Custom Tables

Steven Jackson
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tables4act!

Contents

About this Document

This document is to be used to train technicians and end-users in supporting customers in using the Custom Tables feature of Act!. It includes a description of the new feature, when it will be available, which customers will be able to use it, support boundaries for technicians, and instructions on how to set up Custom Tables and use them.

Prerequisites

In order to complete the exercises successfully, the each technician will require access to the Custom Tables feature. Therefore they will require ONE of the following environments:

- Act! Premium v20 for Web installed locally and the Custom Tables beta version installed.
- Act! Premium v20.1 for Web installed locally.

Exercises

Throughout the training material consistent and relevant examples of Custom Tables will be showcased. Specifically these examples will focus on creating Custom Tables to record **Support Contracts** and **Support Tickets**. It is recommended that as go through the workbook you follow these examples thoroughly and perform the same steps to create them in your own database. The exercises at the end of each section will simply summarise the steps already covered.

Summary of Custom Tables

One of the more common feature requests in Act! is the ability to create new customized sections of the program. The existing sections in the navigation stackbar are obviously extremely useful, but customers also want a way to create their own sections, and have the information in these link to existing entities such as the Contacts section or Companies section. This higher level of customization has been missing from Act! to date, but as of version 20.1 it has been added in under the feature called Custom Tables.

Using this feature the customer will be able to easily create as many additional sections as they like, each with their own tables, fields and layouts, and all without requiring any specialist development knowledge or skills. Some examples of this in use could be an estate agent that creates a table of the various properties they are selling with as many different customized fields as they want, then they could link these properties to any contacts that are interested in them, or a support team could create sections for customer contracts and support tickets, once again easily linking these with the individual contact records they relate to.

It is possible to add a Custom Table as a new option in the navigation stackbar, as well as adding the information as tabs in the Contacts, Groups, Companies and Opportunities sections. Custom Tables can be used within both the desktop and web versions of Act!.

Why Custom Tables?

This initiative came about for number of reasons:

1. Our customers were hitting limitations with the current Act! product, when they needed to manage data outside of what the existing Act! entities deal with.
2. We commonly lose customers whose businesses have grown or changed, where they need a more flexible and bespoke solution from their CRM.
3. Frequently customers would try to customize areas such as Contacts or Opportunities to store data which these aren't really designed to manage. This would lead to some interesting support calls as customers realized the limitations of working this way.
4. Custom tables have always been possible via our SDK, but the requirement for developer knowledge puts this out of the reach of most customers and ACCs.
5. There have also been 3rd party custom table solutions available for many years, but customers don't always trust (or want to pay more for) a solution which we can't support them with.
6. Customers and ACCs have long desired a custom tables solution with a simple UI, which is supported by us!

What Problem does this Solve?

Custom Tables let customers make Act! truly specific to their industry or work practices. They can create new tables integrated into their existing Act! data, allowing them to manage different types of data such as:

- Projects
- Contracts
- Support Tickets
- Property
- Vehicles
- Software licenses
- Loans

Our sales team are commonly asked whether Act! can store data in areas such as these, and now the answer in most cases is yes! Using Custom Tables, customers and ACCs can now build very tailored vertical solutions, keeping track of all of the data they need to manage in their business in one place.

What Industries does this Work For?

Whilst there are no limits to the custom tables and fields you can create, we'll be introducing 10 – 12 'industry templates' with Act! v20.1, allowing customers in specific industries to get a fully customized database within just a few minutes. A list of these will be finalized soon, but is likely to include the following industries:

- Support (managing contracts and tickets)
- Insurance (managing policies and claims)
- Real Estate (managing property, contracts, tenants, landlords etc.)
- Mortgage (managing mortgages…)
- Wealth Management (managing loans, investments, policies etc.)

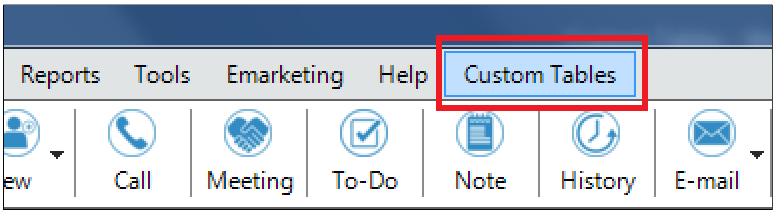
When will this feature become available?

Custom Tables is a new feature that will be added into Act! v20.1 expected currently at the end of February. It will form the major focus of that release.

Managing Tables

NOTE: Only **Administrators** and **Managers** have access to **Manage Custom Tables** shown below. Other users simply do not get the option.

Once you have either installed the beta version (if using Act! v20), or else you have installed Act! v20.1, a new Custom Tables menu will be displayed within the program:

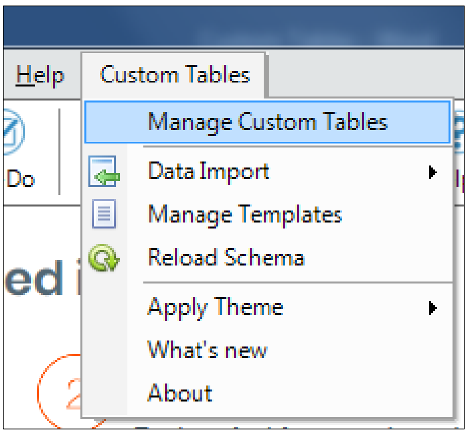


To begin working with this feature, you will first need to create a custom table.

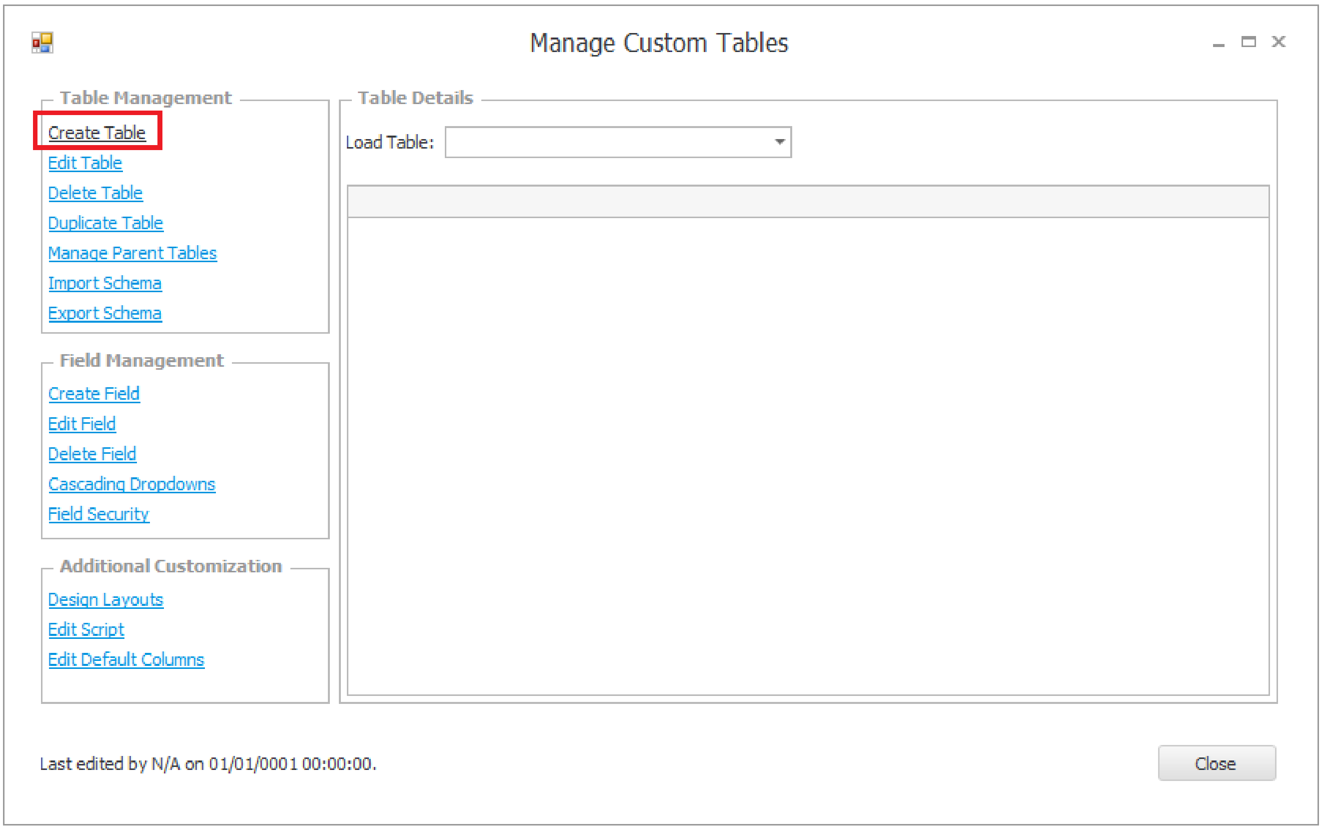
NOTE: At the end of the creation process or when editing an existing table the database will **lock**. It is therefore best practice to make sure all other users log out of the database when working with Custom Tables.

Creating a Table

Click Custom **Tables** > **Manage Custom Tables**.



Under Table Management, click **Create Table**.

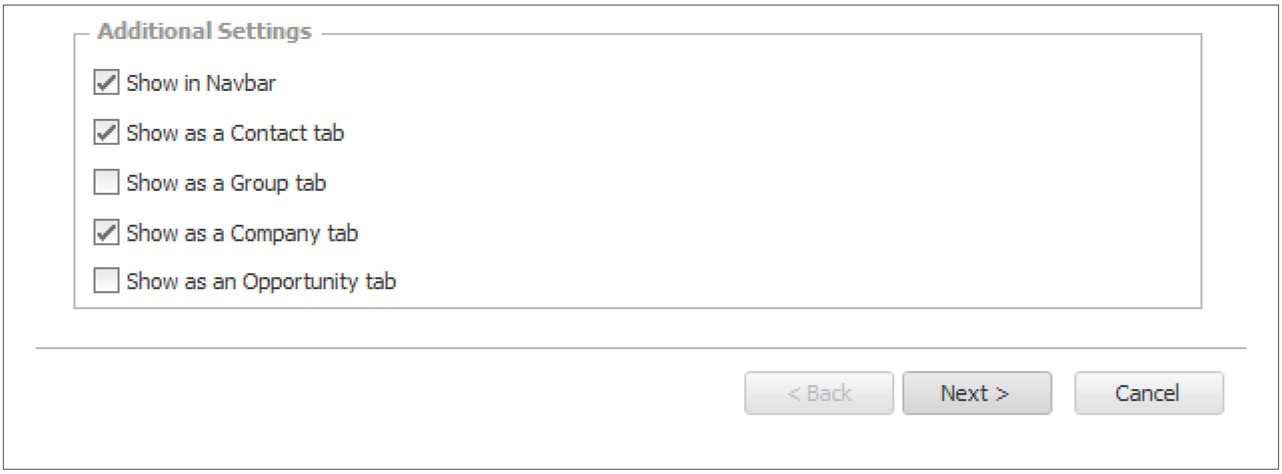


Enter a **Table Name** which is the name the table will be given within SQL. Optionally, you may enter a different **Display Name** which is the name that will actually be displayed within the Act! program. Note that the Display Name can be changed later, however the Table Name cannot.

NOTE: As the **Table Name** will be listed in SQL it follows those naming conventions, i.e. it cannot contain any spaces, it must be less than 32 characters etc. otherwise you will receive an error message when you try to proceed. The **Display Name** however does **not** need to follow these conventions.

You can also choose a **Logo** for the custom table at this point which will be displayed next to the table name in the navigation bar once the table has been created. To make use of this, you will need to **browse** to your own appropriate image file.

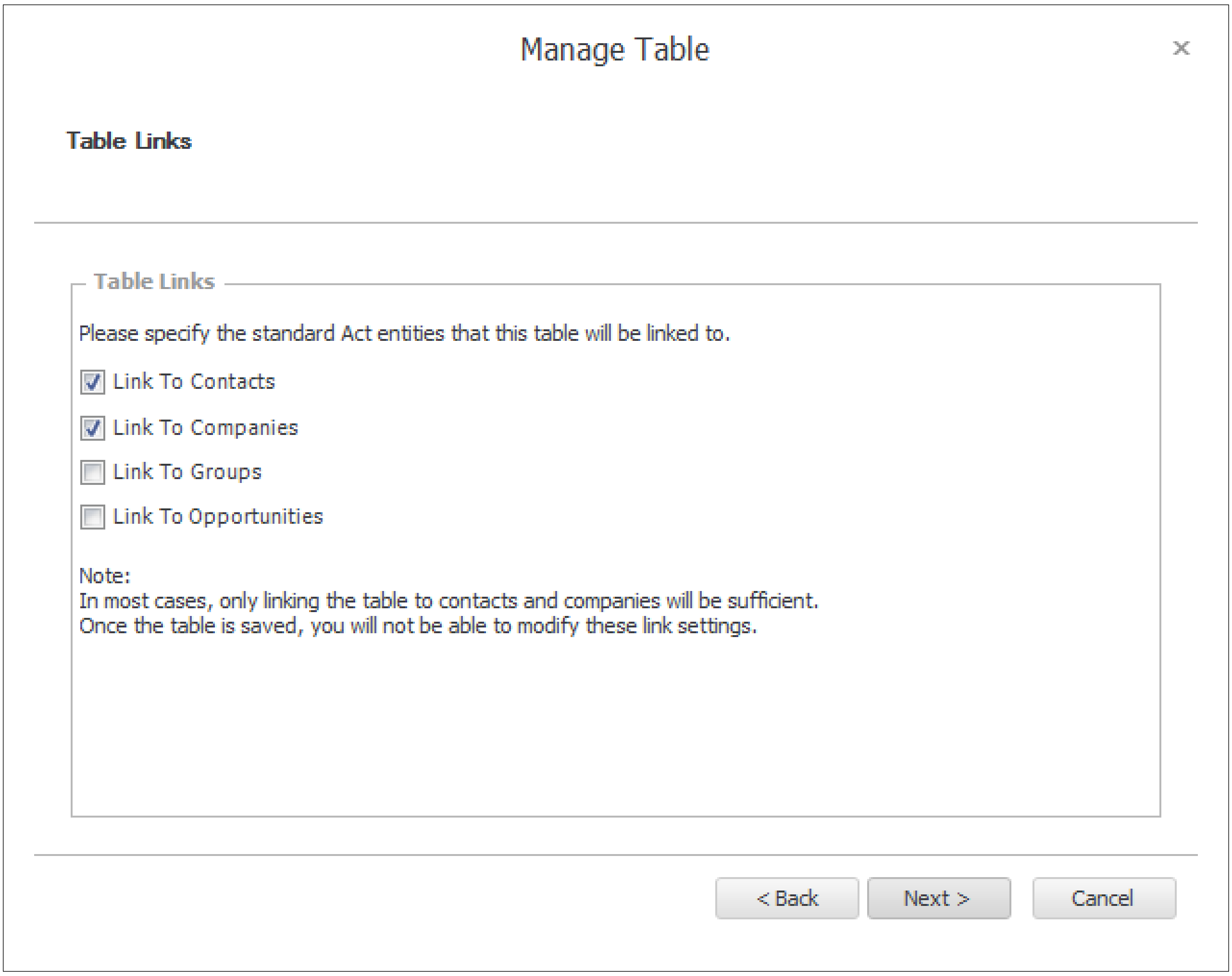
Under **Additional Settings**, select all of the areas where you would like the custom table to display. These options can be amended later if ever needed.



Click **Next**.

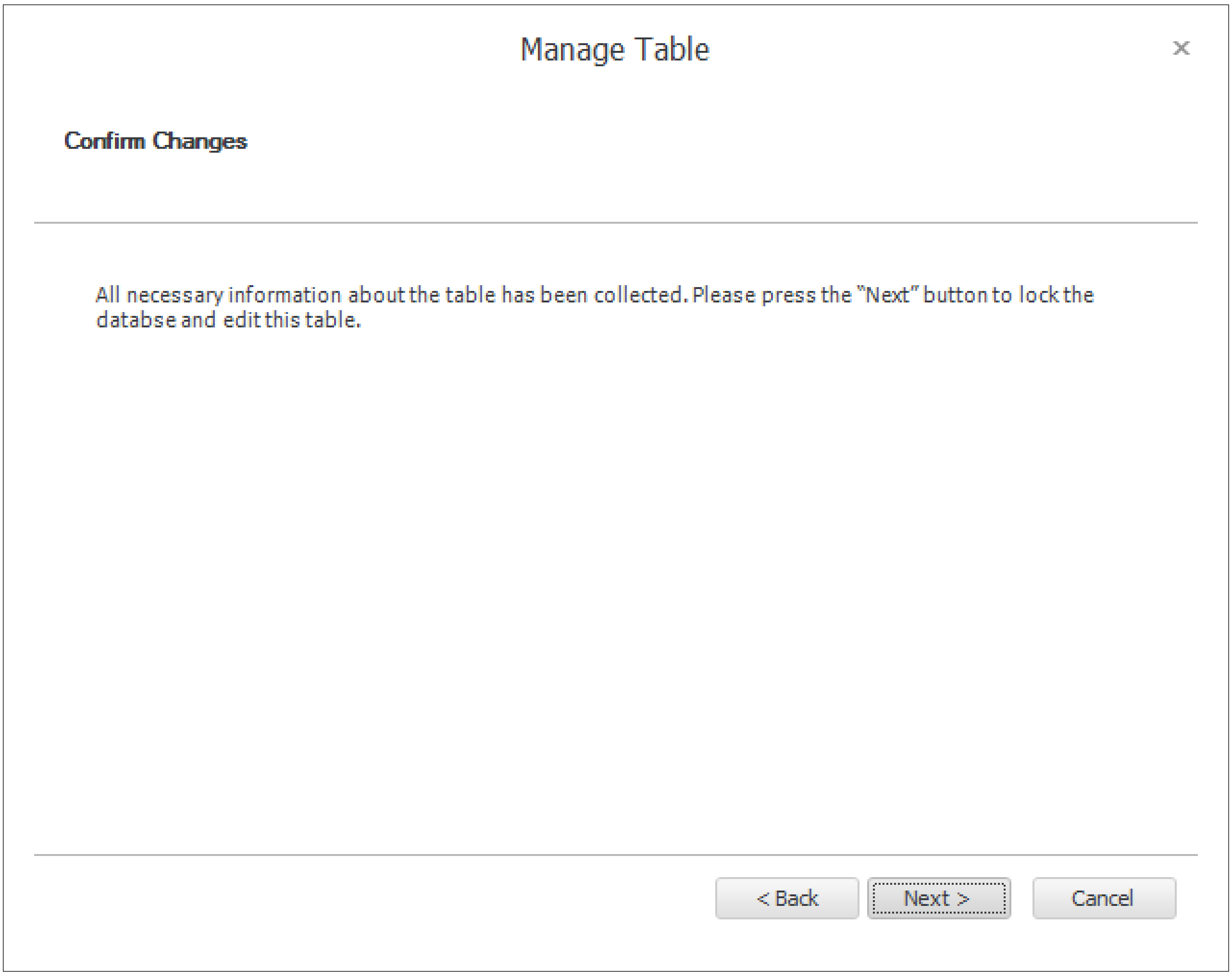
Select the **Act! entities** the table will link to. In most cases Contacts and Companies are sufficient, but note that this selection **CANNOT** be changed later.

<u>NOTE</u>: When choosing your **entities**, you must make sure these match the **Additional Settings** that you chose in the screenshot above. For example, if you had ticked **Show as a Group tab above,** then you would need to make sure so select **Link to Groups** in the screenshot below.

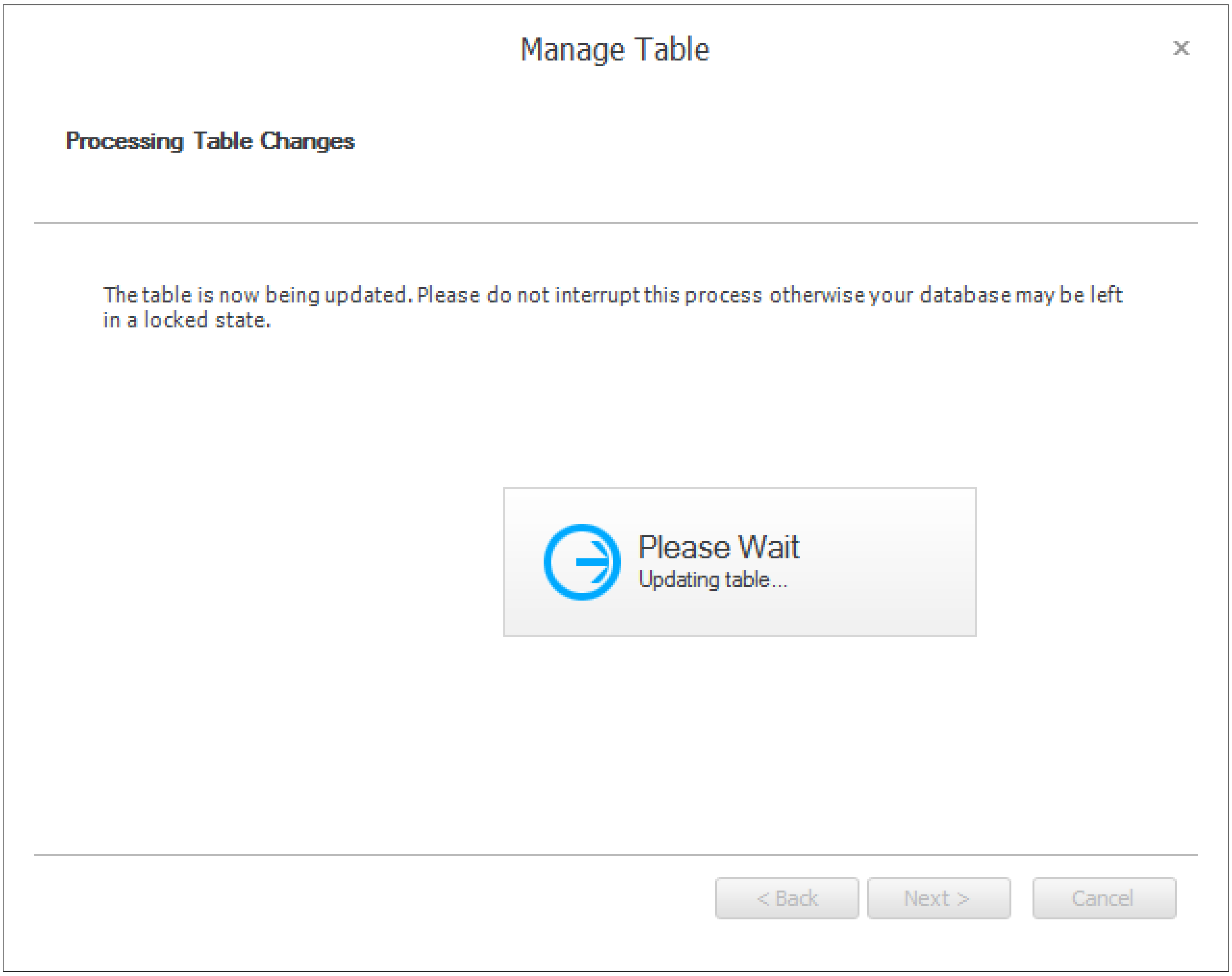


Click **Next** to confirm, and **Next** again to create the table.

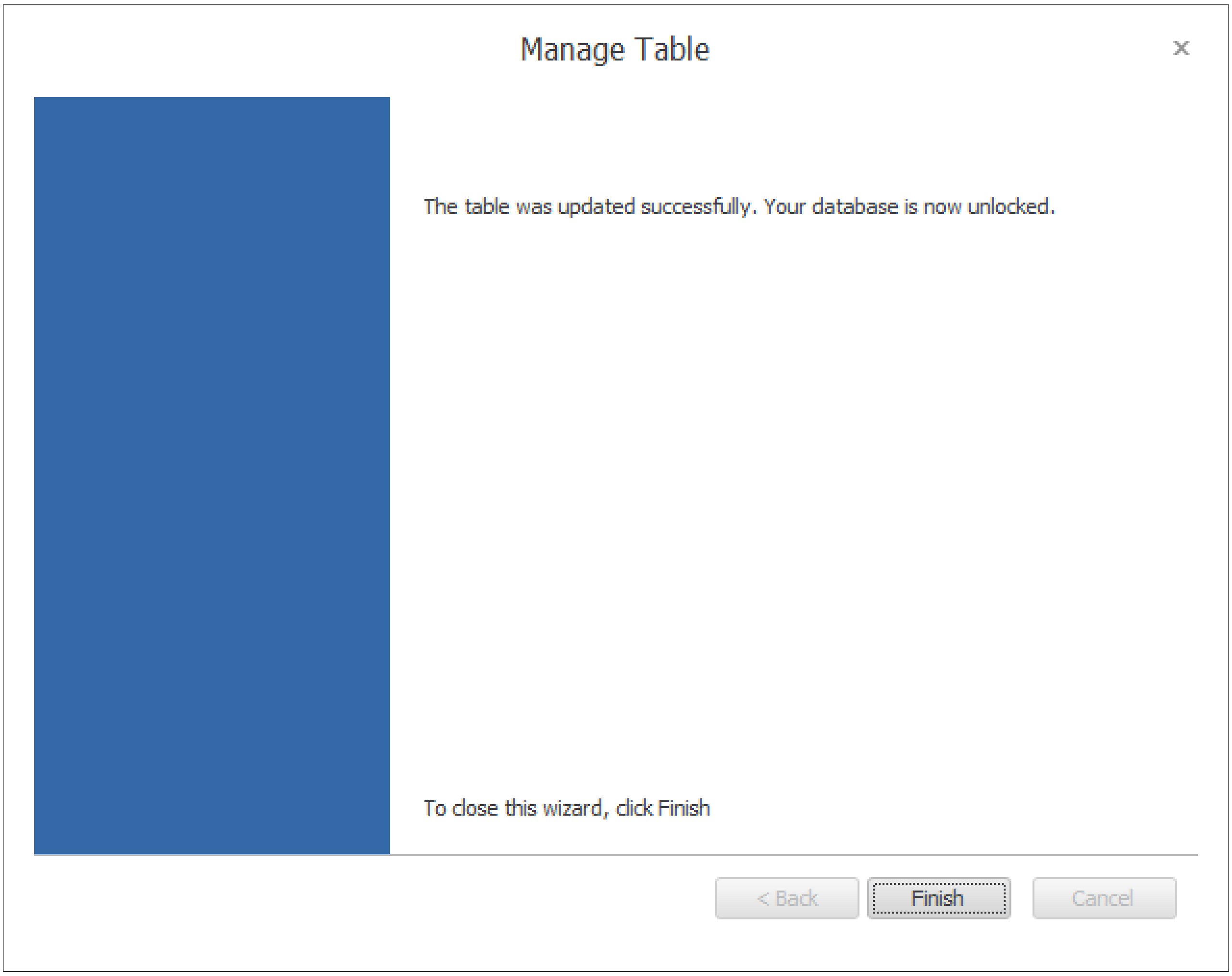
NOTE: As advised in the final screen, the database will be **locked** upon the creation of the table.



The table can take a few minutes to create, and as advised it is best not to interrupt this process.

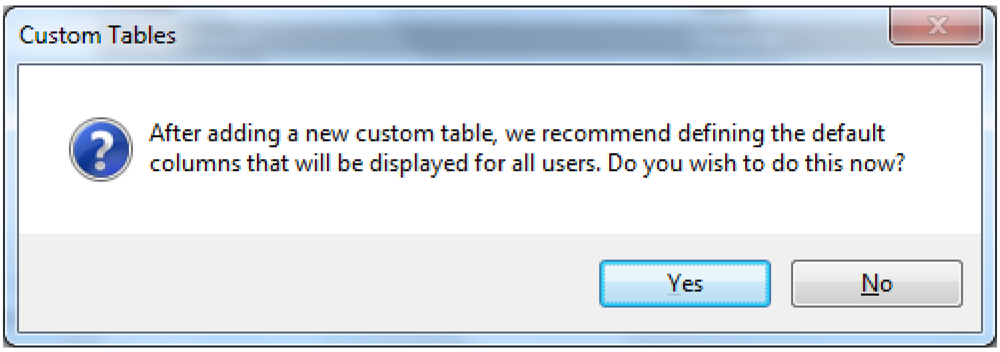


Once the table has been completed successfully, you will receive a confirmation message. Click **Finish** to continue.



Setting Default Columns

After creating the new table, a prompt asking to set default columns will be display.



Here you can select the columns that will be displayed to all users. This list can be accessed again by clicking **Edit Default Columns** on the main Manage Custom Tables dialog.

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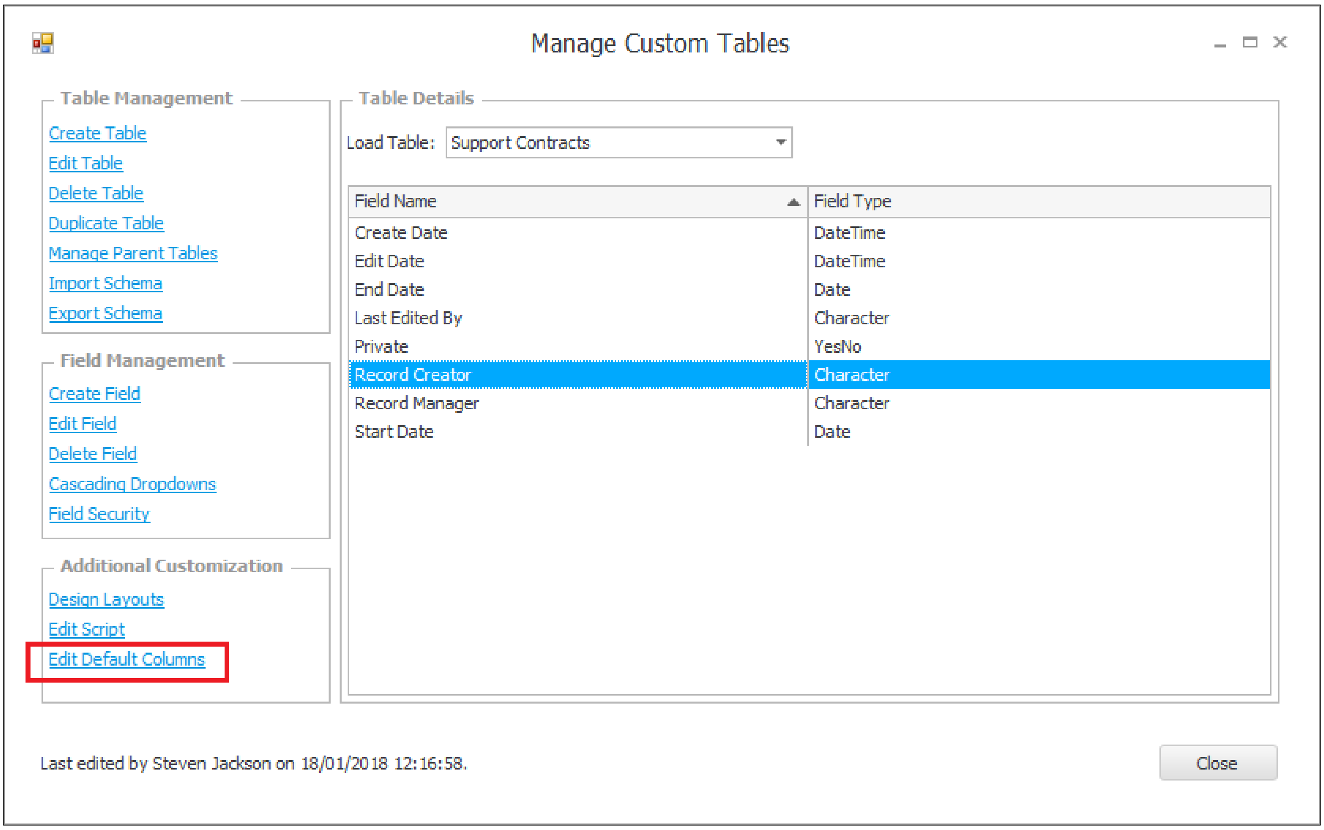
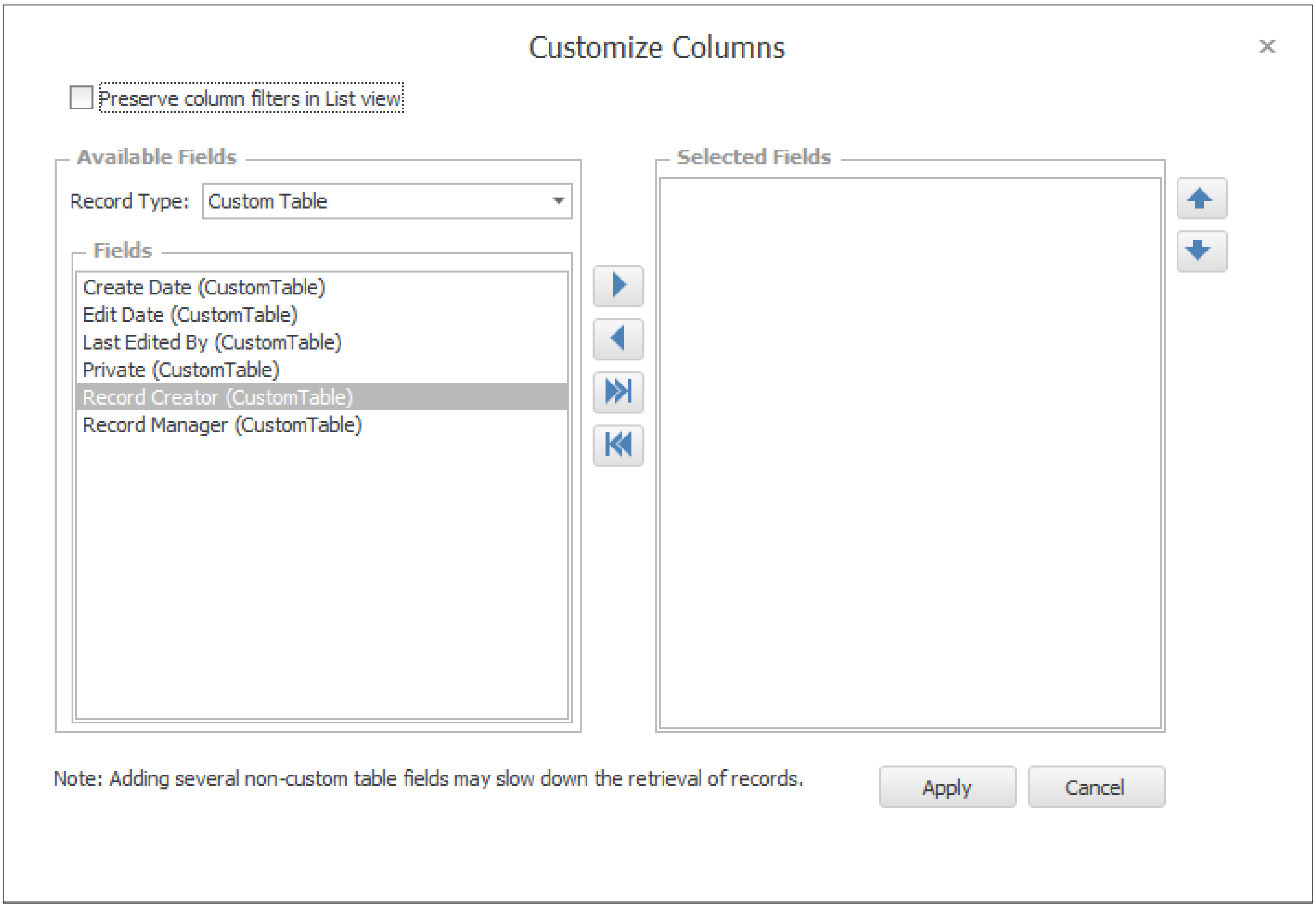


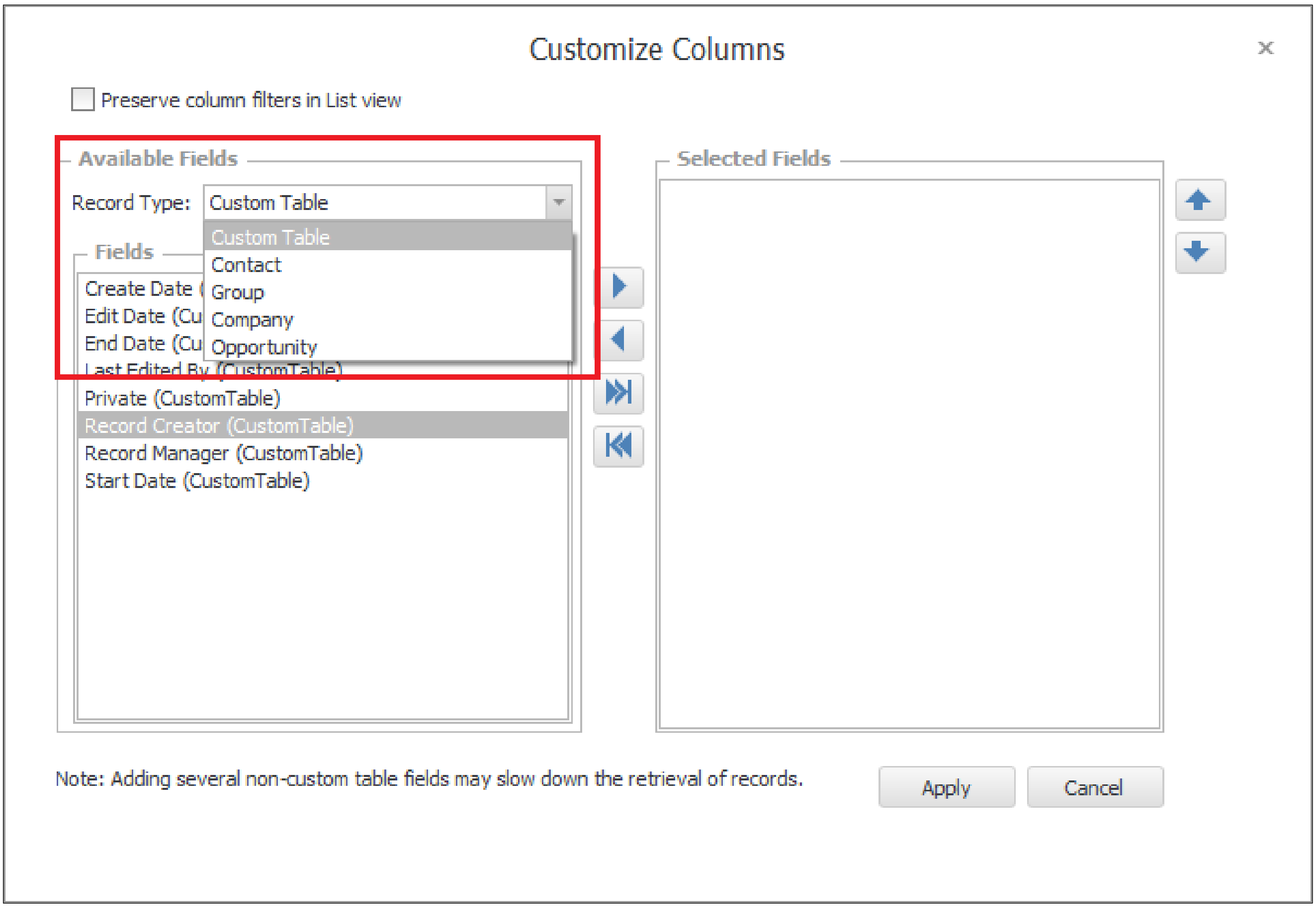
If you choose to edit the columns you will see the following screen.



Whenever a new table is created it comes with the standard fields that you can see in the screenshot above. These fields only exist in the Custom Tables section of Act! (ie. if you navigate to Tools > Define Fields you will **not** see the Custom Tables fields listed).

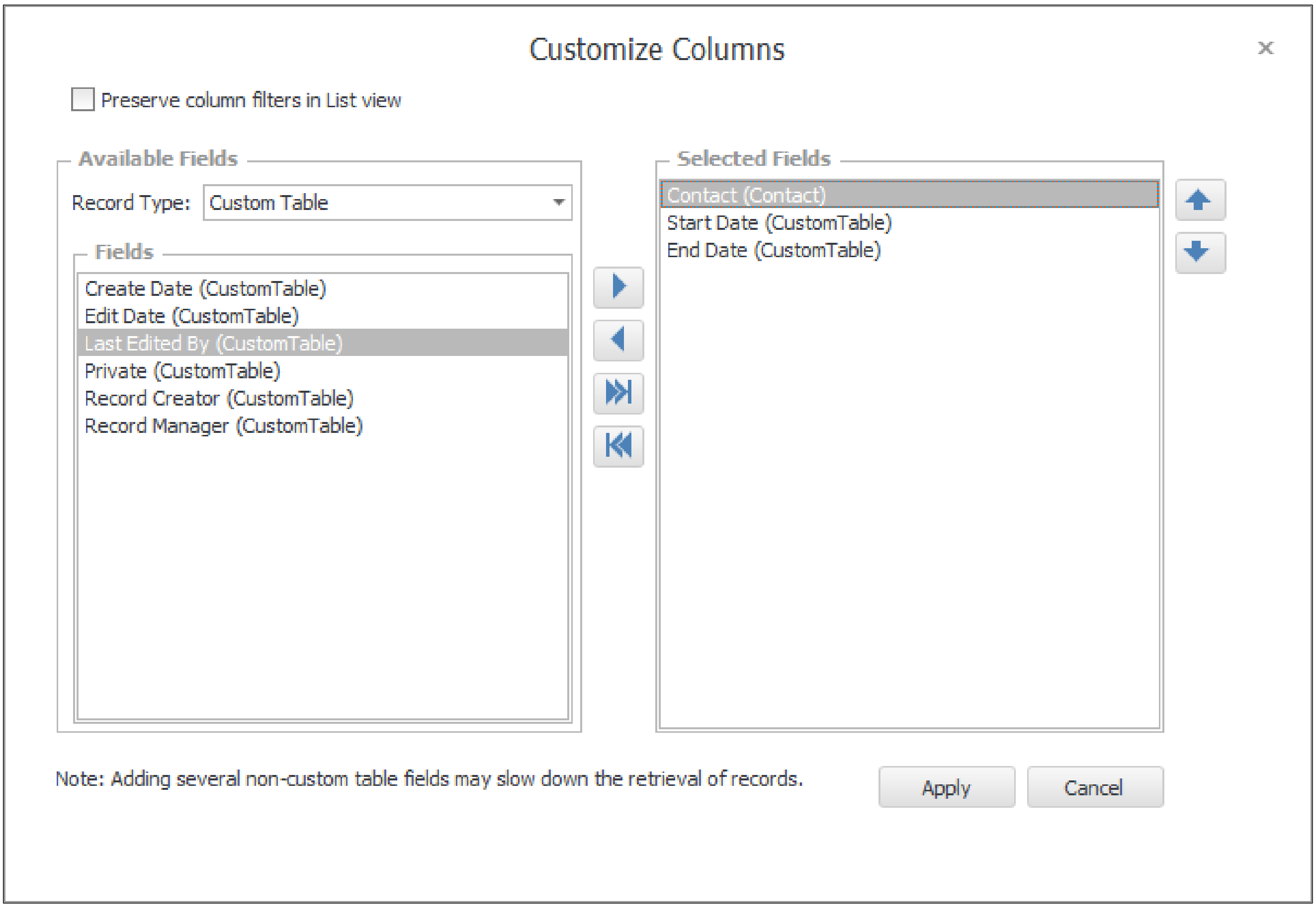
It is possible to create your own custom fields as well use fields from other entities in the Act! program (Contacts, Companies, Groups and Opportunities). Creating fields will be discussed later in the training.

To define the columns, firstly you need to select the **Record Type** that you wish to add.



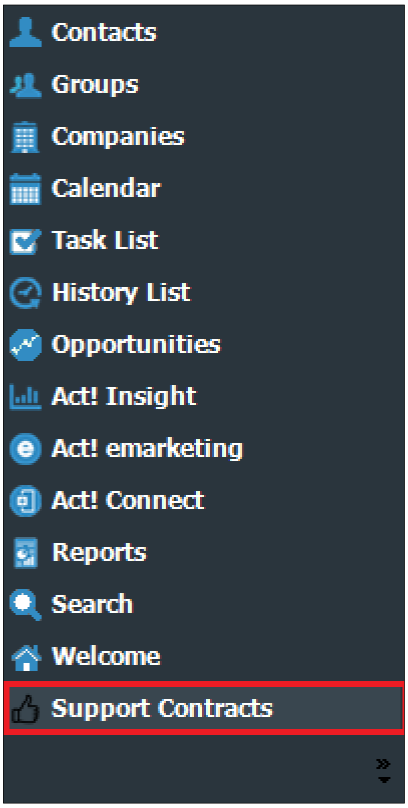
As you can see, it is possible to not only add your own Custom Table fields, but you can also pull information from the other Act! entities as well. You can use fields from multiple entities if you wish.

Once you have chosen the Record Type, simply click the fields you wish to show and use the **Arrow** icons to move them across. In this example we have added some custom table fields (we will cover how to create custom fields later in the training) as well as the Contact field from the Contact section as well.



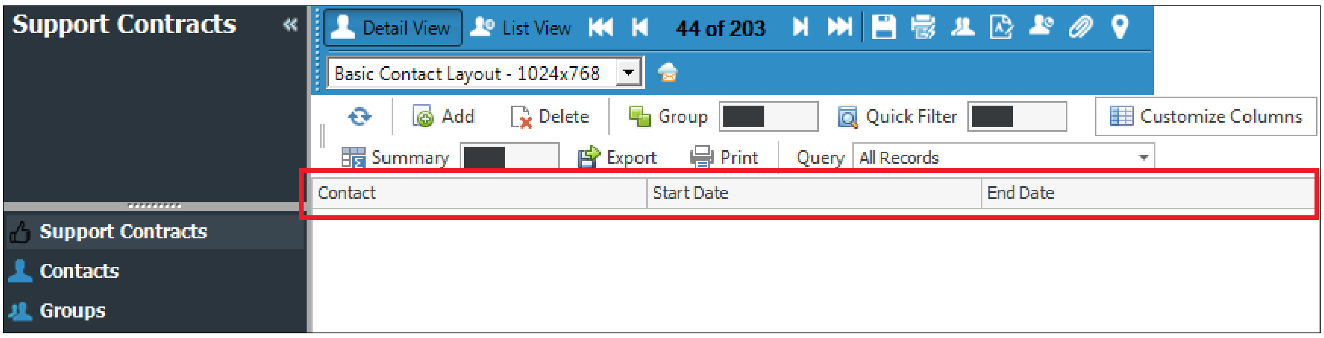
Click **Apply** to finish this process.

Now that the Custom Table has been created and the default columns have been added, it will already appear within the areas of the program you chose in the **Additional Settings** as discussed above. For example, if you selected the **Show in Navbar** option, you will now be able to select your Custom Table from the navigation stackbar.



Also if you chose any of the tab based Additional Options such as **Show in Contact tab**, you will now see the Custom Table has been added as a tab in the areas that you have selected.

Clicking on your new Custom Table in the stackbar or clicking any tabs you have added will now show the default columns that you have set.

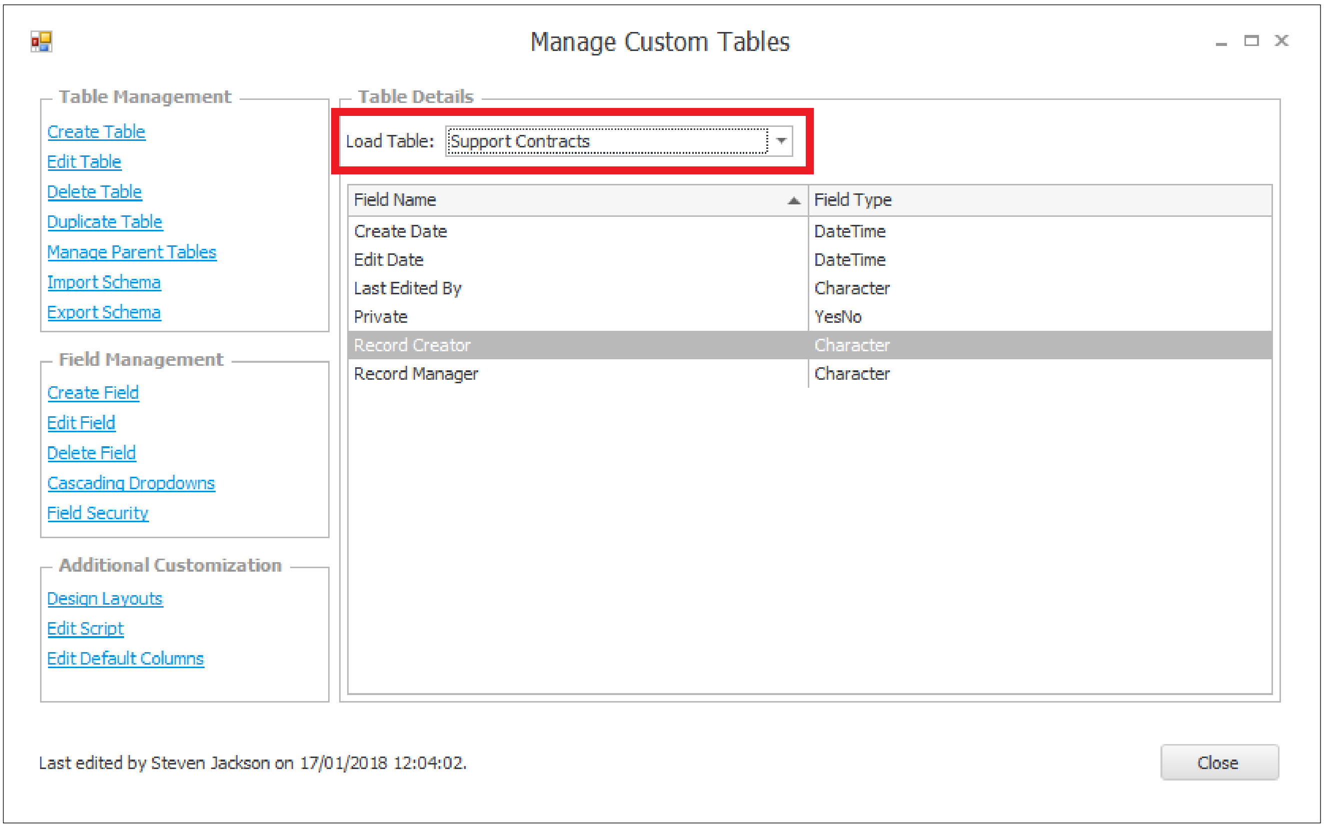


If this step was not taken, the Custom Table will appear blank.

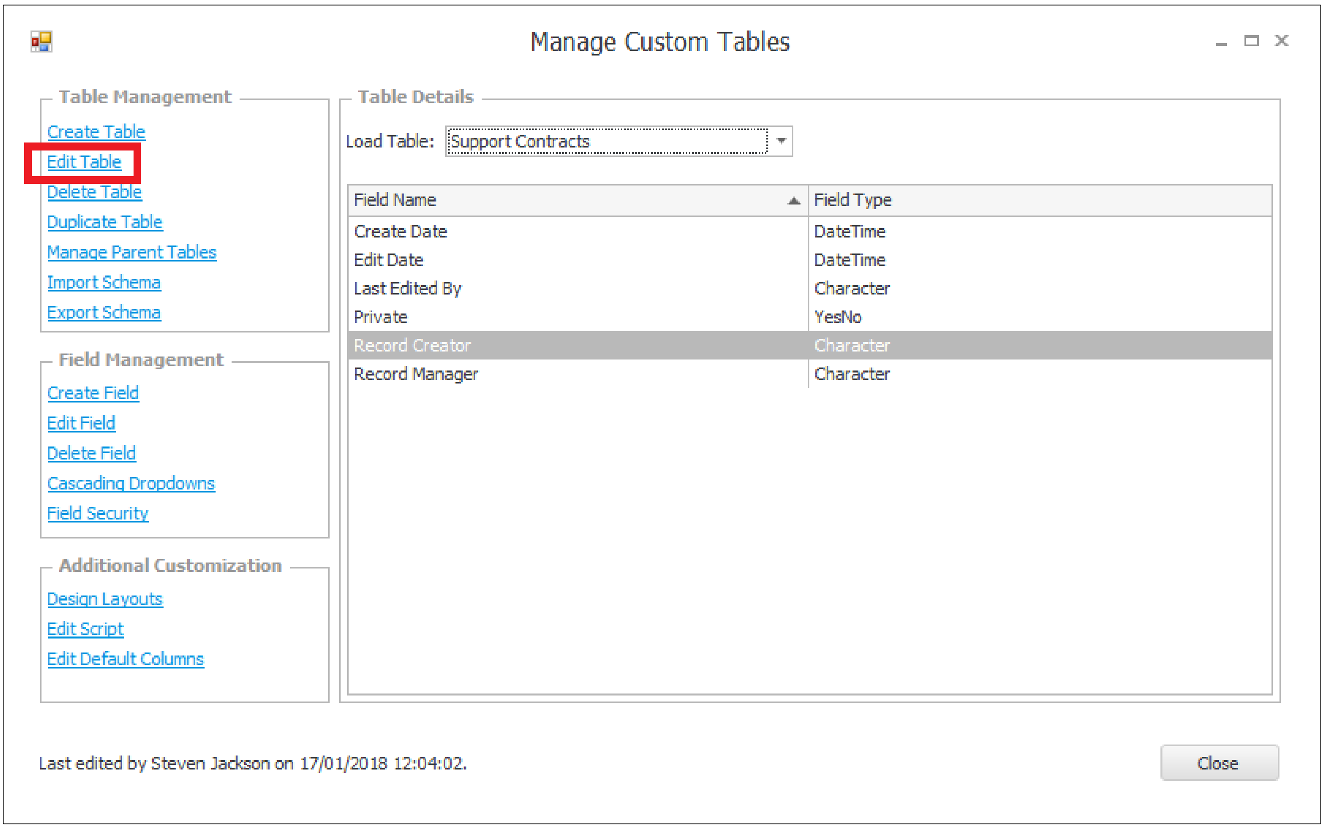
Editing Tables

Once you have created a Custom Table, you may wish to edit it or even delete it. We will discuss how to perform edits, which elements within the table can be edited, and how to delete tables below.

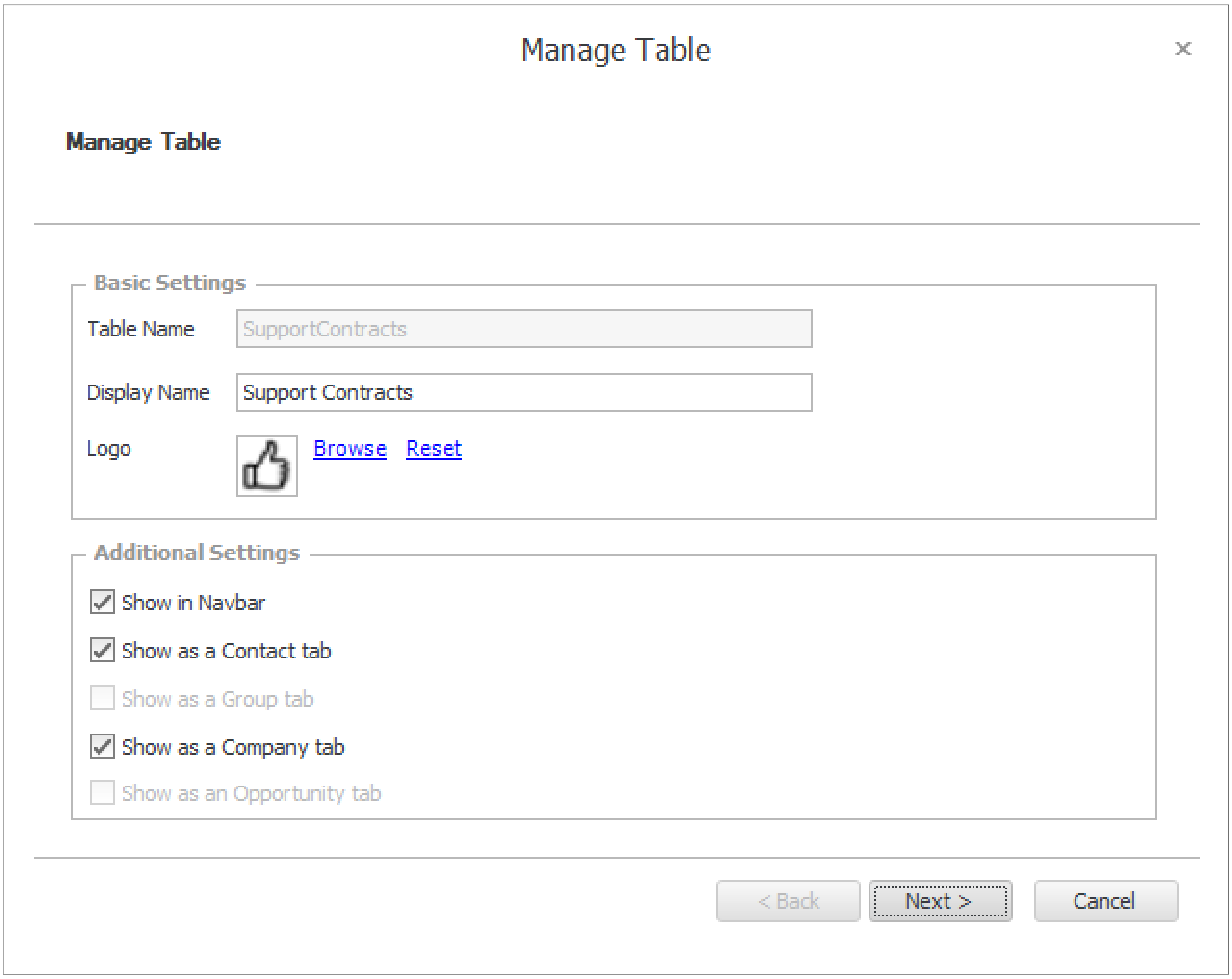
Click **Custom Tables** > **Manage Custom Tables**, then from the **Load Table** dropdown, select an existing table.



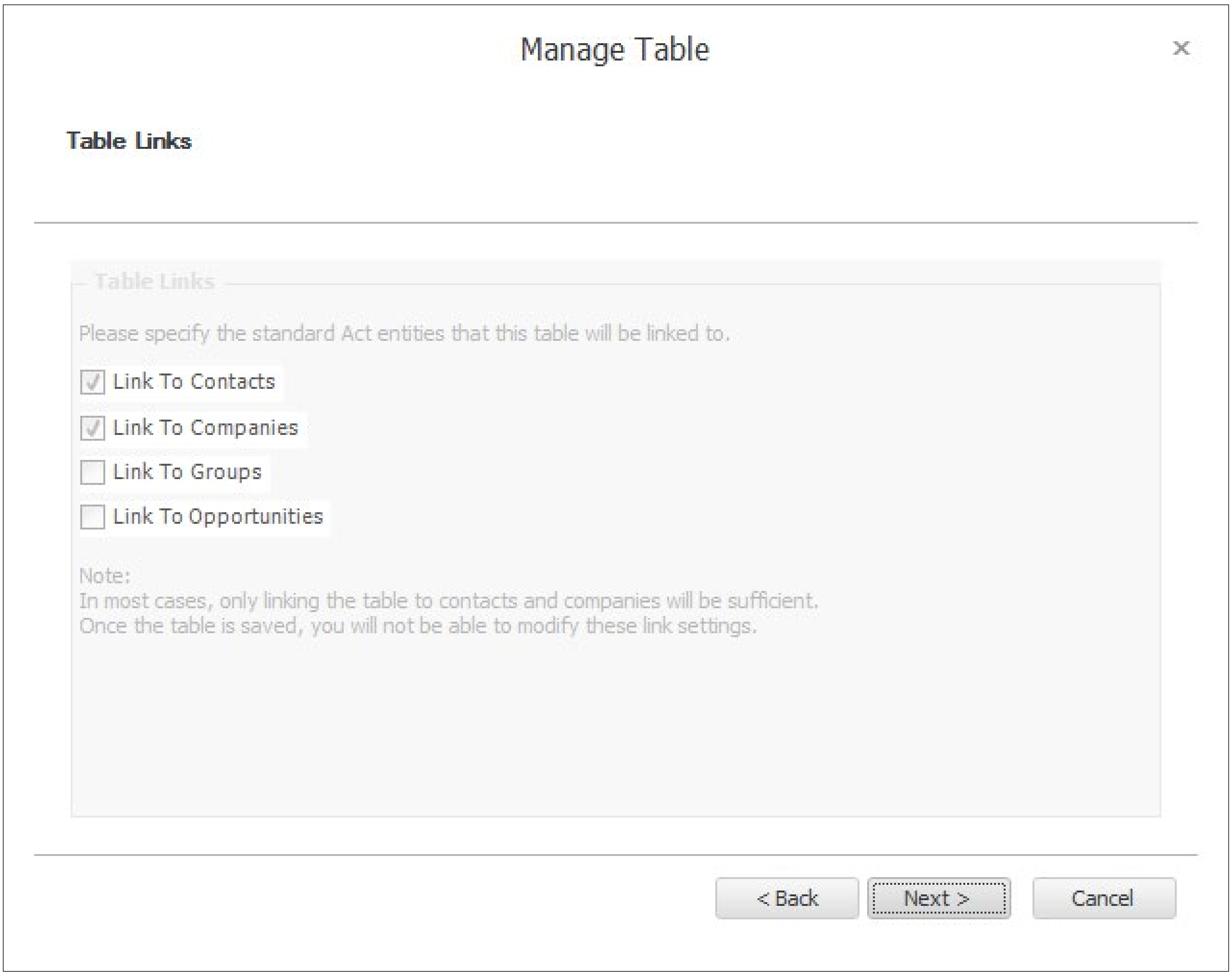
Click **Edit Table**.



As you can see from the screenshot below, you are able to edit the **Display Name**, the **Logo**, and the **Additional Settings**.



Remember though that the availability of the **Additional Settings** is very much linked to the next screen which shows the **linked entities**. The reason the **Show as a Group tab** and **Show as an Opportunity tab** are unavailable in the example above is because we did not select Groups or Opportunities as linked entities when we created the Custom Table. You can see this by going to the next screen.



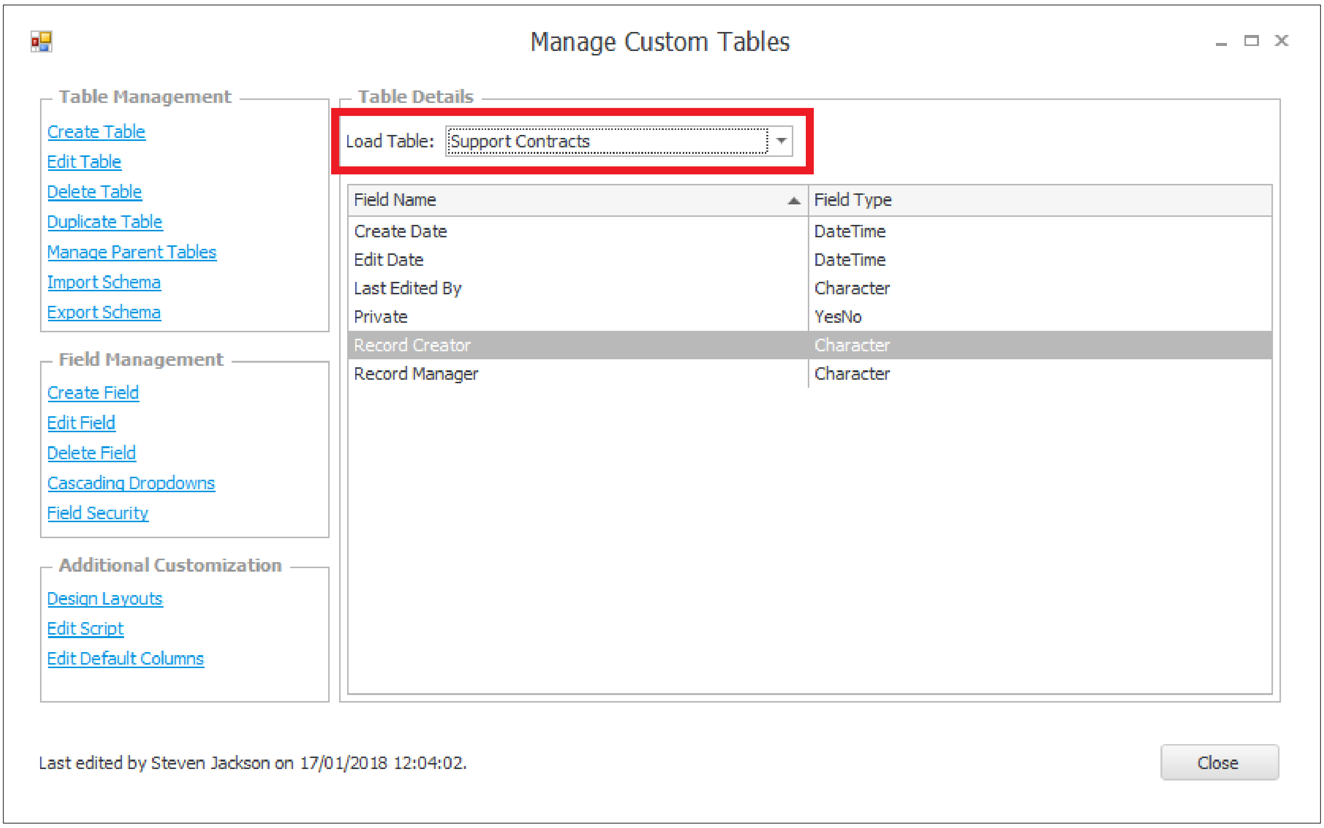
As mentioned earlier in the training, when you initially create your Custom Table and choose the linked entities, these **cannot** later be edited.

To save any changes you have made, click **Next** until you reach the end of the wizard, then click **Finish**.

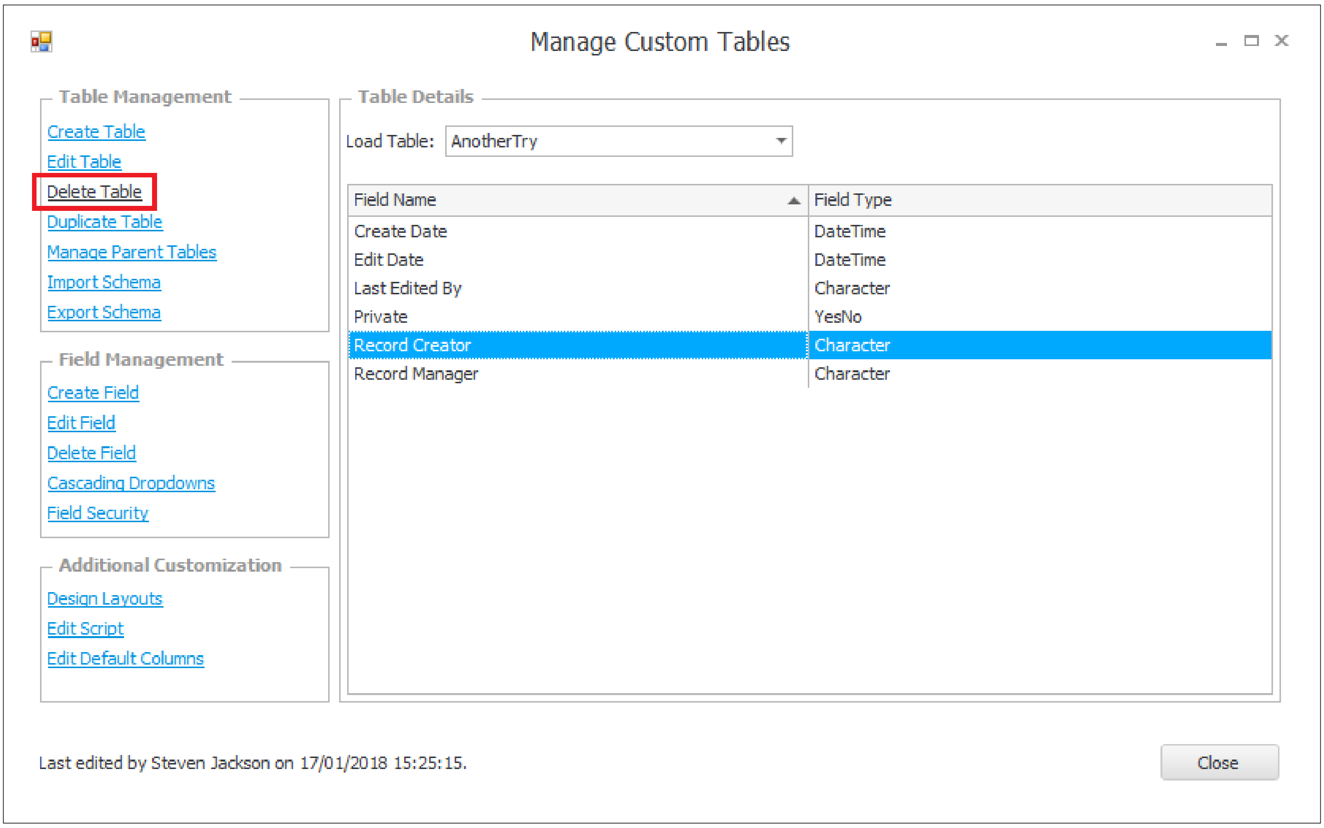
Deleting Tables

It is possible to delete any Custom Tables you have made. Deleting a Custom Table will delete it from all areas of the program (i.e. it will be removed from the navigation stackbar and if it has been added as tabs in any Act! entities these tabs will be removed as well) and any information you have saved within the Custom Table will be deleted as well.

To delete a Custom Table, click **Custom Tables** > **Manage Custom Tables**, then from the **Load Table** dropdown, select an existing table



Click **Delete Table**.



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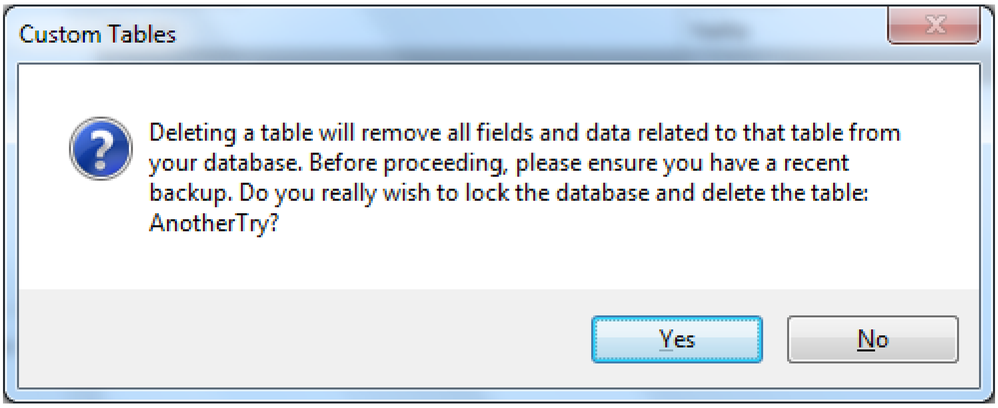
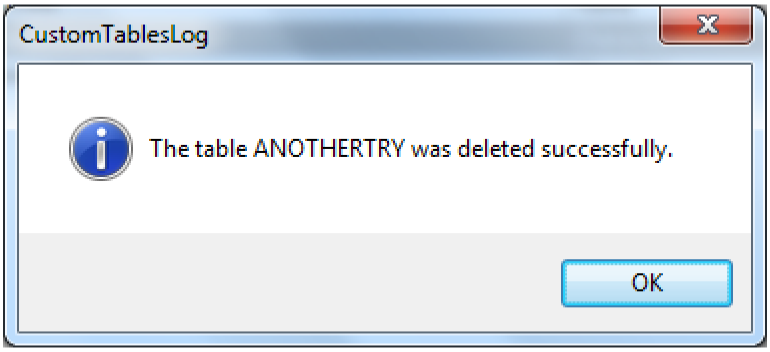
Click **Yes** to the following message.



The database will **Lock** as the Custom Table is deleted. This process can take a few minutes. Once completed, the following message will display.



Exercise

Create a Custom Table called **Support Contracts**. Make sure it can be viewed in the **navbar**, as well as the **Contacts** and **Companies** sections. Link the table to the **Contacts** and **Companies** sections.

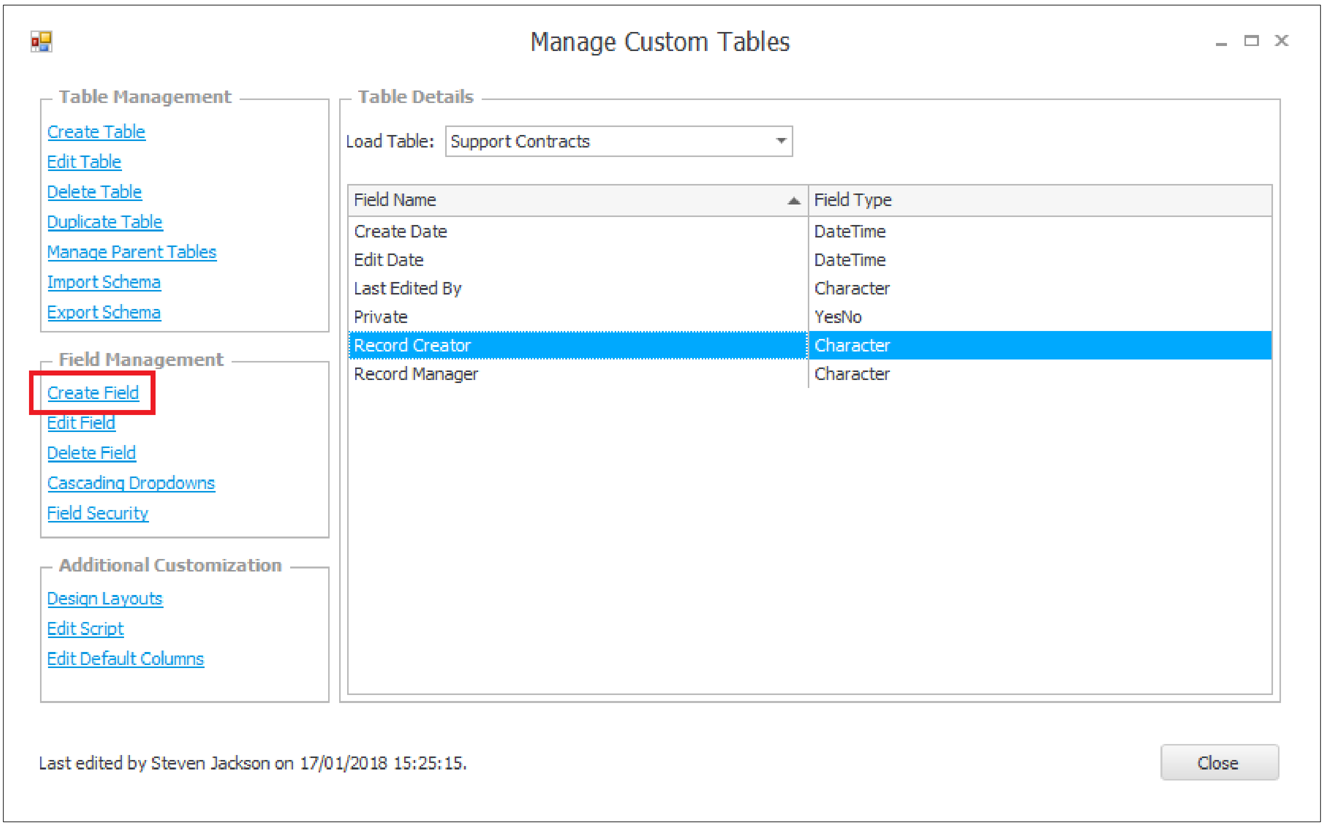
Managing Fields

Once you have created your custom table, it is possible to create additional fields to display within the table. As an example, if you have created a Custom Table for Support Contracts, you may require fields such as Contract Level, Contract Start Date, Contract End Date etc. We will look at the process of adding and amending custom fields now.

Creating Fields

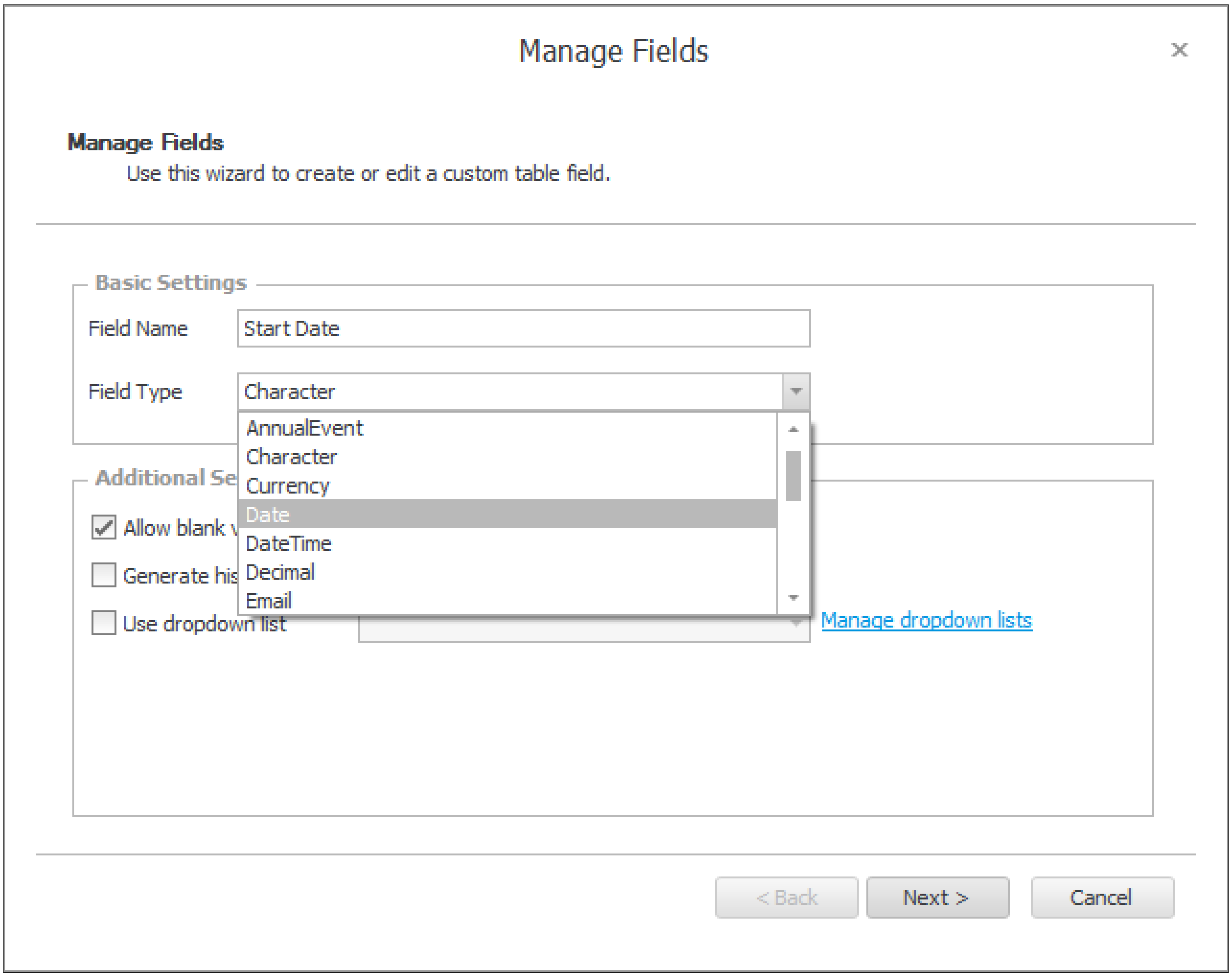
To begin, click **Custom Tables** > **Manage Custom Tables**, then select your table from the **Load Table** dropdown.

Under **Field Management** on the left, click **Create Field**.

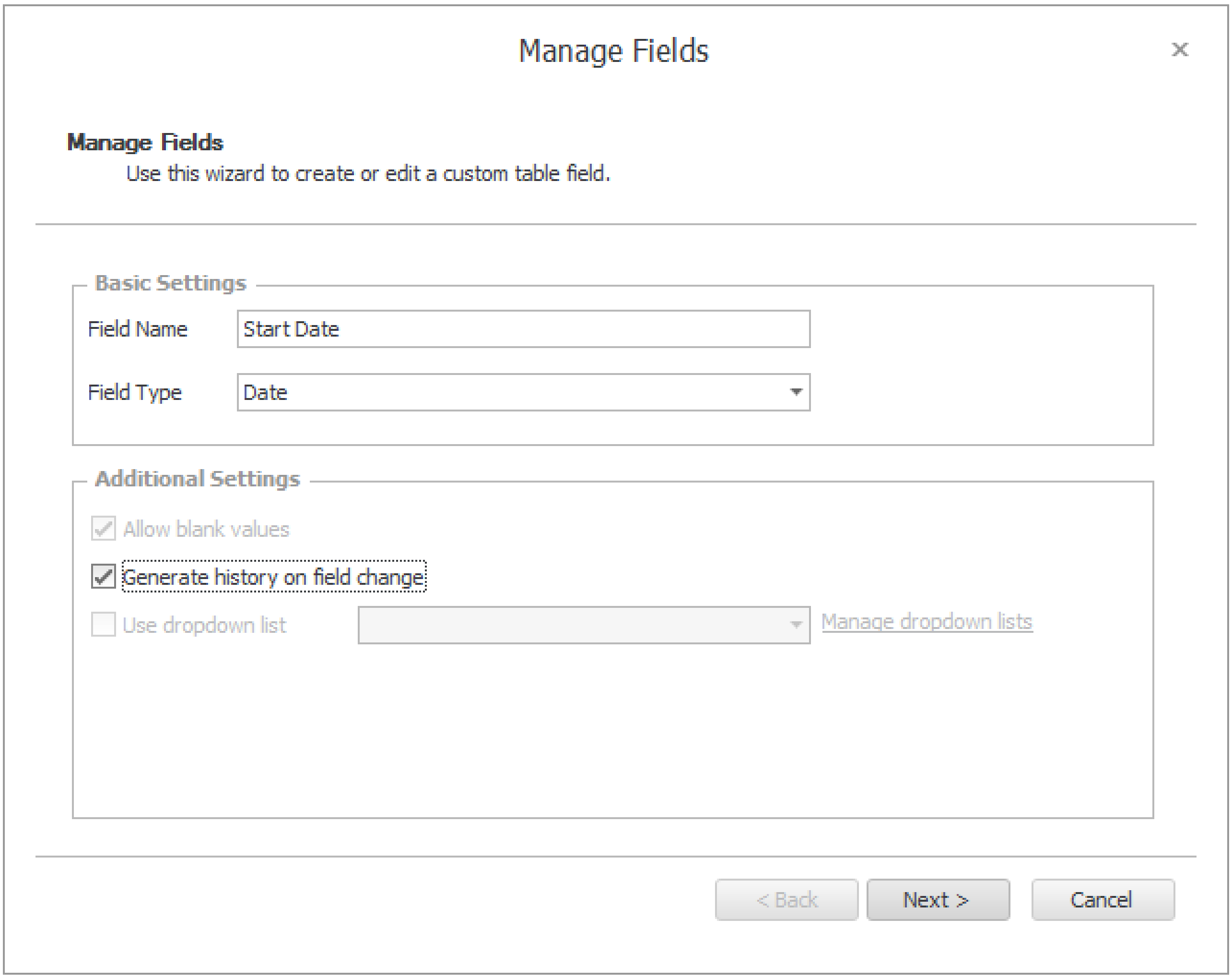


Enter a **Field Name**, and select a **Field Type** to match the data you wish to store. These types are the same as those found under the normal Define Fields section of Act!.

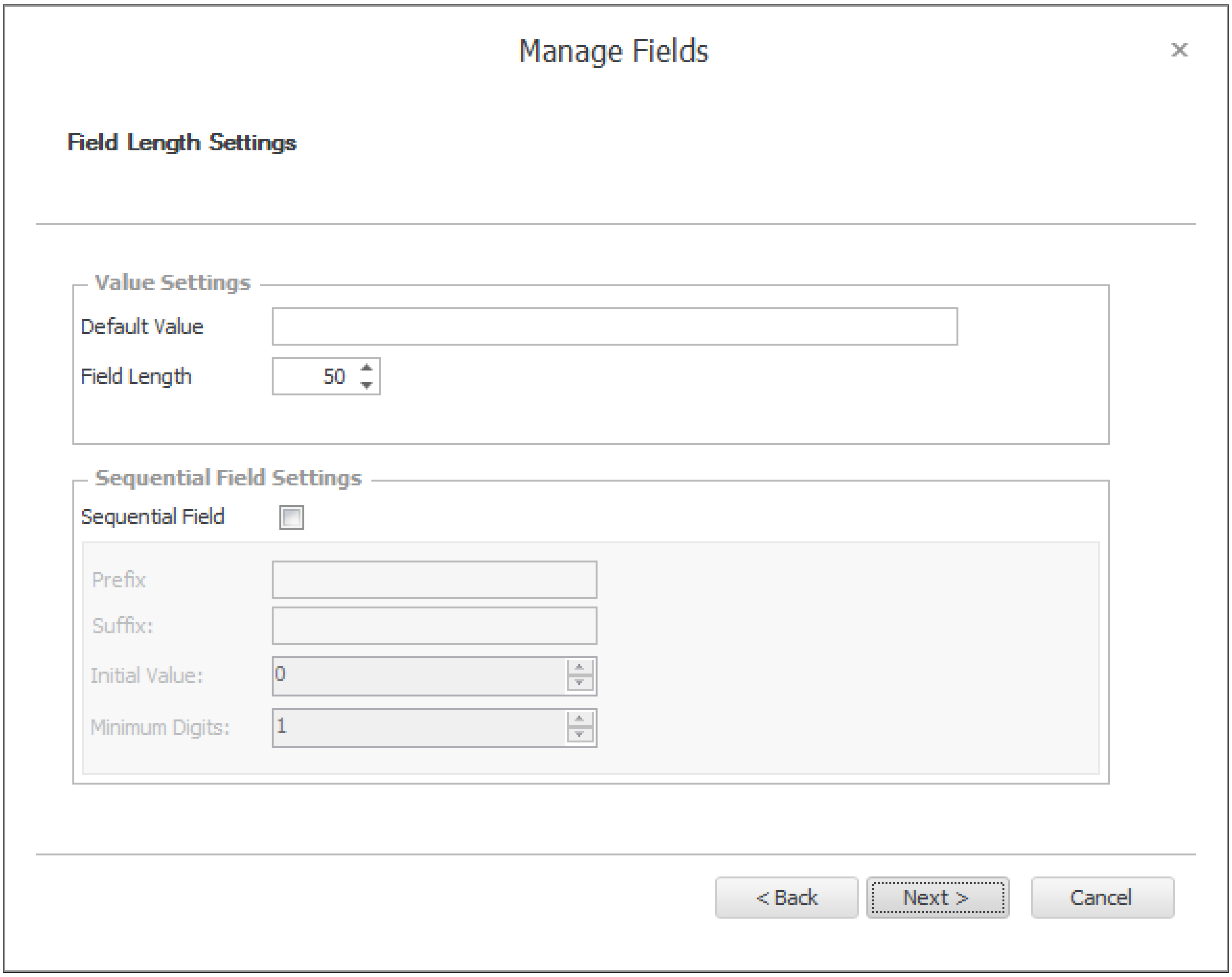
NOTE: Unlike the Define Fields section, once you have chosen a Field Type and created the field, this **cannot** be changed later.



Check any **Additional Settings** that apply. The options available in the Additional Settings are dependent on the Field Type you have selected, exactly the same as the normal Define Fields section of Act!. Once you have chosen the appropriate Additional Settings, click **Next**.

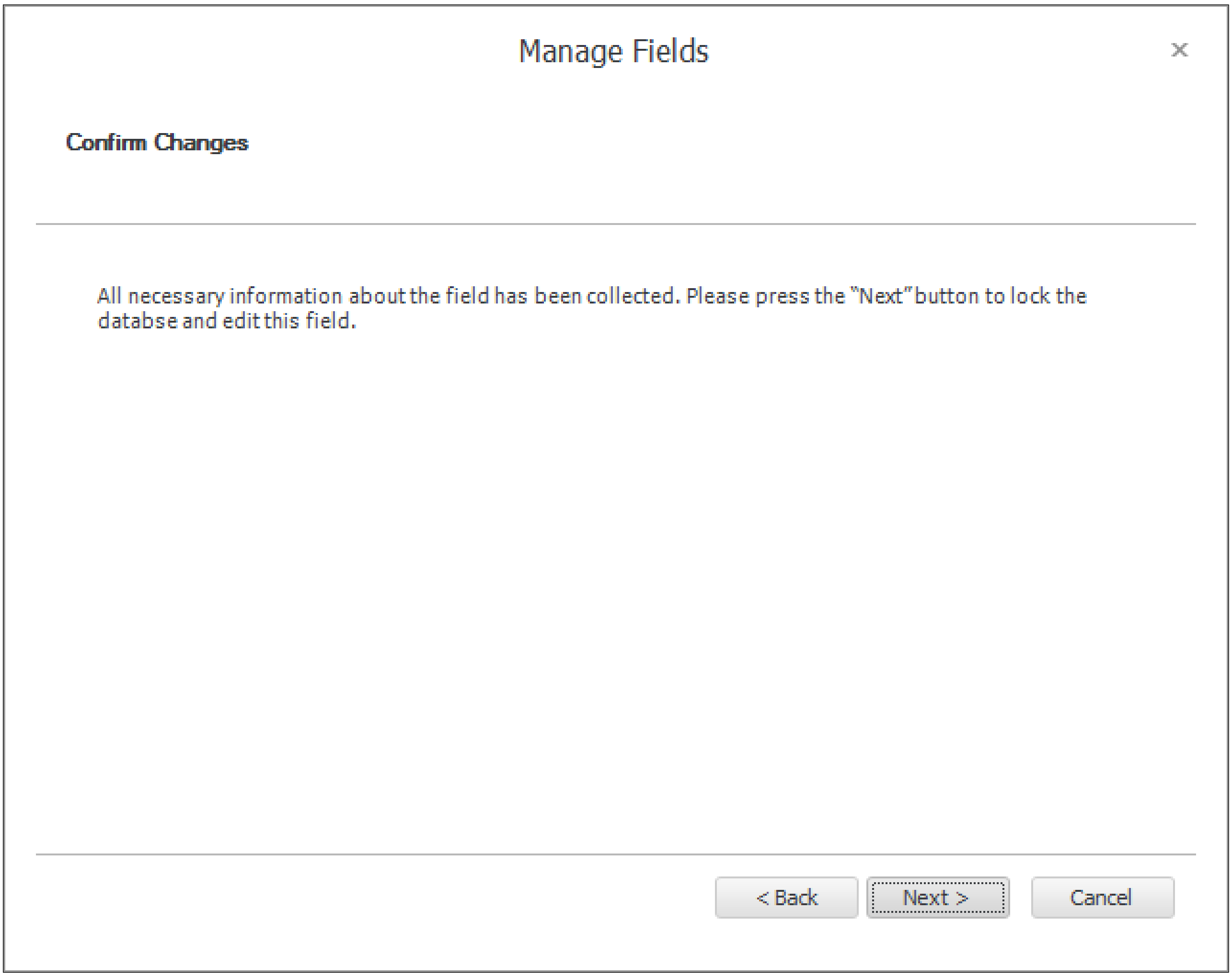


Further options in the creation wizard will once again depend on the **Field Type** that has been chosen. For example, if you have chosen a **Character** field, the next screen will look like this:

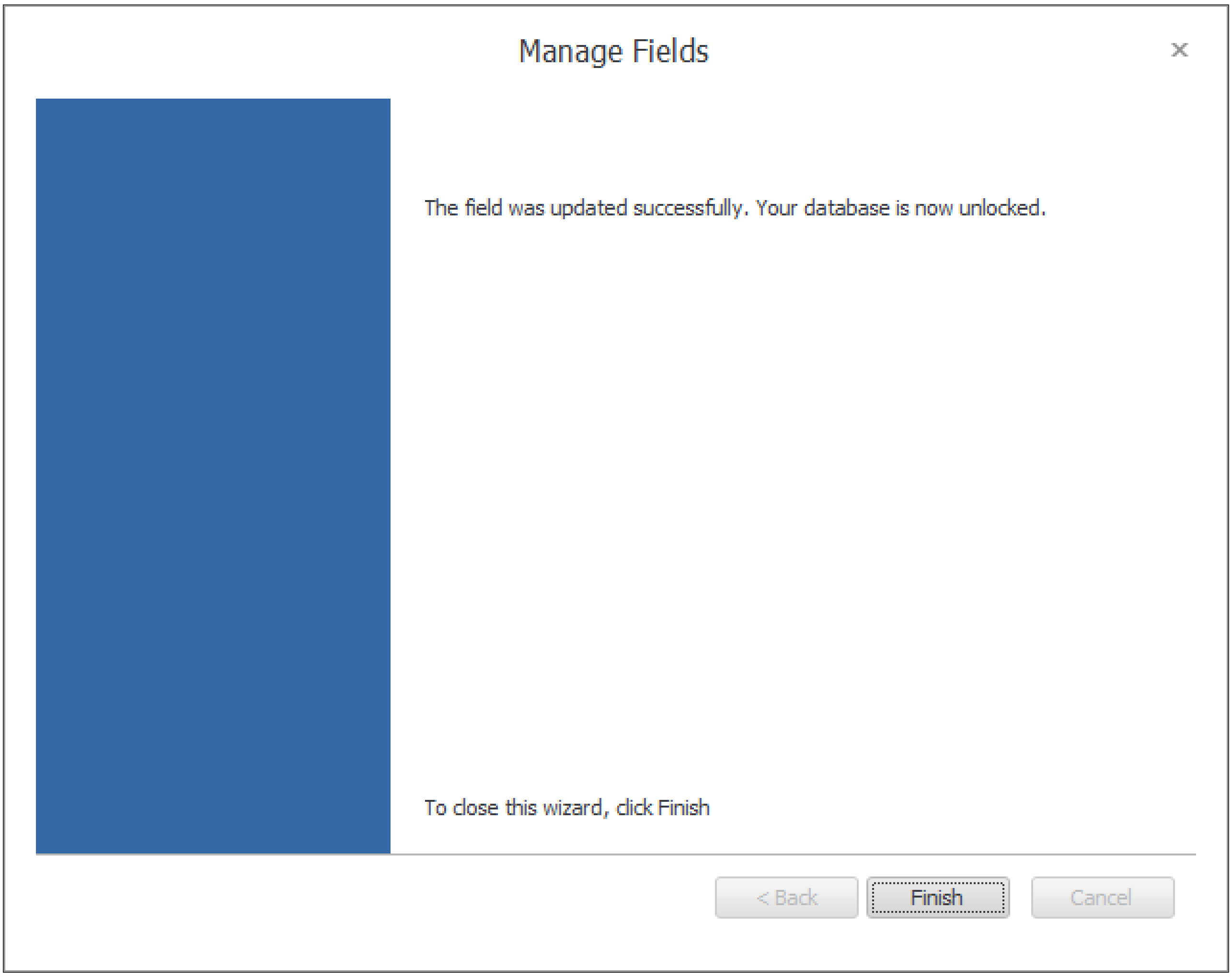


As you can see, you have options to specify a **Default Value** for the field if required, and set the **Field Length**. Ignore the **Sequential Field** Settings for now as this will be covered later.

Alternatively, if you have chosen a **Date** field, the next screen you see will be the final confirmation screen.



Click **Next** then **Finish**.



Editing Fields

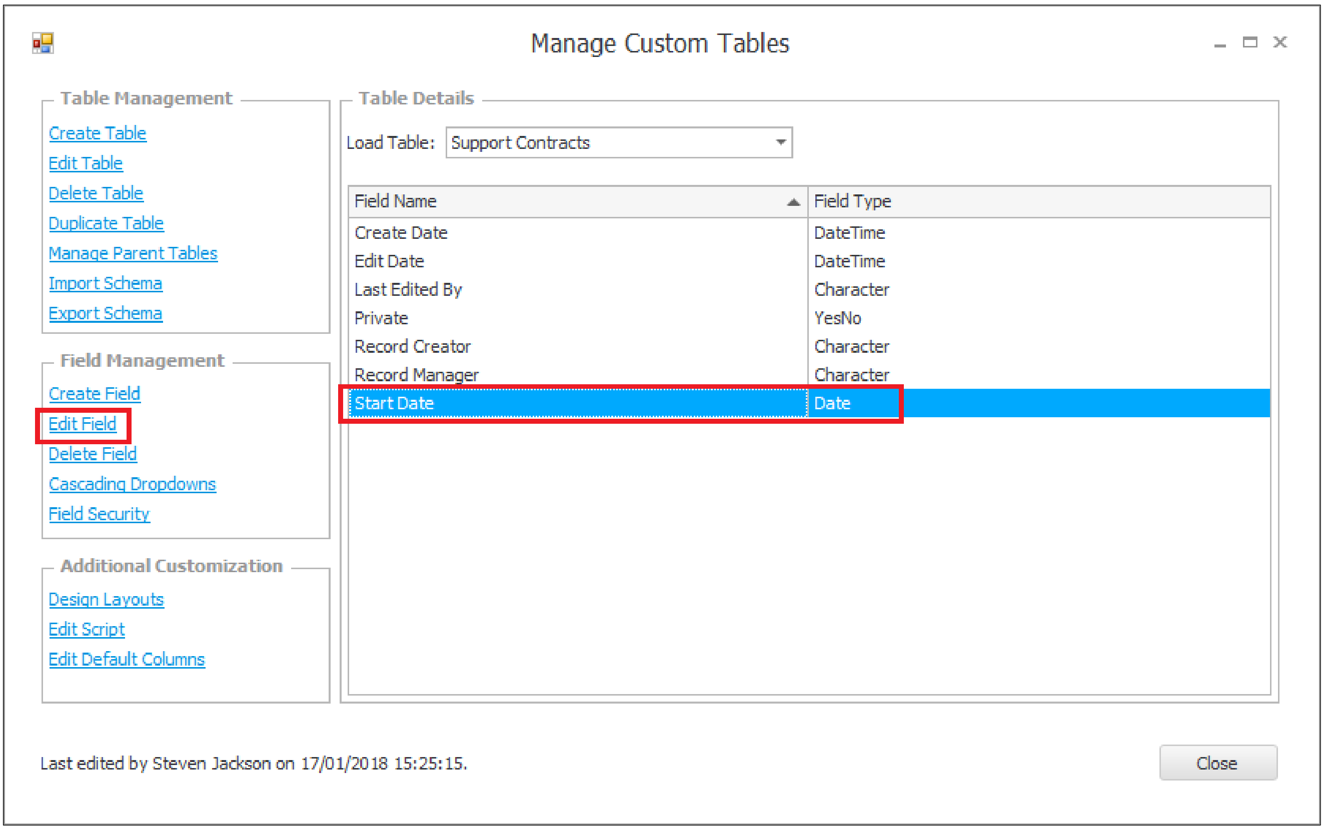
Once you have created custom fields, you can perform some edits on them, much the same as with the normal Define Fields section of Act!.

NOTE: You can only edit **custom fields** that you have created. The standard default fields that are always created with each new table **cannot** be edited.

To edit a custom field, click **Custom Tables** > **Manage Custom Tables**, then select a table from the **Load Table** dropdown.

Click the field you would like to edit.

Click **Edit Field** on the left to edit the field's properties.

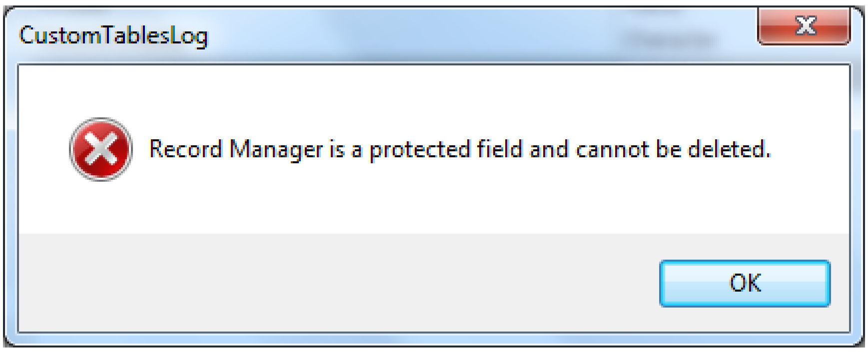


As mentioned previously you cannot amend the Field Type, however the rest of the options you have selected such as the Field Name, the Additional Settings or the Default Value and Field Length can all be successfully amended.

Deleting Fields

As well as the ability to edit custom fields, you can also delete them should you need to. As you would expect, deleting a field in this manner will delete all of the information within that field.

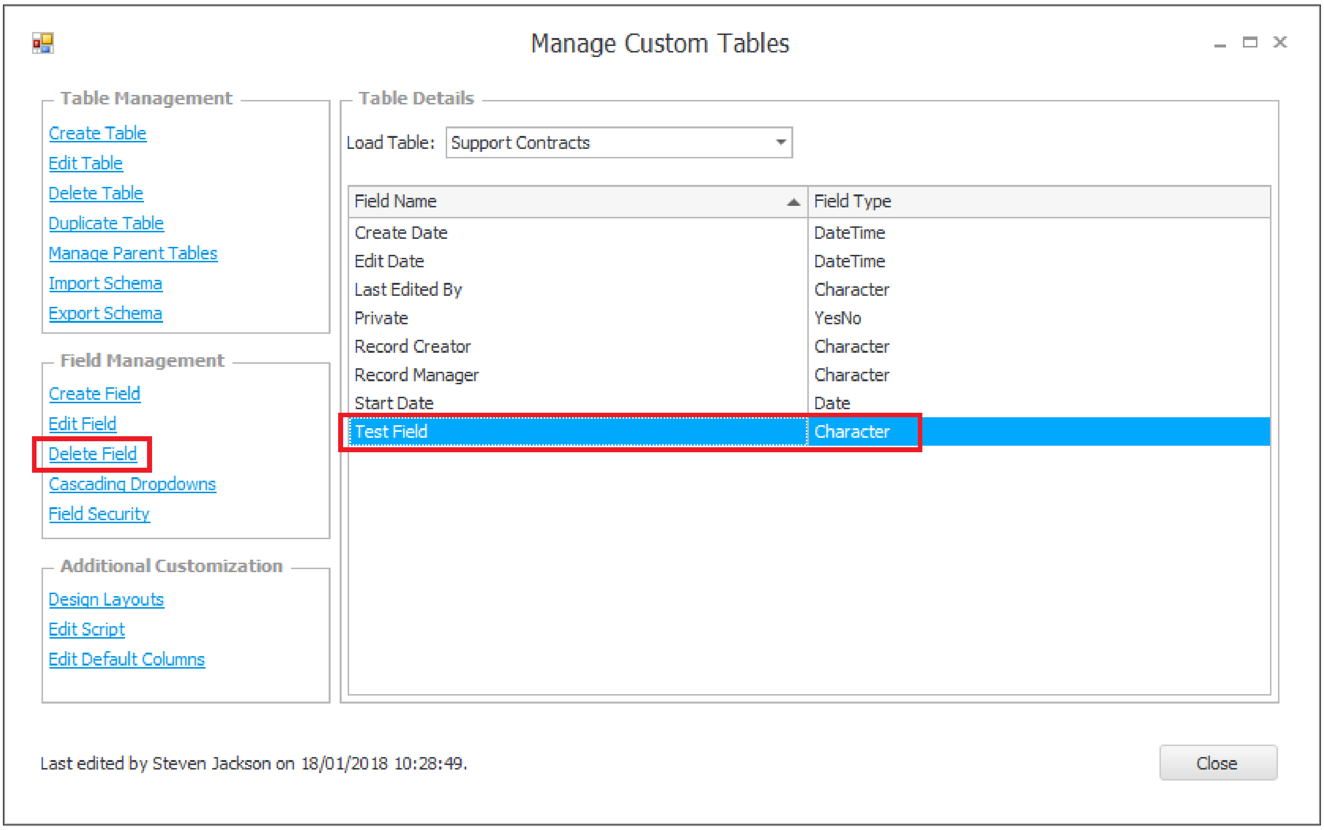
NOTE: You can only delete **custom fields** that you have created. The standard default fields that are always created with each new table **cannot** be deleted. If you attempt to delete these fields, you will receive the below error:



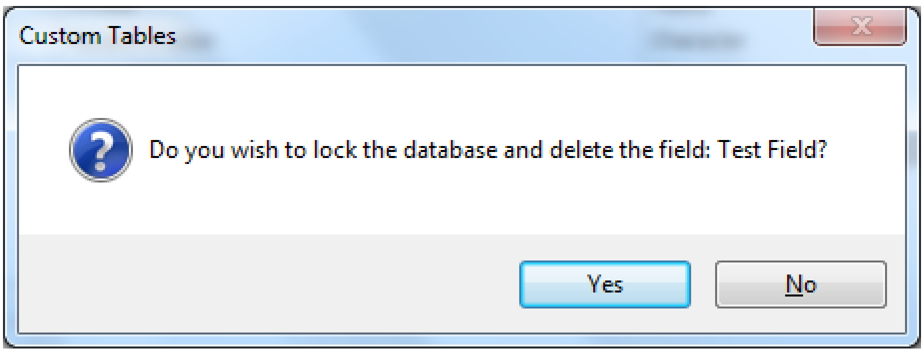
To delete a custom field, click **Custom Tables** > **Manage Custom Tables**, then select a table from the **Load Table** dropdown.

Click the field you would like to delete.

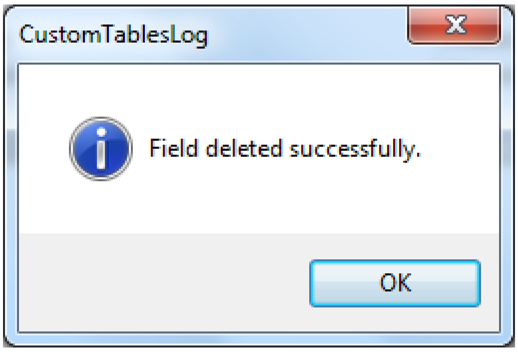
Click **Delete Field** to remove the field from your database.



You will receive a warning advising that the database will be **locked** and the selected filed **deleted**.



Click **Yes** to proceed. This can take a few seconds to complete successfully at which point you will receive the following message.



Click **OK**.

Exercise

Create **2** new fields for your **Support Contracts** Custom Table. Call these fields **Star Date** and **End Date**, and make sure they are set as **Date** fields.

Amend the **Default Columns** (see the Managing Tables section) to show the **Contact** name, the **Start Date**, and the **End Date**.

Creating Layouts

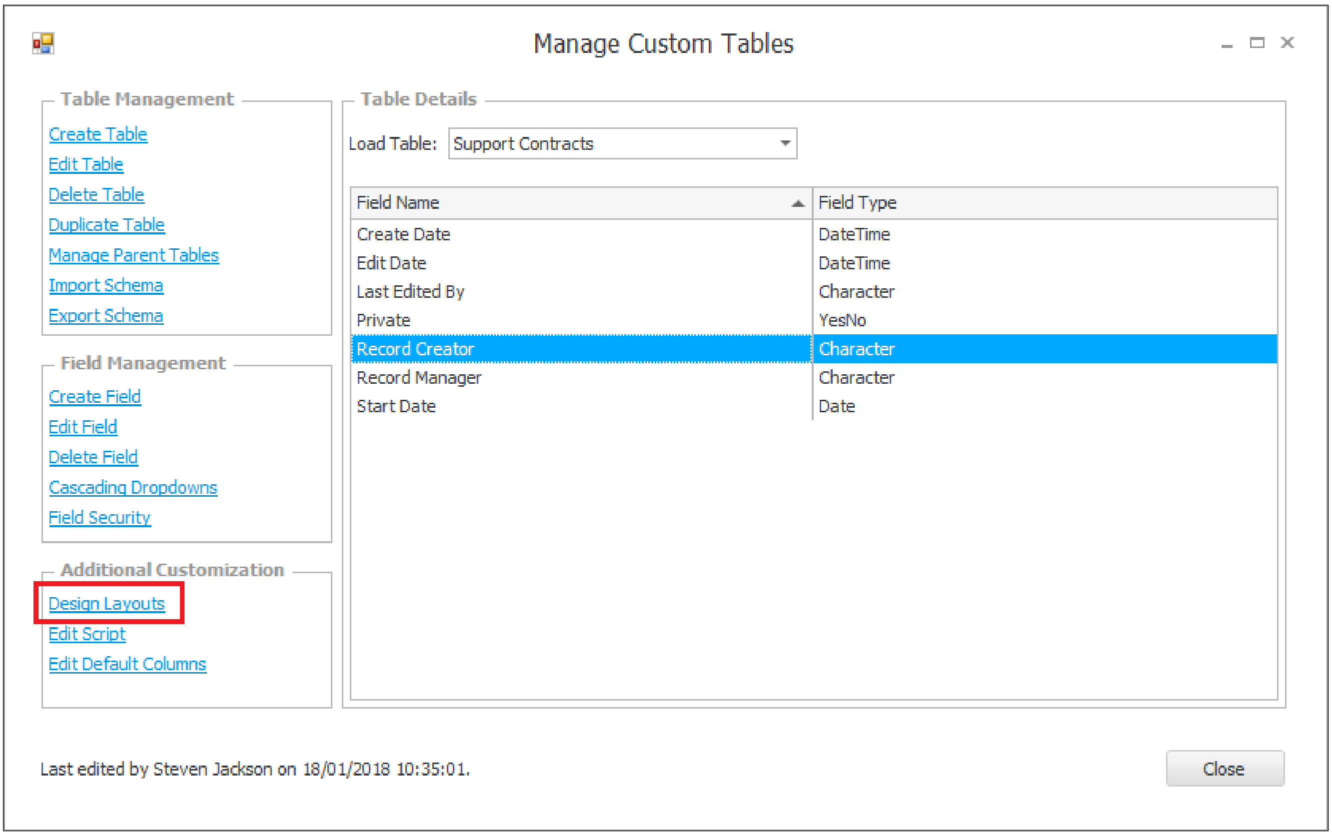
After you have created a Custom Table, in order to actually make use of it you must create a layout. This layout will be used if you have added the Custom Table to the navigation bar, and also if you have added it as a tab. it is possible to create multiple layouts if you wish.

As the process for creating a layout differs slightly between the desktop and web version of Act!, we will cover each process separately below.

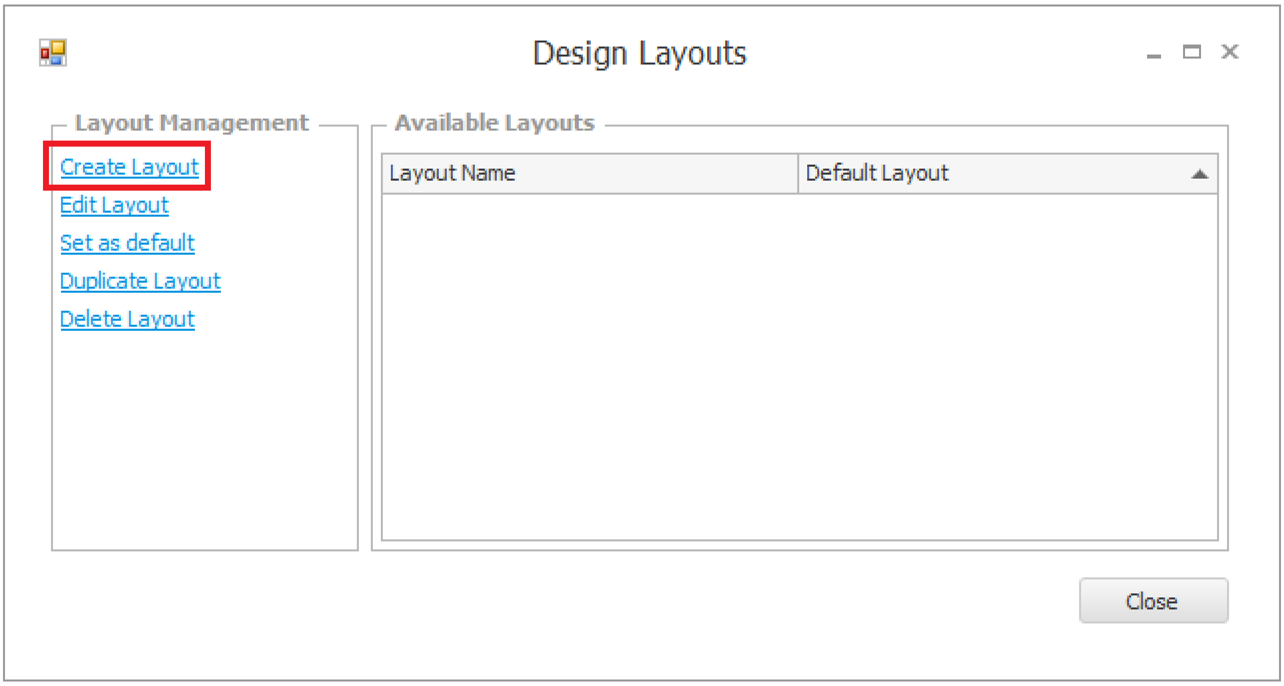
Creating a Layout (Desktop Client)

To begin, click **Custom Tables** > **Manage Custom Tables**, then select a table from the **Load Table** dropdown.

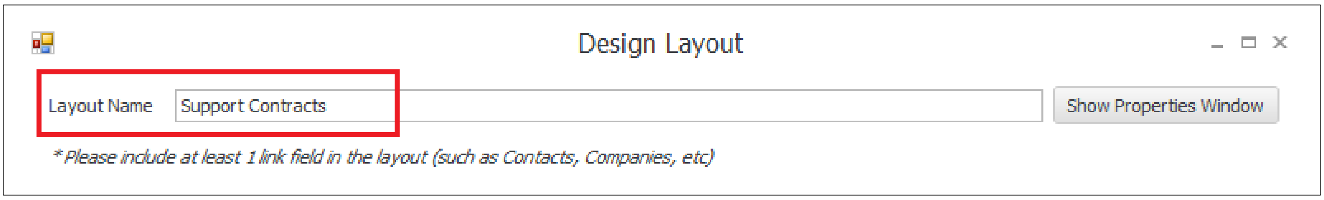
Under **Additional Customization** on the left, click **Design Layouts**.



Click **Create Layout**.



At the top of the **Design Layout** view, enter a **Layout Name**.



By default there may already be certain fields showing in the Design Layout view. When creating your table, towards the end of the wizard you were asked to select entities to link the table to. In order to correctly link your Custom Tables to an Act! record (such as a Contact), you must provide a linking field. In the example we have been using throughout this training, we could create Support Contract records in our Custom table, then link these to individual Contact records in Act!.

In our earlier example, we chose to link our Support Contracts Custom Table to the Contacts and Companies sections of Act!. Therefore, when we go to create a layout, the program has already added the Contact field and Company field for us to be used as linking fields.

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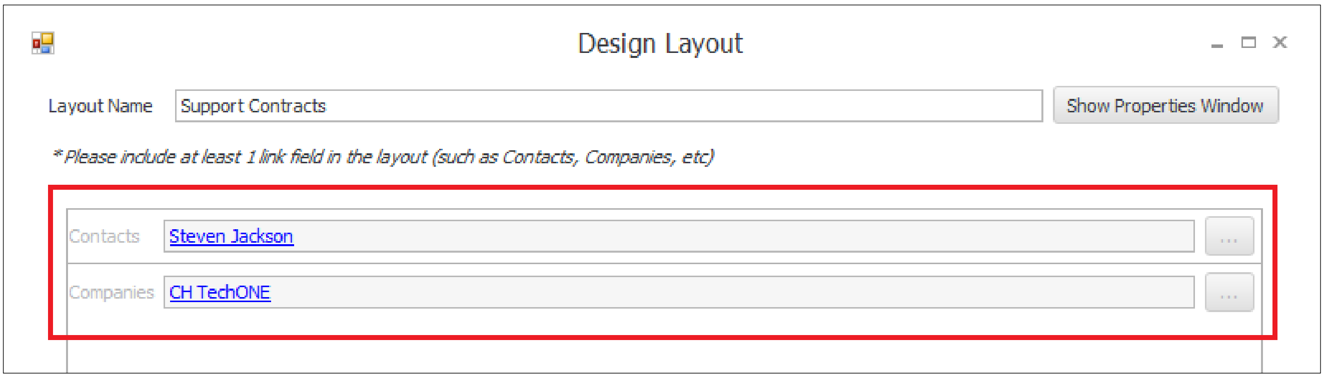
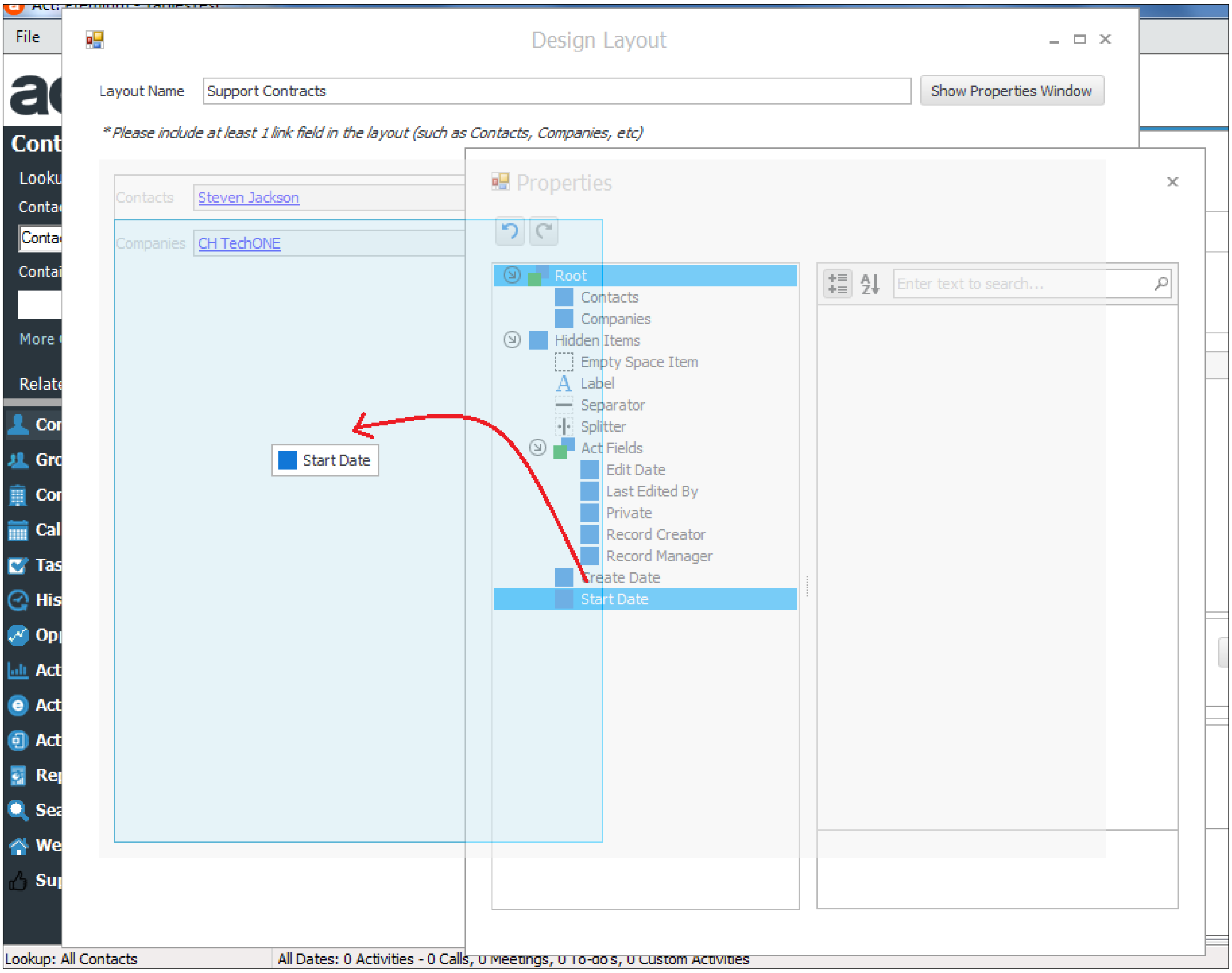


The fields show values to demonstrate the information that will be displayed once you finish creating the layout.

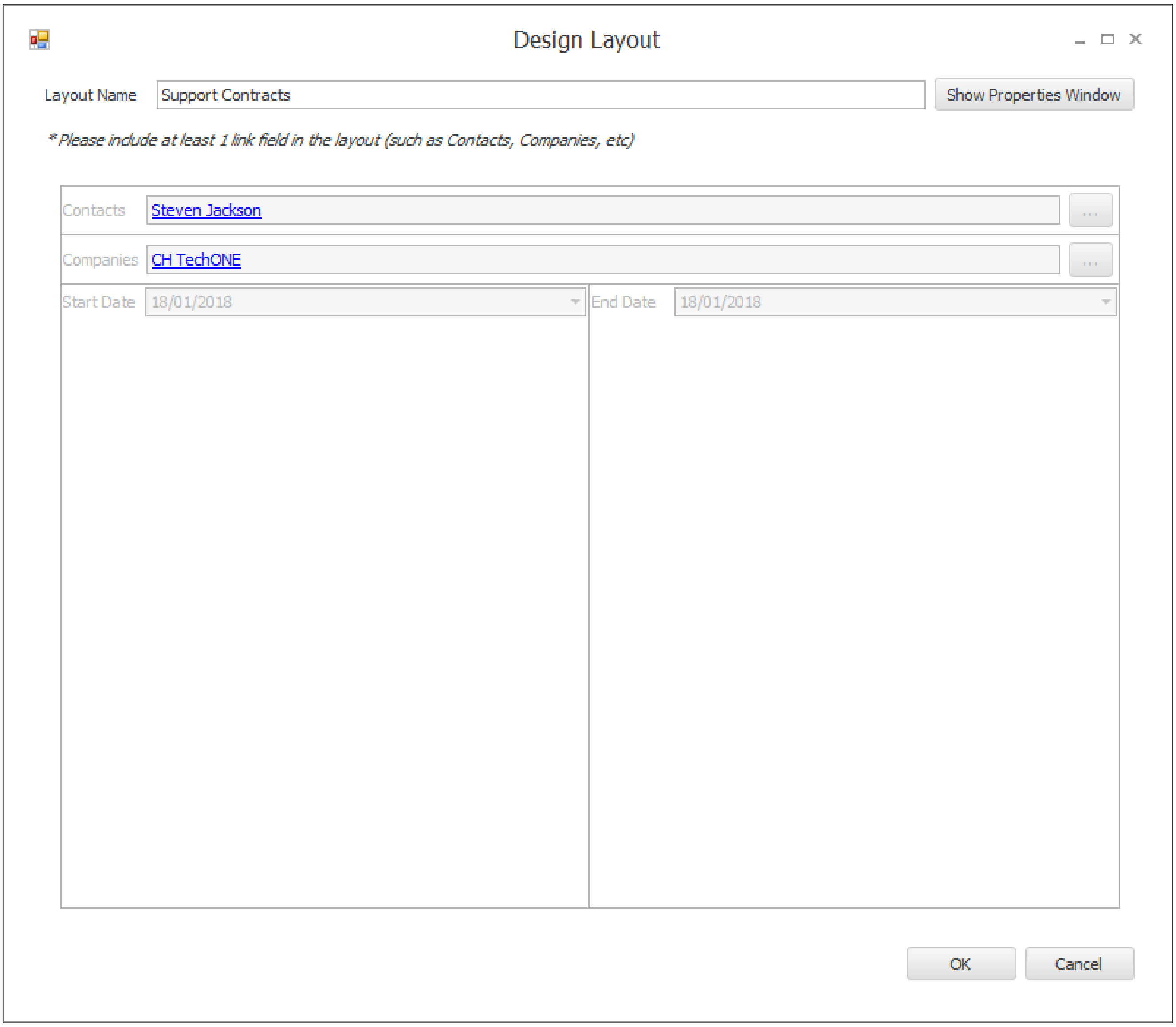
To add your custom fields, click and drag them from the **Properties Window** over to the Design Layout view (if you cannot see the Properties Window then click on the **Show Properties Window** next to the Layout Name field).



Back to Top

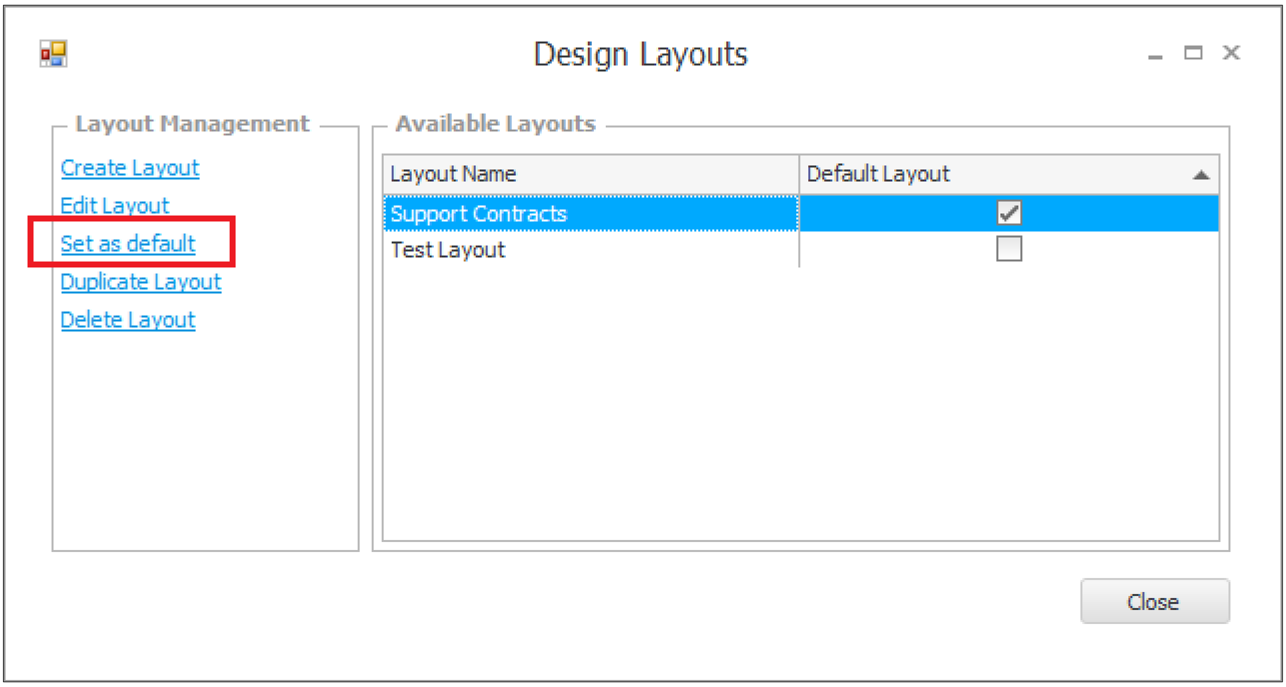
The Layout Designer is designed to be quite intuitive. As you drag fields across, the Layout Designer will highlight in pale blue (as can be seen in the screenshot above) where the field will be placed when you release the mouse button. In this way you can easily drag fields into a list, you can add them as columns, you can place new fields between existing ones on your layout or a combination of the above until you are happy with the design. If you want to remove a field, you can click on it then press the delete key on your keyboard.

As a quick example of just dragging and dropping the various fields, we have created 2 custom fields called **Start Date** and **End Date**, then dragged these onto the layout so they appear side by side beneath the **Contacts** and **Companies** fields (remember these are our linking fields).



Click **OK** to save the layout.

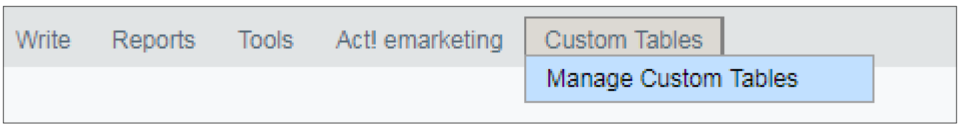
Note that **only the default layout** will be displayed to users. If multiple layouts are created, select a layout and click **Set as default** to display this for all users.



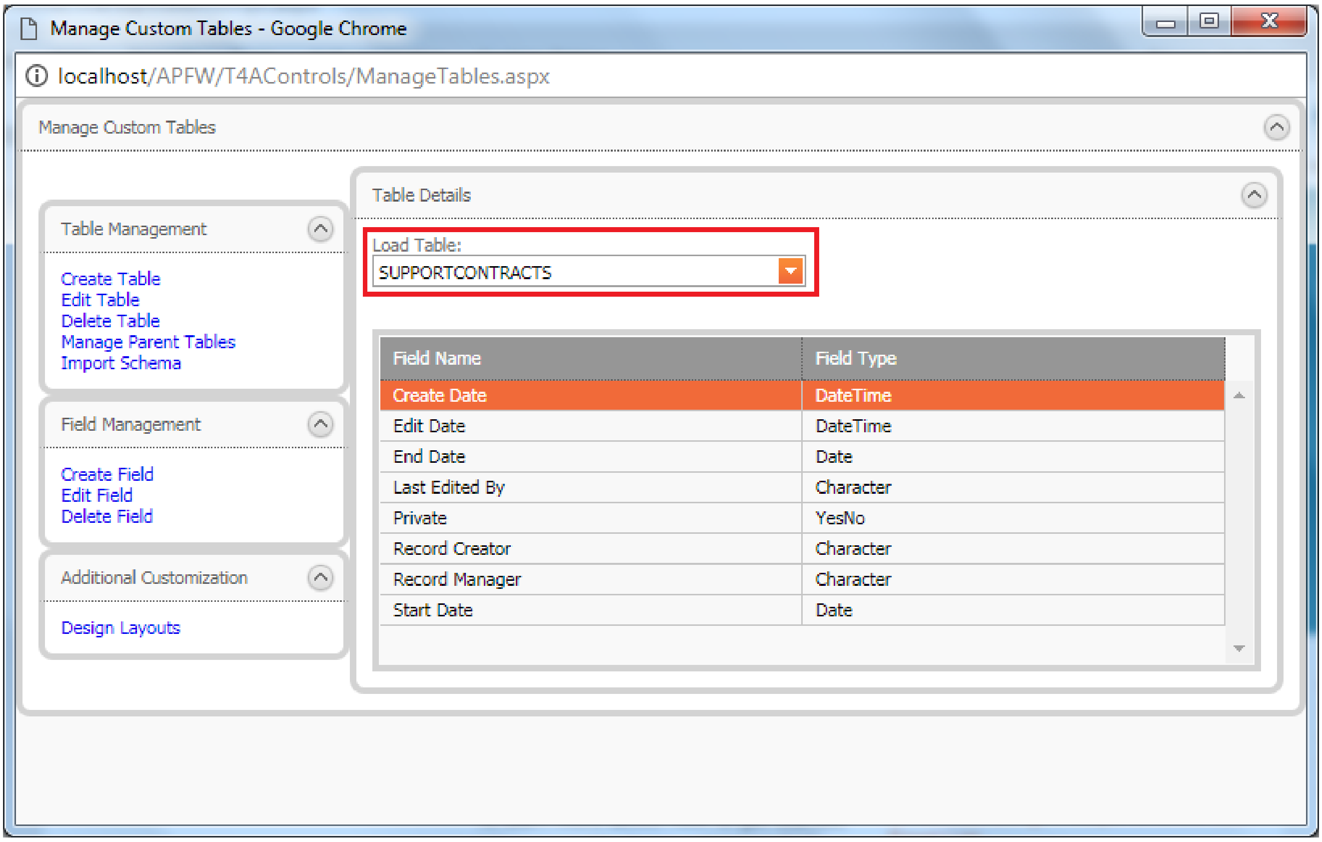
Creating a Layout (Web Client)

As previously mentioned, the process for creating a layout within the web client is different to the desktop version so we will cover this below.

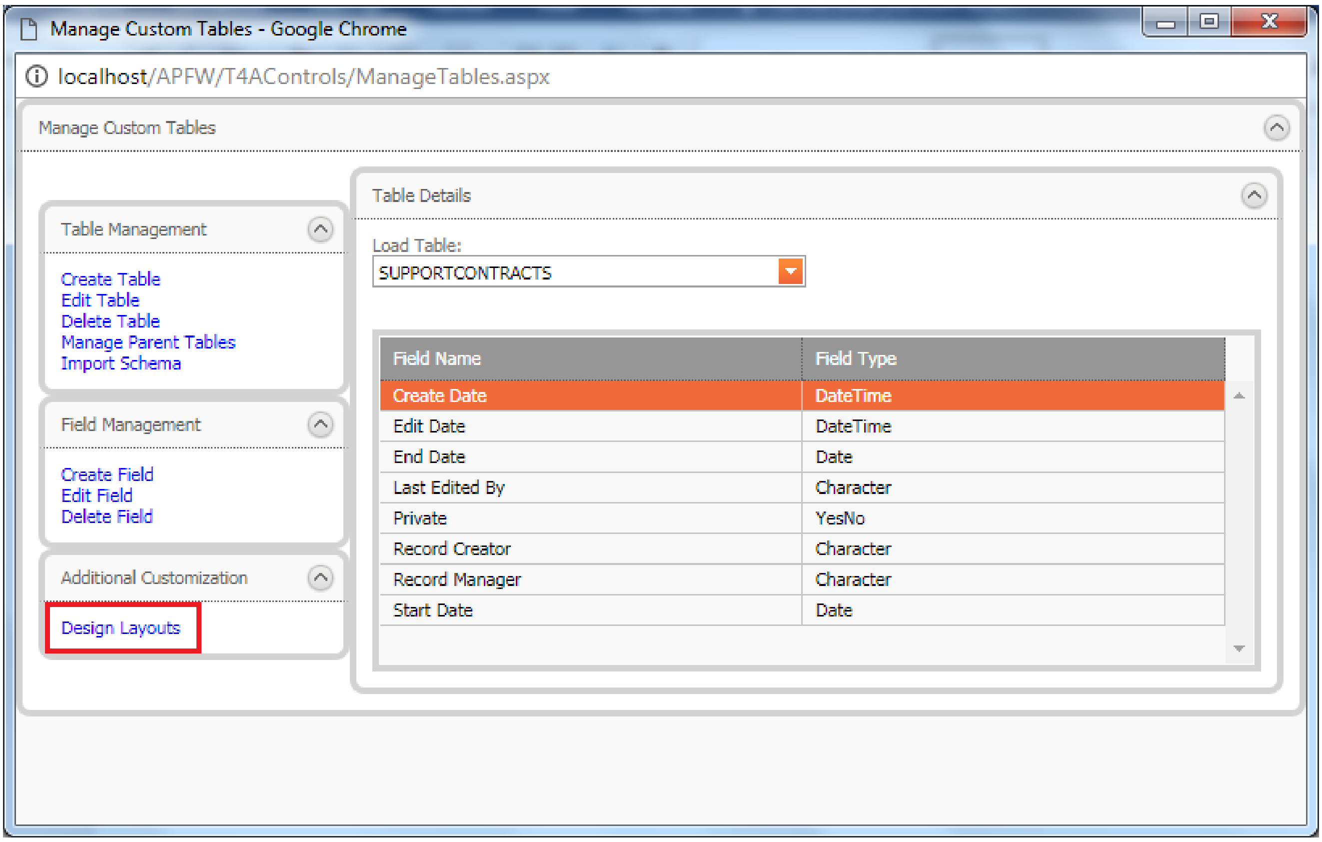
Begin by clicking **Custom Tables** > **Manage Custom Tables**. Note that this is the **ONLY** option available in the Custom Tables menu in the web version of Act!.



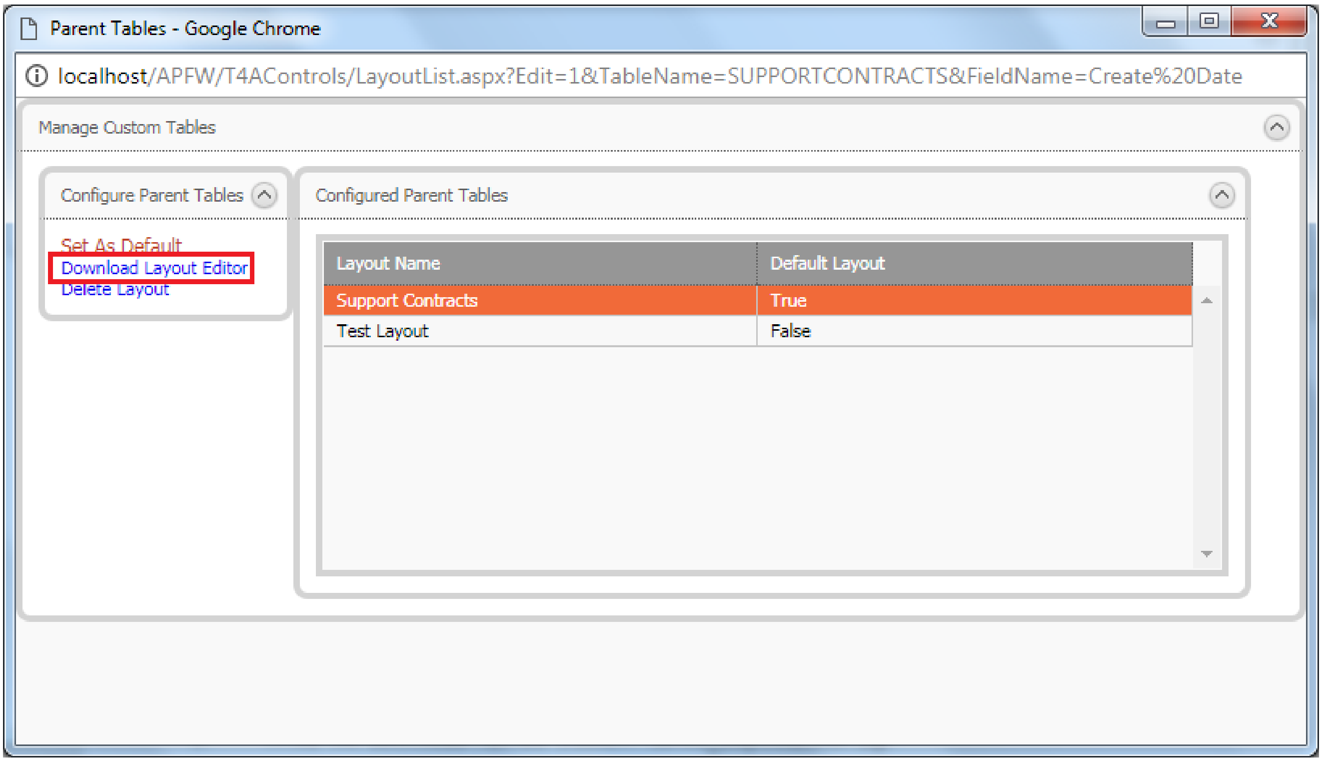
Select a table from the **Load Table** dropdown.



Under Additional Customization, click **Design Layouts**.

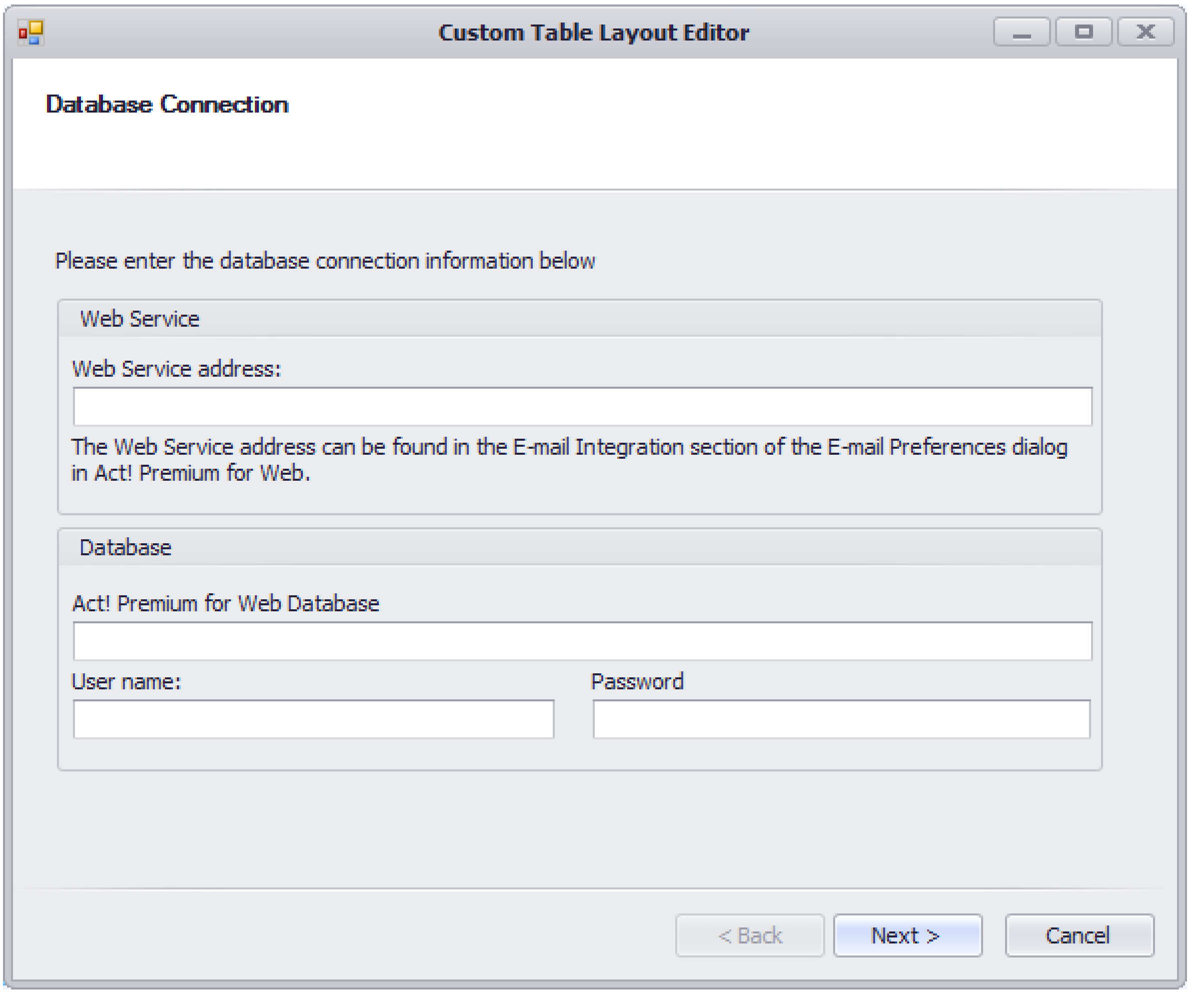


Click **Download Layout Editor**.

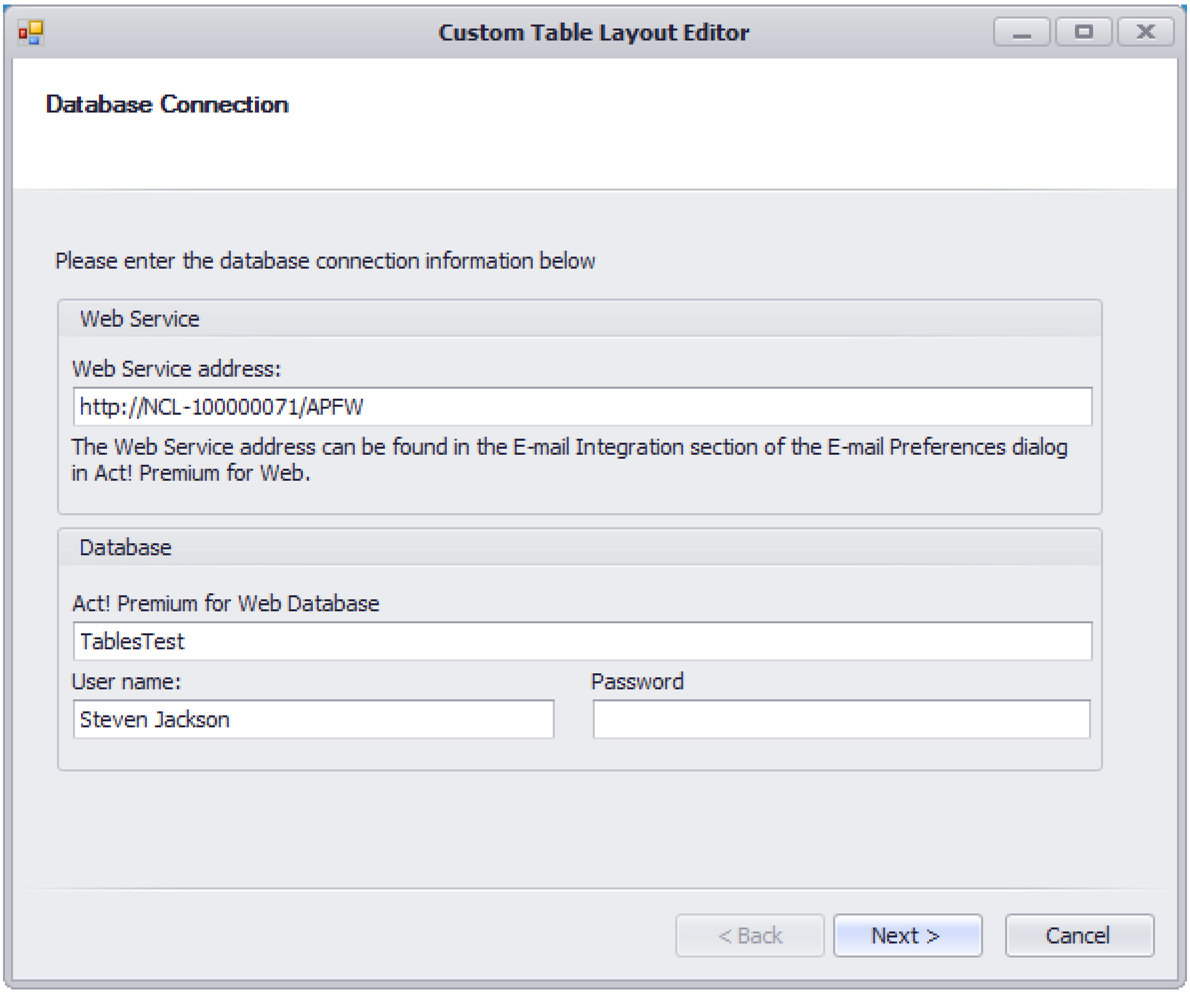


A file will download named **CustomTables_LayoutEditor.zip**. Unzip the file to a new folder, and run the **CustomTables_LayoutDesigner.exe**.

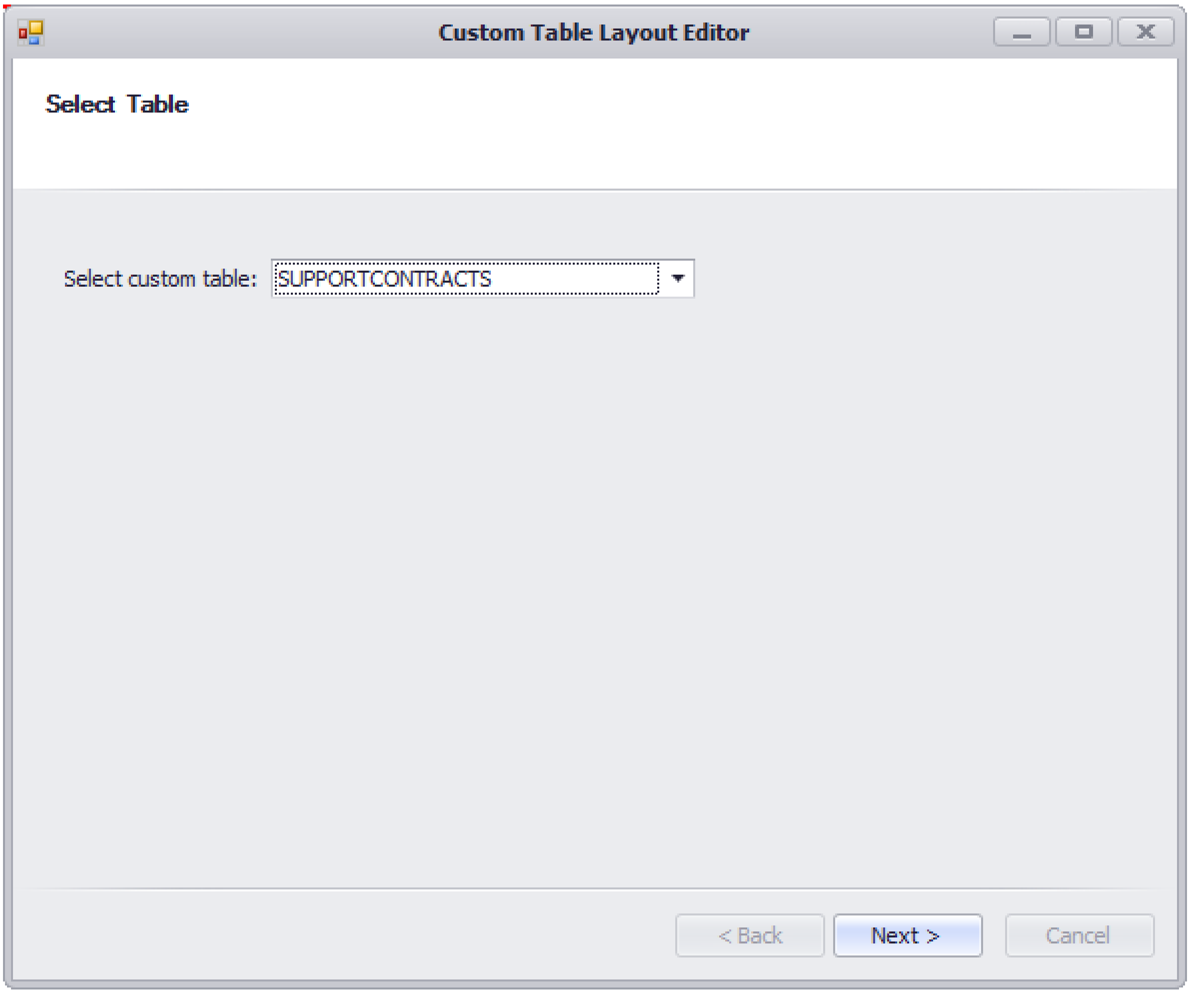
NOTE: You **MUST** unzip the file to a new folder. If you just double-click the zip file and try running the .exe file, it will not work.



Enter the **Web Service address**, along with the **Database name**, **User name** and **Password**. The Web Service Address can be found from **Tools** > **Preference** > **Email**, then selecting the **click here** link under E-mail Integration.

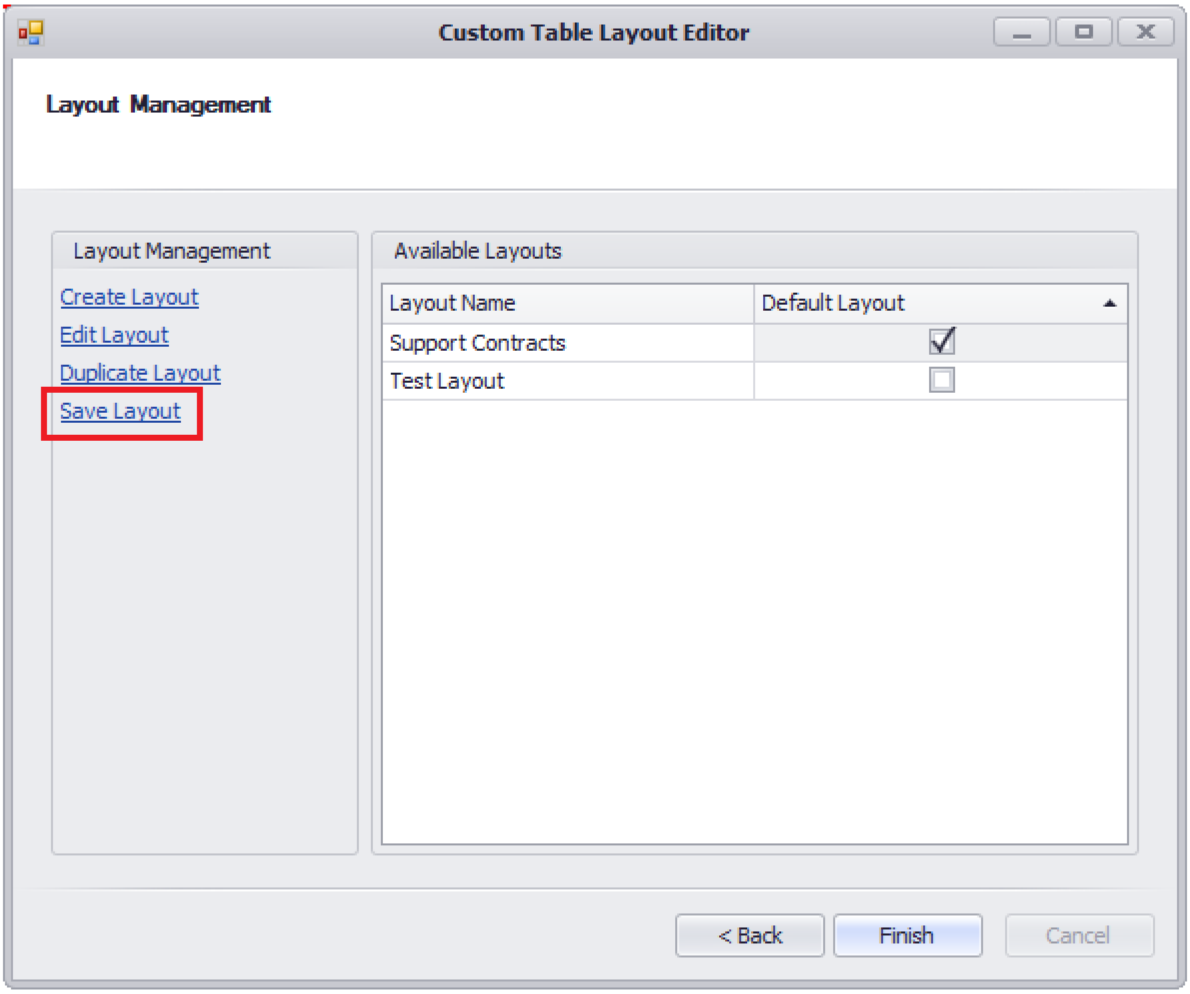


Click **Next**, then select a **Custom Table**.



Click **Next** again. The **Design Layout** process now works just as it does from the Act! desktop client.

After creating or editing a layout, click **Save Layout** under the **Layout Management** screen to pass these changes to the web client.



Keep the downloaded CustomTables_LayoutDesigner.exe file if you wish to quickly create or edit layout files in the future.

Exercise

Create a **layout** for your **Support Contracts** Custom Table. Make sure to add the **Contacts, Companies, Start Date** and **End Date** fields. Set the layout as **Default**.

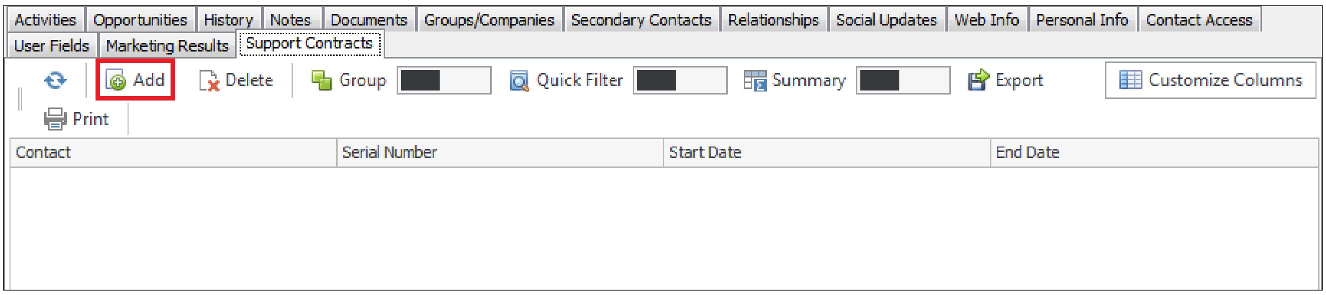
Create a second layout using the **Web version** of Act!.

Working with Custom Tables

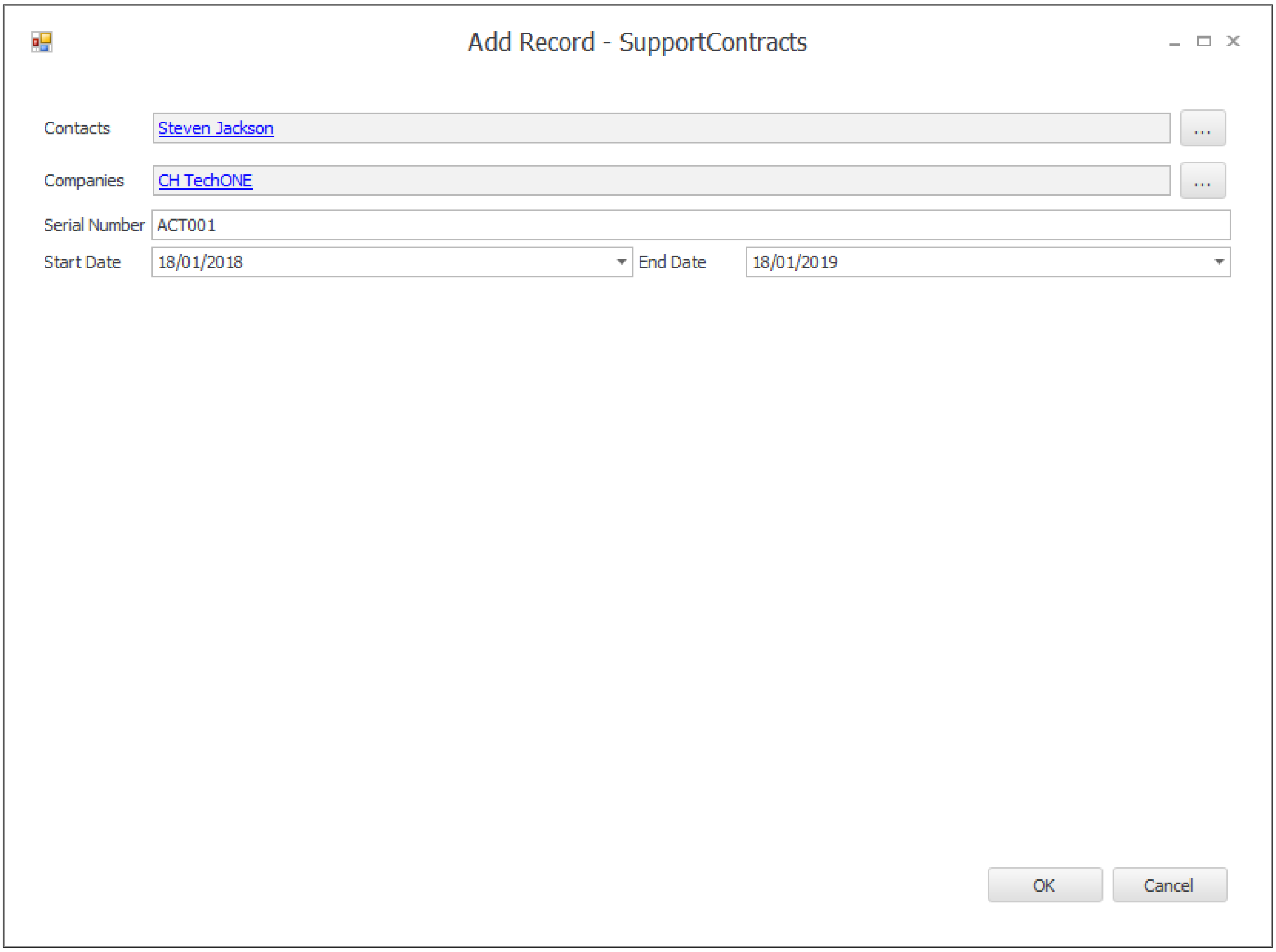
Now that we have created a Custom Table, set the default columns and created a Layout, we can now begin to actually use the Custom Table. By showing an example of this in use we will begin to see how powerful this new feature really is.

Adding Values

To begin, we will enter a contact record and open up our **Support Contracts tab**, then we need to click the **Add** button. Note that an additional custom field called **Serial Number** has been created, added to our columns, and added to the layout as well.

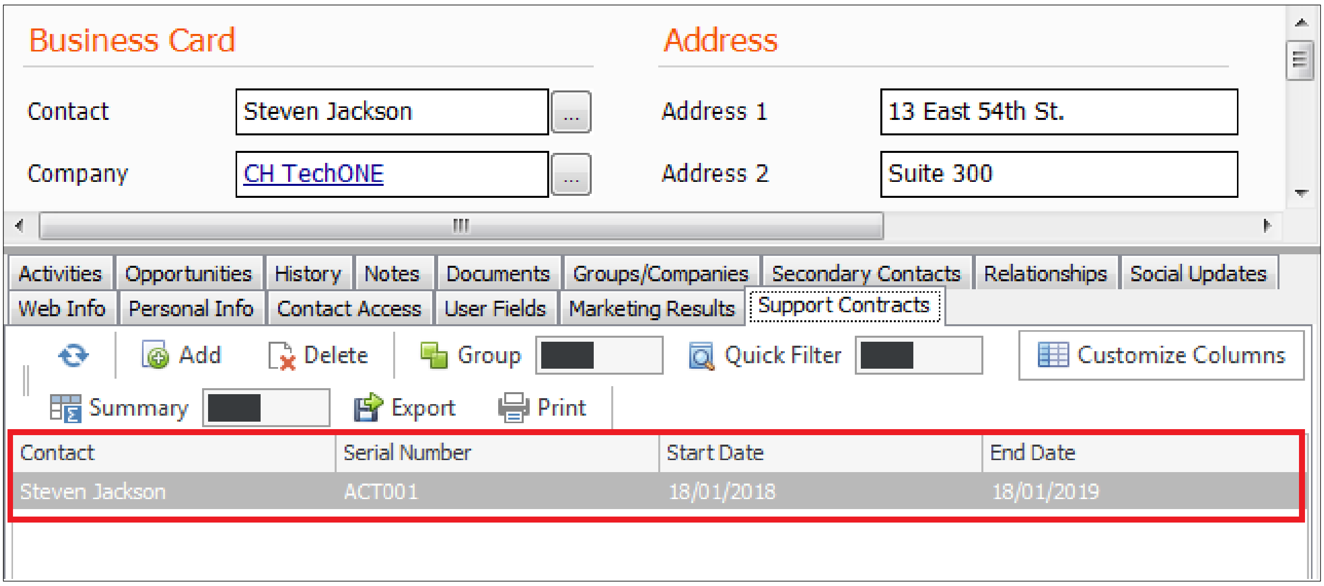


After clicking **Add** this is where we can see the **Layout** that we created earlier and this allows us to actually add values into our Custom Table.

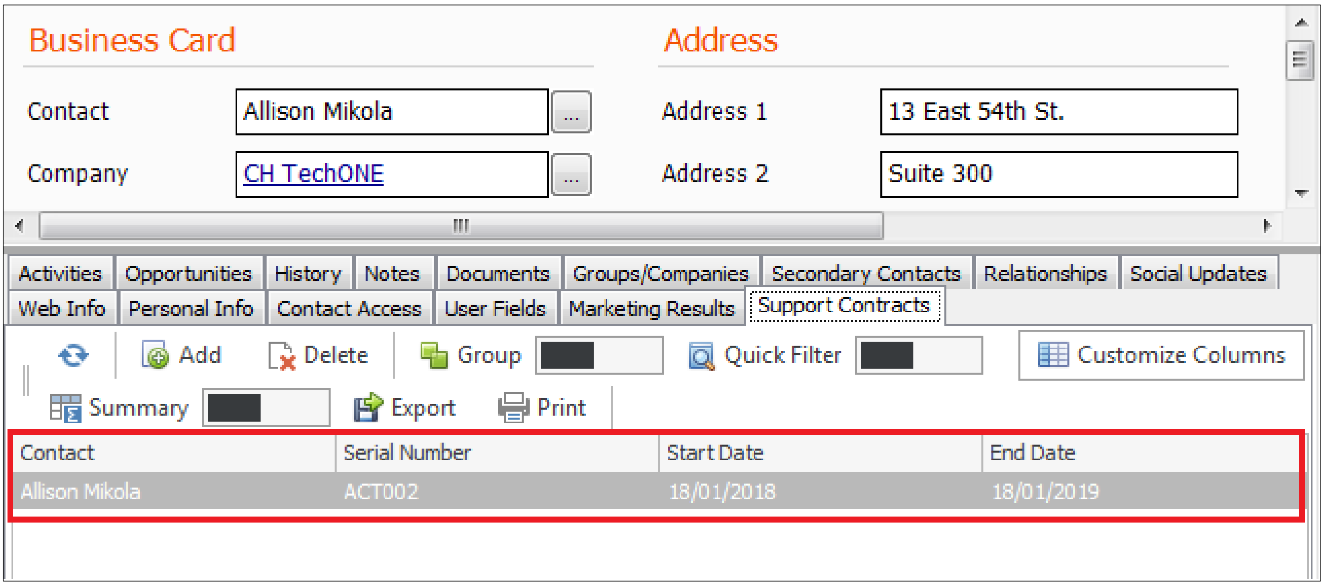


In the example above, the **Contacts** and **Companies** fields were already completed; they were pulled automatically from the Contact record. This will happen provided that the Contact record is linked to a Company, otherwise only the Contact field will automatically populate.

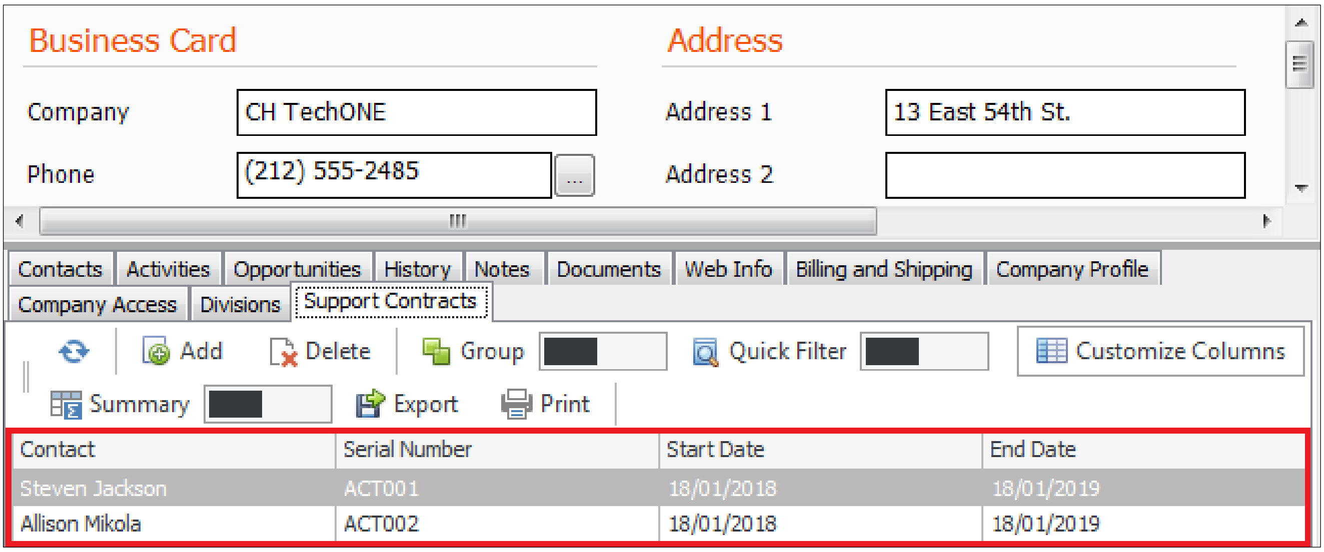
Once we have entered appropriate values we can click **OK** which will add this line to the Support Contracts tab for this individual Contact record.



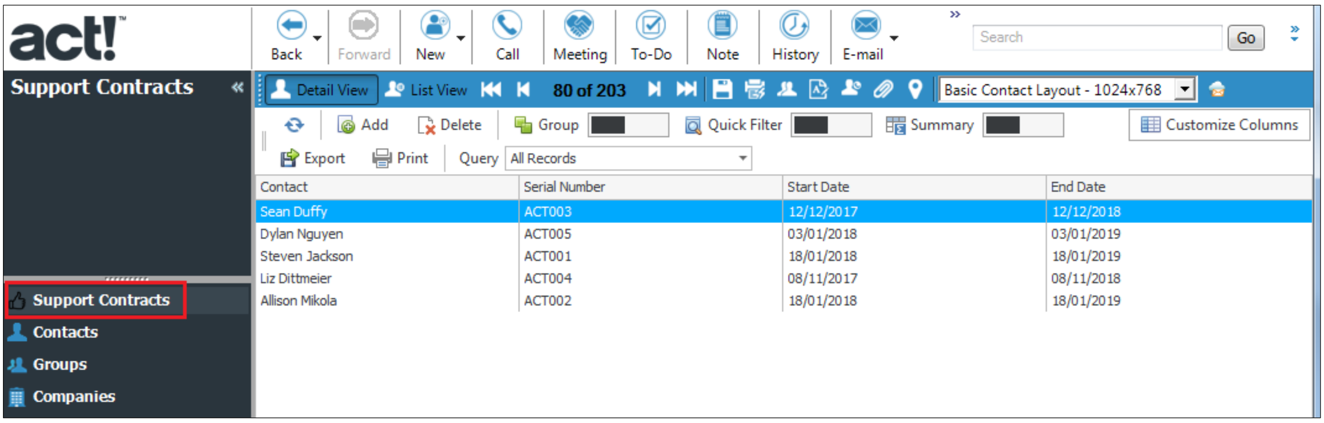
We can now fill in this tab for other Contact records too.



If we now take a look at the Company record for **CH TechONE** (remember when we created this Custom Table we chose to show it as a tab in Companies and chose to link the **Companies entity** to it), we can see that both contracts from the above screenshots are listed in that tab.



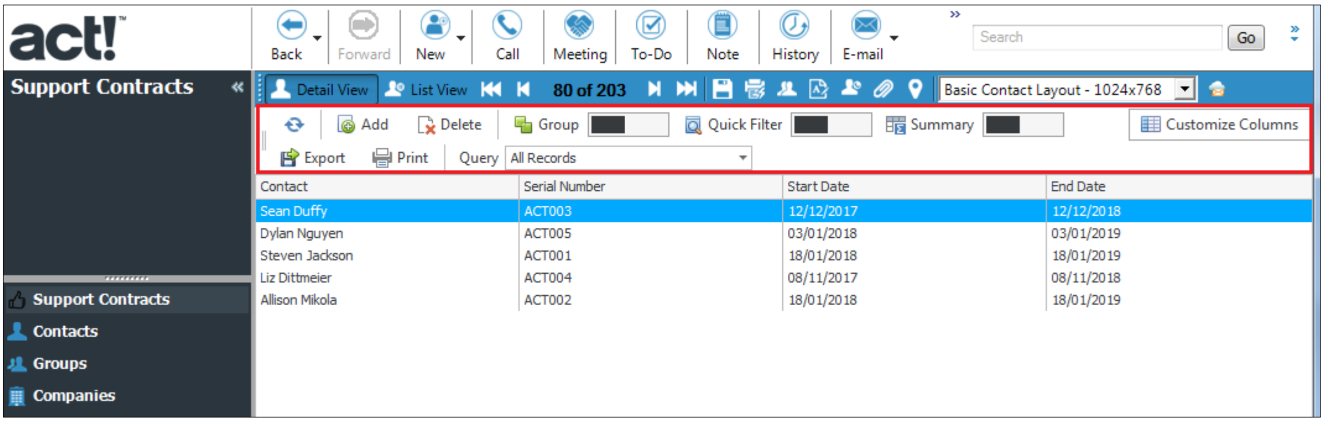
Finally, if we go to the **Support Contracts** section in the **navigation stackbar** (remember that when creating the Custom Table we made sure to show it in the stackbar) we can see all of the values we have added in here as well.



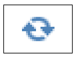
This works much like the History List in Act! in that it lists all of the Support Contracts that have been added across the whole database. The list can be **Sorted** by clicking on any of the column headers.

Custom Tables Functionality

When using Custom Tables as a tab or as an option in the navigation stackbar, there are a number of buttons that run along the top of the view.



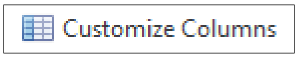
We will discuss the functionality of the simple buttons now, then cover the more complex buttons further below.



This button refreshes the Custom Tables view. You may need to use this if you add values into Contact tabs and they don't immediately appear.

This button allows you to add values into your Custom Table. After clicking **Add**, you will be presented with the **Layout** you created earlier allowing you to add the required values.

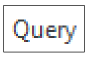
This button allows you to delete records from your Custom Table. After clicking the button you will be prompted to confirm that you wish to delete the selected records.



This button allows you to customize the columns you wish to display within your Custom Table.

This button allows you to export the listed data as either an **Excel** file or a **.CSV** file.

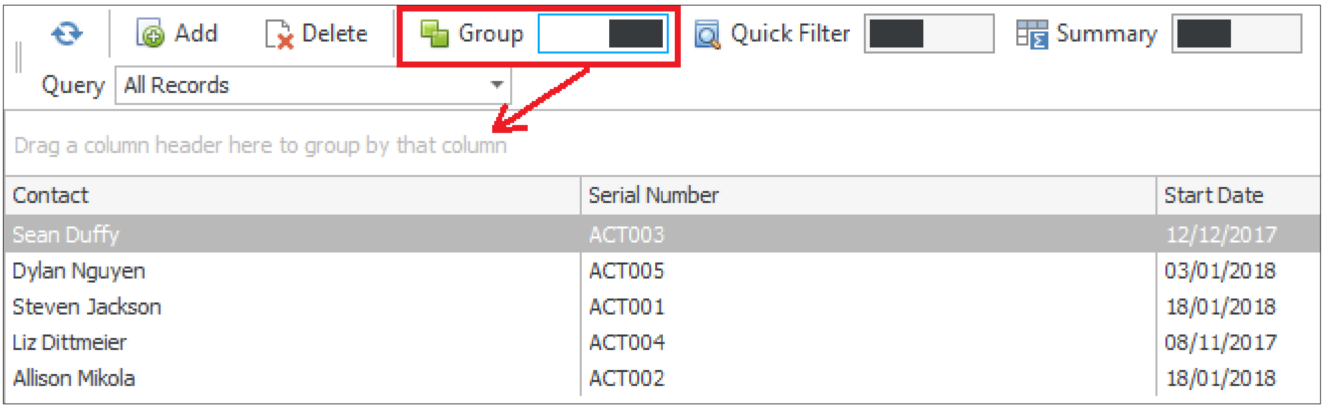
This button allows you to print the listed data.



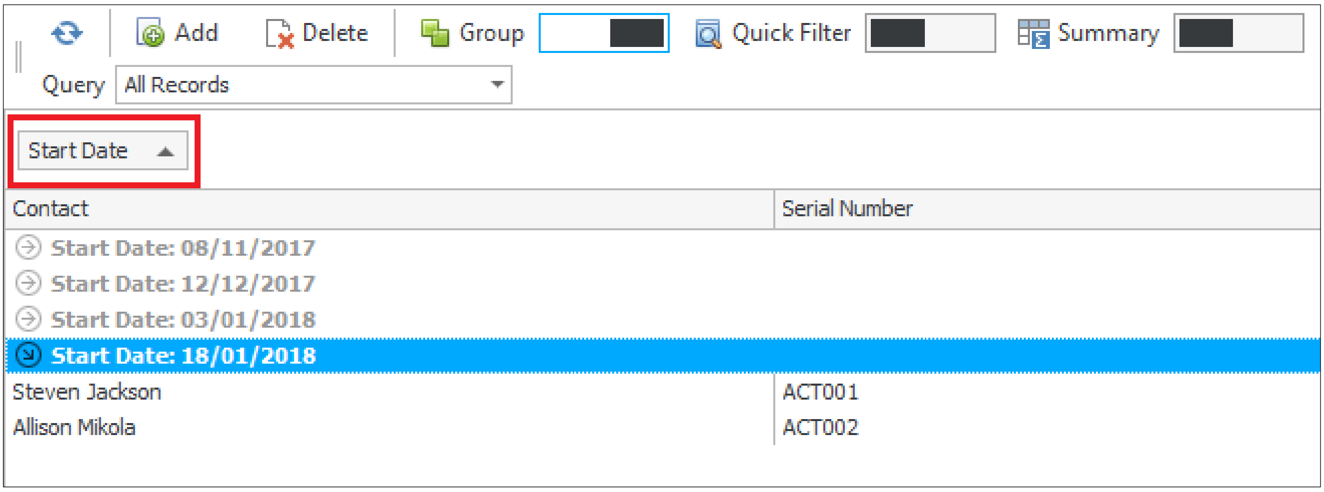
This dropdown allows you to narrow the listed data by running a query (think of this like a saved lookup). We will look at creating queries later in the training.

Group

The **Group** icon allows you to quickly and easily group together similar entries in your Custom Table. Clicking the icon switches this function on.

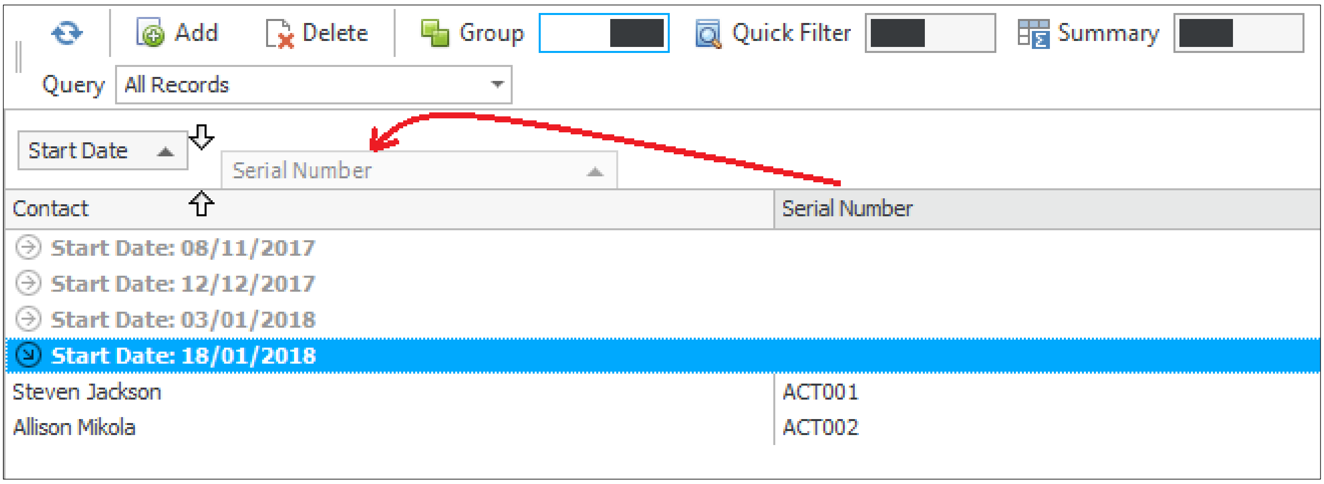


To group your records together, simply drag and drop one of your column headers into the new space highlighted above. In this case we will group by **Start Date**.

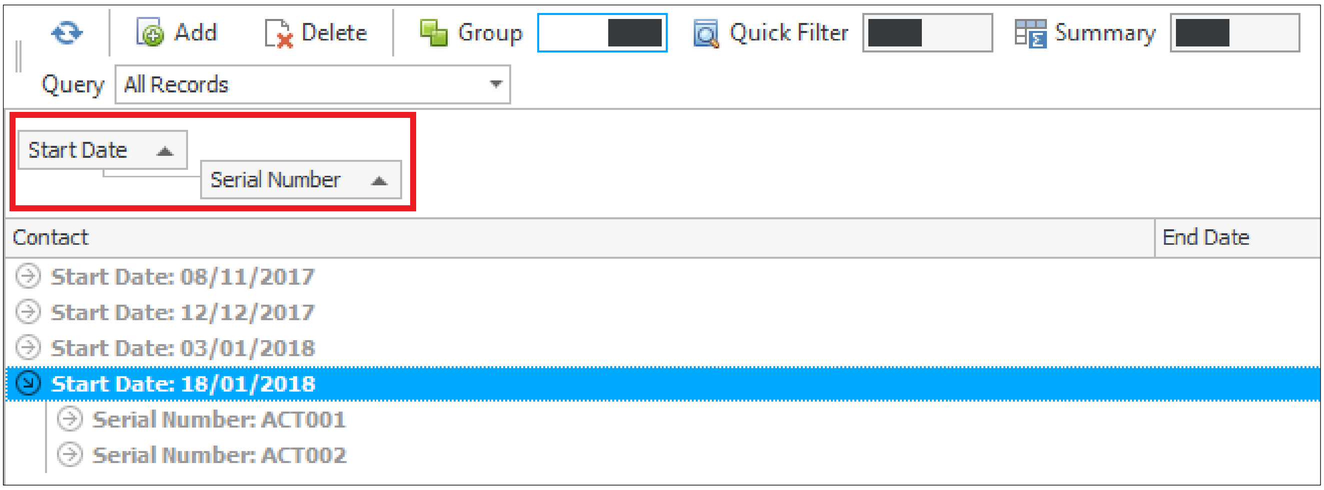


As you can see, each record is now grouped by their Start Date. Clicking on the **Arrow** to the left of the start dates expands group and you can then see the individual records within it as per the bottom record on the screenshot.

If you want to add further filters to the group, you can drag and drop other column headers into the group section as well. So if we imagine we want to group by **Start Date** then by **Serial Number**, we can drag and drop the Serial Number column next to Start Date.



The results are as follows.

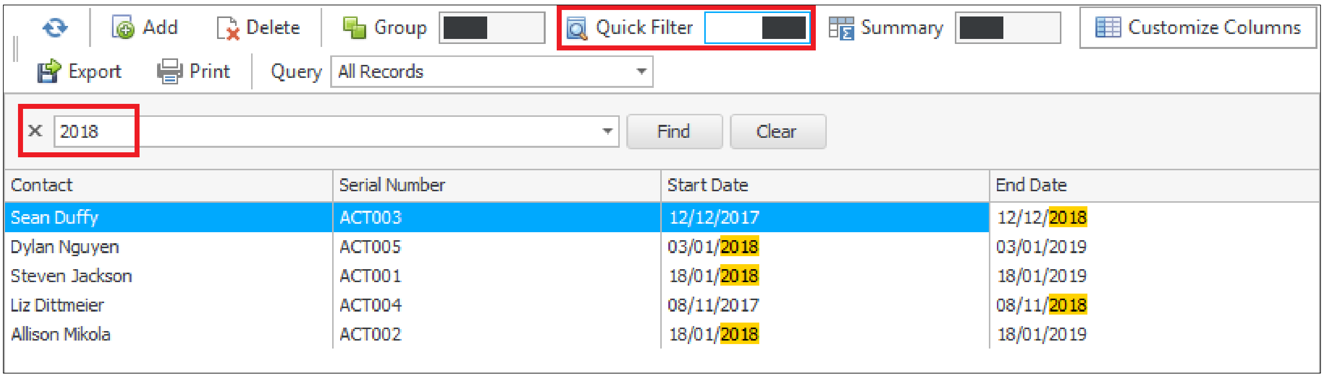


As you can see, two filters are showing in the group. Once you click the **Arrow** to expand results for the first filter (Start Date) you then get another Arrow to expand for the second filter (Serial Number).

NOTE: If you click the **Group** icon to switch it off, you will lose any groups you have set up. Switching the feature back on will mean you have to create your group again.

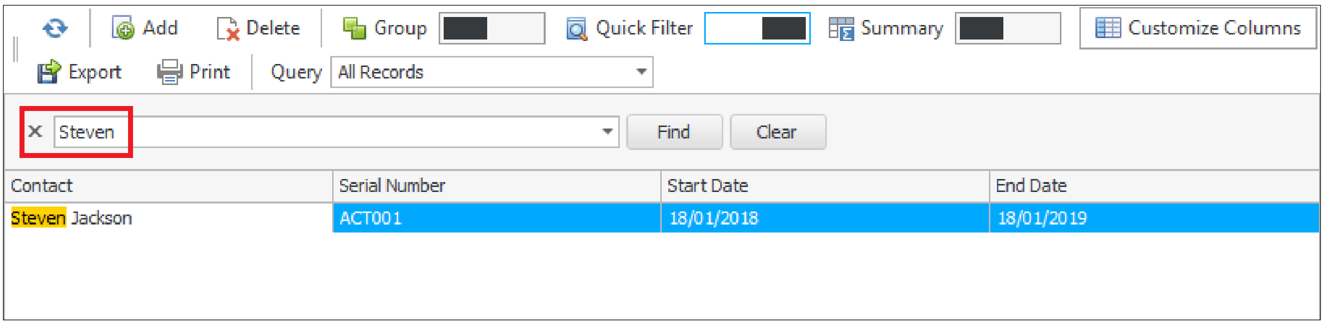
Quick Filter

Turning on the **Quick Filter** feature allows you to type in values to narrow down your Custom Table records. You can think of this as similar to the Look For feature in the Contacts section, except that Quick Filter will search multiple columns at the same idea. For example, if we switch the feature on and perform a search for **2018** we get the following results.



As you can see, performing this search has found results in multiple columns and highlights the results found.

Quick Filter will only show records that match the search performed. So for example, if we search just for **Steven** we will get far fewer results.



Clicking the **Clear** button will return you to your full list.

Exercise

Create a new field called **Serial Number** for your **Support Contracts** Custom Table. Make sure this is a Character field.

Add values into your Custom Table against **5** different Contacts. At least **2** of these should have the same **Start Date**.

Practice using the **Group** and **Quick Filter** functions.

Relating Custom Tables and Fields

Now that we have covered the basic functionality of Custom Tables, we are going to progress into the more complex features available. One such feature is the ability to relate Custom Tables and Fields to one another. The idea is that you can create multiple Custom Tables and have the records within them associate with each other.

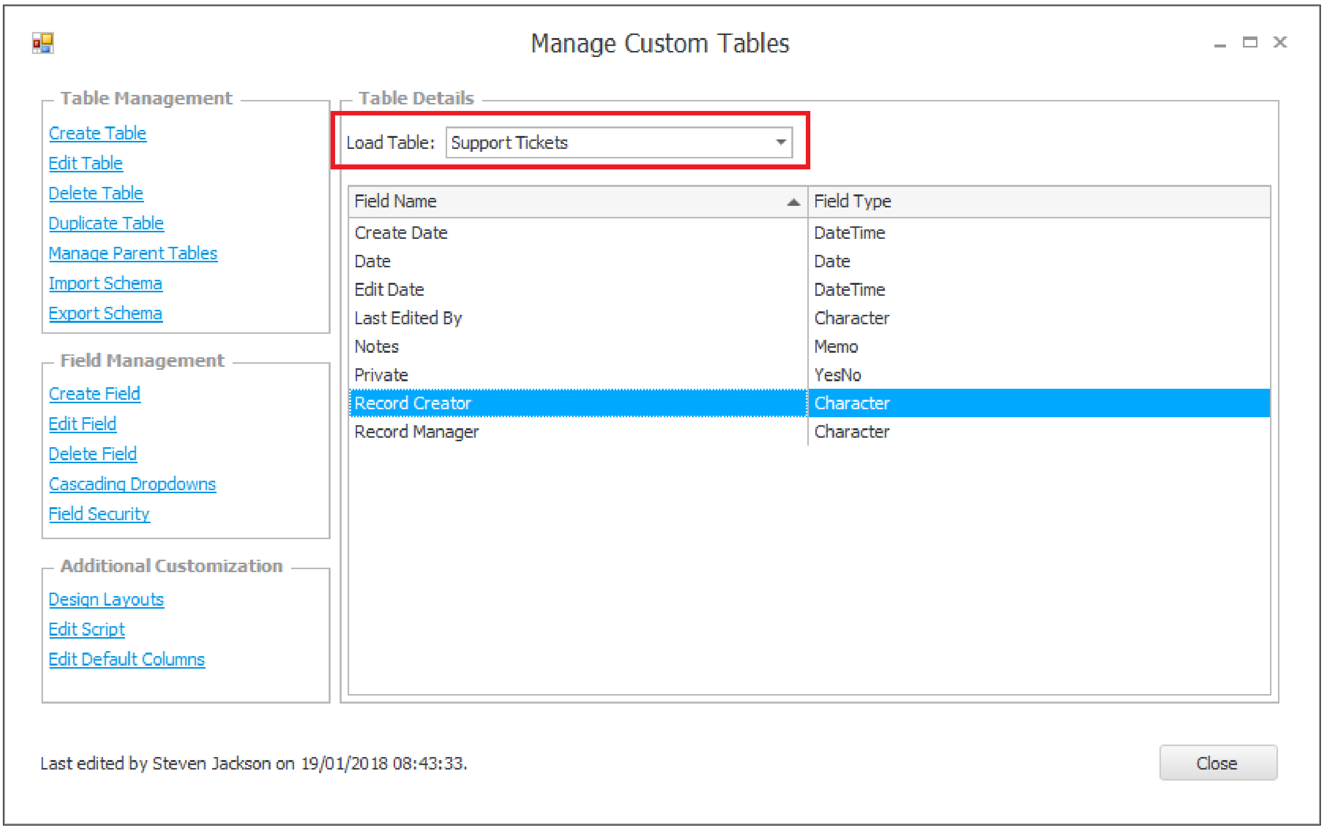
For example, if you work in a support environment you could create a Custom Table to store your customers Support Contracts. Then you could create a second Custom Table that contains Support Tickets from your customers. Finally, you could relate these tables together so that all of the Support Tickets for an individual appears underneath their Support Contract.

In this example, the Support Tickets would be in the **child** table, and Support Contracts exist in the **parent** table. We will perform an example of how this works below.

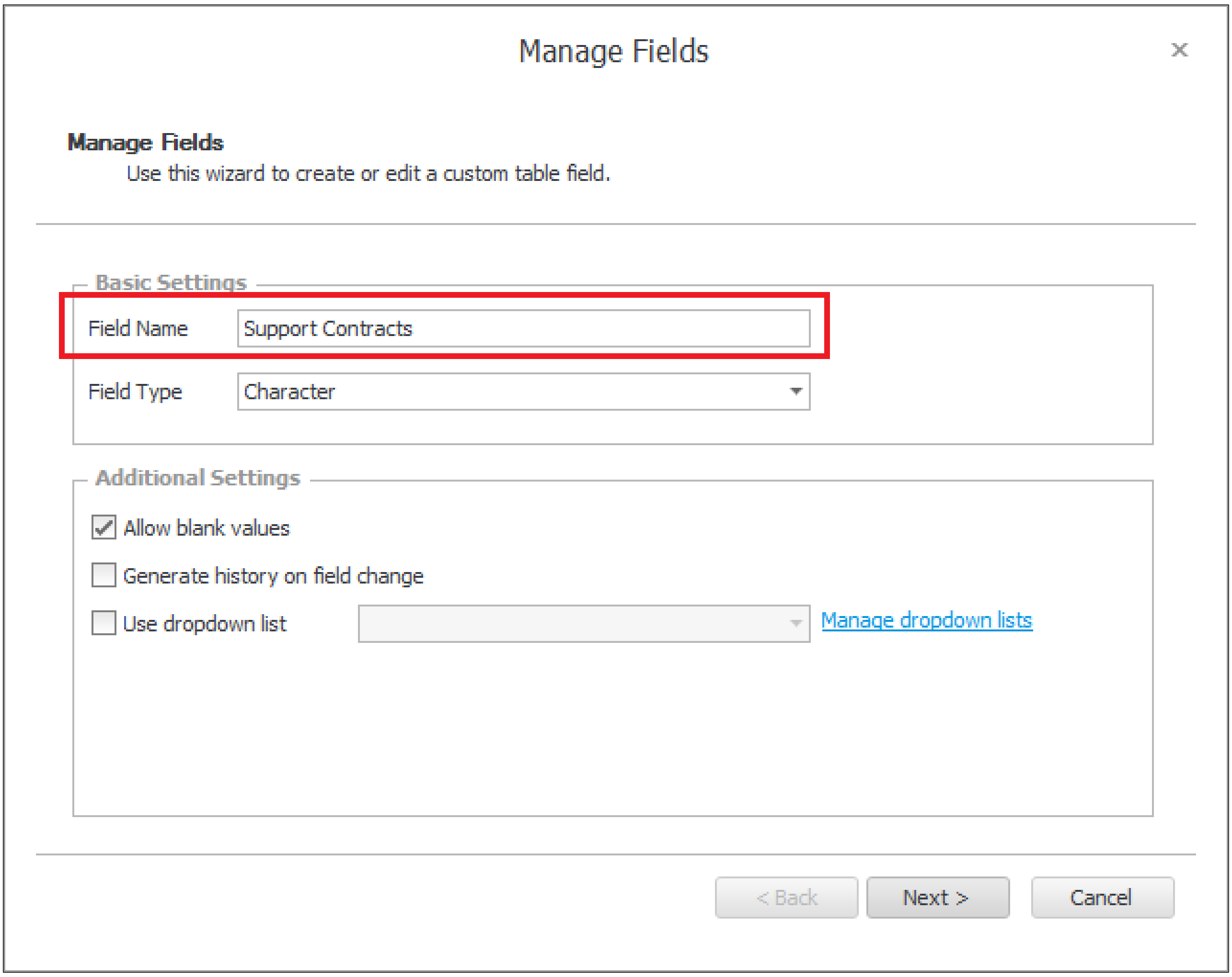
NOTE: For this example, we have created a very simple second Custom Table called **Support Tickets**. It has the custom fields **Date** and **Notes**.

Relating Custom Tables

To begin creating a relationship, click **Custom Tables** > **Manage Custom Tables**, then from the **Load Table** dropdown, select the table which will be the **CHILD** table.

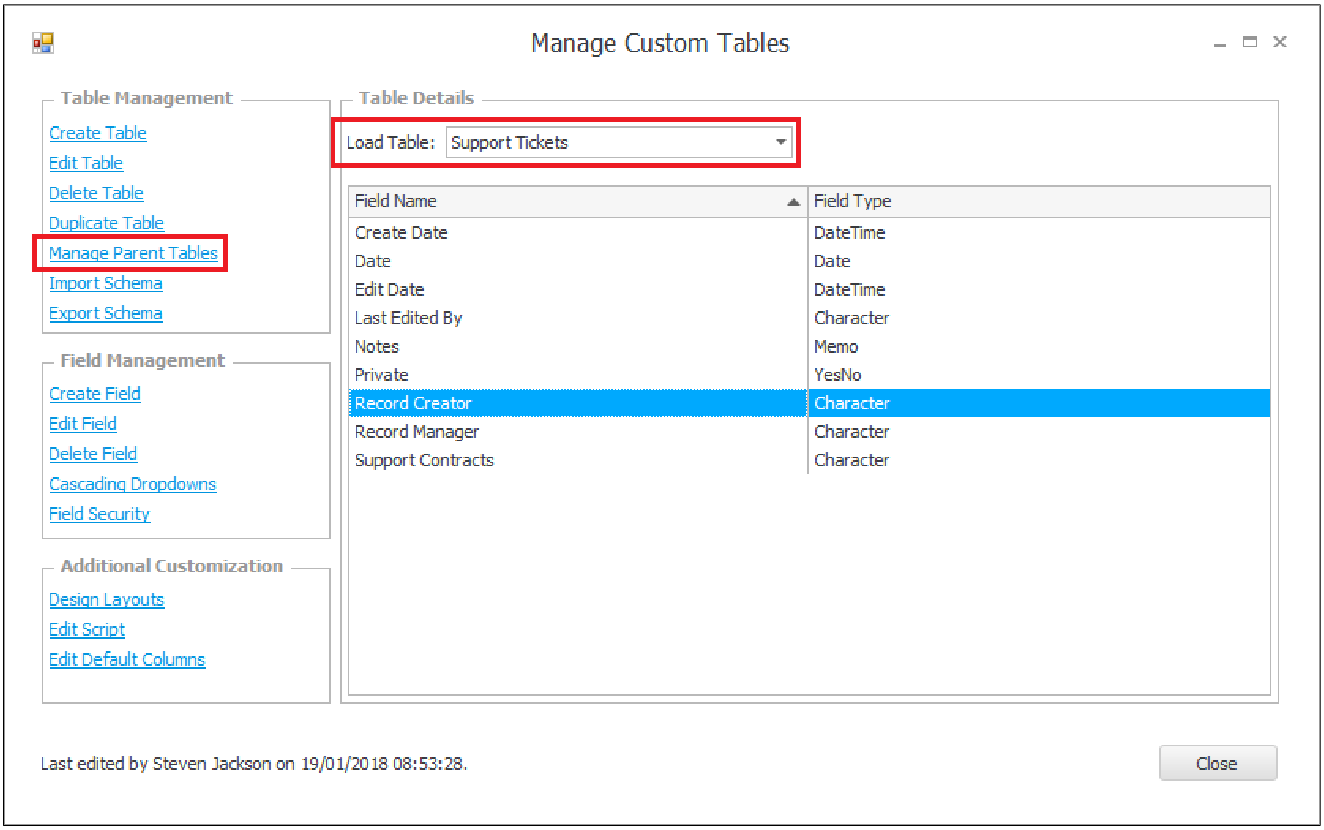


Click **Create Field**, and create a new character field in this table with at least 36 characters. This will be used to link the child and parent tables together. It is usually best to give this field the **same name as the parent table**.

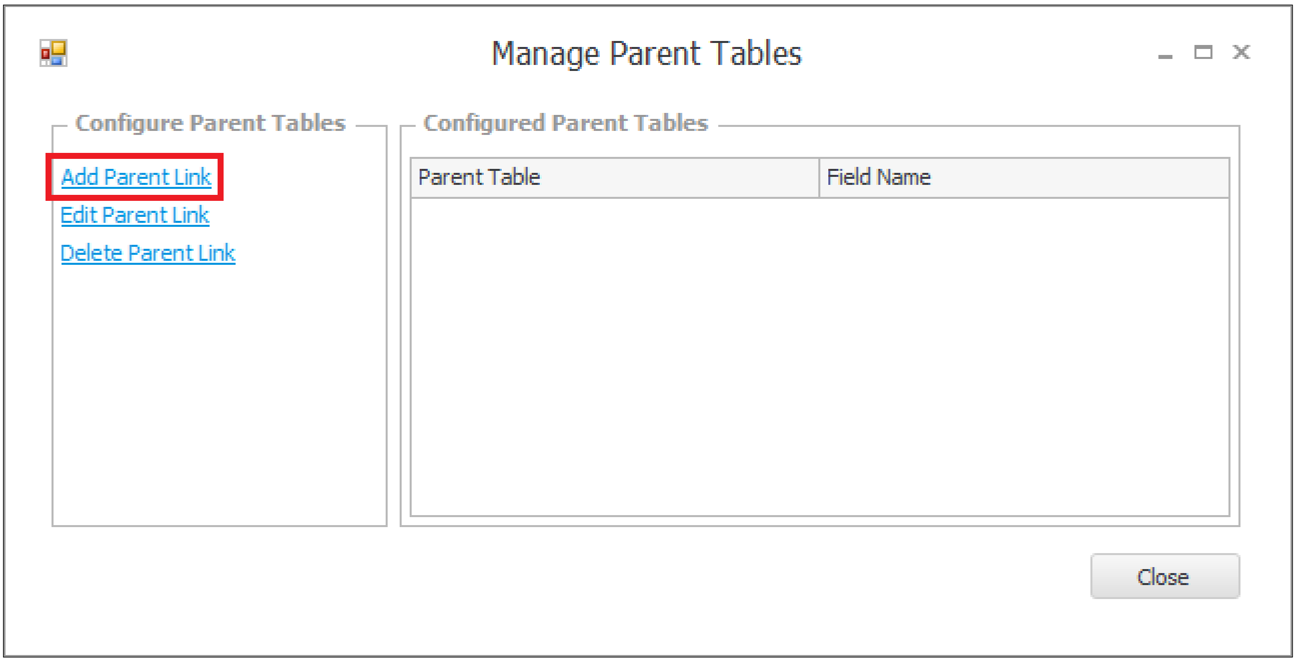


Once the field has been created, following the steps we have discussed earlier in the training, add this newly created field to the **CHILD** table layout. **This is a very important step and must not be skipped**.

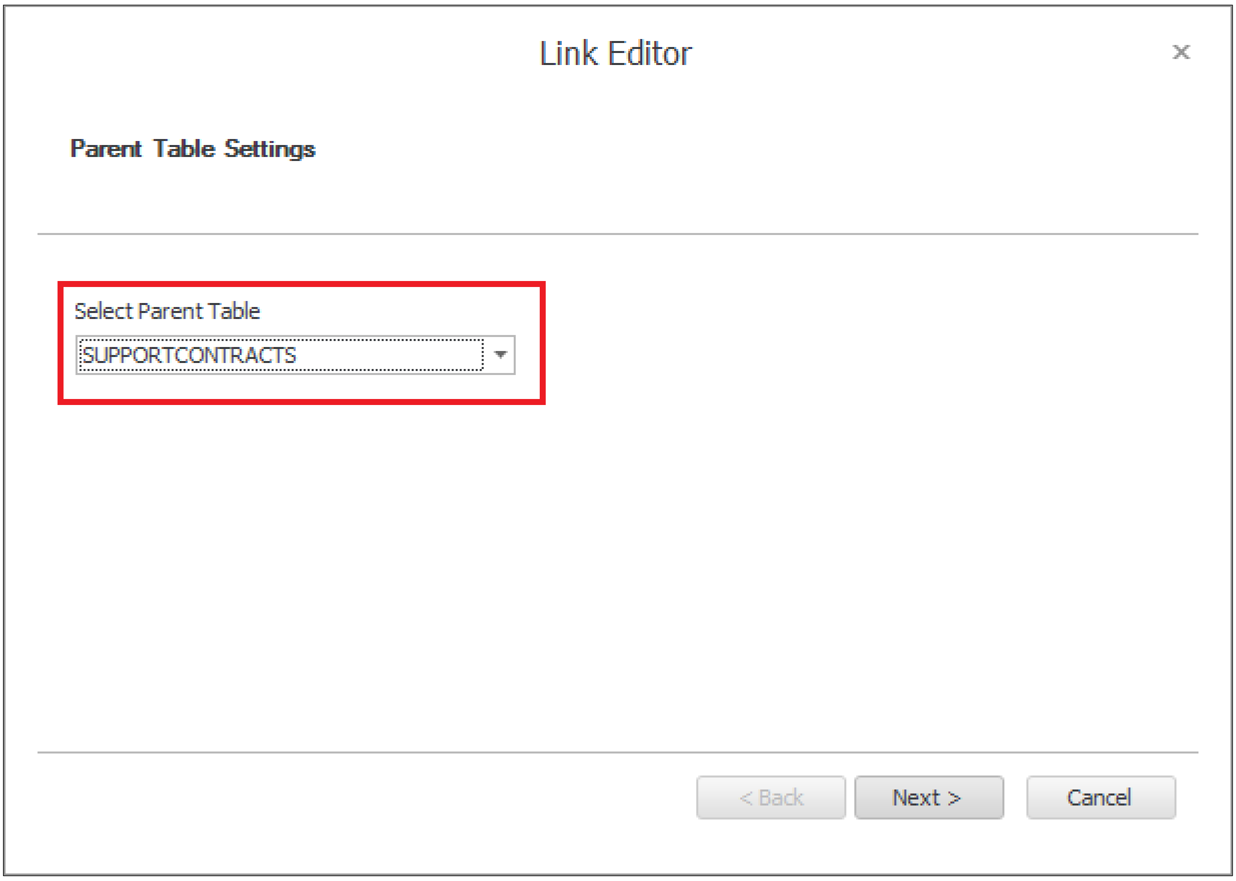
Once completed, ensure the **CHILD** table is still selected in the Load Table dropdown. Then under **Table Management**, click **Manage Parent Tables**.



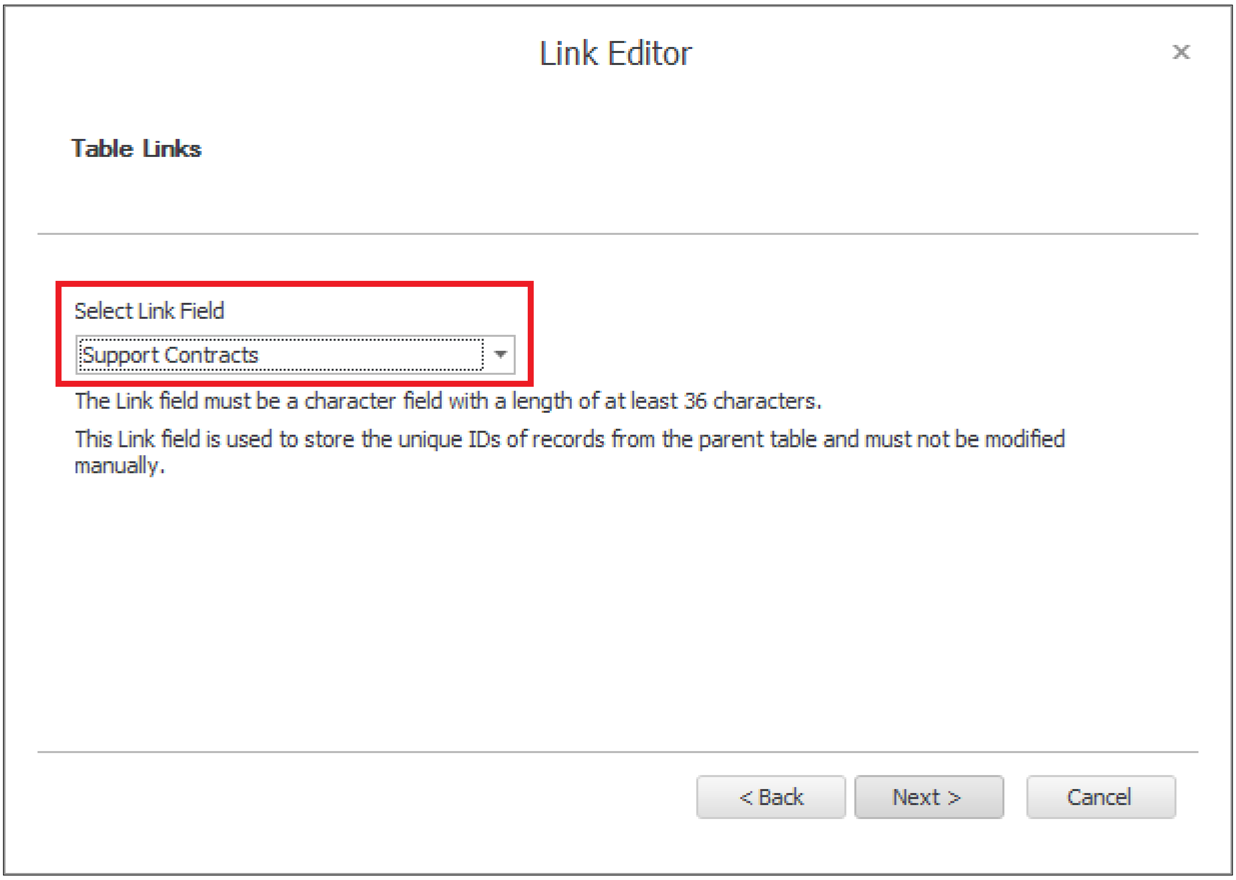
Click **Add Parent Link**.

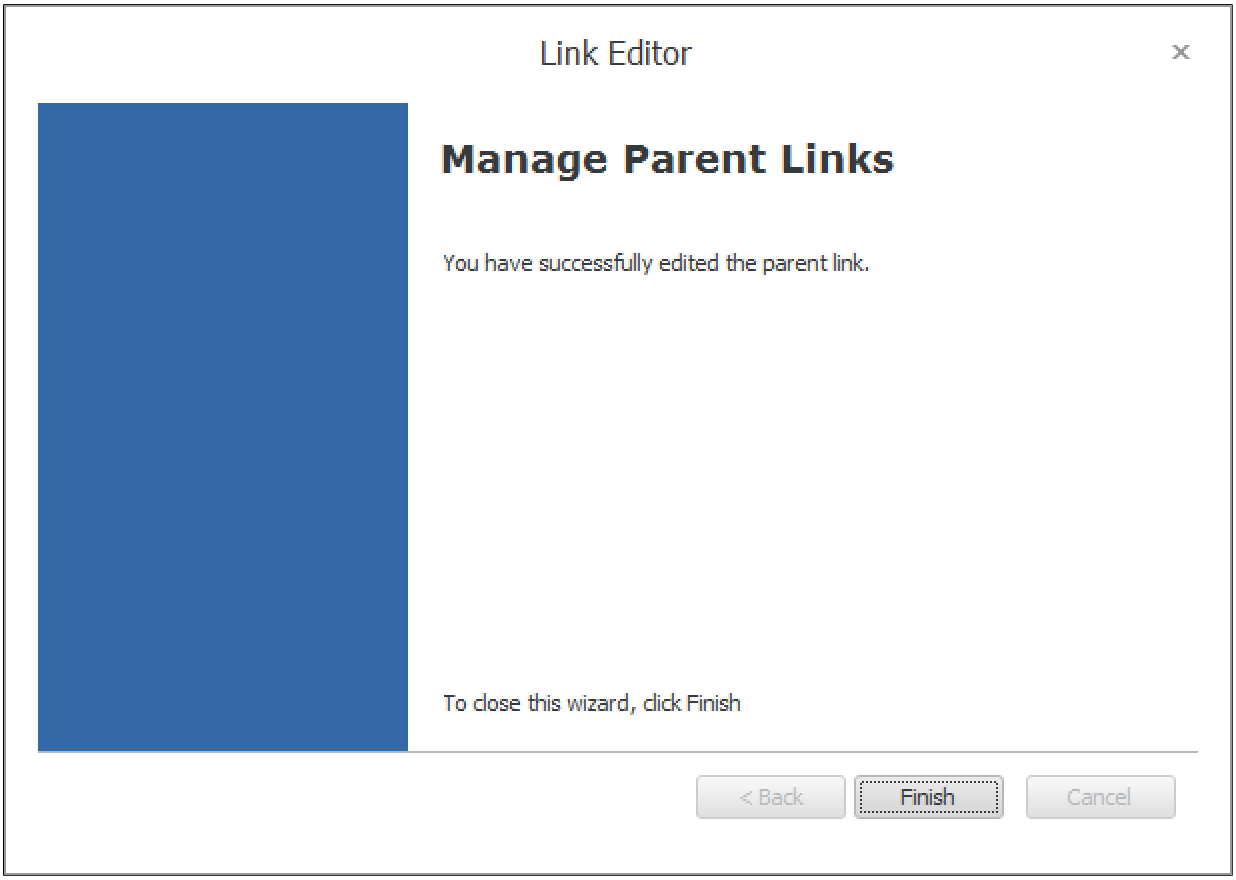


Select the **PARENT** Table from the dropdown and click **Next**.



Select the **Link Field** you just created, and click **Next** until the end of the wizard. You can then click **Finish** to create the relationship.


Link Editor
Table Links
Select Link Field
Support Contracts
The Link field must be a character field with a length of at least 36 characters.
This Link field is used to store the unique IDs of records from the parent table and must not be modified manually.
< Back
Next >
Cancel

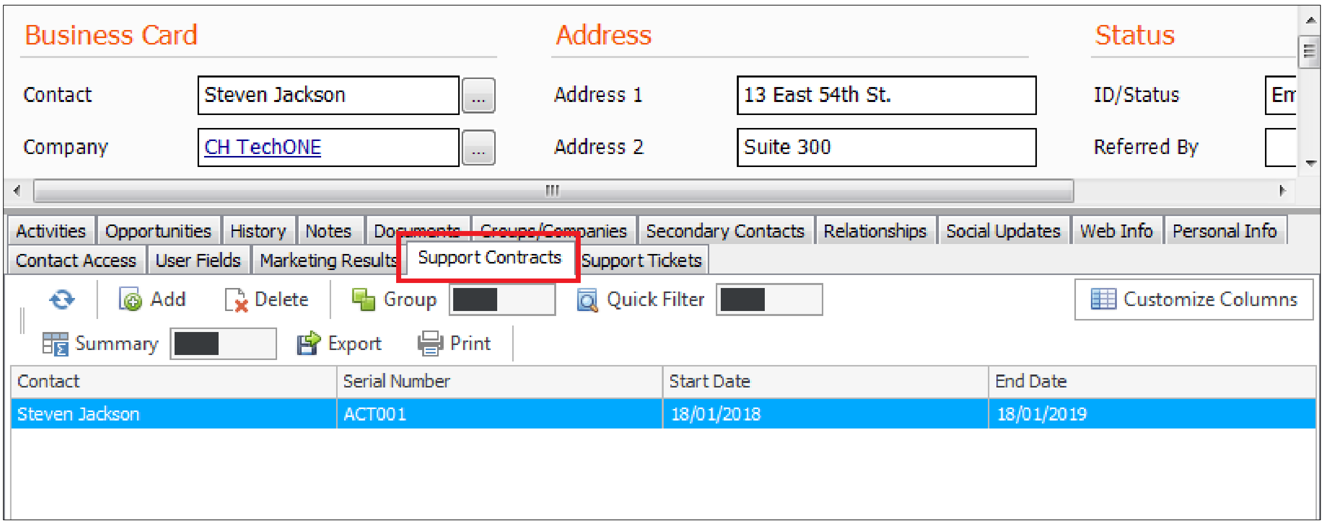

Link Editor
Manage Parent Links
You have successfully edited the parent link.
To close this wizard, click Finish
< Back
Finish
Cancel

Once the relationship is created, a new field will be available in the layout editor for the **PARENT** table. This appears in the standard format **ChildTableName Records** (so in our example this would be **SupportTickets Records**). Once added to the layout, this will display a list of all linked child records. We will go through an example of how this works in practice below.

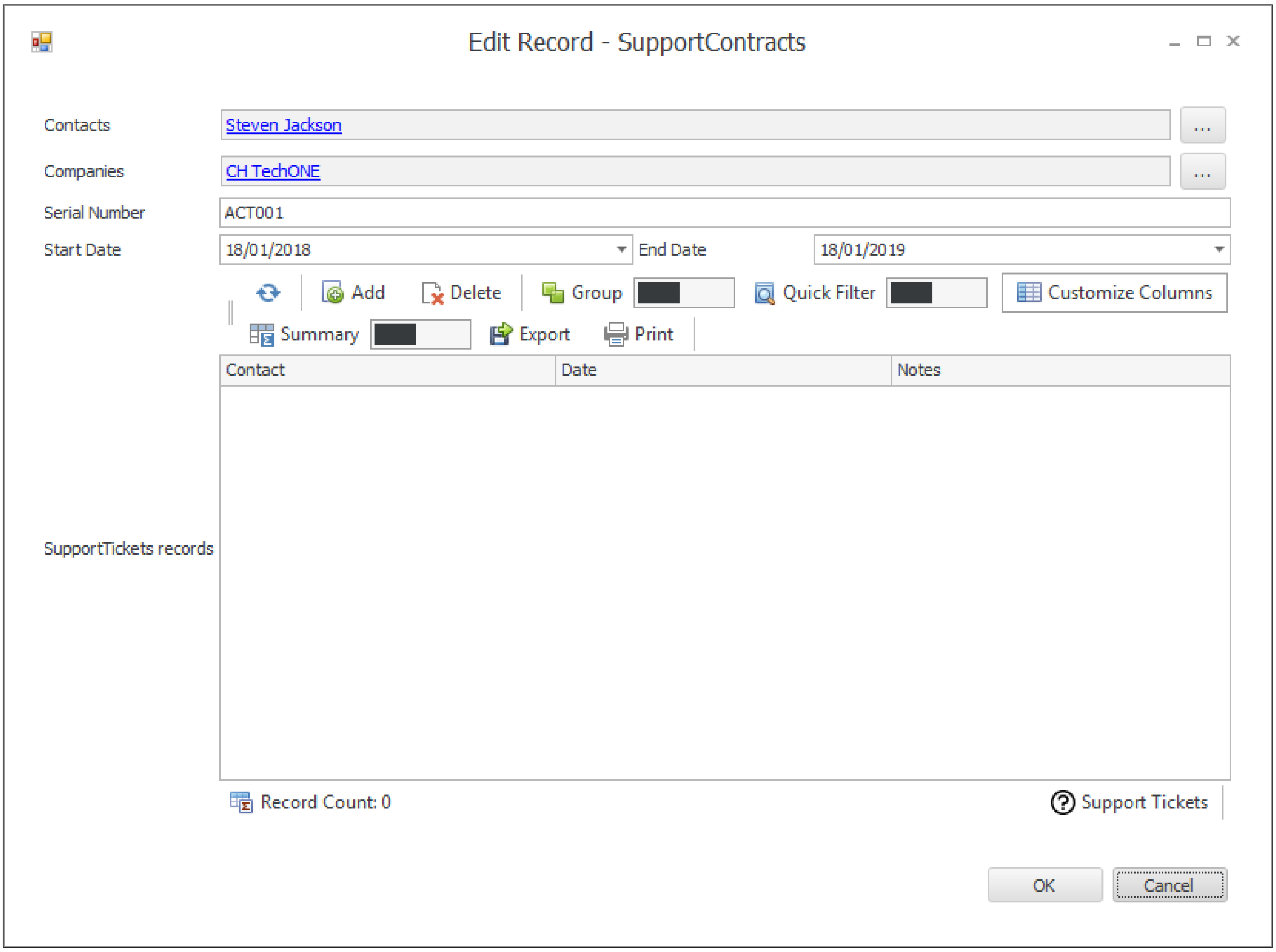
Working with Related Tables

In the example above we looked at how to relate two Custom Tables together, **Support Contracts** (the **PARENT** table) and **Support Tickets** (the **CHILD** table). Now that this relationship is in place, we need to see how this relationship actually works in the program.

As an example, let's take a look at a Contact record who has a **Support Contract**.

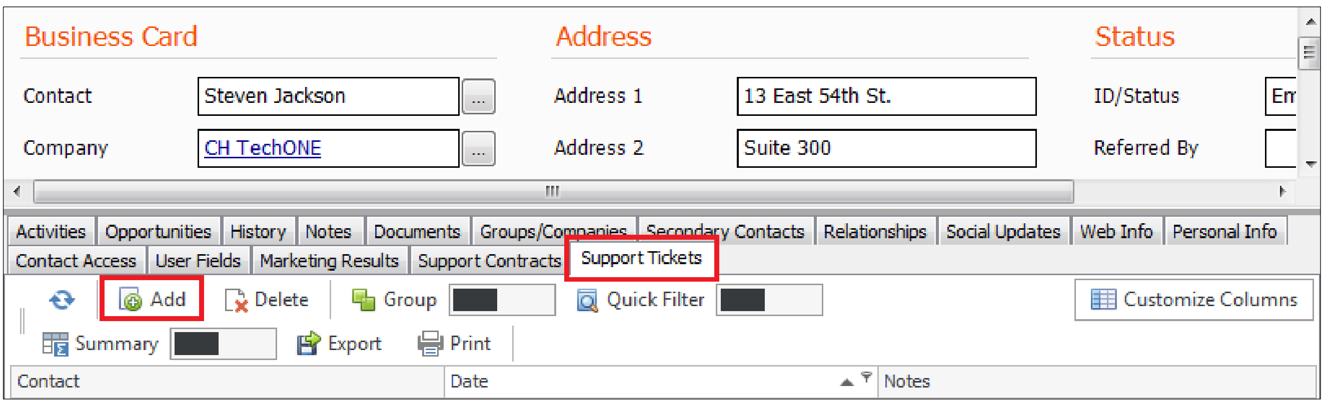


If we now **double-click** on the Support Contract record, it will open up like so.



Notice that there is now a large section for the linked **Support Tickets** table. However as it stands there are no records listed. This is because the individual contact we are looking at does not have any records in the Support Tickets Custom Table. Let's look at adding some records now.

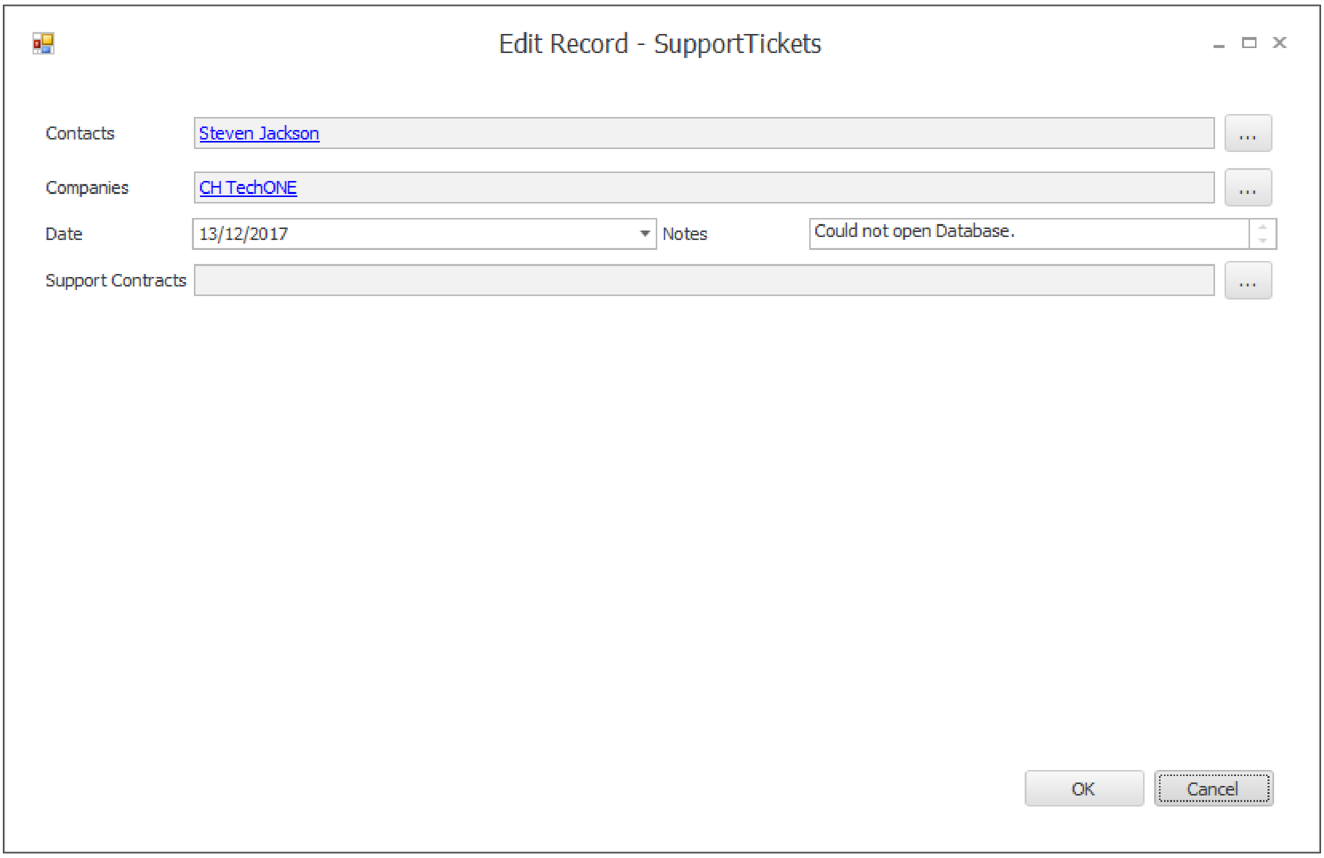
To do this, we're going to click on the **Support Tickets** tab in the Contact record, then click the **Add** button.



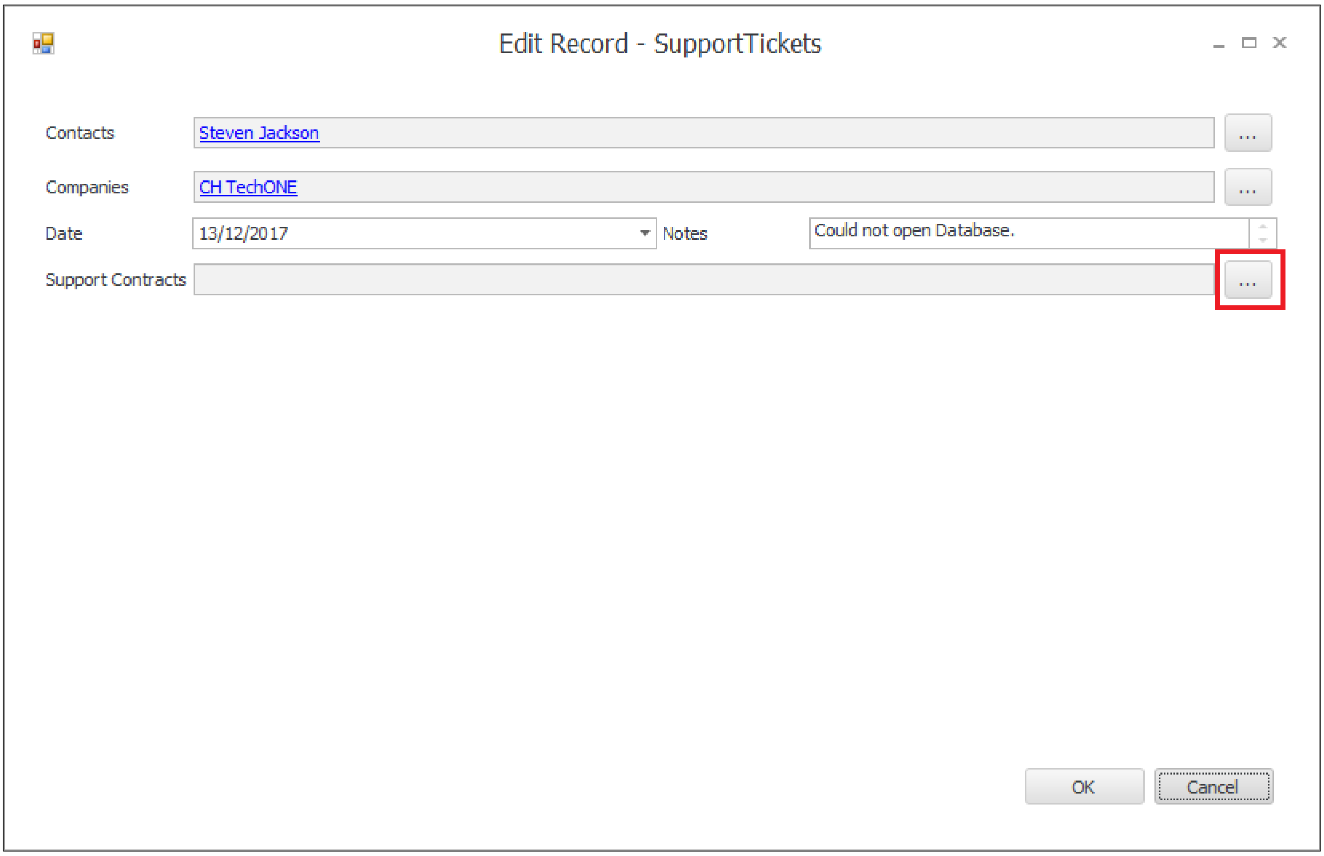
As you can see in the example below, we are using a very simple layout for this Custom Table. We have the **Date** field, the **Notes** field, and crucially, we also have the **Support Contracts** field.

Remember when we linked the tables together we had to create a new field for the child table. This field needed to have the same name as the parent table, and then needed to be added to the layout. This was a crucial step as it allows us to link the records now.

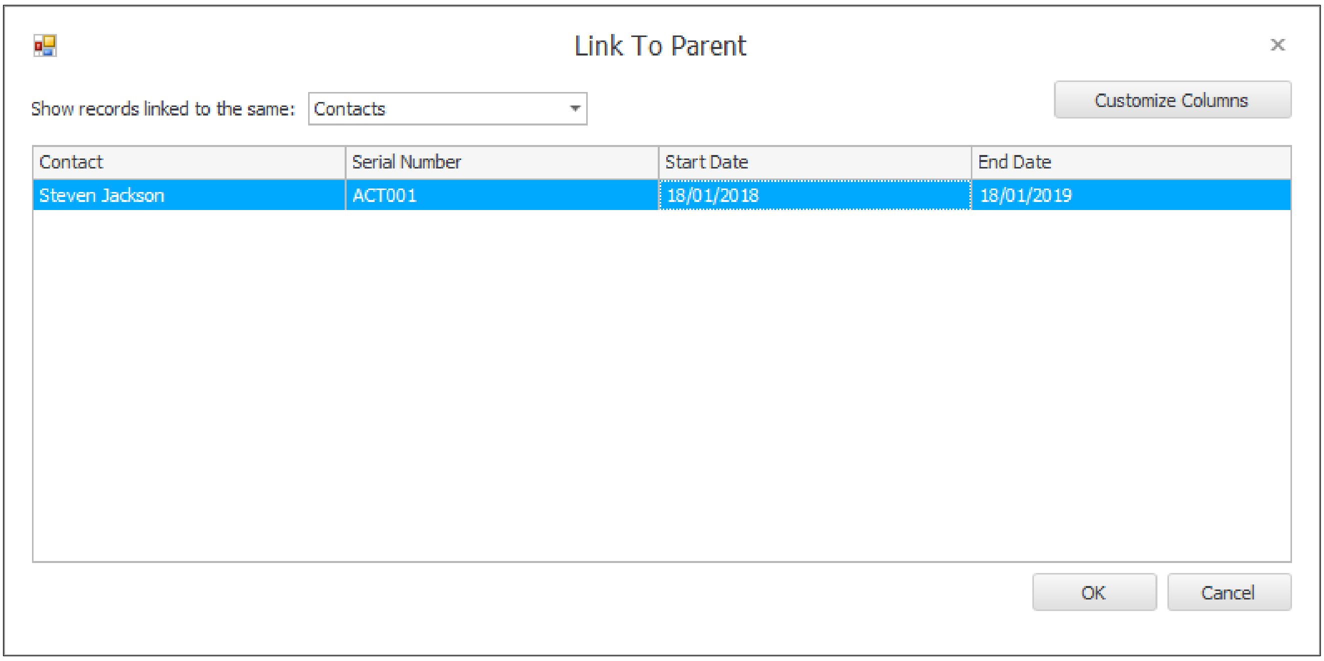
We will complete the **Date** and **Notes** fields with some dummy information.



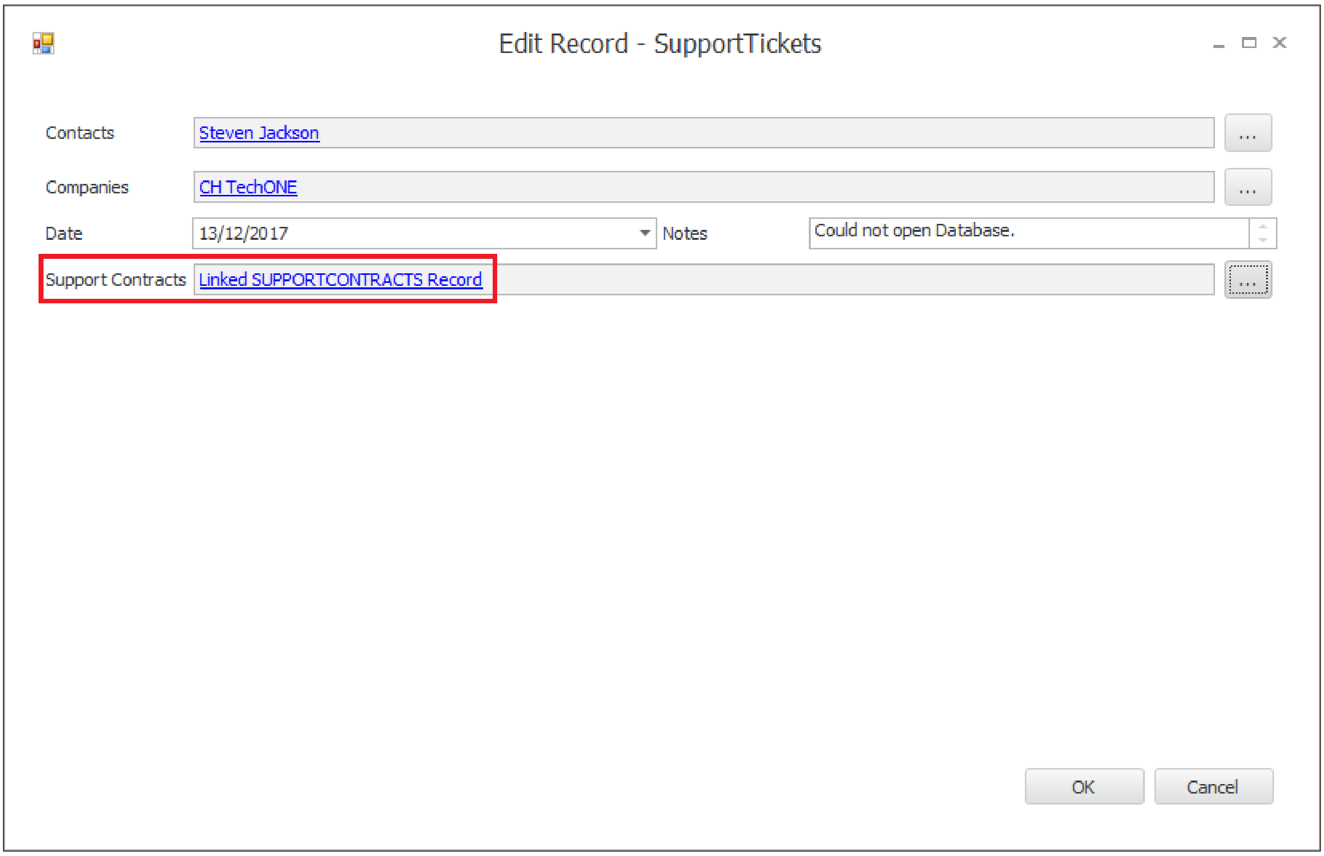
Now in order to link this Support Ticket to the Support Contract, click on the ellipsis on the end of the **Support Contracts** field.



This will show you **Support Contract** records linked to the same Contact. Whilst you can change the dropdown to find other Support Contracts from other Act! records if necessary, in the majority of cases this should not be necessary.

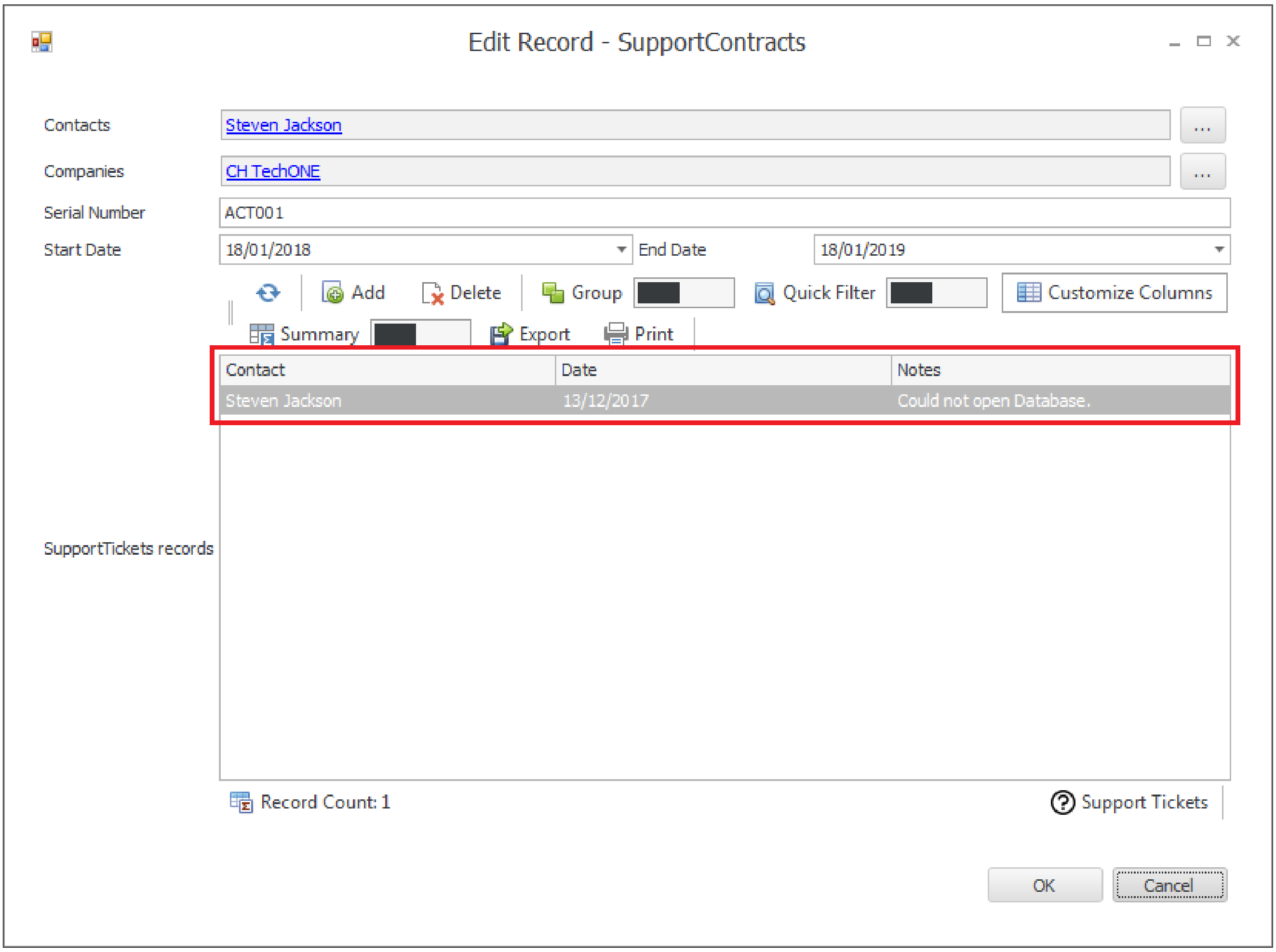


Once you click **OK** you will be able to see the linked record listed.

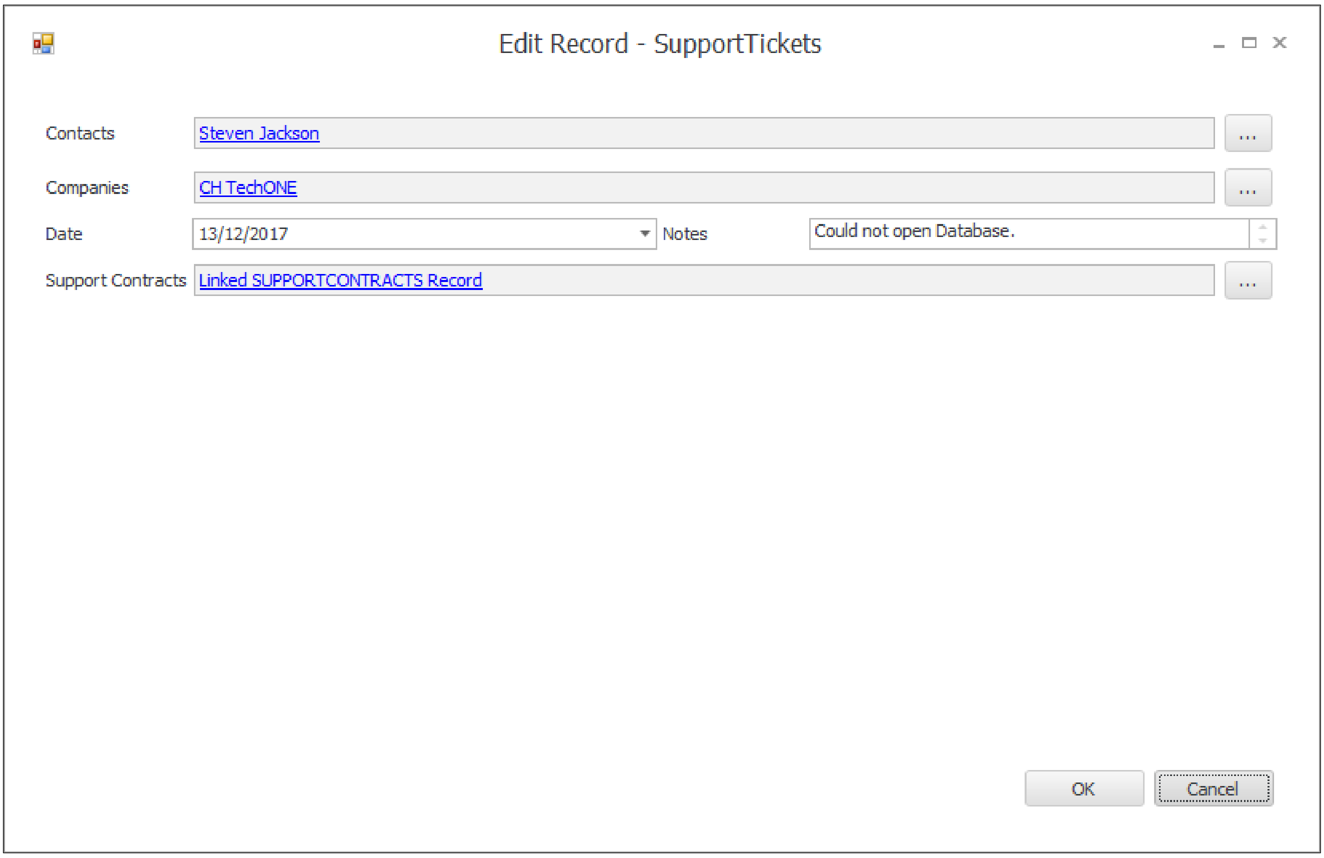


Click **OK** again to complete the process.

If we now go back to the **Support Contracts** tab on the Contact record, and then double-click on it to open it up fully, we will now see the Support Ticket is listed.



If you then double-click on the **Support Ticket** itself you can also open that up fully to view or even edit the details.



Exercise

Create a new Custom Table called **Support Tickets**. Make sure it has 2 custom fields called **Date** and **Notes**. Create a **Layout** for the Custom Table and setup the **Default Columns**.

Create a **Relationship** between your 2 Custom Tables. Ensure the **Support Contracts** Custom Table is the **PARENT** and the **Support Tickets** Custom Table is the **CHILD**.

Add new **Support Tickets** against the 5 Contacts you worked with previously. Make sure you add several Support Tickets against one Contact record.

Using the **Support Contracts** option in the **Navbar**, open your Support Contracts and see if the linked Support Tickets appear.

Managing and Sending Templates

When creating Custom Tables, all of the data added exists only within that area of the program. For instance, if you create any fields for your Custom Tables you cannot see these in the standard Tools > Define Fields section of Act!, nor can you add them to the standard Contact/Company/Group/Opportunity layout, you must add them to your Custom Tables layouts only. Because of this, you are not able to mail merge these fields using the normal methods through the Write menu.

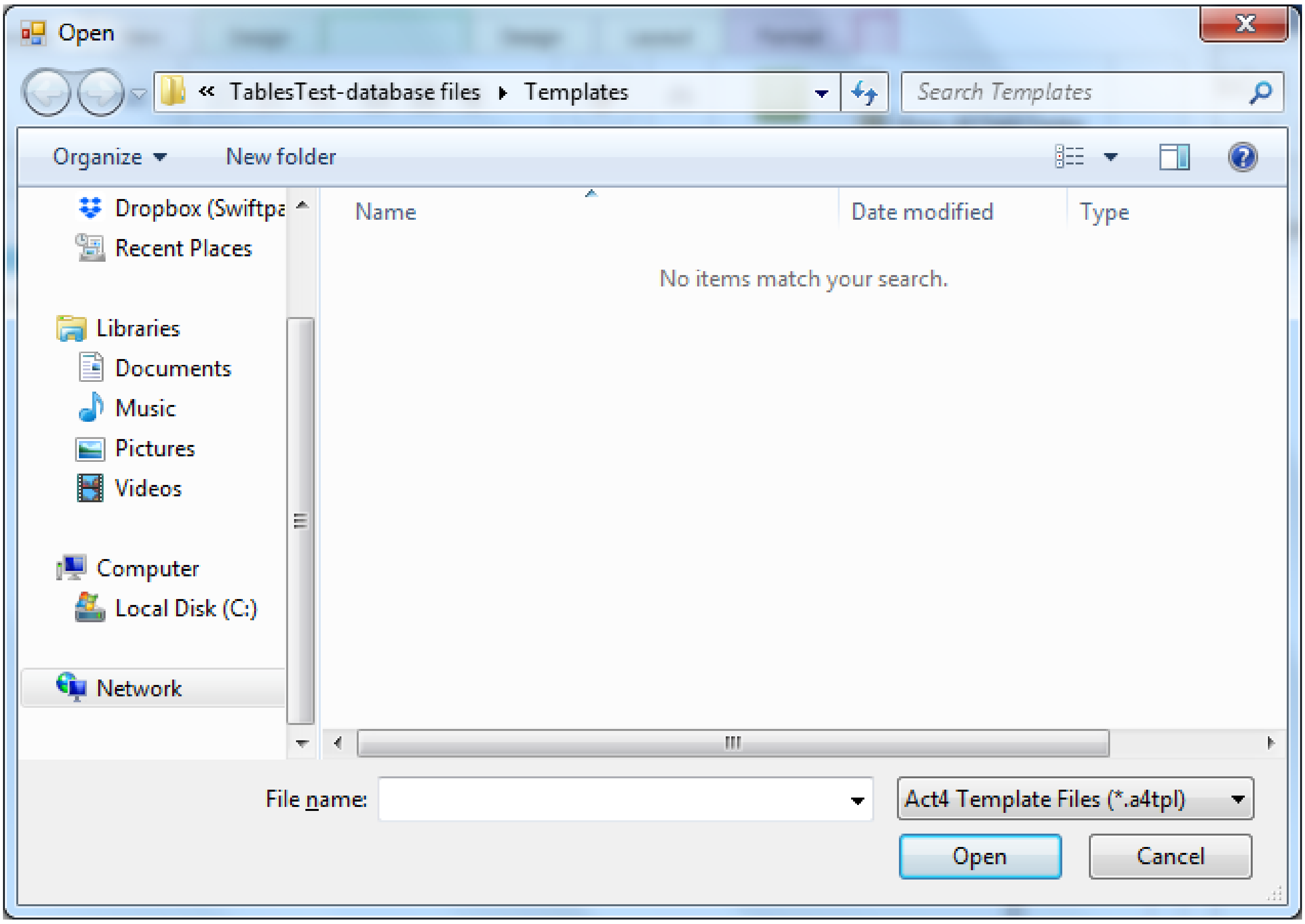
To overcome this, the Custom Tables feature has its own ability to create and send mail merge templates that do make use of the data stored in custom fields. In this section of the training we will see how to both create a template and use it in a mail merge.

NOTE: This functionality currently works in the Act! desktop client only.

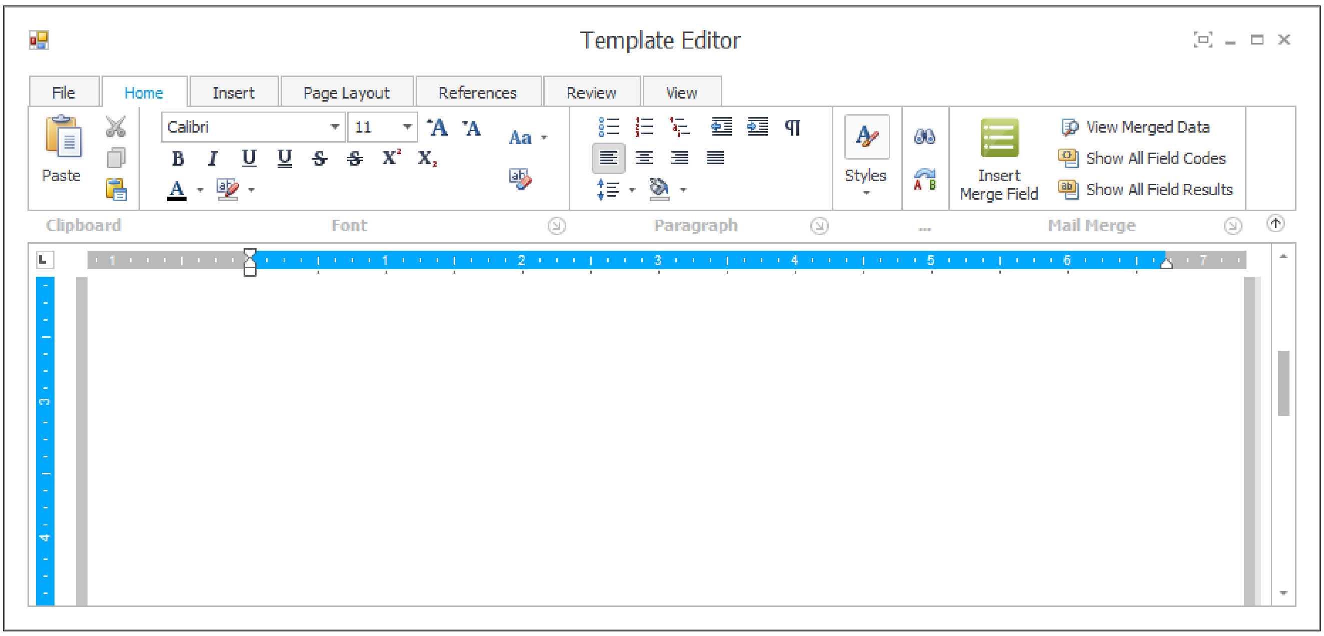
Creating Templates

To begin, click **Custom Tables** > **Manage Templates**. This may take a few minutes to set up the designer if this is the first time you have used it.

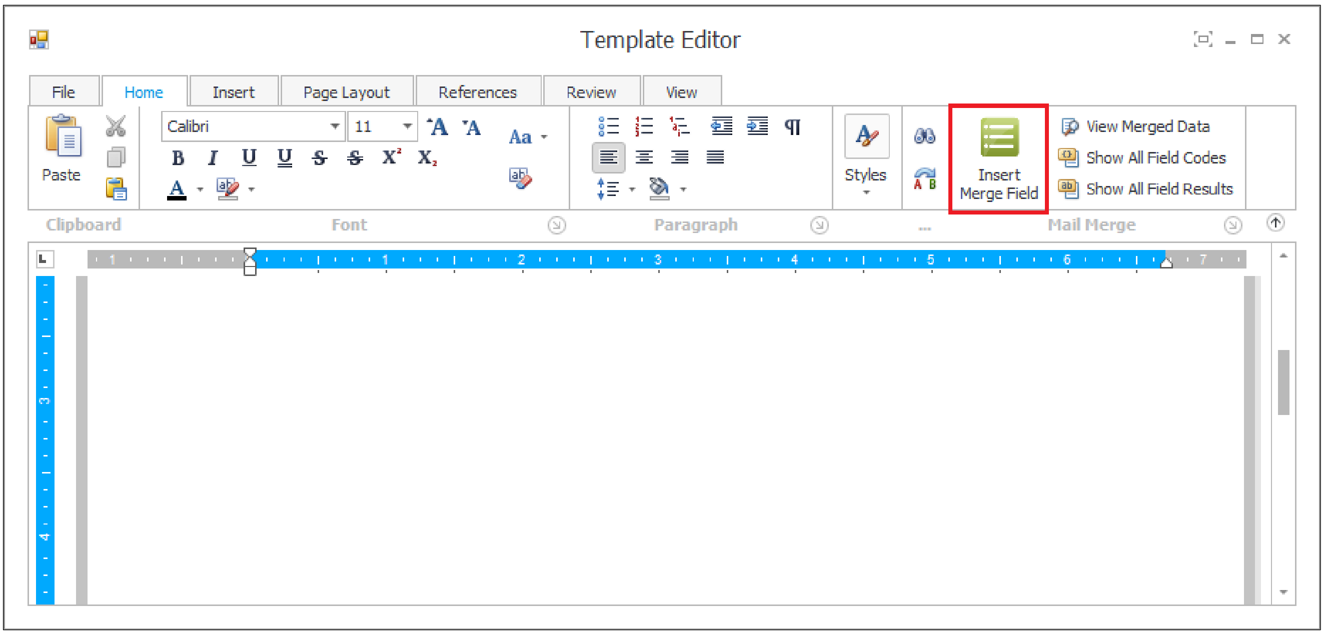
You will be prompted to open an existing template. Again if this is the first time you have used the editor then you will not have any templates available. In this case click **Cancel**.

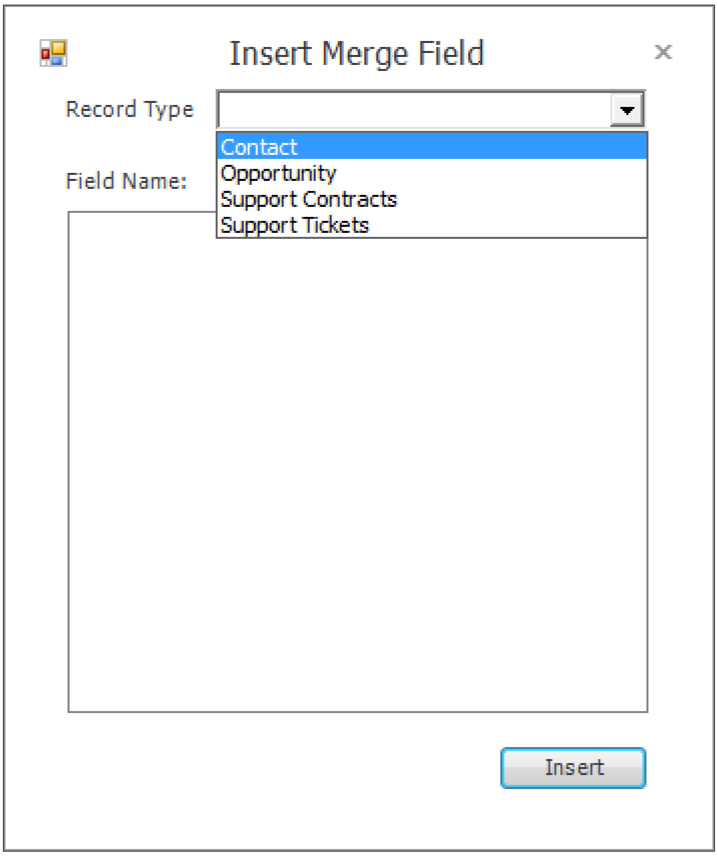


The template editor has been designed to look as much like Microsoft Word as possible in order to make sure new users find it easy to work with. However it is important to note that this editor is completely bespoke and comes with the Custom Templates feature, it does **not** require any Office integration in order to work.



You can create your mail merge template just as you would normally, entering static text and images as needed. if you wish to add a mail merge field, click the **Insert Mail Merge Field** button.

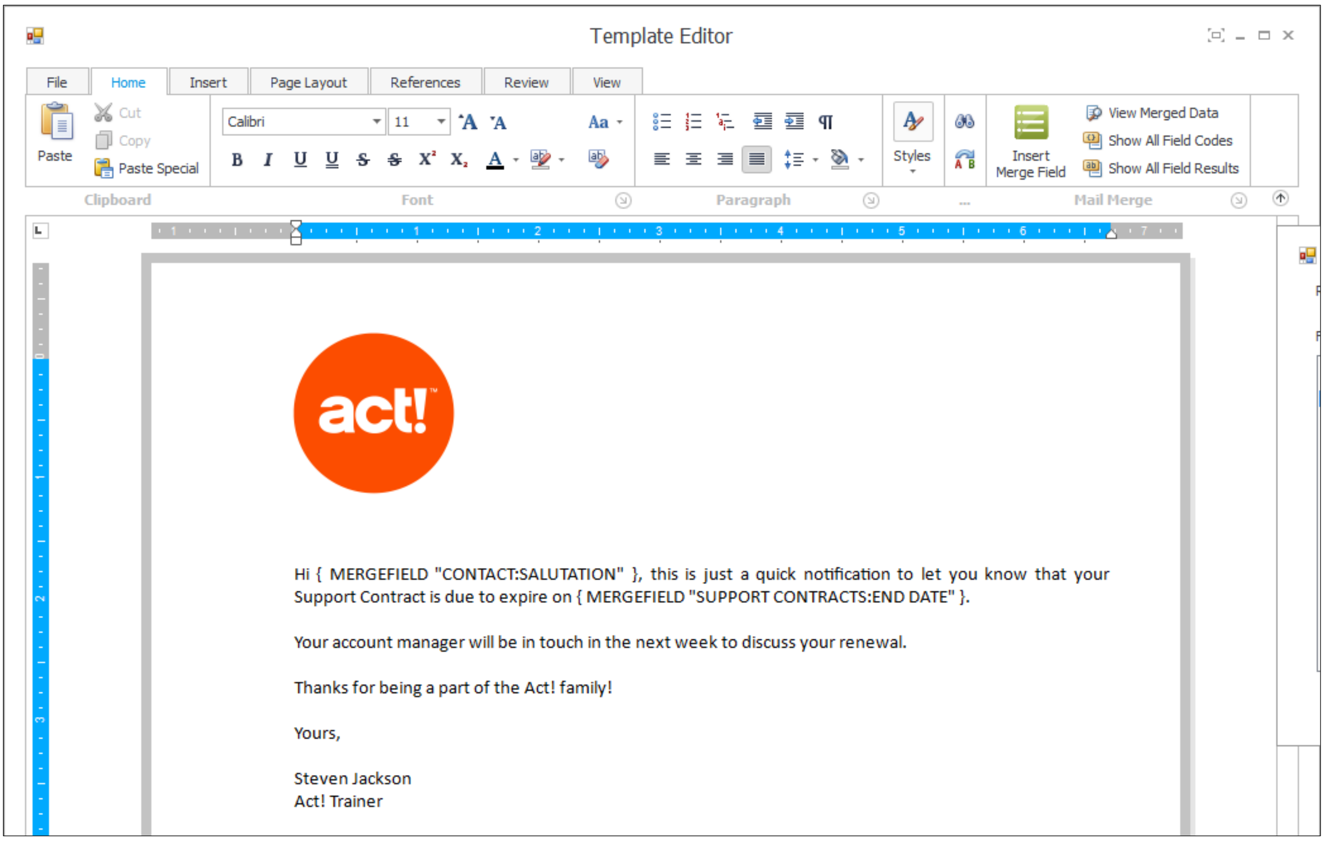




Select the required table from the **Record Type** dropdown to view all fields in that table. As can be seen in the screenshot above, you can pull information from the **Contact** section, the **Opportunities** section, and any **Custom Tables** that you have created (in this case **Support Contracts** and **Support Tickets**).

Select the required field and press **Insert** to add it to the document, exactly as you will have seen when editing normal mail merge templates.

By adding text, images and mail merge fields you can now fully complete your template. A simple example is given below, note the two mail merge fields that have been added, one from the Contacts section, another from the Support Tickets Custom Table.



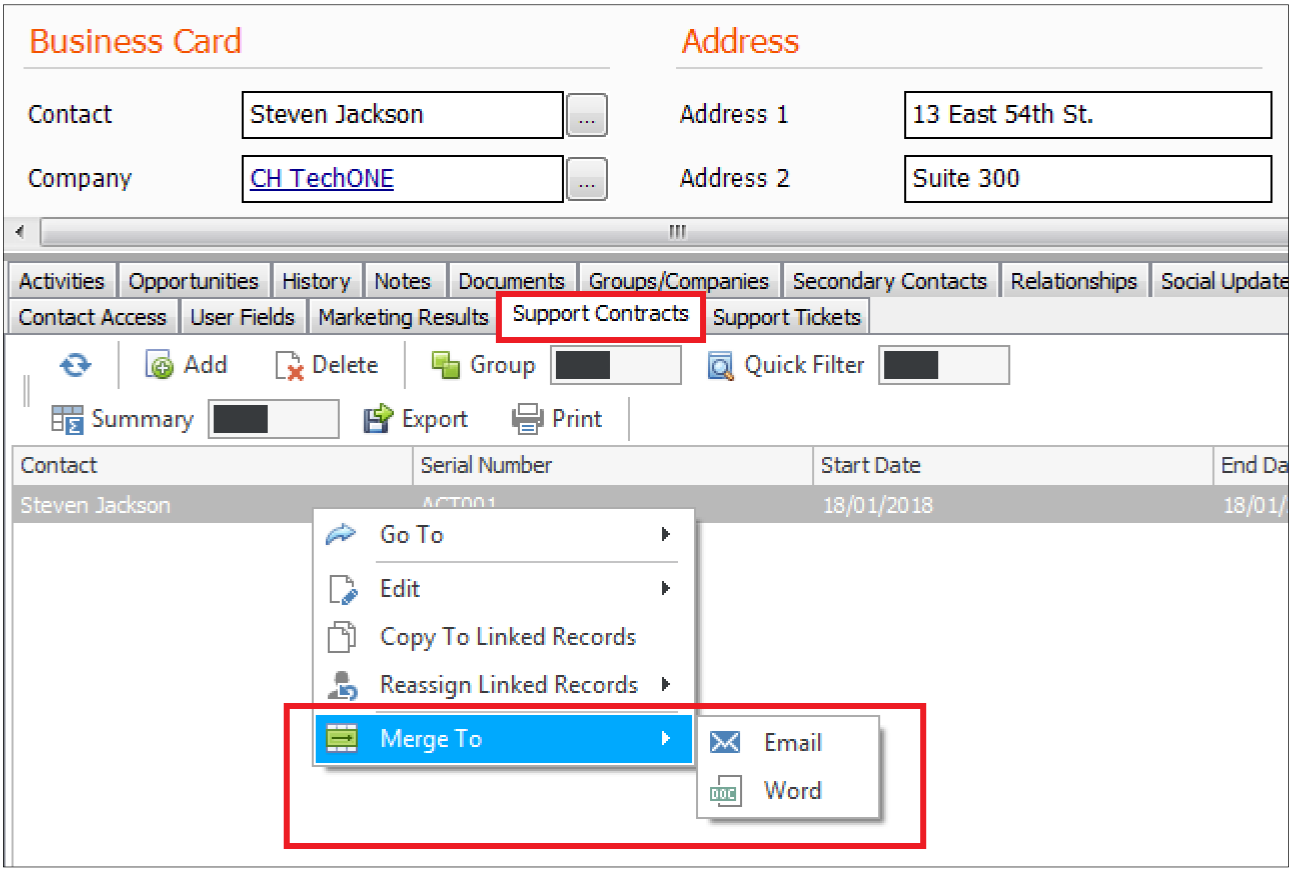
Once the template is ready, click **File** > **Save** and give the template a meaningful name.

Close the Template Editor.

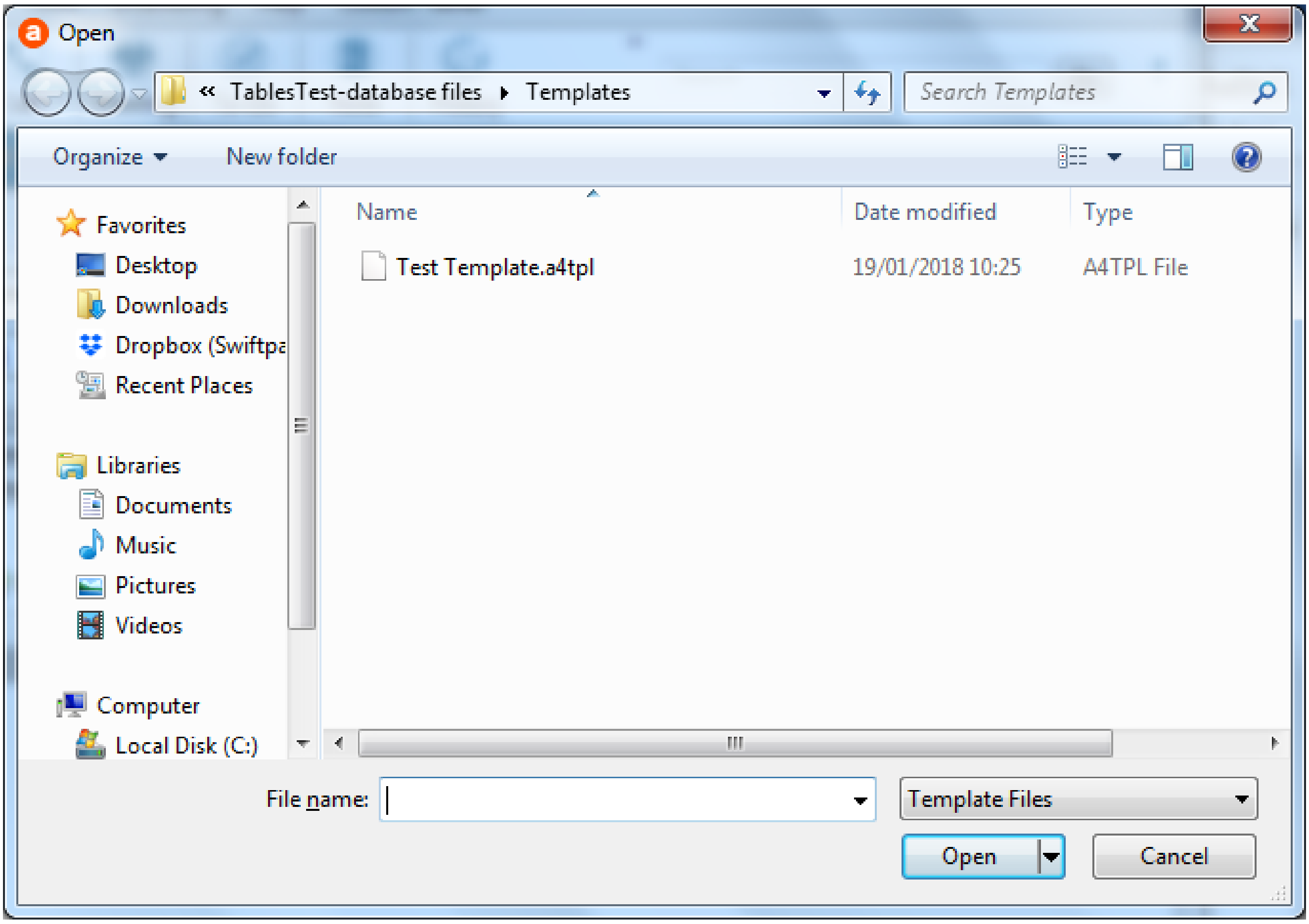
Individual Merge to Email/Word

Now that you have created a template, you will want to use it to perform a mail merge. Mail merges can be performed using either Microsoft Word or Microsoft Outlook, and they can be performed using one record or using multiple records. We will go through examples of this below.

To perform a mail merge, right click on a Custom Table record that you wish to merge and choose **Merge To**. You can do this wherever the Custom Table record appears (so for example, you could do this within a Contact tab, or when using a Custom Table in your navigation stackbar).

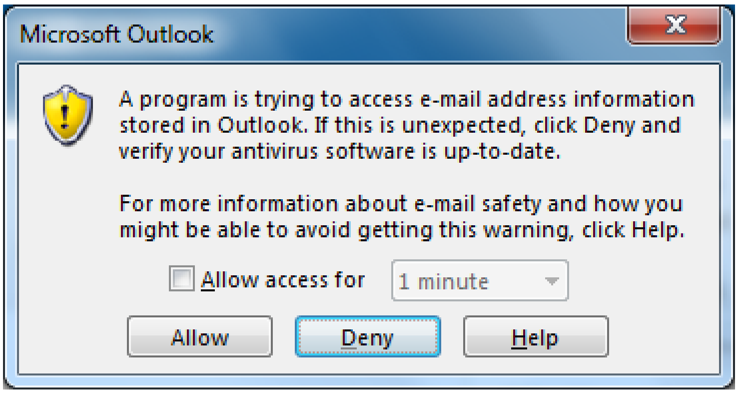


If we choose **Email**, the next prompt is to choose the template that we wish to use.



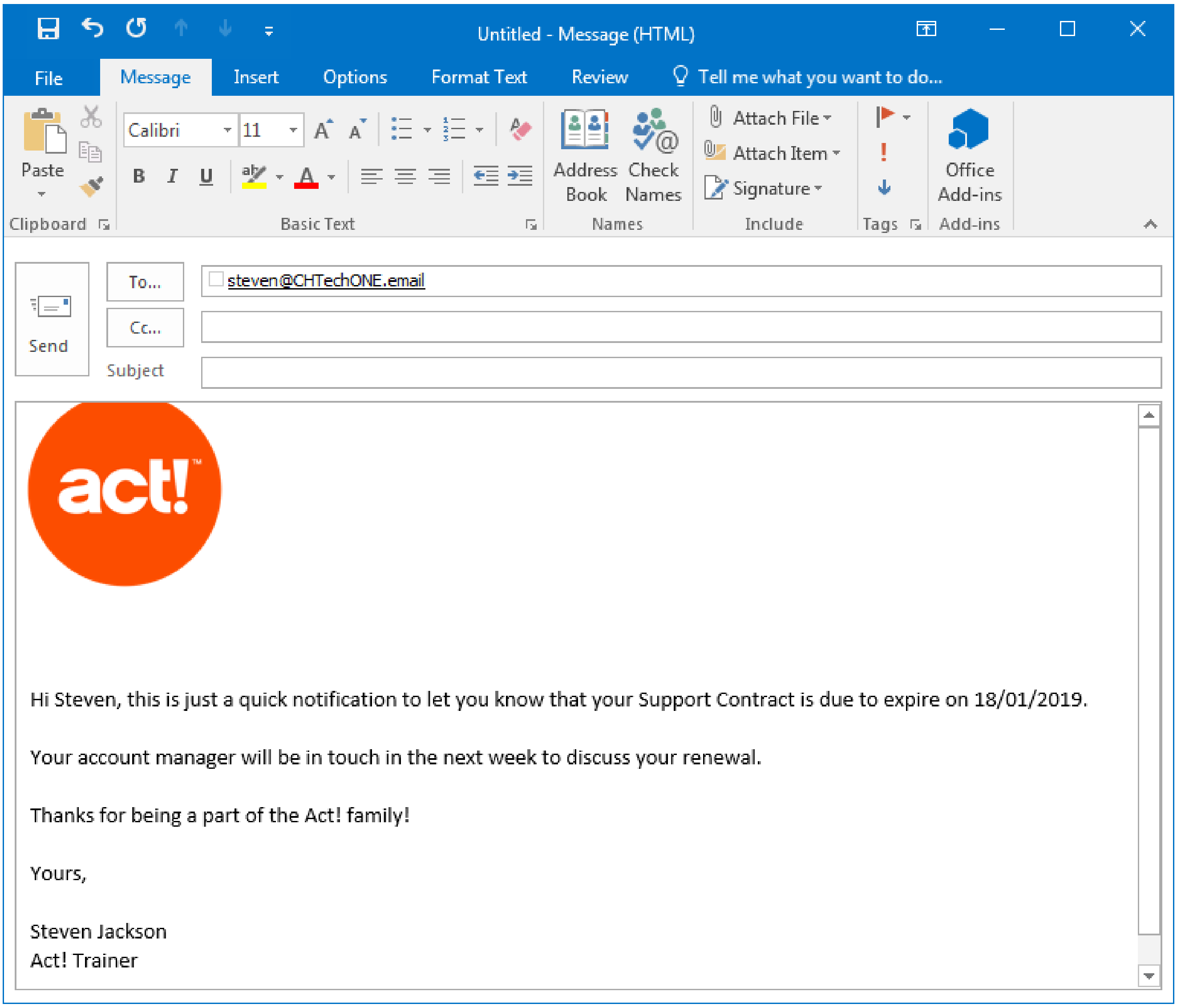
Once you choose your template and click **Open**, Outlook will then launch an email using the selected template.

<u>NOTE</u>: You may get the below warning in Outlook, make sure to click **Allow** to this message**.**



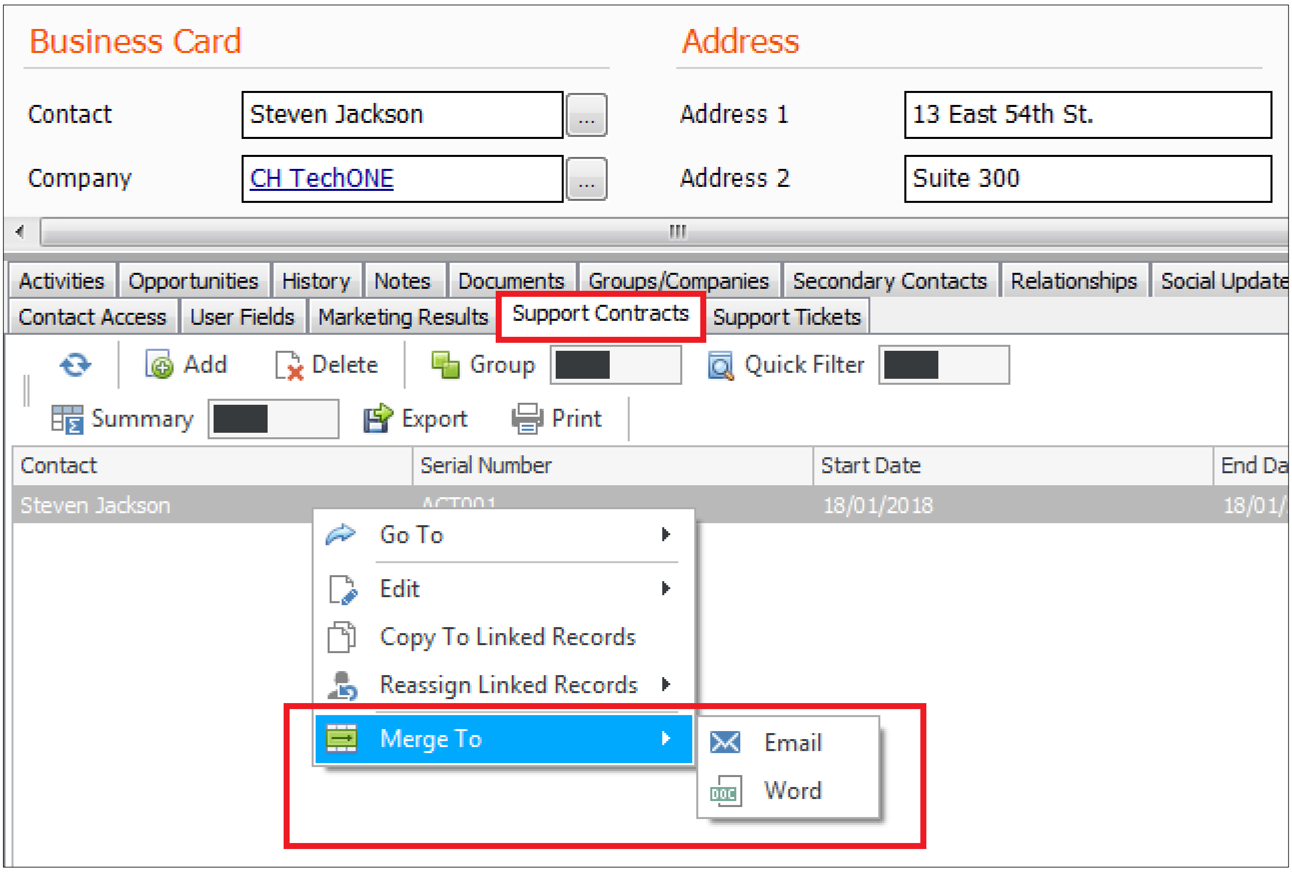
An example of a merged email can be seen below.

tables4act!

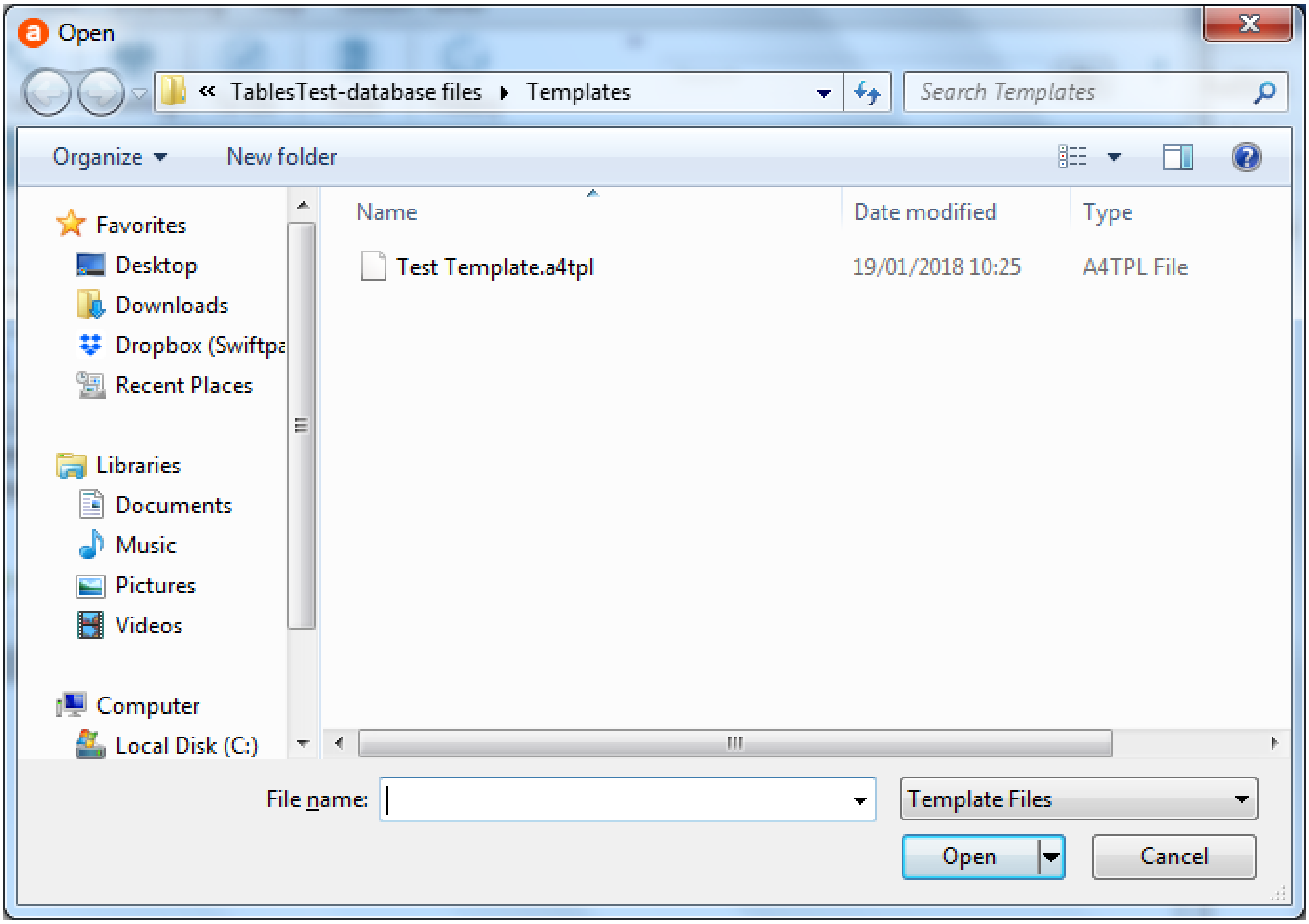


As you can see, the mail merge fields have been completed correctly. As this Custom table is linked to the **Contact** section of Act!, the mail merge process has also been able to pull through the email address of the linked Contact into the **To** field.

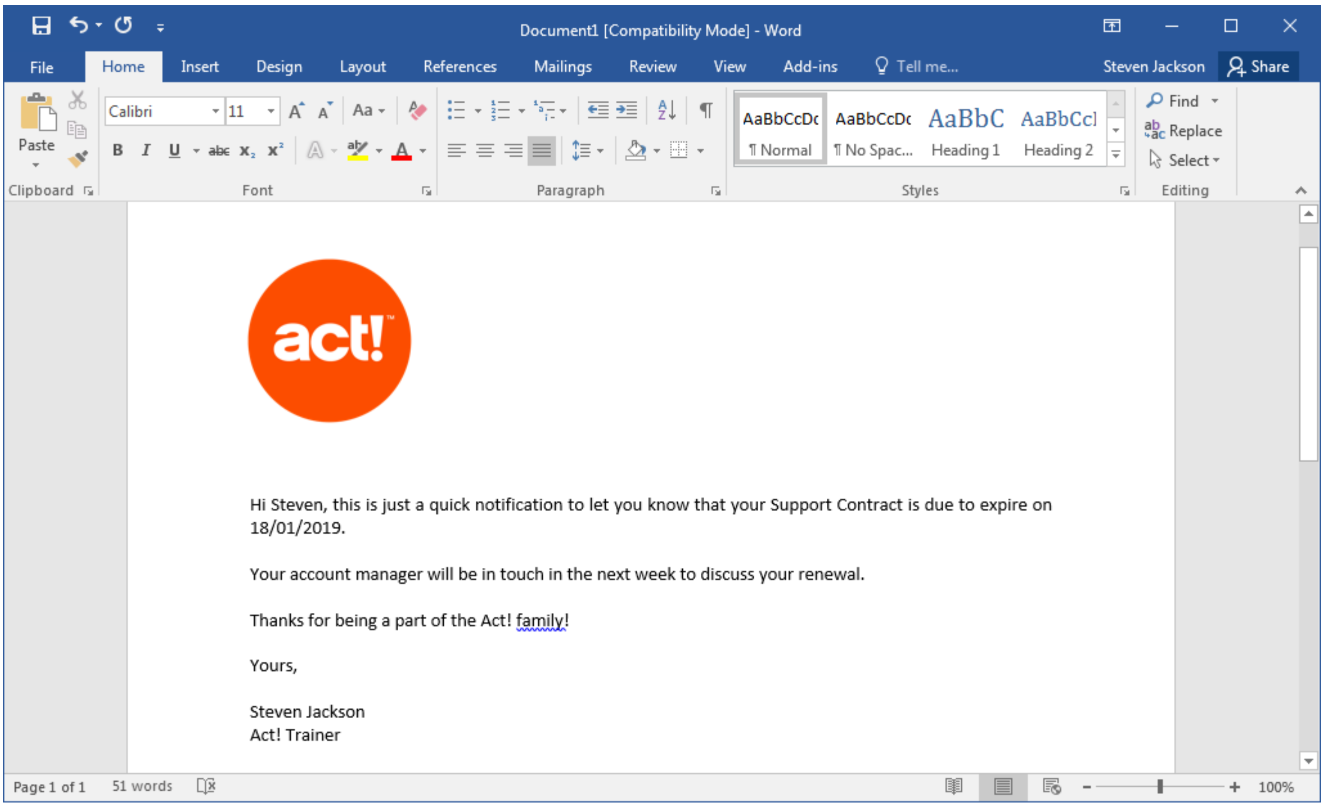
Choosing the option to mail merge to **Word** is a very similar process. Once again right click on a Custom Table record that you wish to merge and choose **Merge To**.



If we choose the option for **Word** this time, then once again we are asked to select a template that we wish to use.



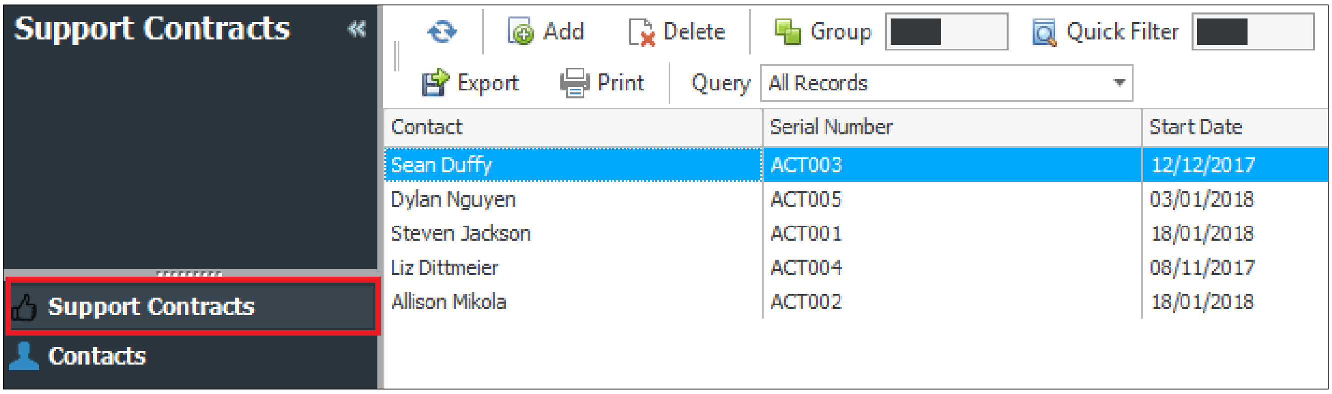
Once you choose your template and click **Open**, Word will then launch using the selected template.



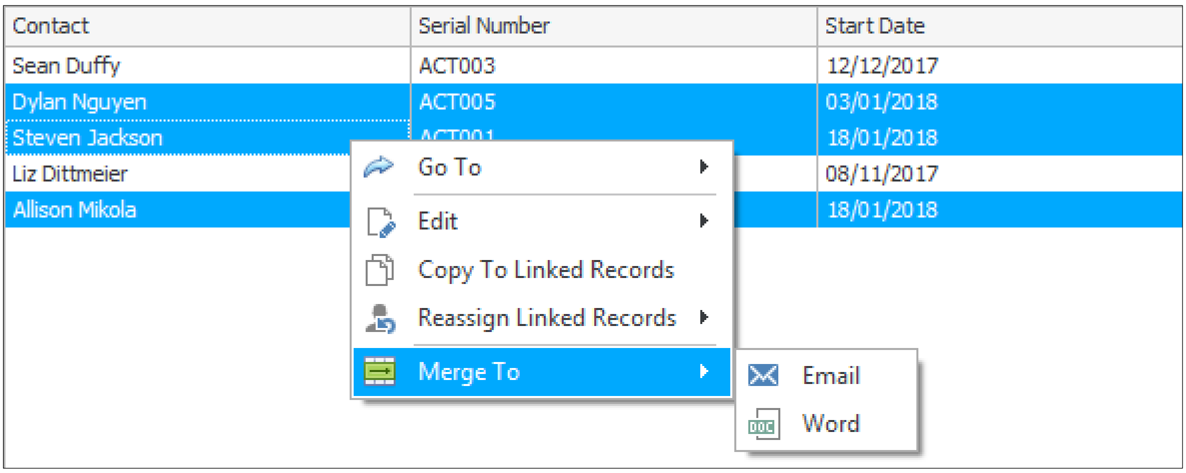
Merging Multiple records to Email/Word

As well as merging to individual records using the Custom Tables feature, you can also merge multiple records at the same time. We will demonstrate merging to multiple records using Email and Word below.

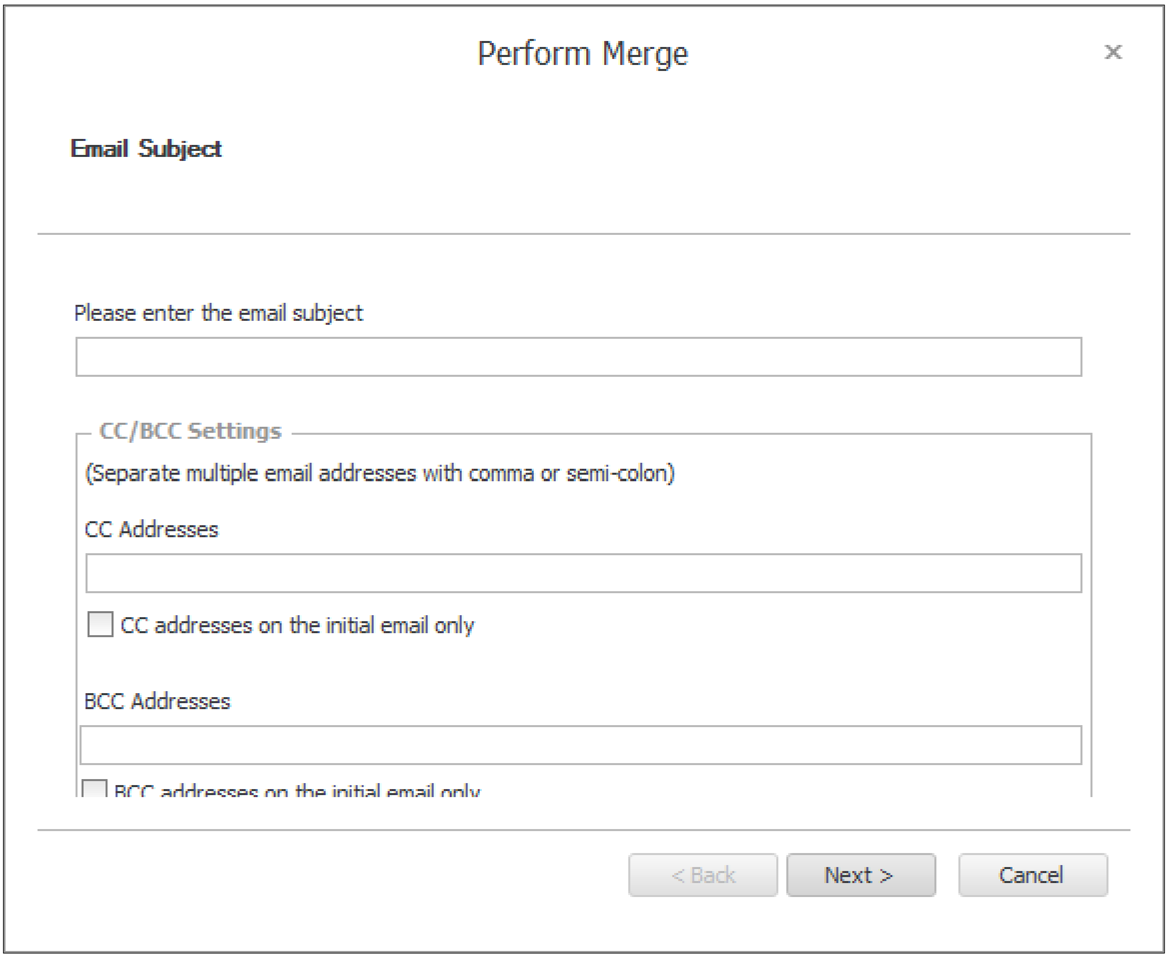
Firstly, you must highlight all of the records that you want to merge. This is typically done by using the Custom Table option in the navigation stackbar so that you have a list of records that you can merge.



To highlight the records, use the **CTRL** or **SHIFT** keys on your keyboard (you can of course create a **Group** or use the **Quick Filter** to help narrow down your list). Once you have the desired records highlighted, right click on them and choose the option **Merge To**.



If we choose the option for **Email**, we will then be prompted to choose the template as previously, but after that we will see a new screen.

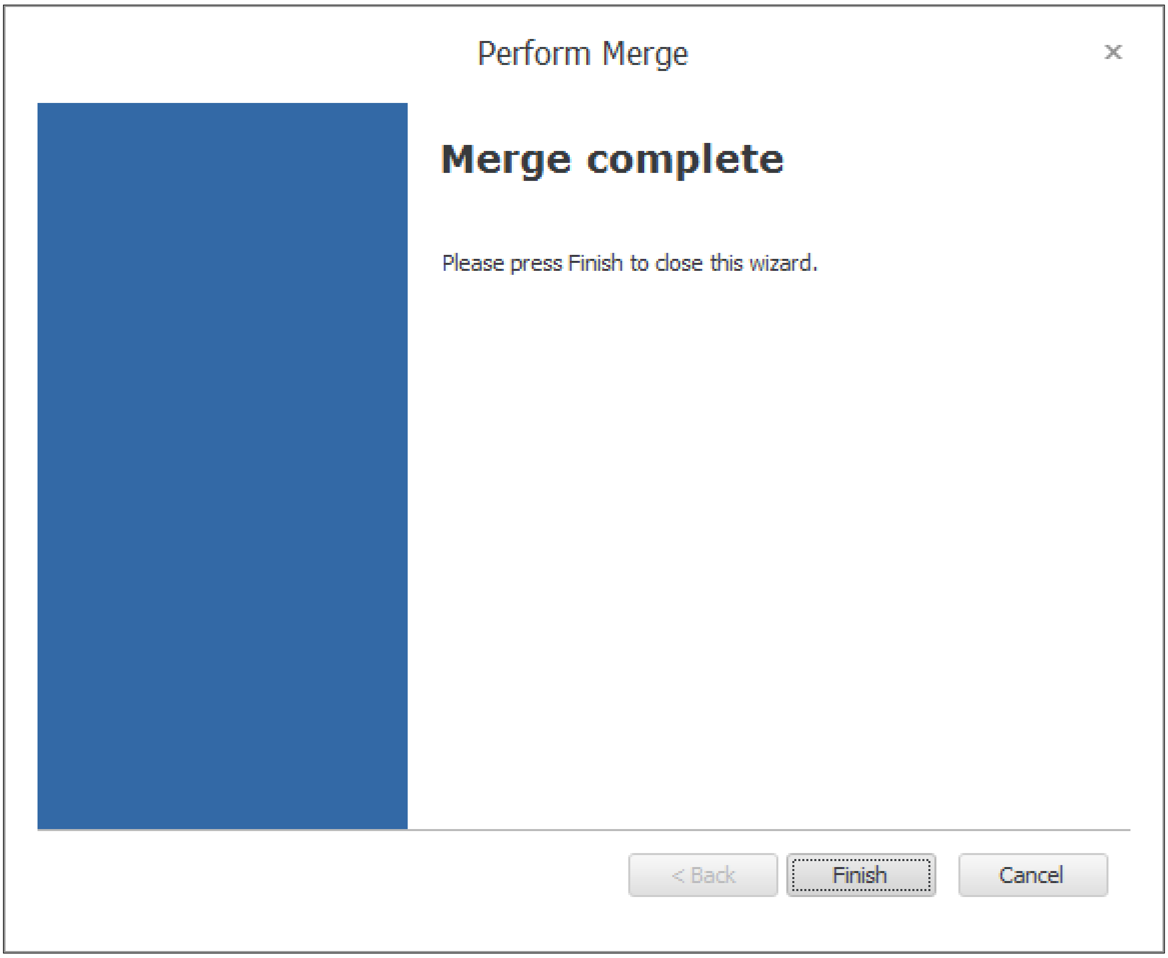


Enter a **Subject** for the mail merge.

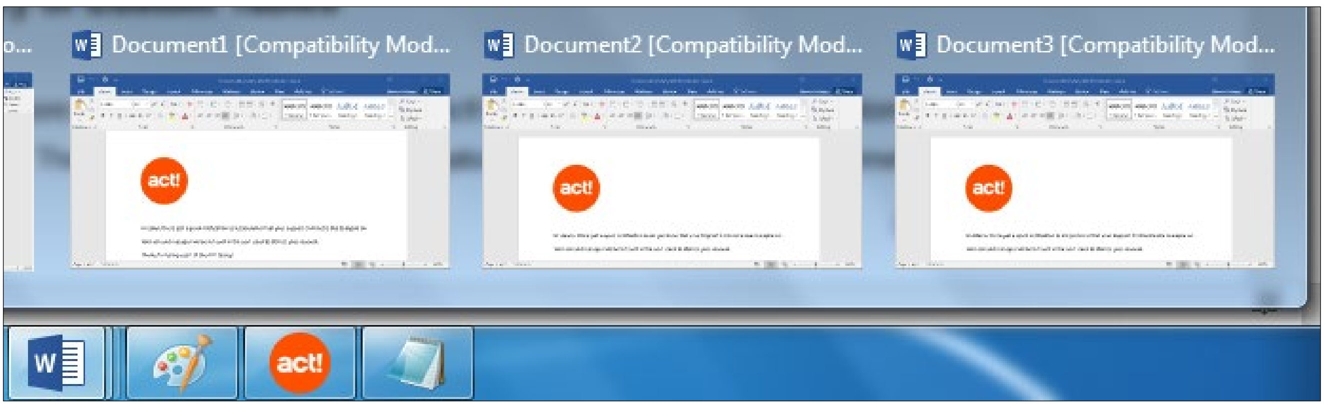
As part of this process, an individual email will be sent to each of the Contacts separately, exactly the same as with the normal Act! Mail merge feature. The options you can see on the screen above are if you also want to copy in additional email addresses (such as the account manager for example).

Once you click **Next**, Outlook will then send out all of the emails automatically.

Once the process is complete you will receive a confirmation message.



If instead of choosing to merge as an Email we choose the option for **Word** instead, we will once again be prompted to choose a template. As soon as you have chosen a template however, an instance of Word will then open **for each Record highlighted**. So for example, if I have three records highlighted and perform the merge to Word, three documents will be opened.



Exercise

Create a simple **Template** that advises customers their Support Contract is about to expire. Make sure to include the **End Date** from your **Support Contracts** Custom Table as a mail merge field.

Test sending your template to **individual** contacts via email and Word, then test sending your template to **multiple** contacts via email and Word.

Importing Data

As with many other parts of Act!, it is possible to import data from a Microsoft Excel spreadsheet or CSV file directly into your Custom Tables. This can obviously save the customer a lot of time, particularly when they first start using Act!. The recommended method of using this feature is to import information into your Custom Tables for existing records (Contacts/Groups/Companies/Opportunities) in Act!. So for example, if you wanted to import a list of old Support Tickets for your Contacts into your Custom Table, you would need to already have those Contact records created in Act!.

In the example below, we will examine how to import a spreadsheet and include information on duplicate checking. As always, we would **strongly** recommend backing up a database before performing an import.

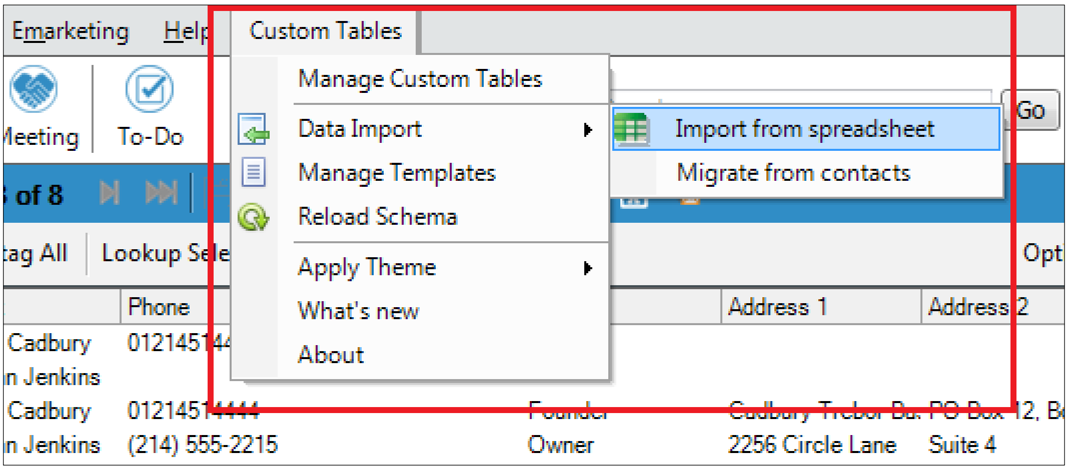
NOTE: This functionality currently works in the Act! desktop client only.

The example below will use the following simple spreadsheet.

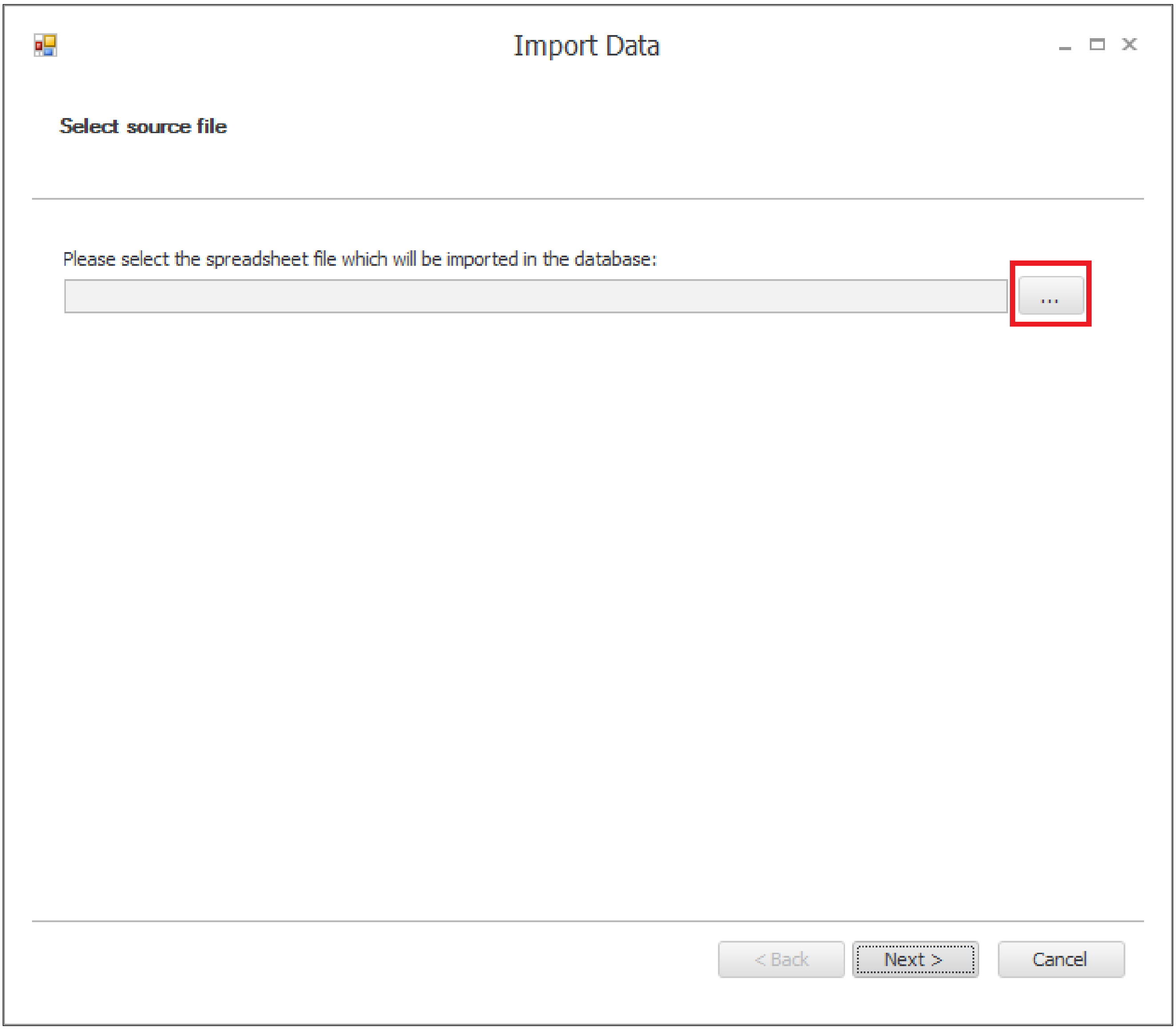
C8 | Cannot mail merge.

	A	B	C
1	**Contact**	**Date**	**Notes**
2	William Cadbury	01/08/2017	Cannot open database.
3	Jonathan Jenkins	03/09/2017	Interested in using AEM.
4	William Cadbury	17/08/2017	How to Export to Excel.
5	Jonathan Jenkins	12/12/2017	How to Creat a Group.
6	Herman Getter	15/09/2017	Forgotten password.
7	Chris Burn	26/08/2017	How to create a new User.
8	Meagan Ryan	20/11/2017	Cannot mail merge.

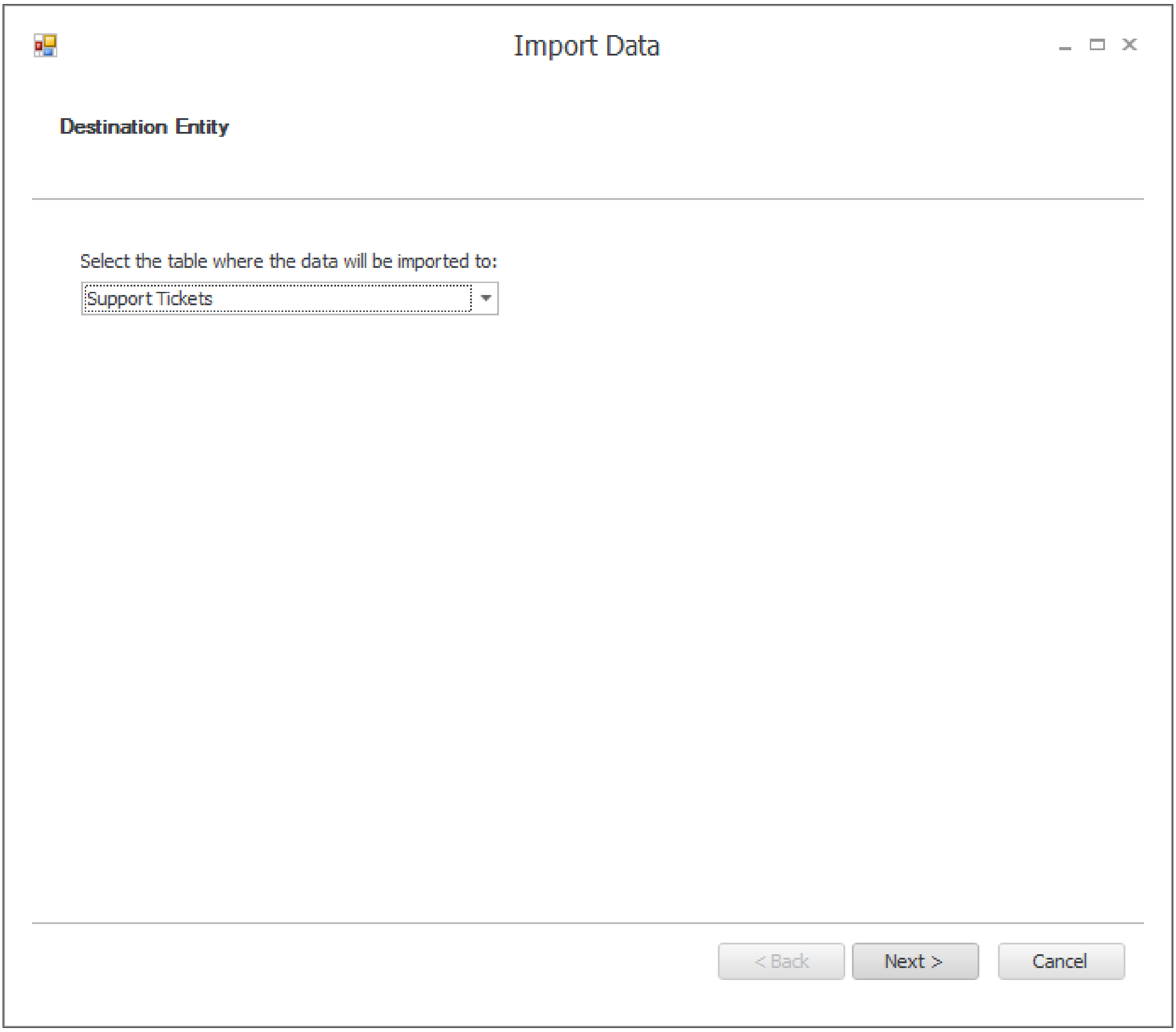
To begin, click **Custom Tables** > **Data Import** > **Import From Spreadsheet**.



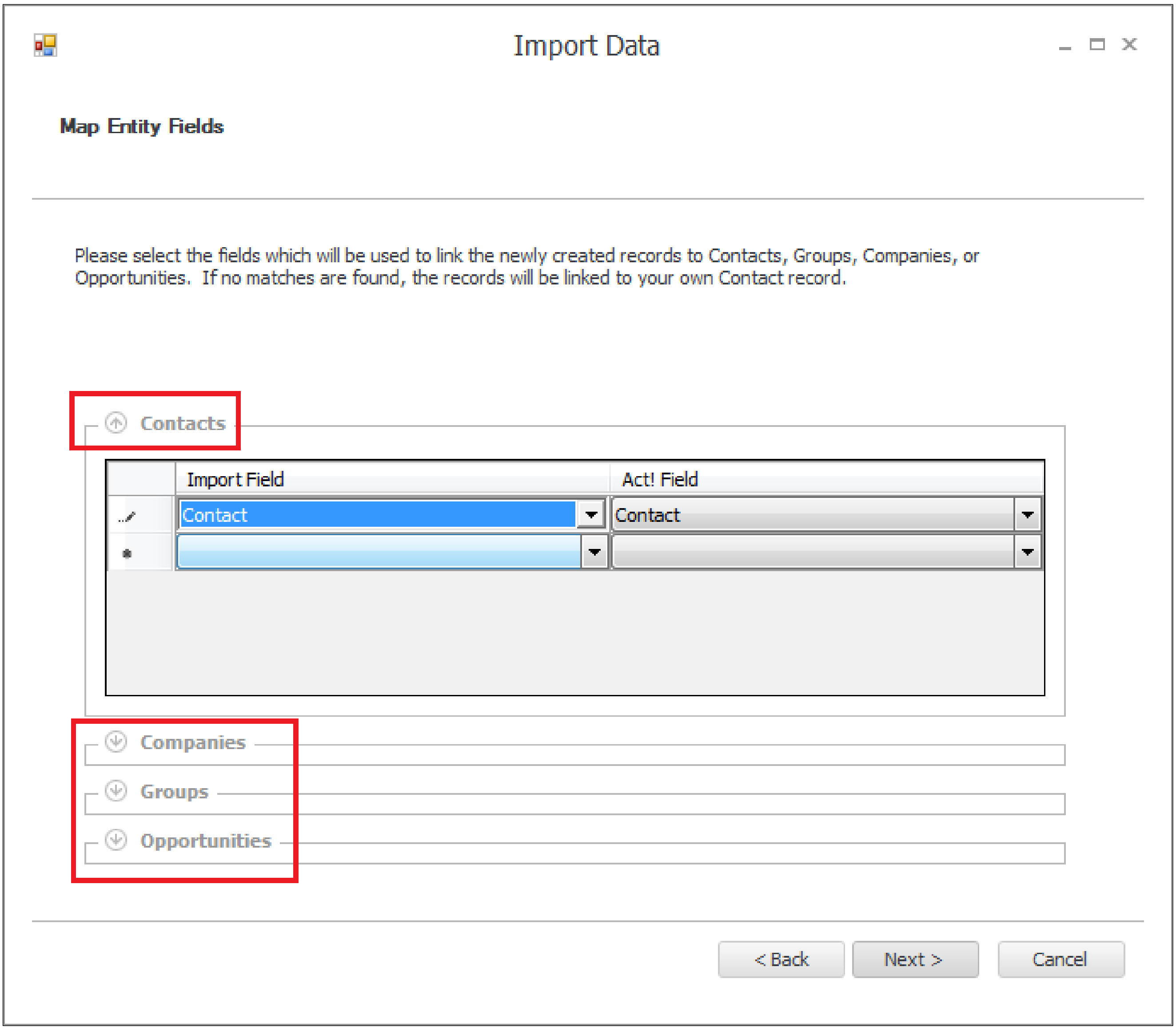
You will be prompted to select the spreadsheet file that you wish to import. Click the **ellipsis** icon, browse to your spreadsheet and click **Next**.



Select the table from the dropdown where you want to import the records to. Click **Next**.



If the spreadsheet contains fields which can be used to link the records to an Act! entity such as Contacts, Groups, Companies or Opportunities, select and map them. In this example we want to import Support Tickets and have them match against existing Contact records which has been highlighted below, but note too the other entity options at the bottom of the window.

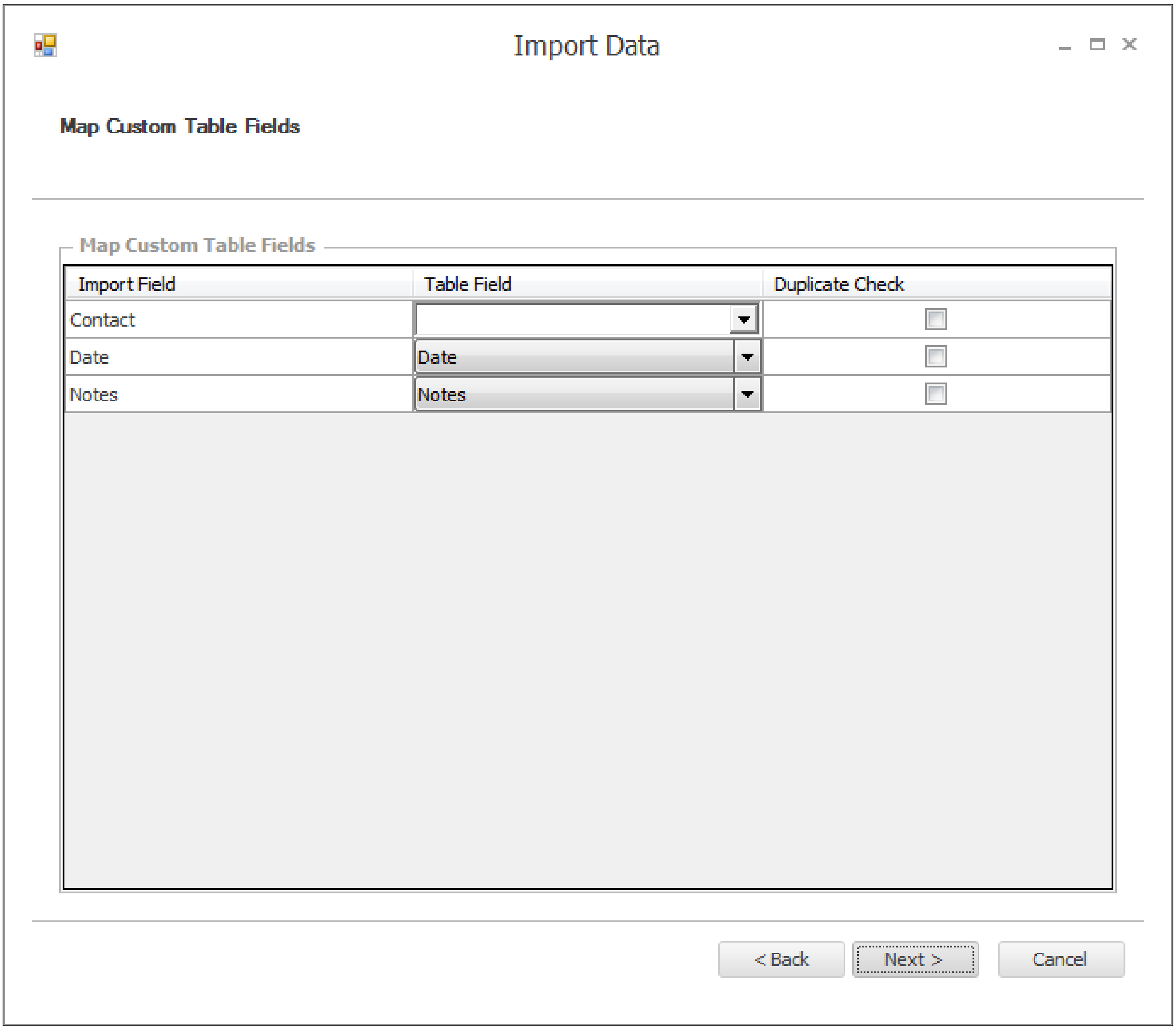


If no mappings are defined, the records will be imported **under the currently logged in user's contact record**. This is why it is important to make sure the Contact records you wish to import information against are already created in the database (as mentioned at the start of this section of the training). Ideally you will want to map several Act! fields at this point to make sure that the imported data links to the correct existing records. In this example we will only map one field, Contact, and see if there are any problems.

Click **Next**.

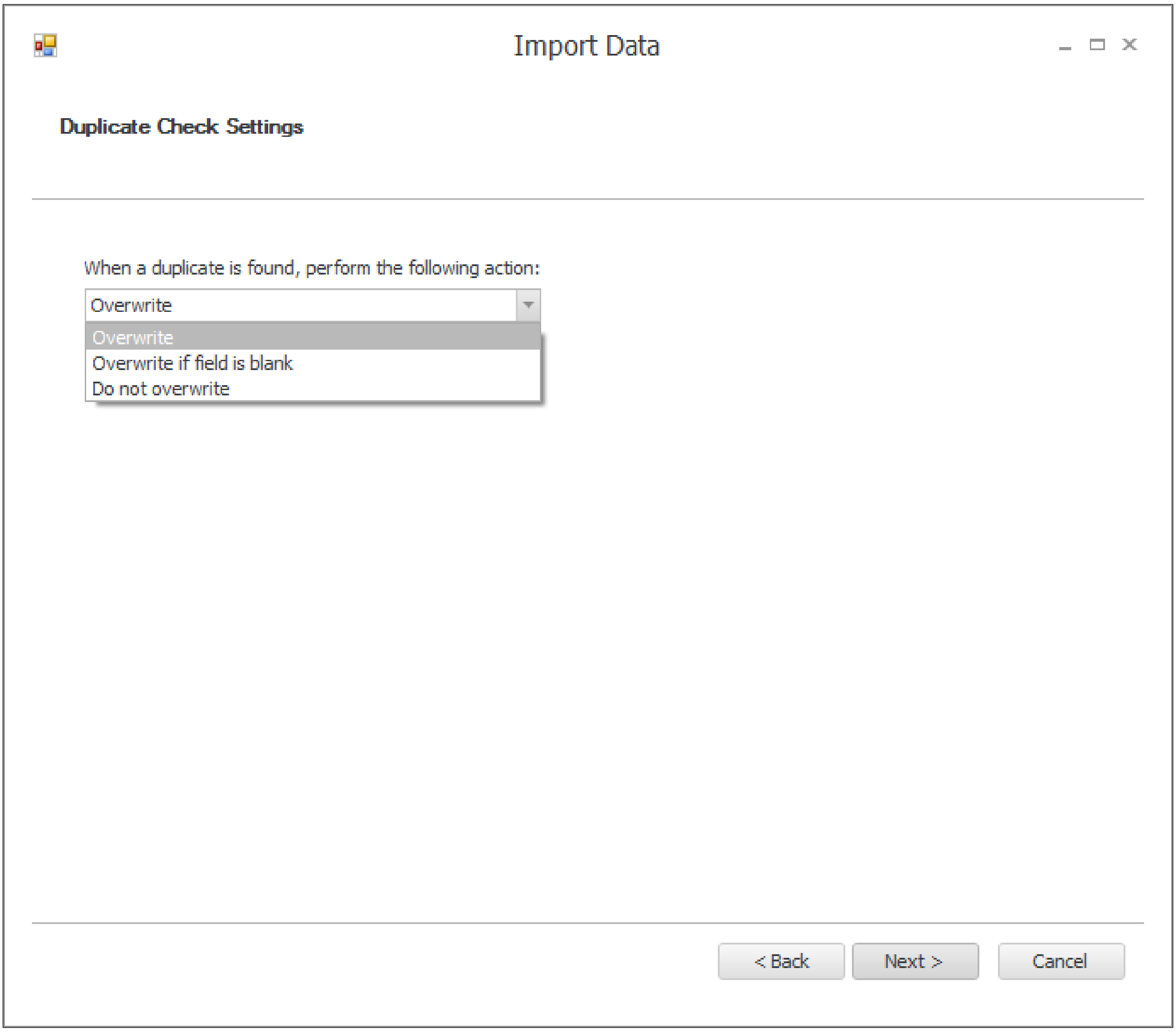
Map the **Import Field** fields to the **Custom Table Fields**. If you wish to duplicate check the records that will be imported, you can enable duplicate checking on the required fields by checking the **Duplicate Check** column. Click **Next** once fields you wish to import are mapped.

In the example below, we have a **Contact** column that is not mapped at this stage. This is because our Custom Table itself does not have a Contact field. This field has only been included on the spreadsheet to make sure that the records link to the correct Contacts once they have been imported (see above screenshot).

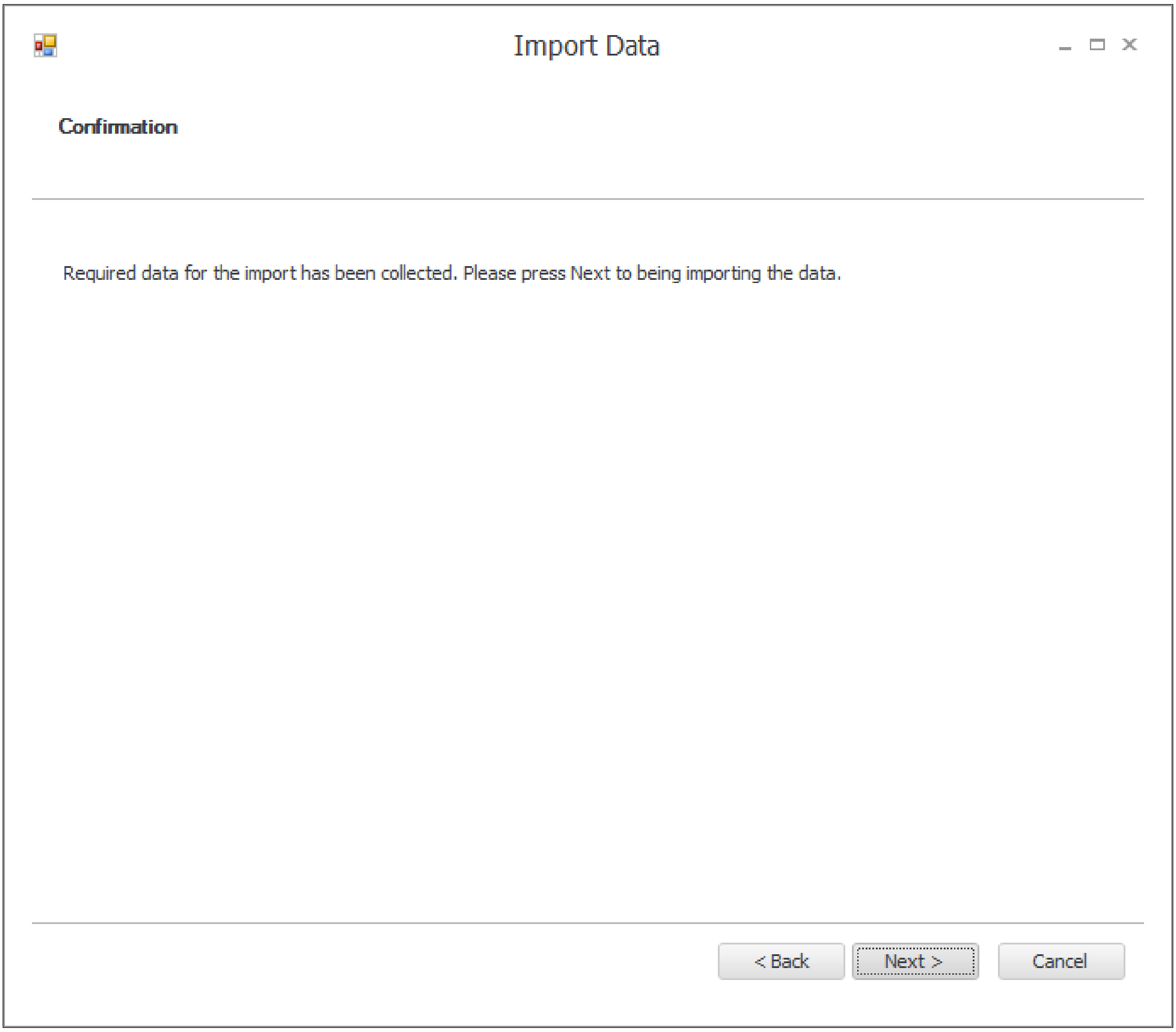


From the dropdown select the action that will be taken if a duplicate is found.

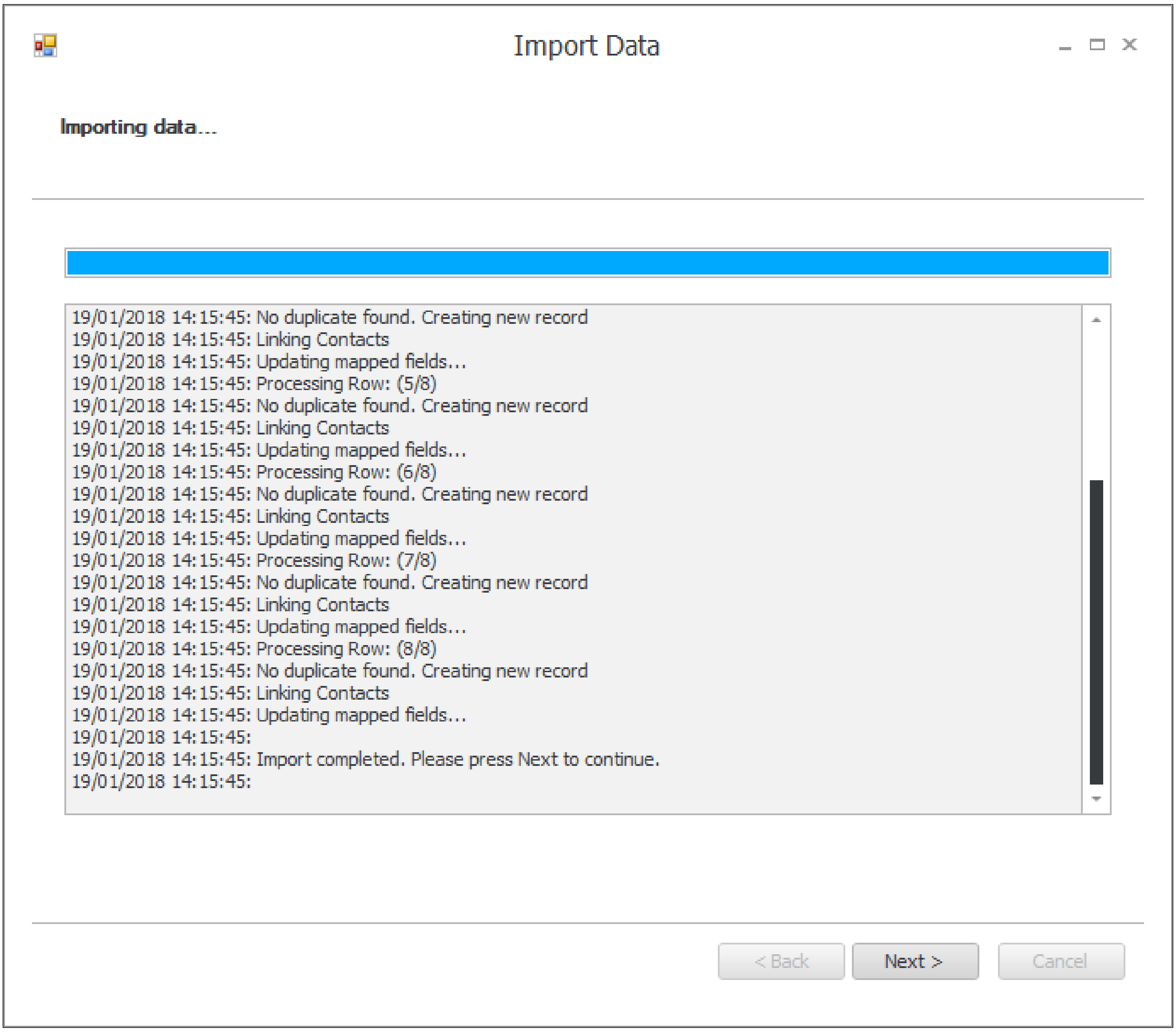
tables4act!



Press **Next** twice to import the records in the database.

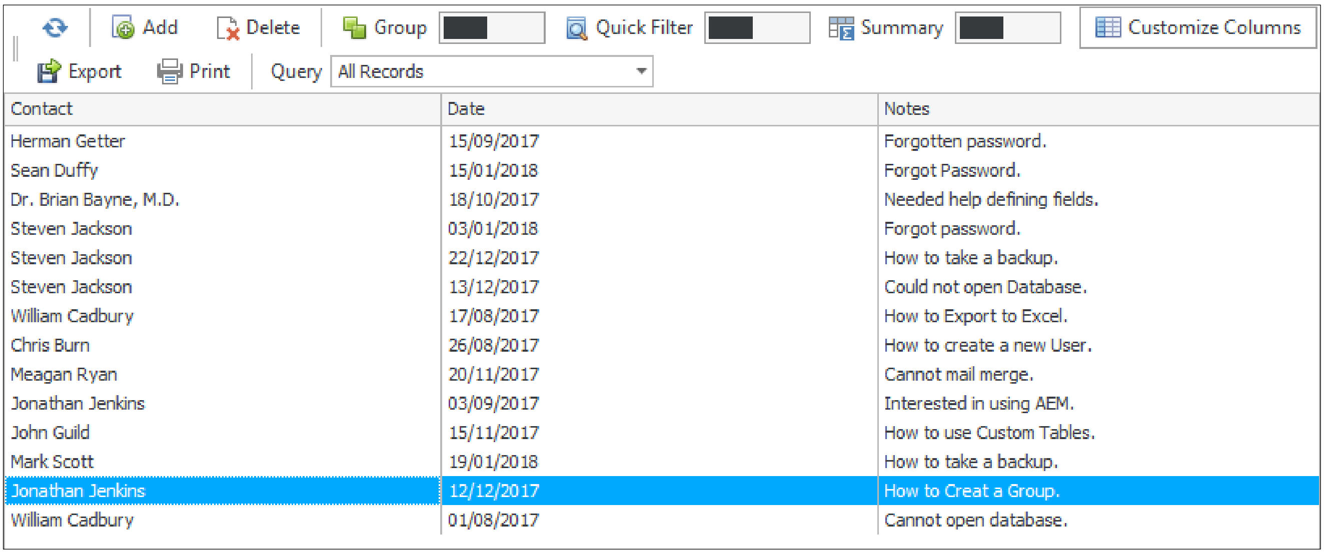


Once the import completes, you will see the following screen.



Click **Next** to see the final confirmation screen, then click **Finish**.

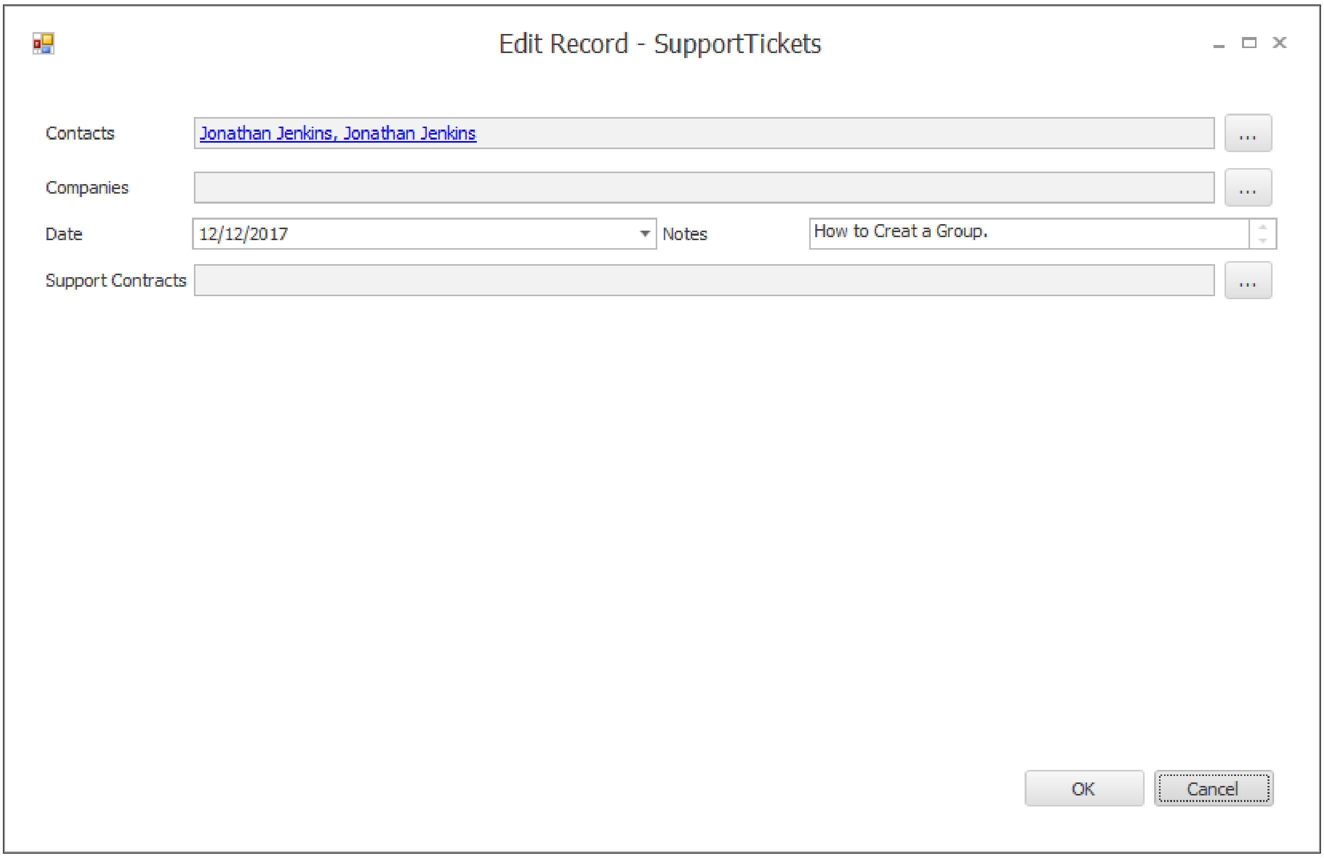
The records will now have been imported into your Custom Table. As we can see below, the new records have been added to the **Support Tickets** Custom Table.



Contact	Date	Notes
Herman Getter	15/09/2017	Forgotten password.
Sean Duffy	15/01/2018	Forgot Password.
Dr. Brian Bayne, M.D.	18/10/2017	Needed help defining fields.
Steven Jackson	03/01/2018	Forgot password.
Steven Jackson	22/12/2017	How to take a backup.
Steven Jackson	13/12/2017	Could not open Database.
William Cadbury	17/08/2017	How to Export to Excel.
Chris Burn	26/08/2017	How to create a new User.
Meagan Ryan	20/11/2017	Cannot mail merge.
Jonathan Jenkins	03/09/2017	Interested in using AEM.
John Guild	15/11/2017	How to use Custom Tables.
Mark Scott	19/01/2018	How to take a backup.
Jonathan Jenkins	12/12/2017	How to Creat a Group.
William Cadbury	01/08/2017	Cannot open database.

Earlier in this section we mentioned that when importing the spreadsheet, we wanted to import the records against existing contacts in Act!. As you can see in the first column, this has occurred successfully. However if you recall, we only chose one field to base this mapping on, the **Contact** field and this could cause us problems.

If we open up one of Jonathan Jenkins records, note the Contacts listed at the top of the record.



We have **two** Contact records in Act! that are called Jonathan Jenkins, and as we only matched on that one field, **BOTH** contacts have been linked to this Support Ticket record. That is why it is recommended to match on as many fields as possible.

Exercise

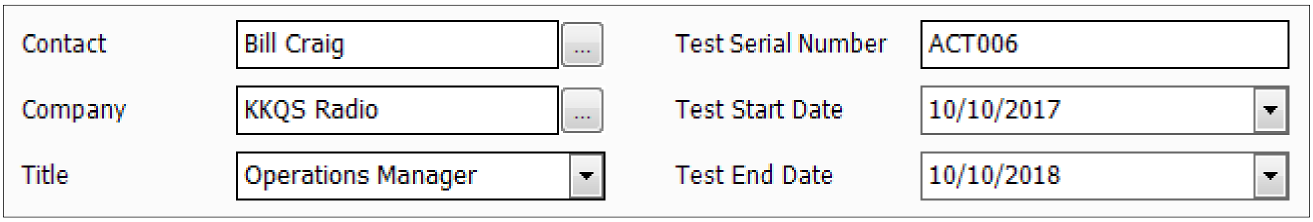
Import the spreadsheet entitled **Tickets Import** into the **Support Tickets** Custom Table in your database.

NOTE: You will want to replace the contact names in the spreadsheet with names of the contacts you have been working on in your database.

Migrating Data

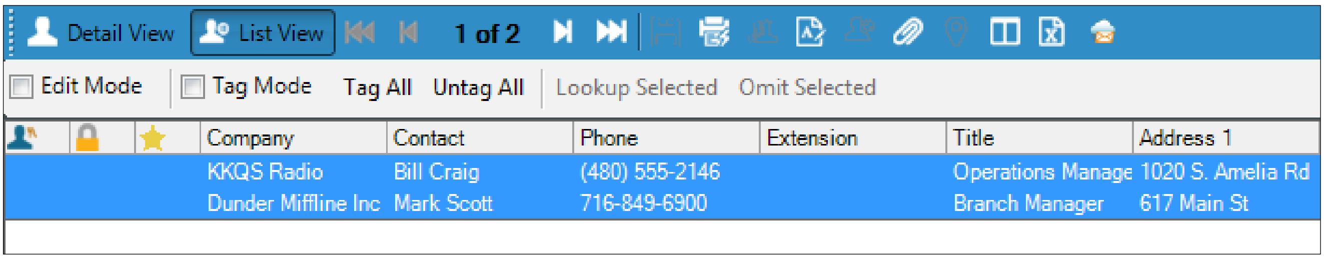
Instead of importing data in, it may be the case that customers have been recording information in normal Act! fields that they want to move to a custom table. Perhaps for example the customer has created additional fields to record the customer's serial number, but now they have a dedicated table for it and they wish to transfer the data to the Custom Table instead. This section will examine how to do this.

In the examples below, we will be moving data from the **Test Serial Number**, **Test Start Date** and **Test End Date** fields into the **Support Contracts** Custom Table.

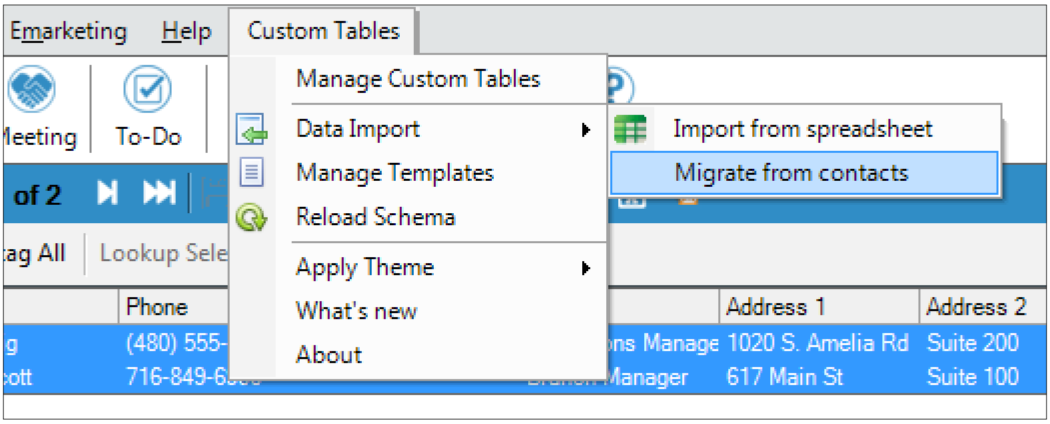


NOTE: This functionality currently works in the Act! desktop client only.

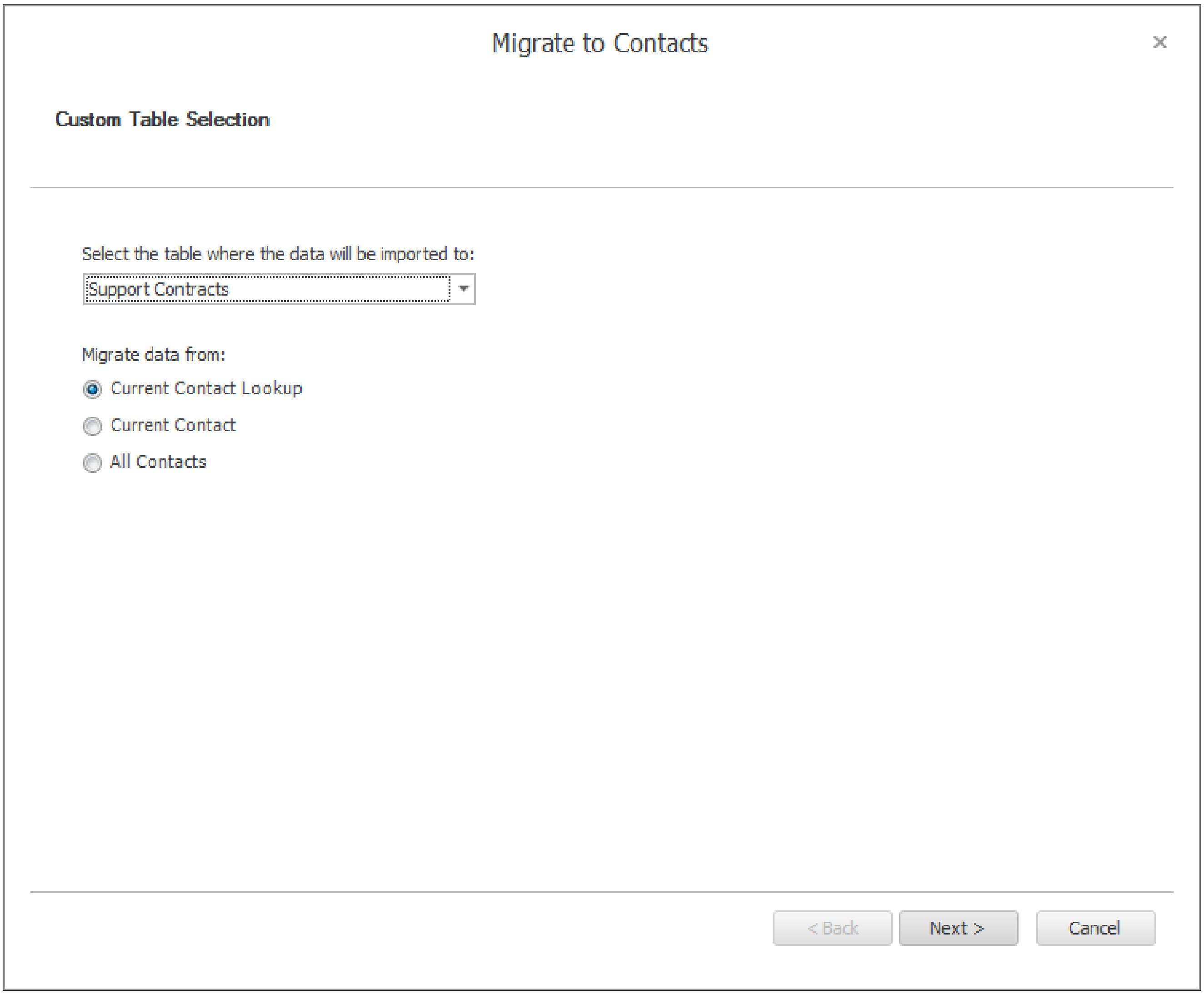
To begin, browse to the Contact record that contains data you would like to migrate to a Custom Table, or create a lookup to perform this function for multiple records.



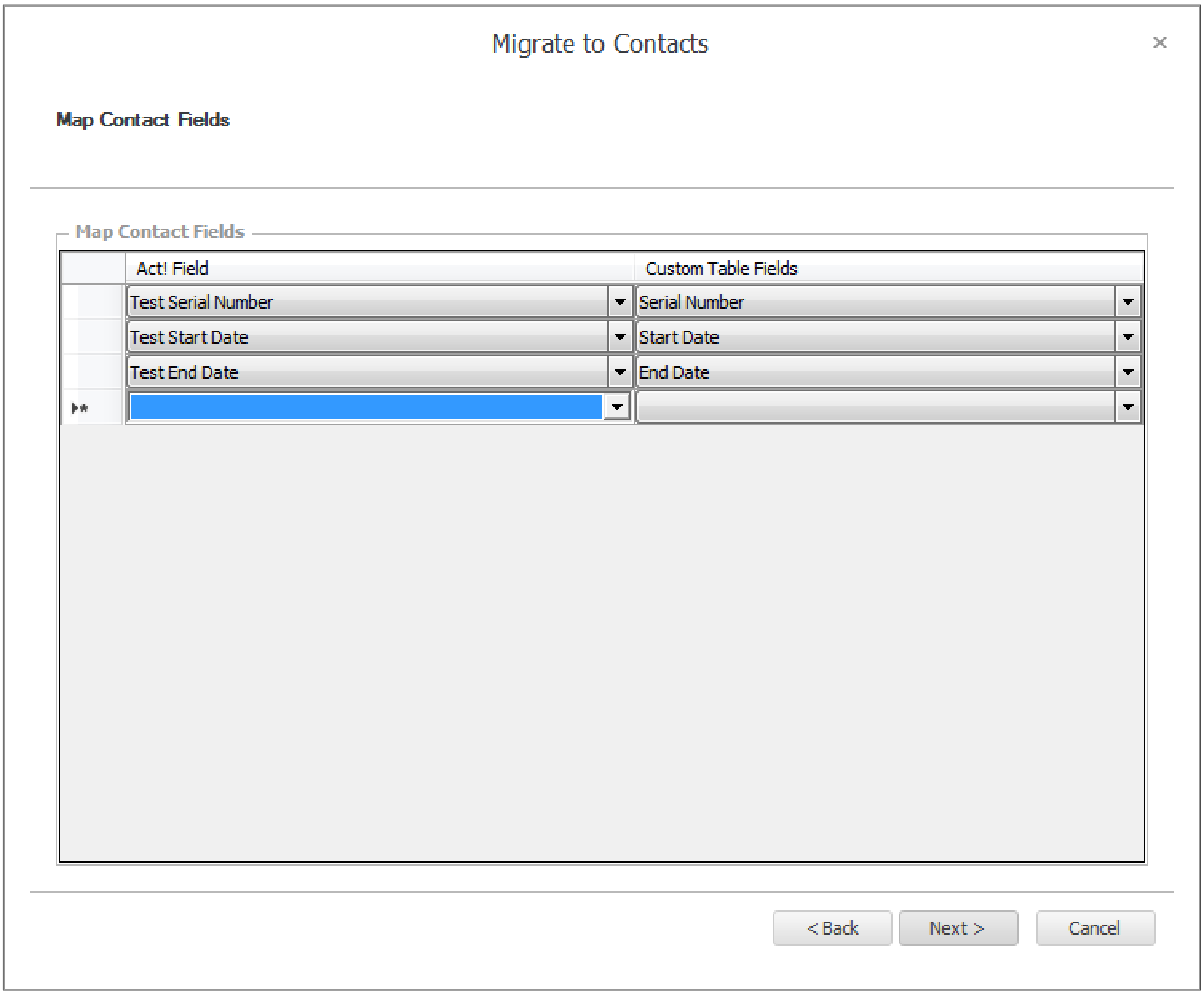
Click **Custom Tables** > **Data Import** > **Migrate from Contacts**



Select the table where the records will be imported to from the list of Custom Tables. Using the radio button, select the Contacts in the database that will be used to perform the import, then click **Next**.

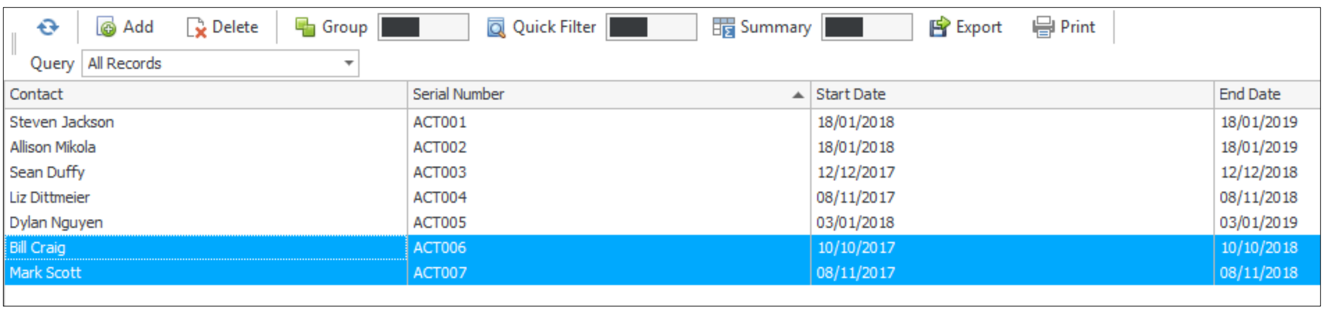


Map the required **Act! Fields** to the **Custom Table Fields**. Press **Next** twiceto begin the import process.



At the end of the wizard click **Finish**.

For each Contact, a new **Custom Table** record will be created and linked to that Contact. If we check the Support Contracts custom table, we can see the two new results at the bottom of the list and they have been linked to their Contact records correctly as well.



<u>NOTE</u>: The data in the original Act! fields has **NOT** been deleted. Once the customer has moved all of the data successfully, they might consider deleting those original fields since they will no longer need them (after taking a backup).

Exercise

Create **3** new standard fields in your Act! database, and call them **Serial Number**, **Start Date** and **End Date**. Make sure the first is a **Character** field, and the other two are **Date** fields. Populate these fields for contacts that you have **not** been working on so far.

Use the **Migrate** process to pull the data for those contacts into your **Support Contract** Custom Table.

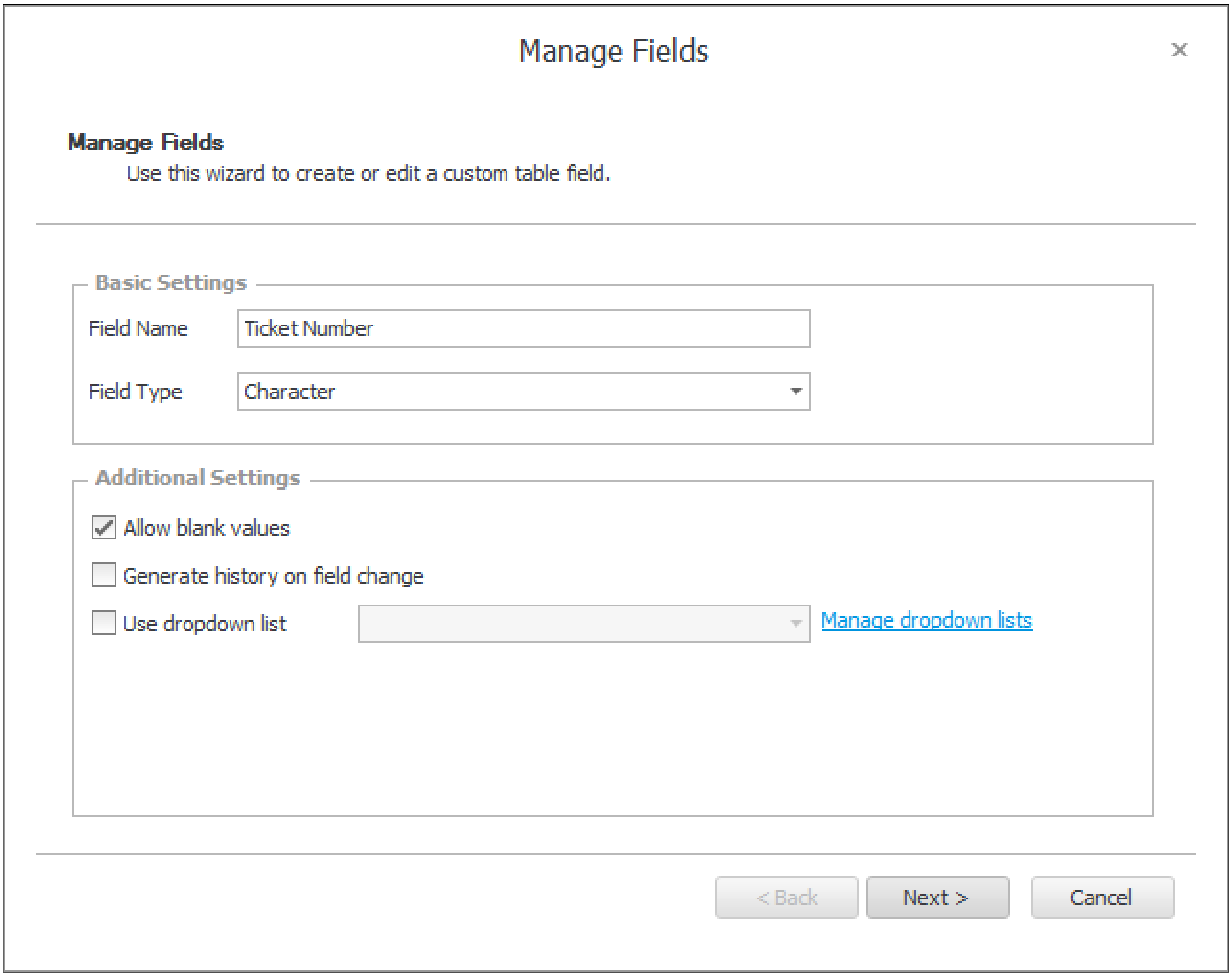
Sequential Fields

This very useful feature of Custom Tables allows you to automatically populate a field with the next number in a sequence when creating a record. This functionality is also known as auto-numbering. In the example we have been using, this would be very helpful in automatically assigning a Support Ticket reference. Any new or existing Character type field can be made into a Sequential Field. In the example below, we will look at creating a new Sequential Field.

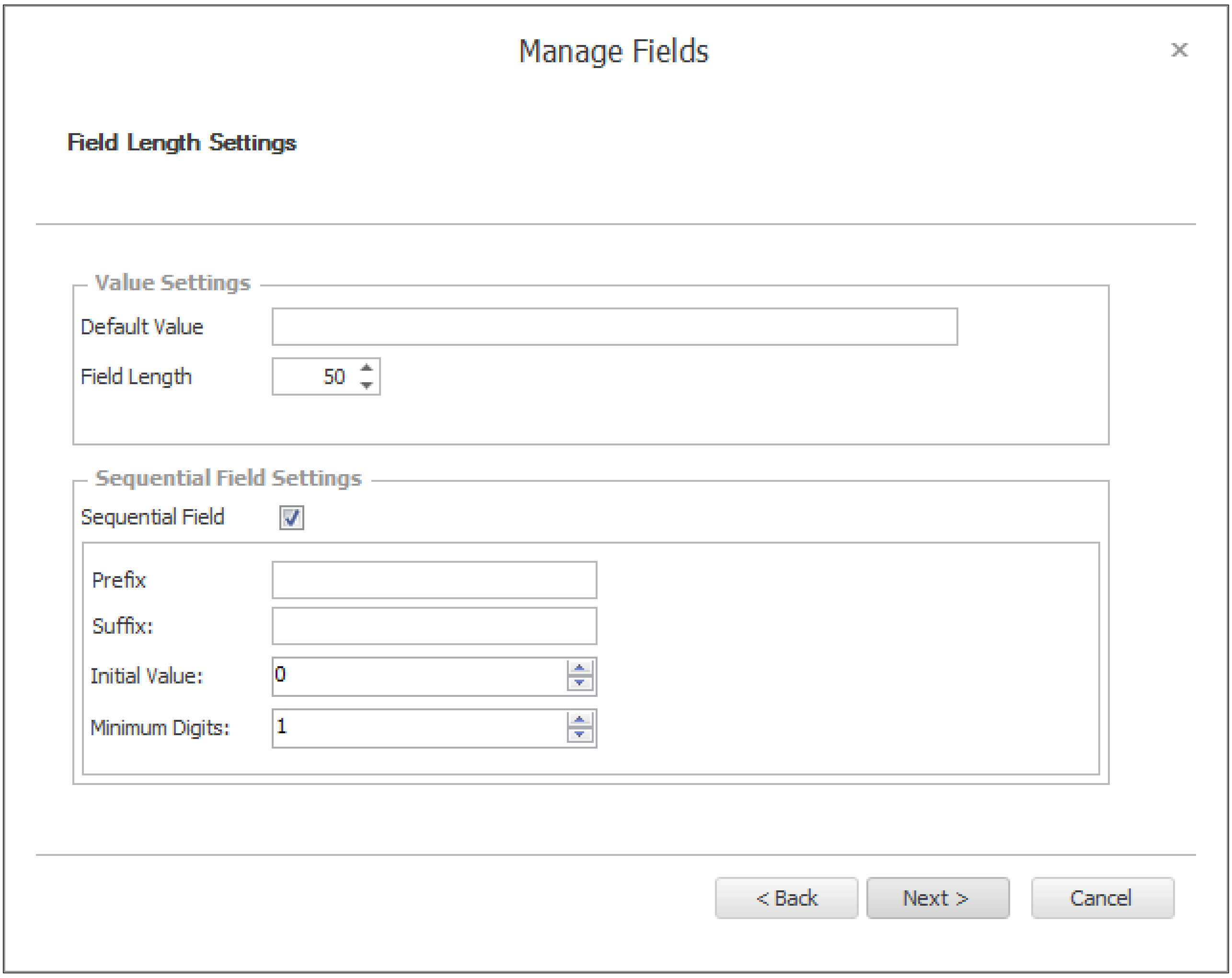
Creating Sequential Fields

To begin, click **Custom Tables** > **Manage Custom Tables**, then select a table from the **Load Table** dropdown.

Under **Field Management**, either select an existing Character field and click **Edit Field**, or click **Create Field** to create a new one.



Progress through the field settings and enable the **Sequential Field** checkbox.

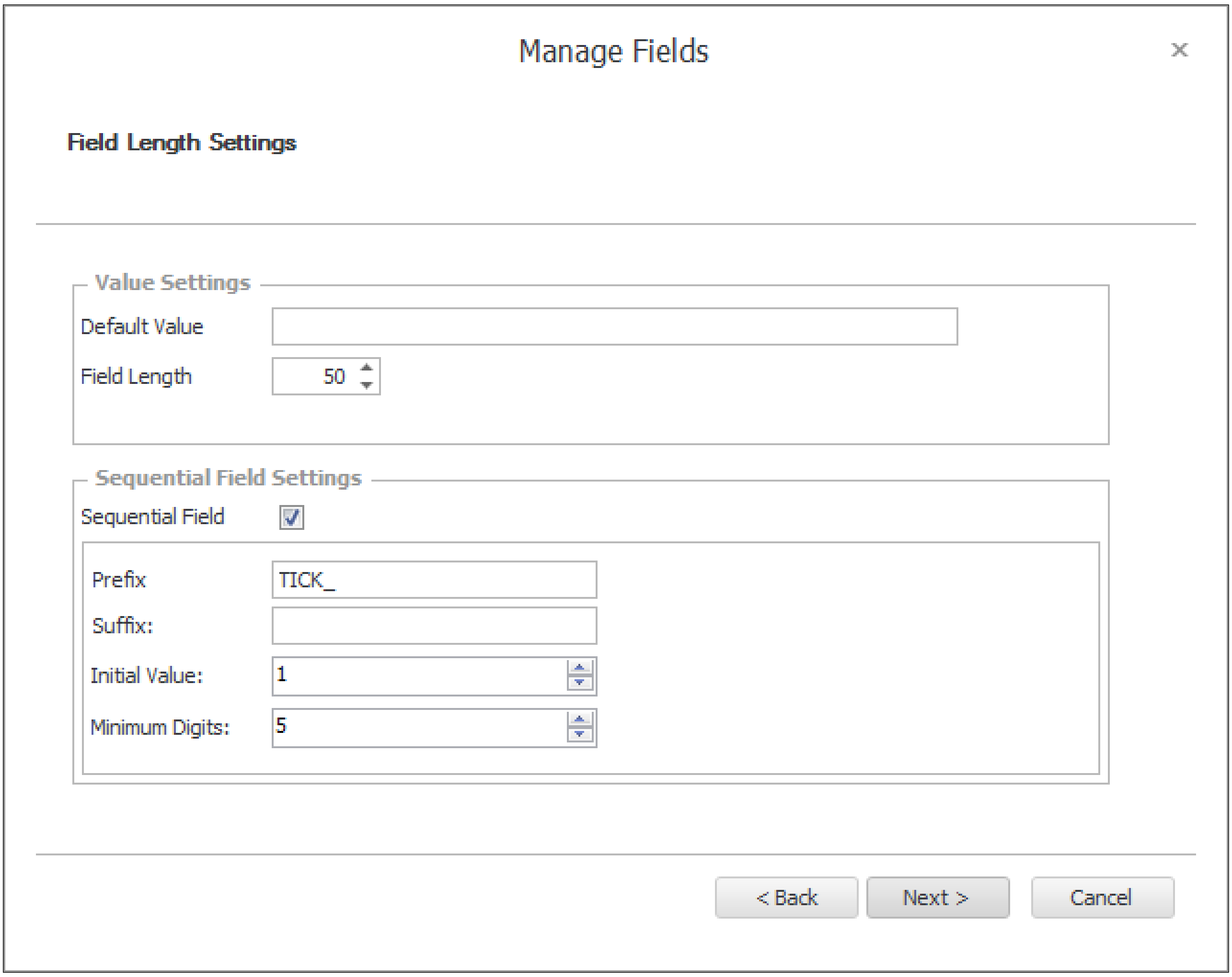


Enter a **Prefix** or **Suffix** if required.

Enter an **Initial Value**. Every time a new record is created, this will be incremented by **1**.

Select the **Minimum Digits** if the required number needs to be a certain length.

For example: Using the prefix **TICK_**, with the Initial Value of **1** and Minimum Digits of **5** will give the value **TICK_00001** on the first record.



Click **Next** twice then **Finish**. Make sure to add the Sequential Field as a column in your Custom Tables view.

Sequential fields will begin numbering from the **Next new record created**. If you have existing records (such as Support Tickets), these will **not** automatically receive sequential numbers.

If a customer has been using a field to manually enter a value (so let's say they have been manually adding in Support Tickets with TICK_00001 etc.) then this will affect the **Initial Value** when they edit the field and make it into a Sequential Field. The customer would want to check the value that they were currently up to, then set the Initial Value to the **next number in the sequence**. That way whenever they create new Support Tickets, the values will be set and increase correctly

Sequential Fields on Remote Databases

Remote databases are **unable** to keep track of the current sequence of numbers in the main (publisher) database. For this reason, Sequential Fields in remote databases will be assigned a random prefix to ensure they are not duplicates (NOTE: This is different to the prefix you can set when creating a field discussed above). These random prefixes can be changed by the remote user later. To do this:

1. In the remote database click **Custom Tables** > **Sequential Field Settings**.

2. A list of all sequential fields in the database will appear, allowing the random prefix to be changed.

Exercise

Create a **Sequential Field** for use within your **Support Tickets** Custom Table.

Once created, add this field to your **Layout** and **Default Columns**.

Add new Support Tickets into your database and test the sequential numbering.

Cascading Dropdowns

Custom Tables includes an oft-requested feature which can significantly enhance the Act! experience. This feature is called Cascading Dropdowns.

Cascading Dropdowns allow you to make the available values in a dropdown list depend on the value of another field. This functionality is also known as dependent dropdowns.

Let's take an example of recoding a Support Ticket. You may wish to create a dropdown to identify the product that the customer was calling about. Once the product has been selected, you may wish then to have another dropdown populate with the area of the program in the query, and make sure that the values available are specifically related to the product that was chosen. Finally, you could have yet another dropdown that will populate with the specific issues related to the area that was chosen. We will look at creating a similar example below.

NOTE: This functionality currently works in the Act! desktop client only.

Creating Cascading Dropdowns

To begin creating a cascading dropdown, you must **already have created** dropdown fields in your Custom Tables section. These dropdowns need to contain **ALL** the possible values that will be used. The process below looks at setting up which values will cascade under which circumstances.

For the purposes of our example, we have created the following dropdown character fields (all limited to list) with the values listed:

Product

- Act! Cloud
- Act! Desktop

Area

- Contacts
- Installation
- Logging in
- Web Browser

Issue

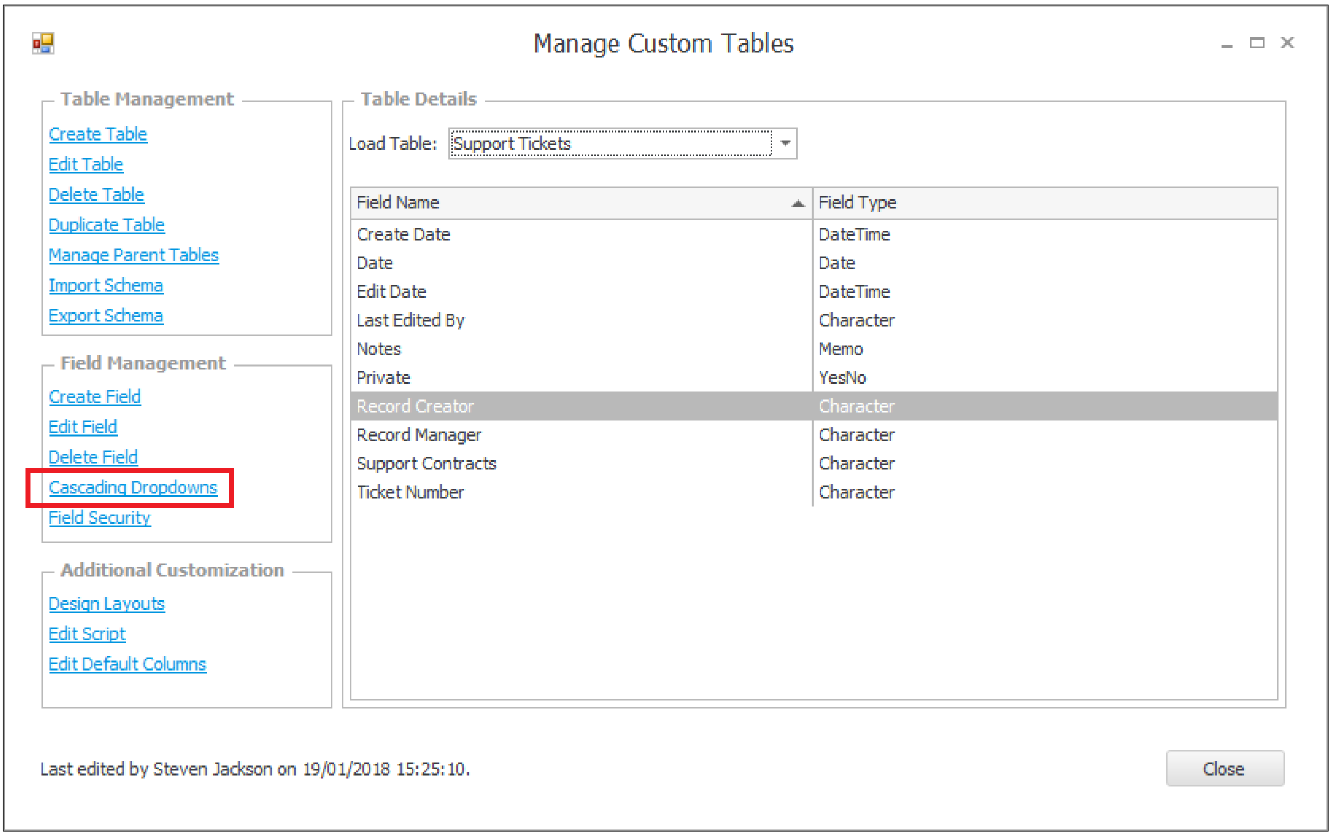
- Creating Contacts
- Deleting Contacts

- Disk Space
- SQL
- Forgotten Password
- Forgotten User Name
- Incompatible Browser
- Pop-up Blocker

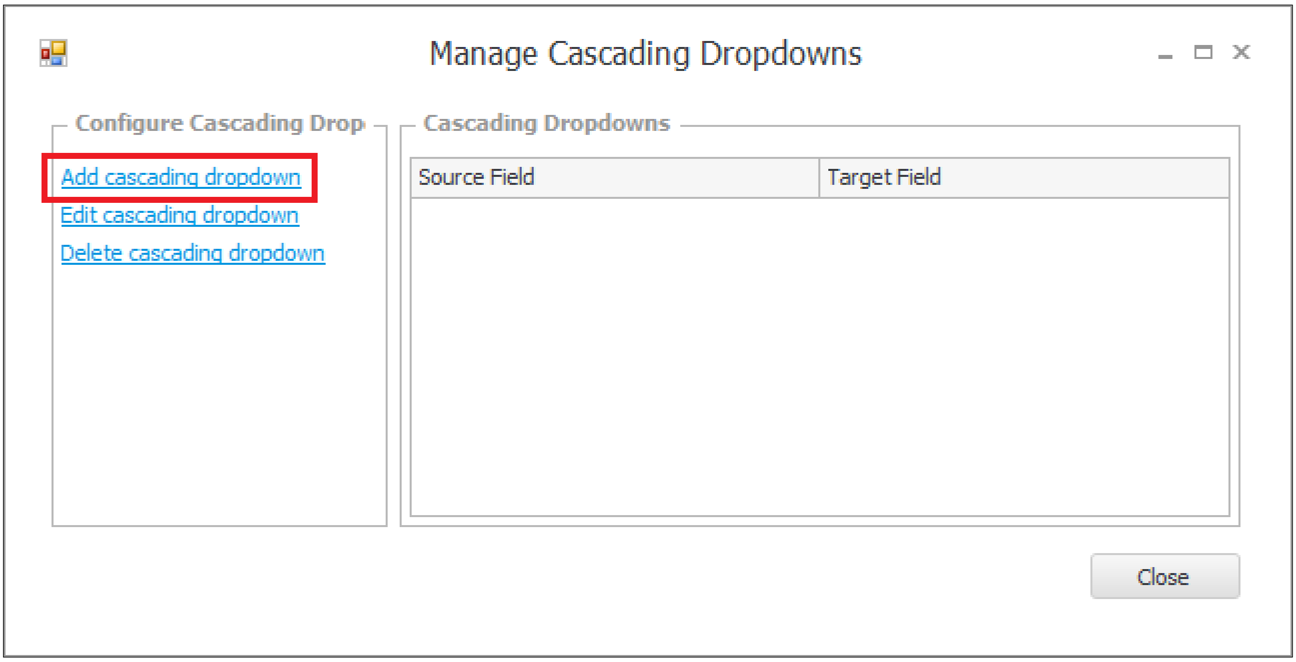
Now that these fields have been created, we can create the cascading rules.

To begin, click **Custom Tables** > **Manage Custom Tables**, then select a table from the **Load Table** dropdown.

Under **Field Management**, click **Cascading Dropdowns**.

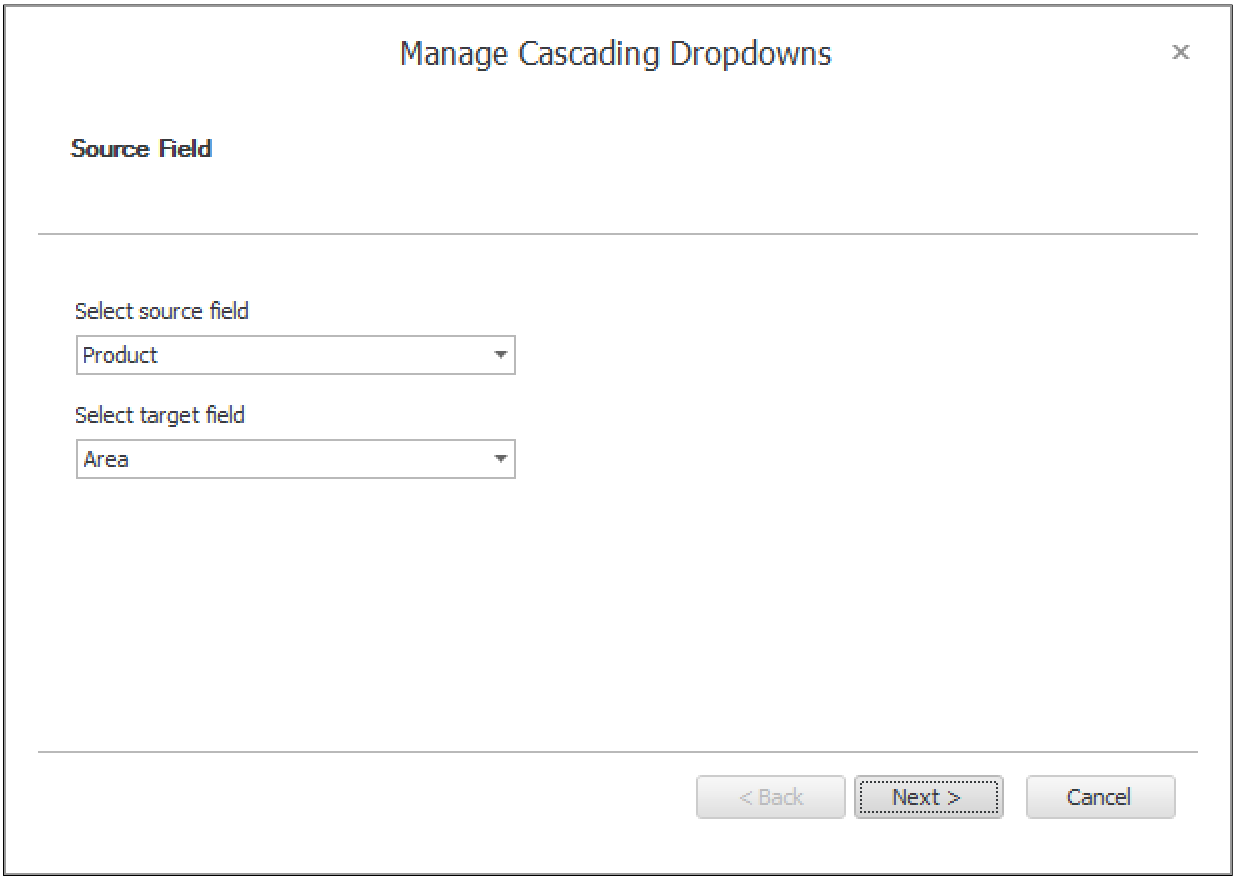


Click **Add Cascading Dropdown**.



Under **Select source field** select the field which the dropdown values will depend on.

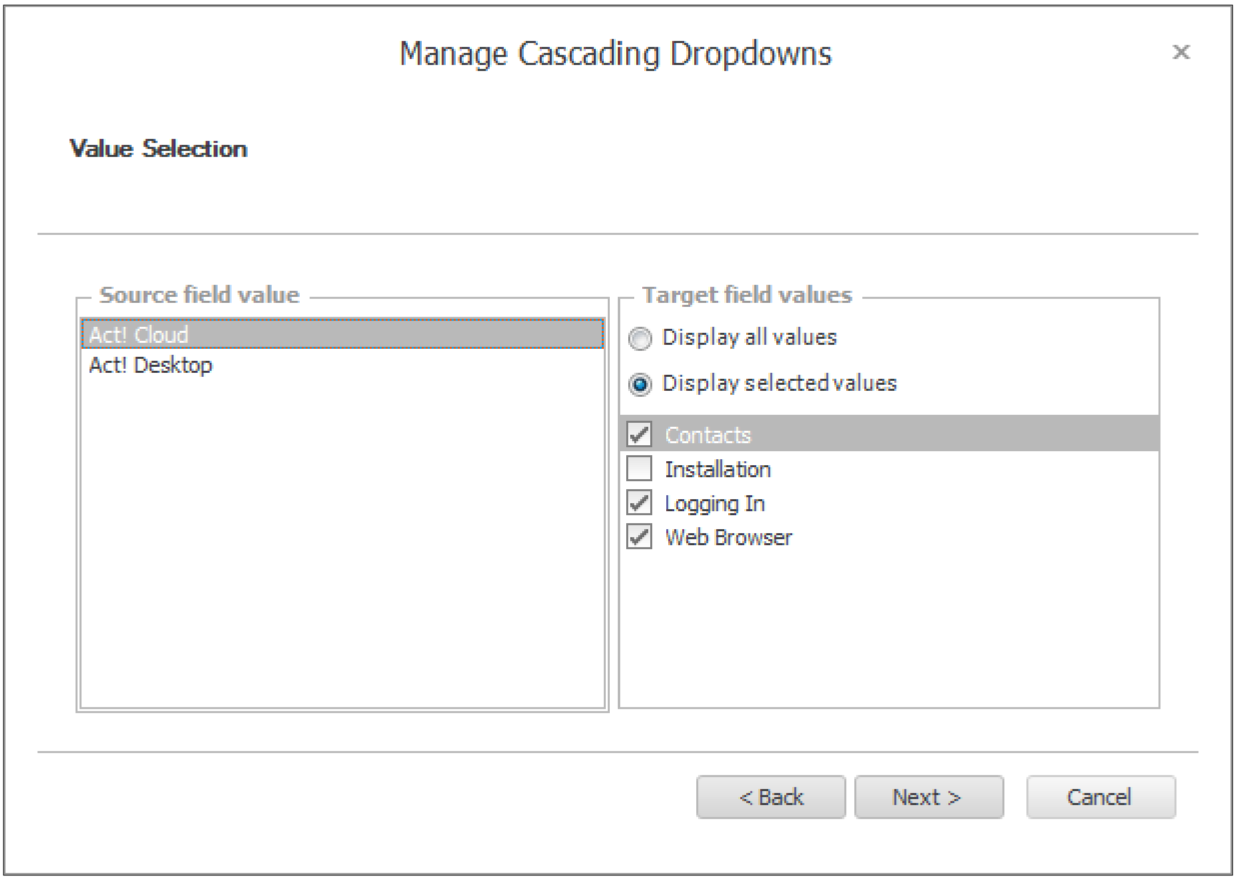
Under **Select target field** select the field the dropdown values will display in. Click **Next**.



Select a **Source field value**, then select whether to **Display all values** or **Display selected values**.

If **Display selected values** is chosen, tick each of the values to display when the source field matches the selected value.

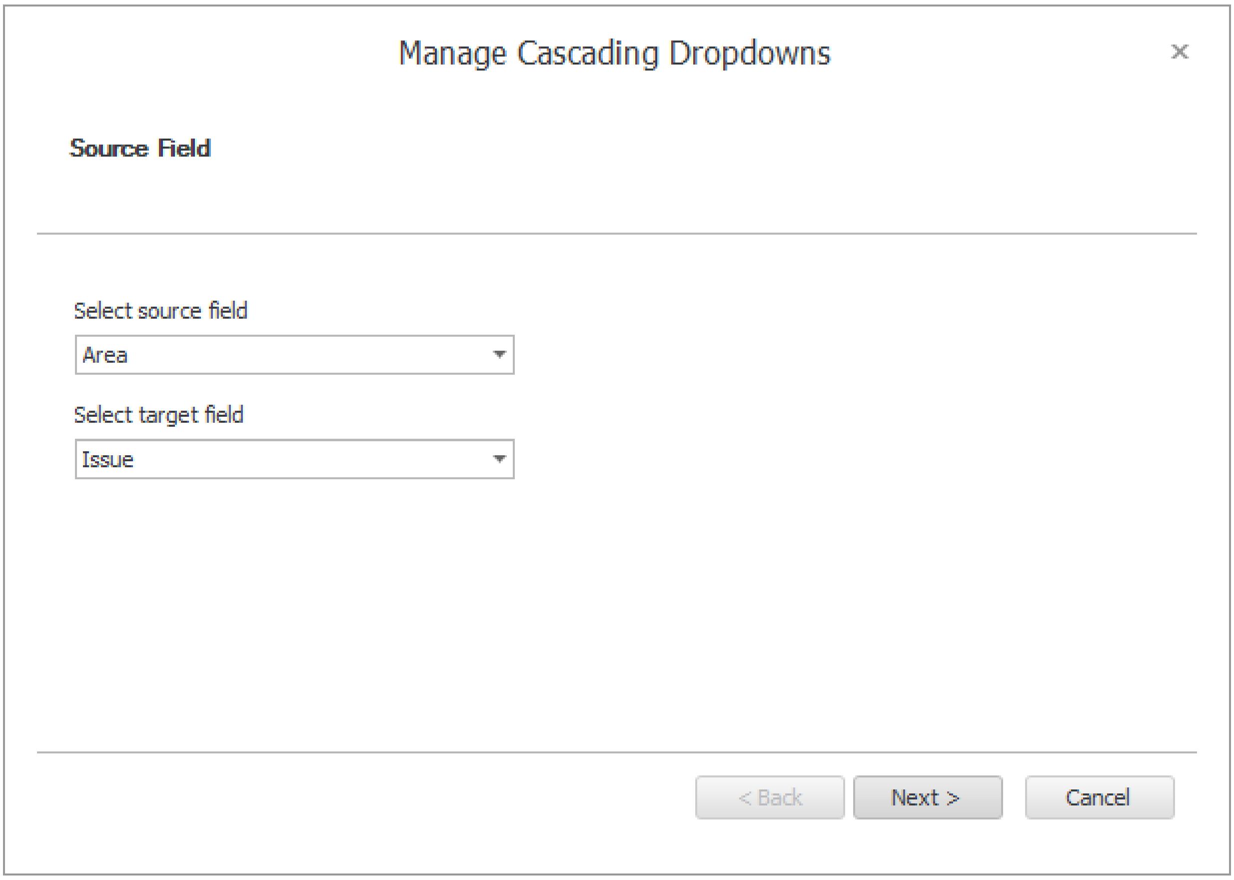
Repeat the process for other source field values. In our example, **Act! Cloud** can display **Contacts**, **Logging In** and **Web Browser**, whereas **Act! Desktop** can display **Contacts**, **Installation** and **Logging In**.



Click **Next** twice, then **Finish** once complete.

Whilst that one level of cascading will be suitable for most customers, we are now going to add a further level of complication.

Add another Cascading Dropdown, but this time we will use **Area** as the **Source field**, and we will use **Issue** as the **Target field**.



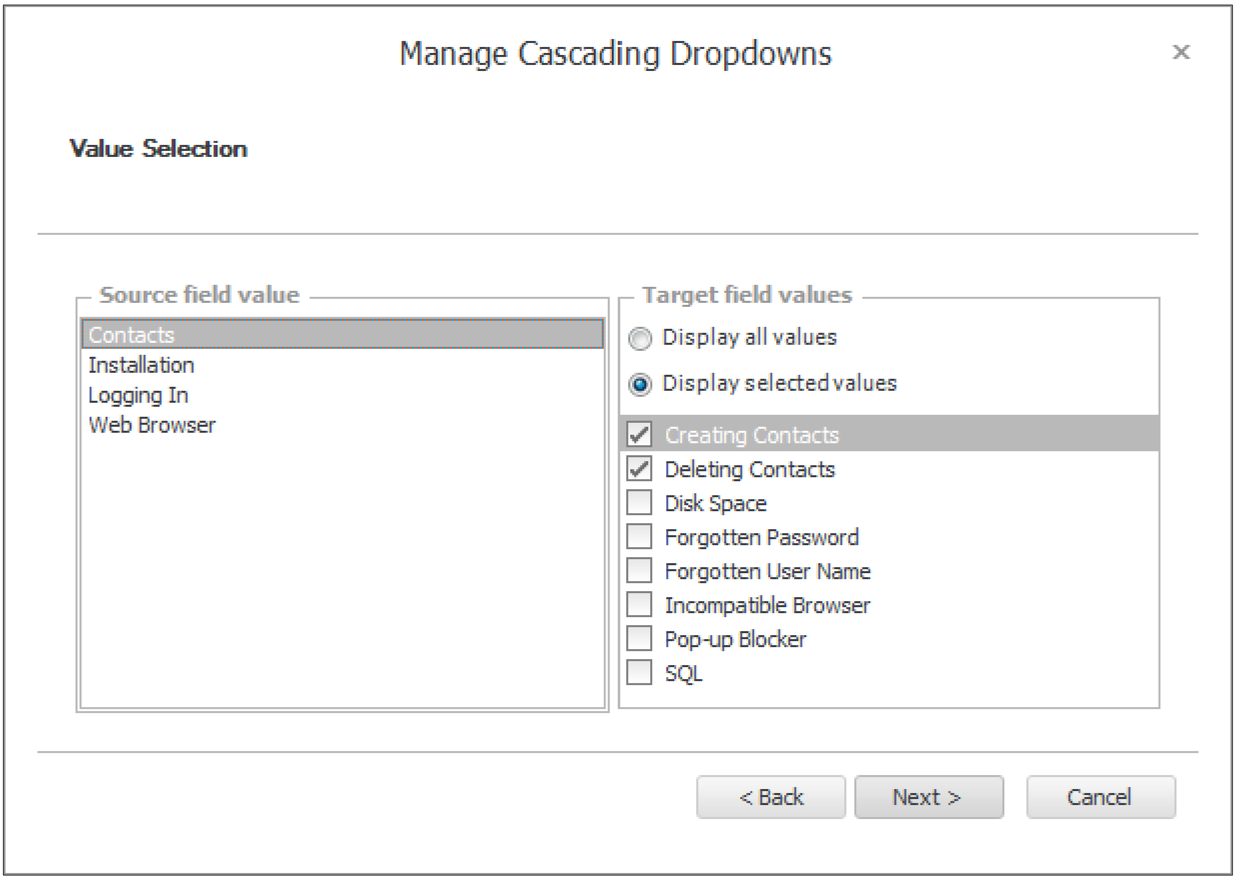
We will now set the following values:

Contacts will display **Creating Contacts** and **Deleting Contacts**.

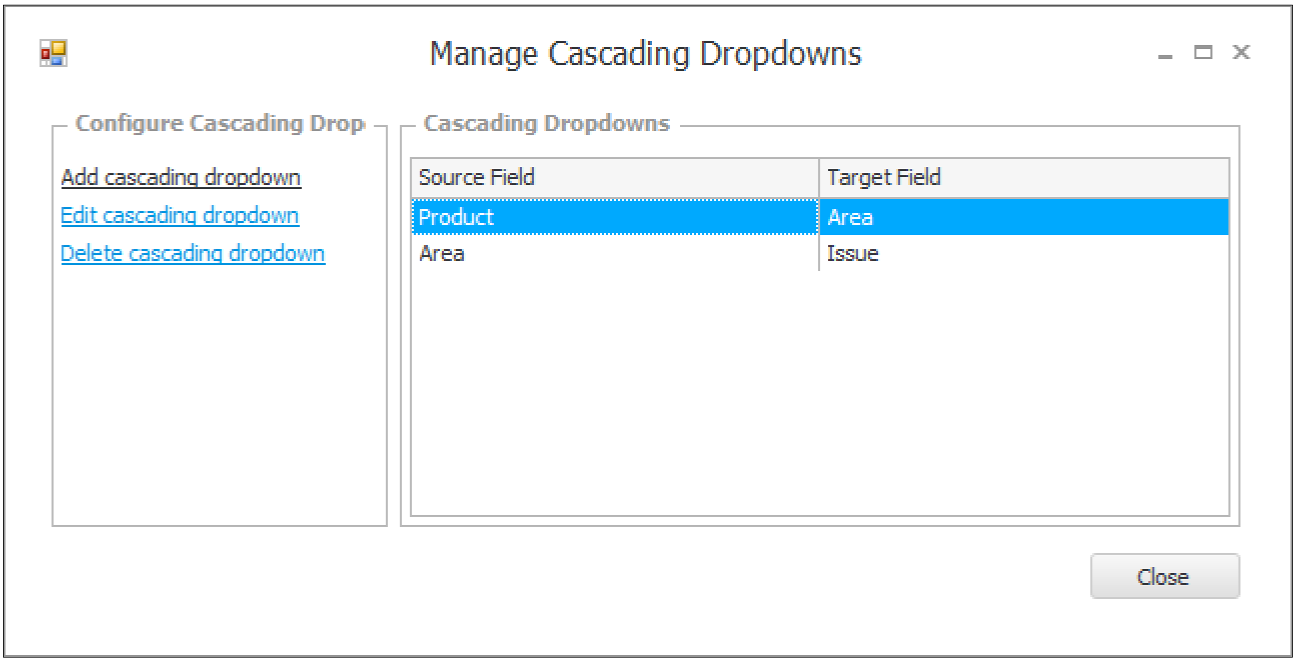
Installation will display **Disk Space** and **SQL**.

Logging In will display **Forgotten Password** and **Forgotten User Name**.

Web Browser will display **incompatible Browser** and **Pop-up Blocker**.



We will now complete the rest of the wizard. As can be seen, two cascading dropdowns now exist in our table.

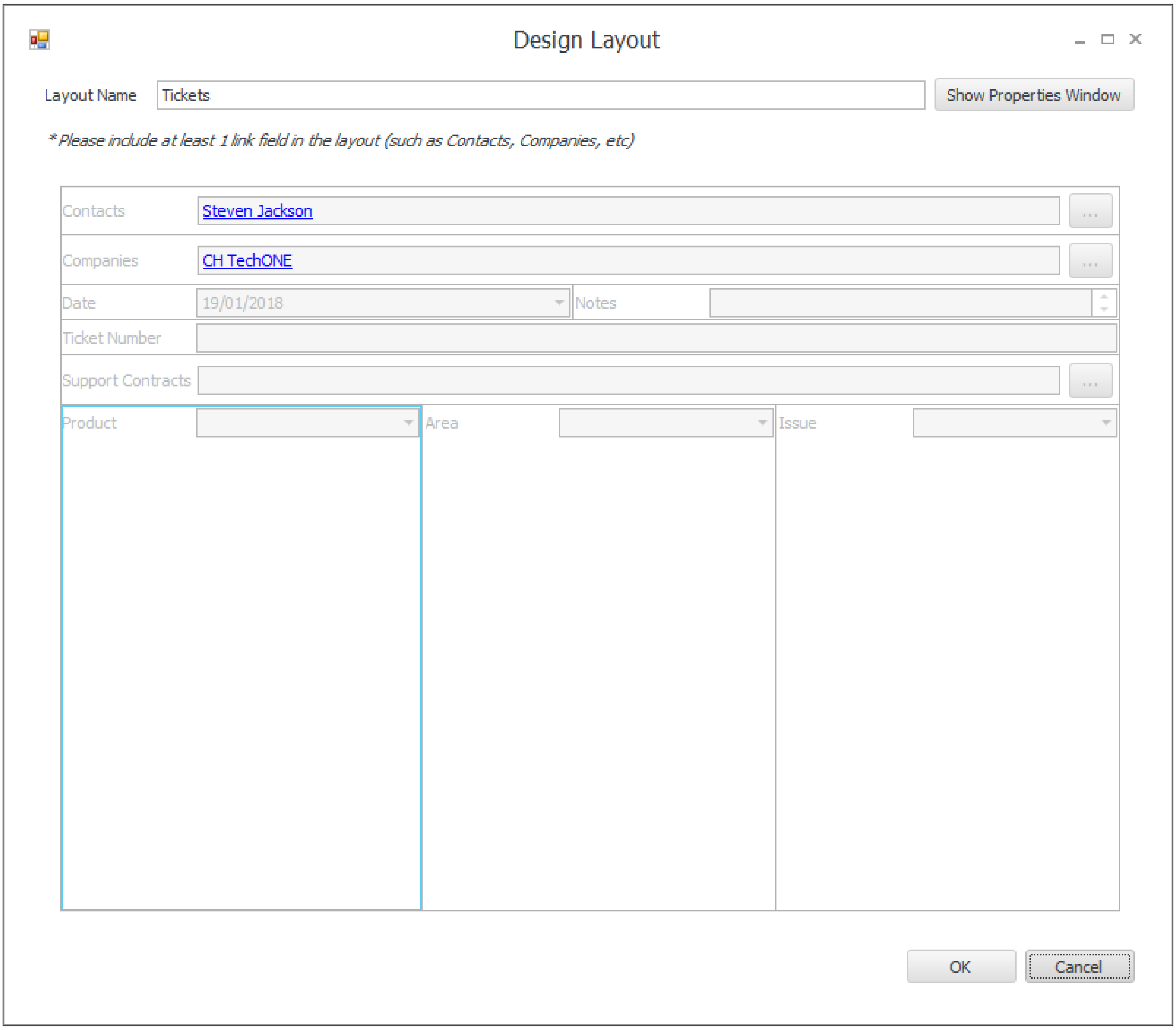


Working with Cascading Dropdowns

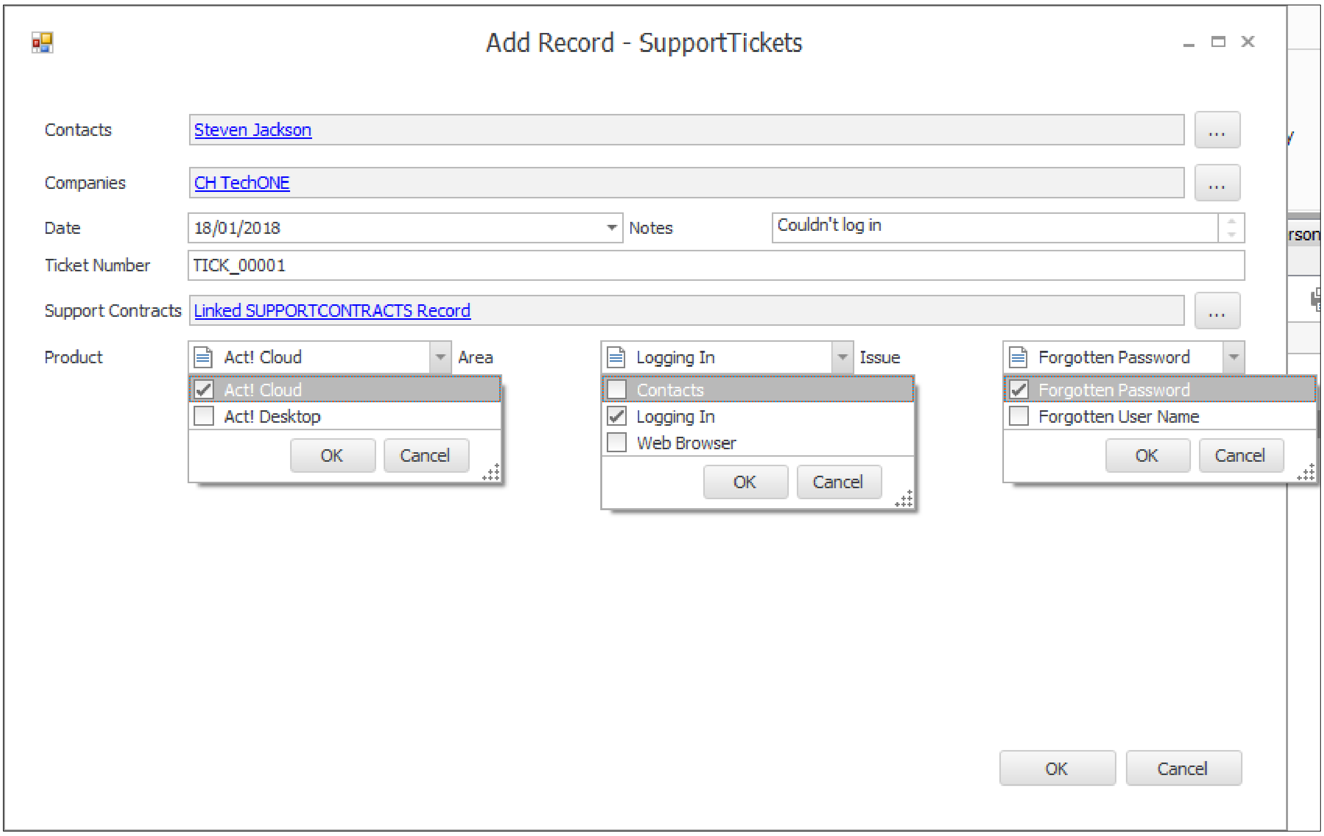
To actually make use of the cascading dropdowns that we have created, we need to add our new fields to the **Layout** of the **Custom Table**.

Do this by clicking **Custom Tables** > **Manage Custom Tables**, then from the **Load Table** dropdown, select an existing table. Finally click **Design Layouts** and choose the layout you want to edit.

In the example below, the layout now shows the three dropdown fields we created earlier.



Now if we create a new ticket, we will see the amended layout above, and we will be able to use our cascaded dropdowns correctly.



As you can see in the example above, all three dropdowns are cascading to each other correctly.

Exercise

Follow all the instructions under the subheading **Creating Cascading Dropdowns** above to thoroughly test this feature.

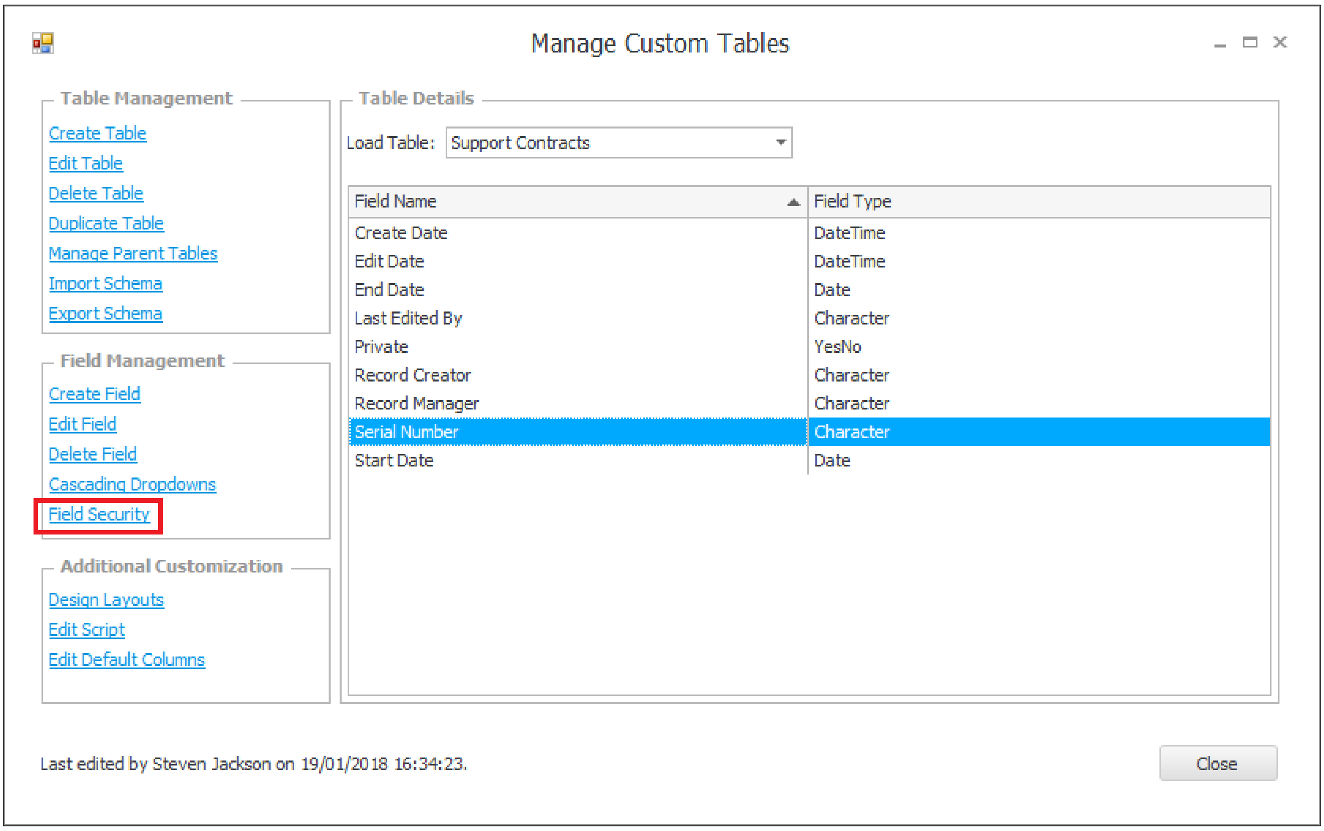
Field Security

Field Security allows you to control access to individual Custom Tables fields by Act! user. This functions identically to the standard field level security feature in Act! and has the same potential benefits to the customer.

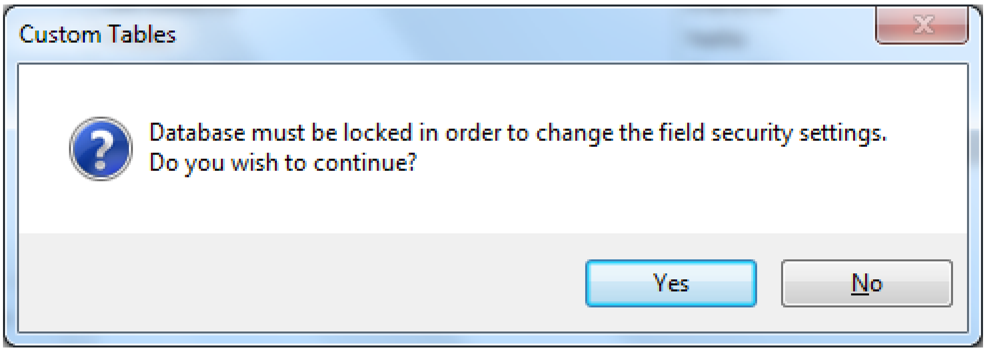
NOTE: This functionality currently works in the Act! desktop client only.

Setting Field Security

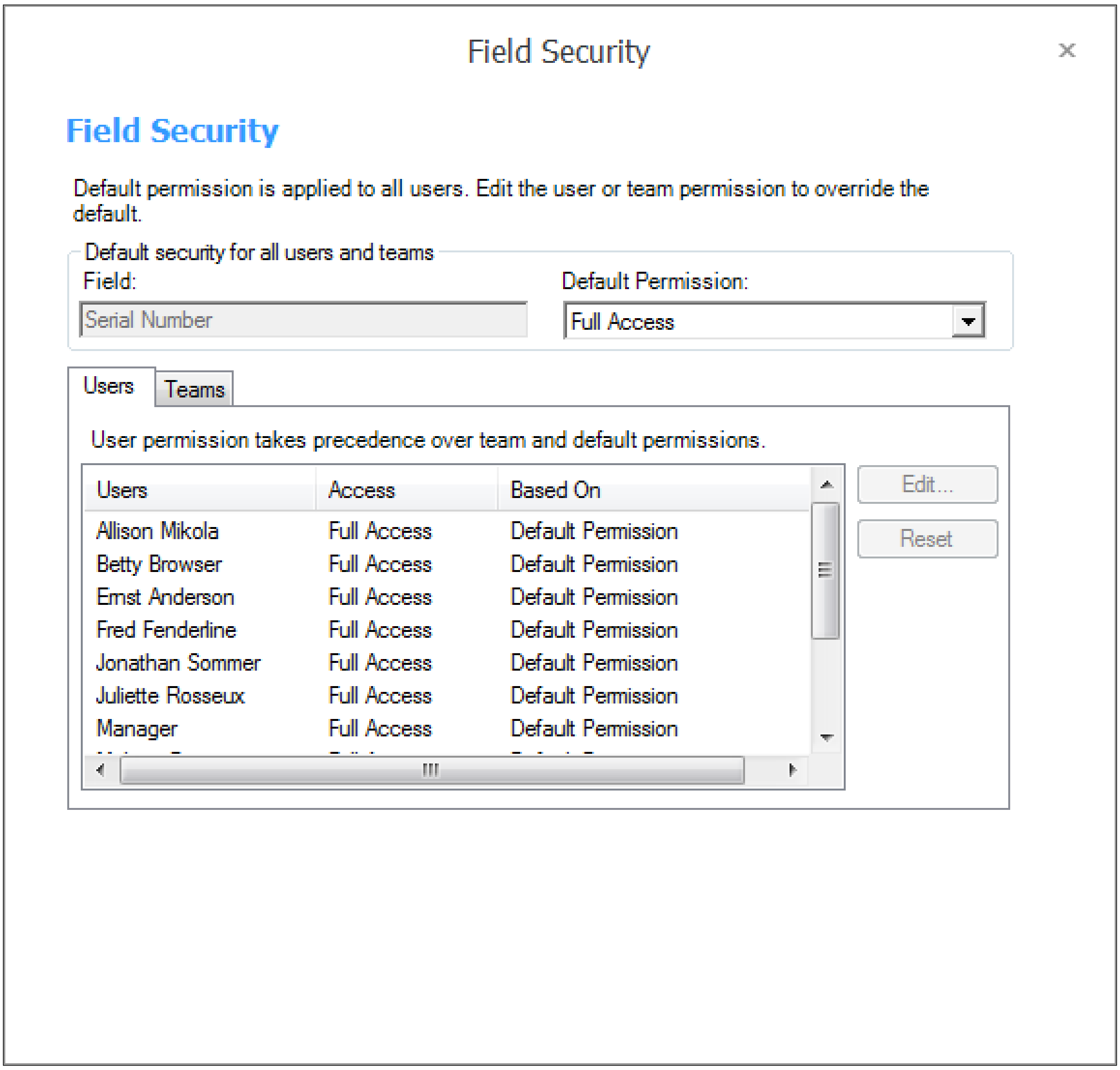
To begin, click **Custom Tables** > **Manage Custom Tables**, then select a table from the **Load Table** dropdown. Click the **field** you wish to set field security for, then under **Field Management**, click **Field Security**.



You will then be advised that the database needs to be locked to continue.



Once you have clicked **Yes** you will be presented with the **Field Security** screen. This works in exactly the same way as the standard Field Security screen already available within Act!.



Exercise

Make sure you have created **multiple users** in your database.

Choose a field in your **Support Tickets** Custom Table. Set access to **Read Only** for one user, and **No Access** for another. Log in with these users and test adding a new Support Ticket.

Advanced Query Editor

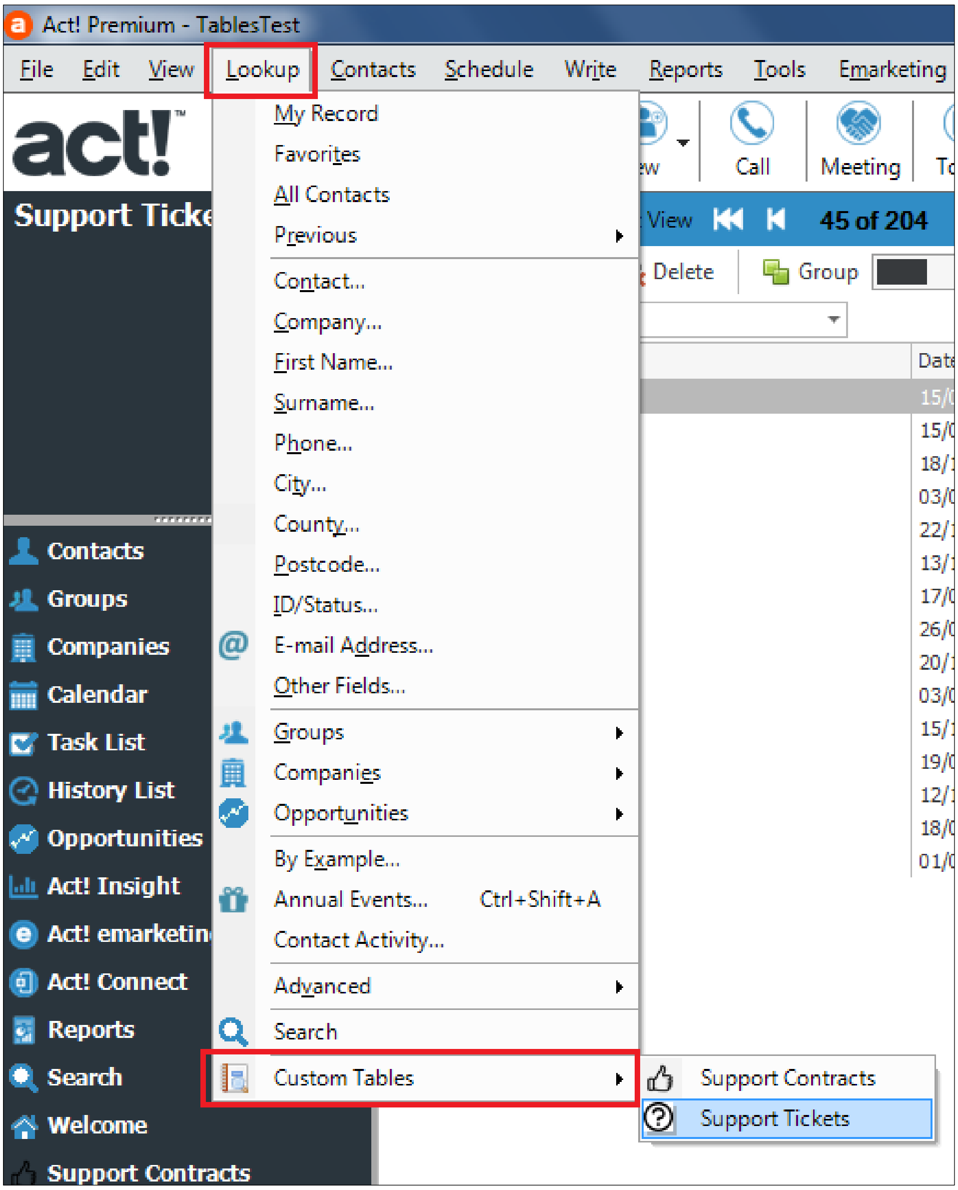
The Advanced Query Editor provides a powerful way for you to search custom tables which have been added to the navigation stackbar. This functions in the same way as the standard Advanced Query Editor in Act!, but once the queries are created, they will appear at the top of the Custom Table once selected from the navigation stackbar.

We will look at how to create a query below, then how to apply it to your Custom Table.

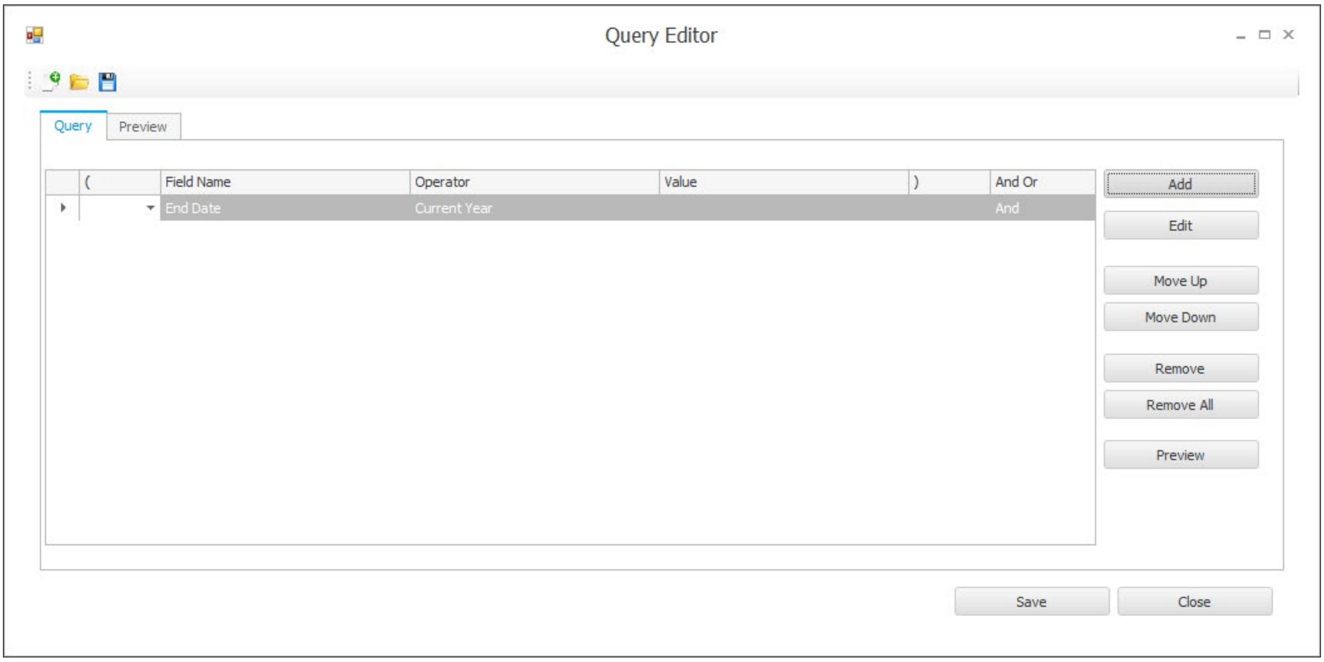
NOTE: This functionality currently works in the Act! desktop client only.

Creating an Advanced Query

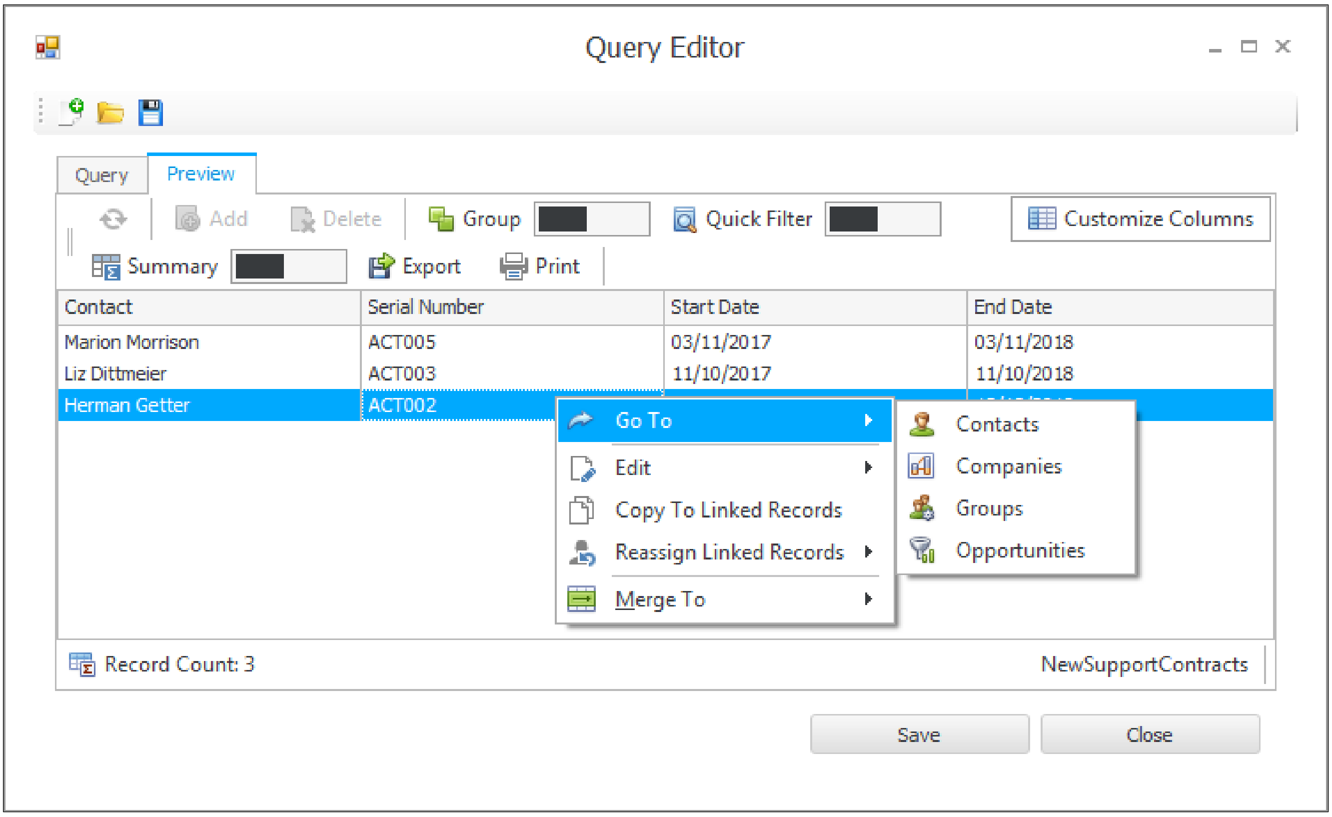
To begin, click the **Lookup** menu in Act!, then click **Custom Tables** and select a table.



Click **Add**, then select the **Field Name**, **Operator** and **Value** required, just as if you were creating a standard Advanced Query in Act!. In our example, we will look for any customers who have a **Support Contract** that expires this year (so the **End Date** is the **Current Year**).

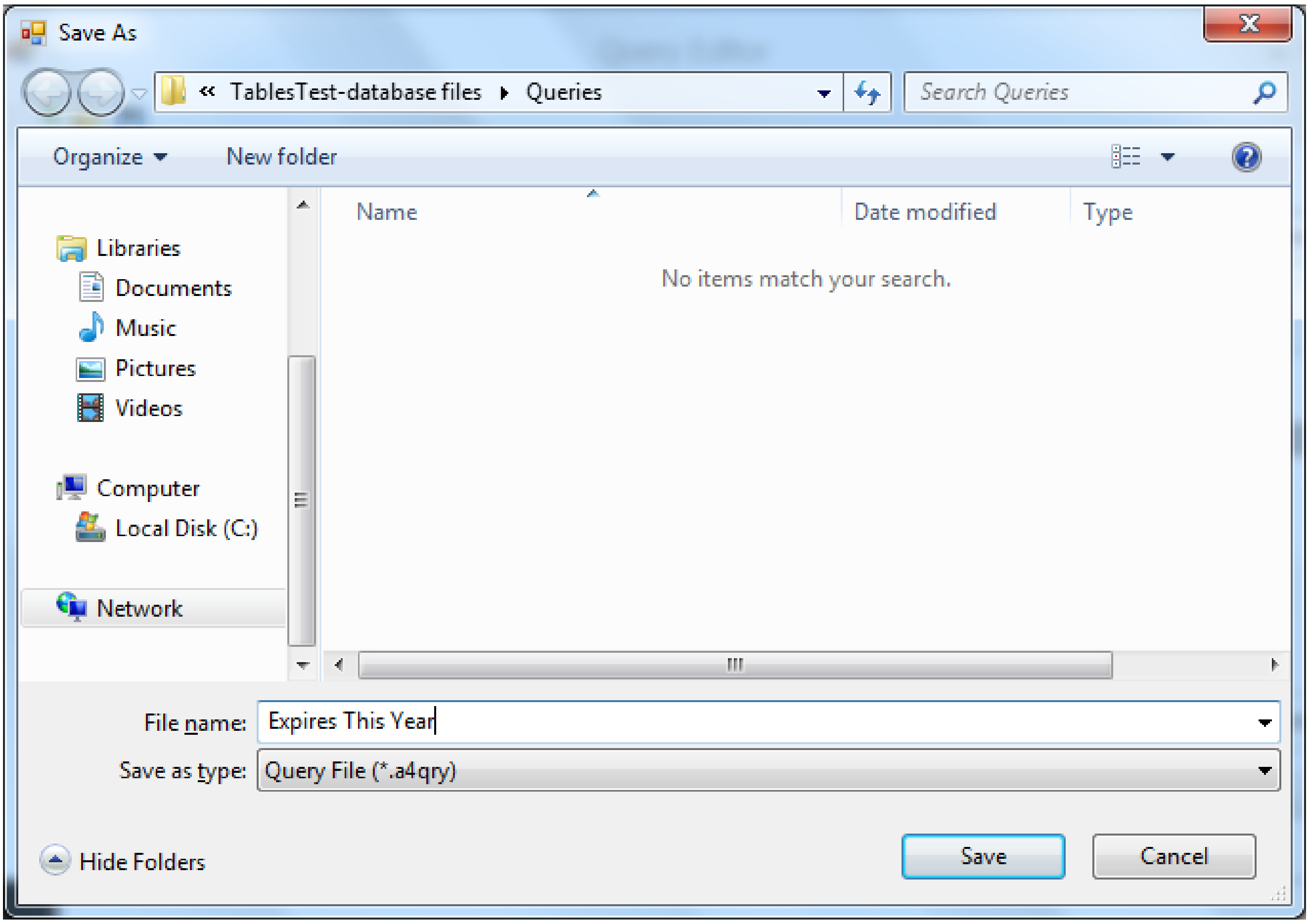


You can click **Preview** to show the results.



From here you can **right click** on the records to perform functions such as **Merge To** which we have already covered in this training, or you can click **Go To** if you want to jump straight to that area of the program. Effectively the **Preview** option is your actual results which you can begin working with.

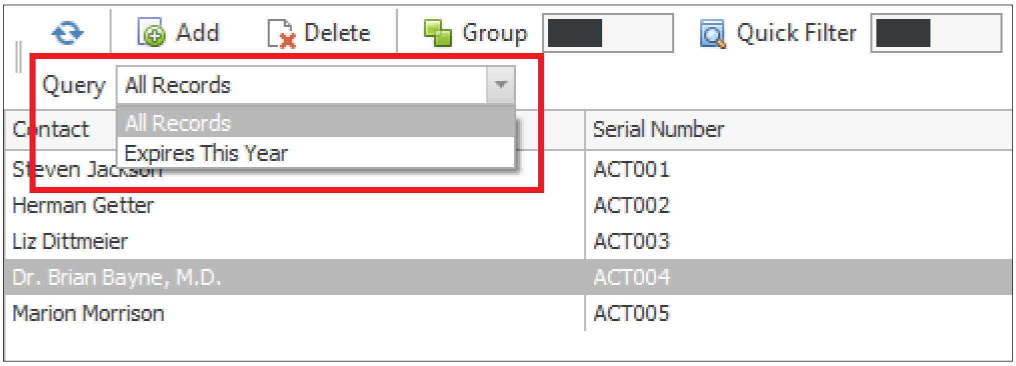
On top of that, you also have the ability to **Save** the query by clicking the Save button. When you do so, you are prompted to give the query a name.



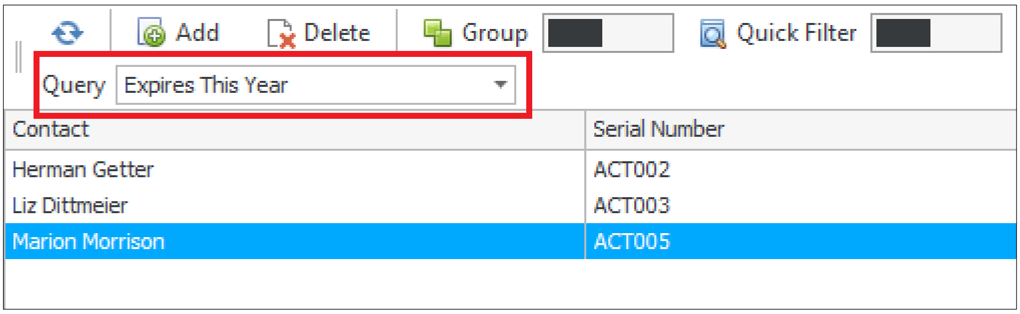
Saving a query is important for actually working with the advanced query as we can see below.

Viewing a Saved Query

Now that you have saved a query, you can quickly and easily use these when working within your Custom Table. To do so, select the Custom Table from the **Navigation Stackbar**. At the top of the screen there is a dropdown menu called **Query**.



The dropdown will show all of the advanced queries you have saved. To show the results, simply click the appropriate query in the dropdown list.



Select **All Records** from the Query dropdown to return to the full list of records.

Exercise

Create an **Advanced Query** to find all of your **Support Contracts** that will expire in month of your choosing.

Create an **Advanced Query** to find all of your **Support Tickets** that have been created on month of your choosing.