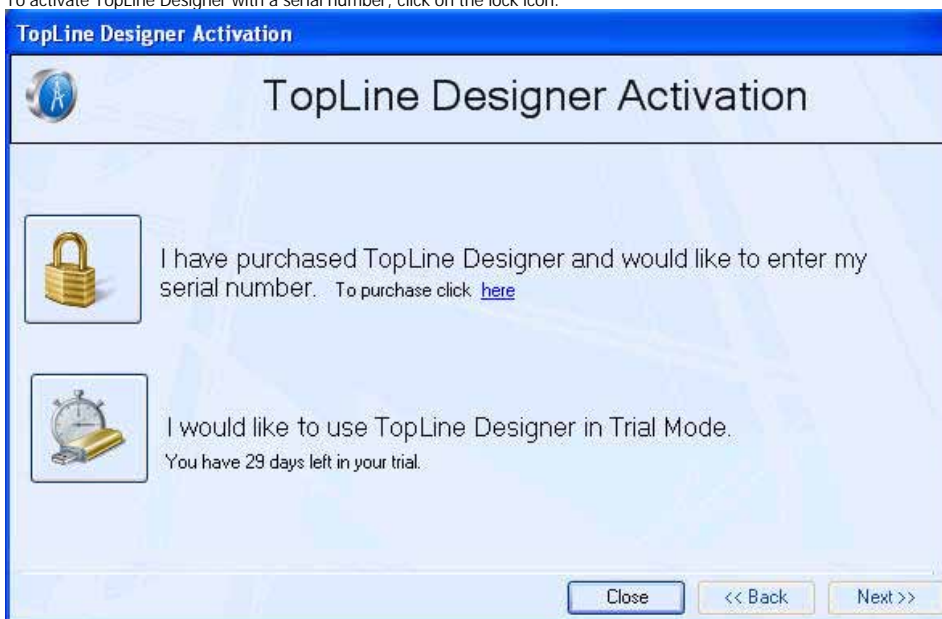
- [System Requirements](#)
- [Obtaining Installation Program](#)
- [Activation](#)
- [Web License Manager](#)
- [Obtaining Updates](#)
- [Displaying Current Version](#)

Home > Installation > Activation

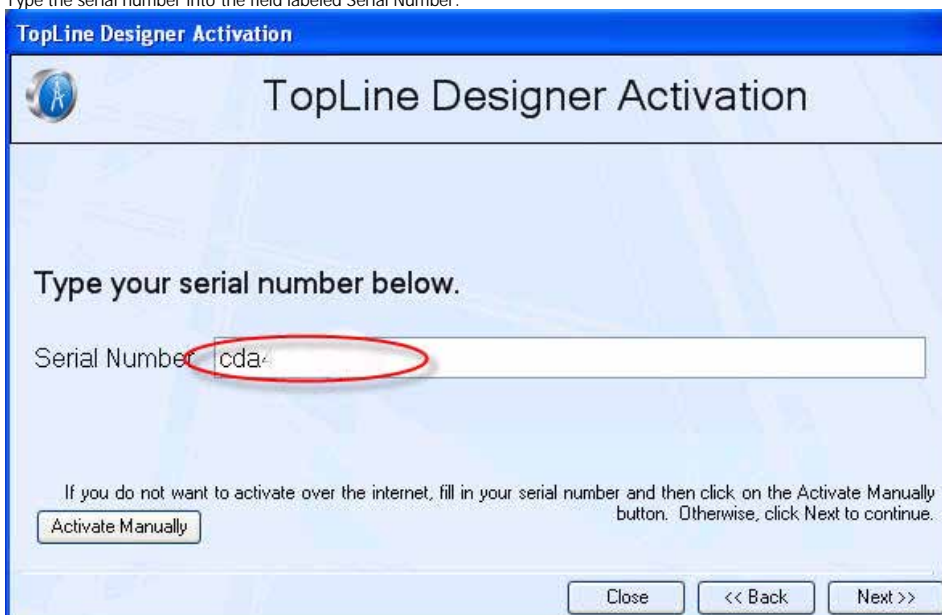
## Activation

Upon logging into an ACT! database after installing TopLine Designer, the TopLine Designer Activation window will appear. TopLine Designer is available in a fully functional 30 day trial mode, starting from the day of installation. The Activation window will display how many days are remaining in the trial. Upon expiration of the trial, all TopLine Designer data or screens will be inaccessible, but they will remain in the database.

1. To activate TopLine Designer with a serial number, click on the lock icon.



2. Type the serial number into the field labeled Serial Number.



3. If an internet connection is available, click Next to attempt to activate with our servers. If a connection is successful, the My Record information will be displayed in the Registration boxes. Confirm this information and click Next. (Proceed to step 8)

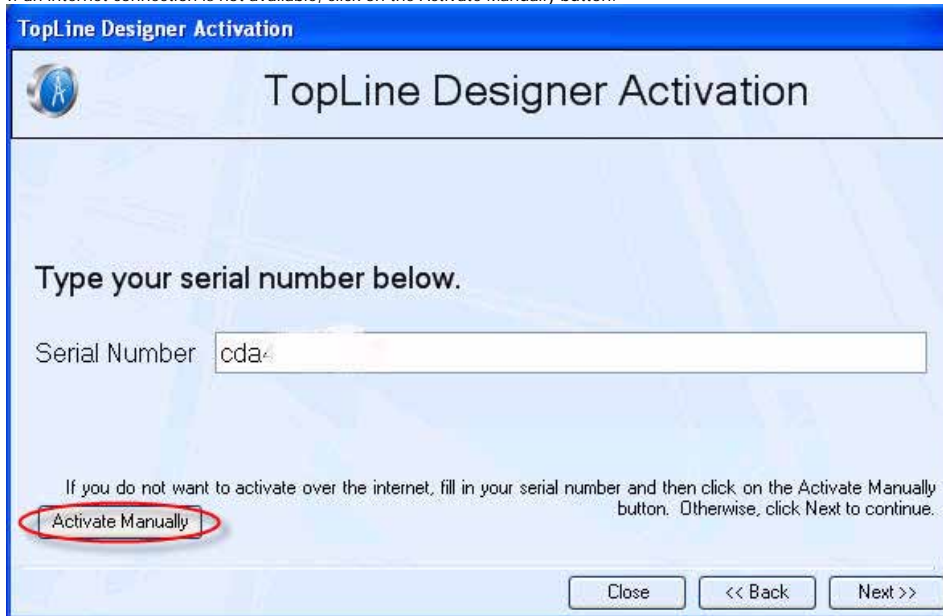


**TopLine Designer Activation**

Company Name: CH TechONE  
Name: Chris Huffman  
Address 1: 13 East 54th St.  
Address 2: Suite 300  
City: New York  
State: NY  
Zip: 10008  
Phone: (212) 555-2485  
Email Address: Chris@CHTechONE.com

Buttons: Close, << Back, **Next >>**

4. If an internet connection is not available, click on the Activate Manually button.



**TopLine Designer Activation**

Type your serial number below.

Serial Number: cda

If you do not want to activate over the internet, fill in your serial number and then click on the Activate Manually button. Otherwise, click Next to continue.

Buttons: Close, << Back, **Activate Manually**, Next >>

5. Call TopLine Results at the phone number provided, and provide them the contents of Box A and Box B. They will in turn provide you with the unlock code for Box C.

**TopLine Designer Activation**

**TopLine Designer Activation**

A connection could not be made to the activation service over the internet. If you would like to try again, click the Back button. Otherwise, follow the steps below.

1. Verify that your serial number was typed in correctly. If it was not, please click the Back button and try again.  
 (Box A)
2. You may be asked for the text in the box below.  
 (Box B)  (Case Sensitive)
3. Click [here](#) to get your unlock code by going to our webpage. If you do not have internet access, you can call TopLine Results at 1-800-880-1960.
4. Type the unlock code that you are given into the box below.  
 (Box C)

Close << Back **Next >>**

6. An unlock code can be generated without calling TopLine Results by clicking on the Unlock Code by Webpage link in Step 3.

**TopLine Designer Activation**

**TopLine Designer Activation**

A connection could not be made to the activation service over the internet. If you would like to try again, click the Back button. Otherwise, follow the steps below.

1. Verify that your serial number was typed in correctly. If it was not, please click the Back button and try again.  
 (Box A)
2. You may be asked for the text in the box below.  
 (Box B)  (Case Sensitive)
3. Click [here](#) to get your unlock code by going to our webpage. If you do not have internet access, you can call TopLine Results at 1-800-880-1960.
4. Type the unlock code that you are given into the box below.  
 (Box C)

Close << Back Next >>

7. A browser window will be opened. Enter the registration information into the boxes and click the Get Unlock Code button.

## TopLine Results Add-on Activation

Serial Number has been validated. Please register for receive product updates.

Company *	<input type="text" value="CHTech One"/>
Name *	<input type="text" value="Chris Huffman"/>
Address 1 *	<input type="text" value="13 East 54th St"/>
Address 2	<input type="text" value="Suite 300"/>
City *	<input type="text" value="New York"/>
State *	<input type="text" value="NY"/>
Zip *	<input type="text" value="10008"/>
Phone *	<input type="text" value="212 555 2485"/>
Email *	<input type="text" value="chris@chtechone.com"/>
	<input type="button" value="Get Unlock Code"/>

The unlock code will appear on the next page.


## TopLine Results Add-on Activation

Type this value into Box 3 on your activation form and click Next.

Unlock Code: 698-50

8. Enter the unlock code in Box C and click Next.

**TopLine Designer Activation**



## TopLine Designer Activation

A connection could not be made to the activation service over the internet. If you would like to try again, click the Back button. Otherwise, follow the steps below.

- Verify that your serial number was typed in correctly. If it was not, please click the Back button and try again.  
 (Box A)
- You may be asked for the text in the box below.  
 (Case Sensitive) (Box B)
- Click [here](#) to get your unlock code by going to our webpage. If you do not have internet access, you can call TopLine Results at 1-800-880-1960.
- Type the unlock code that you are given into the box below.  
 (Box C)

9. Click Finish to complete the activation process and start ACT!



### See also

- [System Requirements](#)
- [Obtaining Installation Program](#)
- [Running Installation](#)
- [Web License Manager](#)
- [Obtaining Updates](#)
- [Displaying Current Version](#)

[Home](#) > [Installation](#) > [Web License Manager](#)

## Web License Manager

TopLine Designer data and screens are available to ACT! for Web users, but additional setup is required. The ACT for Web users must be designated to use TopLine Designer and must be less or equal to the total number of TopLine Designer licenses.

The following steps are performed using the TopLine Designer for Web License Manager, which can be found under the TopLine Results program group from the Start Menu.

### Articles in this section



[Initial Setup](#)



[Adding Serial Numbers](#)



[Associating ACT Users](#)



[Viewing / Exporting Configuration](#)

### See also

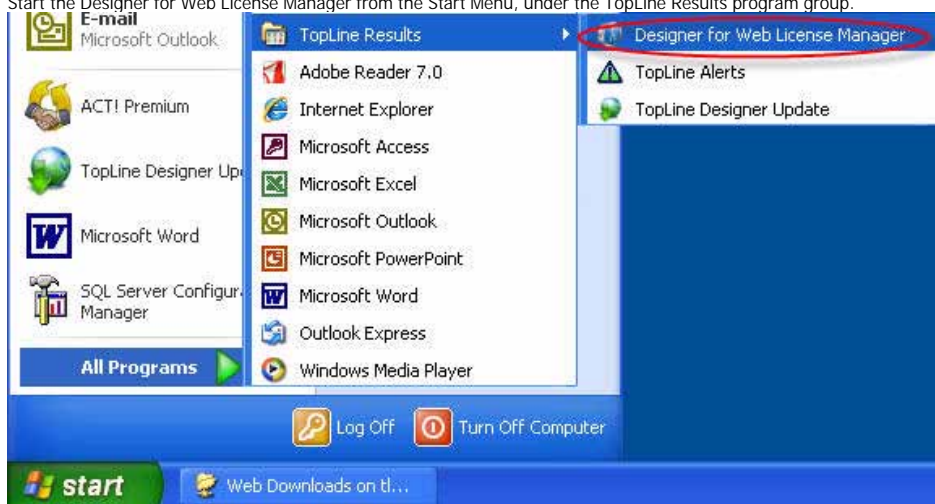
- [System Requirements](#)
- [Obtaining Installation Program](#)
- [Running Installation](#)
- [Activation](#)
- [Obtaining Updates](#)
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Home > Installation > Web License Manager > Initial Setup

## Initial Setup

The TopLine Designer for Web files must be installed in the same virtual folder as your ACT for Web program.

1. Start the Designer for Web License Manager from the Start Menu, under the TopLine Results program group.



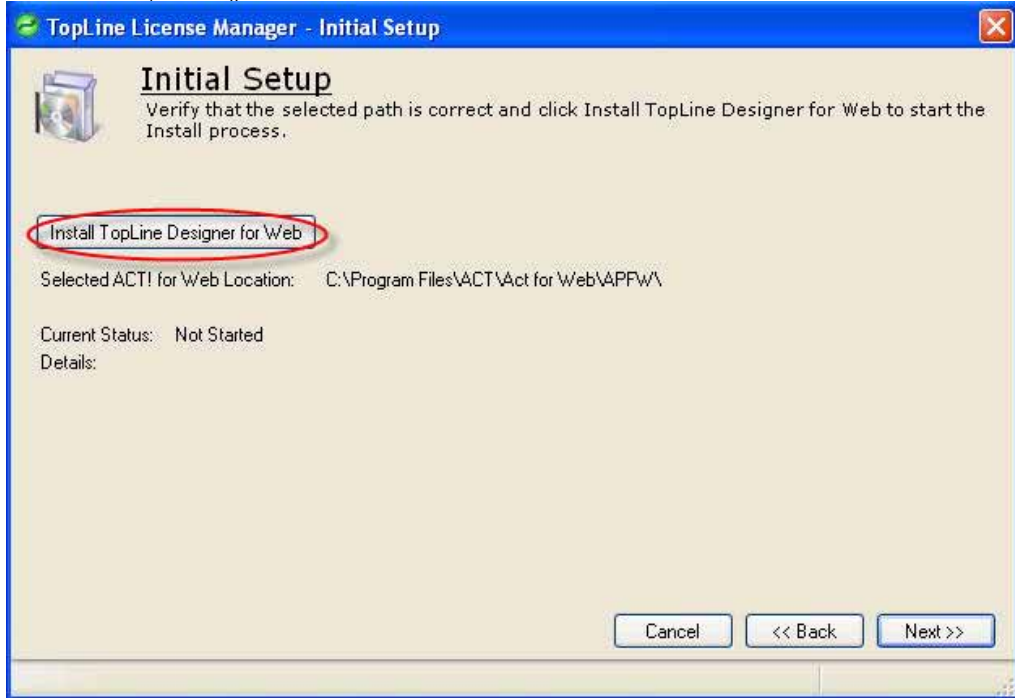
2. On the startup screen, click the Initial Setup icon.



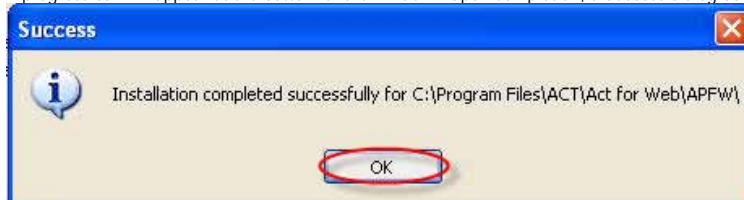
3. Select the Web Server Path. For a typical ACT for Web installation, this will be the Default Web Server Instance and the APFW Virtual Directory.
4. Click the Next button.



5. Click the Install TopLine Designer for Web button.



6. A progress bar will appear at the bottom of the window. Upon completion, a Success dialog box will appear. Click Ok.



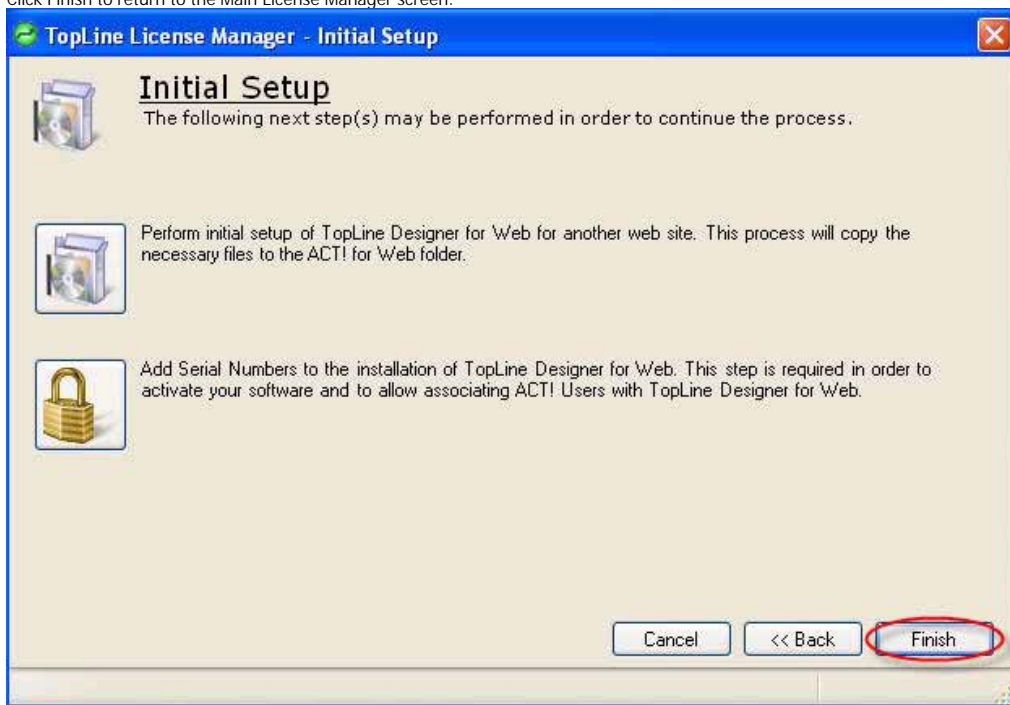
7. The Designer for Web License Manager will display a Reset Web Server dialog box to restart the local webserver. Click Yes to proceed.



8. A progress bar will appear at the bottom of the window. Upon completion, a Success dialog box will appear. Click Ok.



9. Click Next  
10. Following the Initial Setup, a window will appear to perform another Initial Setup or continue to the next setup step.  
11. Click Finish to return to the Main License Manager screen.



## See also

[Adding Serial Numbers](#)  
[Associating ACT Users](#)  
[Viewing / Exporting Configuration](#)

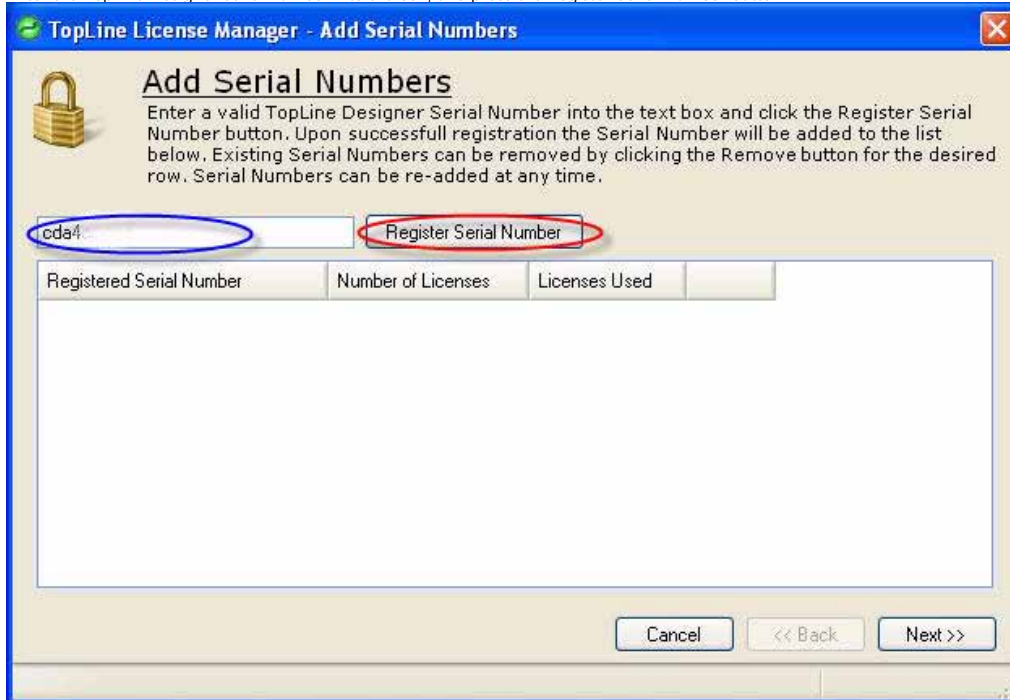
## Adding Serial Numbers

Once the Initial Setup has completed and the Designer for Web files have been installed, the TopLine Designer serial number must be entered into the License Manager for the ACT for Web application.

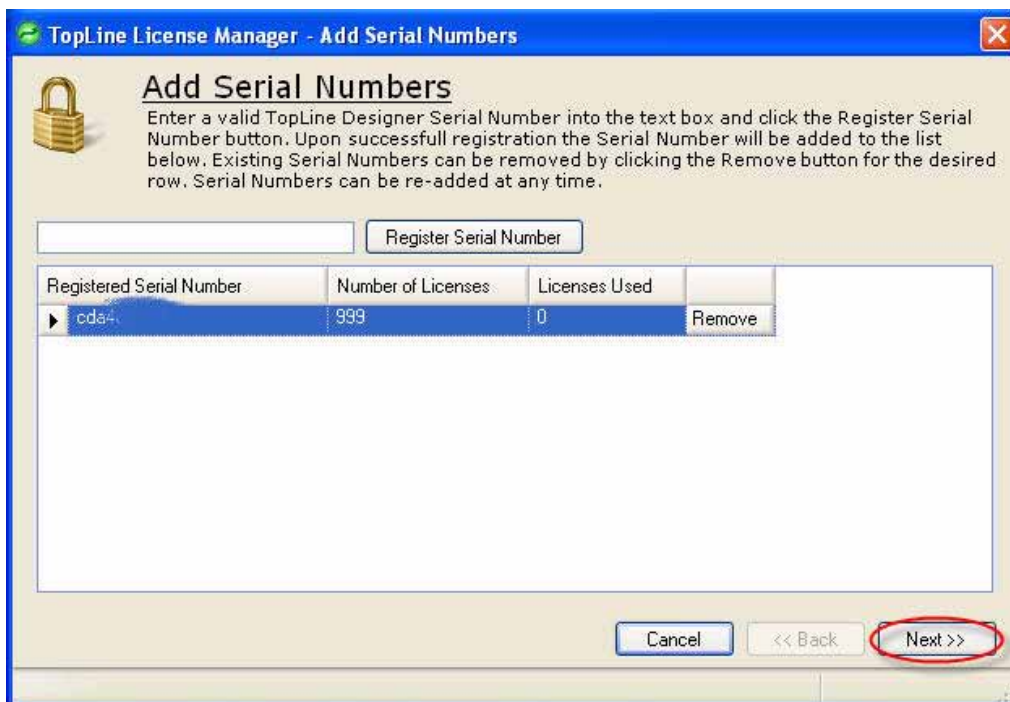
1. On the startup screen, click the Add Serial Numbers button



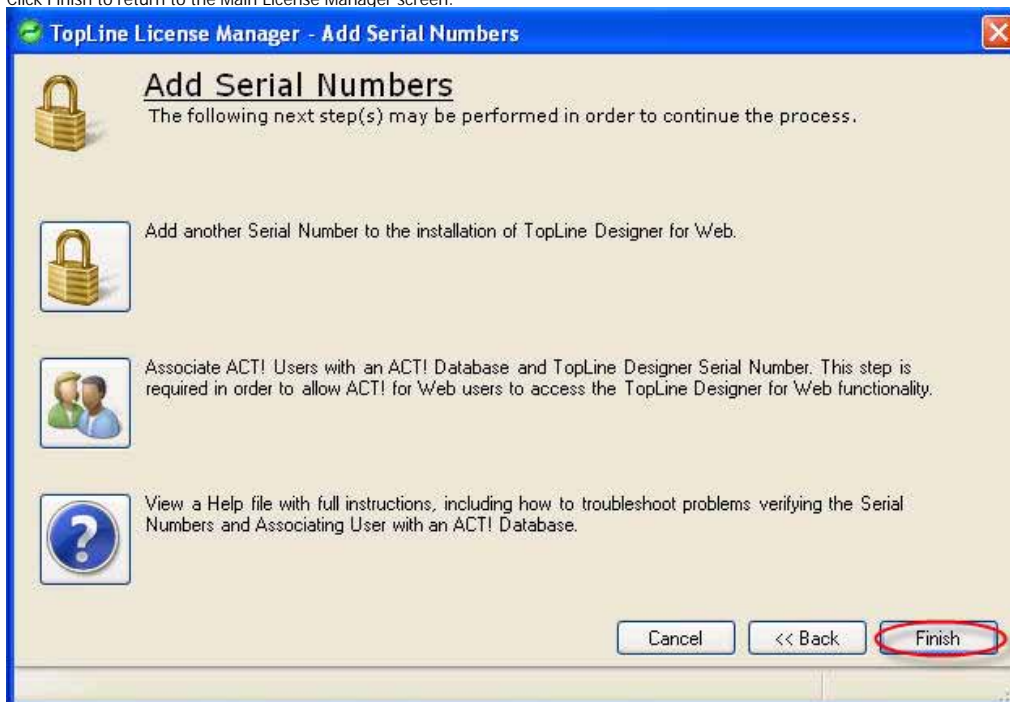
2. Enter the TopLine Designer serial number into the box, and press the Register Serial Number button.



3. Once the serial number has been confirmed, it will be displayed in the lower section of the screen.
4. Click Next



5. Following the Initial Setup, a window will appear to perform another Initial Setup or continue to the next setup step.
6. Click Finish to return to the Main License Manager screen.



The lower section of the screen will display all TopLine Designer serial numbers, the number of licenses associated with that serial number and number of licenses assigned to users.

The serial number can be removed from the License Manager by highlighting the serial number in the lower section of the screen and pressing the Remove button.

## See also

[Initial Setup](#)  
[Associating ACT Users](#)  
[Viewing / Exporting Configuration](#)

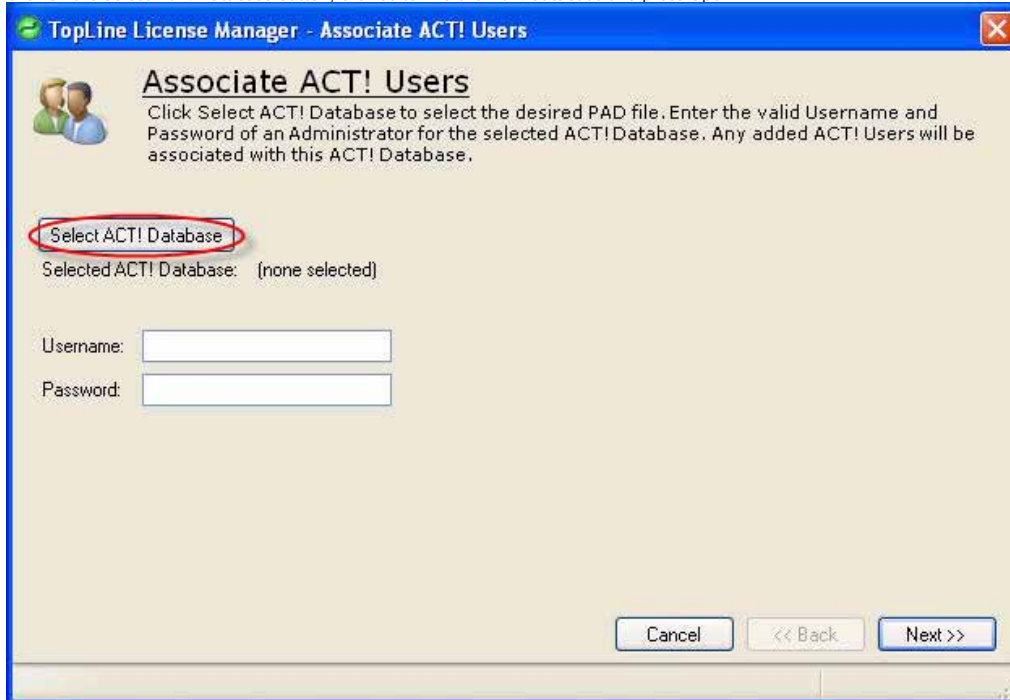
## Associating ACT Users

Any ACT user must be designated to be allowed to see TopLine Designer data and screens. Multiple users can be associated with multiple databases using TopLine Designer.

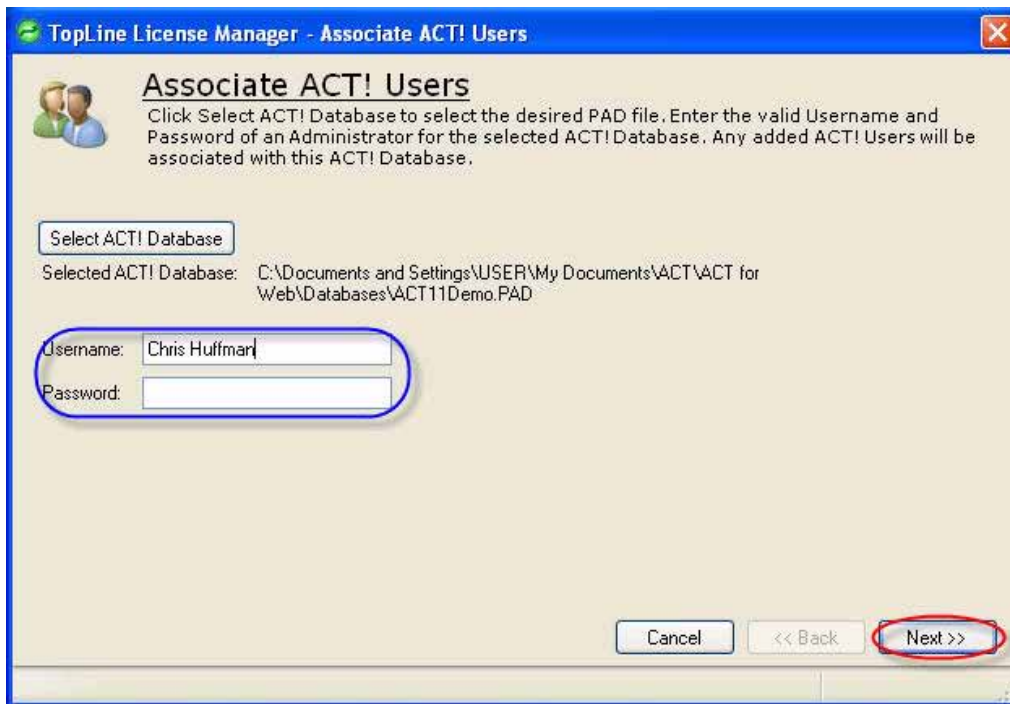
1. On the startup screen, click the Associate ACT! Users button



2. Click on the Select ACT! Database button, browse to find the ACT! database and press Open.



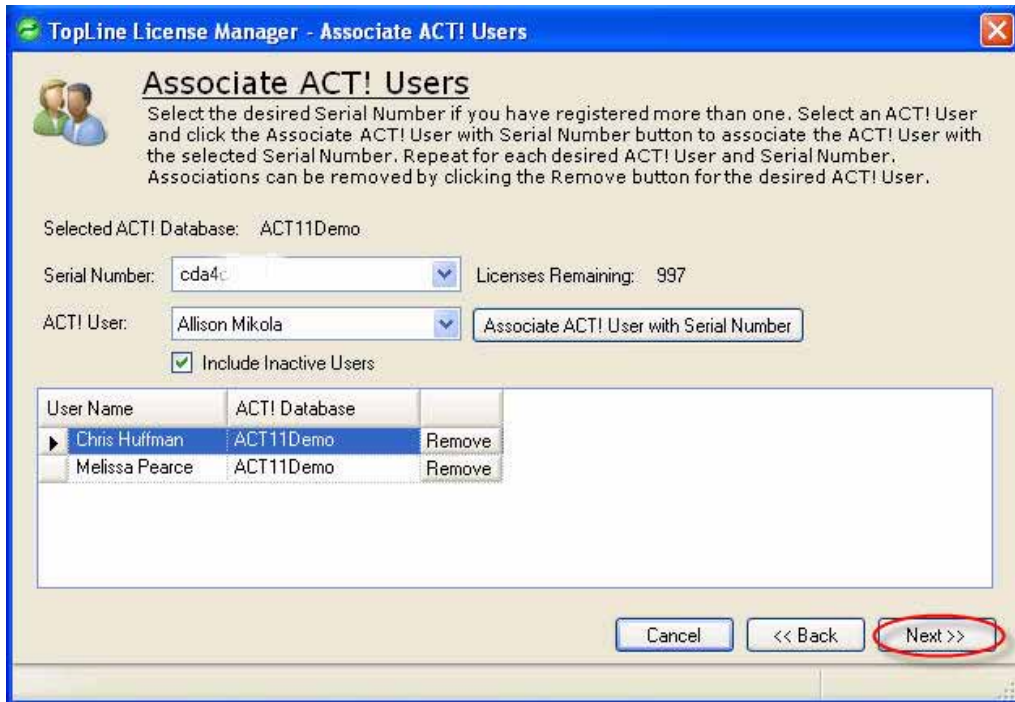
3. Enter the ACT! username and password of the ACT! Administrator, then click Next.



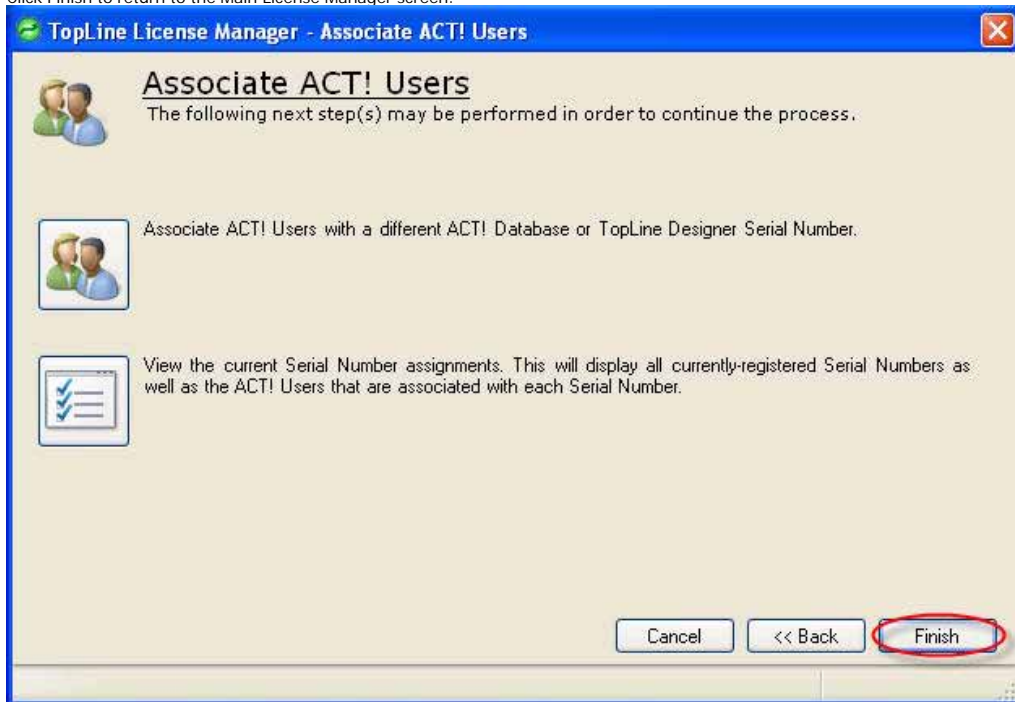
4. Select the TopLine Designer serial number (which has remaining, unused licenses)
5. Select the ACT! to have TopLine Designer access (by default, only active ACT! users will be displayed. To view ALL users, click the Include Inactive Users checkbox)
6. Press the Associate ACT! User with Serial Number button to allow the ACT user to have Designer access.



7. Click Next



8. Following the Initial Setup, a window will appear to perform another Initial Setup or continue to the next setup step.
9. Click Finish to return to the Main License Manager screen.



#### See also

[Initial Setup](#)  
[Adding Serial Numbers](#)  
[Viewing / Exporting Configuration](#)

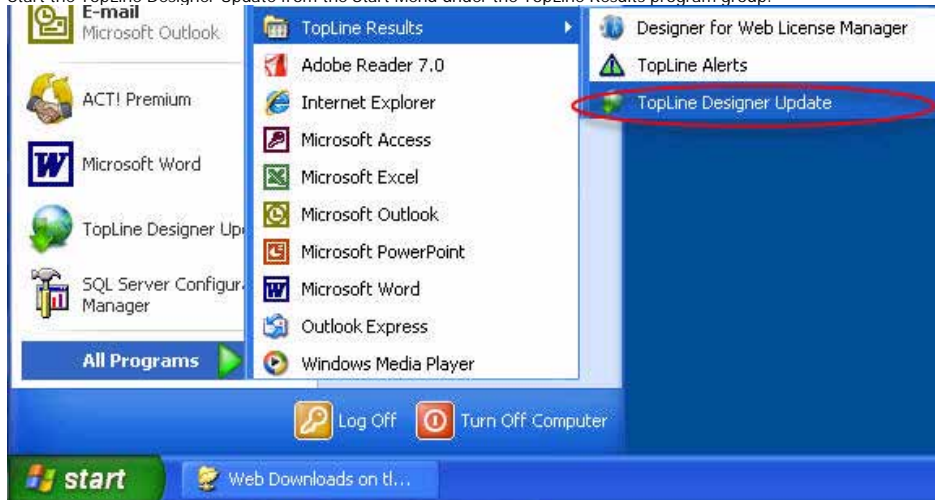
Home > Installation > Obtaining Updates

## Obtaining Updates

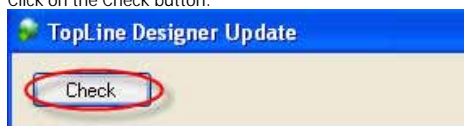
Updates are provided on the TopLine Results website: <http://www.toplineresults.com/products/downloads.htm>

TopLine Designer installs an Update Checker in the Program Groups.

1. Start the TopLine Designer Update from the Start Menu under the TopLine Results program group.



2. Status bars will show the Update program connecting to the TopLine server.
3. Click on the Check button.



4. If an update is available.....

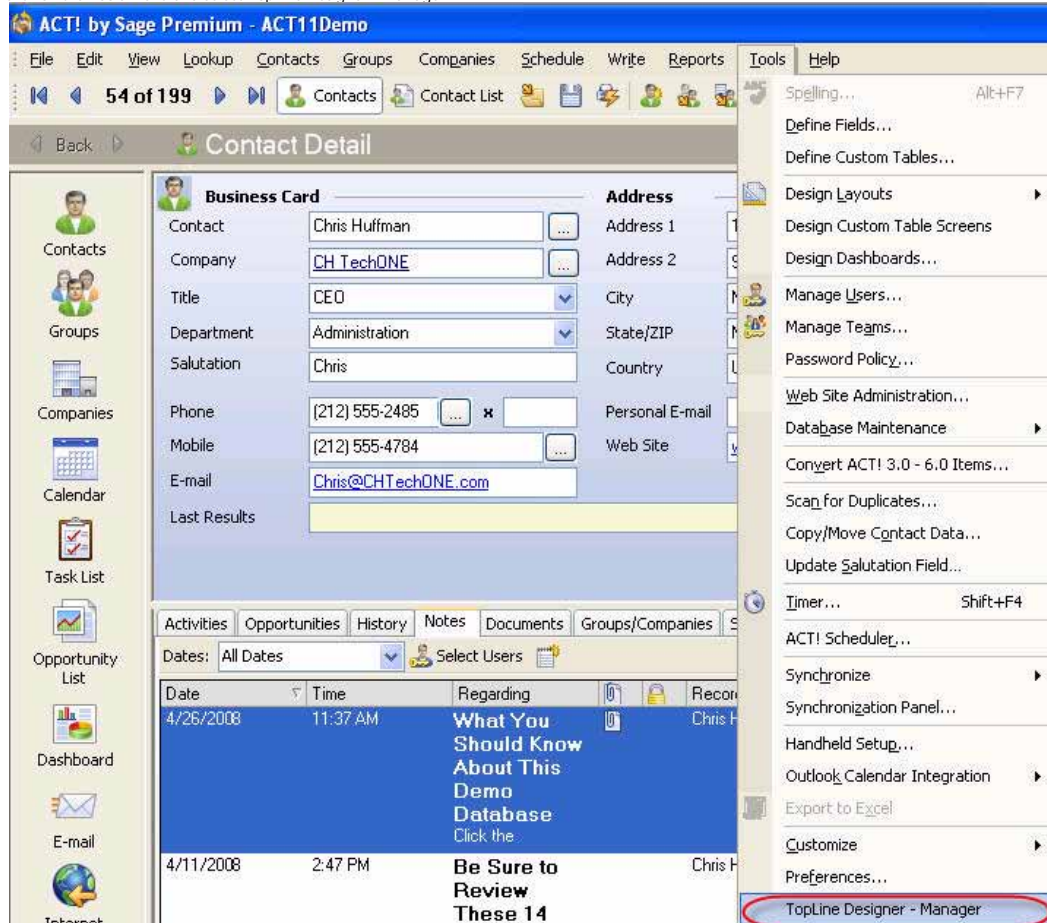
### See also

[System Requirements](#)  
[Obtaining Installation Program](#)  
[Running Installation](#)  
[Activation](#)  
[Web License Manager](#)  
[Displaying Current Version](#)

Home > Installation > Displaying Current Version

## About TopLine Designer - Finding the version you are on...

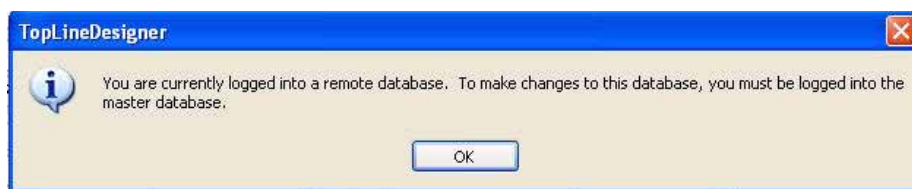
1. Open ACT!
2. Click on the Tools menu and select TopLine Designer - Manager...



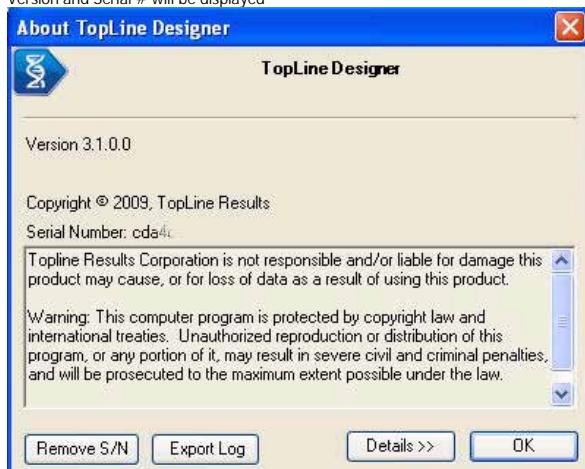
3. If using a Publishing or Non-Publishing, the Entity Manager window will appear. Click on the About button in the lower left hand corner.



4. If using a Remote database, an dialog box will appear with a message about the Entity Manager being unavailable. Click Ok to see the version information.



5. Version and Serial # will be displayed



## See also

[System Requirements](#)  
[Obtaining Installation Program](#)  
[Running Installation](#)  
[Activation](#)  
[Web License Manager](#)  
[Obtaining Updates](#)

[Home](#) > [Administrator Functions](#)

With TopLine Designer, the Administrator can:

- Build relationships between contact, company or group tables.
- Build relationships between custom tables allowing for parent-child relationships.
- Build screens with one or more embedded custom tables.
- Create new fields and field calculations.
- Use scripting to perform advanced calculations, task automation and to vary field appearance based on conditions (auto hide, change color and more).
- Design, color code and embed your layout screens.
- Use snippets and scripting to add new functionality easily in .NET.
- Import/export the TopLine Designer customizations.
- Import data into your custom tables from any OLEDB-compatible data source, CSV file, Excel spreadsheet; or SQL, Oracle, or MS Access database.
- Synchronize and back up custom tables and customizations.
- Protect your database. Only the ACT! Administrator can perform customizations.

### Articles in this section



[Applying Preconfigured Template](#)



[Managing Tables](#)



[Managing Custom Table Screens](#)



[Migrating Data](#)



[Importing Data](#)



[Managing Word Templates](#)



[Managing Schema](#)

### See also

[Welcome](#)  
[Installation](#)  
[End User Functions](#)  
[Windows vs Web Functionality](#)  
[Integration with TopLine Dash](#)  
[FAQ](#)  
[Videos](#)

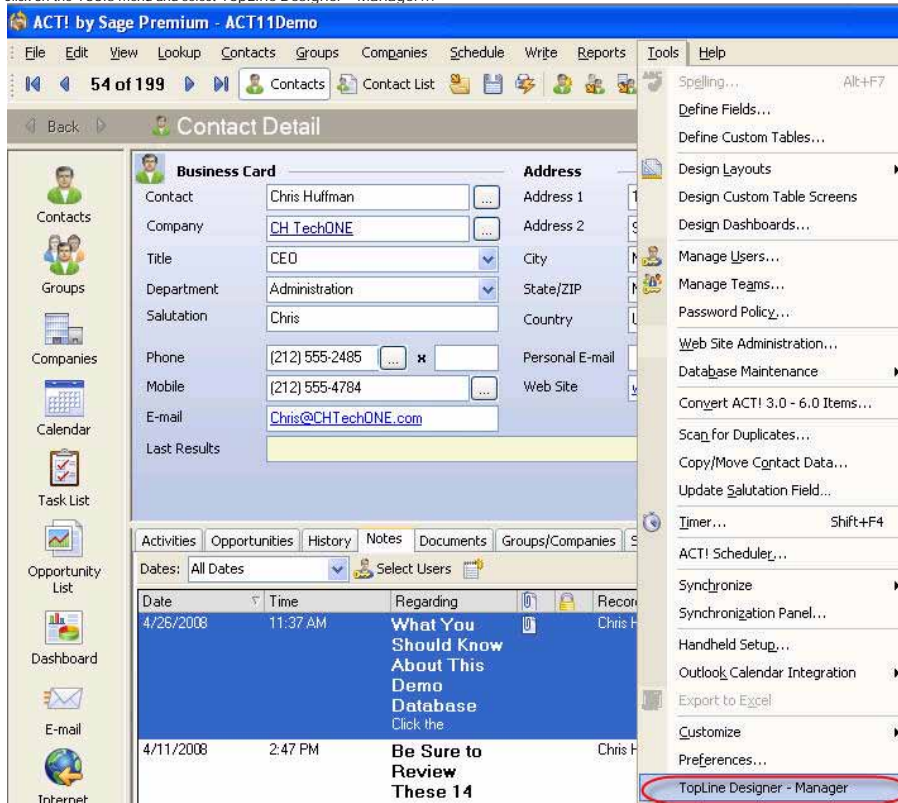
Home > Administrator Functions > Applying Preconfigured Template

## Applying Preconfigured Template

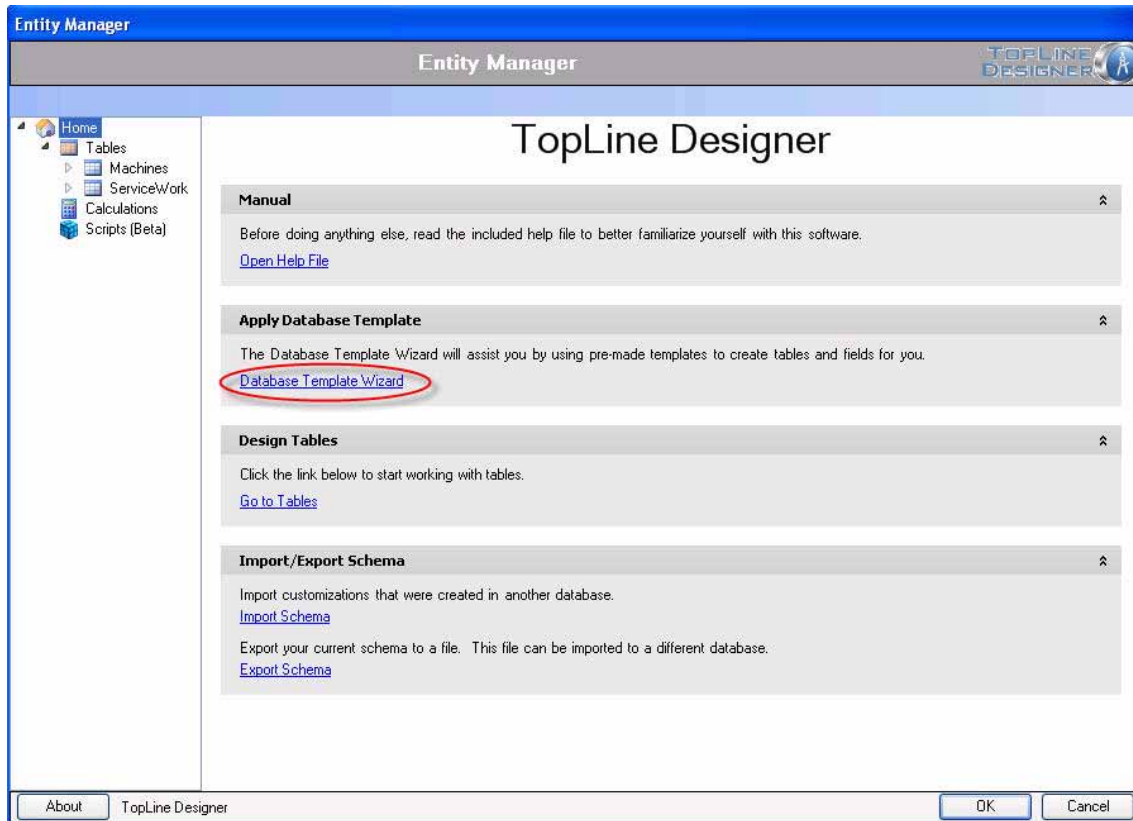
The fastest way to get started is to apply one of the built-in templates provided. This will automatically add new tables and fields to your database to help you get started.

Please note: It is strongly recommended that you back up your database before you continue.

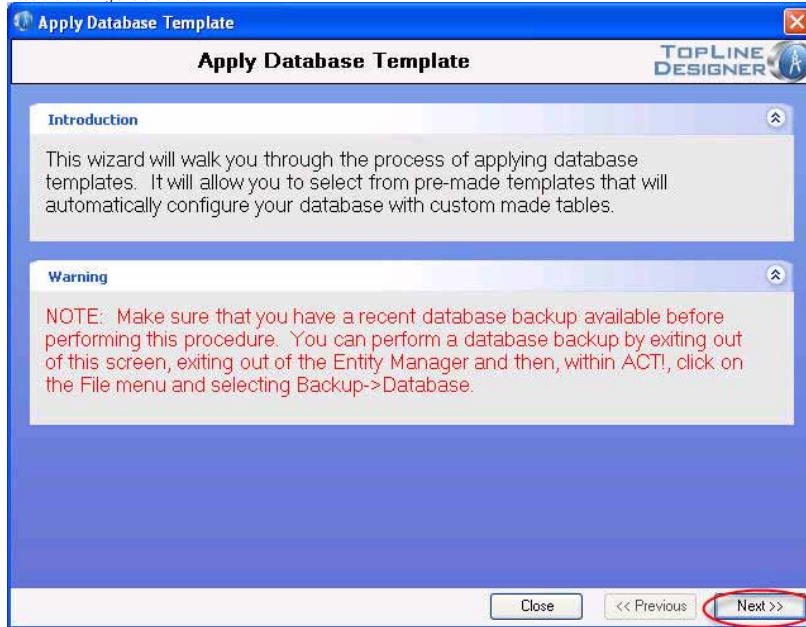
1. Open ACT!
2. Click on the Tools menu and select TopLine Designer - Manager...



3. Click on the Database Template Wizard link

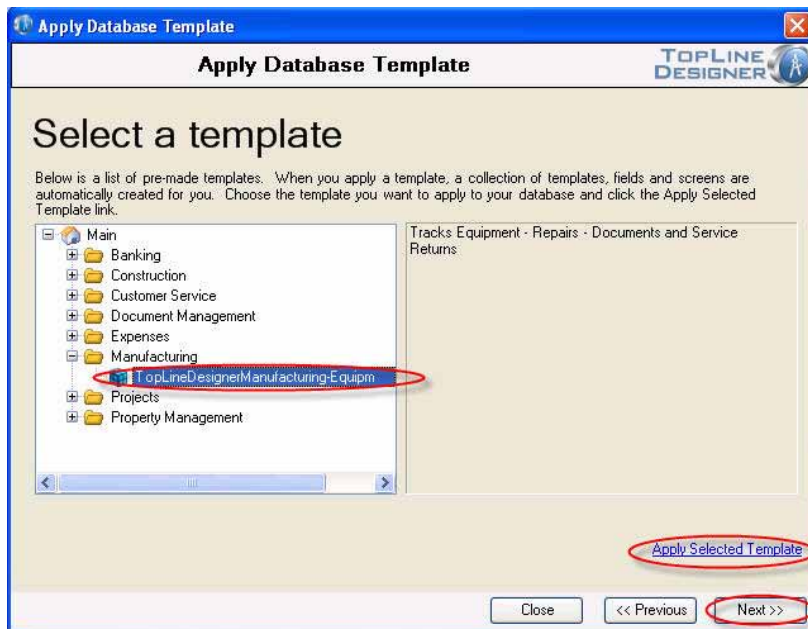


4. Read the warning and click Next



5. Select a preconfigured template from the categories listed.

6. Click on the active Apply Selected Template link. NOTE: The template will not be applied until this link is clicked.



7. An ImportLog will open and show the template's status.
8. Click Finish to close the Apply Database Template window.



#### See also

[Managing Tables](#)  
[Managing Custom Table Screens](#)  
[Migrating Data](#)  
[Importing Data](#)  
[Managing Word Templates](#)  
[Managing Schema](#)

[Home](#) > [Administrator Functions](#) > [Managing Tables](#)

## Managing Tables

The Administrator can perform the following operations on a master database with TopLine Designer:

- Create a new custom table
- Edit the attributes of an existing custom table
- Delete an existing custom table
- Define relationships between custom tables
- Create new custom table fields
- Edit existing custom table fields
- Delete existing custom table fields
- Assign field security to custom table fields

### Articles in this section



[Create a New Table](#)



[Editing an Existing Table](#)



[Deleting an Existing Table](#)



[Creating Fields](#)



[Editing Fields](#)



[Deleting Fields](#)



[Assigning Field Security](#)



[Defining Relationships](#)

### See also

[Applying Preconfigured Template](#)  
[Managing Custom Table Screens](#)  
[Migrating Data](#)  
[Importing Data](#)  
[Managing Word Templates](#)  
[Managing Schema](#)

Home > Administrator Functions > Managing Tables > Create a New Table

## Create a New Table

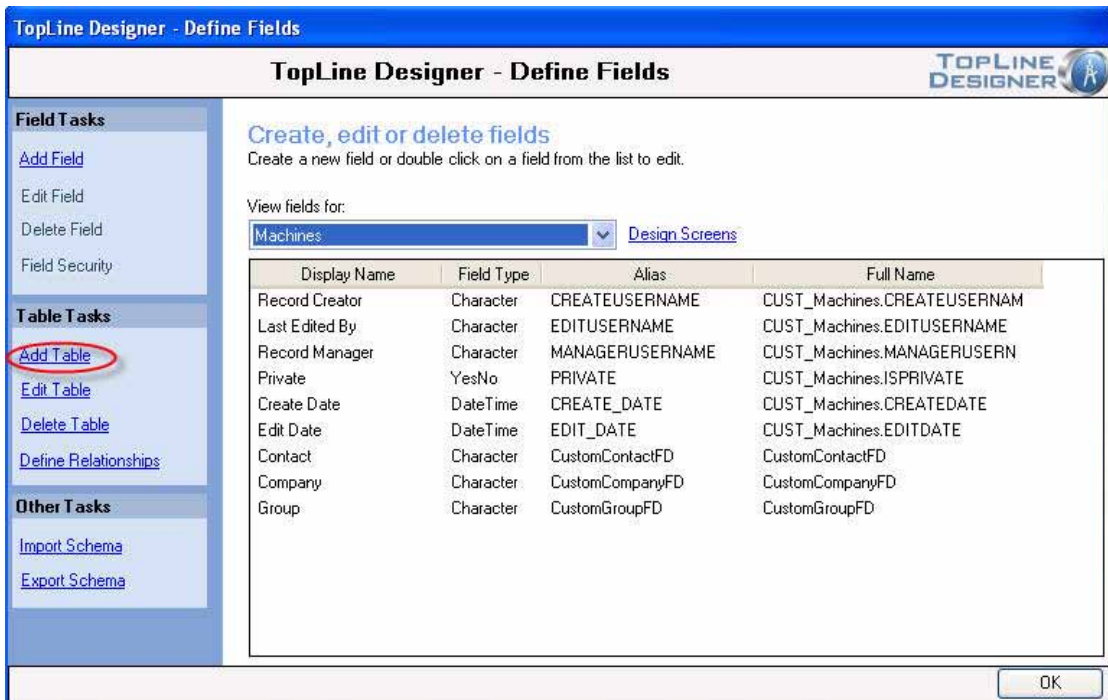
Creating a new sub-entity is easy.

1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...

The screenshot shows the ACT! by Sage Premium interface. The main window displays the 'Contact Detail' for Chris Huffman, CEO of CH TechONE. The 'Tools' menu is open, and 'Define Custom Tables...' is highlighted with a red circle. The interface includes a menu bar (File, Edit, View, Lookup, Contacts, Groups, Companies, Schedule, Write, Reports, Tools, Help), a toolbar, and a sidebar with navigation icons for Contacts, Groups, Companies, Calendar, Task List, Opportunity List, Dashboard, and E-mail. At the bottom, there is an 'Activities' section with a table of tasks.

Type	Date	Time	Priority	Sche
	8/9/2008	9:30 AM	Medium-Low	Chris
	8/12/2008	7:00 AM	Low	Chris
	8/15/2008	8:30 AM	Medium	+Bet
	8/15/2008	4:00 PM	Medium-Low	Chris
	8/22/2008	8:30 AM	Medium	+Fre
	9/1/2008	8:00 AM	Low	Chris
	9/2/2008	12:00 PM	High	Chris
	9/3/2008	6:30 PM	Medium-Low	Chris
	9/12/2008	8:00 AM	Medium	+Em
	9/19/2008	4:00 PM	Medium	Chris

3. Click the Add Table link



4. A wizard will display to guide you through the process of creating a new table. Click Next to begin.



5. Type the name of the table into the field under Table Name. The table name is usually plural since multiple records will be stored within this table. Below, you will select the ACT! primary entities you want to link this table. All custom sub-entities must be linked to one or more primary entities in ACT!.

**Table Wizard**

Table Name

Please type in the name of the table.

Machines

**ACT! Linked Entities**

Which ACT! entities should this table link to?

Contact     Company     Group

Close    << Previous    **Next >>**

## 6. Table Properties

## 1. Layout Tabs

Placing a checkmark in these boxes will add a new tab to the contact, company or group layout for this table.

## 2. Lookup Menu

Selecting Yes will add a new menu item to the Lookup menu which allows you to perform a lookup on records in this table. The result will be a lookup of contacts, companies or groups.

## 3. View Menu

Selecting Yes will add a new menu item to the View menu. This allows you to view and filter a list of all of the records in this table.

**Table Wizard**

**Layout Tabs**

Would you like TopLine Designer to create a new tab in the ACT! layout for this table?

Create a new tab in the Contact layout.     Create a new tab in the Company layout.

Create a new tab in the Group layout.

**Lookup Menu**

Should TopLine Designer add a new menu item for this table under the Lookup menu? This allows you to perform a search on the this table and return a list of ACT! contacts or companies that meeting the condition.

Yes     No

**View Menu**

Should TopLine Designer add a new menu item for this table under the View menu? This will show a list of all records for this entity with the ability to filter the list. You can select which fields to filter on after you have created all of your fields.

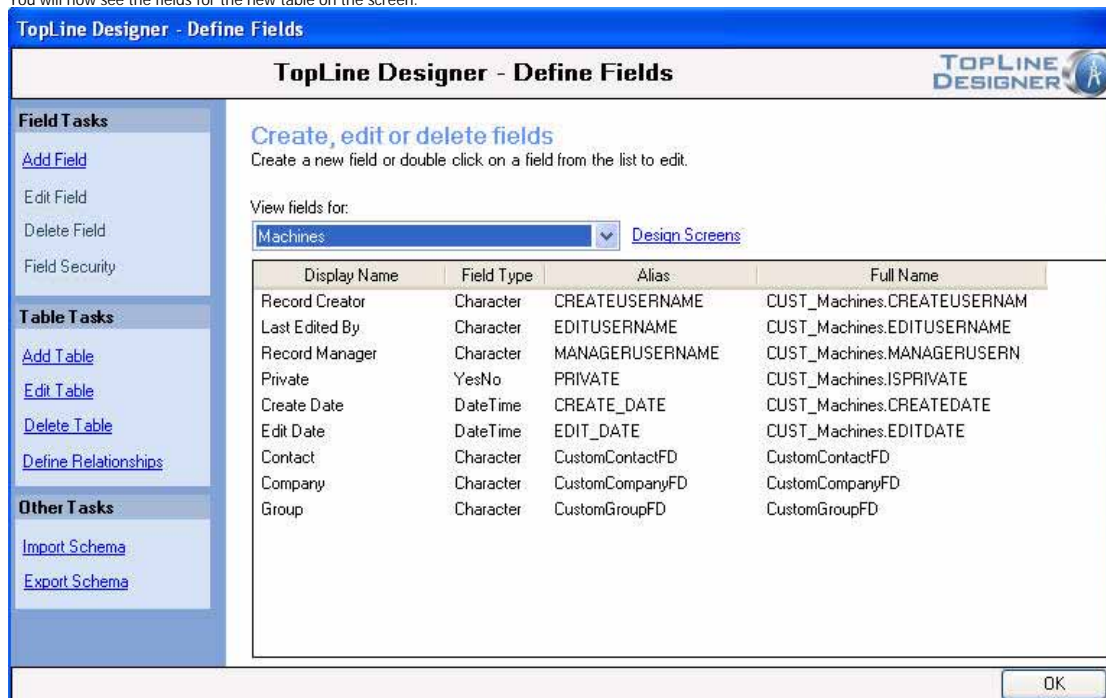
Yes     No

Close    << Previous    **Next >>**

## 7. Click the Finish button to create your table.



You will now see the fields for the new table on the screen.



## See also

[Editing an Existing Table](#)  
[Deleting an Existing Table](#)  
[Creating Fields](#)  
[Editing Fields](#)  
[Deleting Fields](#)  
[Assigning Field Security](#)  
[Defining Relationships](#)

Home > Administrator Functions > Managing Tables > Editing an Existing Table

## Editing an Existing Table

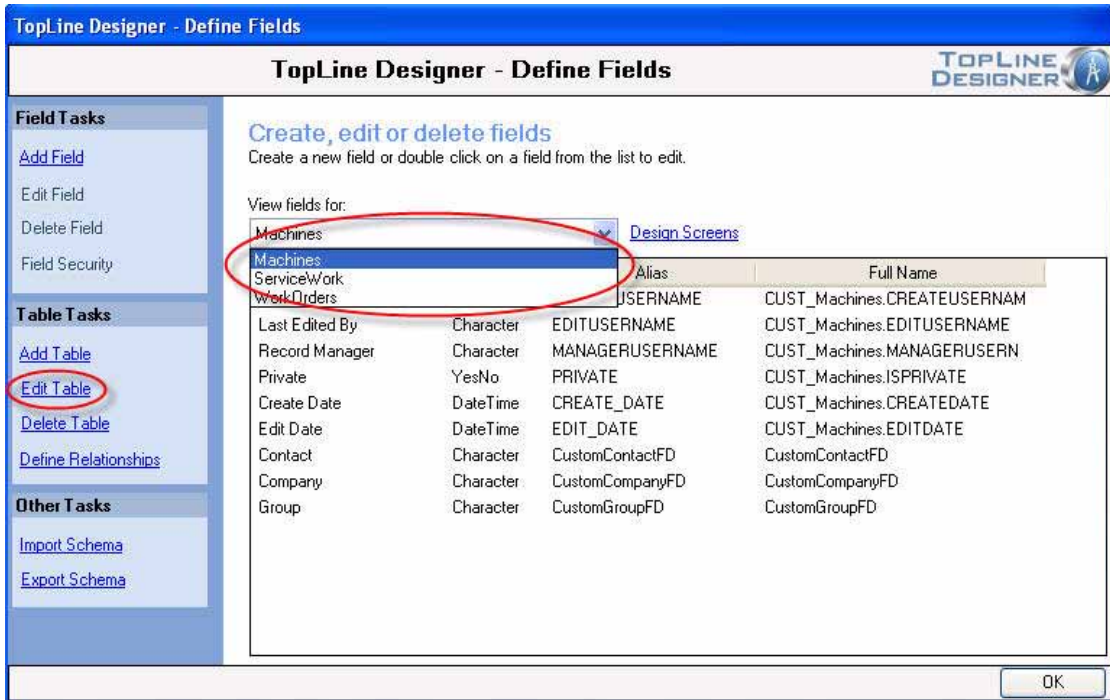
Editing an existing custom table is easy.

1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...

The screenshot shows the ACT! by Sage Premium software interface. The 'Tools' menu is open, and 'Define Custom Tables...' is highlighted with a red circle. The main window displays a 'Contact Detail' form for Chris Huffman, CEO of CH TechONE. Below the form is a table of activities.

Type	Date	Time	Priority	Sche
	8/9/2008	9:30 AM	Medium-Low	Chris
	8/12/2008	7:00 AM	Low	Chris
	8/15/2008	8:30 AM	Medium	+Bet
	8/15/2008	4:00 PM	Medium-Low	Chris
	8/22/2008	8:30 AM	Medium	+Fre
	9/1/2008	8:00 AM	Low	Chris
	9/2/2008	12:00 PM	High	Chris
	9/3/2008	6:30 PM	Medium-Low	Chris
	9/12/2008	8:00 AM	Medium	+Em
	9/19/2008	4:00 PM	Medium	Chris

3. Select the appropriate custom table from the dropdown and click on the Edit Table link



- A wizard will display to guide you through the process of editing the table. Click Next to begin.



- The table name and ACT linked entities cannot be modified for existing tables.

**Table Wizard**

**Table Name**

Please type in the name of the table.

Machines

**ACT! Linked Entities**

Which ACT! entities should this table link to?

Contact     Company     Group

Close    << Previous    **Next >>**

6. Table Properties can be modified.
1. Layout Tabs  
Placing a check mark in these boxes will add a new tab to the contact, company or group layout for this table.
  2. Lookup Menu  
Selecting Yes will add a new menu item to the Lookup menu which allows you to perform a lookup on records in this table. The result will be a lookup of contacts, companies or groups.
  3. View Menu  
Selecting Yes will add a new menu item to the View menu. This allows you to view and filter a list of all of the records in this table.

**Table Wizard**

**Layout Tabs**

Would you like TopLine Designer to create a new tab in the ACT! layout for this table?

Create a new tab in the Contact layout.     Create a new tab in the Company layout.

Create a new tab in the Group layout.

**Lookup Menu**

Should TopLine Designer add a new menu item for this table under the Lookup menu?  
This allows you to perform a search on the this table and return a list of ACT! contacts or companies that meeting the condition.

Yes     No

**View Menu**

Should TopLine Designer add a new menu item for this table under the View menu? This will show a list of all records for this entity with the ability to filter the list. You can select which fields to filter on after you have created all of your fields.

Yes     No

Close    << Previous    **Next >>**

7. Click the Finish button to modify your table.



See also

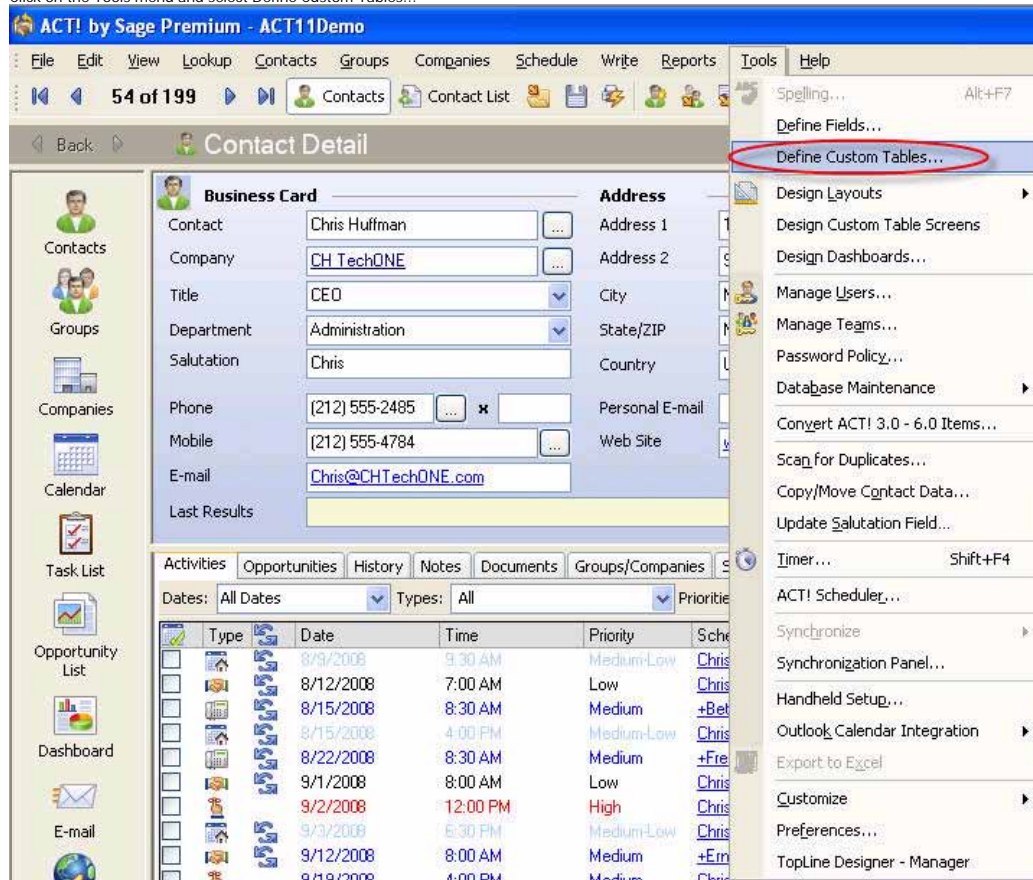
- [Create a New Table](#)
- [Deleting an Existing Table](#)
- [Creating Fields](#)
- [Editing Fields](#)
- [Deleting Fields](#)
- [Assigning Field Security](#)
- [Defining Relationships](#)

Home > Administrator Functions > Managing Tables > Deleting an Existing Table

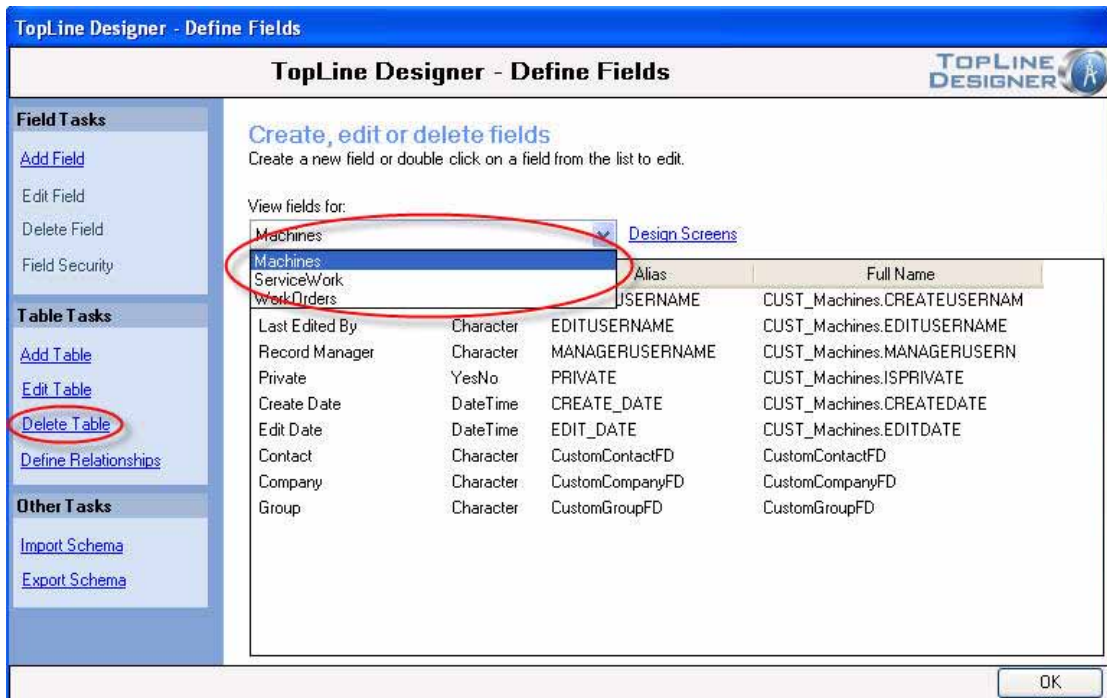
## Deleting an Existing Table

Deleting an existing custom table is easy.

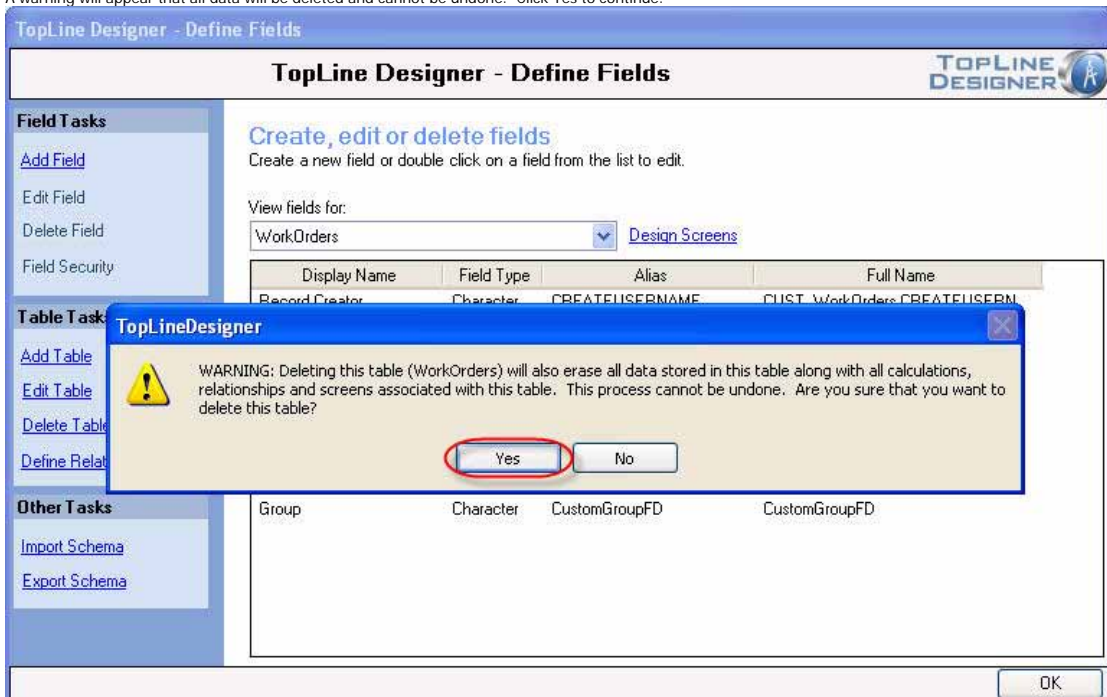
1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...



3. Select the appropriate custom table from the dropdown and click on the Delete Table link.



4. A warning will appear that all data will be deleted and cannot be undone. Click Yes to continue.



5. A confirmation box will appear. Click Yes to actually delete the custom table.

Should an error occur while deleting a table, the following procedure should be used:

1. Start ACTDIAG
2. Detach the database from SQL.
3. Close ACTDIAG
4. Start ACT
5. Open the database using the .ADF file to have SQL repair the database
6. Delete the custom table again

See also

[Create a New Table](#)  
[Editing an Existing Table](#)  
[Creating Fields](#)  
[Editing Fields](#)  
[Deleting Fields](#)

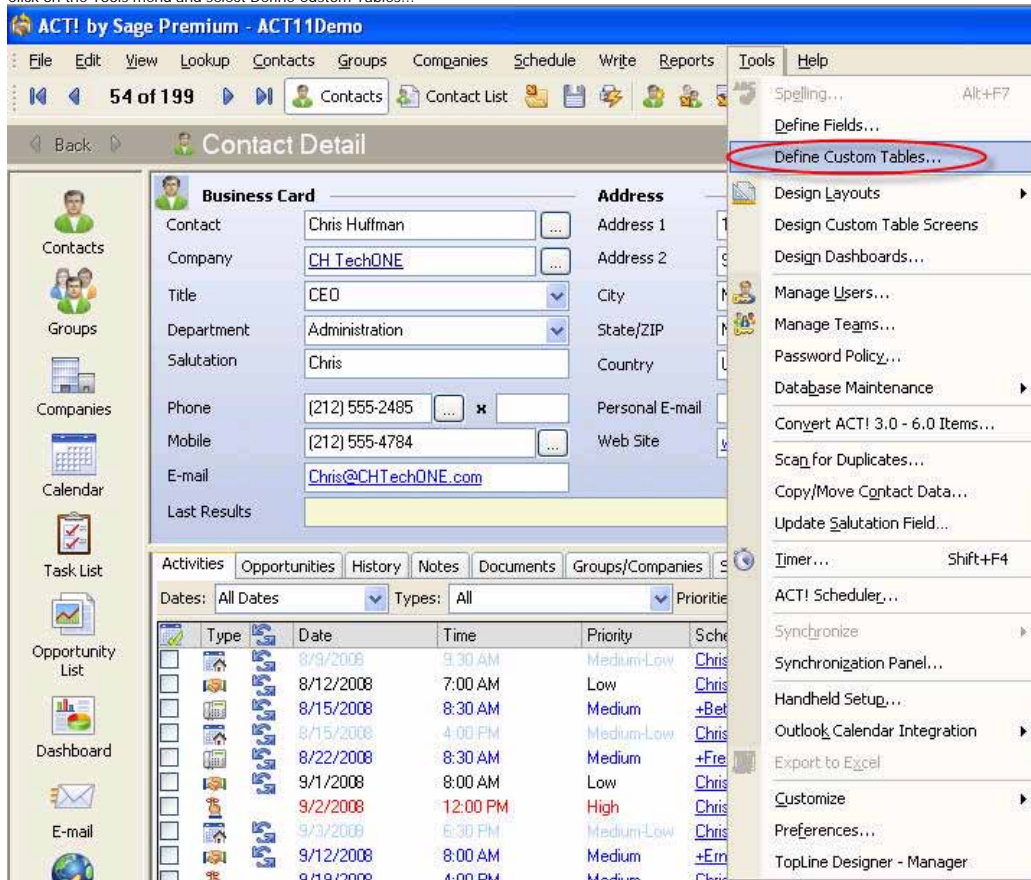
Assigning Field Security  
Defining Relationships

Home > Administrator Functions > Managing Tables > Creating Fields

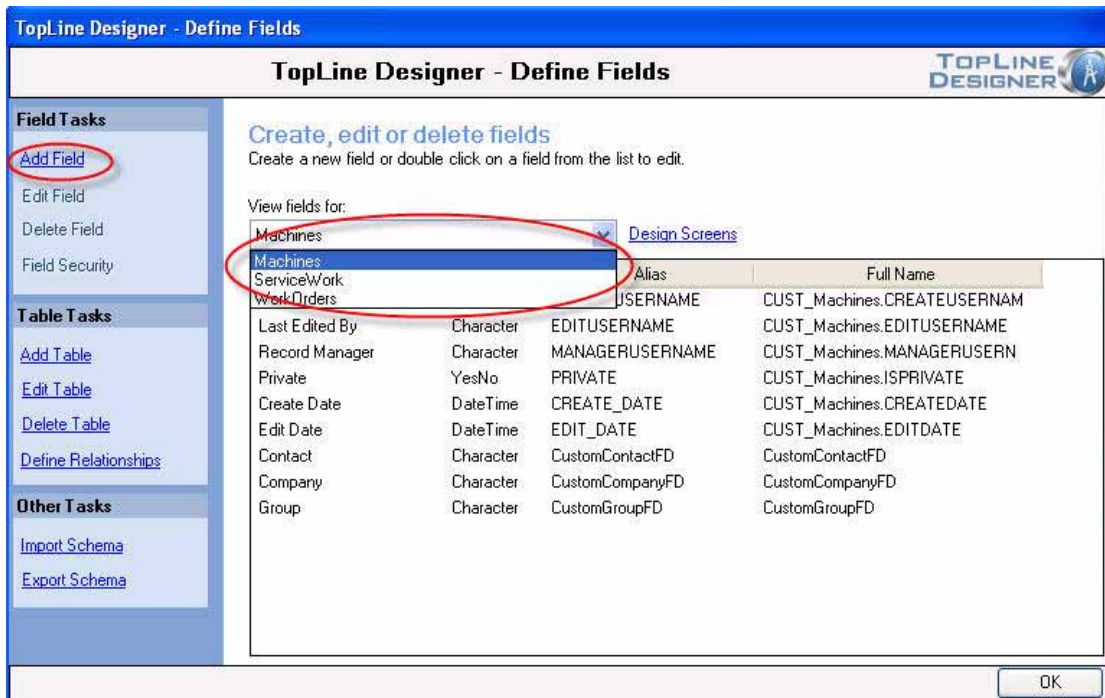
## Creating Fields

Numerous fields can be created in a custom table.

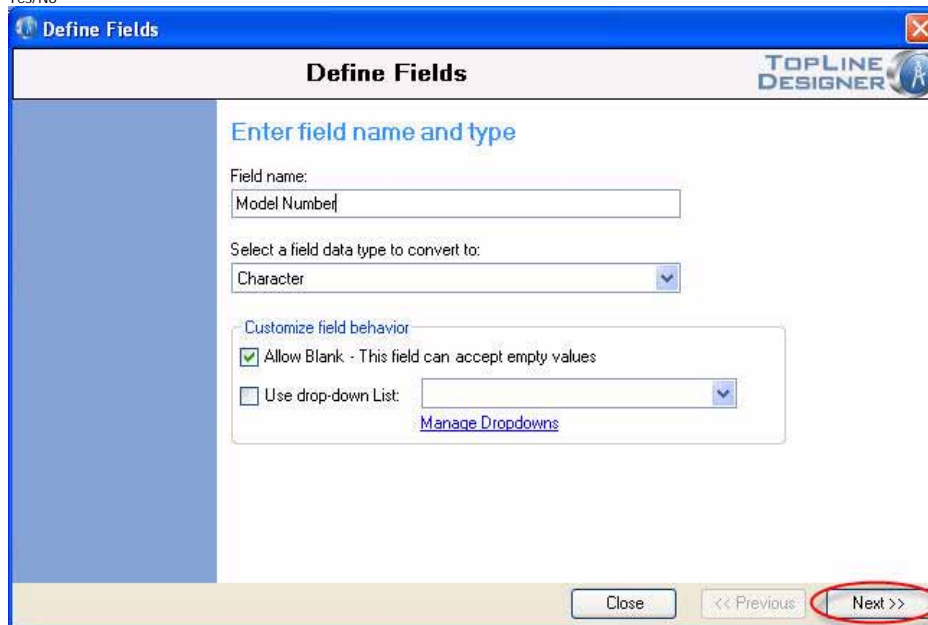
1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...



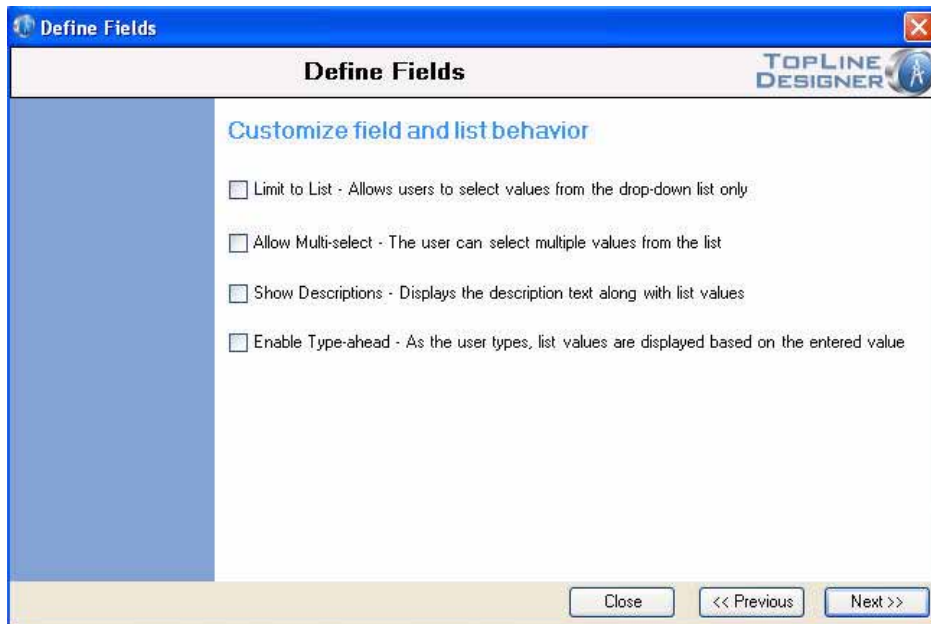
3. Select the appropriate custom table from the dropdown and click on the Add Field link



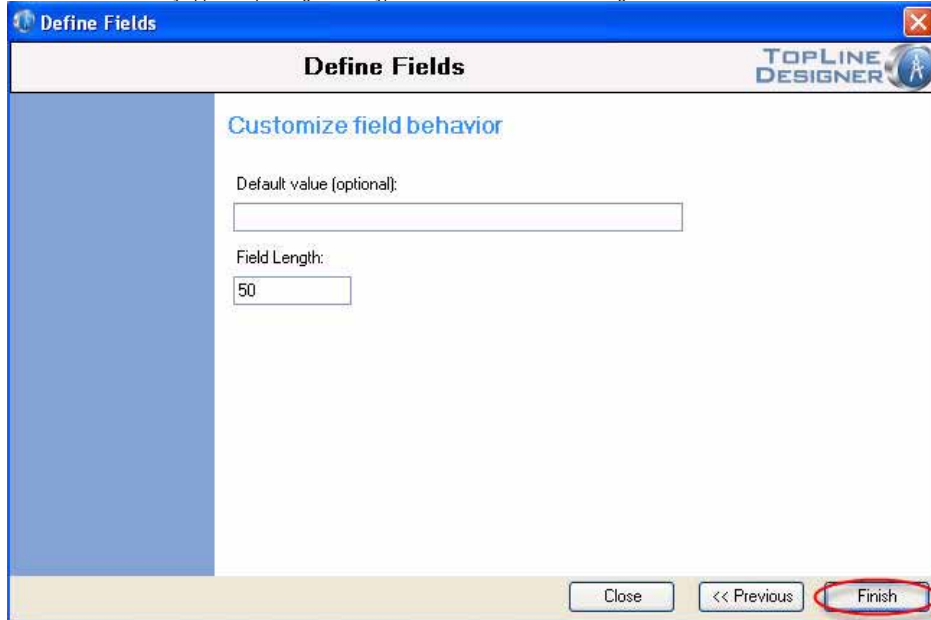
4. Enter a name for the new field. Select the field type from the choices of:
1. Annual Event
  2. Character
  3. Currency
  4. Date
  5. DateTime
  6. Decimal
  7. Initial Caps
  8. Lowercase
  9. Memo
  10. Number
  11. Time
  12. Uppercase
  13. URL
  14. Yes/No



5. The checkbox of Allow Blank indicates whether the field is required.
6. A dropdown list can be assigned to the field (depending on the type). Designer allows you to access the dropdown management screen from this area.
7. An additional screen may appear when using dropdowns to Limit to List, Allow Multi-Select, Show Descriptions and Enable Type Ahead, just like typical ACT fields.



8. An additional screen may appear depending on field type for Default Value and Field Length.



9. Click Finish to create the new field and return the Define Fields screen.

### See also

[Create a New Table](#)  
[Editing an Existing Table](#)  
[Deleting an Existing Table](#)  
[Editing Fields](#)  
[Deleting Fields](#)  
[Assigning Field Security](#)  
[Defining Relationships](#)

Home > Administrator Functions > Managing Tables > Editing Fields

## Editing Fields

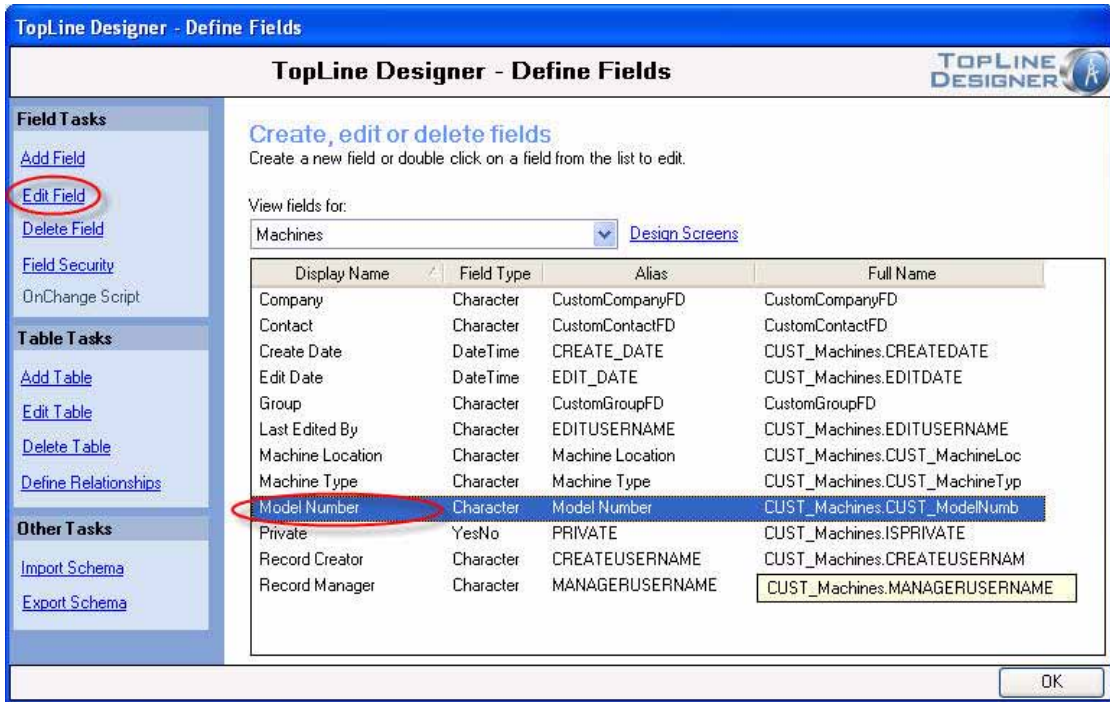
Like typical ACT! fields, custom table fields can be edited and have their properties changed. NOTE: System custom table fields cannot be edited.

1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...

The screenshot shows the ACT! software interface. The 'Tools' menu is open, and 'Define Custom Tables...' is highlighted with a red circle. The main window displays a 'Contact Detail' form for Chris Huffman, CEO of CH TechONE. Below the form is a table of activities.

Type	Date	Time	Priority	Sche
	8/9/2008	9:30 AM	Medium-Low	Chris
	8/12/2008	7:00 AM	Low	Chris
	8/15/2008	8:30 AM	Medium	+Bet
	8/15/2008	4:00 PM	Medium-Low	Chris
	8/22/2008	8:30 AM	Medium	+Fre
	9/1/2008	8:00 AM	Low	Chris
	9/2/2008	12:00 PM	High	Chris
	9/3/2008	6:30 PM	Medium-Low	Chris
	9/12/2008	8:00 AM	Medium	+Em
	9/19/2008	4:00 PM	Medium	Chris

3. Select the appropriate custom table from the dropdown, highlight the desired custom field and click the Edit Field link



4. Make the appropriate changes and click Finish to return to the Define Fields screen.

### See also

[Create a New Table](#)  
[Editing an Existing Table](#)  
[Deleting an Existing Table](#)  
[Creating Fields](#)  
[Deleting Fields](#)  
[Assigning Field Security](#)  
[Defining Relationships](#)

Home > Administrator Functions > Managing Tables > Deleting Fields

## Deleting Fields

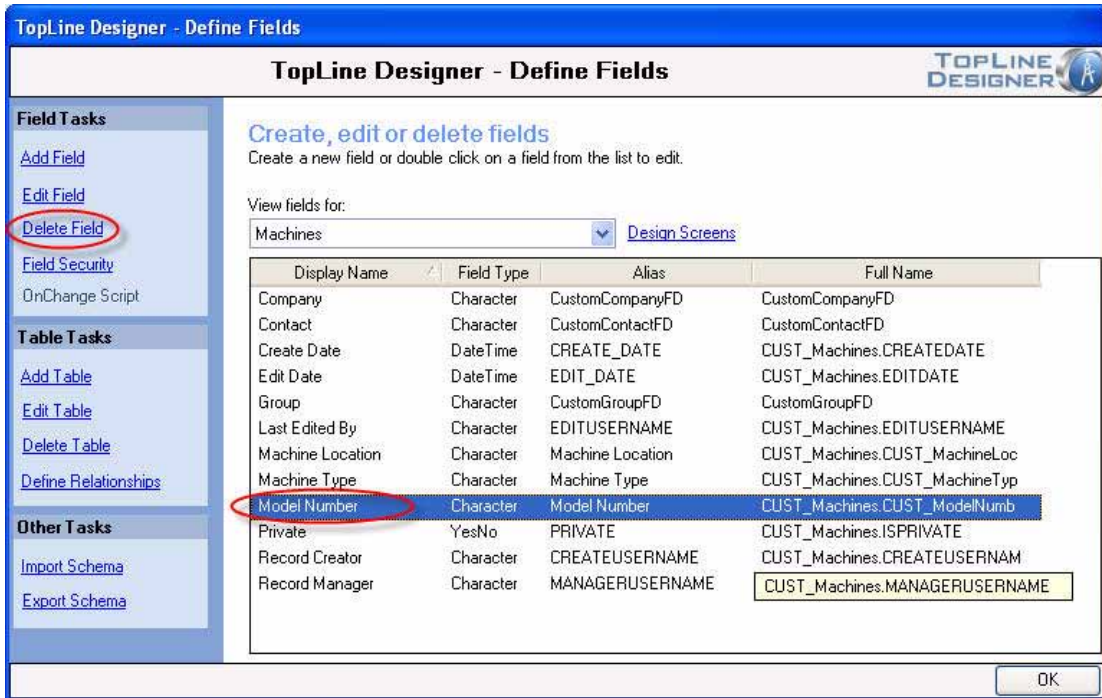
Just like typical ACT fields, custom table fields can be deleted. NOTE: System custom table fields cannot be deleted.

1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...

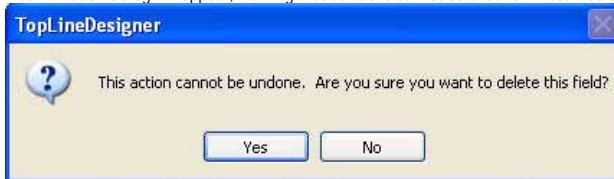
The screenshot shows the ACT! by Sage Premium - ACT11Demo application interface. The 'Tools' menu is open, and 'Define Custom Tables...' is highlighted with a red circle. The main window displays a 'Contact Detail' form for Chris Huffman, CEO of CH TechONE. Below the form is a table of activities.

Type	Date	Time	Priority	Schedule
	8/9/2008	9:30 AM	Medium-Low	Chris
	8/12/2008	7:00 AM	Low	Chris
	8/15/2008	8:30 AM	Medium	+Bet
	8/15/2008	4:00 PM	Medium-Low	Chris
	8/22/2008	8:30 AM	Medium	+Fre
	9/1/2008	8:00 AM	Low	Chris
	9/2/2008	12:00 PM	High	Chris
	9/3/2008	6:30 PM	Medium-Low	Chris
	9/12/2008	8:00 AM	Medium	+Ern
	9/19/2008	4:00 PM	Medium	Chris

3. Select the appropriate custom table from the dropdown, highlight the desired custom field and click on the Delete Field link



4. A confirmation dialog will appear, warning that deletions cannot be undone. Press Yes to delete field and return to Define Fields screen.



See also

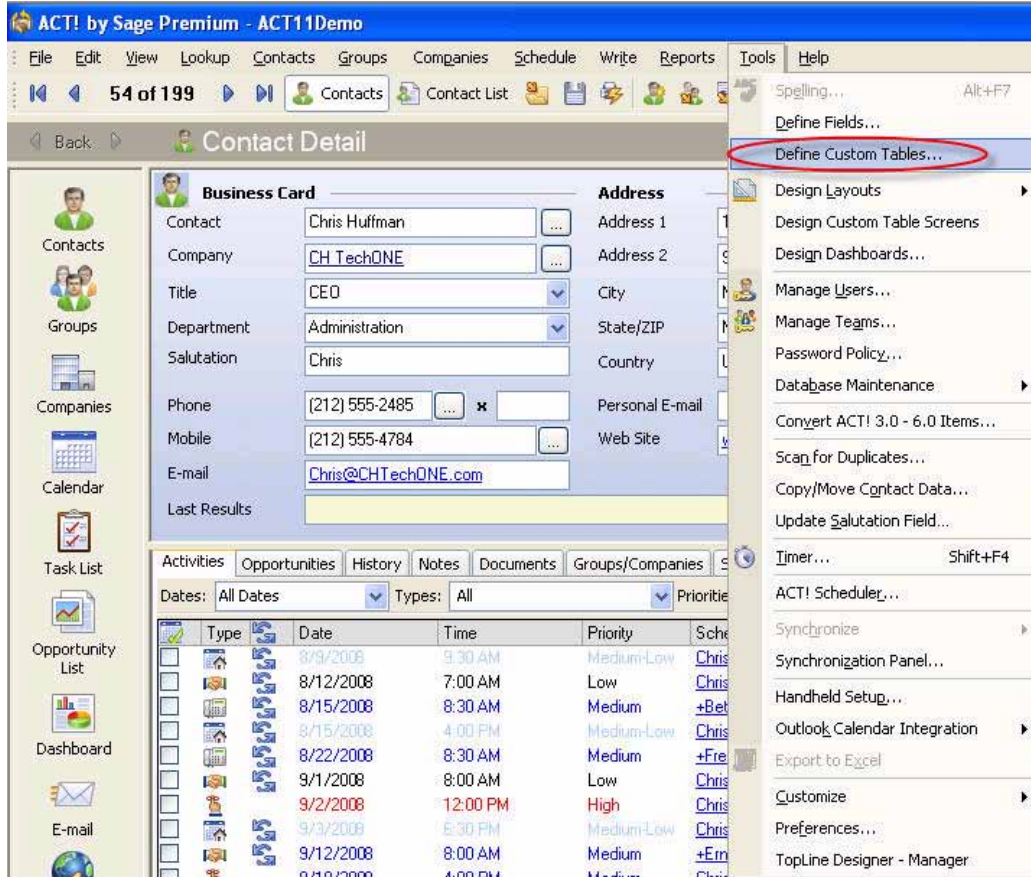
[Create a New Table](#)  
[Editing an Existing Table](#)  
[Deleting an Existing Table](#)  
[Creating Fields](#)  
[Editing Fields](#)  
[Assigning Field Security](#)  
[Defining Relationships](#)

Home > Administrator Functions > Managing Tables > Assigning Field Security

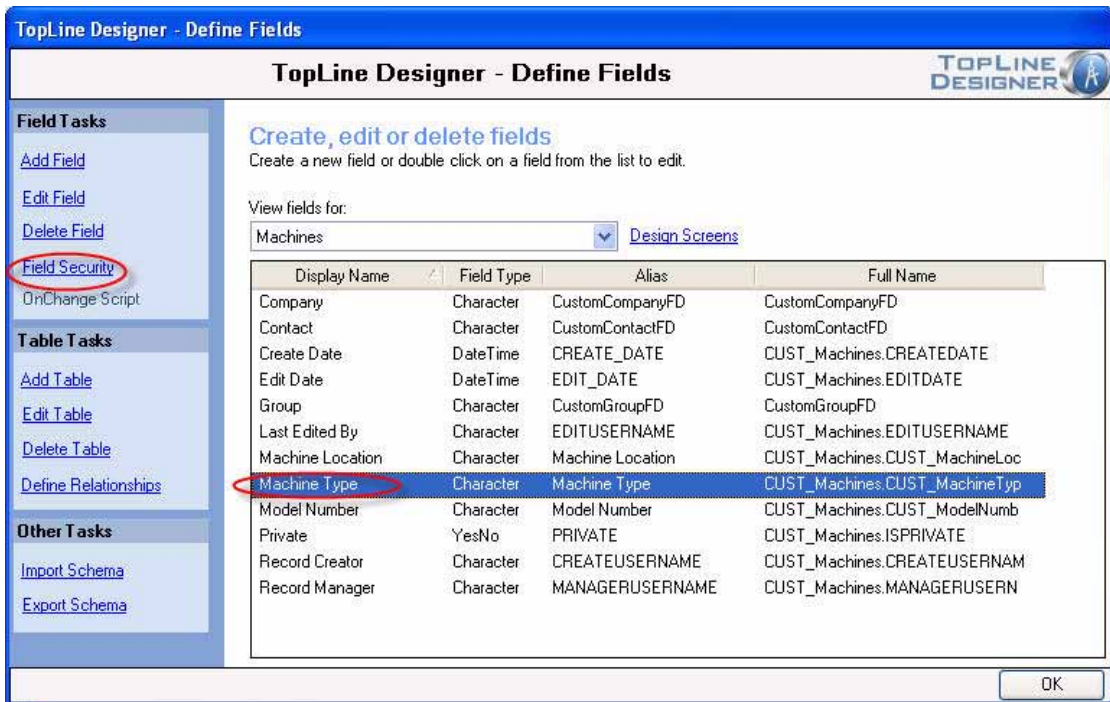
## Assigning Field Security

Like typical ACT! fields, custom table fields can have field level security, both default and by individual user. NOTE: System custom table fields cannot be edited.

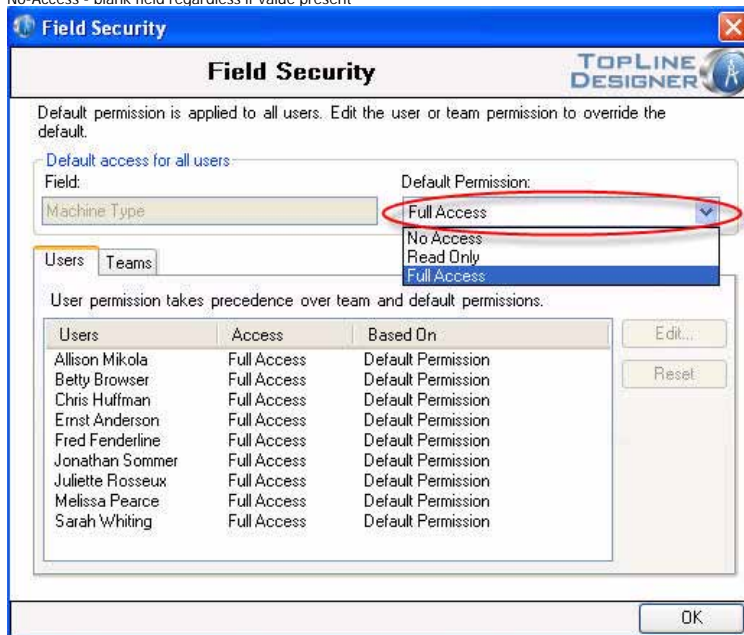
1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...



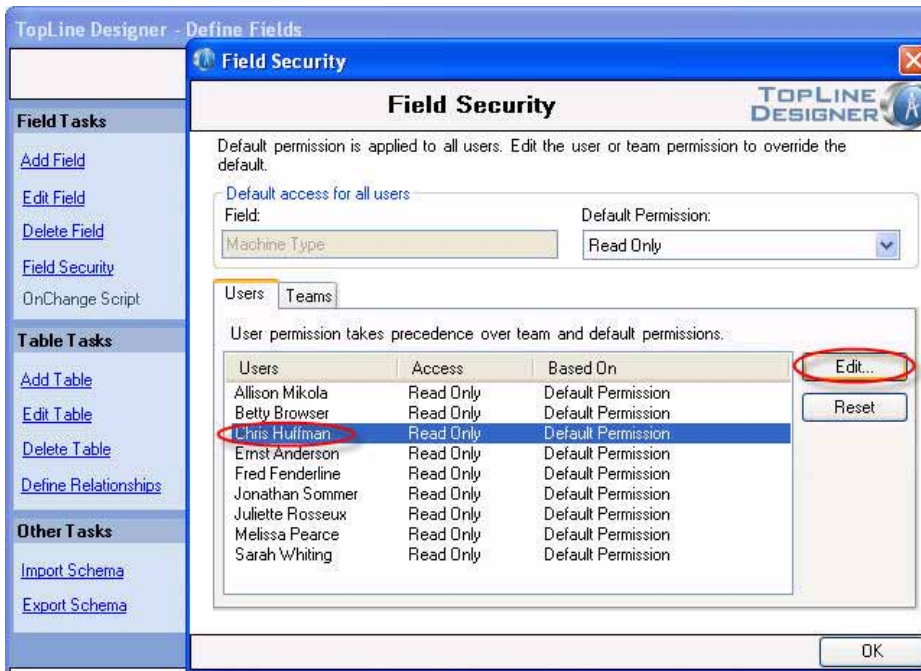
3. Select the appropriate custom table from the dropdown, highlight the desired custom field and click the Field Security link.



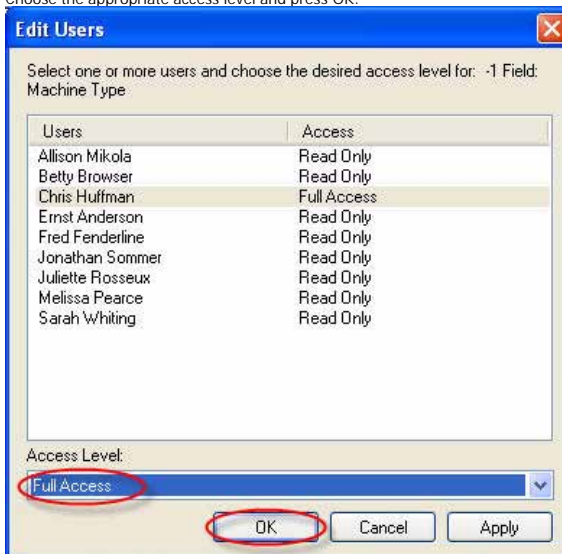
4. Set the default permission from:
  1. Full Access - allowed to view and edit
  2. Read-Only - allowed to view
  3. No-Access - blank field regardless if value present



5. The default permission can be overwritten for an individual user by highlighting the user and pressing the Edit button.



6. Choose the appropriate access level and press OK.



7. Press OK to return to the Define Fields screen.

## See also

[Create a New Table](#)  
[Editing an Existing Table](#)  
[Deleting an Existing Table](#)  
[Creating Fields](#)  
[Editing Fields](#)  
[Deleting Fields](#)  
[Defining Relationships](#)

[Home](#) > [Administrator Functions](#) > [Managing Tables](#) > [Defining Relationships](#)

## Defining Relationships

By default, a relationship is established between Contacts, Companies and Groups with the newly created Custom Table. One record in the Parent (i.e. Contacts), can have many Child records (i.e. Custom Table) associated with it. This type of relationship can also be created between two custom tables. For example, a custom table could contain Service Contracts and a second custom table could contain Service Tickets. There can be several Service Tickets associated with each Service Contract. TopLine Designer allows these types of relationships to be built.

### See also

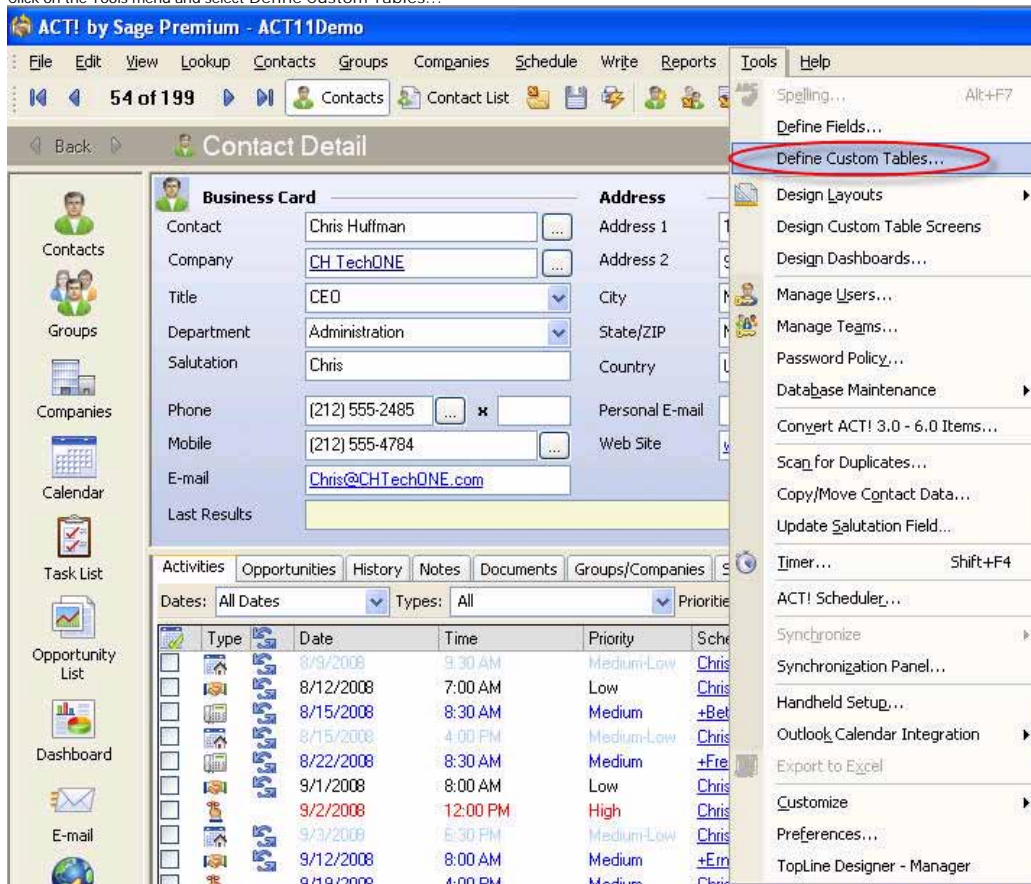
- [Create a New Table](#)
- [Editing an Existing Table](#)
- [Deleting an Existing Table](#)
- [Creating Fields](#)
- [Editing Fields](#)
- [Deleting Fields](#)
- [Assigning Field Security](#)

Home > Administrator Functions > Managing Tables > Defining Relationships > Add Relationship

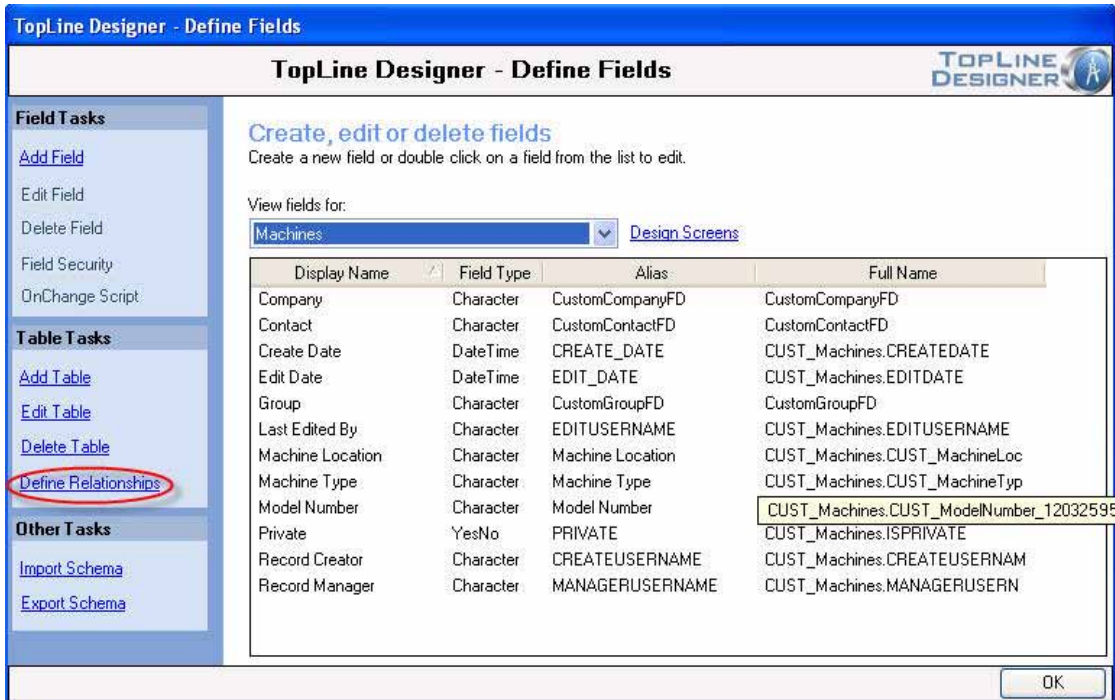
## Add Relationship

To build a new relationship between existing custom tables is easy.

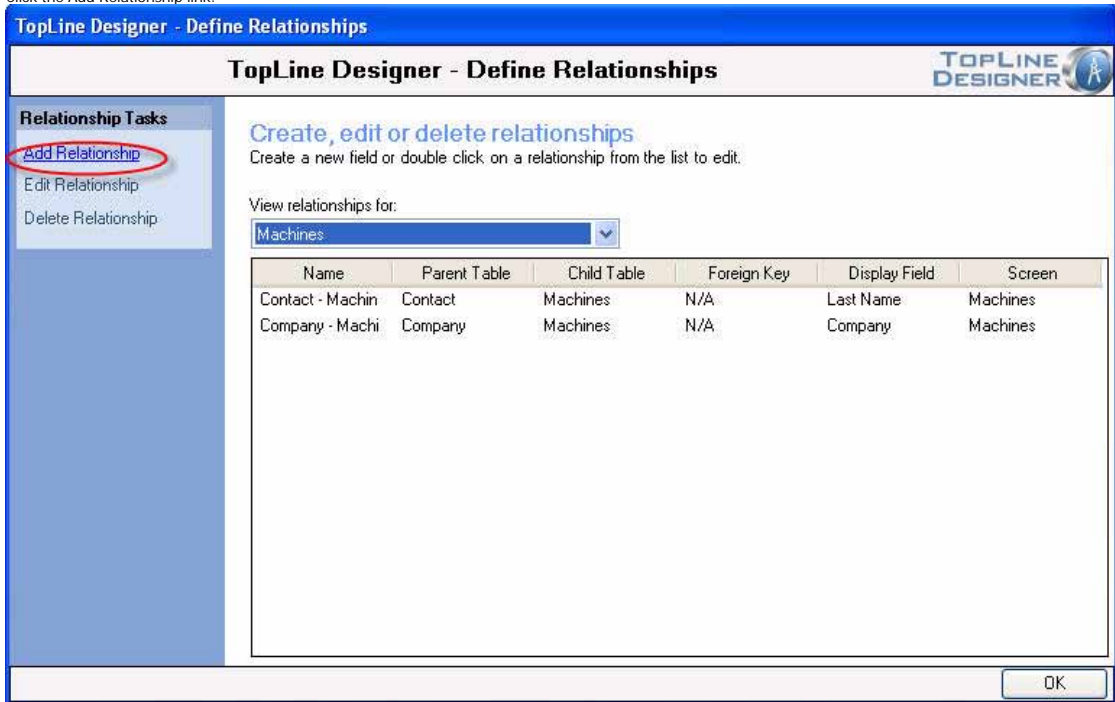
1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...



3. Click the Define Relationship link.



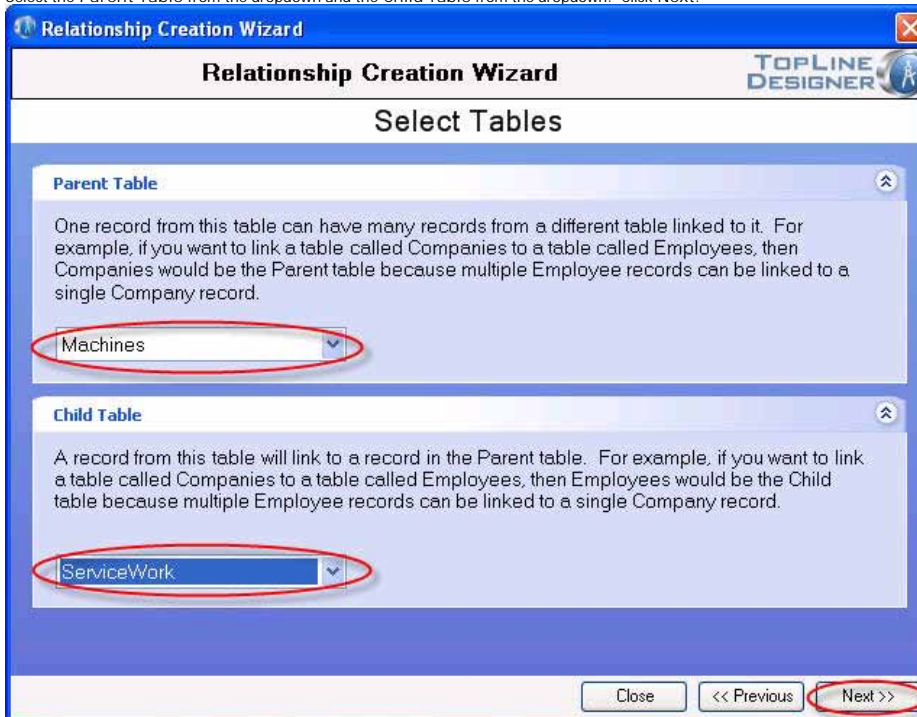
4. Click the Add Relationship link.



5. The Relationship Creation Wizard will appear. Click Next to begin.



6. Select the Parent Table from the dropdown and the Child Table from the dropdown. Click Next.



7. Assign a name to the newly created key which will link the two fields. This Child Table field will hold the special key linking the two tables. Click Next.

The screenshot shows the 'Relationship Creation Wizard' dialog box with the title 'Choose Foreign Key'. The 'Foreign Key' section contains a text box with the word 'Machines' entered. The 'Next >>' button is circled in red.

**Relationship Creation Wizard** TOPLINE DESIGNER

### Choose Foreign Key

**Foreign Key**

A new field will be created in the ServiceWork table. This field will be presented to the user as a lookup field to help link new records from the table you are creating now, to a specific record in the related Machines table. This field is also known as the Foreign Key and should be descriptive of the parent table. Typically, this field is the singular form of the parent table name. For example, if the parent table is Companies, then you should type Company into this field.

Machines

Close << Previous **Next >>**

8. Select the field in the Parent table which will identify it from the Child table or create a brand new field. Click Next.

The screenshot shows the 'Relationship Creation Wizard' dialog box with the title 'Set Primary Field (Display Name)'. The 'Display Name' section contains a dropdown menu with 'Model Number' selected and an empty text box below it. The 'Next >>' button is circled in red.

**Relationship Creation Wizard** TOPLINE DESIGNER

### Set Primary Field (Display Name)

**Display Name**

Now you must specify a field in the parent table (Machines) to be the display name. This should be a field in the Machines table that uniquely identifies one record. For example, in a table called Equipment, the Model Number would represent a unique record. In a Savings Account table, Account Number would be representative of a single/complete record. You can either choose a field below that already exists or you can type in a new name which will create a new field. Fill in only one of the boxes below:

Select an existing field to use as the primary field:

or, Type in the name of a new field to create:

Close << Previous **Next >>**

9. Give the relationship a unique name. Click Next.



10. Click Finish to create the relationship.



11. Click OK to return to the Define Fields screen.

### See also

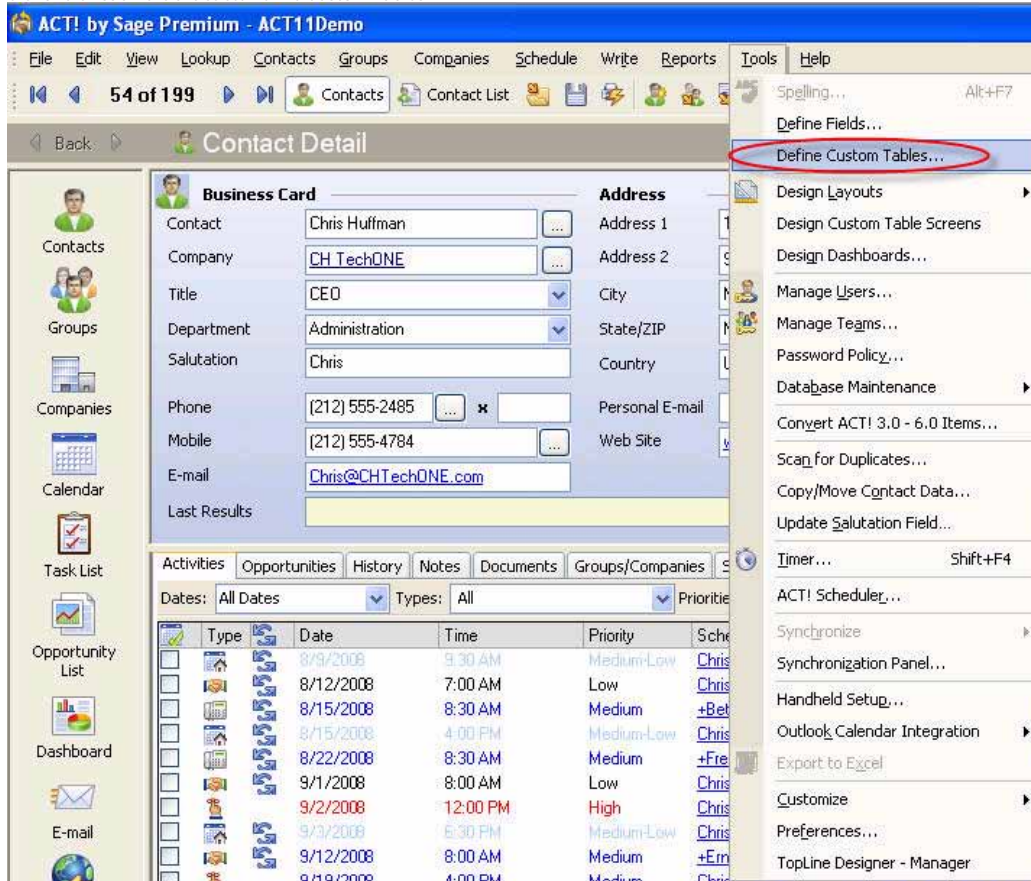
[Edit Relationship](#)  
[Delete Relationship](#)  
[Relationship with Activities and Opps](#)

Home > Administrator Functions > Managing Tables > Defining Relationships > Edit Relationship

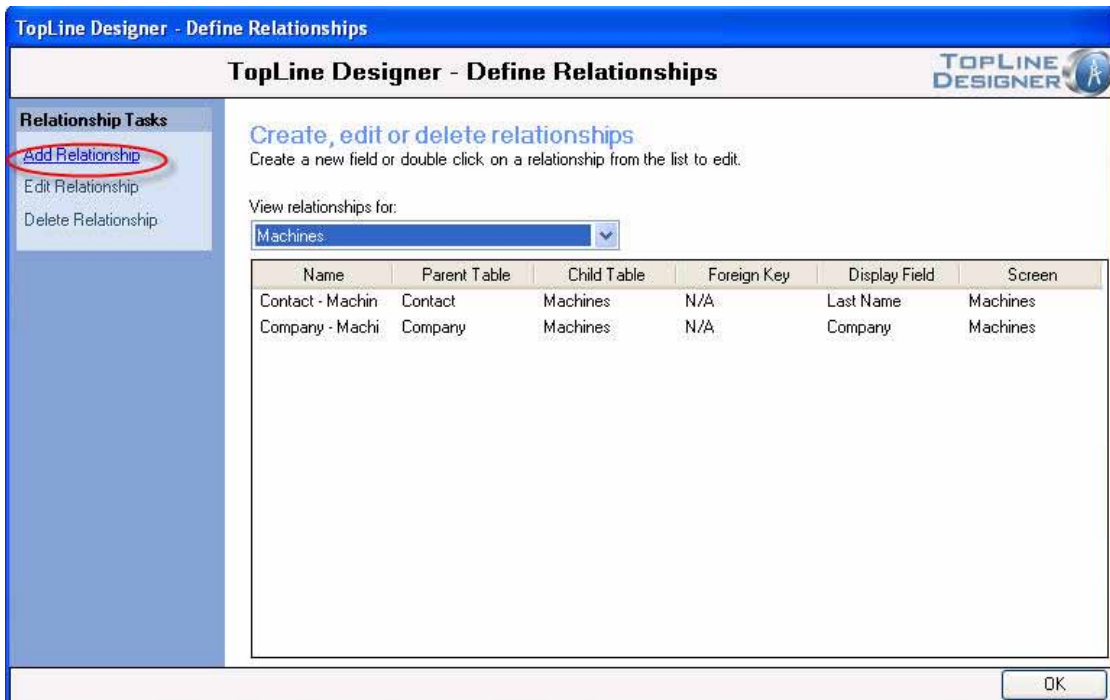
## Edit Relationship

To edit a relationship between existing custom tables is easy.

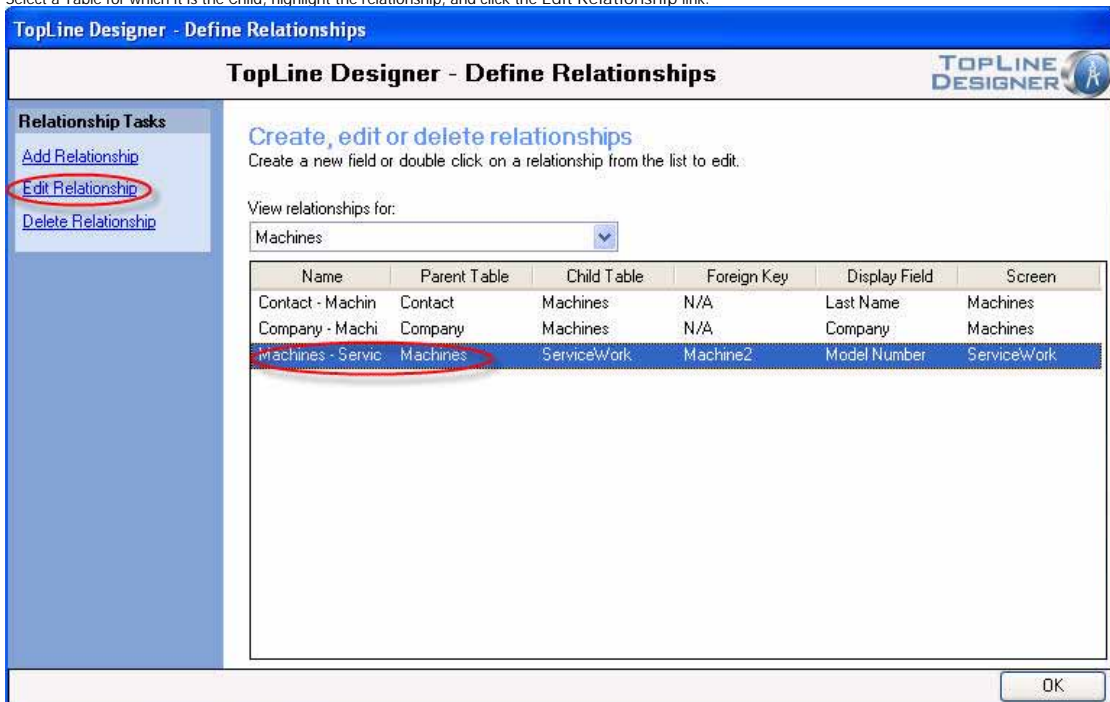
1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...



3. Click on the Define Relationship link.



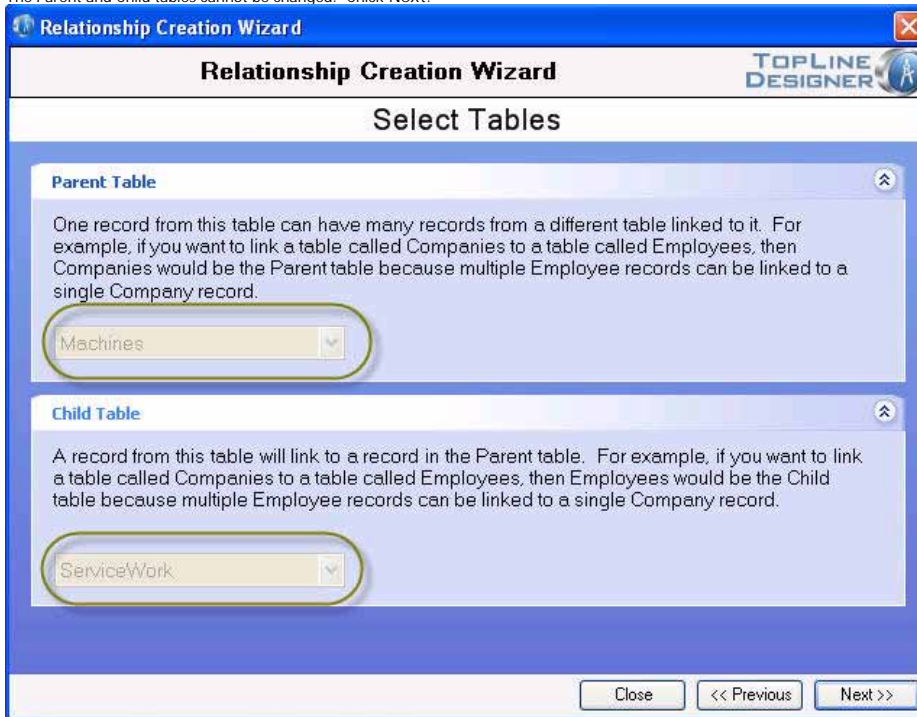
4. Select a Table for which it is the Child, highlight the relationship, and click the Edit Relationship link.



5. The Relationship Creation Wizard will begin. Click Next to start.



6. The Parent and Child tables cannot be changed. Click Next.



7. Modify the existing properties of the relationship as necessary.
8. Click OK to return to the Define Fields screen.

### See also

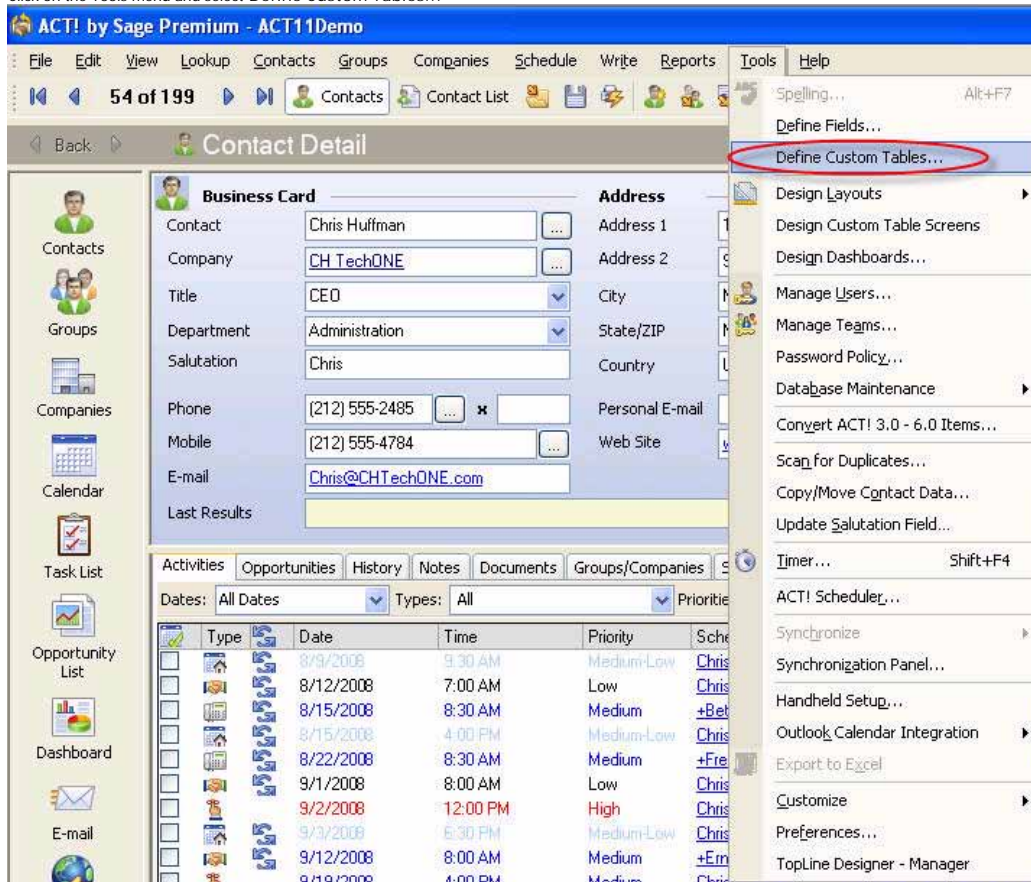
[Add Relationship](#)  
[Delete Relationship](#)  
[Relationship with Activites and Opps](#)

Home > Administrator Functions > Managing Tables > Defining Relationships > Delete Relationship

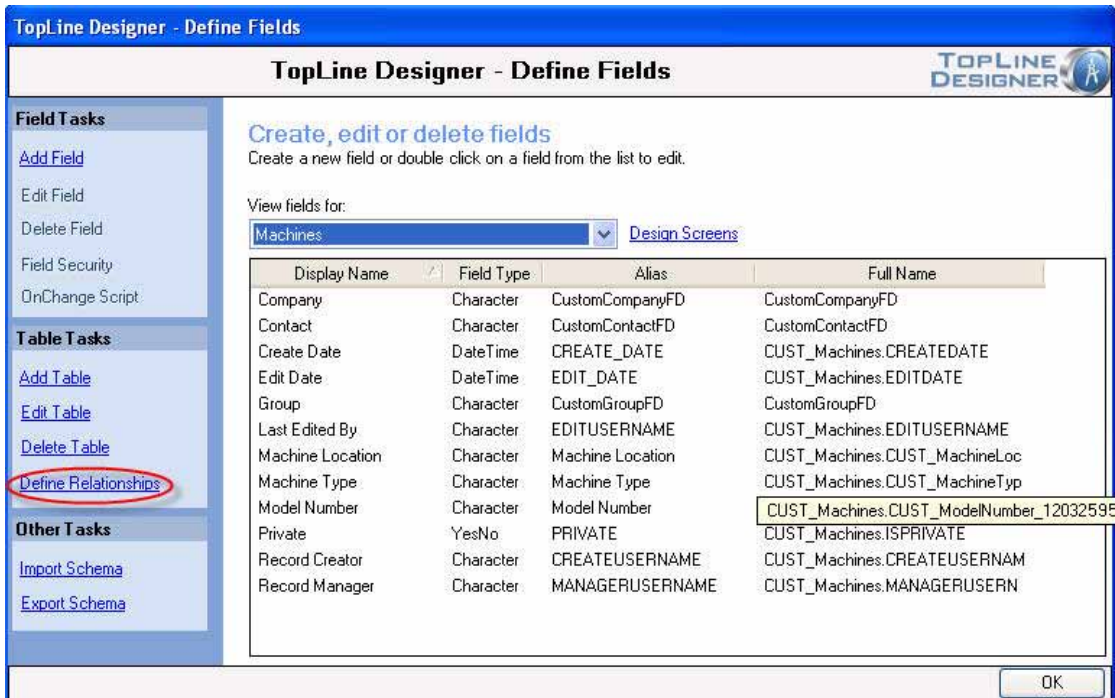
## Delete Relationship

To delete a relationship between existing custom tables is easy.

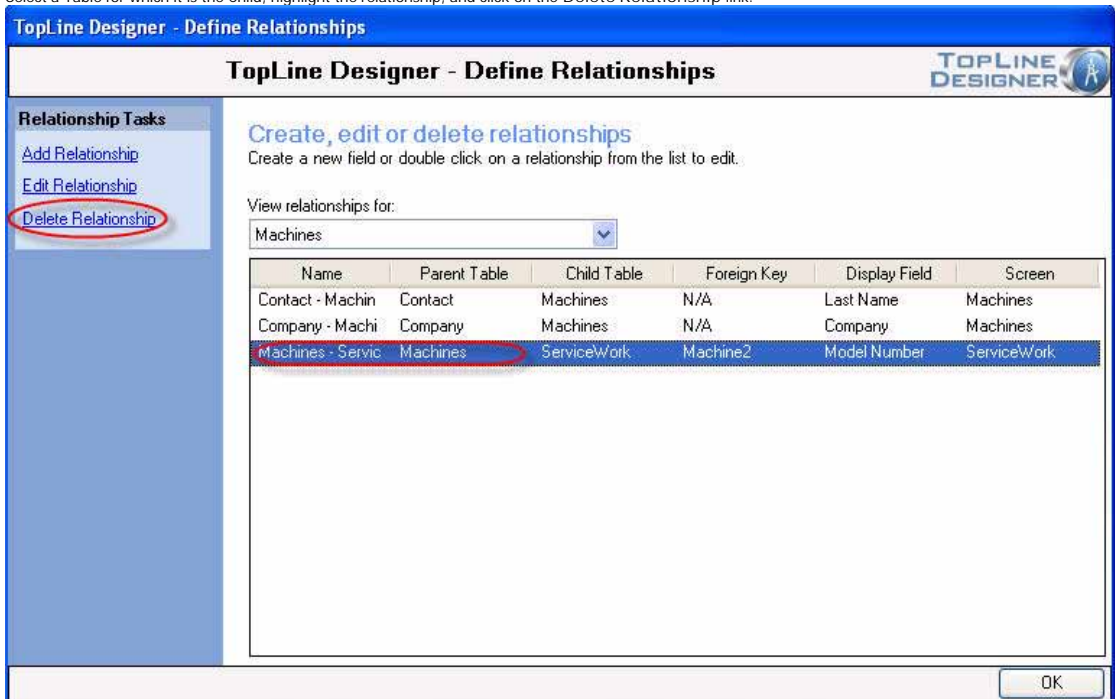
1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...



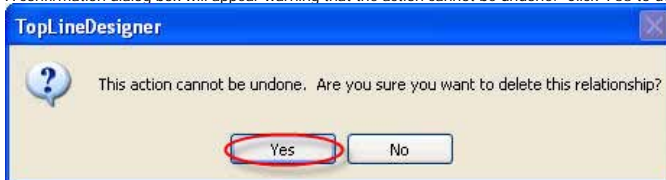
3. Click on the Define Relationship link.



4. Select a Table for which it is the Child, highlight the relationship, and click on the Delete Relationship link.



5. A confirmation dialog box will appear warning that the action cannot be undone. Click Yes to delete the relationship.



6. Click OK to return to the Define Fields screen.

NOTE: No data in either the Parent or Child will be deleted or altered with the deletion of the relationship.

See also

Add Relationship  
Edit Relationship  
Relationship with Activites and Opps

Home > Administrator Functions > Managing Tables > Defining Relationships > Relationship with Activites and Opps

## Relationship with Activites and Opps

Activities and Opportunities can be associated or related to the individual Custom Table records by creating a relationship between the two tables.

Follow the steps under [Add Relationship](#)

Parent Table = Activity (or Opportunity)

Child Table = Custom Table

Foreign Key =

Display Key =

### See also

[Add Relationship](#)

[Edit Relationship](#)

[Delete Relationship](#)

[Home](#) > [Administrator Functions](#) > [Managing Custom Table Screens](#)

## Managing Custom Table Screens

The Administrator can perform the following operations on a master database with TopLine Designer:

- Create a new custom table screen
- Edit the attributes of an existing custom table screen
- Delete an existing custom table screen
- Assign VB.NET scripts (snippets) to perform custom functions

### Articles in this section



[Adding a New Screen](#)



[Changing Screen Properties](#)



[Deleting a Screen](#)



[Designing Screen](#)



[Editing Screen Scripts](#)

### See also

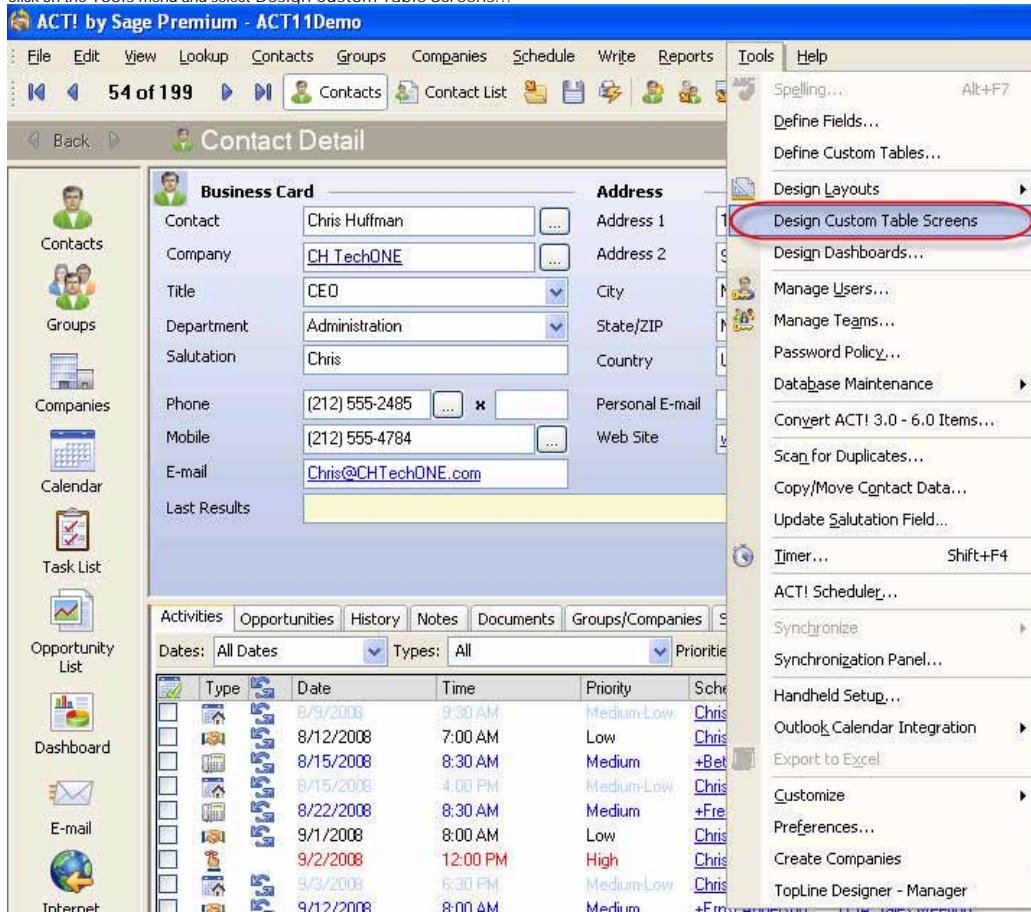
[Applying Preconfigured Template](#)  
[Managing Tables](#)  
[Migrating Data](#)  
[Importing Data](#)  
[Managing Word Templates](#)  
[Managing Schema](#)

Home > Administrator Functions > Managing Custom Table Screens > Adding a New Screen

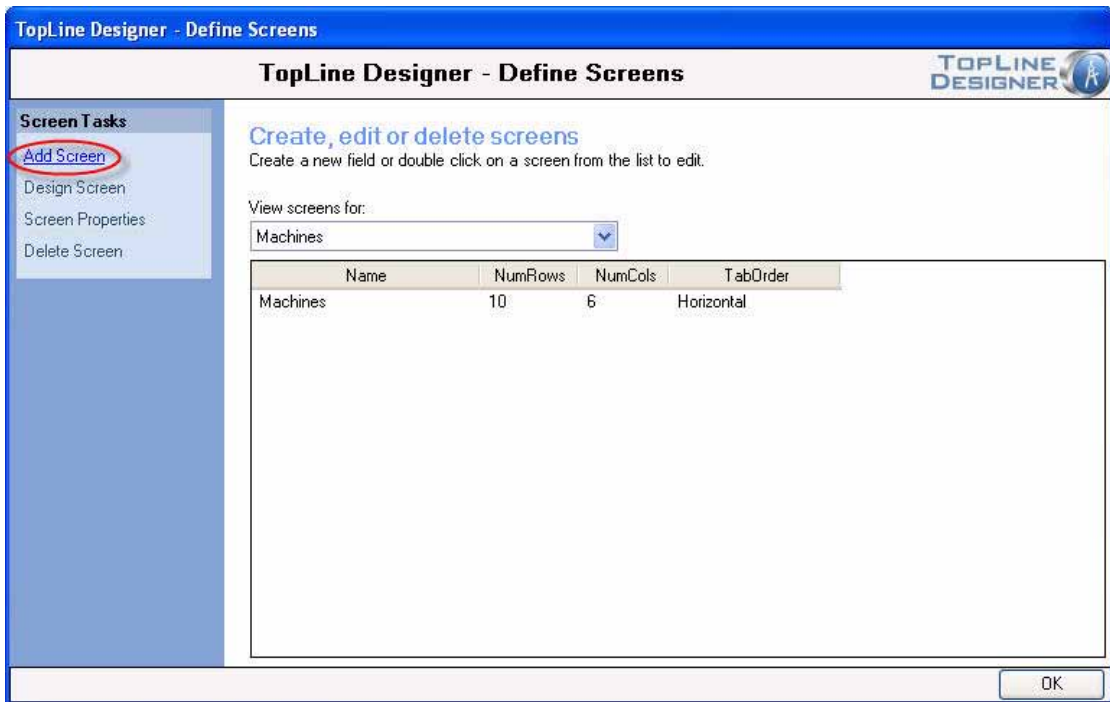
## Adding a New Screen

A blank, default screen will automatically be created upon custom table generation. However, creating a new custom table screen is easy.

1. Open ACT!
2. Click on the Tools menu and select Design Custom Table Screens...



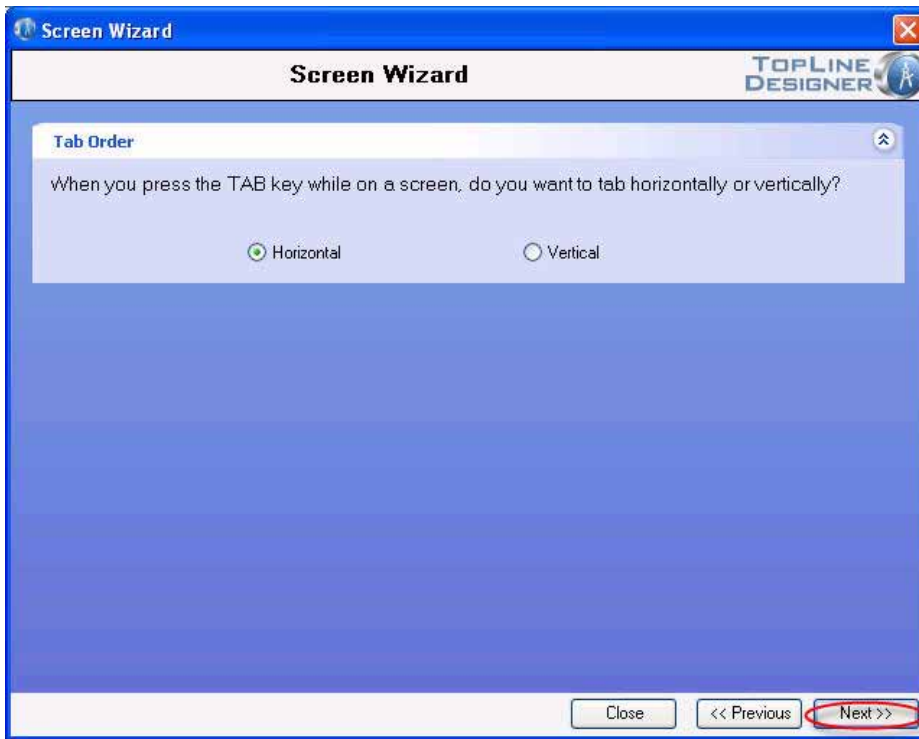
3. Select the custom table and click on the Add Screen link.



4. Type the name of the new screen, set the maximum number of rows and columns, and click Next.



5. Select either Horizontal or Vertical tab order, then click Next



6. Click Finish to create the new blank screen and return to the Define Screens window.



See also

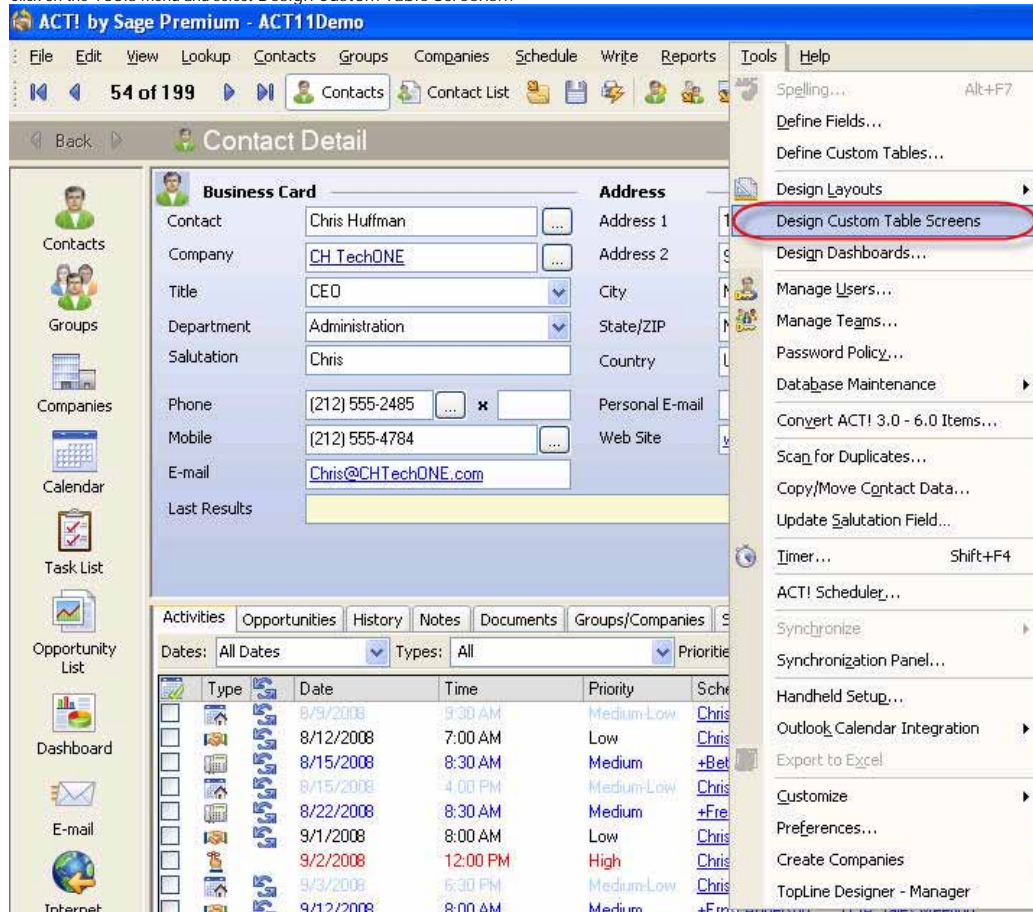
- [Changing Screen Properties](#)
- [Deleting a Screen](#)
- [Designing Screen](#)
- [Editing Screen Scripts](#)

Home > Administrator Functions > Managing Custom Table Screens > Changing Screen Properties

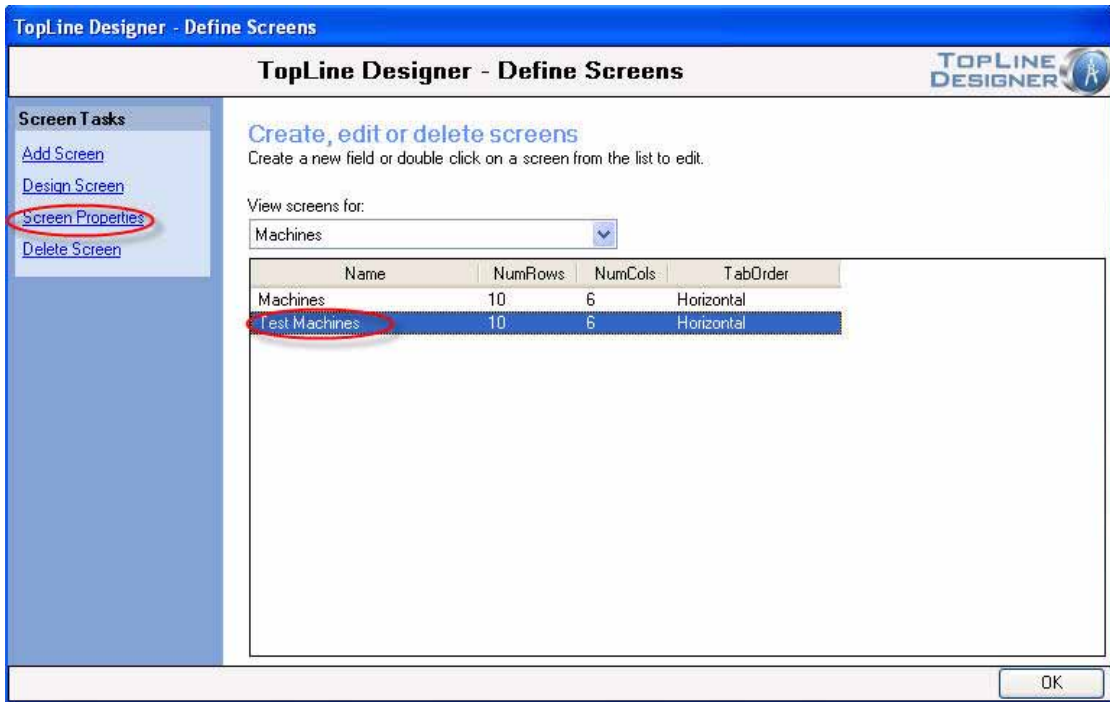
## Changing Screen Properties

A blank, default screen will automatically be created upon custom table generation, but creating a new custom table screen is easy.

1. Open ACT!
2. Click on the Tools menu and select Design Custom Table Screens...



3. Select the custom table and click the Screen Properties link.



4. Change the name of the new screen, set the maximum number of rows and columns, and click Next.



5. Select either Horizontal or Vertical tab order, click Next.



6. Click Finish to commit the changes and return to the Define Screens window.



### See also

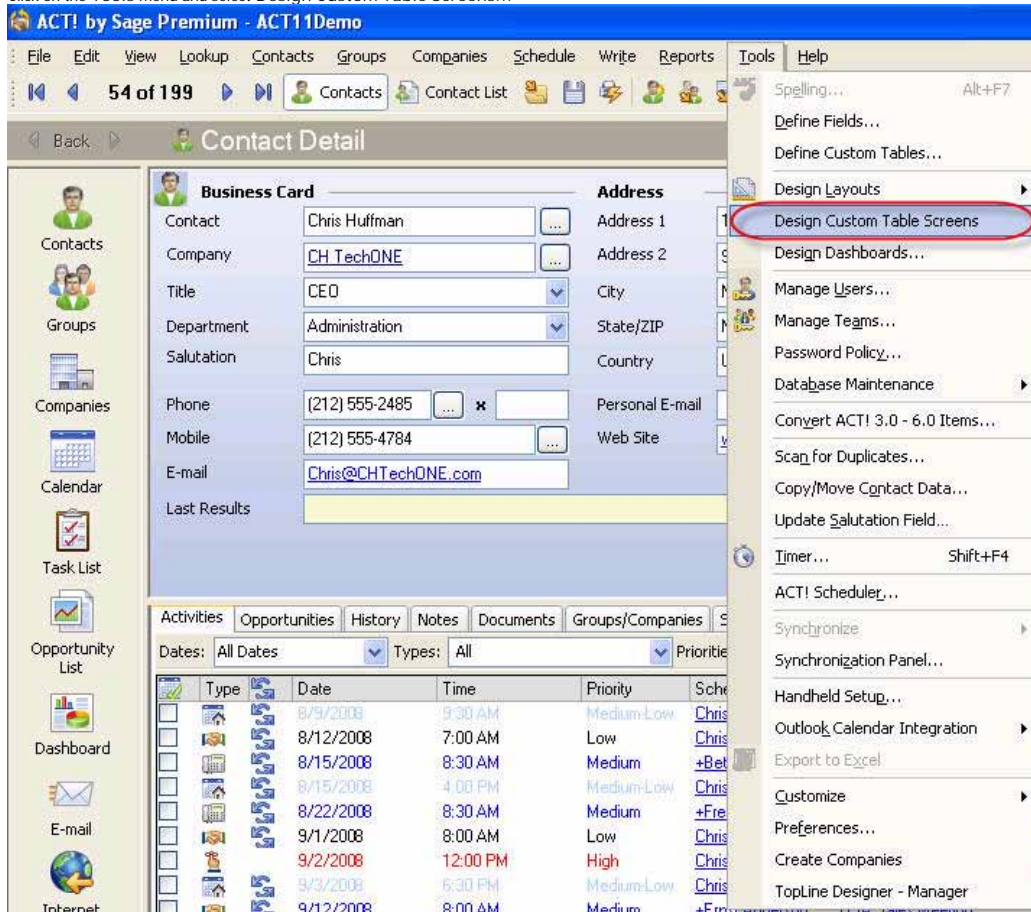
[Adding a New Screen](#)  
[Deleting a Screen](#)  
[Designing Screen](#)  
[Editing Screen Scripts](#)

Home > Administrator Functions > Managing Custom Table Screens > Deleting a Screen

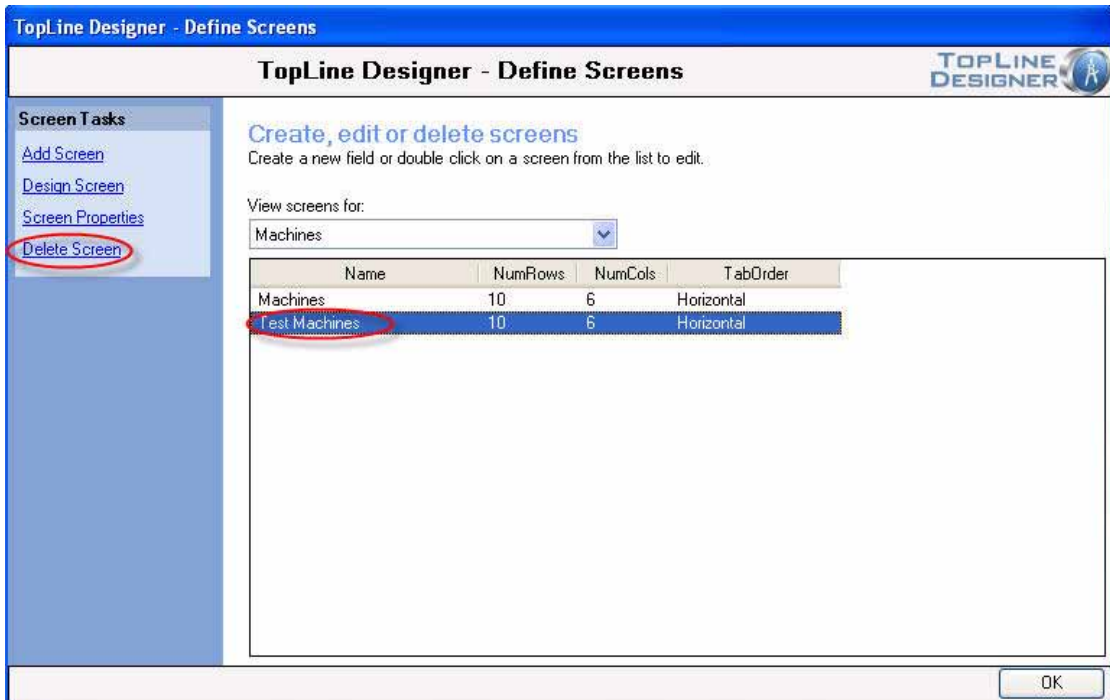
## Deleting a Screen

A custom table screen can be deleted at any time, but just ensure that no relationship is using the custom table screen.

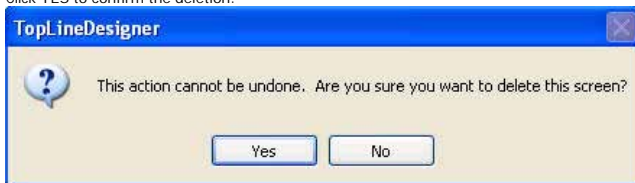
1. Open ACT!
2. Click on the Tools menu and select Design Custom Table Screens...



3. Select the custom table and screen, click the Delete Screen link.



4. Click YES to confirm the deletion.



5. Return to the Define Screens window.

## See also

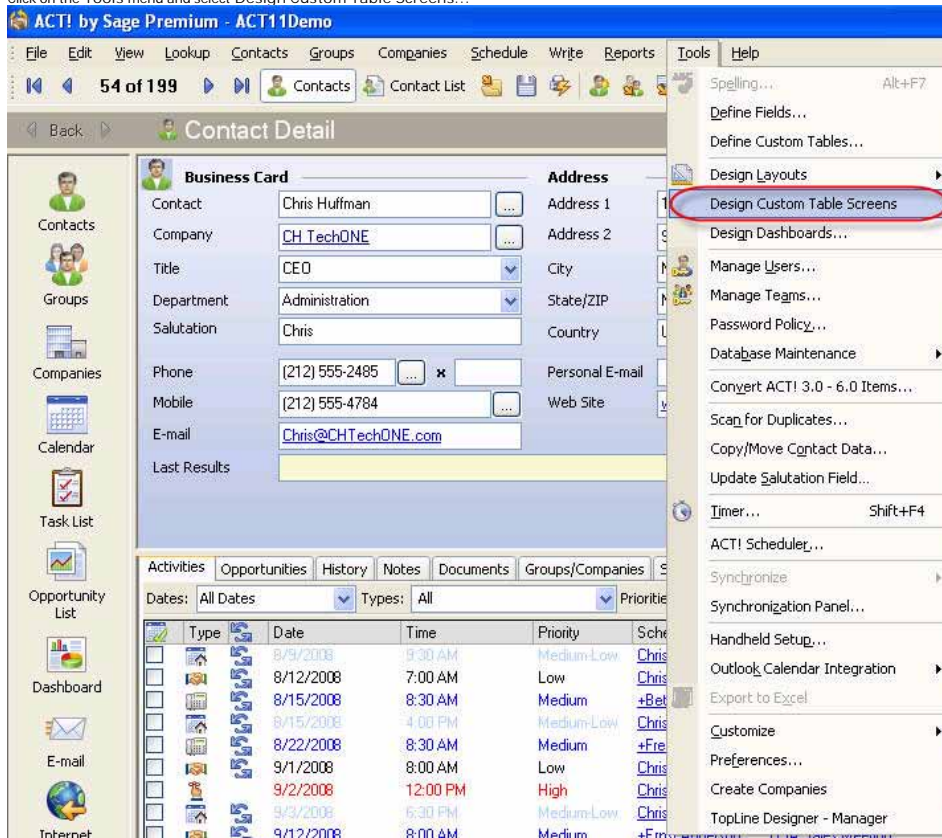
[Adding a New Screen](#)  
[Changing Screen Properties](#)  
[Designing Screen](#)  
[Editing Screen Scripts](#)

Home > Administrator Functions > Managing Custom Table Screens > Designing Screen

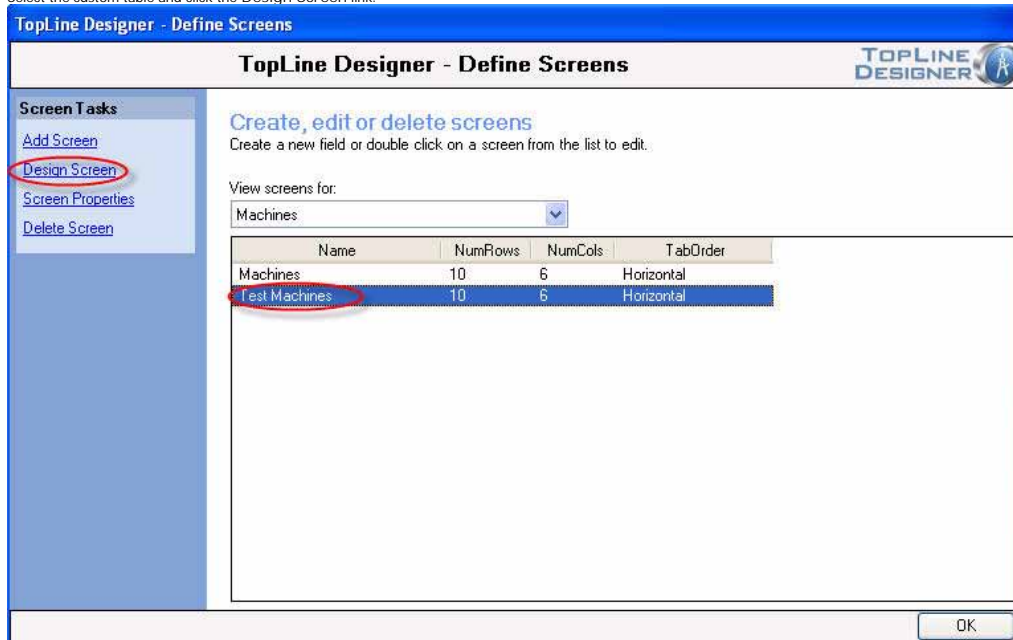
## Designing Screen

Place fields on the blank screen by:

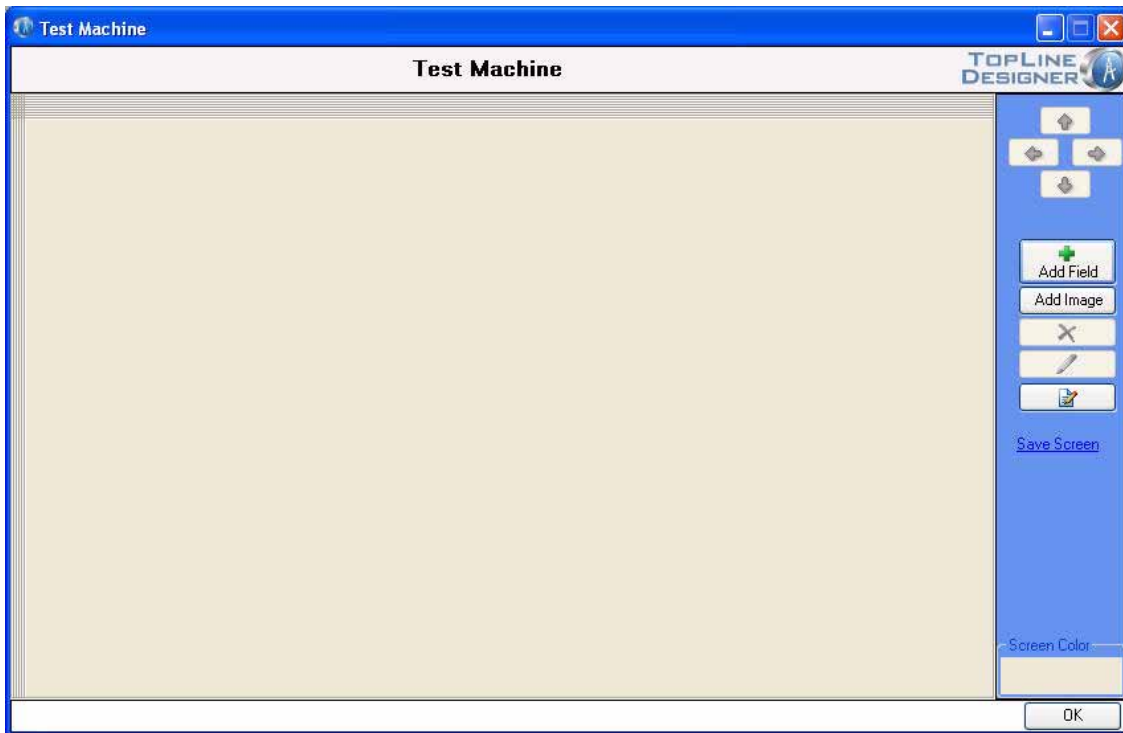
1. Open ACT!
2. Click on the Tools menu and select Design Custom Table Screens...



3. Select the custom table and click the Design Screen link.



4. The Custom Entity Screen will appear.



5. The Custom Table Screen is now ready to add fields, images and scripts.

#### Articles in this section



[Adding Fields](#)



[Moving Fields](#)



[Adding Static Images](#)



[Deleting Fields](#)



[Modifying Field Attributes](#)



[Changing Screen Color](#)

#### See also

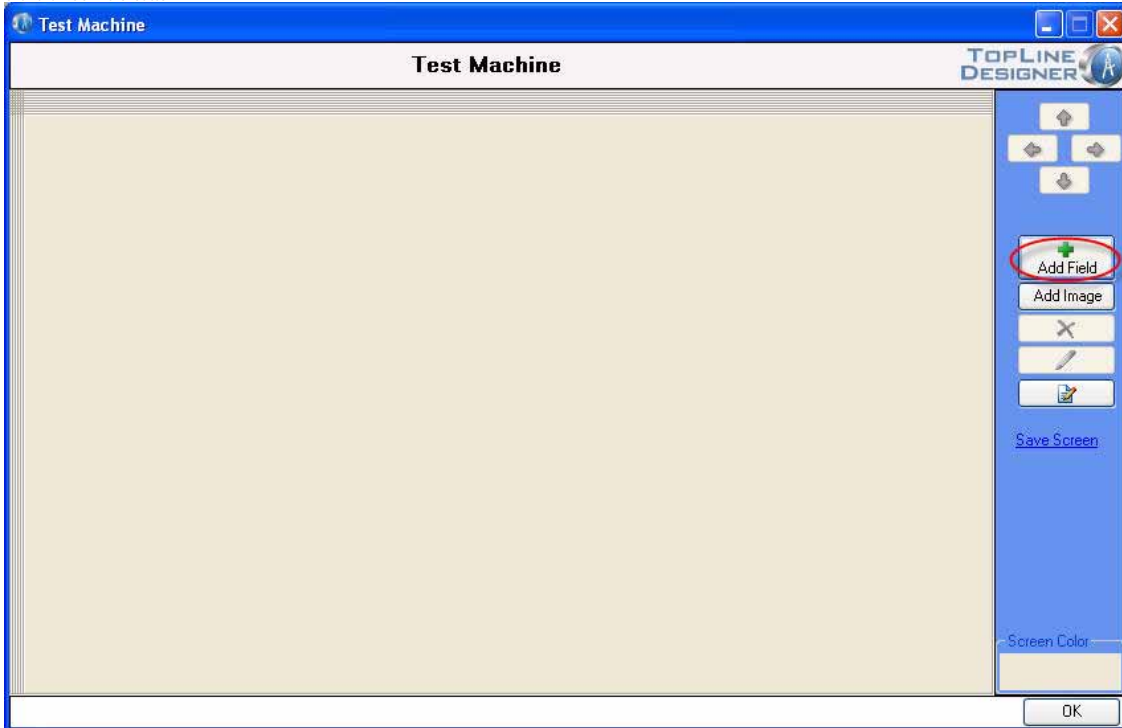
[Adding a New Screen](#)  
[Changing Screen Properties](#)  
[Deleting a Screen](#)  
[Editing Screen Scripts](#)

Home > Administrator Functions > Managing Custom Table Screens > Designing Screen > Adding Fields

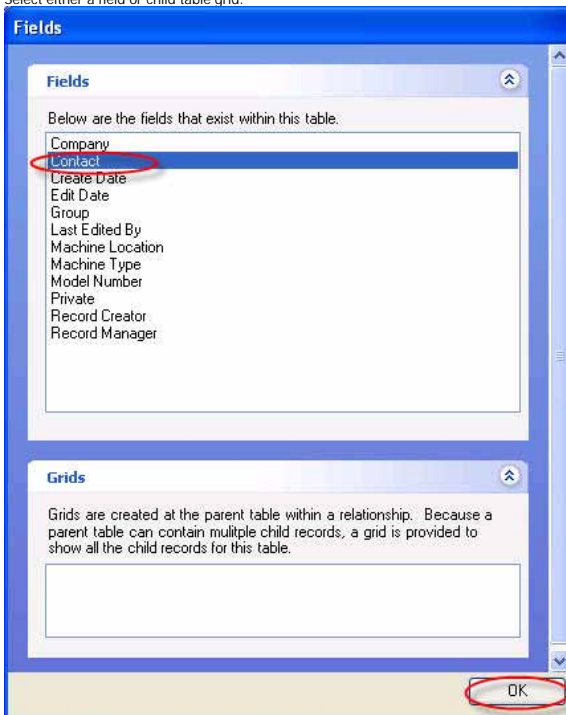
## Adding Fields

Fields from the custom table or a grid containing all the immediate child records may be displayed on the custom table screen.

1. Click the Add Field button.



2. Select either a field or child table grid.



3. The field will appear in the next available section of the screen.

See also

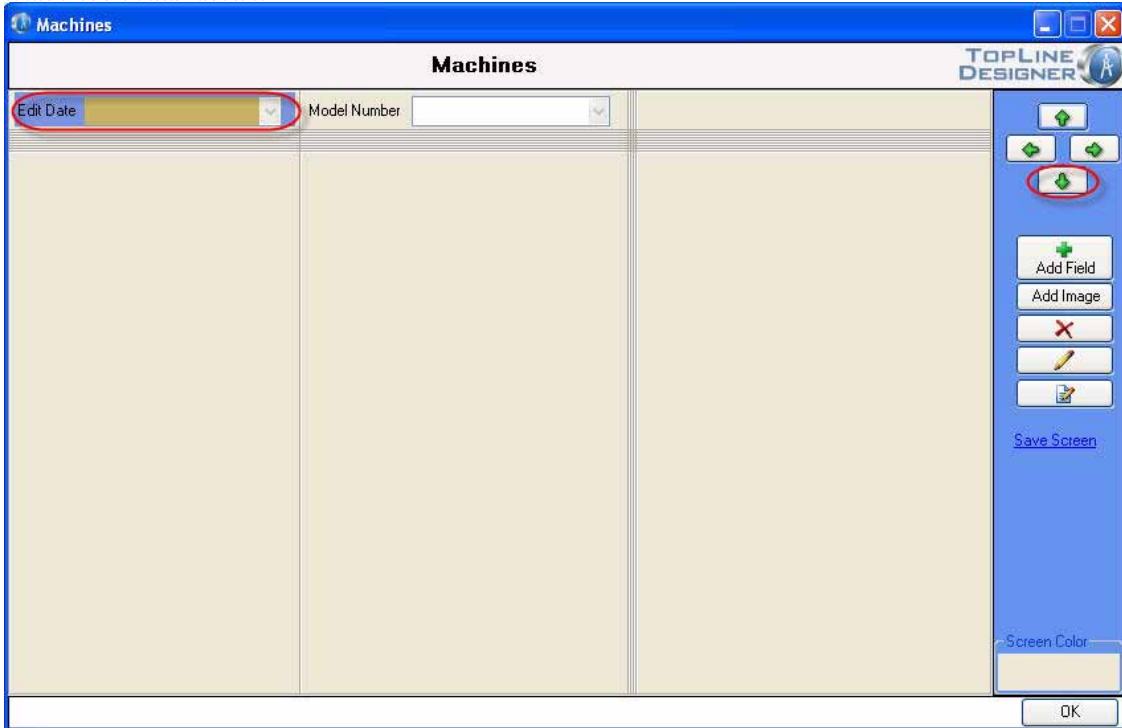
Moving Fields  
Adding Static Images  
Deleting Fields  
Modifying Field Attributes  
Changing Screen Color

Home > Administrator Functions > Managing Custom Table Screens > Designing Screen > Moving Fields

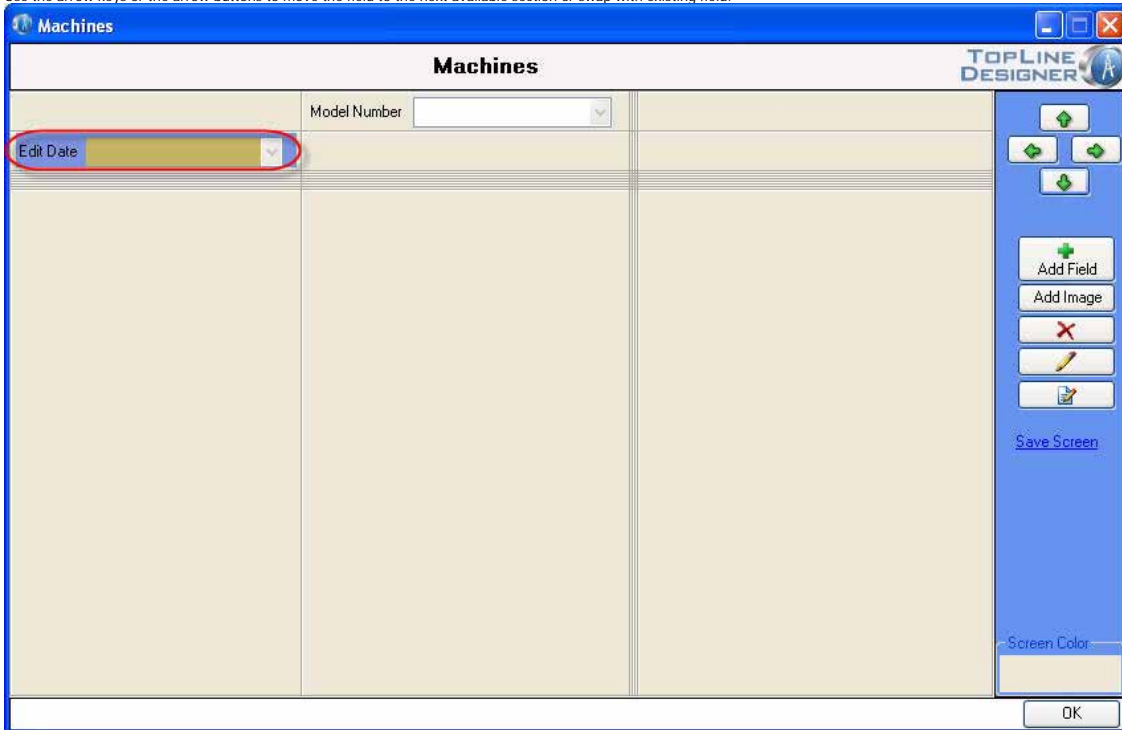
## Moving Fields

Fields may be moved to any section of the custom table screen grid using the arrow keys or the arrow buttons in the upper right hand corner of the TopLine Designer window.

1. Select the field on the custom table screen.



2. Use the arrow keys or the arrow buttons to move the field to the next available section or swap with existing field.



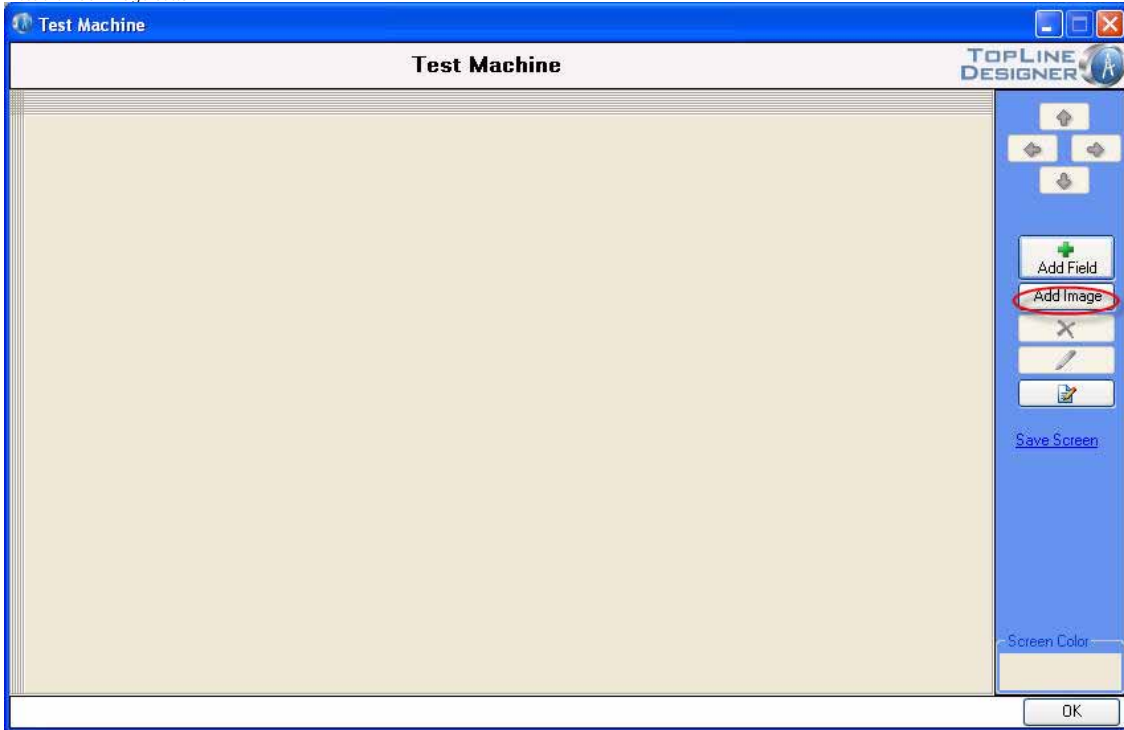
See also

Adding Fields  
Adding Static Images  
Deleting Fields  
Modifying Field Attributes  
Changing Screen Color

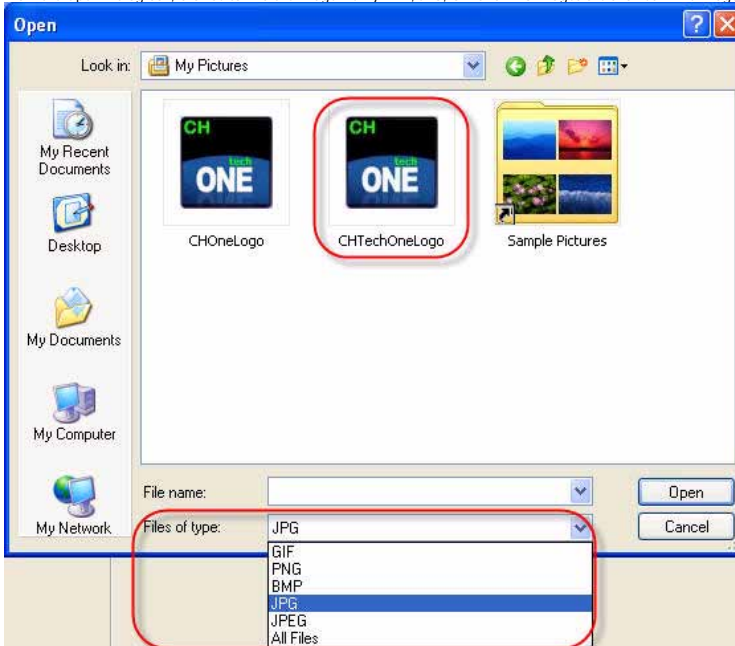
## Adding Static Images

Static images, such as corporate logos, can be added to the custom table screen.

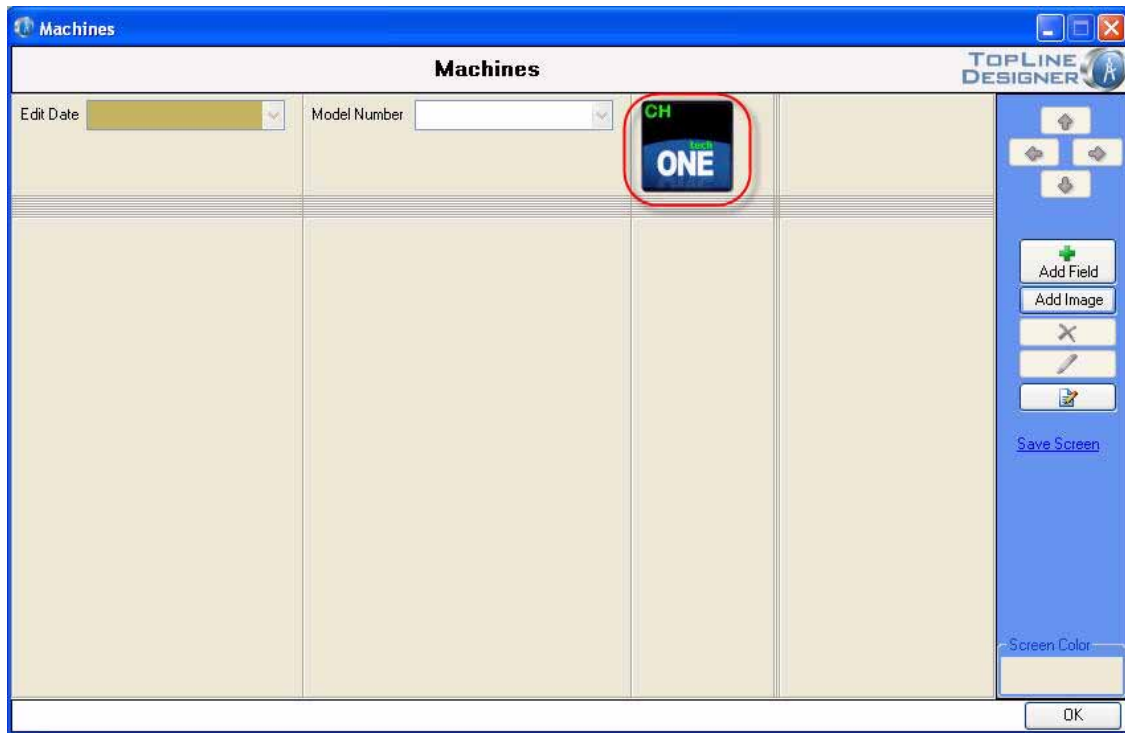
1. Press the Add Image button.



2. From the Open Dialog box, browse to find the image. Only BMP, JPG, GIF and PNG images are allowed. The image cannot be resized once it has been added to the screen.



3. The image will be placed in the first available section.



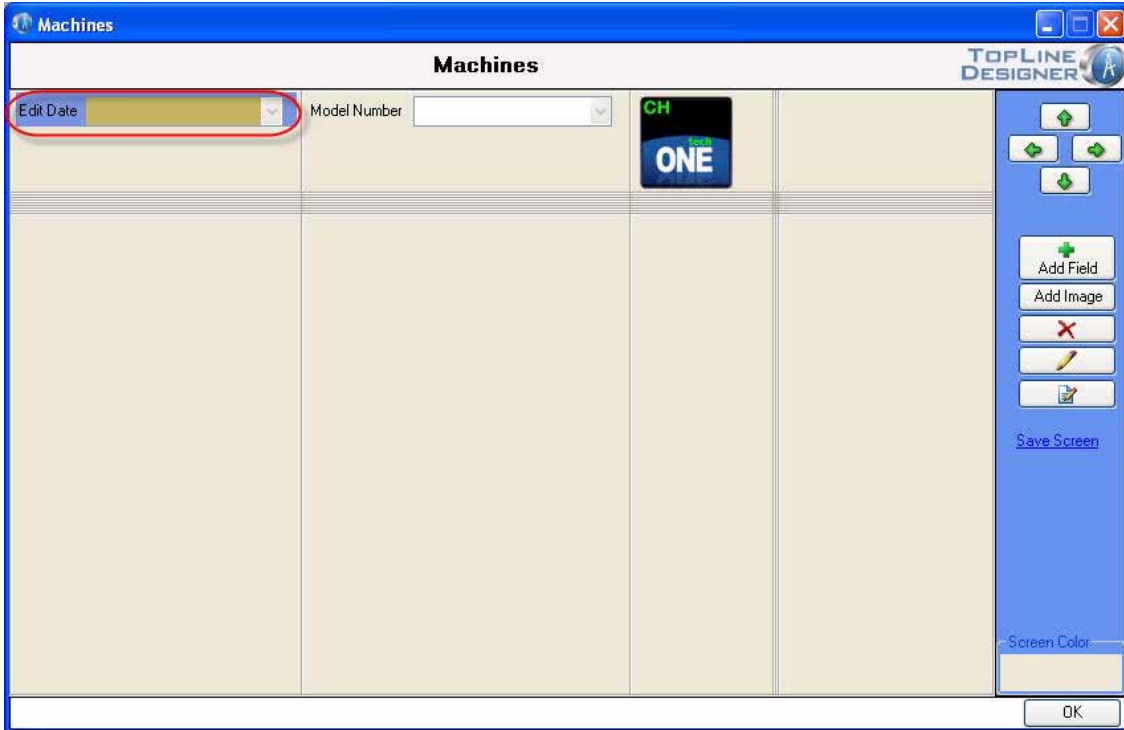
#### See also

- [Adding Fields](#)
- [Moving Fields](#)
- [Deleting Fields](#)
- [Modifying Field Attributes](#)
- [Changing Screen Color](#)

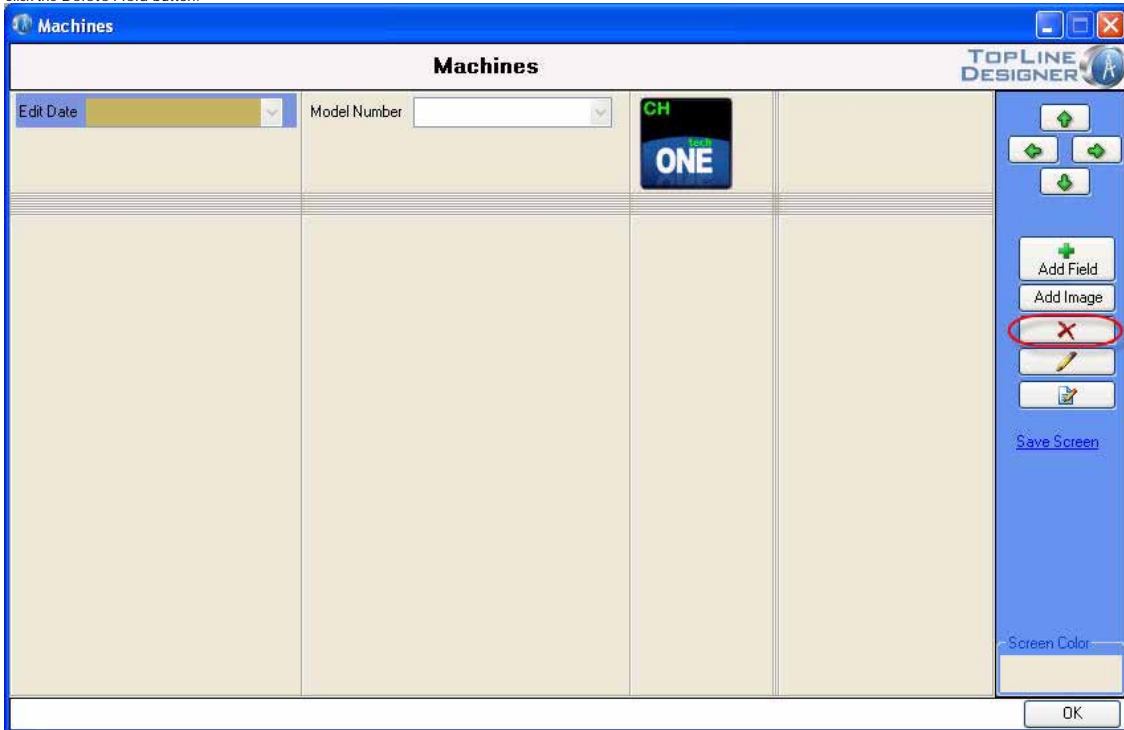
## Deleting Fields

Fields can be removed from the custom table screen.

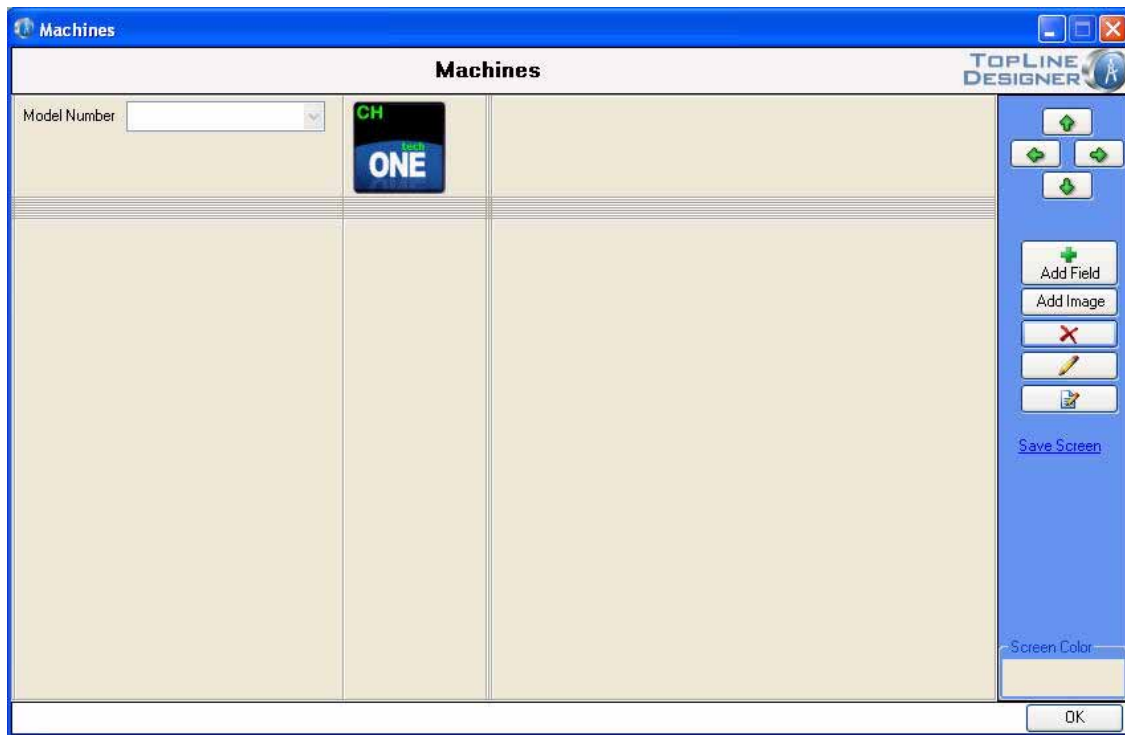
1. Select the field on the custom table screen.



2. Click the Delete Field button.



3. The field is removed.



#### See also

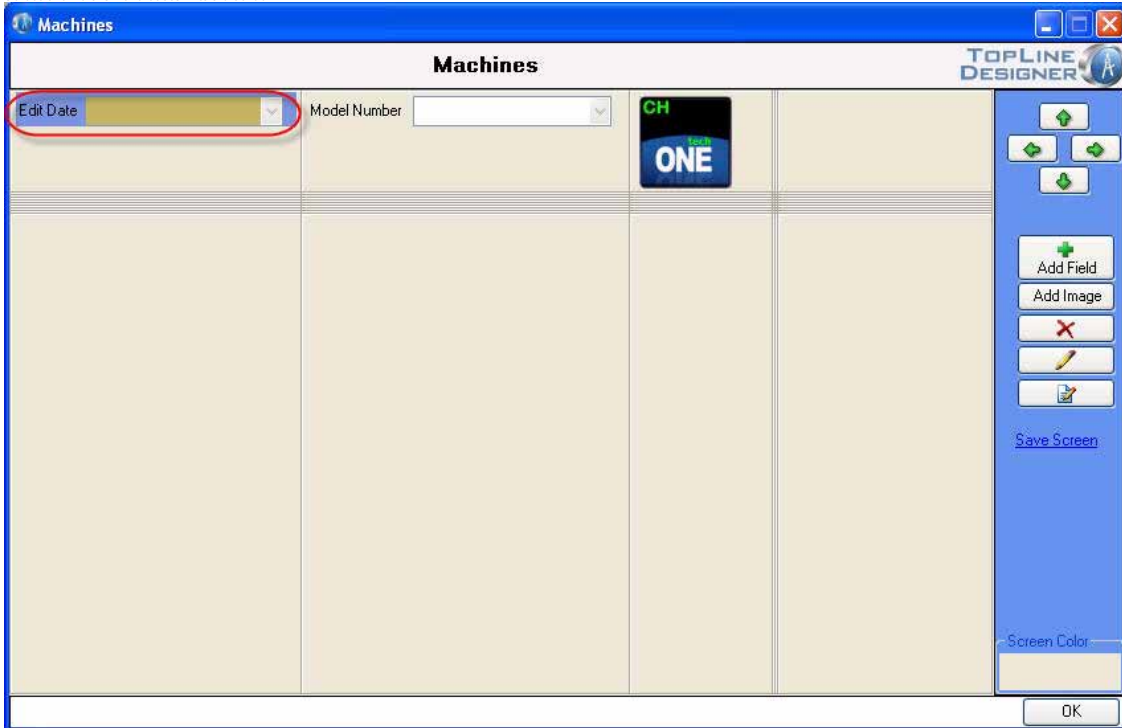
- [Adding Fields](#)
- [Moving Fields](#)
- [Adding Static Images](#)
- [Modifying Field Attributes](#)
- [Changing Screen Color](#)

Home > Administrator Functions > Managing Custom Table Screens > Designing Screen > Modifying Field Attributes

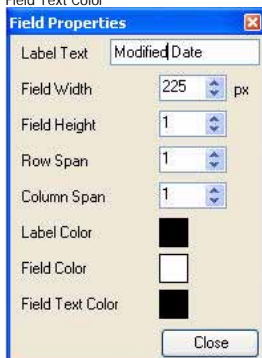
## Modifying Field Attributes

Field attributes define how the field is displayed on the screen.

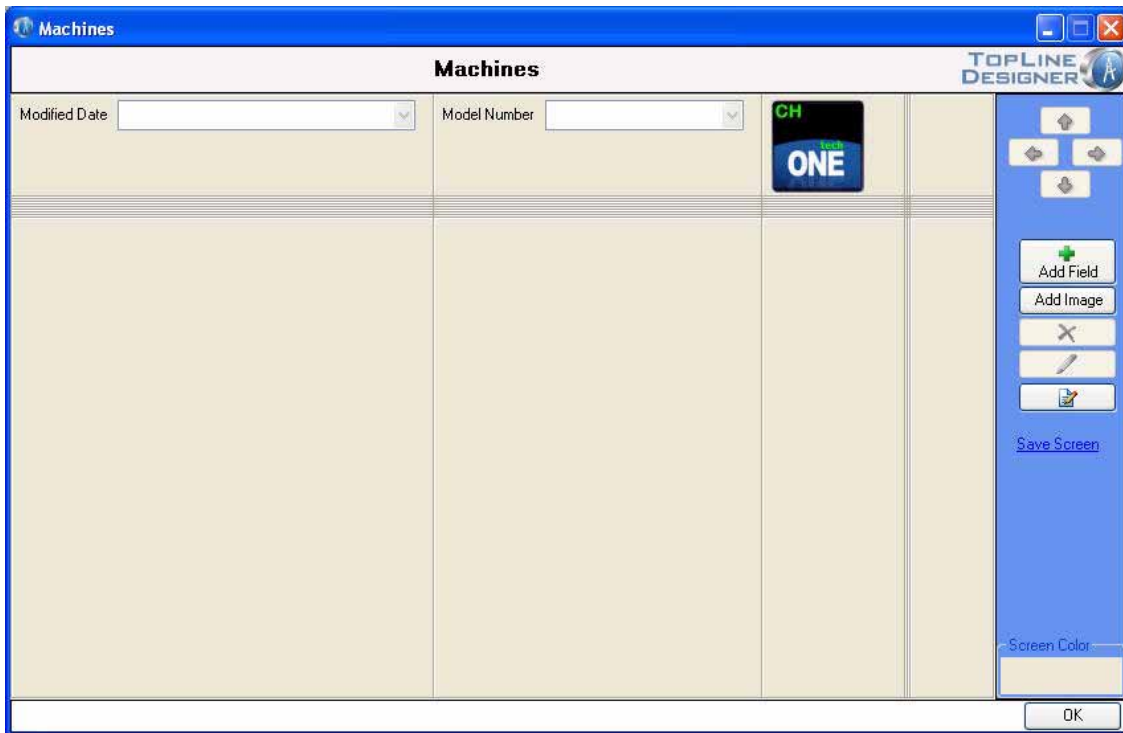
1. Select the field on the custom table screen.



2. Click the Edit Field Properties button.
3. Modify the Field Properties as needed.
  1. Label Text (always appears left of the field)
  2. Field Width (in pixels)
  3. Field Height (only valid for Memo Fields and Grids)
  4. Row Span
  5. Column Span
  6. Label Color
  7. Field Color
  8. Field Text Color



4. Click Close to apply the changes.



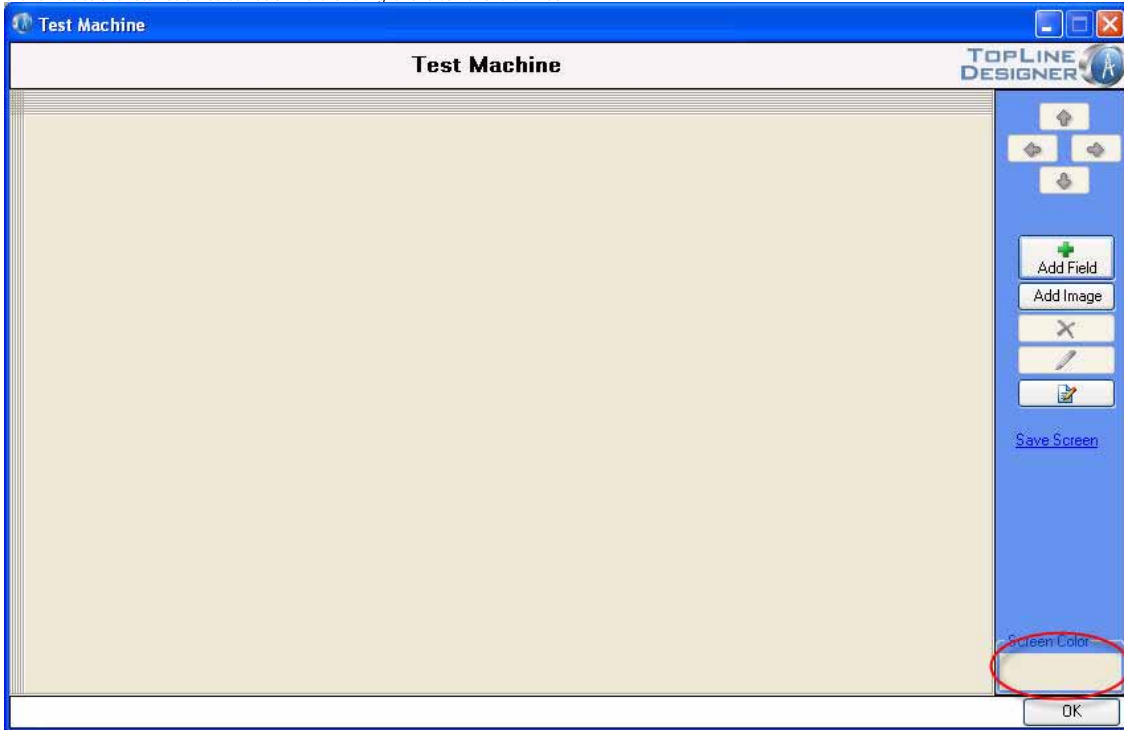
#### See also

- [Adding Fields](#)
- [Moving Fields](#)
- [Adding Static Images](#)
- [Deleting Fields](#)
- [Changing Screen Color](#)

## Changing Screen Color

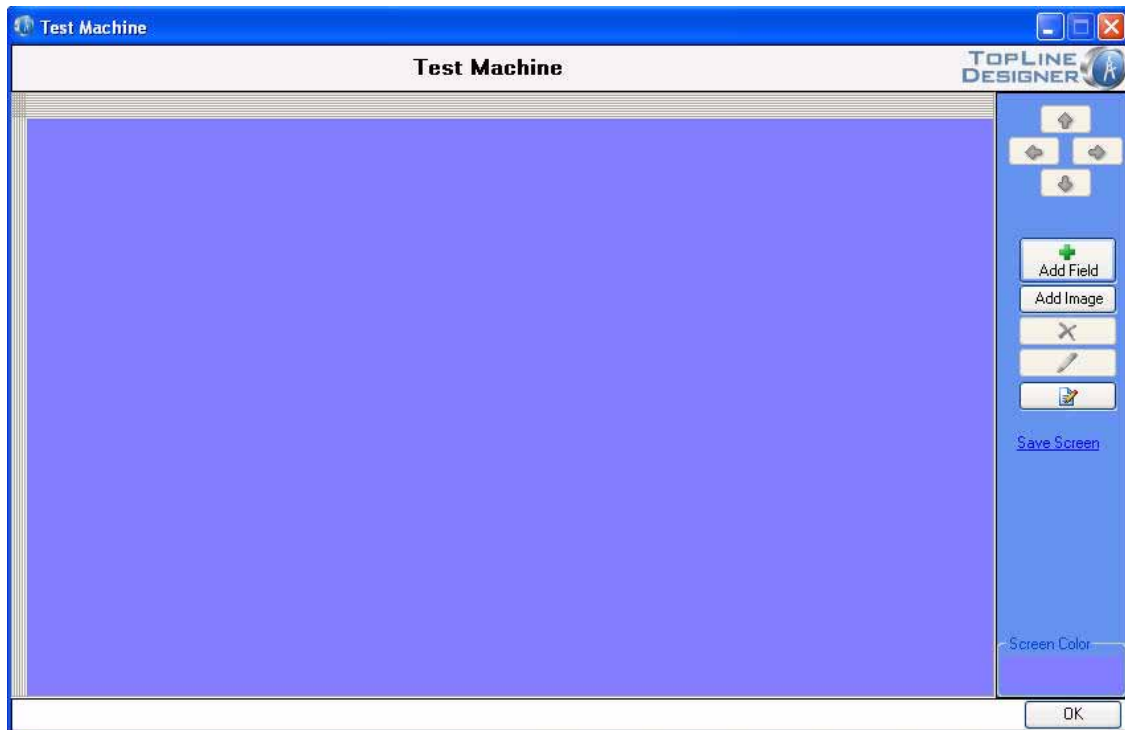
The background color of the Custom Table Screen can be changed, but gradients and tiled graphic files cannot be used.

1. Click on the color swatch below Screen Color in the lower right hand corner of the window.



2. Choose either a Basic Color or Define a Custom Color.
3. Click OK to apply the color to the screen.





NOTE: Custom Colors are not remembered for future use.

#### See also

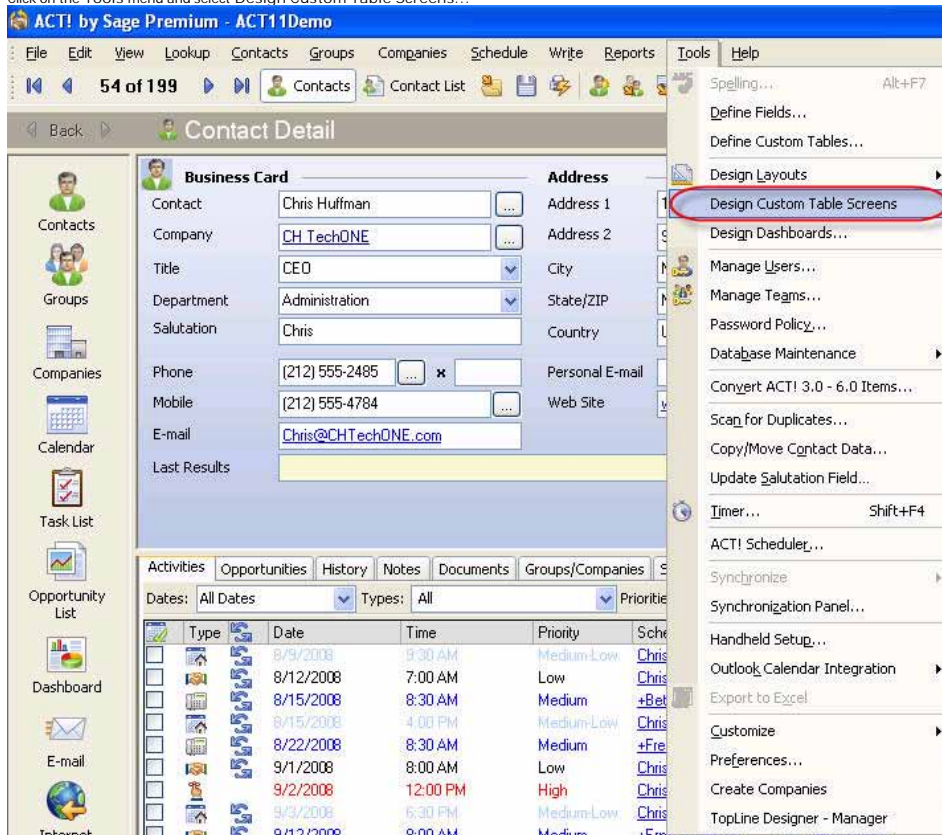
[Adding Fields](#)  
[Moving Fields](#)  
[Adding Static Images](#)  
[Deleting Fields](#)  
[Modifying Field Attributes](#)

Home > Administrator Functions > Managing Custom Table Screens > Editing Screen Scripts

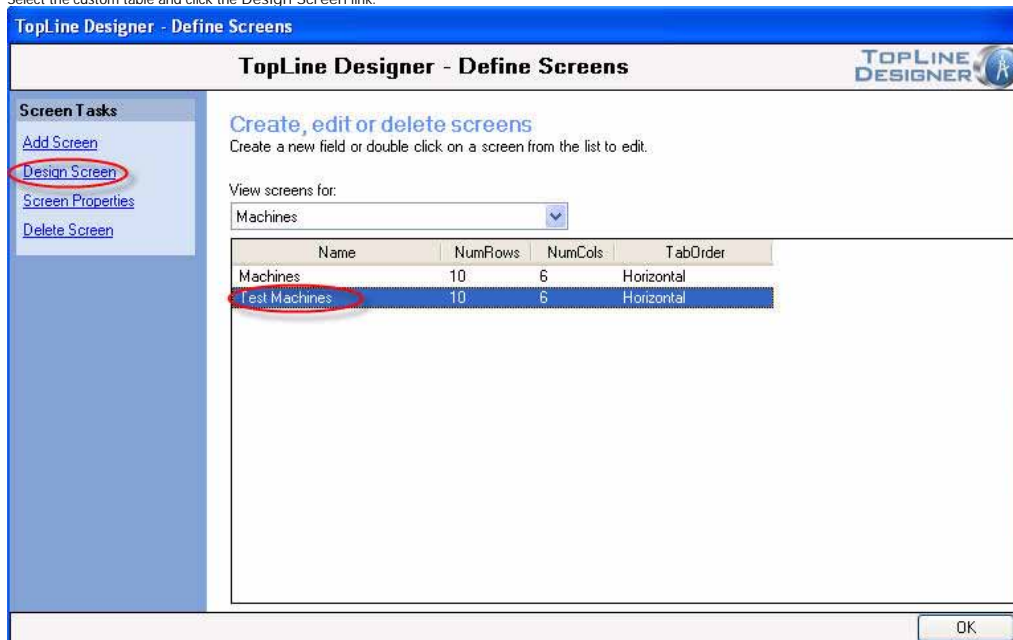
## Editing Screen Scripts

TopLine Designer (along with ACT) can use Visual Basic Scripting to help manipulate ACT! data and automate tasks.

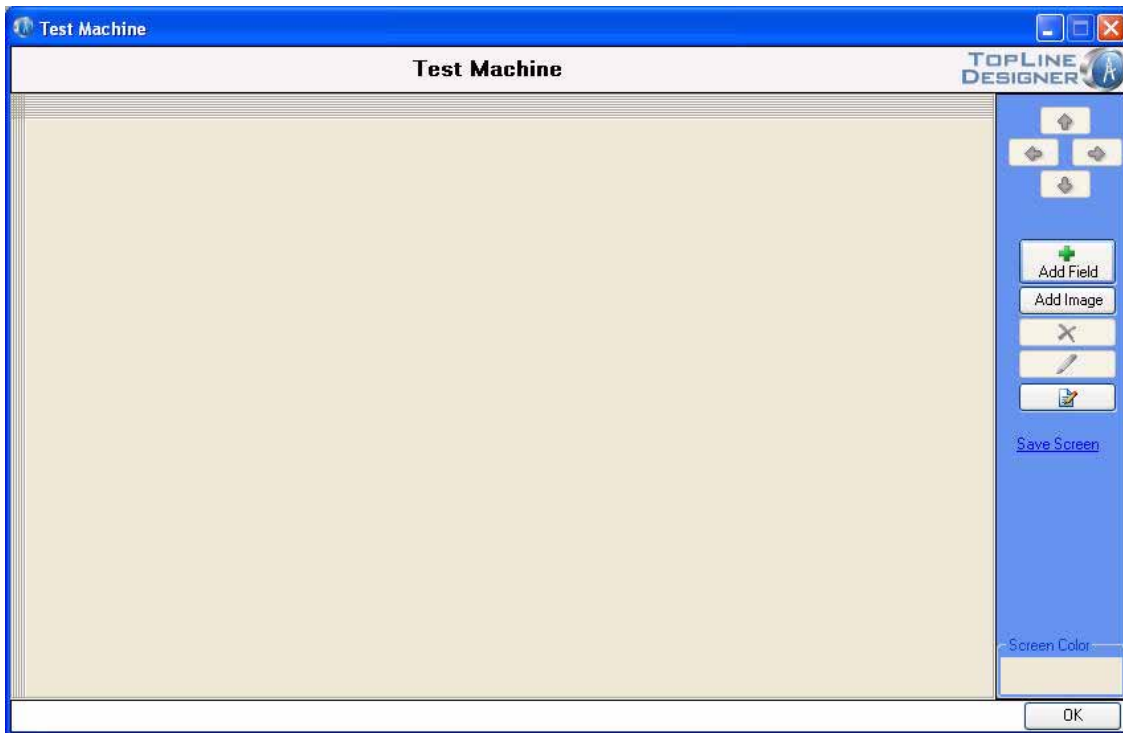
1. Open ACT!
2. Click on the Tools menu and select Design Custom Table Screens...



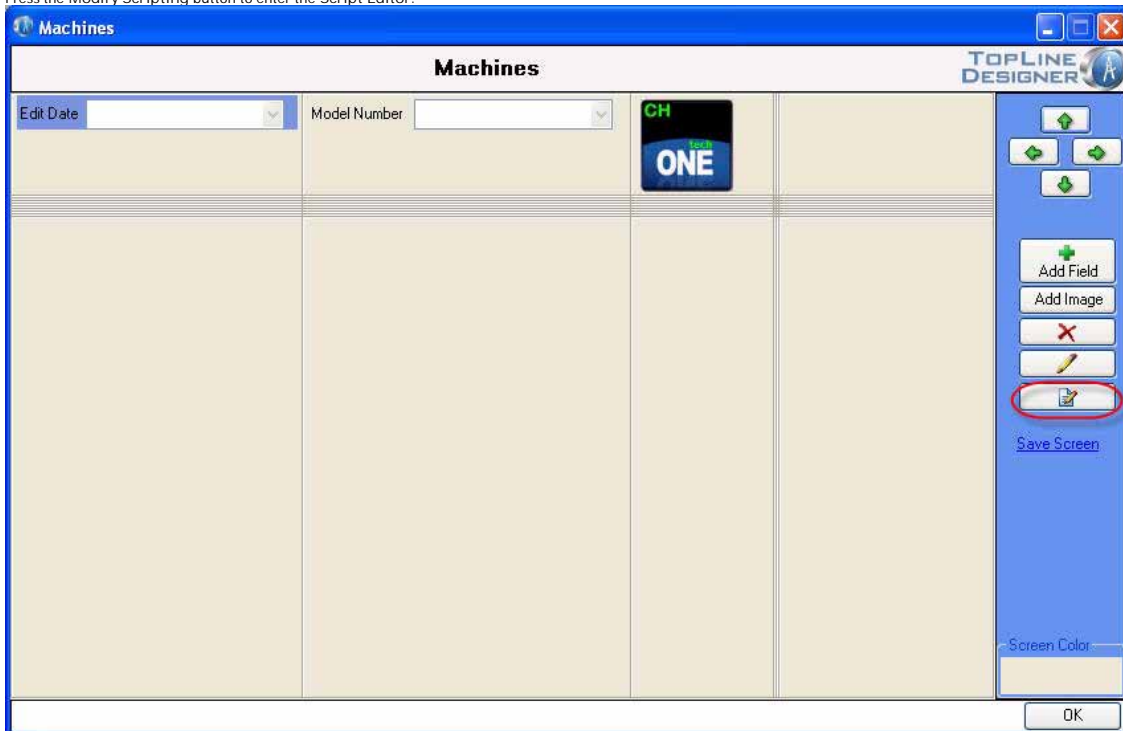
3. Select the custom table and click the Design Screen link.



4. The Custom Entity Screen will appear.



5. Press the Modify Scripting button to enter the Script Editor.



#### Articles in this section



See also

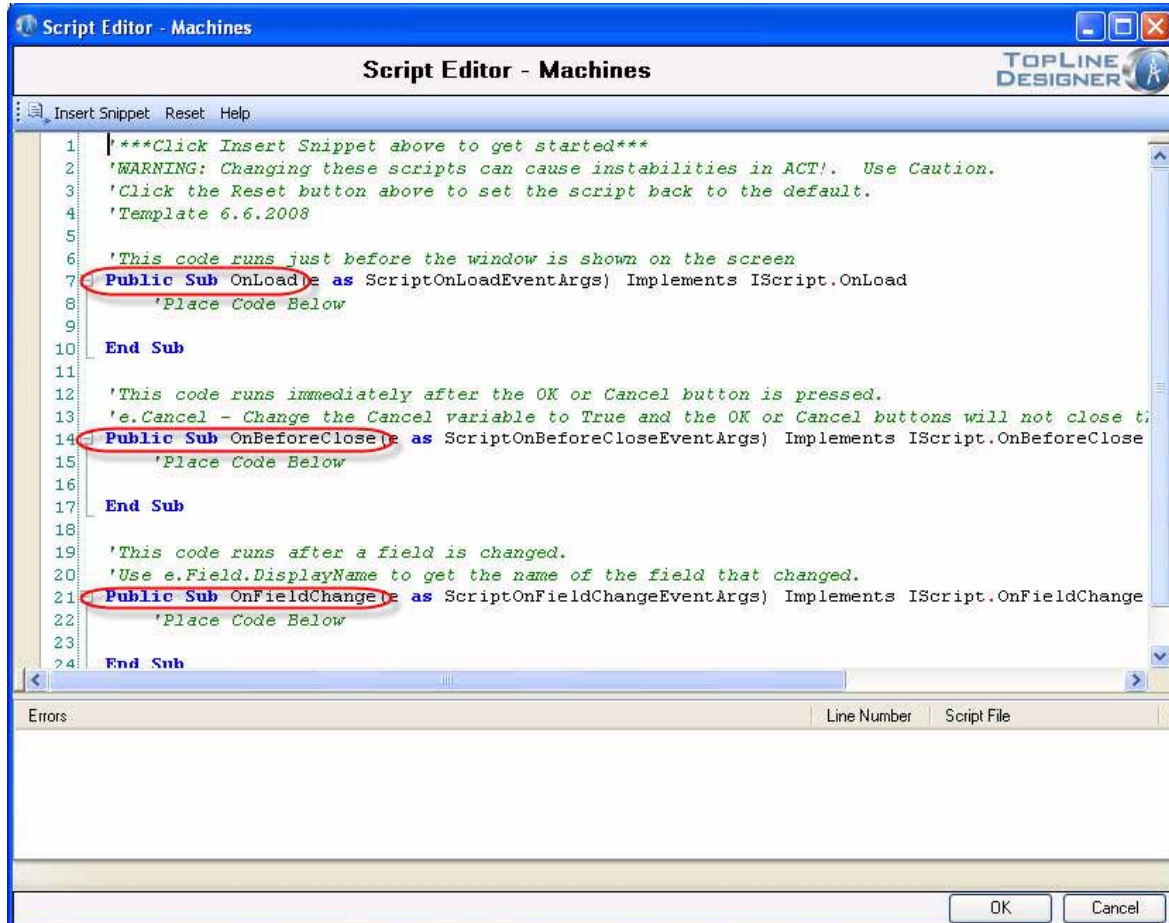
[Adding a New Screen](#)  
[Changing Screen Properties](#)  
[Deleting a Screen](#)  
[Designing Screen](#)

Home > Administrator Functions > Managing Custom Table Screens > Editing Screen Scripts > Scripting Events

## Scripting Events

There are 3 events in a TopLine Designer Custom Table Screen that can be used to launch a script.

1. OnLoad = When the screen is first displayed.
2. OnBeforeClose = When the screen is closed.
3. OnFieldChange = When a field's value is changed.



See also

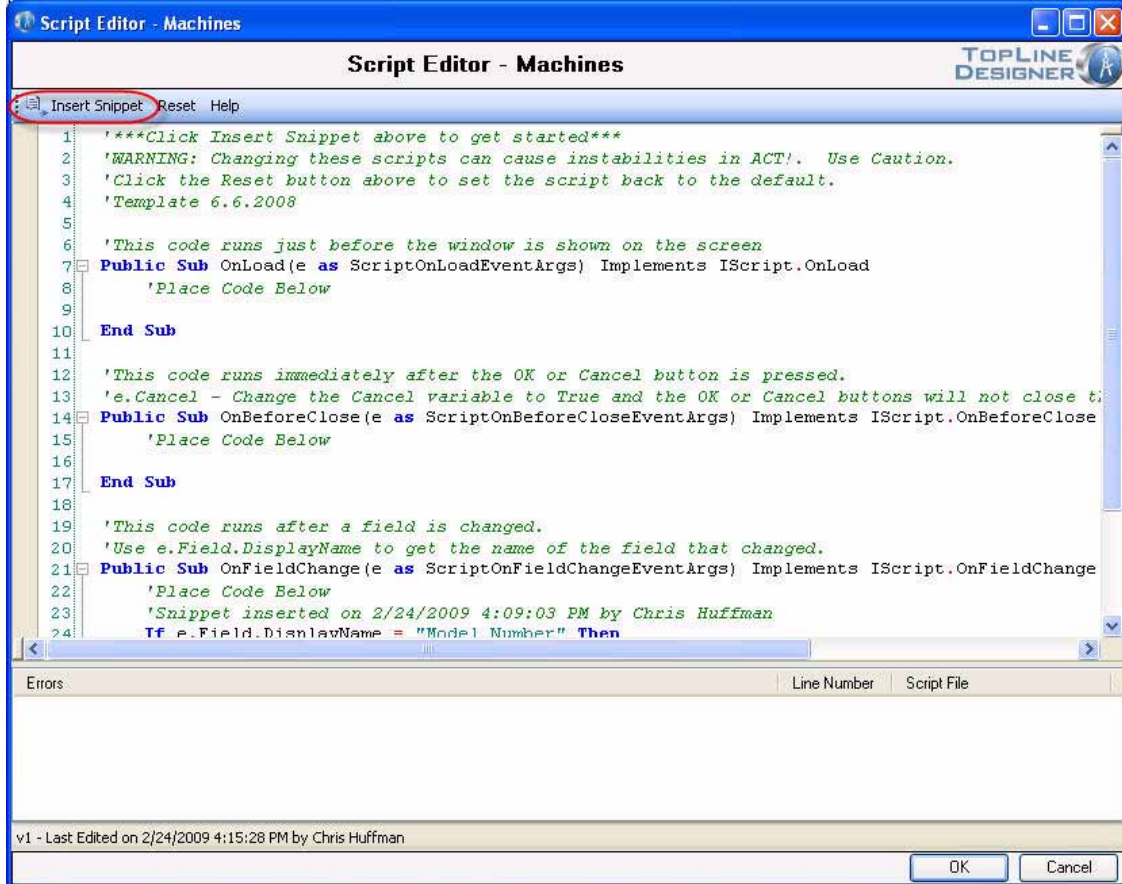
[Using Snippets](#)  
[Scripting Assistance](#)

Home > Administrator Functions > Managing Custom Table Screens > Editing Screen Scripts > Using Snippets

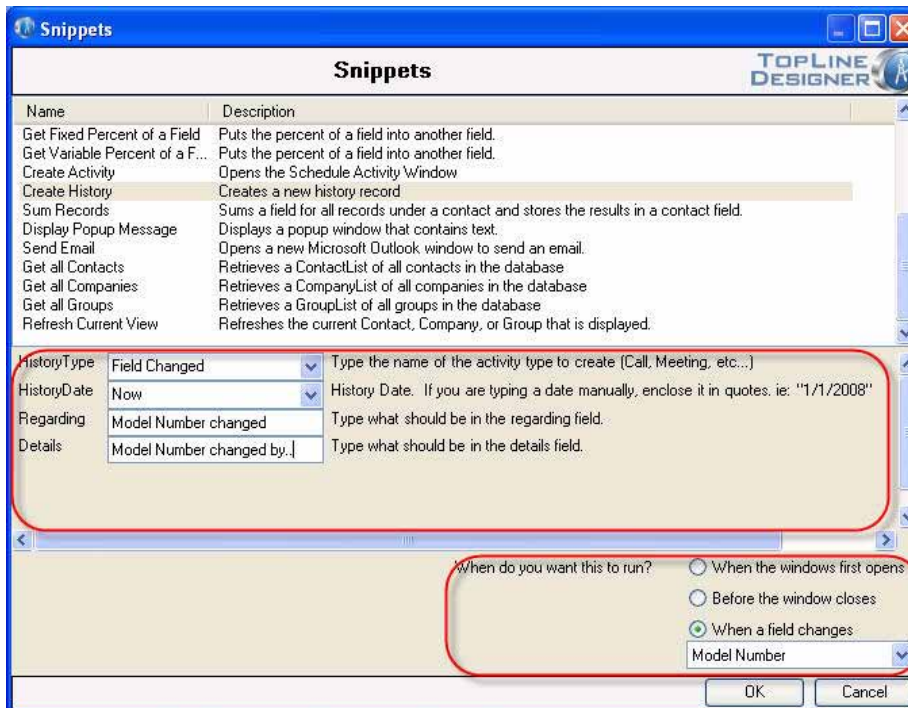
## Using Snippets

TopLine Designer include several "snippets" to help the ACT! Administrator perform several common functions. To use a snippet:

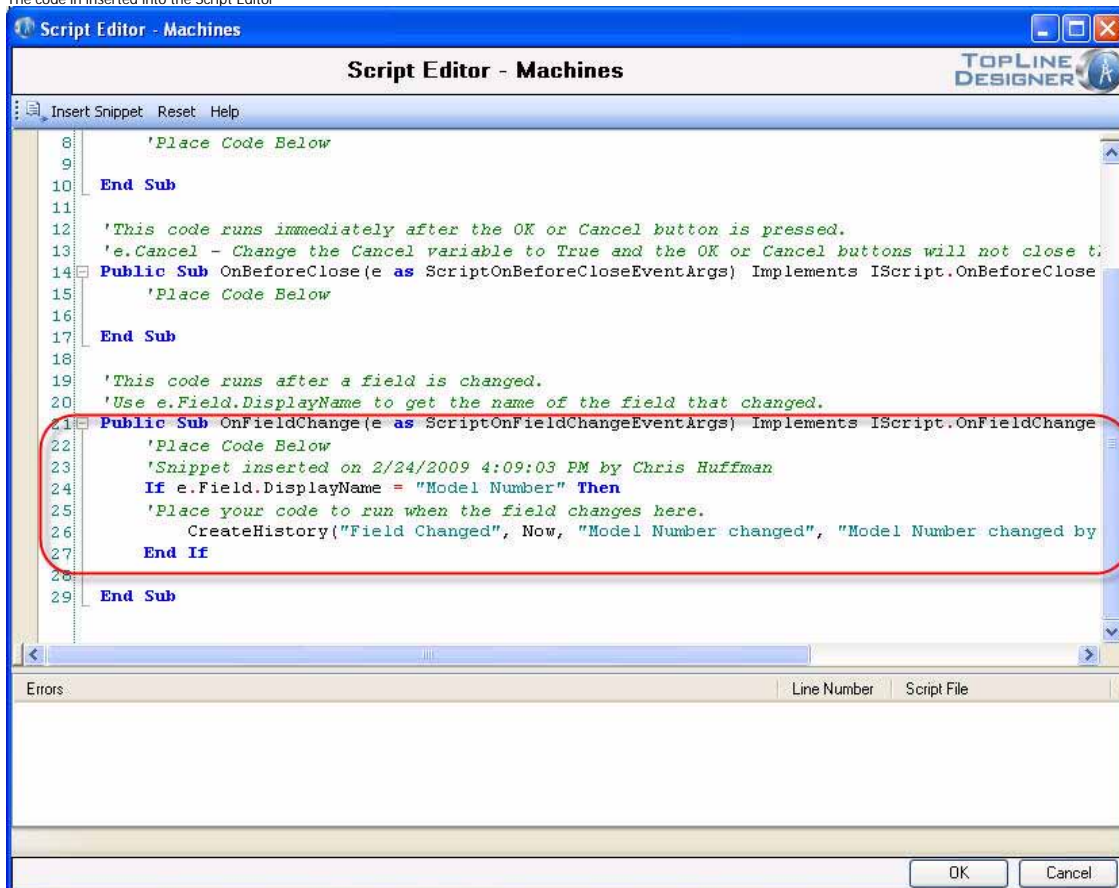
1. From the Script Designer, click on Insert Snippet.



2. Select the appropriate snippet, fill in the wizard fields and assign the snippet to an event.



3. The code is inserted into the Script Editor



4. Click OK to close the Script Editor and have the Visual Basic code checked

## See also

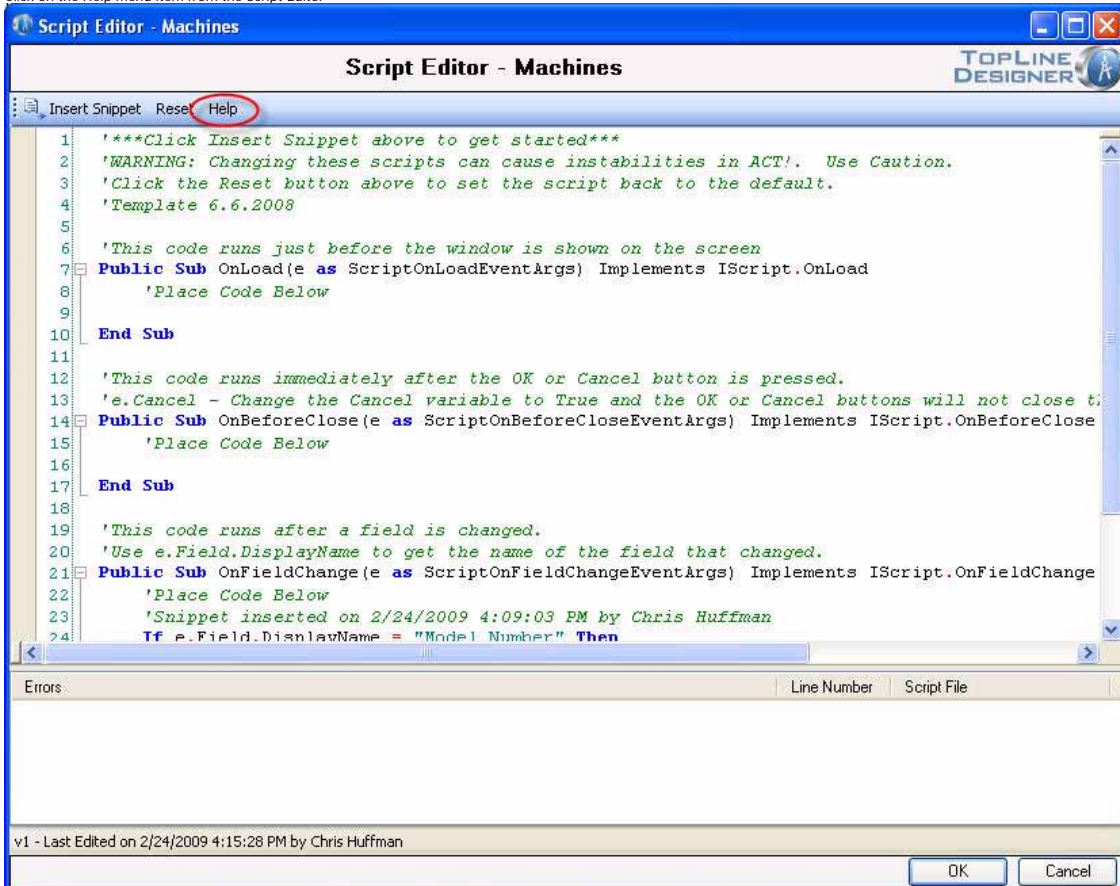
[Scripting Events](#)  
[Scripting Assistance](#)

Home > Administrator Functions > Managing Custom Table Screens > Editing Screen Scripts > Scripting Assistance

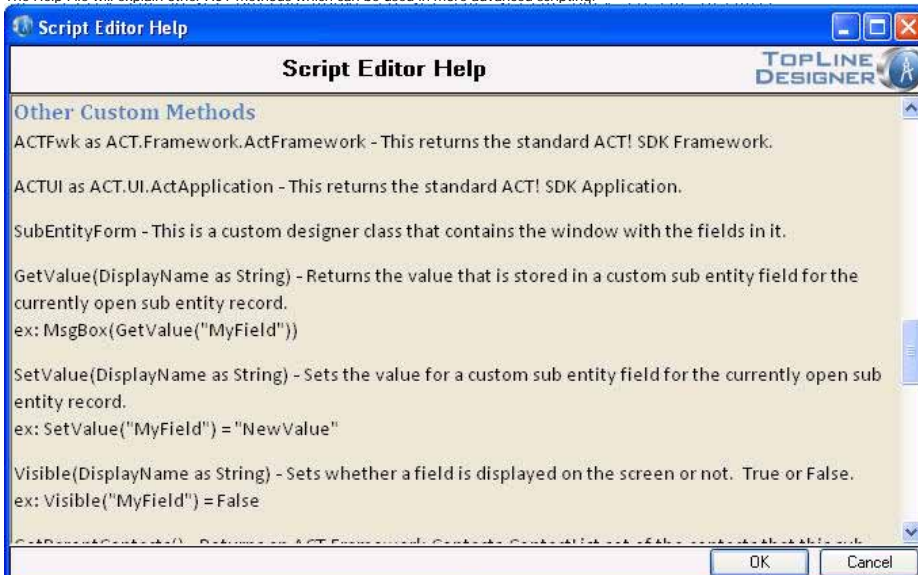
## Scripting Assistance

The TopLine Designer Script Editor includes a help file which explains all the current snippets and give other ACT methods for advanced scripting. TopLine Results also offers Scripting Consulting via our store at <http://store.toplineresults.com>.

1. Click on the Help menu item from the Script Editor



2. The Help File will explain other ACT methods which can be used in more advanced scripting.



See also

Scripting Events  
Using Snippets

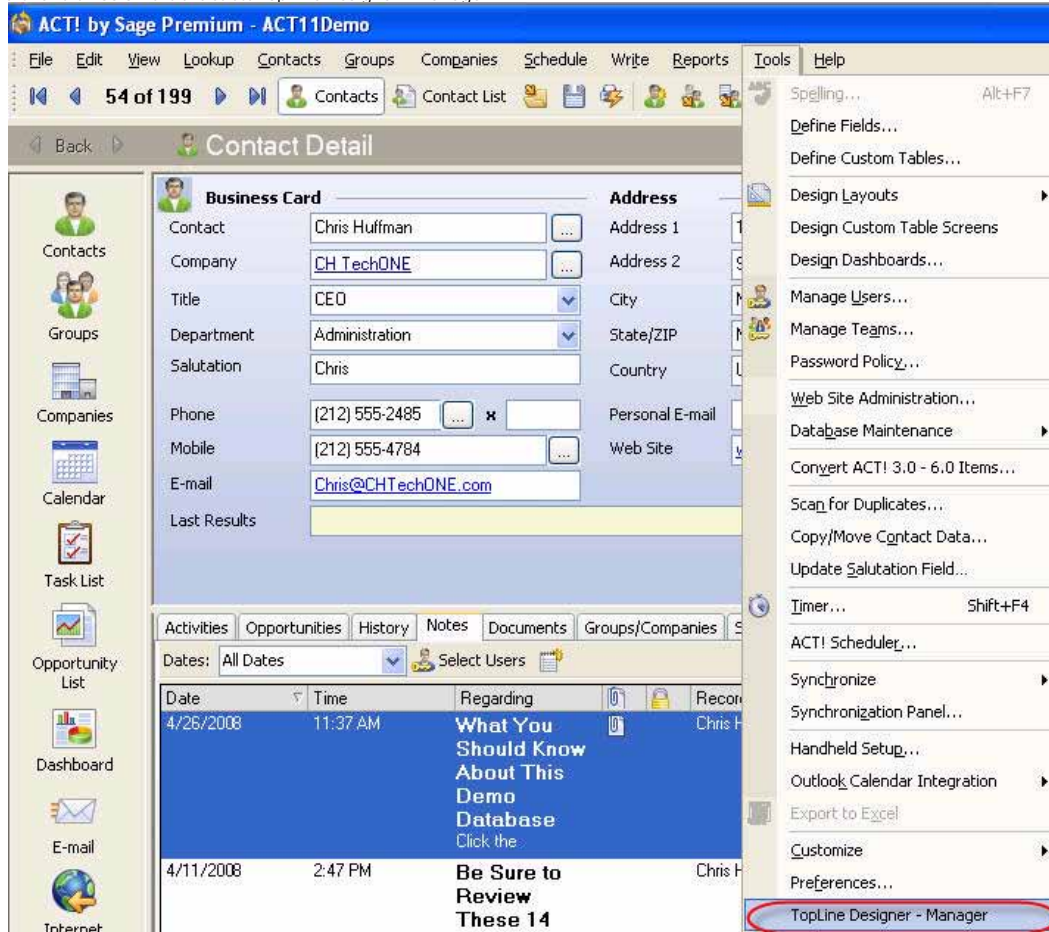
Home > Administrator Functions > Migrating Data

## Migrating Data

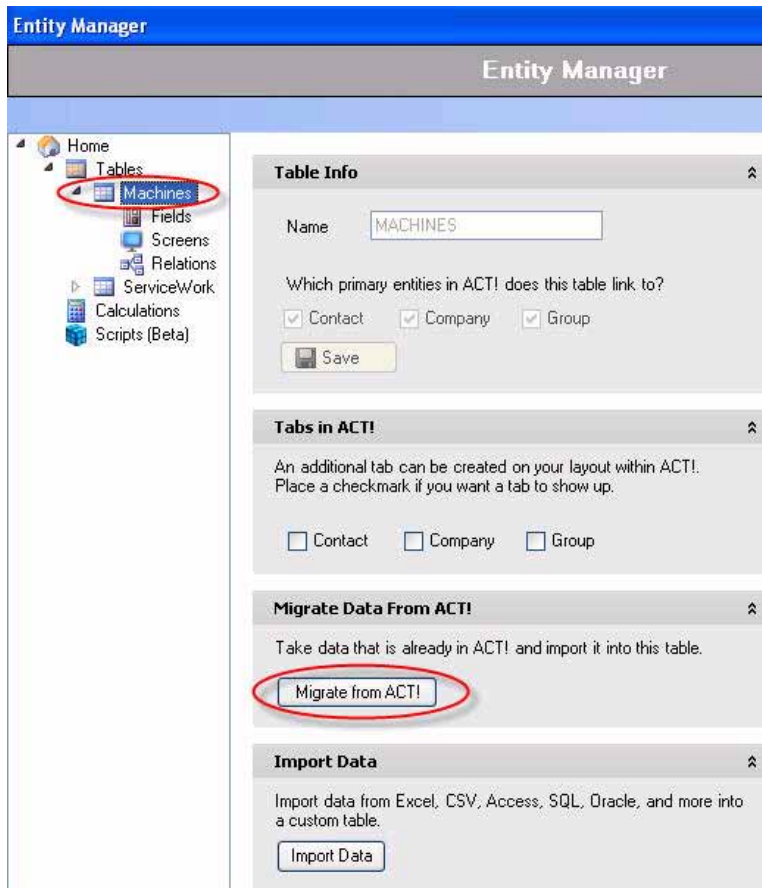
Migrating data allows the administrator to copy data from existing contact, company or group fields into new custom table records. For example, contact data such as:

	Machine Location	Machine Type	Model Number
Machine #1	First Floor	Alpha	abc135
Machine #2	Basement	Beta	bgt456
Machine #3	Outside	Gamma	ujn678

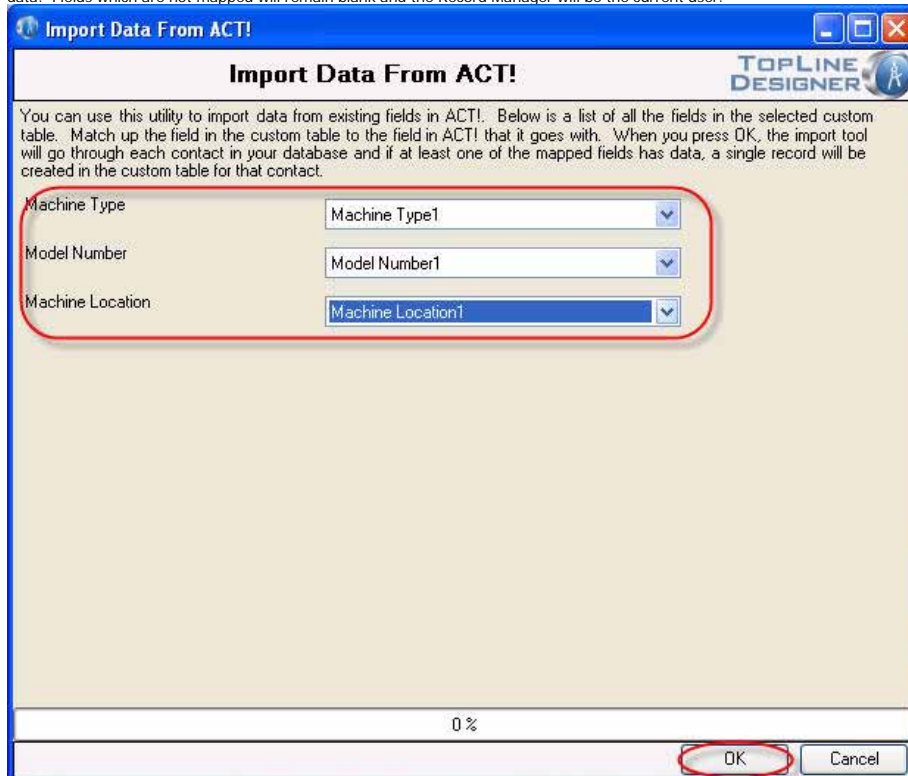
1. Open ACT!
2. Click on the Tools menu and select TopLine Designer - Manager...



3. Click the desired Custom Tables for migration and press the Migrate from ACT! button.



4. A Migrate Data from ACT! window will appear. Every field in the custom table will appear along with a drop down. Select the appropriate contact field to map data. Fields which are not mapped will remain blank and the Record Manager will be the current user.



5. Click the OK button. A confirmation dialog box will appear. Click Yes and watch the progress bar.



When completed, a dialog box will ask if you would like to perform another migrate. Repeat for all additional rows.



6. Click OK to close the Define Fields Window.

NOTE: Rows for which all data is empty will not create new Custom Table records.

### See also

- [Applying Preconfigured Template](#)
- [Managing Tables](#)
- [Managing Custom Table Screens](#)
- [Importing Data](#)
- [Managing Word Templates](#)
- [Managing Schema](#)

Home > Administrator Functions > Importing Data

## Importing Data

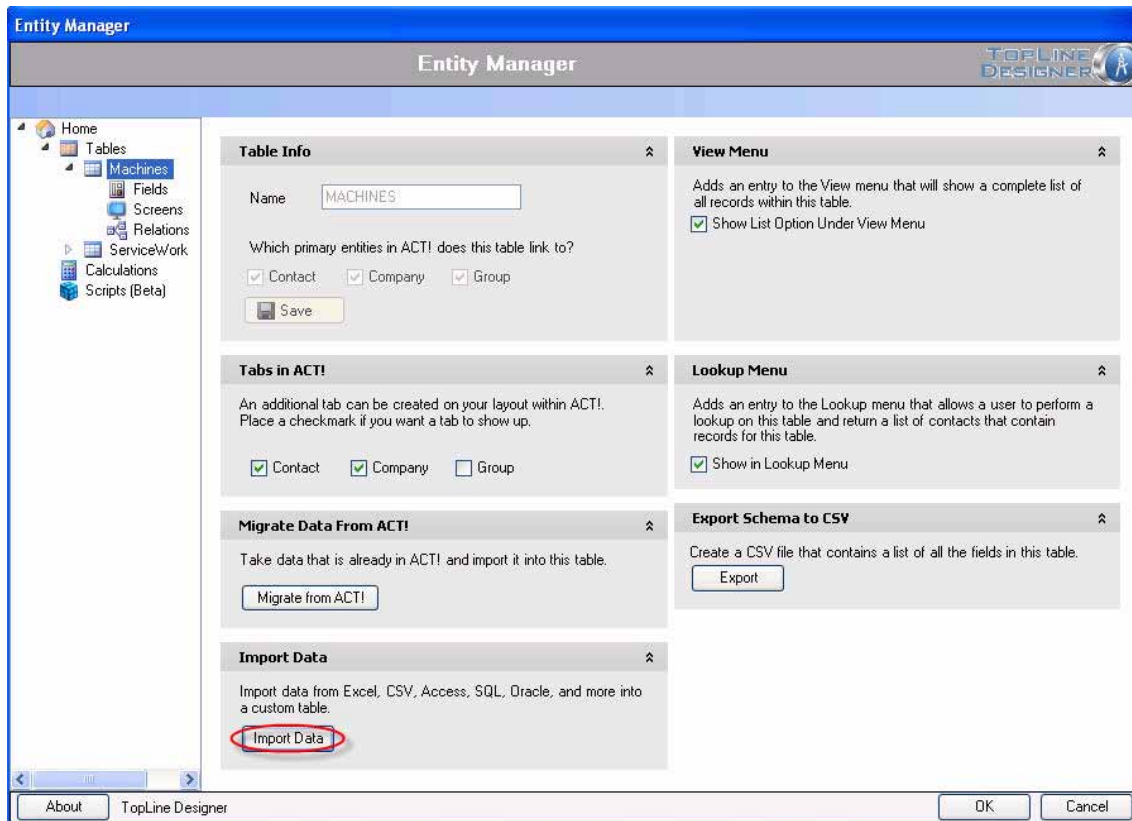
Data can be imported into the Custom Tables from CSV files or other data sources. The source data must have one (and only one) field to match the parent table (i.e. Contact, Company, Group, or other Custom Table).

1. Open ACT!
2. Click on the Tools menu and select TopLine Designer - Manager...

The screenshot shows the ACT! software interface. The main window is titled "ACT! by Sage Premium - ACT11Demo". The menu bar includes File, Edit, View, Lookup, Contacts, Groups, Companies, Schedule, Write, Reports, Tools, and Help. The "Tools" menu is open, showing various options, with "TopLine Designer - Manager" highlighted at the bottom. The main content area displays a "Contact Detail" form for "Chris Huffman", CEO of "CH TechONE". The form includes fields for Contact, Company, Title, Department, Salutation, Phone, Mobile, E-mail, Address, City, State/ZIP, Country, Personal E-mail, and Web Site. Below the form is a table of activities:

Date	Time	Regarding	Record
4/26/2008	11:37 AM	What You Should Know About This Demo Database Click the	Chris H
4/11/2008	2:47 PM	Be Sure to Review These 14	Chris H

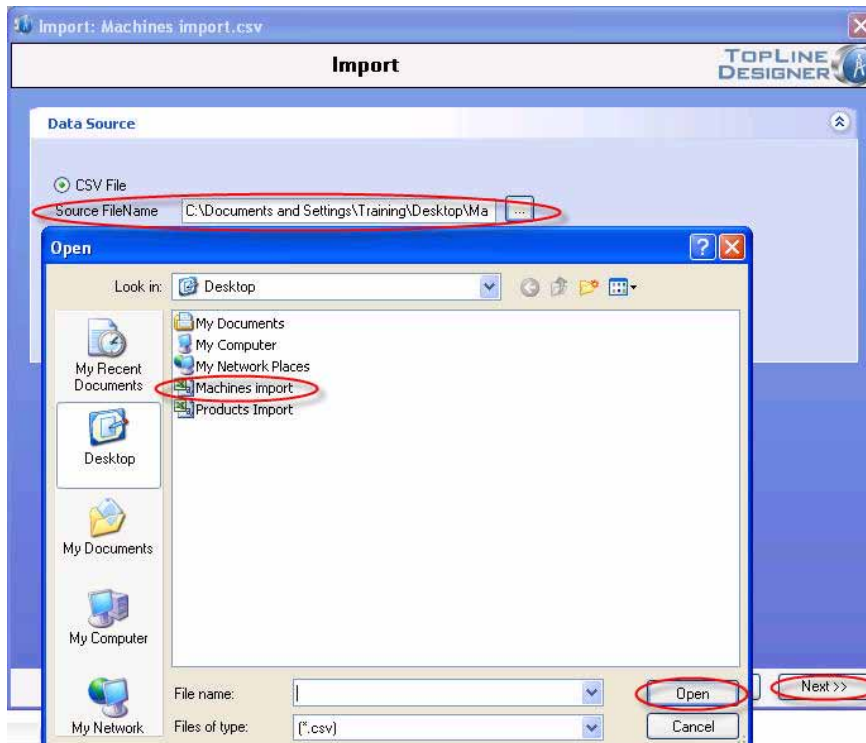
3. Click the desired Custom Tables for migration and press the Import Data button.



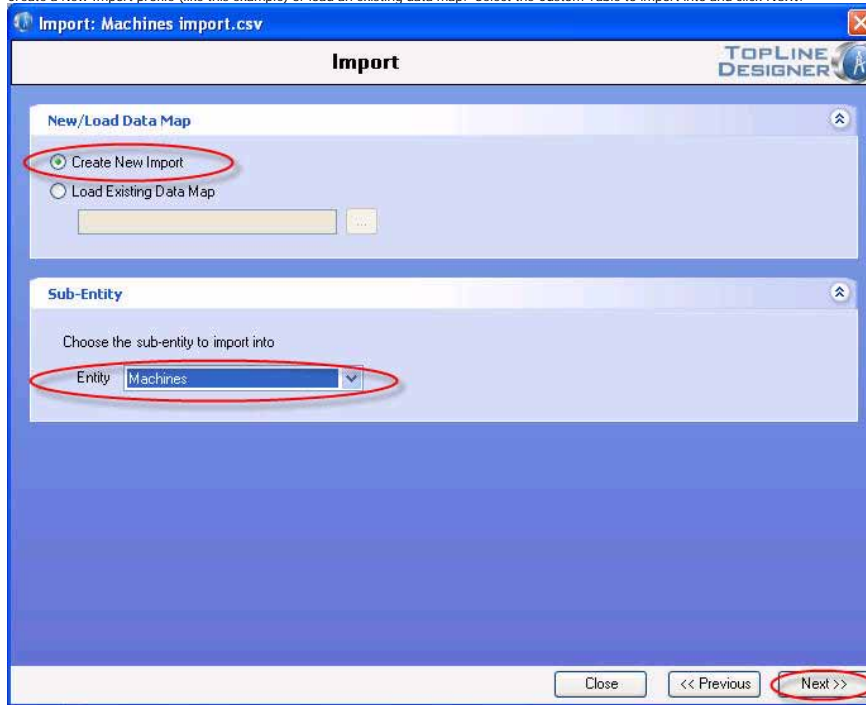
4. The Import Wizard will begin. Click Next.



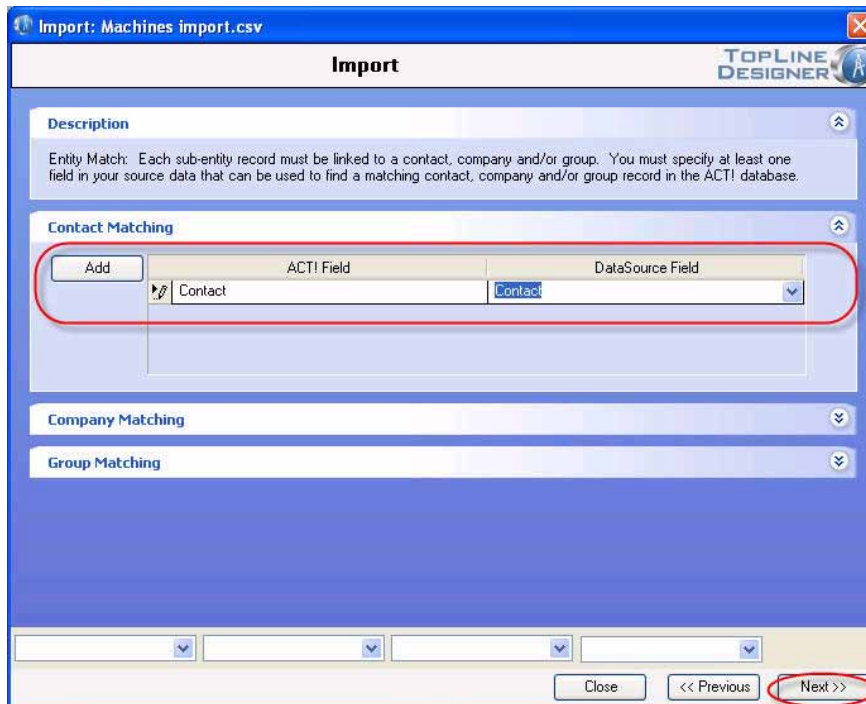
5. Select a CSV or other datasource. This example will be with a CSV file. Click Next to continue.



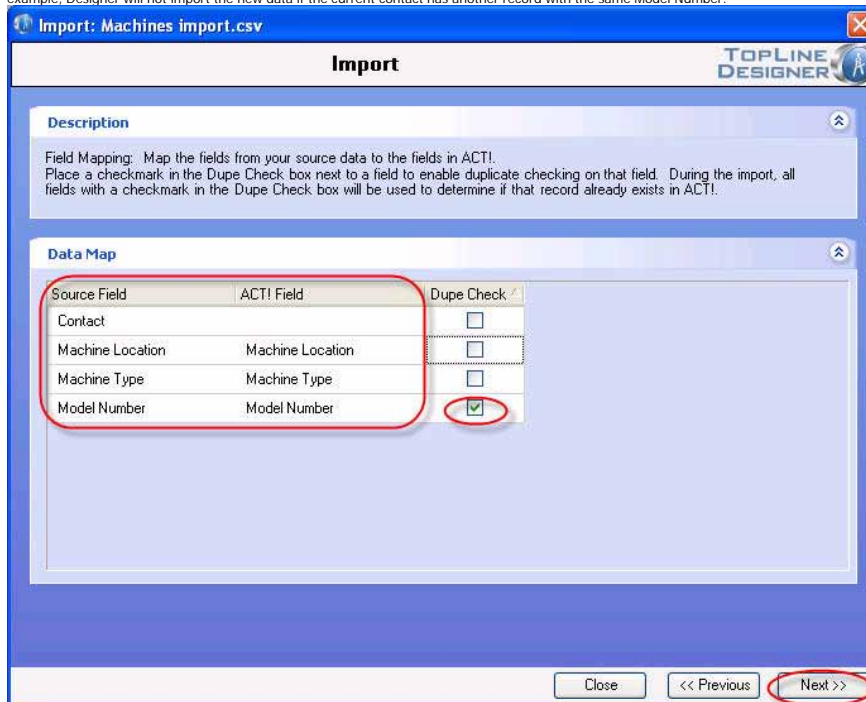
6. Create a New Import profile (like this example) or load an existing data map. Select the Custom Table to import into and click Next.



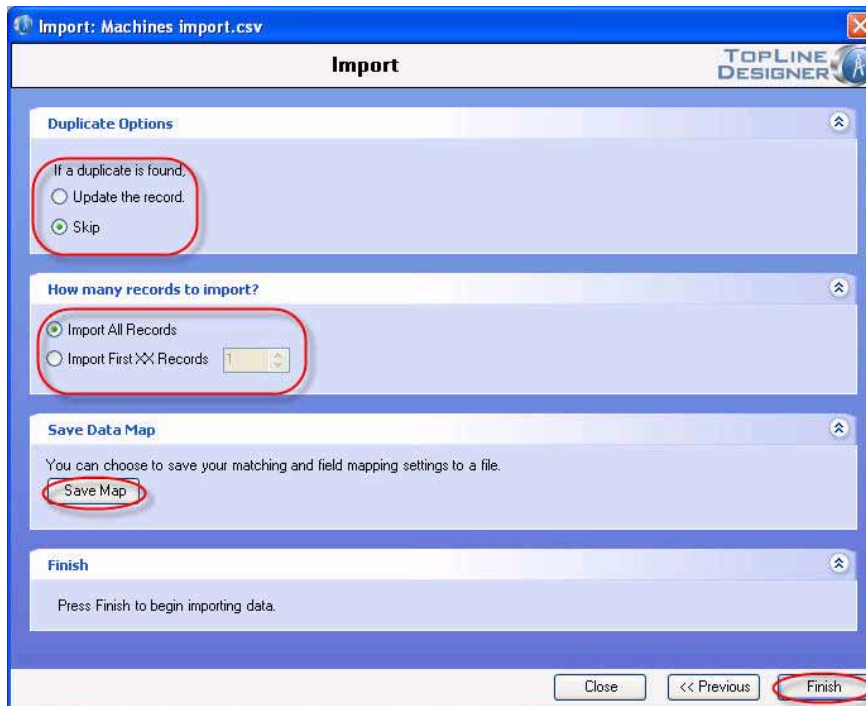
7. Map the Datasource file to the ACT1 field to find the proper Parent entity. In this example, the custom table will be matched to the Contact entity by the Contact field in the CSV file to the Contact field in ACT1. Click Next.



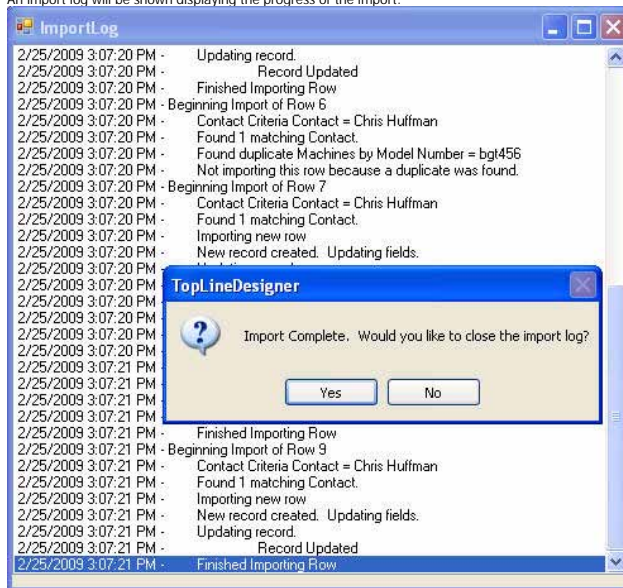
8. First, map the Source fields to the Custom Table ACT! fields. Select the Dupe Check box to have TopLine Designer check for duplicates based upon that field prior to importing. For this example, Designer will not import the new data if the current contact has another record with the same Model Number.



9. If a duplicate is found, have Designer update (replace) the matching record or skip the matching record. The number of records imported can be restricted to test the import settings. All import settings can be saved for future imports. Click Finish to begin the actual import.



10. An import log will be shown displaying the progress of the import.



11. The data is imported. Notice the records with Company=(none) were updated because Company was not in the source data and was not matched.

Contact	Company	Machine Location	Machine Type	Model Number	Record Manager
Chris Huffman	CH TechONE	First Floor	Alpha	abc135	Chris Huffman
Chris Huffman	(none)	Outside	Gamma	wnd555	Chris Huffman
Chris Huffman	CH TechONE	Outside	Gamma	ujn678	Chris Huffman
Chris Huffman	(none)	Roof	Alpha	yhn369	Chris Huffman
Chris Huffman	CH TechONE	Basement	Beta	bgt456	Chris Huffman
Chris Huffman	(none)	Storage	Gamma	qwe982	Chris Huffman
Chris Huffman	(none)	Basement	Gamma	mde698	Chris Huffman

See also

- [Applying Preconfigured Template](#)
- [Managing Tables](#)
- [Managing Custom Table Screens](#)
- [Migrating Data](#)

[Managing Word Templates](#)  
[Managing Schema](#)

[Home](#) > [Administrator Functions](#) > [Managing Word Templates](#)

## Managing Word Templates

The administrator can manage Word Templates which use Custom Table fields.

### Creating a New Template

To create a new template, navigate to a tab that contains a record to merge and right click on a record.

This will launch a new Microsoft Word document along with a popup window titled Merge Fields.

You can now create your document using Microsoft Word. When you want to insert a merged field, place your cursor in Microsoft Word in the location where you want the merged field to be inserted and double click on the field in the popup window.

Click on the Entity dropdown to select fields from different tables. The choices are:

- [Custom Table] – This is the primary table that you will be merging.
- My Record – This will insert contact fields. It will merge with data from your My Record contact.
- Contact – This will insert contact fields. It will merge with data from the selected record's parent contact.
- Company – This will insert contact fields. It will merge with data from the selected record's parent company.
- Group – This will insert group fields. It will merge with data from the selected record's parent group.

Not all of these options are always available.

Once you have created your document, you must click on the Save and Close button on the popup window to save your template. **Do not use the Save feature in Microsoft Word.** Give the template a unique name.

### Editing an Existing Template

To edit an existing template, navigate to a tab that contains a record to merge. Right click, choose Write and choose Edit Template.

Choose the template you want to edit from the Open File box and click Open. The template must have been created using the procedure indicated in the above section. You cannot edit a template that was created manually in Microsoft Word or in ACT!

The procedure for editing a template is the same as creating a new template. When finished, click on the Save and Close button. **Do not use the Microsoft Word Save function.** After clicking on Save and Close, you will be asked if you want to update the template. If you select Yes, the document will be saved using the same filename. If you choose No, then you will be prompted to enter a new filename for the template.

### Nested Custom Table Entities in a Template

If there are Custom Tables which have a relationship, the template can include the parent custom table fields and all of the related child custom table fields. There are only a couple of steps involved in creating a table that contains a list of related child records.

Create a new table in Microsoft Word that contains exactly two rows and however many columns you want with one column per field you want to merge.

In the first row, you need to specify which field should be merged into each column. You do so by using the following format:

Designer.[TABLENAME].[FIELDNAME]

You must always start with the word Designer followed by a period. Specify the table you want to merge in followed by a period. Specify the field name. Example: Designer.Services.Duration where Services is the name of the table and duration is the field that you want to place into that cell.

### See also

[Applying Preconfigured Template](#)

[Managing Tables](#)

[Managing Custom Table Screens](#)

[Migrating Data](#)

[Importing Data](#)

[Managing Schema](#)

[Home](#) > [Administrator Functions](#) > [Managing Schema](#)

## Managing Schema

TopLine Designer allows the administrator to create custom tables, fields, screens and scripts in a test environment without affecting production. Once the project has been fully built and tested, the administrator can export the TopLine Designer settings and apply them to one or many production databases. Only settings will be applied; no test data will be copied to production.

### Articles in this section



[Exporting Schema Changes](#)



[Importing Schema Changes](#)

### See also

[Applying Preconfigured Template](#)  
[Managing Tables](#)  
[Managing Custom Table Screens](#)  
[Migrating Data](#)  
[Importing Data](#)  
[Managing Word Templates](#)

breadcrumbs]

## Exporting Schema Changes

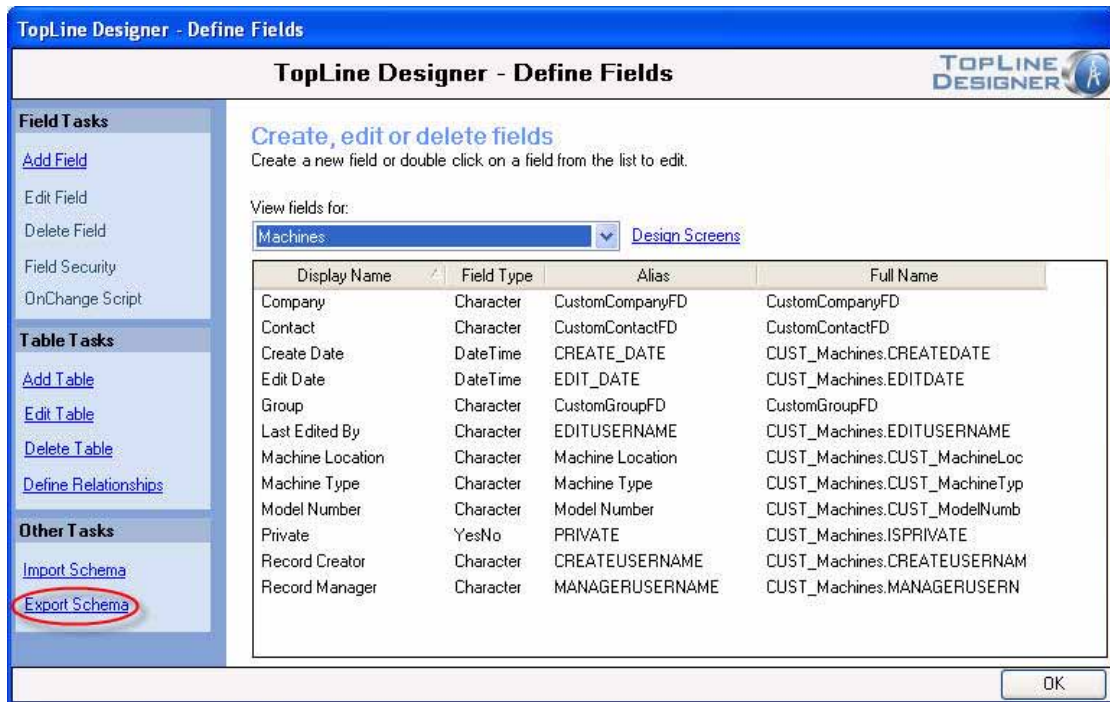
Exporting TopLine Designer Schema can be located on the Define Fields Windows.

1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...

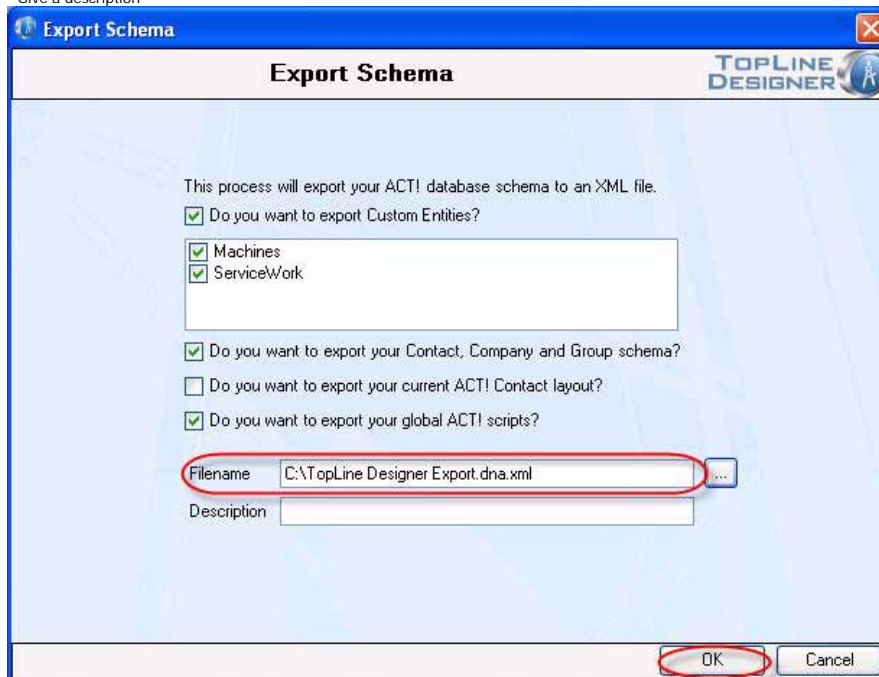
The screenshot shows the ACT! by Sage Premium - ACT11Demo application. The 'Tools' menu is open, and 'Define Custom Tables...' is highlighted with a red circle. The background shows a 'Contact Detail' window for Chris Huffman, CH TechONE, CEO, and a table of activities.

Type	Date	Time	Priority	Sche
	8/9/2008	9:30 AM	Medium-Low	Chris
	8/12/2008	7:00 AM	Low	Chris
	8/15/2008	8:30 AM	Medium	+Bet
	8/15/2008	4:00 PM	Medium-Low	Chris
	8/22/2008	8:30 AM	Medium	+Fre
	9/1/2008	8:00 AM	Low	Chris
	9/2/2008	12:00 PM	High	Chris
	9/3/2008	6:30 PM	Medium-Low	Chris
	9/12/2008	8:00 AM	Medium	+Ern
	9/19/2008	4:00 PM	Medium	Chris

3. Click the Export Schema link.



- From the Export Schema dialog window:
  - Select the Custom Table Entities
  - Select the other ACT! items to include
  - Enter the Filename for the export
  - Give a description



- Click OK to close the Define Fields Window.

See also

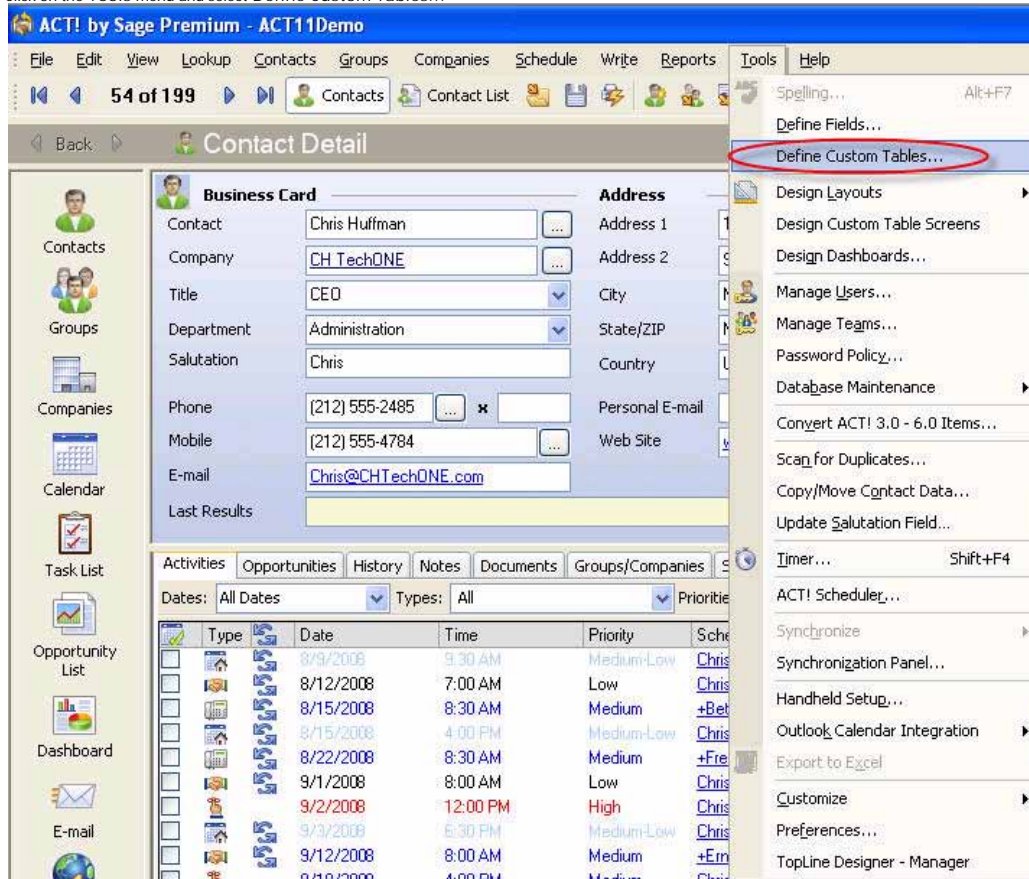
[Importing Schema Changes](#)

Home > Administrator Functions > Managing Schema > Importing Schema Changes

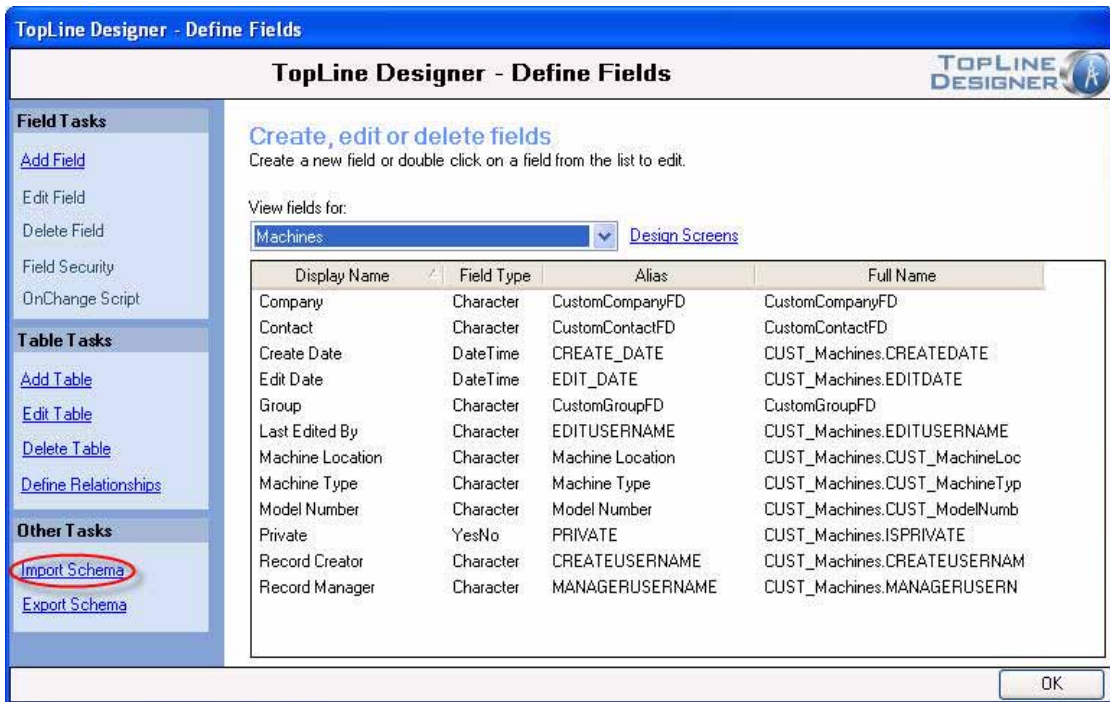
## Importing Schema Changes

Importing TopLine Designer Schema can be located on the Define Fields Windows.

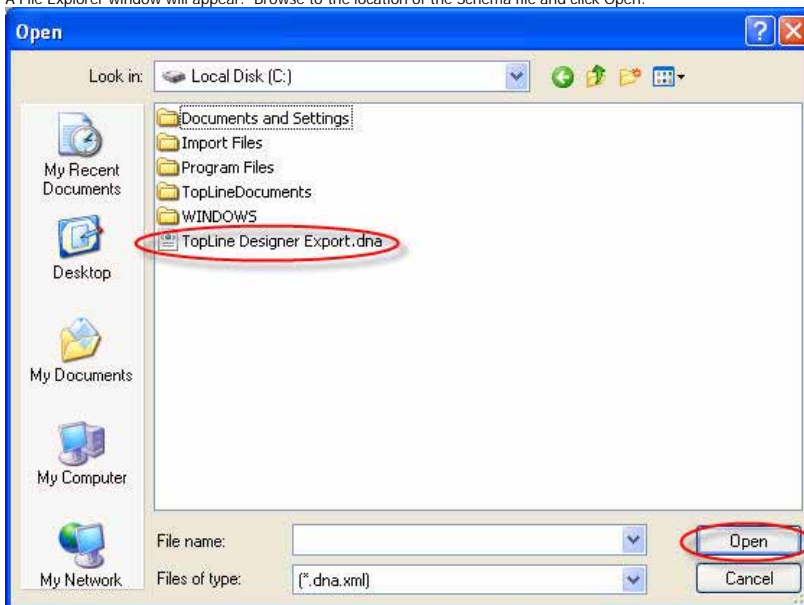
1. Open ACT!
2. Click on the Tools menu and select Define Custom Tables...



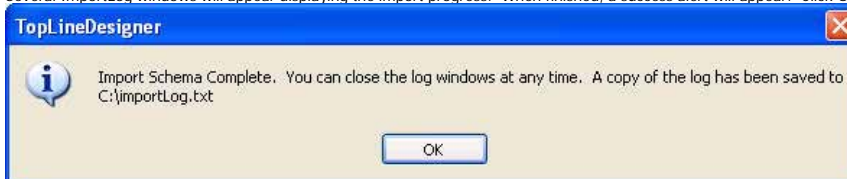
3. Click on the Import Schema link.



4. A File Explorer window will appear. Browse to the location of the Schema file and click Open.



5. Several ImportLog windows will appear displaying the import progress. When finished, a success alert will appear. Click OK to continue.



6. Then newly created custom tables and fields will now be visible. Click OK to close the Define Fields Window.

See also

[Exporting Schema Changes](#)

[Home](#) > [End User Functions](#)

For the ACT! Windows user:

- **View tables interactively, go to the corresponding contact, company or group.**
- **Drill down on custom tables to access the detail view.**
- **Create a contact, company or group lookup.**
- **Click to sort or filter in the list view.**
- **Create robust queries and apply date ranges.**
- **Perform advanced calculations among fields and in the list view.**
- **Create activities or histories based on custom-table fields.**
- **Generate email notifications.**
- **Modify field appearance (auto hide, change color) based on conditions.**
- **Drag and drop fields to group and organize your custom lists.**
- **Organize, sort or query your documents.**
- **Export list views to MS Excel.**
- **Merge custom-table fields into MS Word to create documents and templates.**
- **Synchronize your customizations and data.**
- **Integrate with TopLine Dash for enhanced reporting and graphical views.**
- **Automate your Excel or PDF custom table reports using TopLine Dash Alerts.**

### Articles in this section



[Using Designer Tabs](#)



[Using List View](#)



[Using Lookups](#)

### See also

[Welcome](#)  
[Installation](#)  
[Administrator Functions](#)  
[Windows vs Web Functionality](#)  
[Integration with TopLine Dash](#)  
[FAQ](#)  
[Videos](#)

Home &gt; End User Functions &gt; Using Designer Tabs

## Using Designer Tabs

TopLine Designer Custom Table data is displayed as a tab under the Contact, Company or Group layout (as controlled by the ACT! Administrator) and are always right of the static tabs. Tab names are controlled by the Screen names.

The screenshot displays the ACT! CRM interface for a contact record. The top section shows contact details for CH TechONE, including contact information, address, and company information. Below this is a list of activities with columns for Date, Time, Regarding, Record Manager, and Group/Company. The 'Machines' and 'ServiceWork' tabs are highlighted with a red circle. The bottom status bar shows the user name 'Chris Huffman'.

Date	Time	Regarding	Record Manager	Group/Company
4/26/2008	11:37 AM	<b>What You Should Know About This Demo Database</b> Click the	Chris Huffman	CH TechONE
4/11/2008	2:47 PM	<b>Be Sure to Review These 14 ACT! Features</b>	Chris Huffman	CH TechONE
2/13/2005	3:49 PM	Visit ACT! Add-	Chris Huffman	

See also

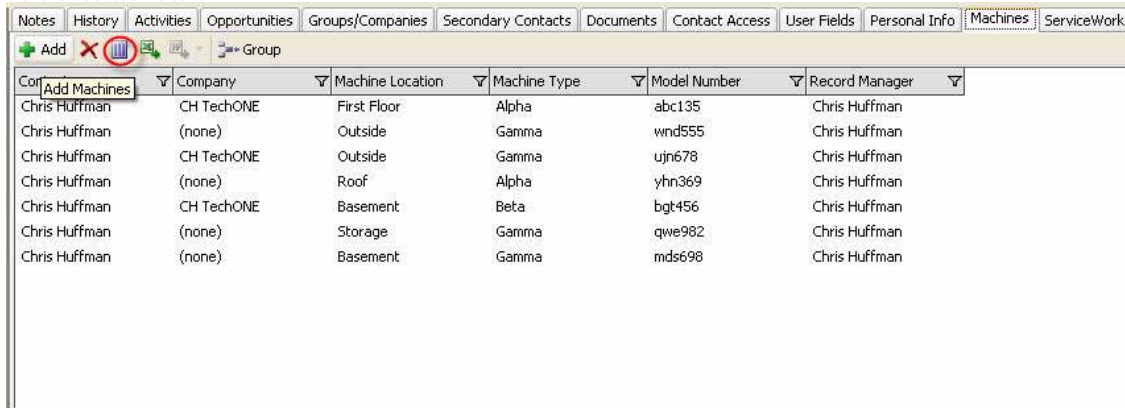
[Using List View](#)  
[Using Lookups](#)

Home > End User Functions > Using Designer Tabs > Managing Display Columns

## List Views in TopLine Designer

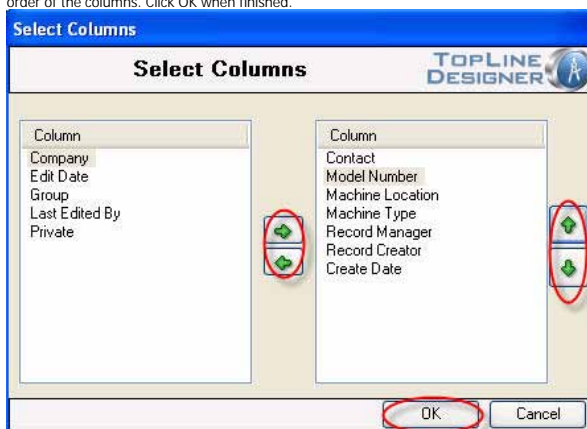
This opening paragraph should describe the feature that you are documenting. Explain how it is commonly used and what the benefits are. For example: The Widget Master email link allows you to easily send information about each widget to various departments within your company. Often, the feature that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

1. Click on the blue columns icon.

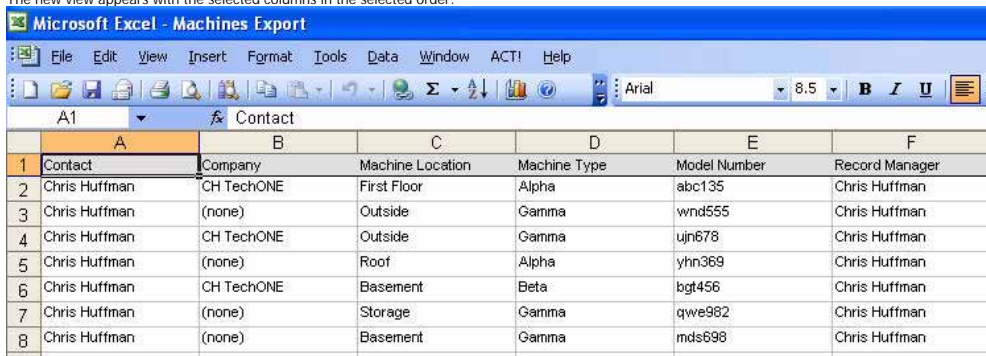


Contact	Company	Machine Location	Machine Type	Model Number	Record Manager
Chris Huffman	CH TechONE	First Floor	Alpha	abc135	Chris Huffman
Chris Huffman	(none)	Outside	Gamma	wnd555	Chris Huffman
Chris Huffman	CH TechONE	Outside	Gamma	ujn678	Chris Huffman
Chris Huffman	(none)	Roof	Alpha	yhn369	Chris Huffman
Chris Huffman	CH TechONE	Basement	Beta	bgt456	Chris Huffman
Chris Huffman	(none)	Storage	Gamma	qwe982	Chris Huffman
Chris Huffman	(none)	Basement	Gamma	mds698	Chris Huffman

2. Use the left and right arrows in the middle of the dialog box to add and remove columns from the view. Use the up and down arrows on the right of the dialog box to change the order of the columns. Click OK when finished.



3. The new view appears with the selected columns in the selected order.



	A	B	C	D	E	F
1	Contact	Company	Machine Location	Machine Type	Model Number	Record Manager
2	Chris Huffman	CH TechONE	First Floor	Alpha	abc135	Chris Huffman
3	Chris Huffman	(none)	Outside	Gamma	wnd555	Chris Huffman
4	Chris Huffman	CH TechONE	Outside	Gamma	ujn678	Chris Huffman
5	Chris Huffman	(none)	Roof	Alpha	yhn369	Chris Huffman
6	Chris Huffman	CH TechONE	Basement	Beta	bgt456	Chris Huffman
7	Chris Huffman	(none)	Storage	Gamma	qwe982	Chris Huffman
8	Chris Huffman	(none)	Basement	Gamma	mds698	Chris Huffman

See also

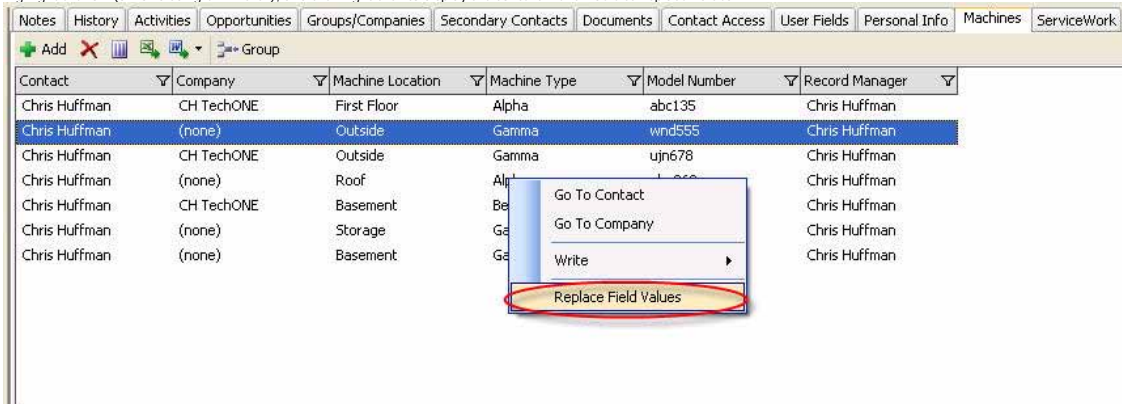
[Adding / Deleting Entities](#)  
[Grouping / Filtering](#)  
[Replace Values](#)  
[Exporting to Excel](#)  
[Merge to Word](#)

Home > End User Functions > Using Designer Tabs > Replace Values

## Replace Values

Values can be replaced in multiple Custom Table records.

1. Highlight the row (or rows using CNTL-click), and then right click to display the context menu. Select Replace Values.



2. The Replace dialog box will appear. Select a method (Replace or Append), a field and enter a value. Click OK.



3. The new values will appear in the tab.



### See also

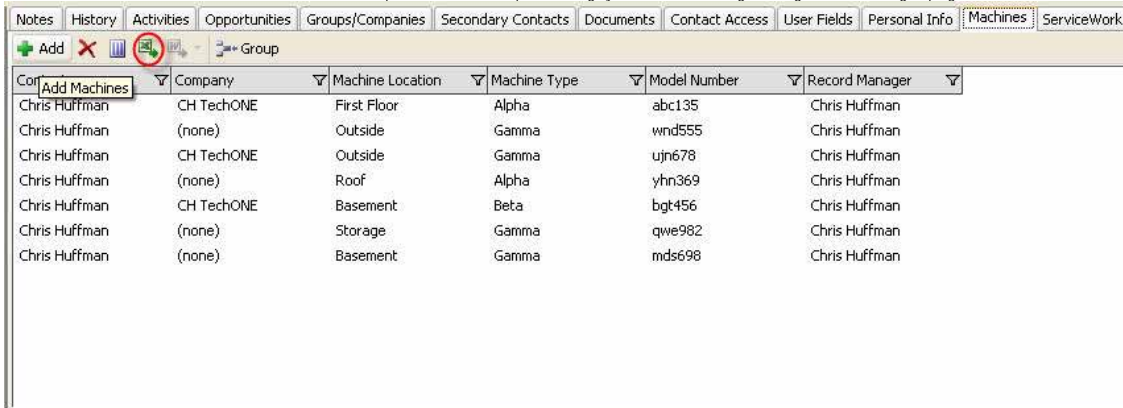
[Adding / Deleting Entities](#)  
[Managing Display Columns](#)  
[Grouping / Filtering](#)  
[Exporting to Excel](#)  
[Merge to Word](#)

Home > End User Functions > Using Designer Tabs > Exporting to Excel

## Exporting to Excel

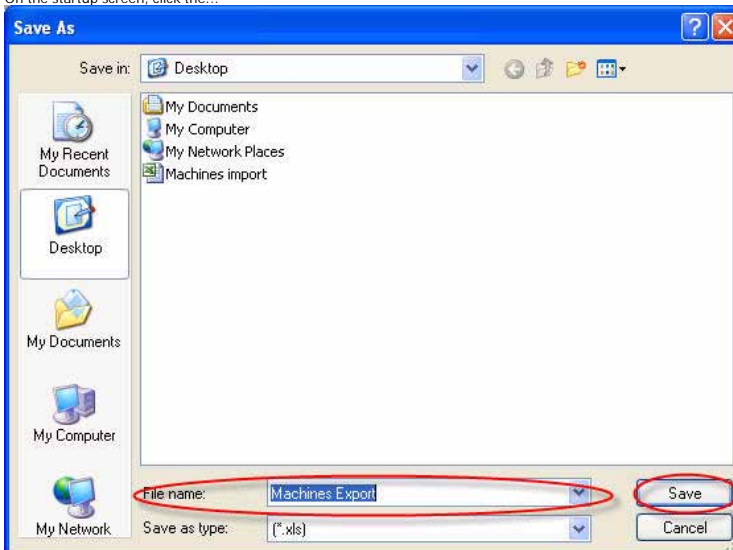
### Export to Excel.

1. Select either the Tab view or the list view. Note that the Export to excel will keep the settings you have from sorting, filtering, columns, and grouping as well.

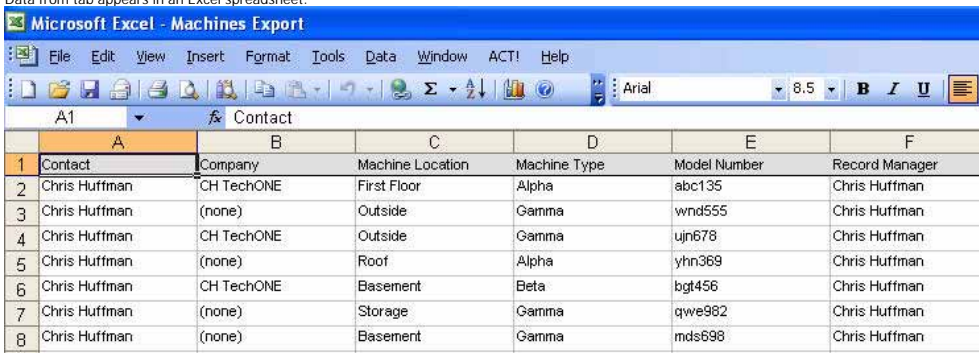


Company	Machine Location	Machine Type	Model Number	Record Manager
CH TechONE	First Floor	Alpha	abc135	Chris Huffman
(none)	Outside	Gamma	wnd555	Chris Huffman
CH TechONE	Outside	Gamma	ujn678	Chris Huffman
(none)	Roof	Alpha	yhn369	Chris Huffman
CH TechONE	Basement	Beta	bgt456	Chris Huffman
(none)	Storage	Gamma	qwe982	Chris Huffman
(none)	Basement	Gamma	mds698	Chris Huffman

2. On the startup screen, click the...



3. Data from tab appears in an Excel spreadsheet.



	A	B	C	D	E	F
1	Contact	Company	Machine Location	Machine Type	Model Number	Record Manager
2	Chris Huffman	CH TechONE	First Floor	Alpha	abc135	Chris Huffman
3	Chris Huffman	(none)	Outside	Gamma	wnd555	Chris Huffman
4	Chris Huffman	CH TechONE	Outside	Gamma	ujn678	Chris Huffman
5	Chris Huffman	(none)	Roof	Alpha	yhn369	Chris Huffman
6	Chris Huffman	CH TechONE	Basement	Beta	bgt456	Chris Huffman
7	Chris Huffman	(none)	Storage	Gamma	qwe982	Chris Huffman
8	Chris Huffman	(none)	Basement	Gamma	mds698	Chris Huffman

### See also

[Adding / Deleting Entities](#)  
[Managing Display Columns](#)  
[Grouping / Filtering](#)  
[Replace Values](#)  
[Merge to Word](#)

Home > End User Functions > Using Designer Tabs > Merge to Word

## Merge to Word

With TopLine Designer MS-Word Merge Integration can:

### Merge to a template to Word

Merge directly from a row

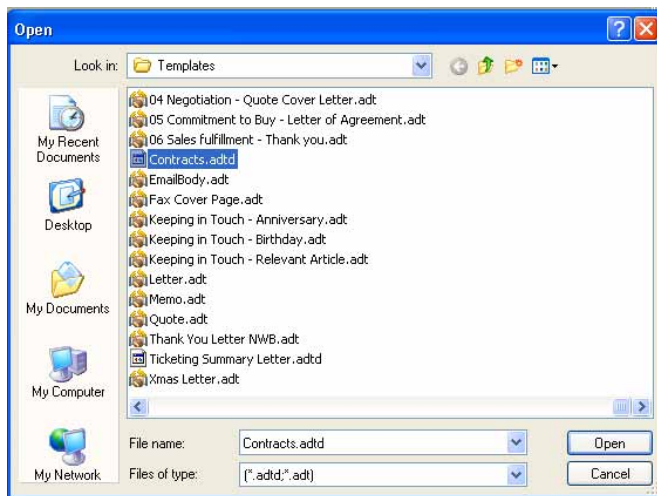
Ticket Open Date	Contact	Company	Assets	Contracts	Ticket Resolution	Ticket Duration U	Ticket Type
03/10/2009	Sean Duffy	Circle Photography		12			Ticket Type A
03/02/2009	Jonathan Jenkins	Circle Photography			Resolution 1	0.00	Ticket Type B
03/02/2009	Sean Duffy	Circle Photography		12	Resolution 2		Ticket Type A
03/13/2009	Brian David	Mix Alliance	12122656	C-CH-1007	Volume control sticks.		Ticket Type A
03/10/2009	Brian David	Mix Alliance	12122656		Sound System install		Ticket Type A
03/03/2009	Rudy Nordstrom	Jake Flakes Inc.	123145648		Resolution 2		Ticket Type B
03/02/2009	Chris Huffman	CH Gourmet Gifts	1234	C-CH-1000	Resolution 2	0.00	Ticket Type A
03/03/2009	Rudy Nordstrom	Jake Flakes Inc.	1398456		Outside case was repl		Ticket Type A
03/02/2009	Herman Getter	Continental Energy	230546		Resolution 2	0.00	Ticket Type A
03/10/2009	Mary William		23455645	C-CH-1009	Resolution 1		Ticket Type A
03/10/2009	Mary William		23455645		Resolution 2		Ticket Type A
03/03/2009	Jonathan Jenkins		412313456	C-CH-1001	Resolution 2		Ticket Type A
03/03/2009	Jonathan Jenkins		412313456		Replaced the hard dri		Ticket Type A
03/03/2009	Bill Willis				Resolution 1		Ticket Type A
03/03/2009	Bill Willis				Ink cartridges replace		Ticket Type A
03/03/2009	Bill Willis				Upgrade software to		Ticket Type A
03/03/2009	Bill Willis	Willis Enterprises			Upgraded to ACT1 20		Ticket Type A
03/10/2009	Anthony Federici	MiniSoft	54612323	C-CH-1008	Resolution 1		Ticket Type A
03/10/2009	Anthony Federici	MiniSoft	54612323		Resolution 1		Ticket Type A
03/03/2009	Bill Willis	Willis Enterprises	7895213	C-CH-1004	Resolution 1		Ticket Type B
03/03/2009	Bill Willis	Willis Enterprises	7895213		Replaced 10 head set		Ticket Type B
03/03/2009	Jonathan Jenkins	Circle Photography	897546123		Resolution 2		Ticket Type B
03/03/2009	Rudy Nordstrom	Jake Flakes Inc.	98756421		Resolution 1		Ticket Type A

Using the controls to merge a document to Word

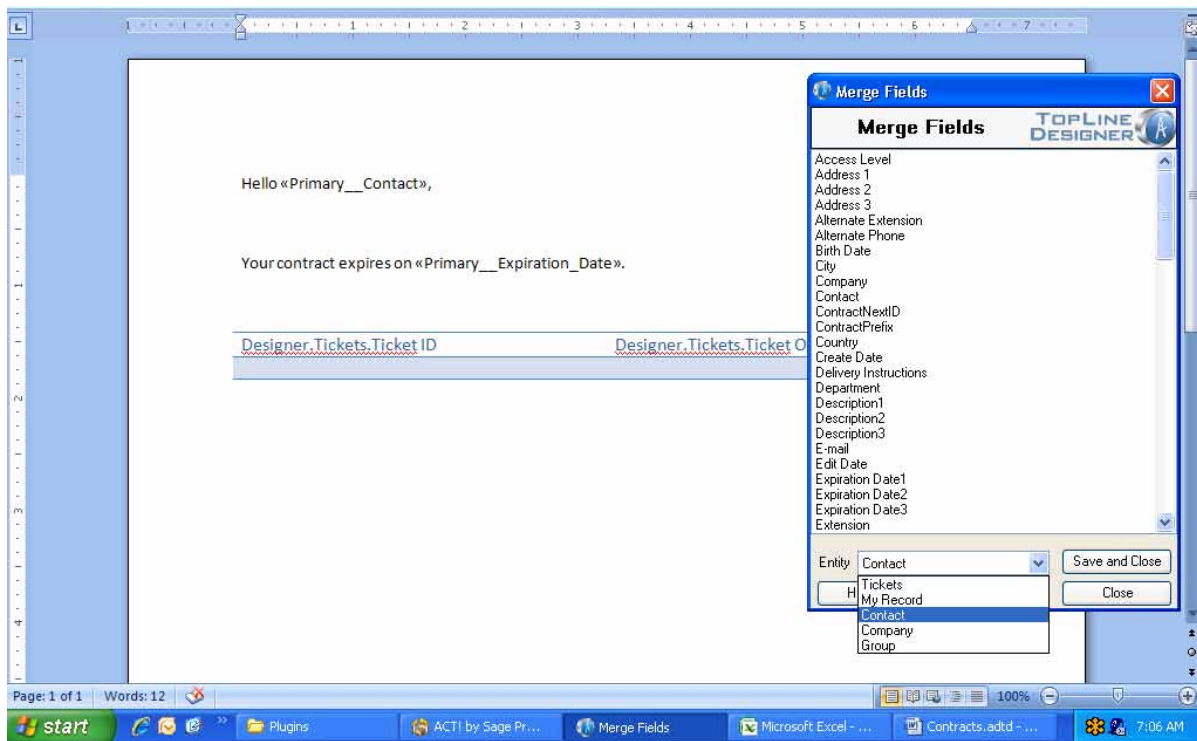
Ticket Open Date	Merge To Word
03/10/2009	
03/02/2009	New Template
03/02/2009	Edit Template

### Creating or editing an existing template

Note that the Contract template has a different extension .adtd it is important to create your template from a new one. It is also important to choose the correct list (or table-subentity) if you do not Topline Designer will attempt to create a merge in a document that does not contain any of the fields and an error will occur.



TopLine Designer allows you to create merged documents from the following fields in the same documents: Contact, Company, Group fields and from the fields in the list view sub-entity that you are in and from fields of a subentity related to the one that you are in. (You can also select fields from another list provided that the sub-entity has a child relationship to the sub-entity list.)

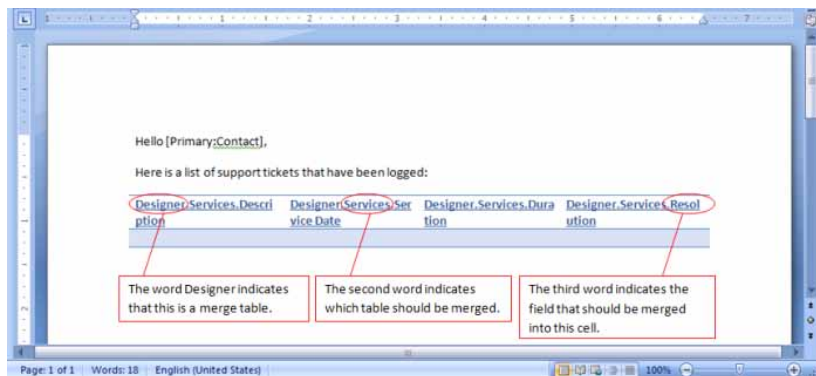


## Mail Merge to an embedded grid; Creating a table of child records

There are only a couple of steps involved in creating a table that contains a list of related child records.

1. Create a new table in Microsoft Word that contains exactly two rows and however many columns you want with one column per field that you want to merge.
2. In the first row, you need to specify which field should be merged into each column. You do so by using the following format:  
 Designer.[TABLENAME].[FIELDNAME]  
 You must always start with the word Designer followed by a period. You then specify the table that you want to merge in followed by a period. You then specify the field name.

Example: Designer.Services.Duration where Services is the name of the table and duration is the field that you want to place into that cell.



Inside word you can also embed a list in a table with the content of child sub-entity list.

## Mail Merge from multiple record rows and into separate documents

You can highlight multiple rows and mail merge each row to a separate word document.

Ticket Open Date	Contact	Company	Assets	Contracts	Ticket Resolution	Ticket Duration U	Ticket Type
03/10/2009	Sean Duffy	Circle Photography		12			Ticket Type A
03/02/2009	Jonathan Jenkins	Circle Photography			Resolution 1	0.00	Ticket Type B
03/02/2009	Sean Duffy	Circle Photography		12	Resolution 2		Ticket Type A
03/13/2009	Brian David	Mix Alliance	12122656	C-CH-1007	Volume control sticks,		Ticket Type A
03/10/2009	Brian David	Mix Alliance	12122656		Sound System install		Ticket Type A
03/03/2009	Rudy Nordstrom	Jake Flakes Inc.	123145648		Resolution 2		Ticket Type B
03/02/2009	Chris Huffman	CH Gourmet Gifts	1234	C-CH-1000	Resolution 2	0.00	Ticket Type A
03/03/2009	Rudy Nordstrom	Jake Flakes Inc.	1398456		Outside case was repl		Ticket Type A
03/02/2009	Herman Getter	Continental Energy	230546		Resolution 2	0.00	Ticket Type A
03/10/2009	Mary Williams	Average Grocery	23455645	C-CH-1009	Resolution 1		Ticket Type A
03/10/2009	Mary Williams	Average Grocery	23455645		Resolution 2		Ticket Type A
03/03/2009	Jonathan Jenkins	Circle Photography	412313456	C-CH-1001	Resolution 2		Ticket Type A
03/03/2009	Jonathan Jenkins	Circle Photography	412313456		Replaced the hard di		Ticket Type A
03/03/2009	Bill Willis	Willis Enterprises	545233156	C-CH-1005	Resolution 1		Ticket Type A
03/03/2009	Bill Willis	Willis Enterprises	545233156		Ink cartridges replace		Ticket Type A
03/03/2009			545689741		Upgrade software to		Ticket Type A
03/03/2009			545689741	C-CH-1002	Upgraded to ACTI 20		Ticket Type A
03/10/2009			54612323	C-CH-1008	Resolution 1		Ticket Type A
03/10/2009			54612323		Resolution 1		Ticket Type A
03/03/2009				C-CH-1004	Resolution 1		Ticket Type B
03/03/2009					Replaced 10 head set		Ticket Type B
03/03/2009					Resolution 2		Ticket Type B
03/03/2009	Rudy Nordstrom	Jake Flakes I			Resolution 1		Ticket Type A

Tips: Using MS-Word merge always close MS-Word using file close to avoid the Normal.dot message warning.

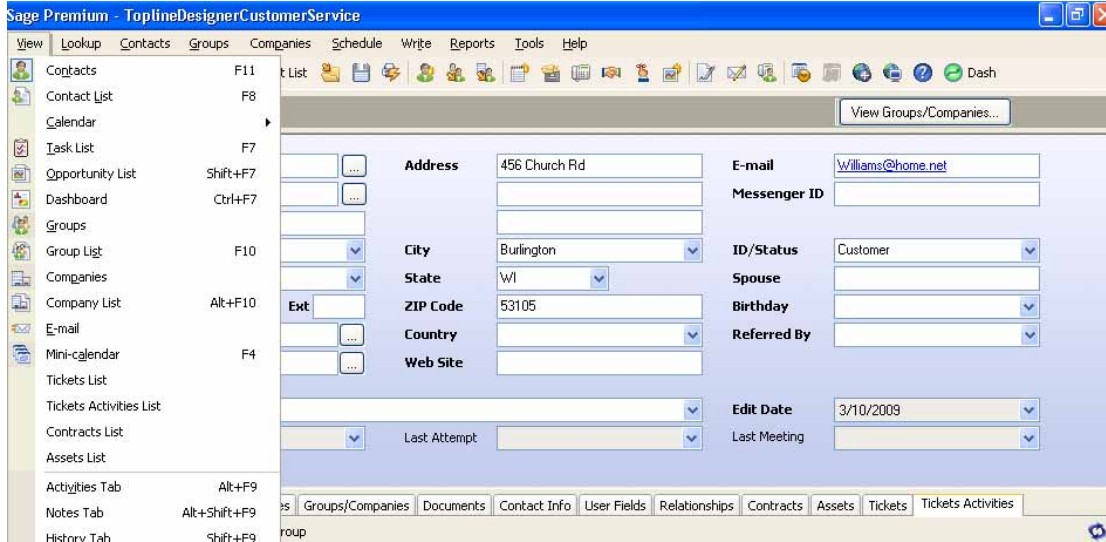
See also

- [Adding / Deleting Entities](#)
- [Managing Display Columns](#)
- [Grouping / Filtering](#)
- [Replace Values](#)
- [Exporting to Excel](#)

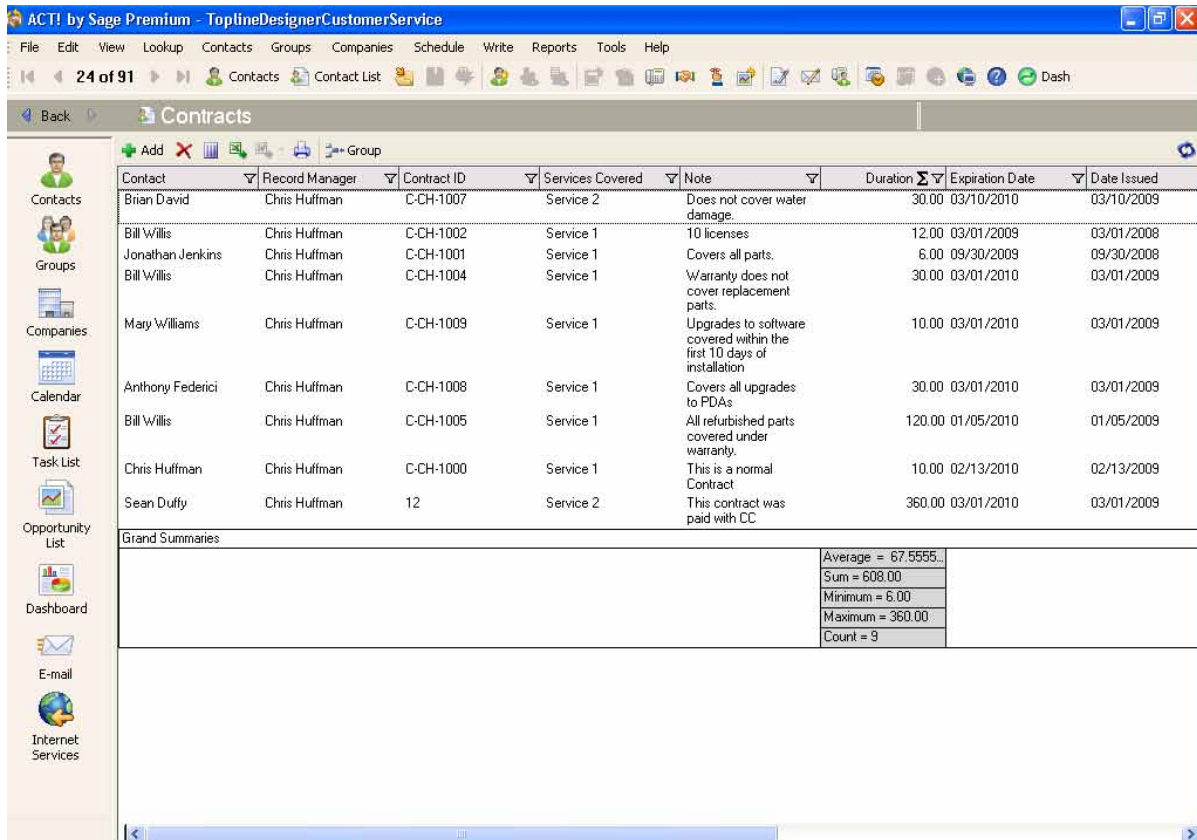
Home > End User Functions > Using List View

## Using the List View

The List View in TopLine Designer allows you to see all the fields that are available in the sub-entity or Tab. In this example below, we selected the Contract List View from the drop down menu View. Note that using list view is no different then using Designer Tabs, only now do you see all records for that sub-entity in the database. All the controls for Adding/Deleting Entries are the same, Displaying Columns, Grouping and Filtering as well as Exporting to Excel and using Merge to Word.



Selecting Contract Lists will show the list below:

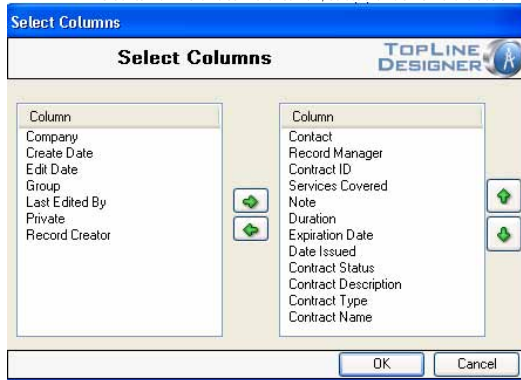


This section is identical to [Using Designer Tabs](#) please refer to that section

a. [Adding](#)  
Click Add to create a new items to the list. You will be prompted to a new blank form. It is preferable to do so from the contact, company or group so as to automatically pre-populate the corresponding fields.

b. [Deleting](#)  
Select any row and click on the delete icon (Red X)

c. [Choosing Columns](#)  
In order to view more fields in the list view, select the field from the left column and bring to the right. (See Below)



d. [Exporting to Excel](#)

Exporting to Excel sends all the visible rows and columns to excel. If you have applied a group based on a field, MS-Excel will show those results as well. The same is true if you applied a filter: only the filtered data will show in the list view.

Contact	Record Manager	Contract ID	Services Covered	Note	Duration	Expiration Date	Date Issued
Brian David	Chris Huffman	C-CH-1007	Service 2	Does not cover water damage.	30.00	03/10/2010	03/10/2009
Bill Willis	Chris Huffman	C-CH-1004	Service 1	Warranty does not cover replacement parts.	30.00	03/01/2010	03/01/2009
Anthony Federici	Chris Huffman	C-CH-1008	Service 1	Covers all upgrades to PDAs	30.00	03/01/2010	03/01/2009

e. [Merging to Word](#) - Please refer to the MS-Word Mail Merge section for more details.

1. Merge an existing template to Word
2. Create a new template
3. Edit an existing template
4. Mail Merge multiple rows to an embedded grid
5. Select multiple record rows and mail merge to separate documents the content of each record

f. [Printing](#)  
Select the print icon and print a list directly to your printer.

g. [Grouping](#)  
Click on group and Drag a field to the space created between the the icons and the list - Refer to the Grouping and Filtering section under Using Designer Tabs.



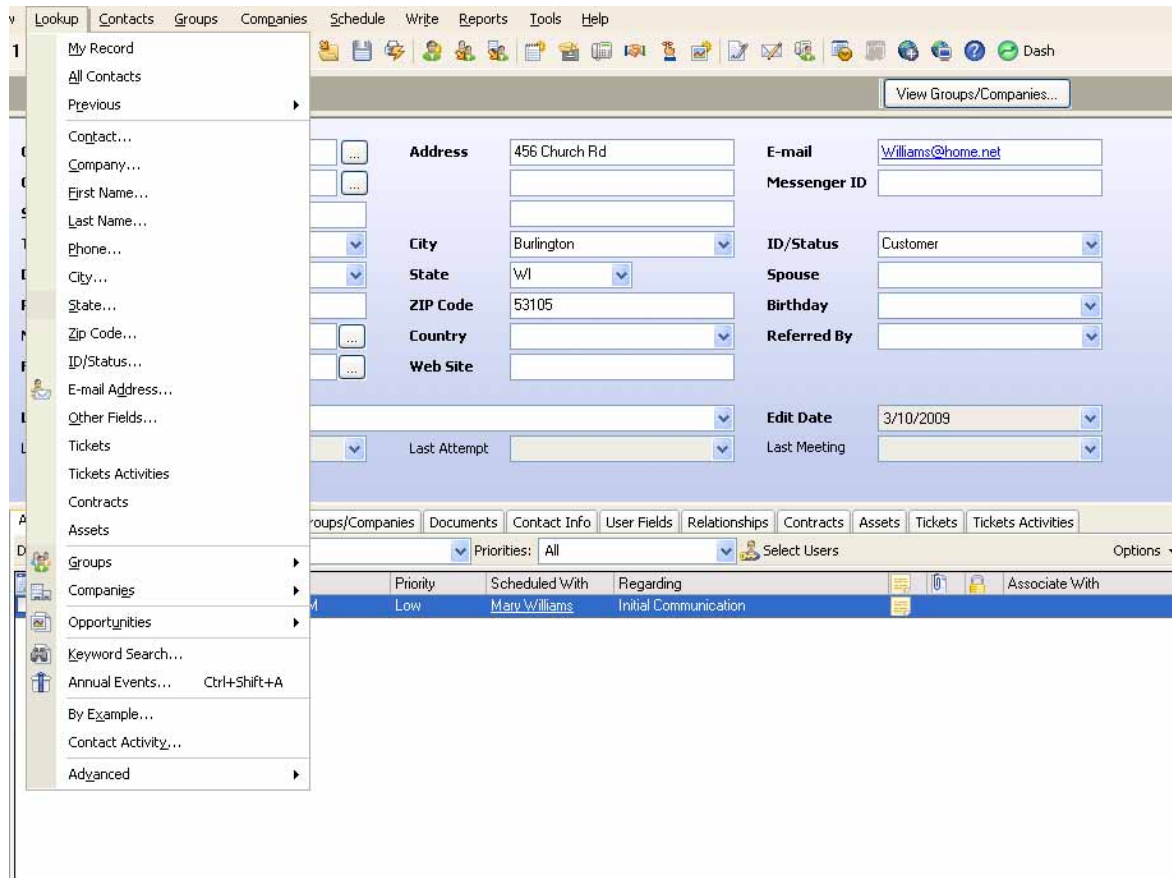
See also

[Using Designer Tabs](#)  
[Using Lookups](#)

Home > End User Functions > Using Lookups

## Look-ups

If you have checked the custom table to be viewable in TopLine Designer, you will be able to go to the Look-up menu.



You can select the custom table name and the associate custom table fields to look-up the contents and return the resulting contacts, companies or groups.

This is a unique feature in TopLine Designer and the Look-up is not just limited to contacts (see below the 5 options available: Contacts, Companies, Groups, Contacts At Companies, Contacts Within Groups).

### 1. Contacts

This return the Look-up we are all familiar to when we look-up a contact field in ACT!



the results are Contacts

Contact List									
View Groups/Companies...									
Look for: <input type="text"/> <input type="checkbox"/> Edit Mode <input type="checkbox"/> Tag Mode Tag All Untag All Lookup Selected Omit Selected Options ▾									
Company	Contact	Phone	Extension	Title	Address 1	Address 2	City	State	
<a href="#">Average Grocery</a>	Mary Williams	(262) 555-5555			456 Church Rd		Burlington	WI	
<a href="#">Mix Alliance</a>	Brian David	(225) 555-2154		Administrative Assist	1802 Sandstorm Ave	Suite JS16	Baton Rouge	LA	
<a href="#">Willis Enterprises</a>	Bill Willis	(480) 555-1232		Owner	1920 Rocky Mounta		Scottsdale	AZ	
<a href="#">CH Gourmet Gifts</a>	Chris Huffman	(212) 555-1758		Sales Manager	13 East 54th St.		New York	NY	

2. Companies

This Returns the Look-up we are familiar to when we look-up Companies in ACT!, e.g.

the results are Companies

Company List											
View Groups/Companies...											
Look for: <input type="text"/> <input type="checkbox"/> Edit Mode <input type="checkbox"/> Include Divisions Options ▾											
Company	Phone	Address 1	Address 2	City	State	ZIP Code	Web Site	Industry	ID/Status	Reco	
CH Gourmet Gifts	(212) 555-2485	13 East 54th St.		New York	NY	10008	www.chgourmetgifts				Chris
Circle Photography	(214) 555-4652	2256 Circle Lane	Suite 4	Dallas	TX	75214	www.circlephoto6.c		Customer		Chris
MiniSoft		1234 E. 1st St.		Scottsdale	AZ	85258	www.tonyfed.com		Customer		Allisor
Mix Alliance	(225) 555-4512	1802 Sandstorm Ave.	Suite JS16	Baton Rouge	LA	70831	www.mixalliance.cor		Customer		Allisor
Willis Enterprises	(480) 555-2456	1920 Rocky Mountain W.		Scottsdale	AZ	85258	www.willis.biz		Customer		Chris

3. Groups

This Returns any Group records link to the search criteria, the results are groups

4. Contacts At Companies

This Returns all the Contacts at the Companies linked to our search within the custom table,

the results are Contacts

Contact List										View Groups/Companies...
Look for:		<input type="checkbox"/> Edit Mode	<input type="checkbox"/> Tag Mode	Tag All	Untag All	Lookup Selected	Omit Selected	Options ▾		
	Company	Contact	Phone	Extension	Title	Address 1	Address 2	City	State	
	<a href="#">CH Gourmet Gifts</a>	Allison Mikola	(212) 555-8421		Sales Representativ	13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Betty Browser	(480) 555-2457		Administrative Assist	13 East 54th St.		New York	NY	
	<a href="#">Willis Enterprises</a>	Bill Willis	(480) 555-1232		Owner	1920 Rocky Mounte		Scottsdale	AZ	
	<a href="#">Mix Alliance</a>	Brian David	(225) 555-2154		Administrative Assist	1802 Sandstorm Aw	Suite JS16	Baton Rouge	LA	
	<a href="#">CH Gourmet Gifts</a>	Cecil Carter	(212) 555-4444		Public Relations Mar	13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Chris Huffman	(212) 555-1758		Sales Manager	13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Ernst Anderson	(415) 555-2231		Sales Representativ	13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Fred Fenderline	(212) 555-8487		Production Manager	13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Fred Smith	(415) 555-2231			13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Jane Chan	(212) 555-4447		Creative Consultant	13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Joe Marrietta	(480) 555-2457			13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Jonathan Sommer	(212) 555-8403		Marketing Manager	13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Juliette Rosseux	(212) 555-7321		CFD	13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Kacie Hare	(212) 555-1758		Assistant Engineer	198 Sparling Drive		New York	NY	
	<a href="#">Average Grocery</a>	Mary Williams	(262) 555-5555			456 Church Rd		Burlington	WI	
	<a href="#">CH Gourmet Gifts</a>	Melissa Pearce	(212) 555-8431		Assistant	13 East 54th St.		New York	NY	
	<a href="#">CH Gourmet Gifts</a>	Sarah Whiting	(212) 555-2221		Sales Representativ	13 East 54th St.		New York	NY	

#### 5. Contacts Within Groups

This Returns all the Contacts within all Groups linked to our search, the results are contacts belonging to these groups

#### See also

[Using Designer Tabs](#)  
[Using List View](#)

Home > Windows vs Web Functionality

## Windows versus Web Functionality

The following functionality is available with TopLine Designer on ACT! Premium and available with TopLine Designer on ACT! for Web.

1. You can view a total of 10 Tabs at the contact level, company level, group level
2. You can arrange the columns to view any field in the custom table
3. You can double click and view the content of each Tab as it was designed in the Windows client on the server
4. You can sort by any field
5. You can edit and save the new content of almost all the fields in the custom table
6. You can add or delete a row or record under any Tab or in the List view
7. You can see an embedded table in the screen view and drill down on the content of the sub-custom child table
8. You can generate a list of each custom table in a List view and further arrange columns, sort by field and drill down from the list view, delete or add new records

Below is an example of a comparison for a Project Module in Windows and in ACT! for Web:

Windows:

Action Description	Project Activity	Projects	Cost	Invoice
Check for Quality	3/1/2009 4:00:00 PM	Special ProjectA	\$2,000.00	Not Invoiced
Project Review	1/27/2009 11:00:00 A	Special ProjectA	\$3,000.00	Not Invoiced

Web:

Projects - Windows Internet Explorer

http://localhost/APFW/designer/SubEntityForm.aspx?Table=PROJE

### Projects

Project Name: Special ProjectA      Priority: A

Description: Splendid opp      Status: Open

Start Date: 1/1/2009      Estimated Duration: 5.00

Due Date: 1/31/2009      Cumulative Duration: 0.00

Completion Date: 1/27/2009      Estimated Cost: 20000.00

Group: AsiaPac Employees      Cumulative Cost: 5000.00

Notes: Please get all the facts during the analysis

Company: CH TechONE      Contact: Thomas Andrews

Opportunity: (Linked Opportunity)

Documents:

Action Items: + X

Record Manager	Projects	Activity Followup	Action Description	Cost
Chris Huffman	Special ProjectA		Project Review	\$3,000.00
Chris Huffman	Special ProjectA		Check for Quality	\$2,000.00

OK      Cancel

Windows:

Contact Detail      View Groups/Companies...

**Business Card**

Contact: Chris Huffman

Company: CH TechONE

Title: CEO

Department: Administration

Salutation: Chris

Phone: (212) 555-2485

Mobile: (212) 555-4784

E-mail: Chris@CHTechONE.com

Last Results:

**Address**

Address 1: 13 East 54th St.

Address 2: Suite 300

City: New York

State/ZIP: NY 10008

Country: United States

Personal E-mail:

Web Site: www.CHTechONE.com

**Status**

ID/Status: Employee

Referred By:

**Latest Activities**

E-mail: 1/10/2006

Call Attempt/Reach: 7/25/2008

Meeting: 4/10/2008

Letter Sent:

Edited On/By: 1/26/2009 Chris Huffman

Activities   Opportunities   History   Notes   Documents   Groups/Companies   Projects   Action Items   Project Library

+ Add   X   -   Group

Record Manager	Cumulative Durati	Start Date	Notes	Description	Priority	Completion Date	Opportunity
Chris Huffman	0.00	01/01/2009	Please get all the facts during the analysis	Splendid opp	A	01/27/2009	Dallas Office L

Web:

The screenshot displays the ACT! Premium For Web interface. The top navigation bar includes menus for View, Lookup, Contacts, Groups, Companies, Schedule, Opportunities, Write, Reports, Tools, and Help. The main content area is titled "Contact Detail" and shows the profile for Chris Huffman, CEO of CH TechONE. The contact information is organized into sections: Business Card (Contact, Company, Title, Department, Salutation, Phone, Mobile, E-mail, Last Results), Address (Address 1, Address 2, City, State/ZIP, Country), Status (ID/Status, Referred By), and Latest Activities (E-mail, Call Attempt/Reach, Meeting, Letter Sent, Edited On/By). Below the contact details is a table of activities.

Project Name	Start Date	Priority	Create Date	Notes	Status
Special ProjectA	1/1/2009	A	1/23/2009 10:03:38 PM	Please get all the fac	Open

The following features are not available on the Web: Create a look-up, Grouping, Filtering, Exporting, Replacing Values, Merging to Word, Importing Data, as well as managing the tables such as table creation, field creation and security assignment, scripting in ACT! for web does not apply, as well as using fields to link activities, opportunities, or track documents using a URL.

#### See also

[Welcome](#)  
[Installation](#)  
[Administrator Functions](#)  
[End User Functions](#)  
[Integration with TopLine Dash](#)  
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Home > Integration with TopLine Dash

## TopLine Dash Integration

TopLine Dash is the easiest way to create a powerful report in ACT!. In order to be able to leverage this interactive reporting tool you must first own a license of TopLine Dash. You may already have purchased a license which is installed on your computer. If that is the case, make sure you run version 7 and above. In this example, we will show you version 7.5 which is soon to be released (May 2009). If you purchased TopLine Designer Plus instead of TopLine Designer, you would have received a license for TopLine Dash which runs only in ACT! for Windows.

Because each Subentity in ACT! can be created by an ACT! Administrator, we do not have specific dashboard templates available. Instead, you have to create your own.

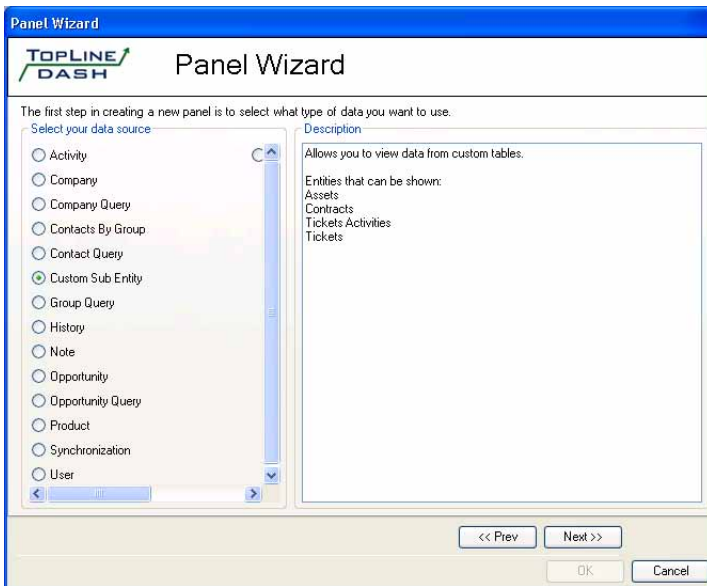
First Click on TopLine Dash Icon in ACT! (Top Right)



1. Click on the New Dashboard Icon.



2. Select Custom Sub-Entity 3. Now select which custom table to report.



Once you have selected the correct custom table you can create 2 filters: one for a date field and one from a general field (all other fields can be used as filters inside any ultralist view)

These 2 filters will be used and reflected in the graphical views generated in the TopLine Dash.



**Custom Table Dashboard List** (14) - 2/13/2009 - 3/15/2009

Asset Name	Asset Location	Asset Status	Asset Descripti	Asset Value	Asset Serial N	Asset Type	Note	Document
Apple	Location 1	Asset Status 1	I-Phone	500.00	54612323	Premium	Includes free	file://C:\Documer
Asset 1	Location 1	Asset Status 2	Hand-Held	356.00	23455645	Standard	Software upgrade	file://C:\Documer
Asset 1	Location 1	Asset Status 1	PC	500.00	1234	Type A	This PC to be	file://C:\Documer
Asset 2	Location 2	Asset Status 2	Screen	500.00	230546	Type A	This Screen is	file://C:\Documer
Asset 2	Location 2	Asset Status 2	Printer		1010101	Type A	This printer is	file://C:\Documer
Cisco	Location 1	Asset Status 2	Phone - Head	250.00	7895213	Standard	Replacement	file://C:\Documer
Cisco	Location 1	Asset Status 1	IP Phone System	2500.00	123145648	Standard	25 total phone	file://C:\Documer
Dell	Location 2	Asset Status 1	Desktop Computer	635.69	897546123	Standard	Software	file://C:\Documer
Dell	Location 1	Asset Status 2	Laptop	1500.00	412313456	Type A	Issues with the	file://C:\Documer
Samsung	Location 1	Asset Status 1	HD Screen	600.00	1398456	Premium	Under 60 day	file://C:\Documer
Samsung	Location 1	Asset Status 1	Printer	332.00	545233156	Standard	All supplies must	file://C:\Documer
Samsung	Location 2	Asset Status 1	Digital Sound	2500.00	12122656	Premium	30 day warranty	file://C:\Documer
Software	Location 2	Asset Status 2	ACTIT 2008	3356.00	545689741	Premium	ACTIT Platinum	file://C:\Documer
Xerox	Location 1	Asset Status 1	Phaser Printer	5000.00	98756421	Premium	All supplies must	file://C:\Documer

Grand Summaries

Average = 1425.36...

Sum = 18529.69

Minimum = 250.00

Maximum = 5000.00

Count = 14

Next you can filter from within the list view. After you select to view the ultralist, using the filter icon next to each field, you can now filter your dashboard for any fields in the view. Note the Sigma Letter allows you to add statistics to the view below.

While Filters can be saved when you save a new dashboard, stats are not. You can if you want to export your dashboard to excel.

**Enter filter criteria for Asset Value**

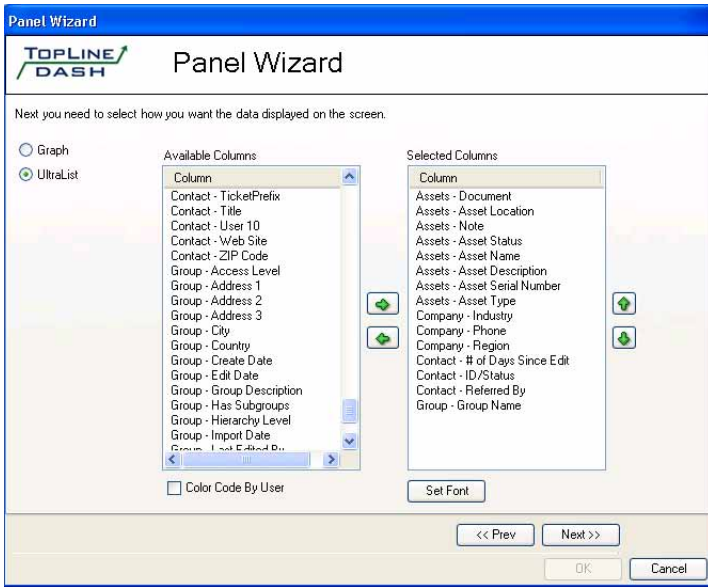
Operator: < Less than 2500.00

Or conditions: >= Greater than or equal to 250.00

Buttons: Add a condition, Delete Condition, OK, Cancel

Footer: [Asset Value] < '2500.00' AND [Asset Value] >= '250.00'

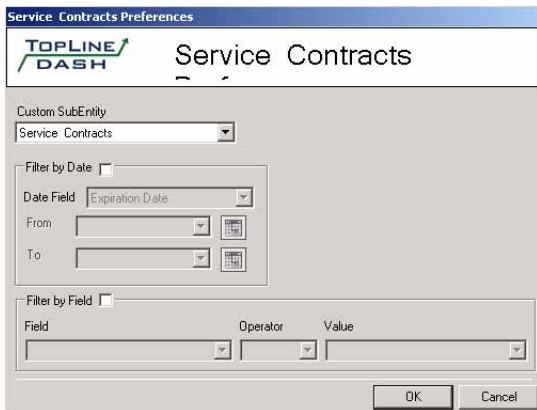
You can choose, in the dashboard, from any fields in the custom entity (Assets in this example) or the contact, company or group fields. This feature makes the dashboard very powerful as you can view any parent custom tables if there was one above asset.



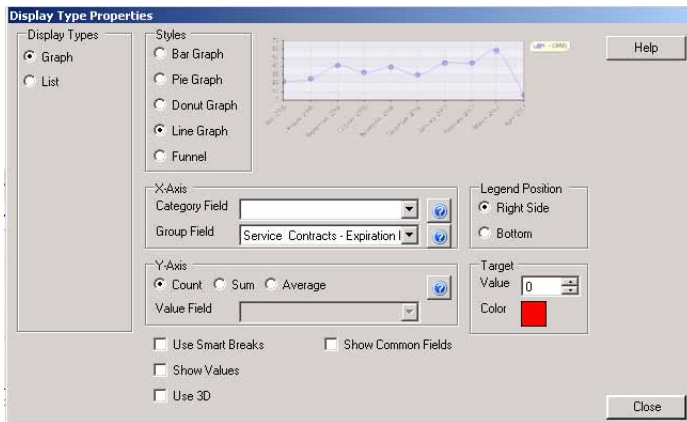
Below are dashboard created for Custom Entities:

Expiration Date	Total Duration	Service	Description	Contact	Company	ID/Status	Referred By	Memo
9/30/2008	1	Premier	Consulting Prepaid	Ivan A. Stekopick	Swing Software	Customer	Website	Customer wants it in 30 days
6/9/2009	3	Premier	8 hours	Jonathan Jenkins	Circle Photography	Customer/Friend	E-mail Campaign	Good Guy to do business
4/28/2009	7.5	Premier	Support - four hours	Paul Henderson	Verge Records	Prospect	Advertisement	Need lots of hand holding
4/28/2009	2	Standard	Support Pack	Colleen McCarthy	Ace Pet Store Franchises	Customer		Happy to have them
4/28/2009	0.25	Premier	Support	Benny Lender	Best Lender Financing	Customer		User help type support
4/28/2009	17	Standard	Support - 4 hrs.	Kristi Elmendorf	Black Forest Baking	Prospect/Vendor		Always do Gotomeeting
5/30/2009	8	Standard	Service of Cartridge	Chris Hullman	CH TechONE	Employee		Ready to be serviced
7/2/2009	2	Premier	Support Contr.	Sarah Whiting	CH TechONE	Employee		
4/28/2009	0.5	Premier	Support - 4 hrs.	Ashley Allen	Yellow Jesses Rikes	Customer		This contract was found

Below are the filters Setting for the two panels:



Below is the filter.



Please review the TopLine Dash Help file for further assistance.

### See also

- [Welcome](#)
- [Installation](#)
- [Administrator Functions](#)
- [End User Functions](#)
- [Windows vs Web Functionality](#)
- [FAQ](#)
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[Purchase and Licensing FAQ](#)



[Installation FAQ](#)

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Home > FAQ > Purchase and Licensing FAQ

## FAQ

1. I need multiple licenses of the TopLine Dash and TopLine Designer. What are my quantity discounts?

### Pricing

TopLine Designer (Win/Web).....	\$99 per user
Qty of 5-19.....	\$89 per user
Qty of 20-49.....	\$79 per user
Qty of 50+.....	\$69 per user
 TopLine Designer Plus.....	 \$199 per user
<i>includes TopLine Dash Manager</i>	
Qty of 5+.....	\$149 per user
 TopLine Server Suite.....	 \$299 per user
<i>includes TopLine Designer,</i>	
<i>Dash Manager and Alerts Pro</i>	

2. Do I need to buy a license for ACT! for Web?

TopLine Designer comes with a license for Windows and a license for the Web for that same user. Each user needs a license.

While TopLine Designer for ACT! for Windows will work on multiple databases, a license for ACT! for Web can only work on one database at a time. You must use the Web License Manager in the Start menu to free up or set-up the use of TopLine Designer ACT! for Web for a user.

3. How do I order TopLine Add-ons

a. Order on the TopLine eStore: <https://store.toplineresults.com/>

Note that the eStore only allows for one level of quantity discounts, therefore, for larger quantities (20 and above) you should request our order form.

b. You can download our order form from [https://store.toplineresults.com/addons\\_orderform.pdf](https://store.toplineresults.com/addons_orderform.pdf)

and fax it to us at the number on the form.

c. If you are an ACC you may qualify as a reseller and receive a coupon for your orders.

d. Call 800-880-1960 to request a quote

4. What is the difference between TopLine Designer and TopLine Designer Plus?

TopLine Designer Plus includes a license of TopLine Dash Manager and TopLine Designer.

5. Can I upgrade from TopLine Designer 2.0 to TopLine Designer 3.0

Yes and it is free! Go to our Download area: <http://www.toplineresults.com/products/downloads.htm>

6. Do I need to buy an Admin version of TopLine Designer?

No, there is not a TopLine Designer Admin Version or runtime version. When you buy TopLine Designer, you receive the license for a user alongside an administrator user included. An ACT! Administrator or Manager will have access to the TopLine Designer Administration area. A standard user will still need a license to view the tables, but will not be able to access the admin area also called TopLine Entity Manager area.

See also

[Installation FAQ](#)

Home > FAQ > Installation FAQ

## TopLine Designer

1. Where do I download the latest version of TopLine Add-ons?

Go to <http://www.toplineresults.com/products/downloads.htm>

2. Should I uninstall before I upgrade?

It is recommended to uninstall any previous version of TopLine add-ons prior to upgrade.

3. If I uninstall TopLine Designer, will it affect the data in the table?

No

4. If I uninstall TopLine Dash, will I lose my dashboard?

Version 5 and below: Yes

Version 6 or 7: No

5. How do I get support for TopLine add-ons:

TopLine Designer does come with numerous free videos available from the Website.

TopLine Designer provides with a blog: <http://blog.toplineresults.com/>

TopLine Designer provides an on line helpfile.

TopLine Designer also provides a 30-day fully functional trial version.

6. To guarantee a proper installation, it is best to get professional help from your ACT! CC.

ACT! CC's are experts at ACT! Database Development and can help your company make a leap in performance with ACT!

7. If you just purchased TopLine Add-ons within 30-days directly from TopLine please email [support@toplineresults.com](mailto:support@toplineresults.com).

If you do not have an ACT! CC, or do not know, please contact TopLine Results.

### See also

[Purchase and Licensing FAQ](#)

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Home > Videos > User Videos

## User Video

Please refer to our videos for a quick review: <http://www.toplineresults.com/products/toplinedesigner/videos.htm>

### See also

[Advanced Webinar Videos](#)

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## ACT CC Videos

Please refer to our Webinar videos for advanced examples of TopLine Designer integration and administration

[Introducing TopLine Designer v2.0](#)  
[June 28, 2008](#)

[Effective Database Designs using TopLine Designer.](#)  
[February 10, 2009](#)

[Schema and Data Imports with TopLine Designer](#)  
[February 17, 2009](#)

[TopLine Designer Scripting](#)  
[February 24, 2009](#)

[TopLine Designer : A closer look at Projects and Customer Service](#)  
[March 3, 2009](#)

[Powerful Reporting on Custom Tables](#)  
[March 10, 2009](#)

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TopLineDesigner