TOPLINE DASH

Work Effectively. Analyze interactively. Report instantly.

User Manual

TopLine Results Corporation 2008-2009

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TopLineDash

Online Help

TopLine Dash is an add-on product for ACT! by Sage that gives you the ability

Installation   Dashboard Elements   Dashboard Panels

Advanced Functions   Tutorials   Dashboard Editions

FAQ

Welcome

Welcome to the TopLineDash 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.

Ask Someone

If you're unable to find what you're looking for in this help system, try these alternative resources, or contact our customer support department.

Most popular pages

- Welcome
- Activities
- Features
- ACT! Dashboard
- Dashboard Elements
- Panel Wizard Icon
- Rows and Columns
- New Icon
- List Filtering
- Change Dashboard Title

Home > Welcome > Features

TopLine Dash Features

Dashboard Wizard: Quickly set up your dashboard parameters and filters using our Dashboard Wizard.

Customizable Views: Add any database fields to your list views. Quickly save or reload your favorite dashboards. View opportunities and activities side-by-side. Copy or drag and drop dashboard panels and columns. Select different users for each panel. Move the legend as needed. Using ACT! 2010, 2009 or 2008 v10.0.2 and TopLine Dash v7, you can now view custom tables.

Contact Details: Preview an editable contact layout by clicking on any lists of activities, opportunities, queries, histories, notes or products.

Calendar: View and edit one or more daily, weekly or monthly calendars.

Activities: Create customized activity lists or drill-down pie or bar graphs.

Opportunities: Create customized opportunity lists or drill-down graphs, auto-calculate counts, gross margins, weighted totals and actual totals. Create follow-up activities directly from your pipeline report.

Contact Lists: List your most important dynamic or ad-hoc group of contacts and edit them.

Histories: View, filter and sort by history types and create history summary drill-down graphs. Right click to email history items.

Products: View your selected products by sales stages, date range in a list or drill-down graph.

Queries: Perform powerful query lists and corresponding graphical views.

Filtering: Filter by date type, activity type, regarding keyword, sales stage, process, group or query.

Sorting: Sort by any selected field in your database including: date, priority, regarding, details, ID/status, city, state, probability, amount, stages, etc.

Interactive: Update the dashboard by selecting filters and sorting on the fly. Update multiple opportunities and activities simultaneously. Create look-ups from your notes, history, activity, opportunity or contact lists. Edit field values in contact lists and contact details.

Reporting: Print your favorite dashboard panels as a PDF and share with others. Create read-only dashboards. Email selected histories.

Key Performance Indicators (KPIs): View and filter your sales metrics on activities, histories or opportunities, e.g., number of calls, meetings, to-dos, emails, quotes, new opportunities, calculates win/lose ratios, average sales and total sales for selected users and more.

Sum/total: Sum/total for any numeric or currency field in a dashboard list view.

What's New Report: View the last synchronization, new contacts, histories, notes, opportunities and activities for each user.

Export to Excel: Export activities, notes, histories, opportunities, contacts and KPI statistics to MS Excel

Work effectively

- **Centralize and organize** all key activities, opportunities, histories, notes and contacts in one or more interactive and graphical dashboard views. Align opportunities with activities to ensure proper follow-up.
- **Manage your database —** Realign territories. Reschedule multiple activities or opportunities at once. Edit contact records and histories.
- **Communicate faster** by emailing one or more histories directly from the dashboard.
- **Preview contact details —** The drill-down links activities or opportunities directly to the contact details allowing you to easily update your database.
- Create **follow-up activities** from your pipeline list.

Analyze interactively

- **Compare, analyze and drill down** on activity, history, opportunity, product or query graphs (including sum and average).
- **Monitor and quantify** sales performance with key performance indicator (KPI) statistics.
- **Set targets** for activity and opportunity levels to identify gaps and adjust sales plans. **Analyze your pipeline** by products using targeted groups such as customers or prospects.
- **View multiple ACT! calendars** inside the dashboard.
- ?Choose from **many powerful dashboard templates** and **easily customize** your own dashboards using our Dashboard Wizard. Drag and drop dashboard panels and fields.

Report instantly

- **Share your dashboard** as a report in PDF format.
- **Export** any list to MS Excel.
- **Automate your dashboard reporting** with TopLine Dash Alerts. Refer to TopLine Dash Alerts datasheet for additional information.

What's New in Version 7

TopLine Dash v7 is the most powerful and easy-to-use dashboard yet! It offers the ability to report on custom tables created in ACT! 2009 or 2008 v10.0.2 .

Custom tables

- Select your standard or custom tables. Quickly set up your dashboard parameters and filters using the **Dashboard Wizard.**
- **Switch** between lists and graphs without changing parameters.

Powerful graphics and analytics

- **Drill down** on graphs and lists.
- **Graph** your standard and custom tables against any fields such as ID/Status, referred by, territory or any custom field.
- **Sum and average** for all graphs.

Greater flexibility

- **View columns** from related custom or primary table fields **side-by-side.**
- **Filter** by dates or field query **on MULTIPLE fields!**
- **Export** to MS Excel format and **print** to PDF**.**

Integration

- TopLine Dash v7 integrates with **TopLine Designer** allowing you to easily save lists and produce powerful graphical views for custom tables.
- TopLine Dash v7 integrates with **TopLine Alerts** for report automation.

Home > Welcome > ACT! Dashboard

ACT! Dashboard

TopLine Dash was created since version ACT! 2005 and is compatible with all versions of ACT! for Windows. TopLine Dash has very strong analytical features to build complex reports beyond activities, opportunities or contacts. There are many more dashboard type in the TopLine Dash, features and filters as well as reporting is far more robust than the one available in the ACT! Dashboard. Also TopLIne Dash is the ideal tool to report on custom entities (tables) which can be created using TopLine Designer. In addition TopLine Dash allows for interactive that cross over multiple entities, for example you can view Opportunities, Activities, Contacts and subentities side by side in the same view.

Twenty most important differences and similarities between ACT! dashboard and TopLine Dash	TopLine Dash	ACT! dashboard
Dashboard Types		
Activity dashboard	✔	✔
Opportunity dashboard	✔	✔
Product dashboard	✔	
Notes dashboard	✔	
History dashboard	✔	
Key Performance Indicator (KPI) dashboard	✔	
Contact and company dashboard	✔	✔
Calendar dashboard	✔	
Dashboard Features		
View multiple user data	✔	✔
Filter lists or graphs by groups	✔	
Filter lists or graphs by queries	✔	
Customize list with fields from activities, opportunities, contacts and histories side-by-side	✔	
Create lists with totals for number and currency fields	✔	
Highlight any list items to preview the contact layout	✔	
Export any list to MS-Excel	✔	
Print to PDF	✔	
Schedule dashboard PDF reports to be emailed automatically	✔	
Mass update content within the dashboard	✔	
View advanced analytics using pivot tables (e.g. activities by ID/Status or opportunities by Referred by etc.)	✔	
Dashboard is viewable using ACT! for Web		✔

Detail comparison between TopLine Dash and ACT! dashboard	TopLine Dash	ACT! dashboard
Filters		
Filter by any field appearing in the dashboard		
View data for multiple users	✔	✔
Filter by dates, priorities, types, stages, status, process and any other field in the list view	✔	✔
Filter by groups	✔	
Filter by queries	✔	
Reporting		
Export to MS-Excel	✔	
Print to PDF	✔	
Send reports automatically (with TopLine Dash Alerts or TopLine Server Suite)	✔	
Copy image to clipboard		✔
Interactive		
Sort by fields	✔	✔
Drill downs from graphical views	✔	✔
Go to contact(s) interactively	✔	✔
Edit inside the dashboard	✔	

Set target for activities or histories	✔	
Set targets for opportunities	✔	✔
Highlight any opportunities, activities, histories or notes in order to preview the contact layout	✔	
Projections by period of time, Referred by, ID/Status or any other Contact field	✔	
Advanced drill down	✔	
Customization		
Create, duplicate, resize and customize multiple dashboard panels	✔	✔
Drag and drop panels for easy duplication and set-up	✔	✔
Protect your dashboard with read-only feature	✔	✔
Customize lists with fields from activities, opportunities, contacts and histories side-by-side	✔	
Toggle between list view and graphical views	✔	
Alerts		
Send PDF dashboard reports automatically	✔	
Send email alerts for opportunities using ACT! field contents	✔	
Send email alerts for specific activity conditions	✔	
Send email alerts for specific history conditions	✔	
Advanced Analytics		
Create multiple advanced queries per field		
Create queries by contacts or opportunities	✔	
Filter by queries or groups	✔	
Rescale graphical details using smart breaks	✔	
List totals for number and currency fields	✔	
Make projections using line graphs	✔	
View graphical funnel reports	✔	
Ease of use		
Use dashboard interactively	✔	✔
Save time using dashboard wizard	✔	
Rename dashboard on the fly	✔	
Drag and drop panels within a dashboard	✔	✔
Add dashboard or new panel in one click	✔	
Select your favorite dashboards within one click	✔	
Others		
Create "read only" dashboards	✔	✔
Compatible with Citrix environment	✔	✔
Share dashboard with other ACT! users	✔	✔
Sync your dashboards with other users	✔	✔
Activity Dashboard		
Graph or list selected users activities	✔	✔
Choose columns from activity fields	✔	✔
Choose columns from the contact and company fields	✔	
Filter activities by types, priorities, date ranges, and users	✔	✔
Export activities to MS-Excel	✔	
Mass updates of activity fields	✔	
Drill down applies to single bar	✔	
Highlight any activities in order to preview the contact layout	✔	
Group your activities by ID/Status, Referred by or any contact field	✔	
Set targets for users activities	✔	✔
Calendar Dashboard		
View multiple interactive calendars	✔	
View calendars by day, week or month	✔	
Select users' calendar	✔	
Schedule or reschedule within the calendar	✔	

Opportunity Dashboard		
Choose fields from the opportunity table	✔	✔
Filter opportunities by process, stage, status, users	✔	✔
Filter opportunities by close date, open date and create date	✔	
Filter opportunities by selected group or query	✔	
Create opportunity queries	✔	
View opportunity totals in lists	✔	
Choose opportunity fields and contact fields side-by-side	✔	
Choose opportunity fields and last history side-by-side	✔	
Choose opportunity and next activity fields side-by-side	✔	
View your opportunities per product	✔	
Mass update opportunity fields	✔	
Create follow-up from opportunity	✔	
Opportunity totals in graphs	✔	
Top opportunities limited to 10		✔
Graphical pie charts and bar charts	✔	✔
Highlight any opportunity in order to preview the contact layout	✔	
Product Dashboard		
Graph or list views by products	✔	
View product opportunity totals	✔	
Highlight any product in order to preview the contact layout	✔	
Notes Dashboard		
View Notes by date range	✔	
Delete Notes from list	✔	
Highlight any Notes in order to preview the contact layout	✔	
Go to contacts from Note list	✔	
History Dashboard		
View "What's New" dashboard (Last 7 days contacts, notes, histories, emails, new opportunity, etc.)	✔	✔
Filter by history type and any field available in the history	✔	
Sort by history types, dates or any fields	✔	
View history details	✔	
Graph histories	✔	✔
Export histories to MS-Excel	✔	
Delete histories	✔	
Update history fields	✔	
Email history content	✔	
Highlight any history in order to preview the contact layout	✔	
Monitor synchronization status	✔	
Key Performance Indicator Dashboard		
Opportunity Key Performance	✔	
Activity Key Performance	✔	
History Key Performance	✔	
Export KPIs to MS-Excel	✔	
Contact and Company Dashboard		
View contact lists	✔	✔
Create contact query lists	✔	✔
Graph all your queries by any fields (e.g. ID/Status, Cities, Referred by etc.)	✔	✔
Company lists	✔	
Total numeric and currency fields	✔	
Export contact query list to MS-Excel	✔	
Highlight any contact in order to preview the contact layout	✔	

See also

Features

Home > Installation

Articles in this section

This section will demonstrate how to:

- Install TopLine Dash for ACT!
- Activate TopLine Dash with serial number
- Obtain Updates
- Launch TopLine Dash from within ACT!

System Requirements	Obtaining Installation Program	Running Installation	Activation	Obtaining Updates	Launching TopLine Dash
System Requirements	Obtaining Installation Program	Running Installation	Activation	Obtaining Updates	Launching TopLine Dash

See also

Welcome
Dashboard Elements
Dashboard Panels
Advanced Functions
Tutorials
Dashboard Editions
FAQ

System Requirements

TopLine Dash is designed to take advantage of the specific features in each version of ACT! Please choose the correct installation package for your ACT! version.
After the software has been installed, you will see additional menu items in ACT!.

The latest version of Topline Dash v7.1 requires ACT! 2009. It also supports ACT! 2008 version 10.0.2 or higher.
http://www.toplineresults.com/products/downloads/toplinedash7.htm

TopLine Dash v6.4 is for ACT! 2008 version 10.0 and 10.0.1. Development has been discontinued on this version.
http://www.toplineresults.com/products/downloads/toplinedash6-2008.htm

TopLine Dash v6.3 is for ACT! 2007. Development has been discontinued on this version.
http://www.toplineresults.com/products/downloads/toplinedash6-2007.htm

TopLine Dash v4.3 is for ACT! 2006. Development has been discontinued on this version.
http://www.toplineresults.com/products/downloads/toplinedash4.htm

TopLine Dash v3.1 is for ACT! 2005. Development has been discontinued on this version.
http://www.toplineresults.com/products/downloads/toplinedash3.htm

See also

Obtaining Installation Program
Running Installation
Activation
Obtaining Updates
Launching TopLine Dash

Home > Installation > Obtaining Installation Program

Obtaining Installation Program

If you have a previous version of TopLine Dash 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 Dash for the version of ACT! currently installed. When prompted, select Run to install TopLine Dash.

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

See also

System Requirements
Running Installation
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Obtaining Updates
Launching TopLine Dash

Home > Installation > Running Installation

Running Installation

Close ACT! before installing TopLine Dash.

1. Double click on the installer MSI (usually named TopLineDashX.X.X.X.msi, where X.X.X.X indicates the current version) to start the Windows Installer.
2. On the TopLine Dash 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 Dash is a plugin to ACT! and will only be visible inside the ACT! program user interface.

See also

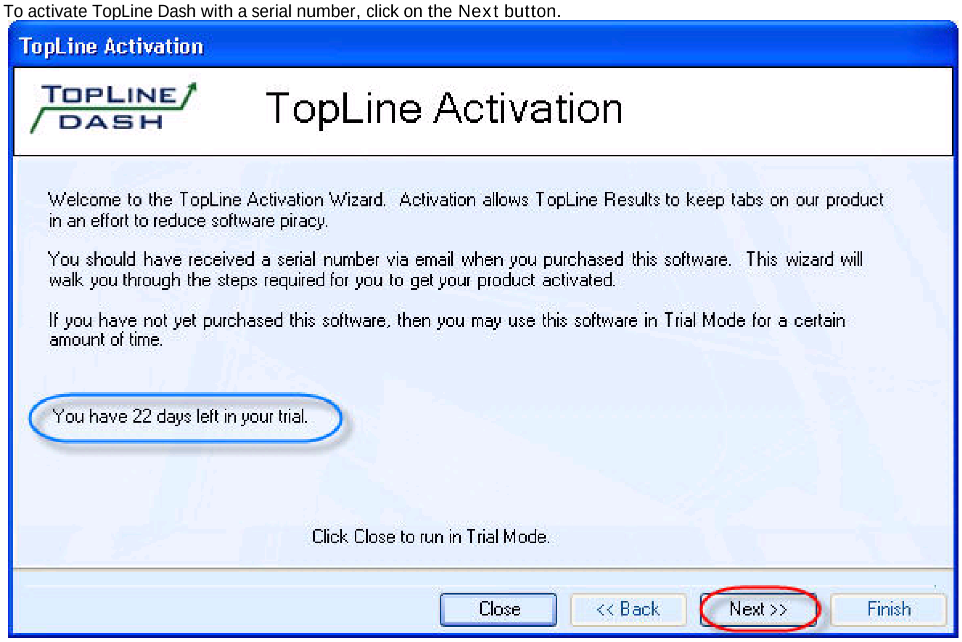
System Requirements
Obtaining Installation Program
Activation
Obtaining Updates
Launching TopLine Dash

Home > Installation > Activation

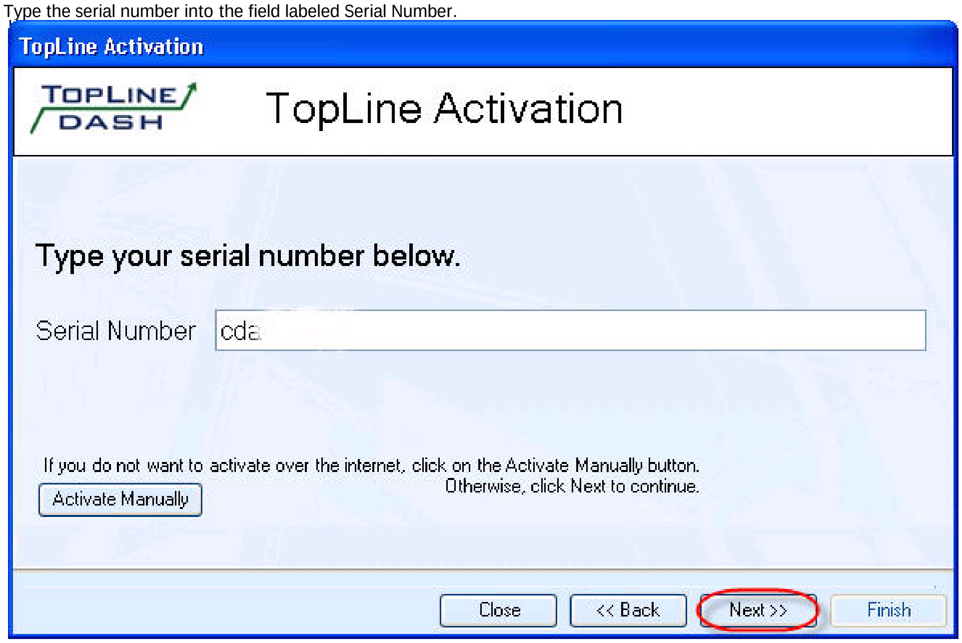
Activation

Upon logging into an ACT! database after installing TopLine Dash, the TopLine Dash icon will appear on the toolbar. TopLine Dash is available in a fully functional 30 day trial Manager mode, starting from the day of installation. The Activation window will display how many day are remaining in the trial. Upon expiration of the trial, all TopLine Dash will remain in the My Documents folder but will not display any data.

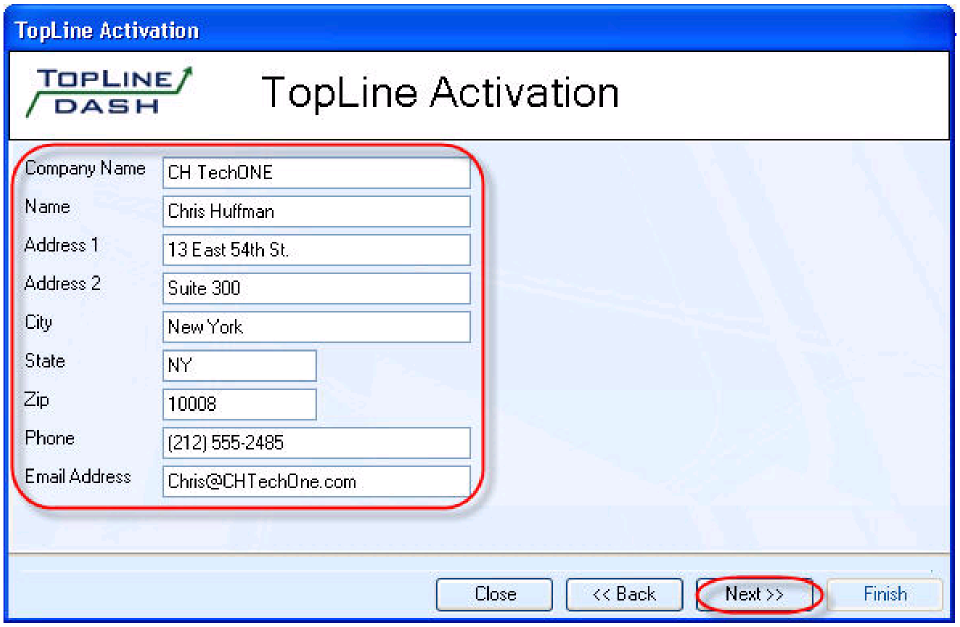
1. To activate TopLine Dash with a serial number, click on the Next button.



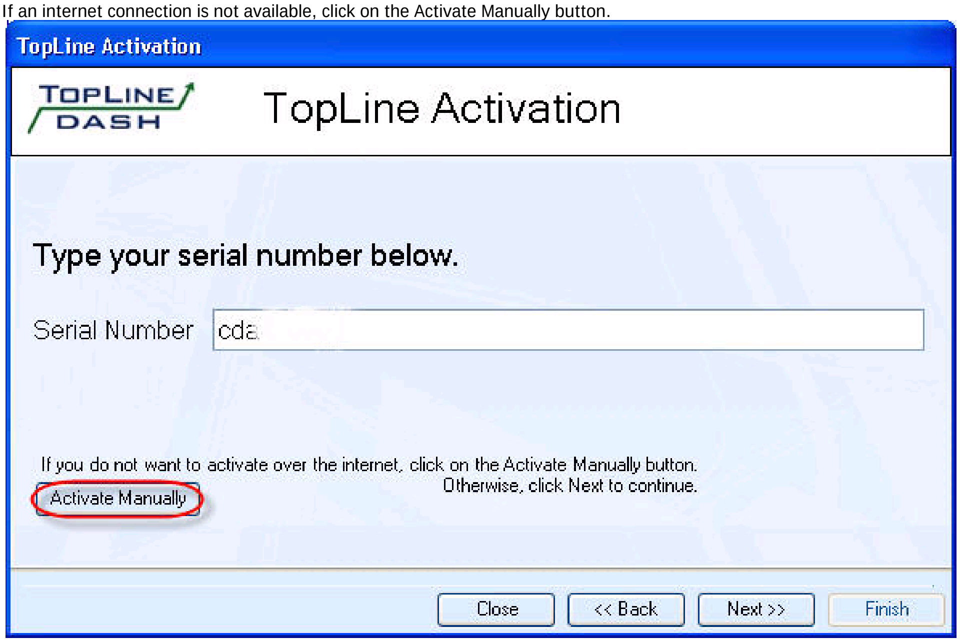
2. Type the serial number into the field labeled Serial Number.



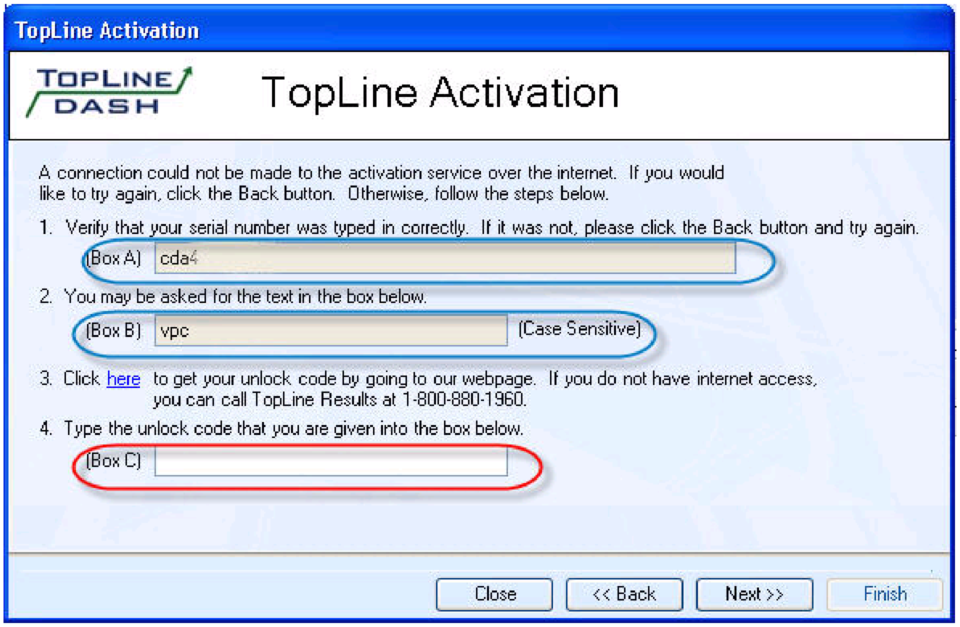
3. If an internet connection is available, click Next to attempt to activate with our servers. If a connection is successful, fill in the Registration boxes. Confirm this information and click Next. (Proceed to step 8)



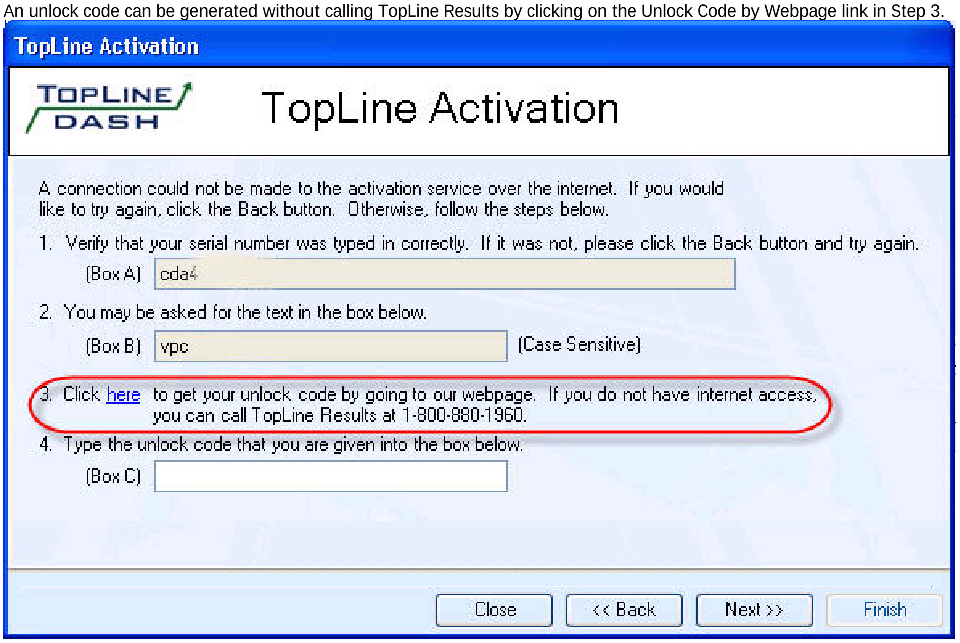
4. If an internet connection is not available, click on the Activate Manually button.



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.

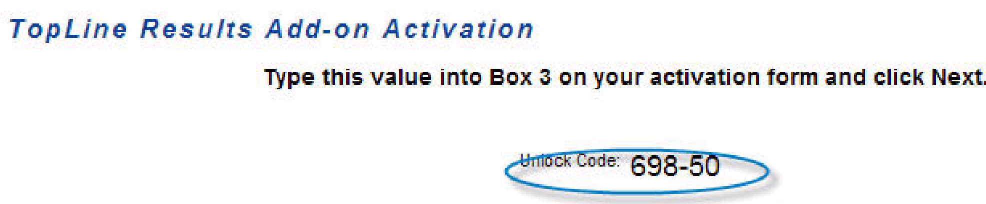


6. An unlock code can be generated without calling TopLine Results by clicking on the Unlock Code by Webpage link in Step 3.

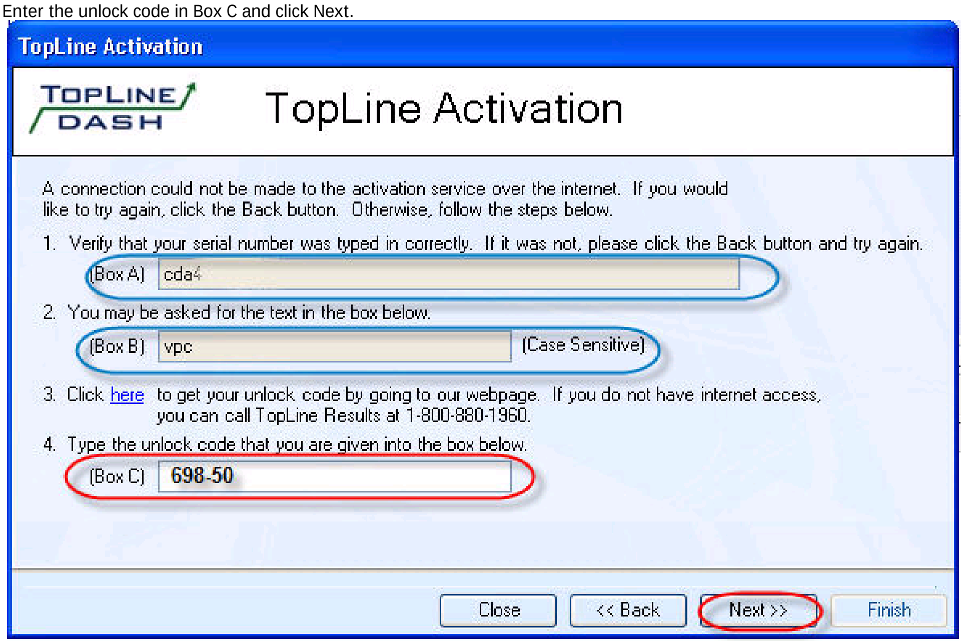


7. A browser window will be opened. Enter the registration information into the boxes and click the Get Unlock Code button.

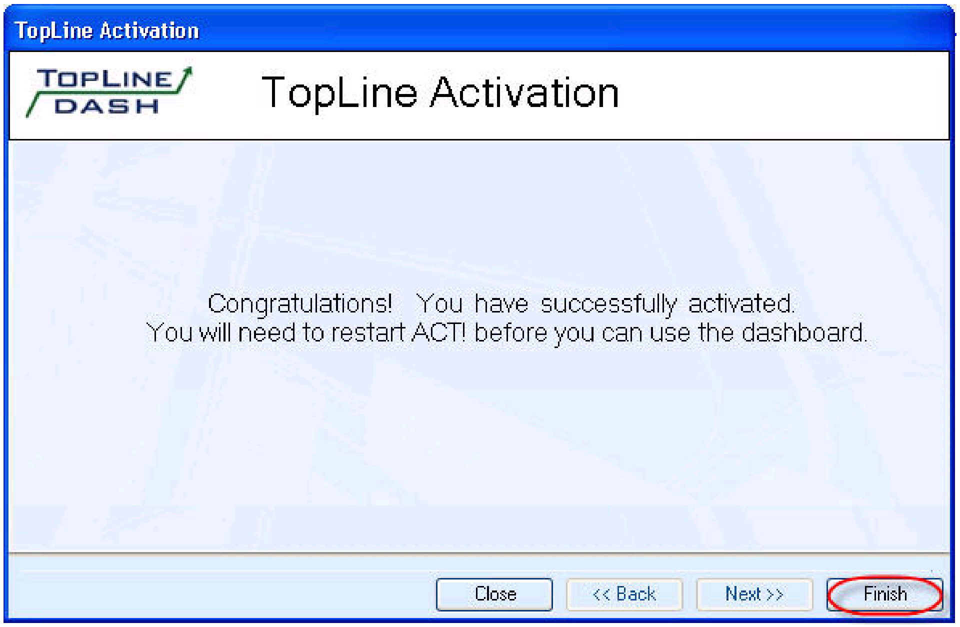
The unlock code will appear on the next page.



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



9. Click Finish to complete the activation process and start TopLine Dash.



See also

System Requirements
Obtaining Installation Program
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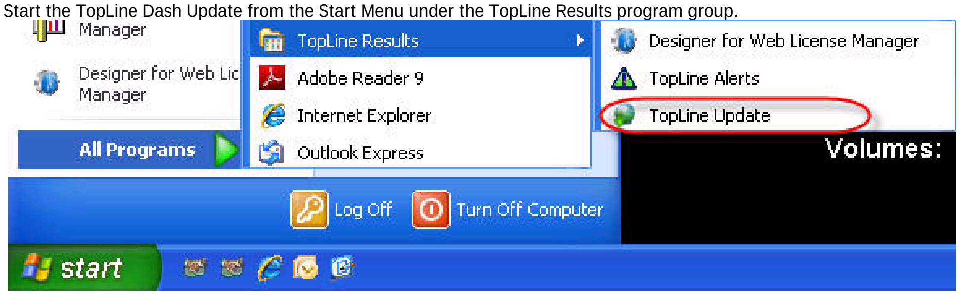
Home > Installation > Obtaining Updates

Obtaining Updates

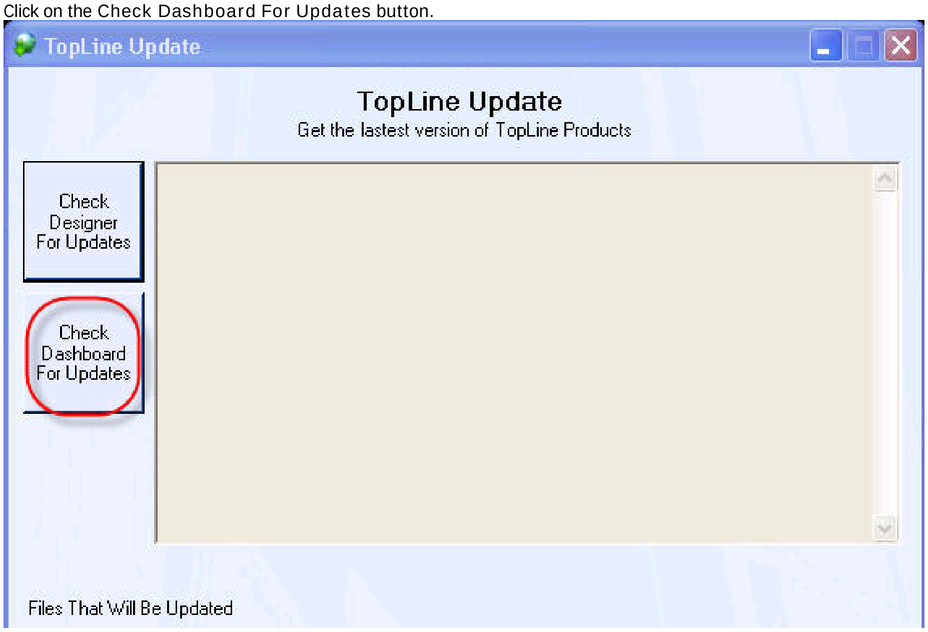
Updates are provided on the TopLine Results website: http://www.toplineresults.com/products/downloads.htm

TopLine Dash installs an Update Checker in the Program Groups.

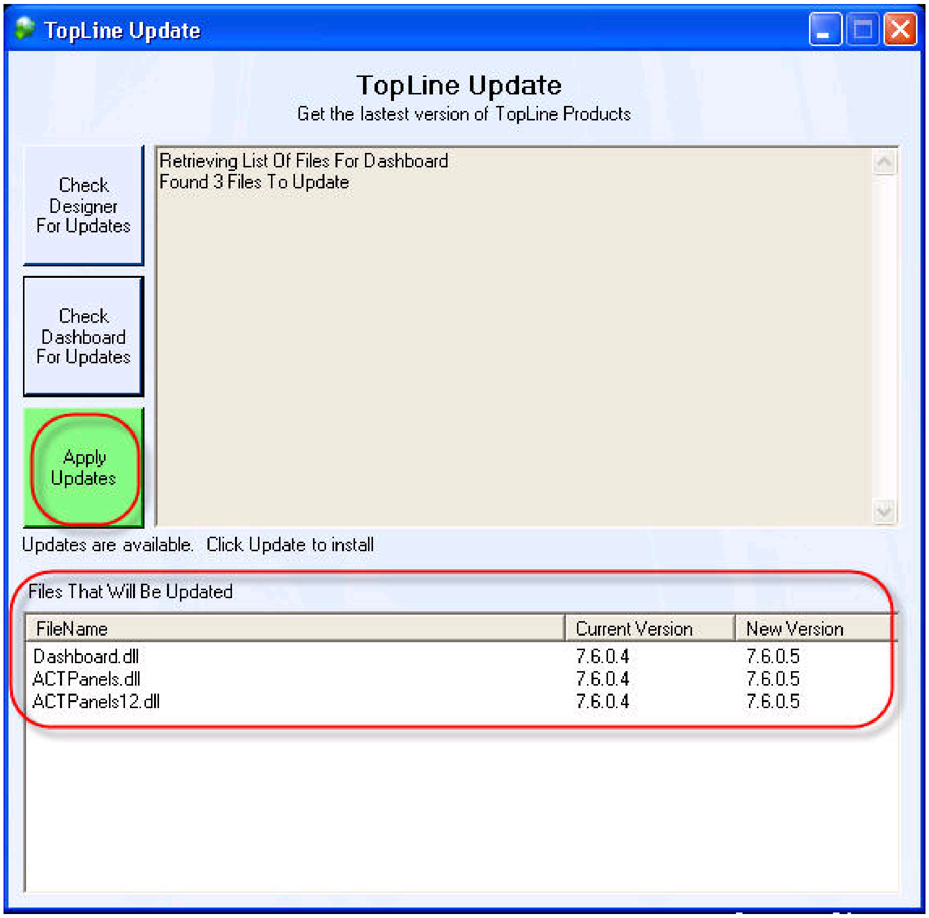
1. Start the TopLine Dash Update from the Start Menu under the TopLine Results program group.



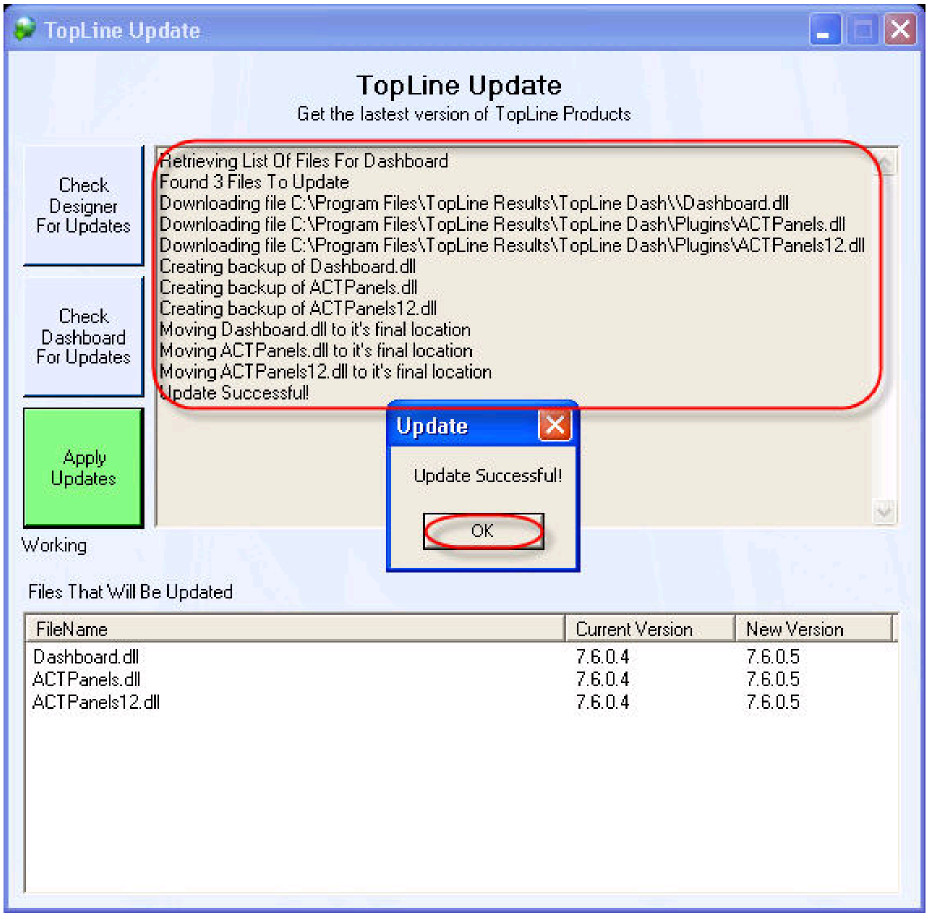
2. Status bars will show the Update program connecting to the TopLine server.
3. Click on the Check Dashboard For Updates button.



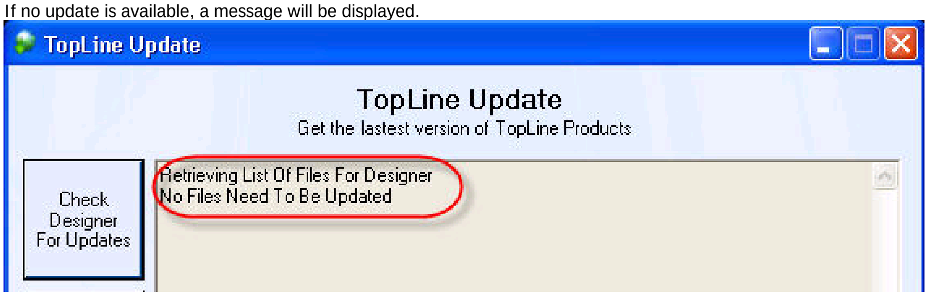
4. If an update is available that updated file will be displayed. With ACT! closed, click on the Update button.



5. The bottom windows displays a log file of the update process. Click OK to complete.



6. If no update is available, a message will be displayed.



See also

System Requirements
Obtaining Installation Program
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Home > Installation > Launching TopLine Dash

Launching TopLine Dash

When TopLine Dash is properly installed, two TopLine Dash icons will appear: One in the Toolbar and a second in the Navbar. Click on the TopLine Dash icon to start the TopLine Dash plugin. Upon the first run, the Getting Started Wizard window will appear. Check the Do Not Show Again box to suppress this window. Click OK to continue.

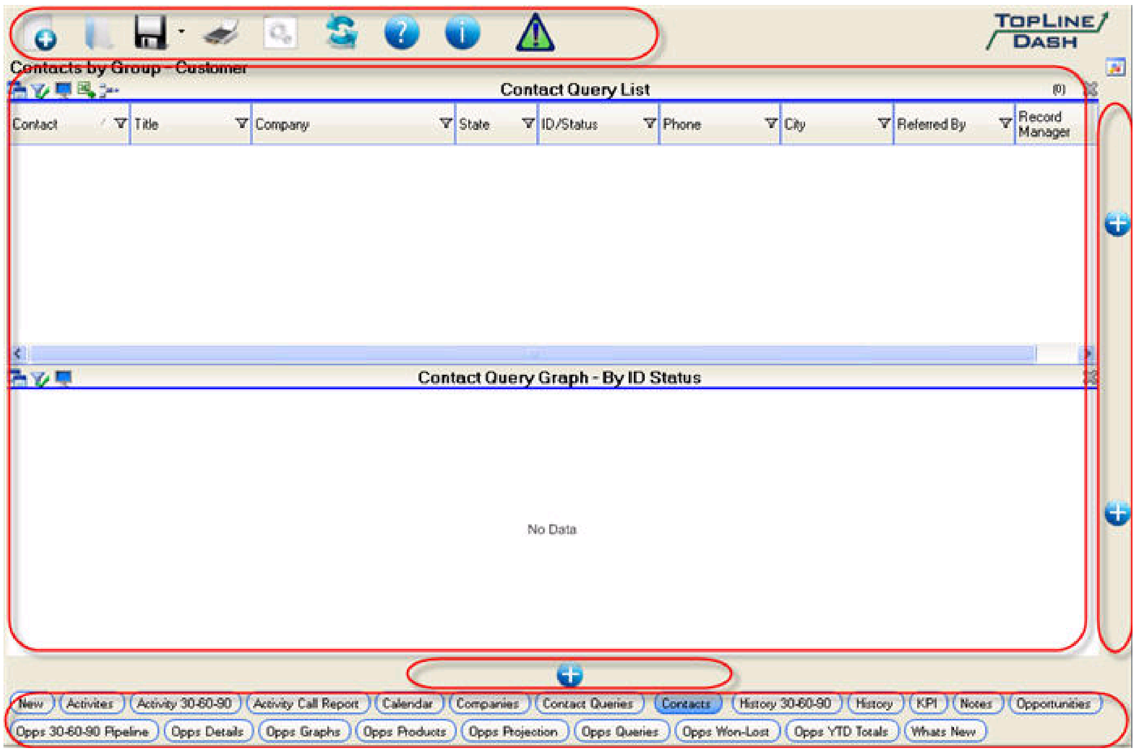
See also

System Requirements
Obtaining Installation Program
Running Installation
Activation
Obtaining Updates

Home > Dashboard Elements

The TopLine Dash Screen contains 4 sections:

1. Dashboard Toobar
2. Panels with Panel Toolbar
3. Row and Column buttons
4. Dashboard Tabs



Articles in this section

Change Dashboard Title
Dashboard Tabs
Dashboard Toolbar
Panel Toolbar
Rows and Columns
Deleting Panels

See also

Welcome
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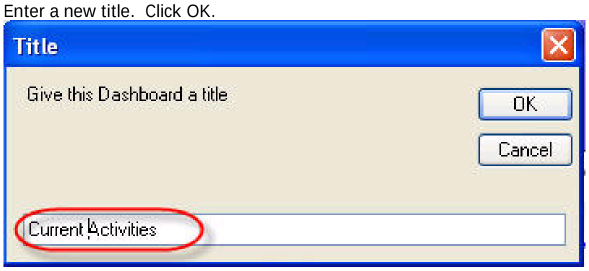
Home > Dashboard Elements > Change Dashboard Title

Change Dashboard Title

The TopLine Dash dashboard title is displayed in the upper left corner of the TopLine Dash screen. This dashboard title is independent of the TopLine Dash filename, shown in the Dashboard Tabs below. To change the TopLine Dash Title:

1. Double-click on the TopLine Dash Title.

2. Enter a new title. Click OK.



3. TopLine Dash Title is now changed.

See also

Dashboard Tabs
Dashboard Toolbar
Panel Toolbar
Rows and Columns
Deleting Panels

Home > Dashboard Elements > Dashboard Tabs

Dashboard Tabs

The bottom of the TopLine Dash screen displays all the TopLine Dash files found in the current dashboard location. TopLine Dash will allocate as much space as necessary to display all the files. The name of the tab reflects the actual file name of the TopLine Dash dashboard.

See also

Change Dashboard Title
Dashboard Toolbar
Panel Toolbar
Rows and Columns
Deleting Panels

Home > Dashboard Elements > Dashboard Toolbar

Dashboard Toolbar

The TopLine Dash toolbar controls function and configuration of the TopLine Dash add-on.

See also

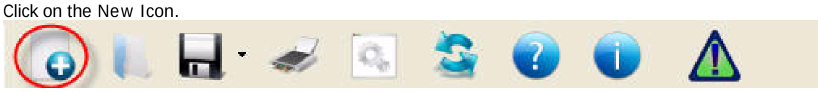
Change Dashboard Title
Dashboard Tabs
Panel Toolbar
Rows and Columns
Deleting Panels

Home > Dashboard Elements > Dashboard Toolbar > New Icon

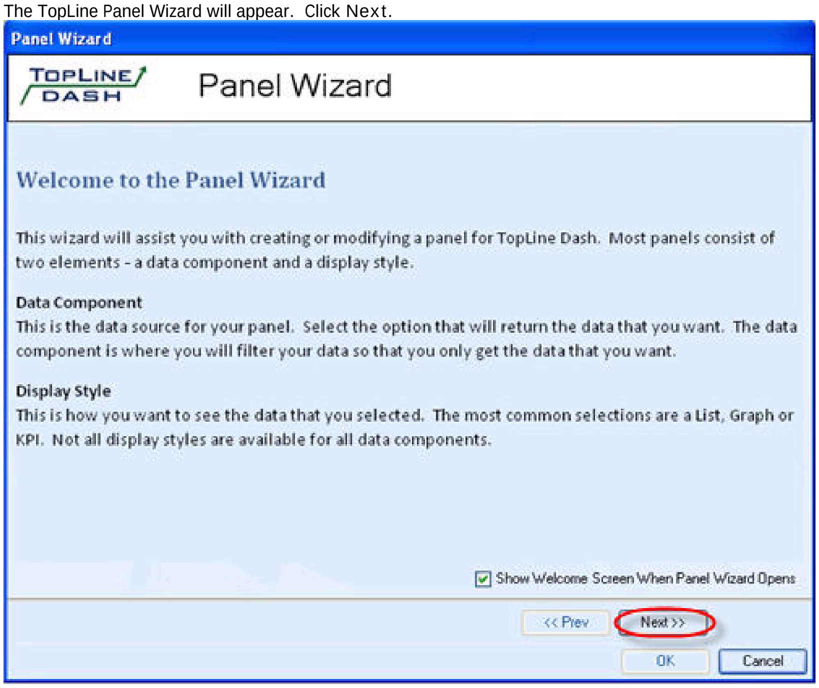
New Icon

To create a new blank TopLine Dash dashboard, use the New Icon from the Dash toolbar.

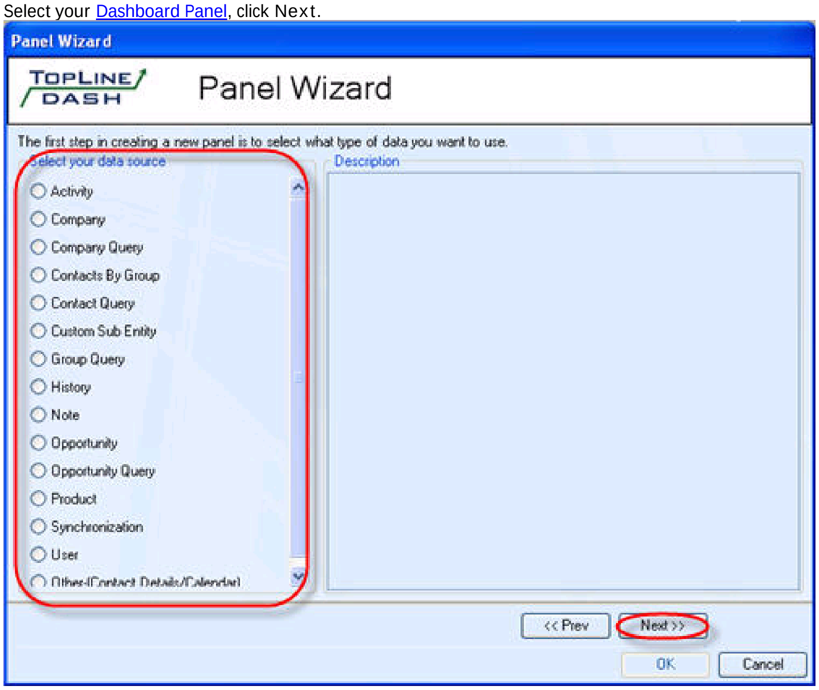
1. Click on the New Icon.



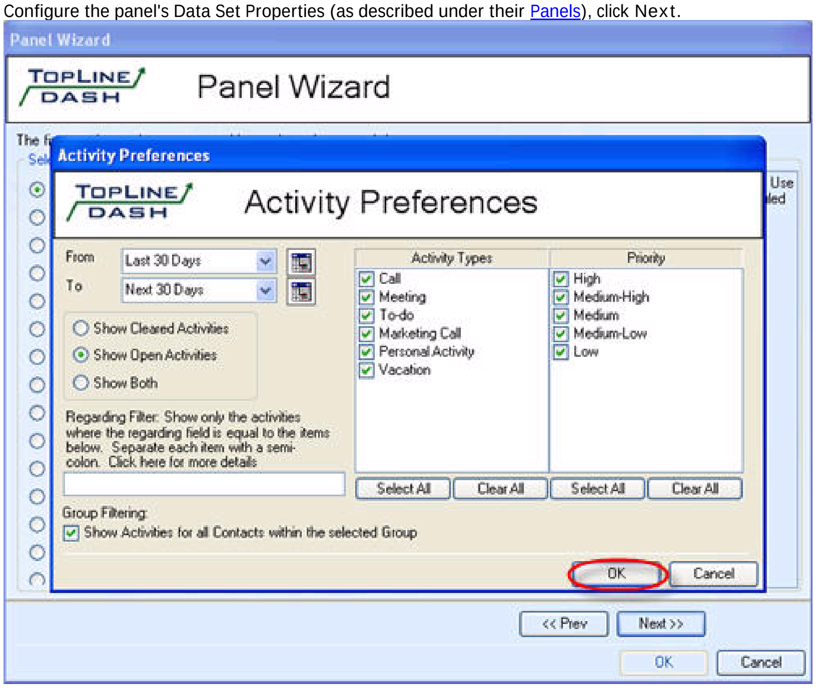
2. The TopLine Panel Wizard will appear. Click Next.



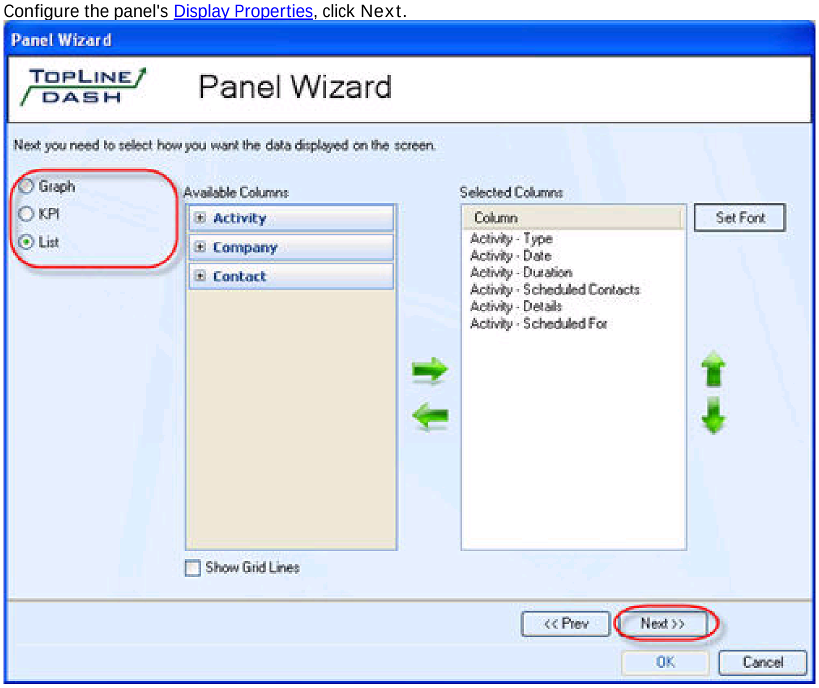
3. Select your Dashboard Panel, click Next.



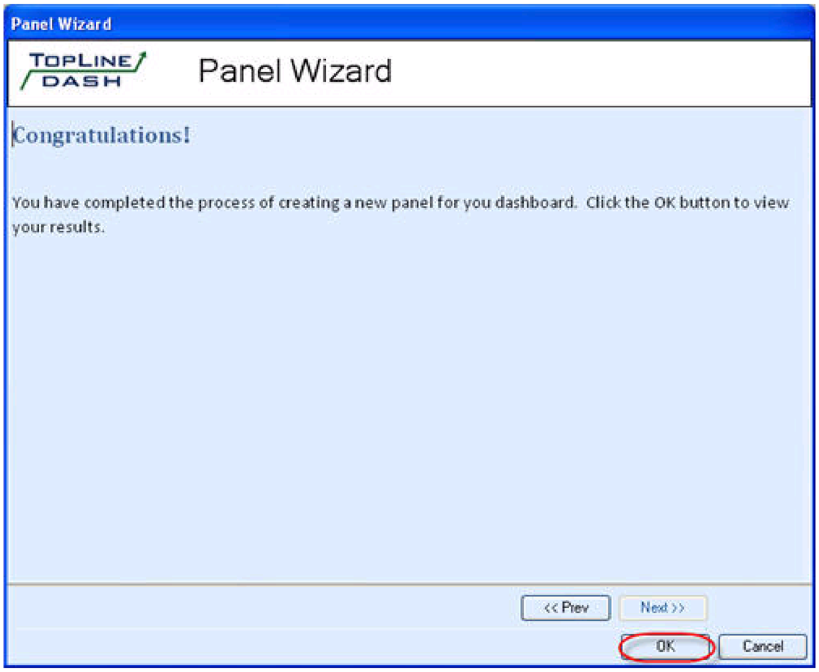
4. Configure the panel's Data Set Properties (as described under their Panels), click Next.



5. Configure the panel's Display Properties, click Next.



6. Click OK for finish the Panel Wizard.



NOTE: Remember to SAVE dashboard or all work will be lost.

See also

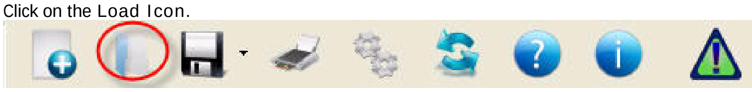
Load Icon
Save Icon
Print Icon
Preferences Icon
Refresh Icon
Help Icon
About Icon
Alerts Icon

Home > Dashboard Elements > Dashboard Toolbar > Load Icon

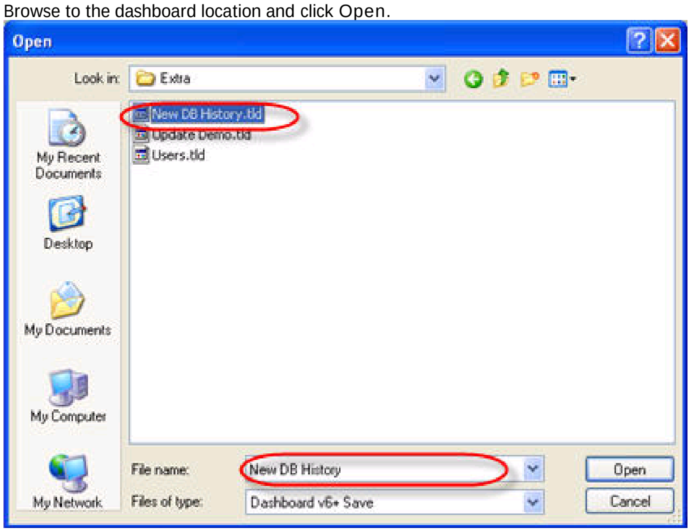
Load Icon

TopLine Dash dashboards stored outside the Dashboard Saves folder can be loaded with the Load Icon from the Dash toolbar.

1. Click on the Load Icon.



2. Browse to the dashboard location and click Open.



3. The dashboard file is loaded.

See also

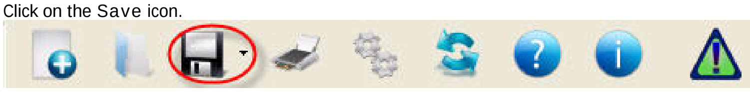
New Icon
Save Icon
Print Icon
Preferences Icon
Refresh Icon
Help Icon
About Icon
Alerts Icon

Home > Dashboard Elements > Dashboard Toolbar > Save Icon

Save Icon

The Save Icon will save all the changes to the dashboard file. NOTE: Changes will be discarded if dashboards are changed without using the Save Icon.

1. Click on the Save icon.

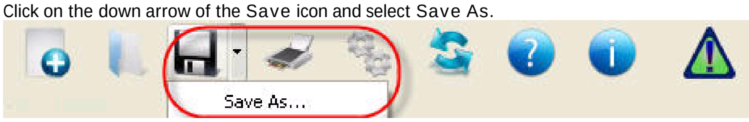


2. The dashboard file is saved.

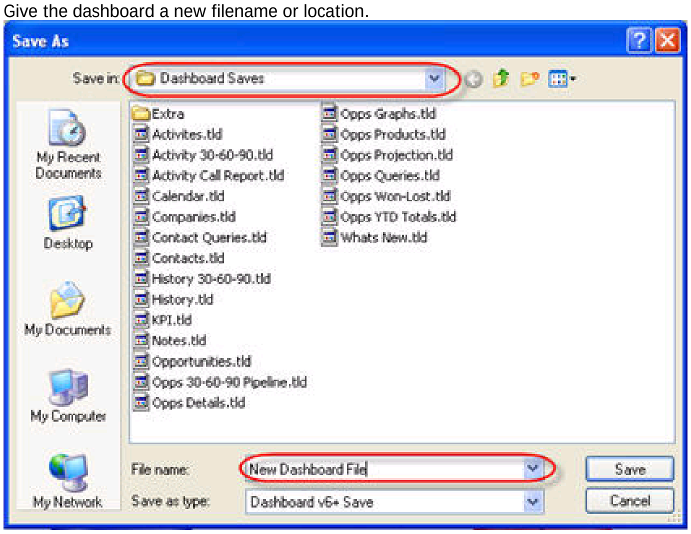
Save As

The Save Icon also contains the Save As function by saving the dashboard file to a completely different filename. Saving a dashboard for the first time or a dashboard which has not be modified will result in a Save As.

1. Click on the down arrow of the Save icon and select Save As.



2. Give the dashboard a new filename or location.



3. The dashboard file is saved.

See also

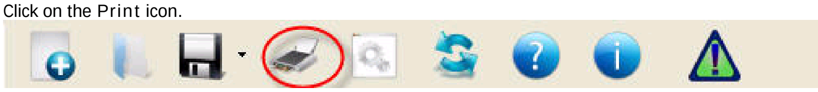
New Icon
Load Icon
Print Icon
Preferences Icon
Refresh Icon
Help Icon
About Icon
Alerts Icon

Home > Dashboard Elements > Dashboard Toolbar > Print Icon

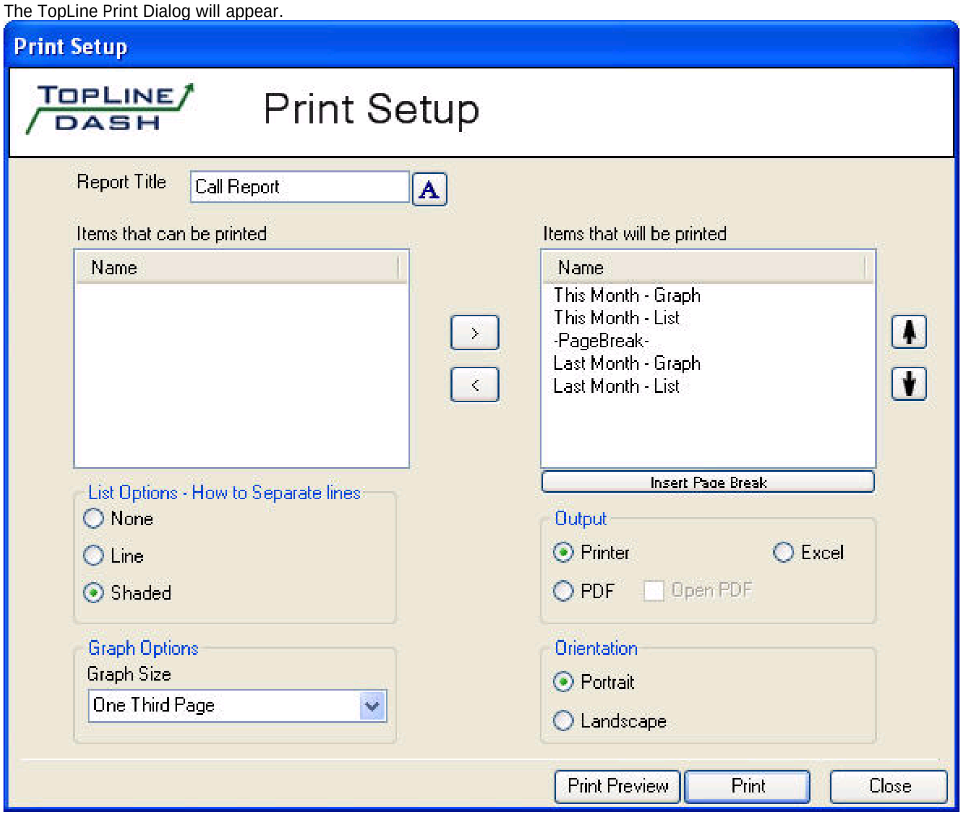
Print Icon

This Print Icon prints the TopLine Dash to the printer, a PDF file, or an Excel spreadsheet.

1. Click on the Print icon.



2. The TopLine Print Dialog will appear.

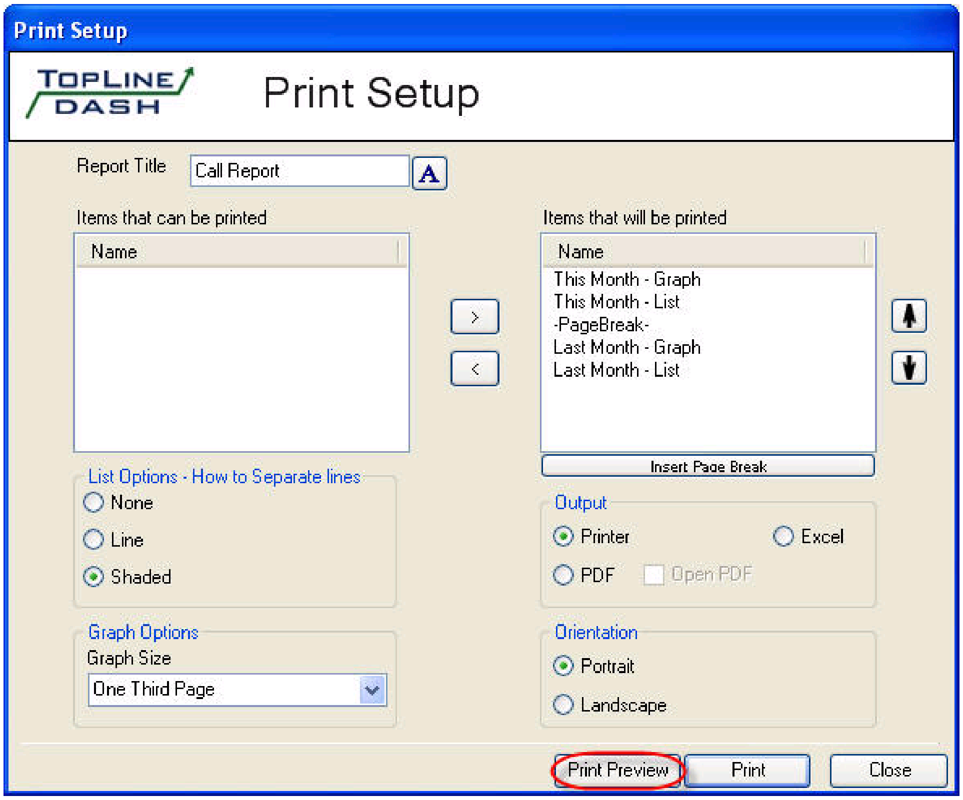


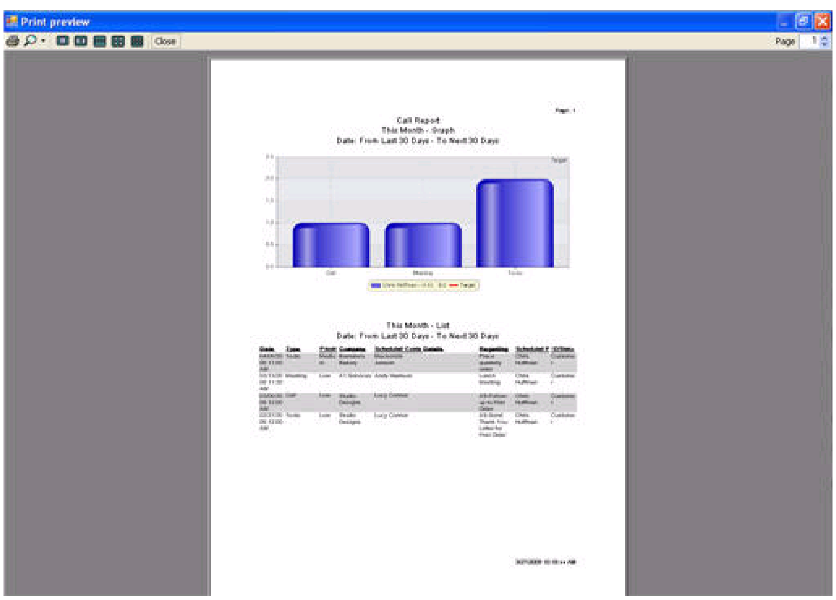
   1. Give the dashboard report a title.
   2. Select which panels will appear on the report by using the -> and <- arrows. Select the order in which the panels will appear by using the up and down arrows
   3. Select how rows in List Views are separated: No visible separation; a line between rows; every other row shaded.
   4. Select the amount of space Graph View will take: Full Page; Half Page; Third of Page; Fourth of Page.
   5. Select the Output for the Report: Default Printer; PDF file; Excel Spreadsheet.
   6. Select the Paper Orientation: Portrait or Landscape.

3. Click on Print button to generate the report.

Print Preview

1. Press the Print Preview button to see a preview of the report before it is generated.





See also

New Icon
Load Icon
Save Icon
Preferences Icon
Refresh Icon
Help Icon
About Icon
Alerts Icon

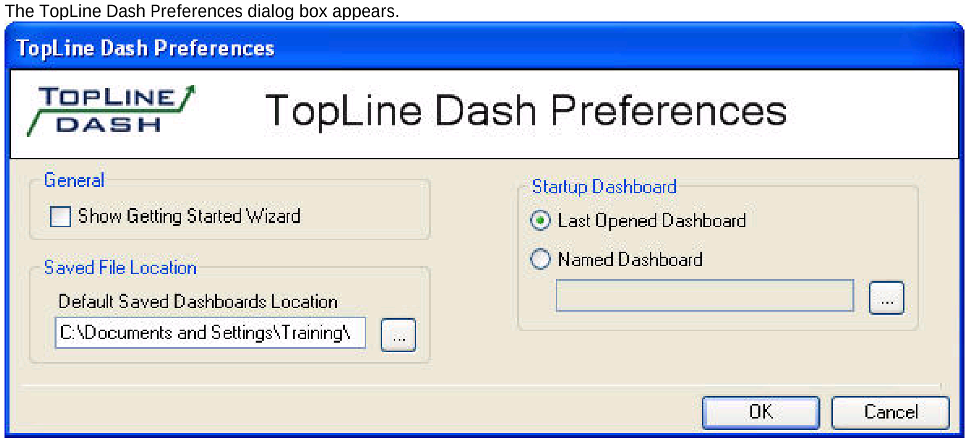
Home > Dashboard Elements > Dashboard Toolbar > Preferences Icon

Preferences Icon

This Preferences Icon configures TopLine Dash global settings.

1. Click on the Preferences icon.

2. The TopLine Dash Preferences dialog box appears.



3. Change the following settings:
    1. General: Uncheck to suppress the Getting Started Wizard.
    2. Saved File Location: Choose the folder to look for TopLine Dash dashboards.
    3. Startup Dashboard: Every time the TopLine Dash icon is pressed, select which dashboard should be displayed.
4. Click OK to commit preferences.

See also

New Icon
Load Icon
Save Icon
Print Icon
Refresh Icon
Help Icon
About Icon
Alerts Icon

Home > Dashboard Elements > Dashboard Toolbar > Refresh Icon

Refresh Icon

The Refresh Icon will reread data from the database for the currently displayed TopLine Dash dashboard.

1. Click on the Refresh icon.

2. The dashboard panels will reread the database data.

See also

New Icon
Load Icon
Save Icon
Print Icon
Preferences Icon
Help Icon
About Icon
Alerts Icon

Home > Dashboard Elements > Dashboard Toolbar > Help Icon

Help Icon

The Help Icon will open a PDF file of this Help File.

See also

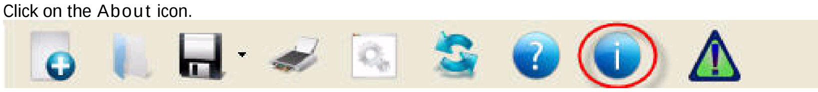
New Icon
Load Icon
Save Icon
Print Icon
Preferences Icon
Refresh Icon
About Icon
Alerts Icon

Home > Dashboard Elements > Dashboard Toolbar > About Icon

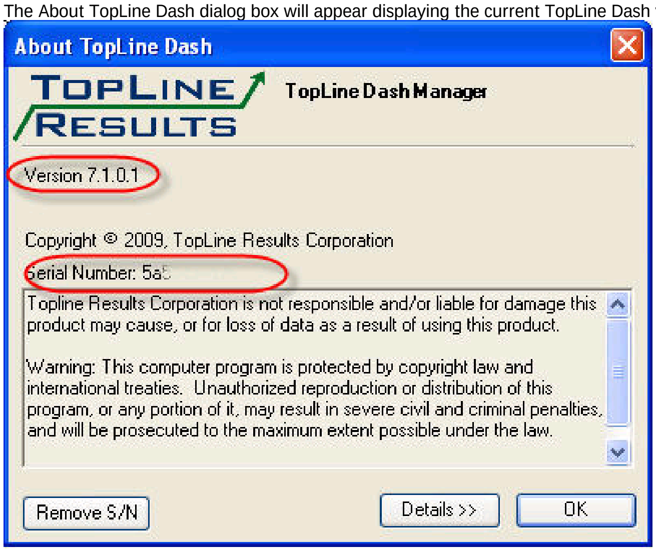
About Icon

The About Icon will display the TopLine Dash version and serial Number.

1. Click on the About icon.



2. The About TopLine Dash dialog box will appear displaying the current TopLine Dash version and registered serial number (if registered.)



NOTE: Press the Remove S/N button to remove the registered serial number or to enter a new one.

See also

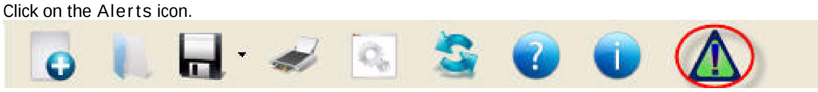
New Icon
Load Icon
Save Icon
Print Icon
Preferences Icon
Refresh Icon
Help Icon
Alerts Icon

Home > Dashboard Elements > Dashboard Toolbar > Alerts Icon

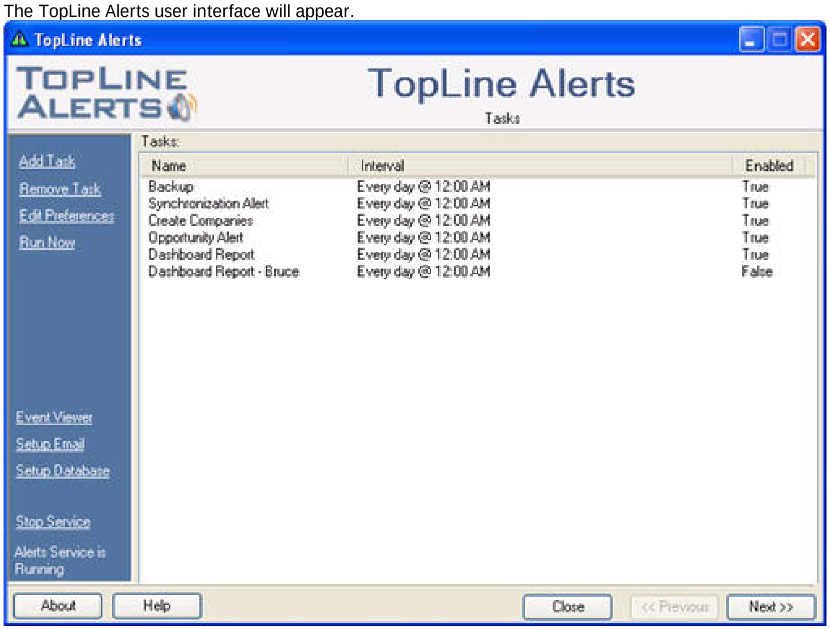
Alerts Icon

The TopLine Alerts Icon will appear if TopLine Alerts is installed on the computer.

1. Click on the Alerts icon.



2. The TopLine Alerts user interface will appear.



See also

New Icon
Load Icon
Save Icon
Print Icon
Preferences Icon
Refresh Icon
Help Icon
About Icon

Home > Dashboard Elements > Panel Toolbar

Panel Toolbar

The TopLine Dash Panel toolbar in the upper left hand corner of each panel controls what is displayed inside the panel.


Panel Title


Panel Wizard Icon


Filter Icon


Display Type Icon


User Icon


Contact Group Icon


Export to Excel Icon


Grouping Icon


List Sorting


List Filtering


List Summaries


Date Range and Record Count

See also

Change Dashboard Title
Dashboard Tabs
Dashboard Toolbar
Rows and Columns
Deleting Panels

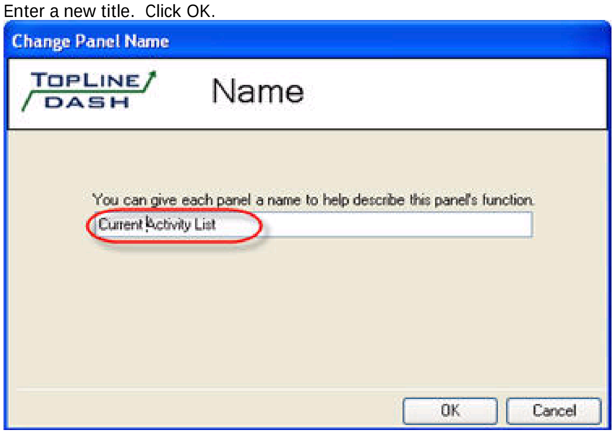
Home > Dashboard Elements > Panel Toolbar > Panel Title

Panel Title

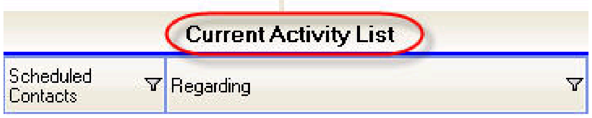
The TopLine Dash panel title is displayed on the top of the TopLine Dash panel. To change the TopLine Dash panel title:

1. Double-click on the TopLine Dash panel title.

2. Enter a new title. Click OK.



3. TopLine Dash Title is now changed.



See also

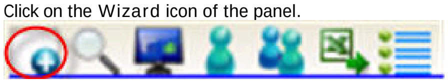
Panel Wizard Icon
Filter Icon
Display Type Icon
User Icon
Contact Group Icon
Export to Excel Icon
Grouping Icon
List Sorting
List Filtering
List Summaries
Date Range and Record Count

Home > Dashboard Elements > Panel Toolbar > Panel Wizard Icon

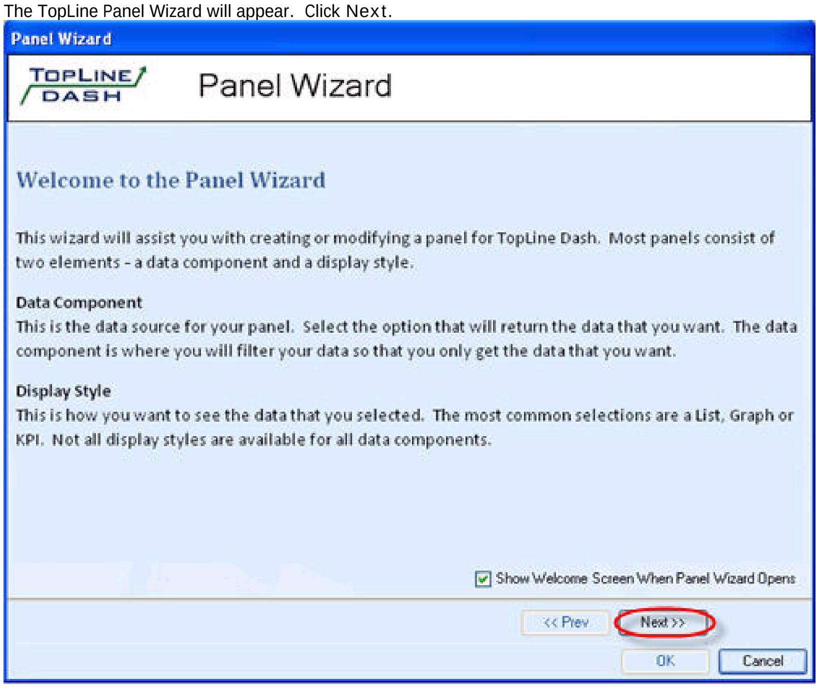
Panel Wizard Icon

The Panel Wizard Icon will launch the same Panel Wizard as the Dashboard New Icon and replace the contents of the current panel.

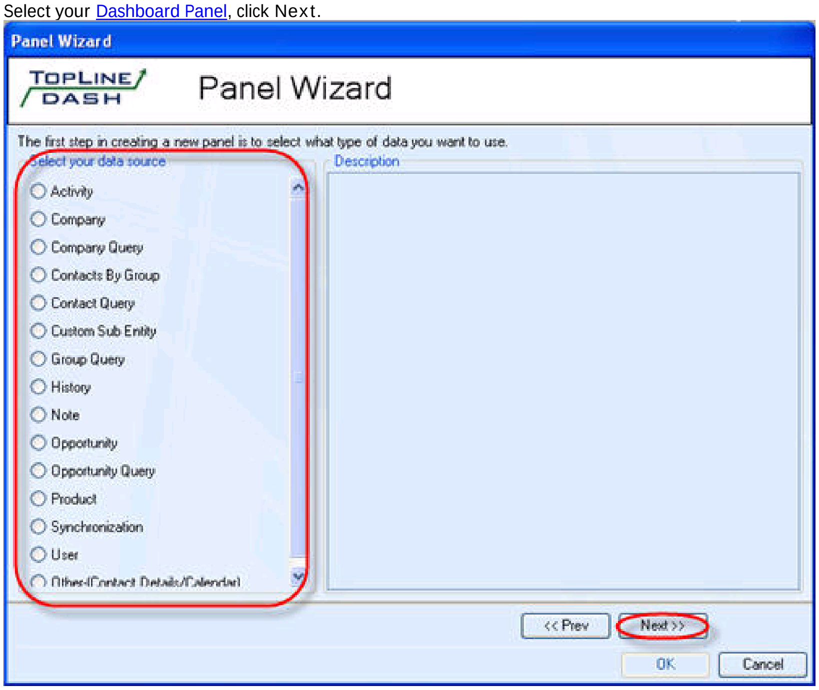
1. Click on the Wizard icon of the panel.



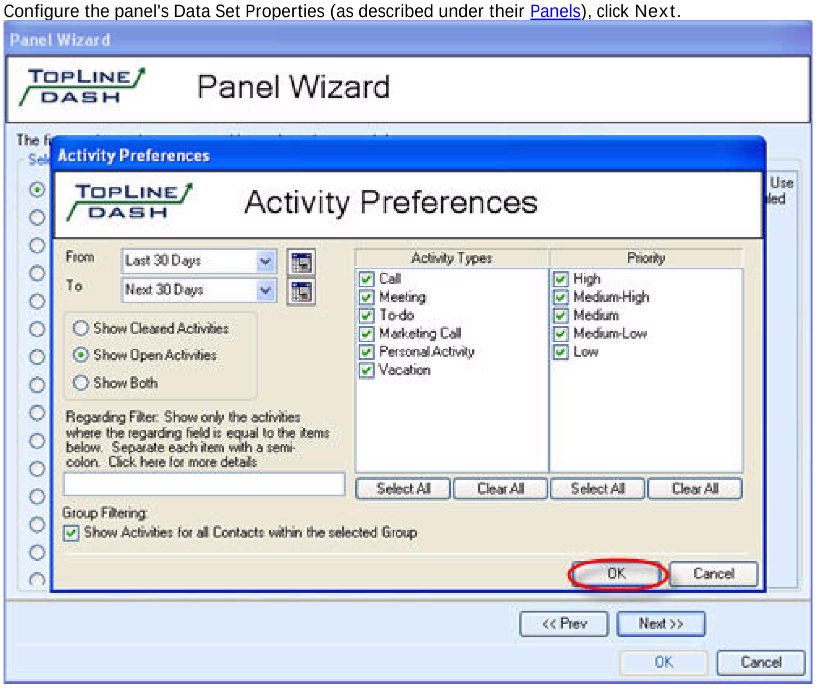
2. The TopLine Panel Wizard will appear. Click Next.



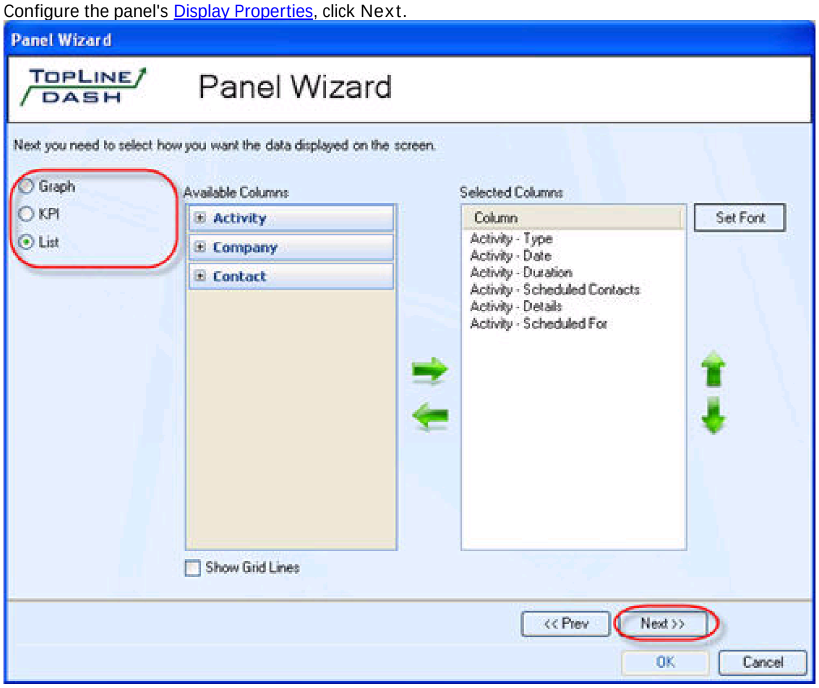
3. Select your Dashboard Panel, click Next.



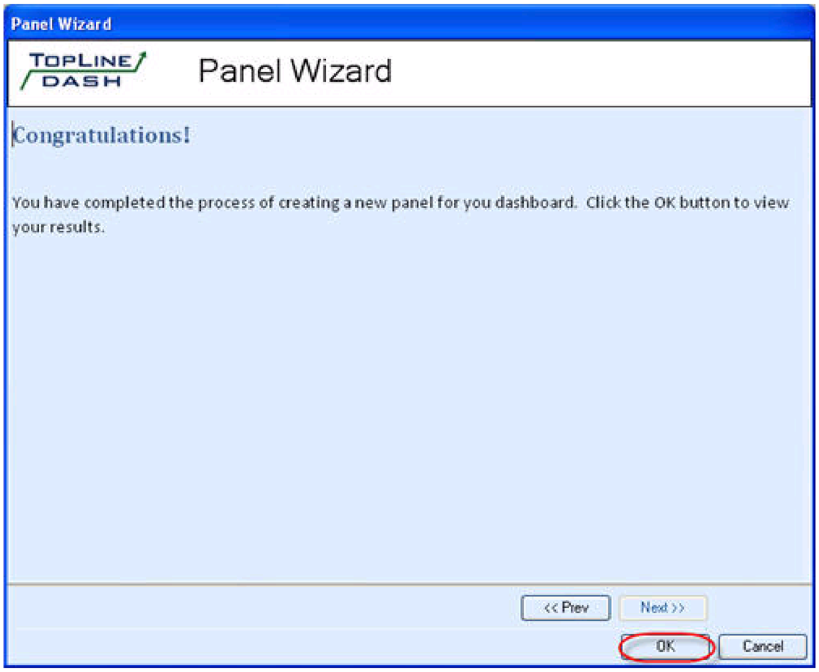
4. Configure the panel's Data Set Properties (as described under their Panels), click Next.



5. Configure the panel's Display Properties, click Next.



6. Click OK to finish the Panel Wizard.



See also

Panel Title
Filter Icon
Display Type Icon
User Icon
Contact Group Icon
Export to Excel Icon
Grouping Icon
List Sorting
List Filtering
List Summaries
Date Range and Record Count

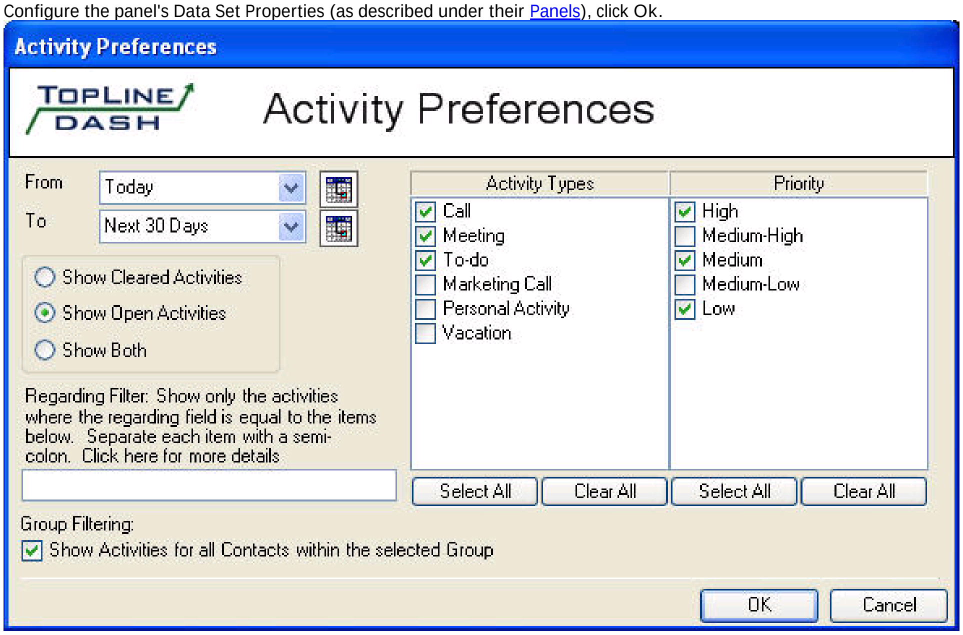
Home > Dashboard Elements > Panel Toolbar > Filter Icon

Filter Icon

The Filter (Data Set Properties) Icon controls what data is displayed in the panels and is unique to each type of Dashboard Panel.

1. Click on the Filter (Data Set Properties) icon.

2. Configure the panel's Data Set Properties (as described under their Panels), click Ok.



3. The panel's data set is changed.

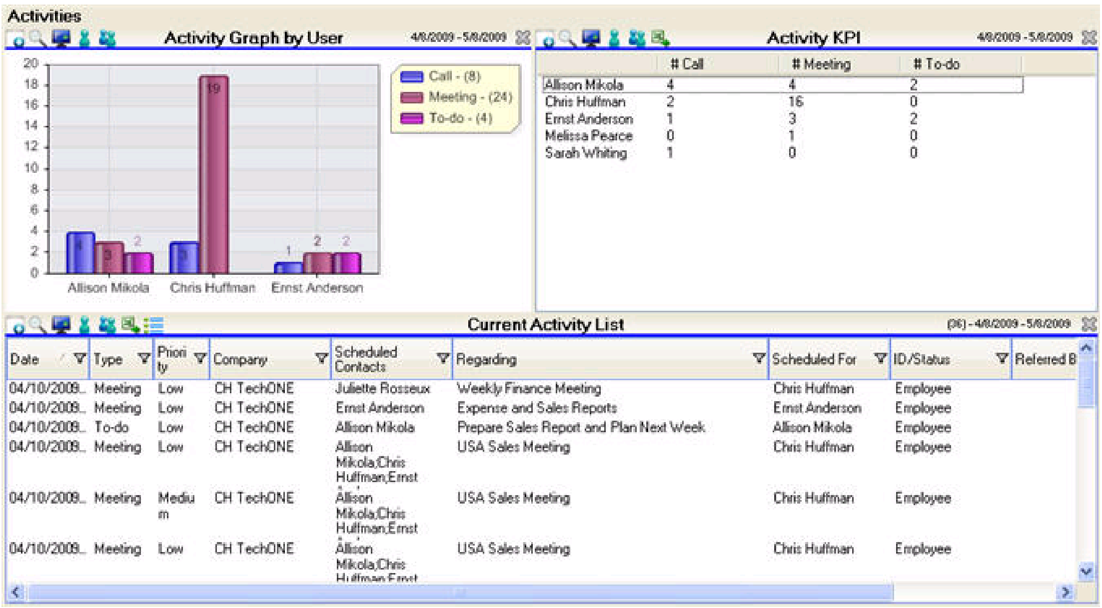
See also

Panel Title
Panel Wizard Icon
Display Type Icon
User Icon
Contact Group Icon
Export to Excel Icon
Grouping Icon
List Sorting
List Filtering
List Summaries
Date Range and Record Count

Home > Dashboard Elements > Panel Toolbar > Display Type Icon

Display Type Icon

The Display Type icon controls how the data is displayed in the panel. There are three (3) different methods for displaying data:




List View


KPI View


Graph View

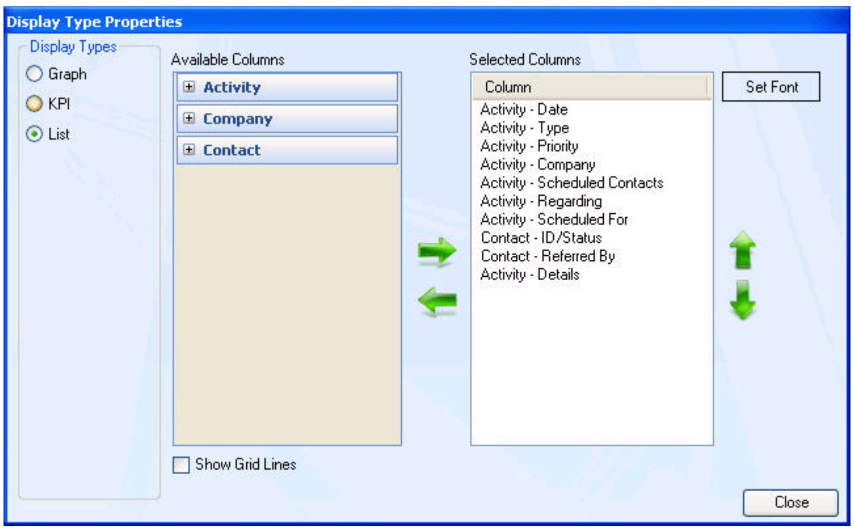
See also

Panel Title
Panel Wizard Icon
Filter Icon
User Icon
Contact Group Icon
Export to Excel Icon
Grouping Icon
List Sorting
List Filtering
List Summaries
Date Range and Record Count

Home > Dashboard Elements > Panel Toolbar > Display Type Icon > List View

List View

The List View displays data in table spreadsheet format over the selected date range.



Use the ' ' symbols to expand the objects to display all available fields.
Use the left and right arrows to add and remove fields from the Selected Display Columns.
Use the up and down arrows to change the order of the Selected Display Columns.
The Show Grid Lines checkbox will display gray grid lines between the columns and rows in the List view.
Click on Set Font button to change the default font of the entire List View. The default font is Microsoft Sans Serif, 8 point.

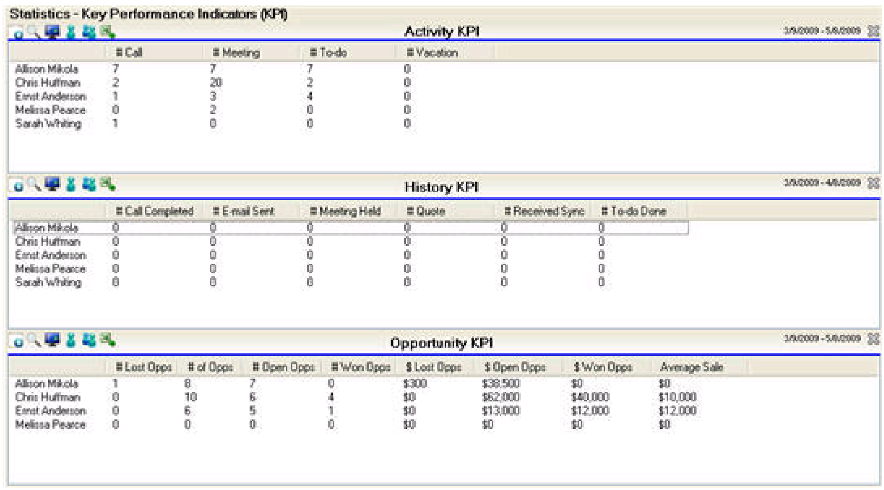
See also

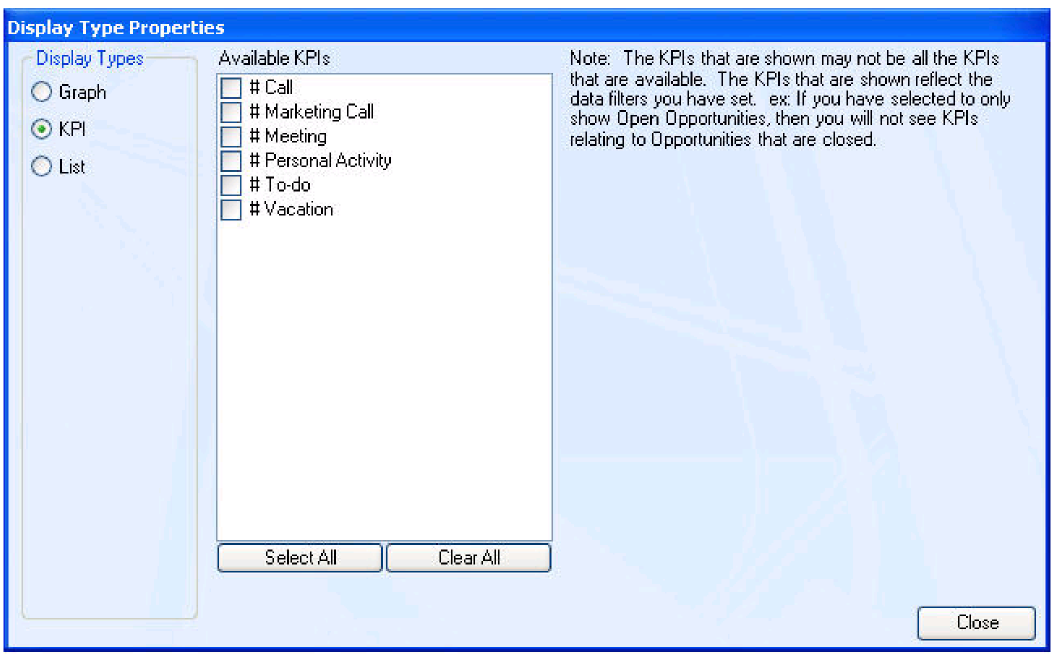
KPI View
Graph View

Home > Dashboard Elements > Panel Toolbar > Display Type Icon > KPI View

KPI View

Key Performance Indicators (or KPI) views are only available on Activity, History, Opportunity and Product Panels and are totals of predefined categories for each user (or Record Manager) over the selected date range.





Activity KPI categories

- Totals of ALL defined Activity Types (i.e. # of Calls, # of Meetings, etc.)

History KPI categories

- Totals of ALL defined History Types (i.e. # of Calls Completed , # of Meetings Held, etc.)

Opportunity & Product KPI categories

- # Lost Opps

- # of Opps
- # of Open Opps
- # of Won Opps
- # of Lost Opps
- Total $ of Open Opps
- Weighted Total $ of Lost Opps
- Weighted Total $ of Open Opps
- Weighted Total $ of Won Opps
- Total $ of Won Opps
- Average Sale
- Winning Ratio

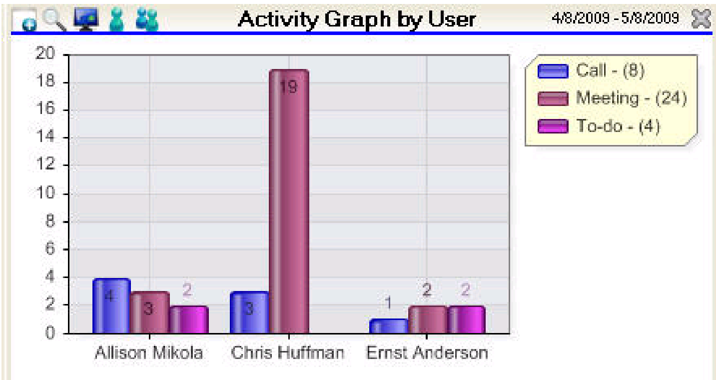
See also

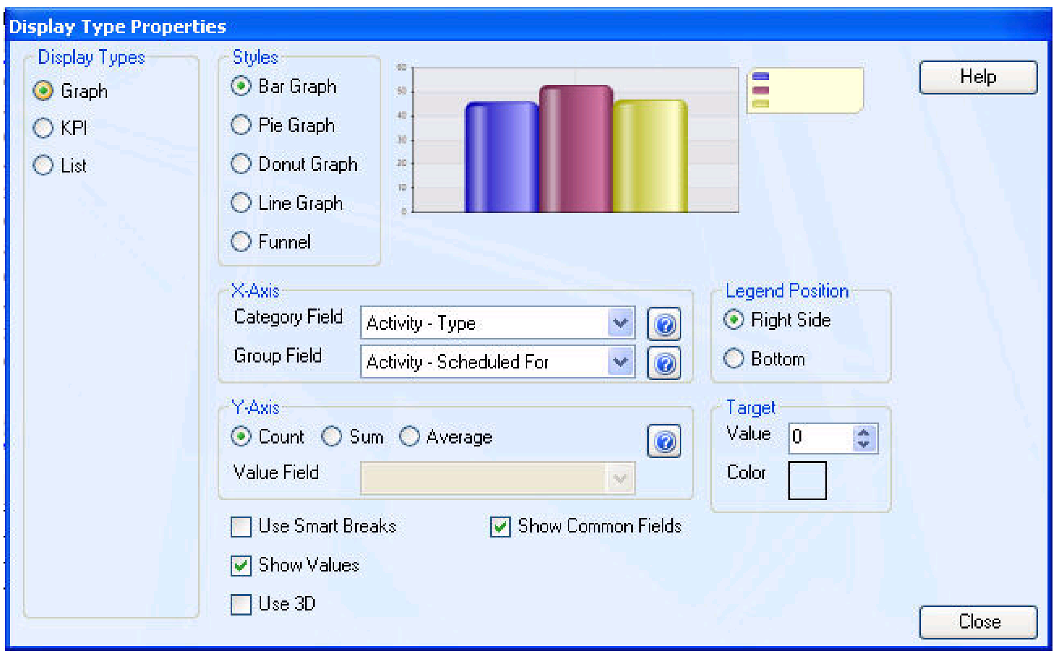
List View
Graph View

Home > Dashboard Elements > Panel Toolbar > Display Type Icon > Graph View

Graph View

The Graph view displays data in graphical format over the selected date range.





Graph Styles

There are 5 graph styles to choose from:

- Bar Graph
- Pie Graph
- Donut Graph
- Line Graph
- Funnel Graph

X-Axis

Determine what should be displayed on the X-Axis (and Legend Box) with the Category Field. All fields in related objects are available. (See Dashboard Panels for list of fields.) Graph more than one item with the Group Field.

Y-Axis

Determine what should be displayed on the Y-Axis. By default, it is a count of records, but it can be changed to a Sum or Average of any.

Legend Position

The Legend can be placed at the bottom or right side of the graph.

Target

A target line can be placed on the graph (for Bar and Line graphs) for any value and be assigned any color

Options

- Smart Breaks can assist in displaying a graph where the range of data is very wide.
- Show Values will display numeric values on the graph.
- Use 3D will attempt to render the graph in 3D.
- Show Common Fields will restrict the fields of related objects to those determined to be common by TopLine.

See also

List View
KPI View

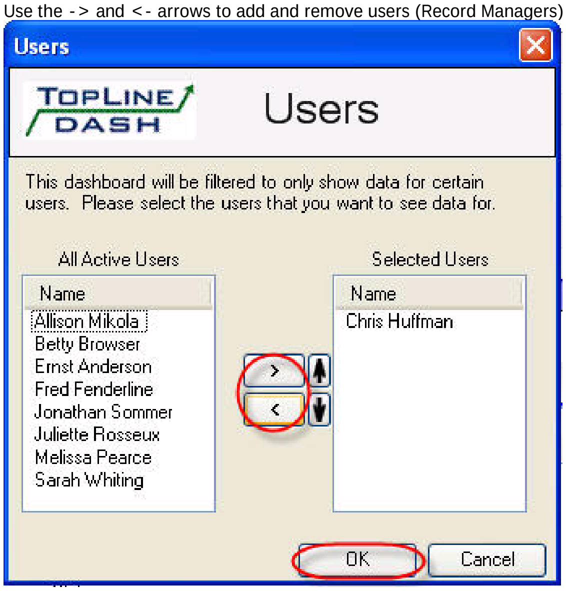
Home > Dashboard Elements > Panel Toolbar > User Icon

User Icon

The User Icon selects the Record Manager's data to be displayed. NOTE: By default, the User Icon is set to only the current user upon panel creation.

1. Click the User icon.

2. Use the -> and <- arrows to add and remove users (Record Managers)



3. Click OK

Only data belonging to the selected Record Managers is now displayed. In this example, only data whereas Chris Huffman is the Record Manager will be displayed.

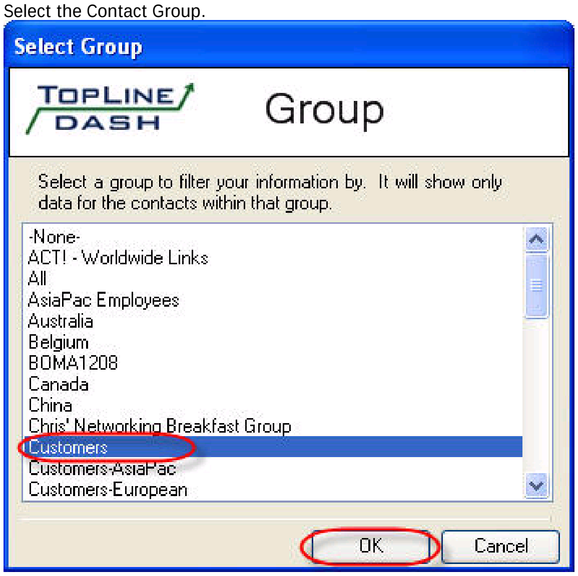
See also

Panel Title
Panel Wizard Icon
Filter Icon
Display Type Icon
Contact Group Icon
Export to Excel Icon
Grouping Icon
List Sorting
List Filtering
List Summaries
Date Range and Record Count

Contact Group Icon

The Contact Group icon filters the data set to that only belonging to the selected group. NOTE: Only one (1) contact group can be selected.

1. Click the Contact Group icon.

2. Select the Contact Group.


3. Click OK.

Only data belonging to contacts of the selected Contact Group Managers is now displayed. In this example, only data for Contacts in the Customer group will be displayed.

See also

Panel Title
Panel Wizard Icon
Filter Icon
Display Type Icon
User Icon
Export to Excel Icon
Grouping Icon
List Sorting
List Filtering
List Summaries
Date Range and Record Count

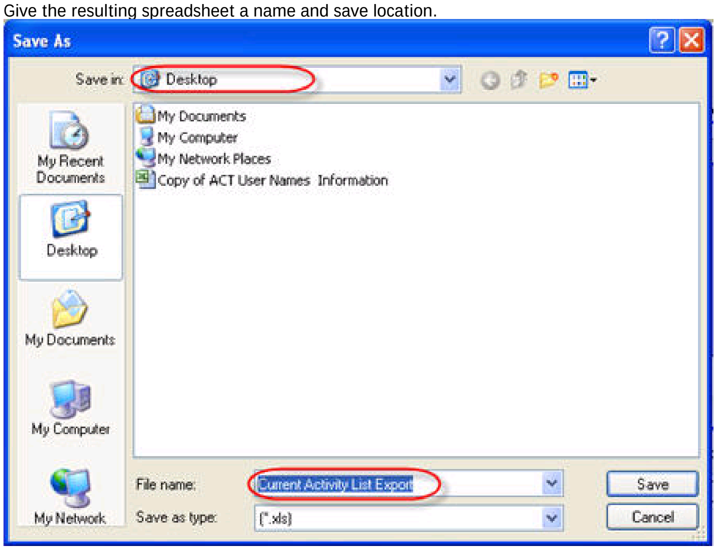
Home > Dashboard Elements > Panel Toolbar > Export to Excel Icon

Export to Excel Icon

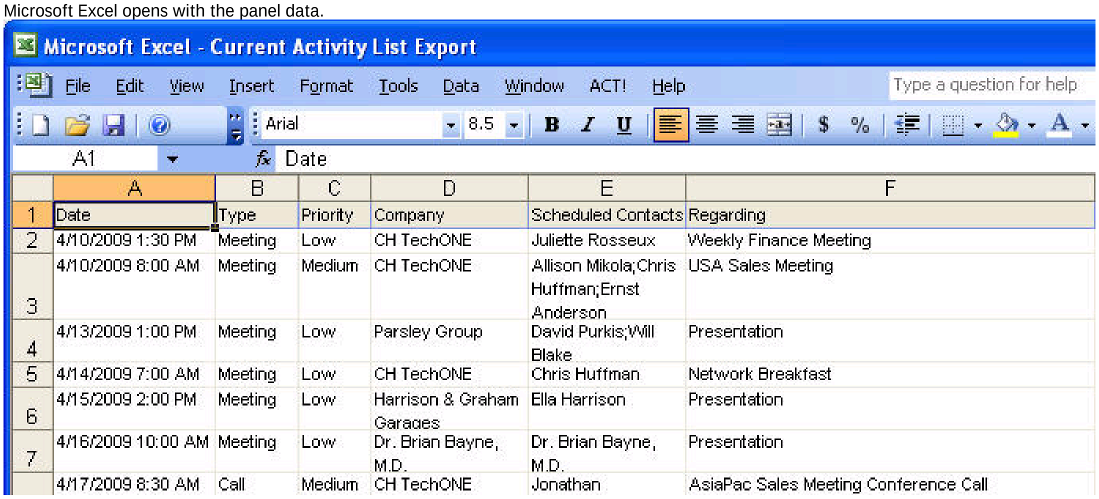
The Export to Excel icon is only available in List Views and KPI Views, and only for users who have the Export to Excel user permission.

1. Click on the Excel icon.

2. Give the resulting spreadsheet a name and save location.



3. Microsoft Excel opens with the panel data.



NOTE: TopLine Dash has the same requirements for the version of Microsoft Office as ACT!

See also

Panel Title
Panel Wizard Icon
Filter Icon
Display Type Icon
User Icon
Contact Group Icon
Grouping Icon
List Sorting
List Filtering
List Summaries
Date Range and Record Count

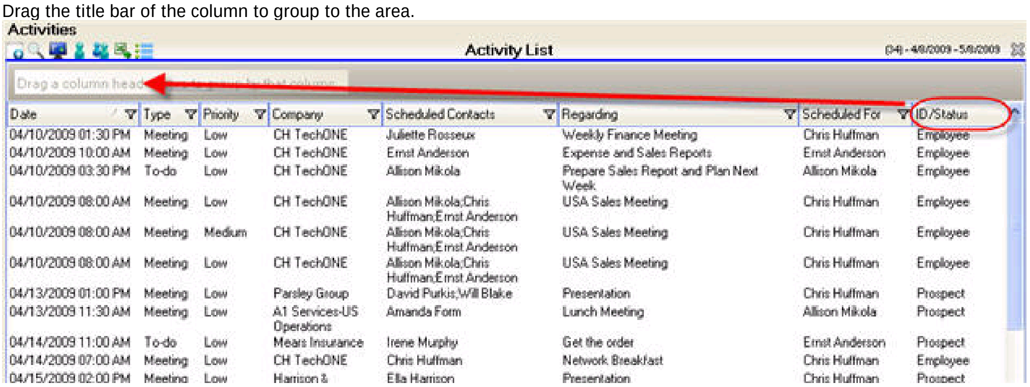
Home > Dashboard Elements > Panel Toolbar > Grouping Icon

Grouping Icon

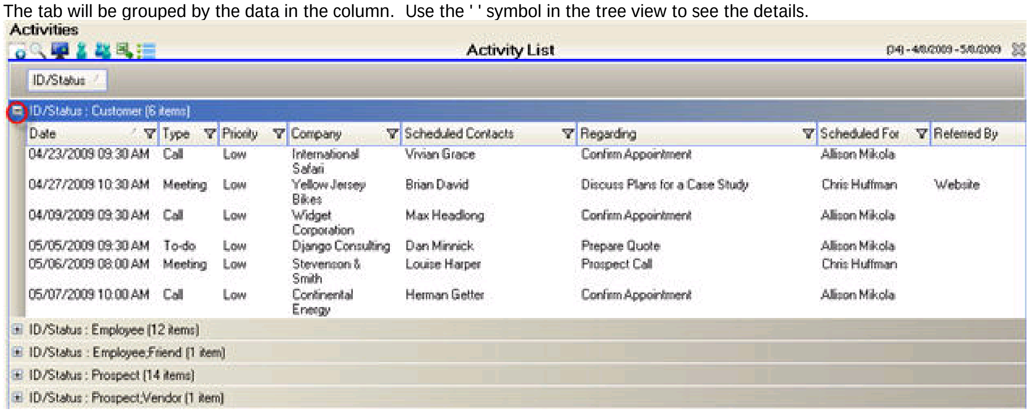
The Grouping icon allows the data set to be grouped by columns. Multiple grouping is possible in TopLine Dash.

1. Click on the Grouping icon to display the Grouping Order area.

2. Drag the title bar of the column to group to the area.



3. The tab will be grouped by the data in the column. Use the ' ' symbol in the tree view to see the details.



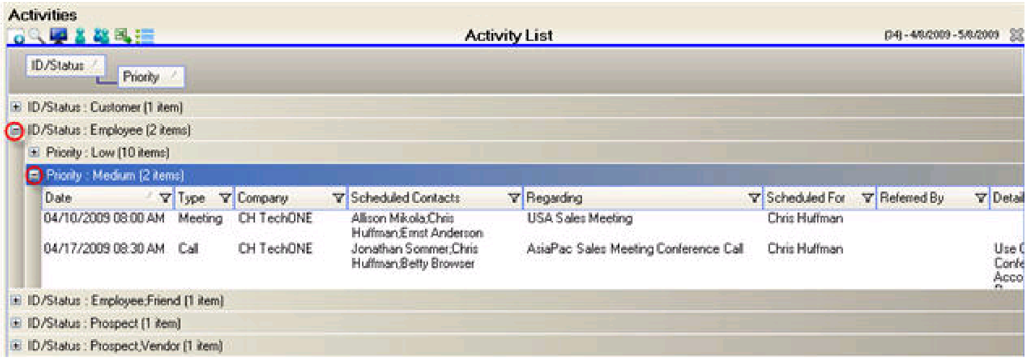
4. Click on the Group button again to turn off grouping.

Multiple Grouping

1. Click on the Grouping icon to display the Grouping Order area.

2. Drag the title bar of the column to group to the area.

3. The tab will be grouped by the data in the column. Use the ' ' symbol in the tree view to see the details.



See also

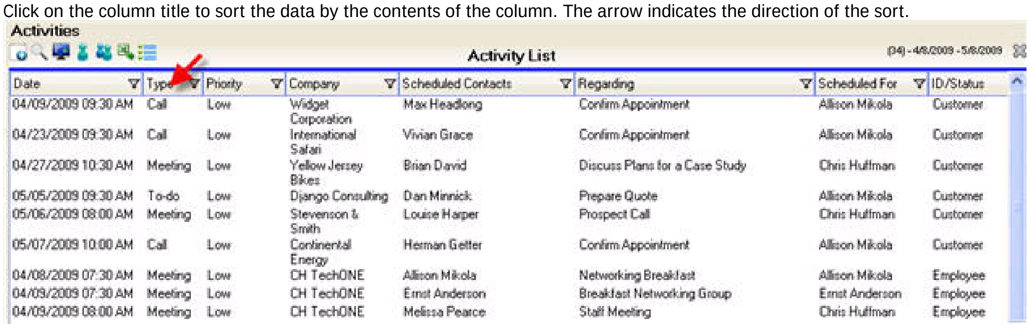
Panel Title
Panel Wizard Icon
Filter Icon
Display Type Icon
User Icon
Contact Group Icon
Export to Excel Icon
List Sorting
List Filtering
List Summaries
Date Range and Record Count

Home > Dashboard Elements > Panel Toolbar > List Sorting

List Sorting

Data in the dashboard can be sorted by values in one field (or column).

1. Click on the column title to sort the data by the contents of the column. The arrow indicates the direction of the sort.



Activities

Activity List (34) - 4/8/2009 - 5/8/2009

Date	Type	Priority	Company	Scheduled Contacts	Regarding	Scheduled For	ID/Status
04/09/2009 09:30 AM	Call	Low	Widget Corporation	Max Headlong	Confirm Appointment	Allison Mikola	Customer
04/23/2009 09:30 AM	Call	Low	International Safari	Vivian Grace	Confirm Appointment	Allison Mikola	Customer
04/27/2009 10:30 AM	Meeting	Low	Yellow Jersey Bikes	Brian David	Discuss Plans for a Case Study	Chris Huffman	Customer
05/05/2009 09:30 AM	To-do	Low	Django Consulting	Dan Minnick	Prepare Quote	Allison Mikola	Customer
05/06/2009 08:00 AM	Meeting	Low	Stevenson & Smith	Louise Harper	Prospect Call	Chris Huffman	Customer
05/07/2009 10:00 AM	Call	Low	Continental Energy	Herman Getter	Confirm Appointment	Allison Mikola	Customer
04/08/2009 07:30 AM	Meeting	Low	CH TechONE	Allison Mikola	Networking Breakfast	Allison Mikola	Employee
04/09/2009 07:30 AM	Meeting	Low	CH TechONE	Ernst Anderson	Breakfast Networking Group	Ernst Anderson	Employee
04/09/2009 08:00 AM	Meeting	Low	CH TechONE	Melissa Pearce	Staff Meeting	Chris Huffman	Employee

2. Data is sorted by column data.

Activities

Activity List (34) - 4/8/2009 - 5/8/2009

Date	Type	Priority	Company	Scheduled Contacts	Regarding	Scheduled For	ID/Status
04/09/2009 09:30 AM	Call	Low	Widget Corporation	Max Headlong	Confirm Appointment	Allison Mikola	Customer
04/17/2009 08:30 AM	Call	Medium	CH TechONE	Jonathan Sommer;Chris Huffman;Betty Browser	AsiaPac Sales Meeting Conference Call	Chris Huffman	Employee
04/21/2009 09:30 AM	Call	Low	Great Northern Coffee	Tommy Morgan	Prospect Call	Allison Mikola	Prospect
04/22/2009 10:00 AM	Call	Low	Nagengast Estate Winery	Scott Nagengast	Get the Order	Ernst Anderson	Prospect;Ve
04/23/2009 09:30 AM	Call	Low	International Safari	Vivian Grace	Confirm Appointment	Allison Mikola	Customer
04/24/2009 08:30 AM	Call	Medium	CH Gourmet Coffee	Fred Fenderline;Sarah Whiting;Chris Huffman	European Sales Meeting Conference Call	Chris Huffman	Employee;Fr
05/07/2009 10:00 AM	Call	Low	Continental Energy	Herman Getter	Confirm Appointment	Allison Mikola	Customer

See also

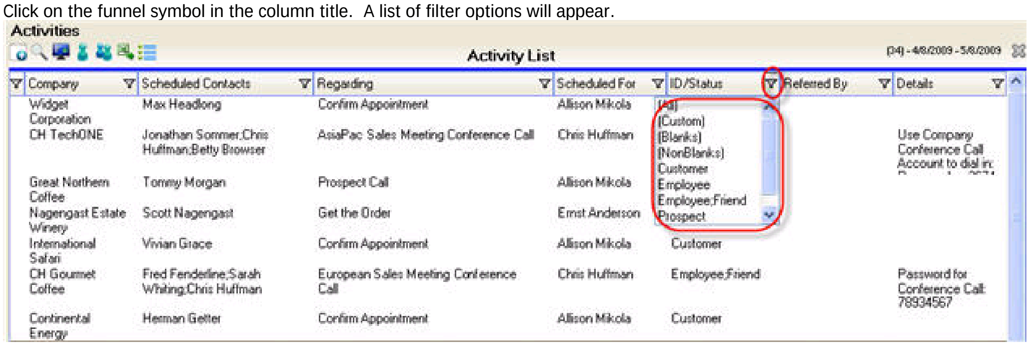
Panel Title
Panel Wizard Icon
Filter Icon
Display Type Icon
User Icon
Contact Group Icon
Export to Excel Icon
Grouping Icon
List Filtering
List Summaries
Date Range and Record Count

Home > Dashboard Elements > Panel Toolbar > List Filtering

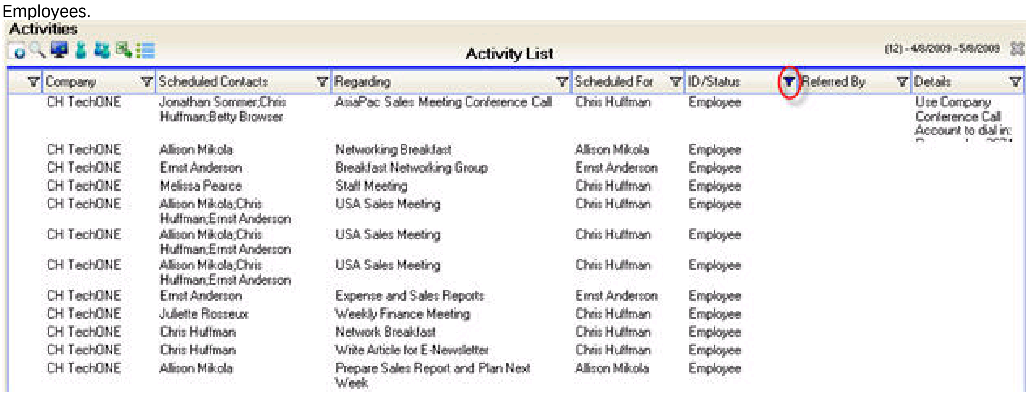
List Filtering

List Filtering can further restrict the data displayed in the List View. Multiple columns can be filtered at the same time.

1. Click on the funnel symbol in the column title. A list of filter options will appear.



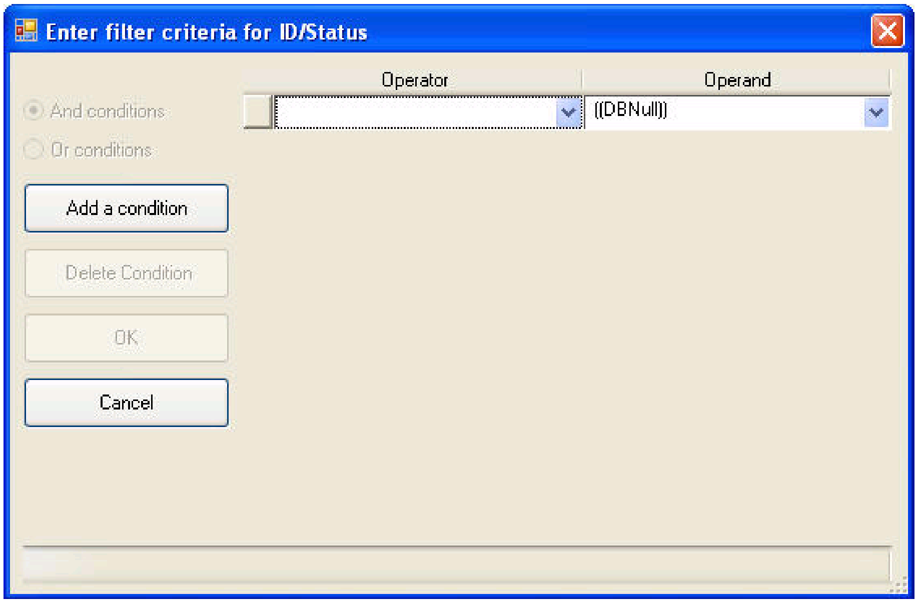
2. Filter options are:
    1. All (or Remove Filter)
    2. Custom
    3. Blanks (all rows which have this column blank)
    4. NonBlanks (all rows which have data in this column)
    5. Unique values found in the column
3. Data is filtered by column selection. The colored funnel indicates a filter is being used. In this example, ID Status is filtered to only show Employees.



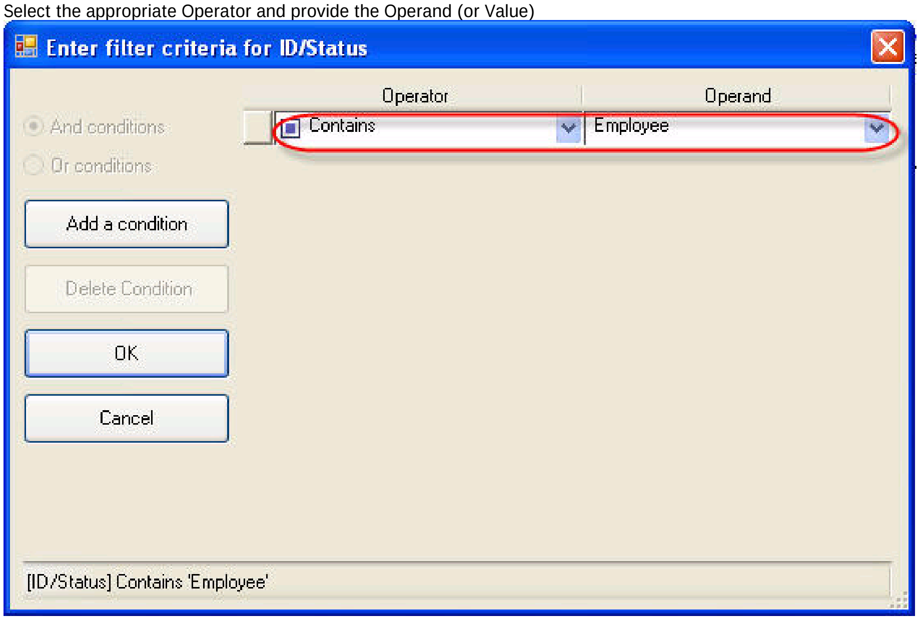
Custom Filters

Custom filter behave like simple queries. Conditions can either be ALL "and" or ALL "or".

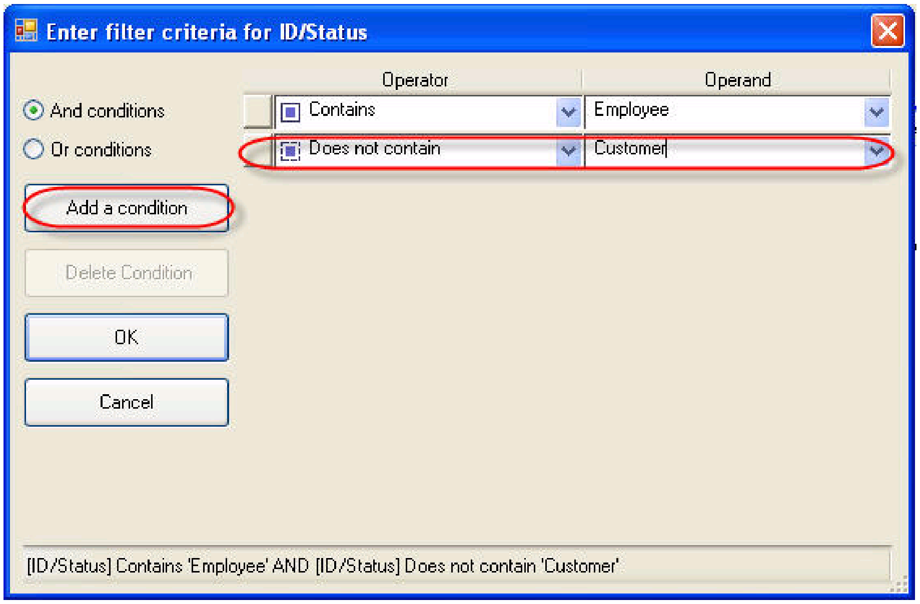
1. If a custom filter is selected, the Custom Filter dialog box will appear.



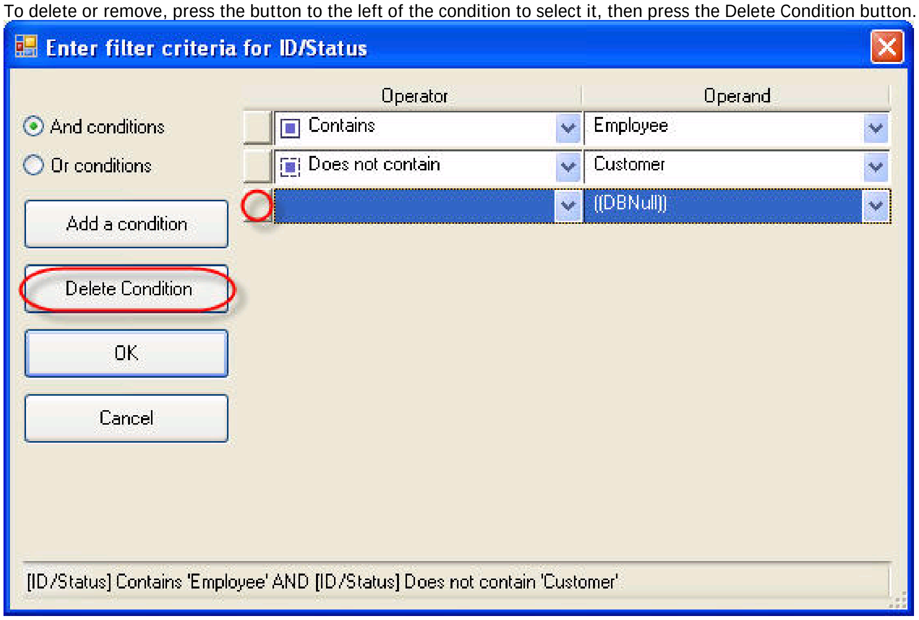
2. Select the appropriate Operator and provide the Operand (or Value)



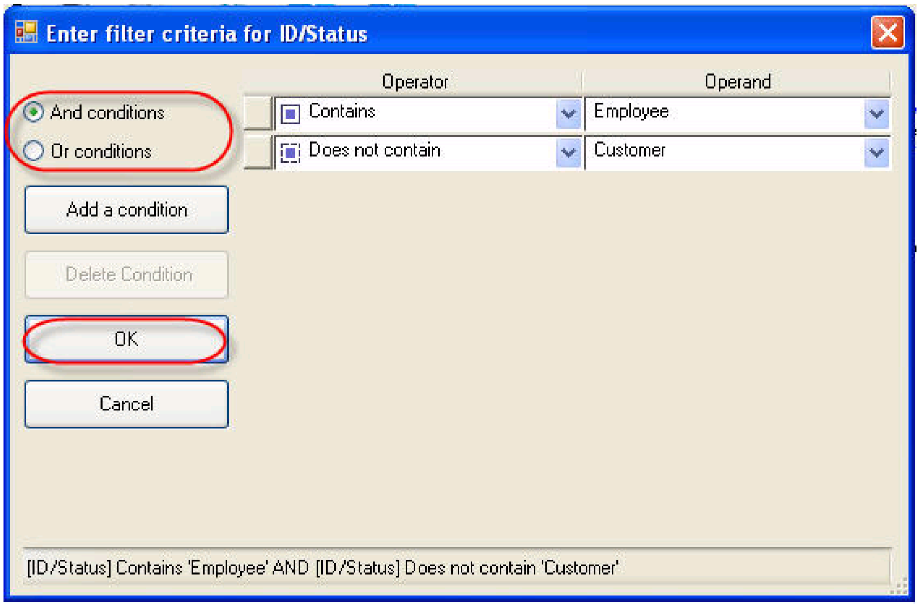
3. Click on the Add a Condition button to add additional conditions to the filter.



4. To delete or remove, press the button to the left of the condition to select it, then press the Delete Condition button.



5. All conditions must be either And or Or. Select the appropriate conjunction and click OK to finish.



6. The resulting filter is then displayed. In this example, Activities for Contacts who's ID/Status contains Employee, but not Customer, are displayed.

See also

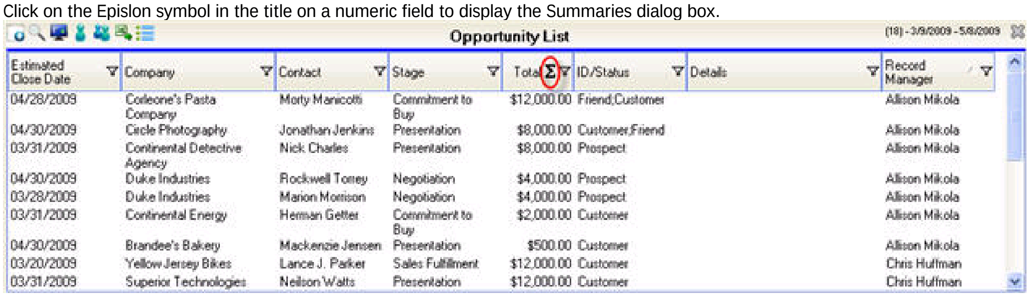
Panel Title
Panel Wizard Icon
Filter Icon
Display Type Icon
User Icon
Contact Group Icon
Export to Excel Icon
Grouping Icon
List Sorting
List Summaries
Date Range and Record Count

Home > Dashboard Elements > Panel Toolbar > List Summaries

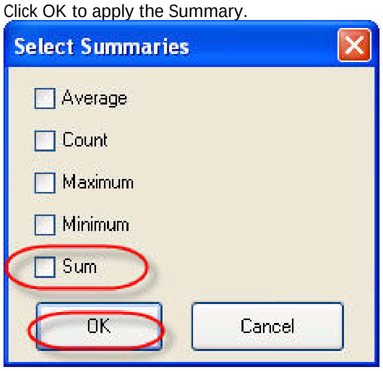
List Summaries

Numeric columns (i.e. Numbers, Currency, Decimal fields) in the dashboard can include summaries for the entire data set or for each grouping.

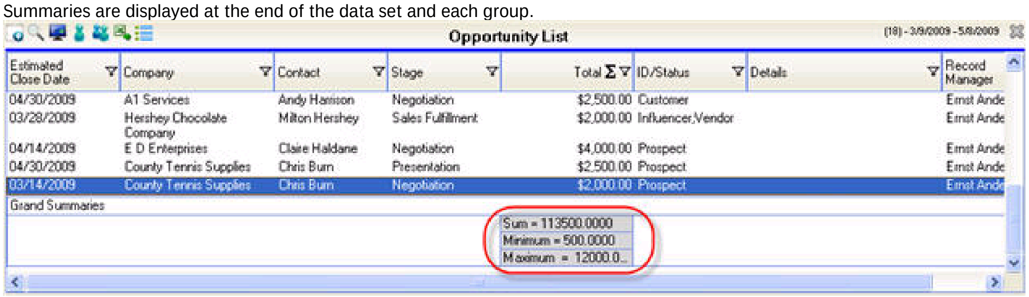
1. Click on the Epislon symbol in the title on a numeric field to display the Summaries dialog box.



2. The summaries available are:
   1. Average
   2. Count
   3. Maximum
   4. Minimum
   5. Sum (or Total)
3. Click OK to apply the Summary.



4. Summaries are displayed at the end of the data set and each group.



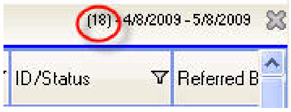
See also

Panel Title
Panel Wizard Icon
Filter Icon
Display Type Icon
User Icon
Contact Group Icon
Export to Excel Icon
Grouping Icon
List Sorting
List Filtering
Date Range and Record Count

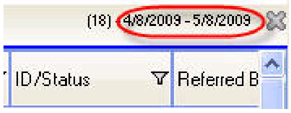
Date Range and Record Count

The upper right hand corner of the dashboard List View will display two important values:

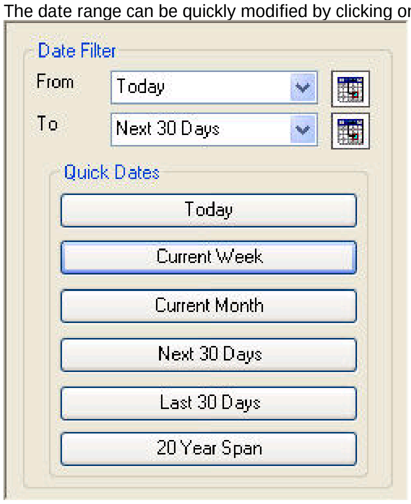
1. The total number of records in the displayed data set.



2. The date range being used for the data set.



3. The date range can be quickly modified by clicking on it. A date range dialog box will appear.



See also

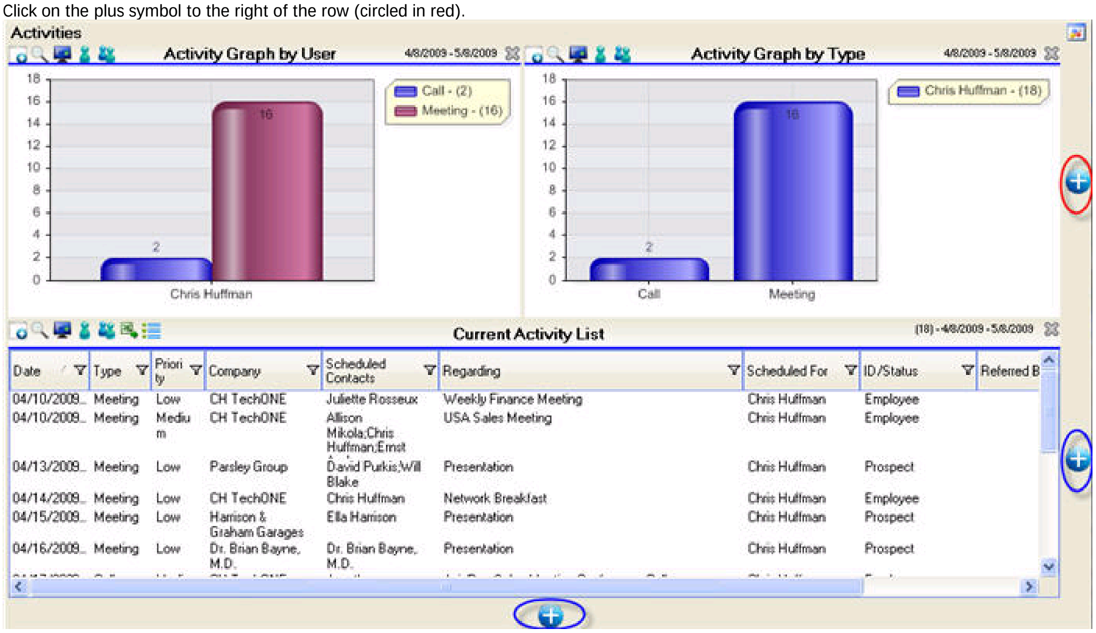
Panel Title
Panel Wizard Icon
Filter Icon
Display Type Icon
User Icon
Contact Group Icon
Export to Excel Icon
Grouping Icon
List Sorting
List Filtering
List Summaries

Home > Dashboard Elements > Rows and Columns

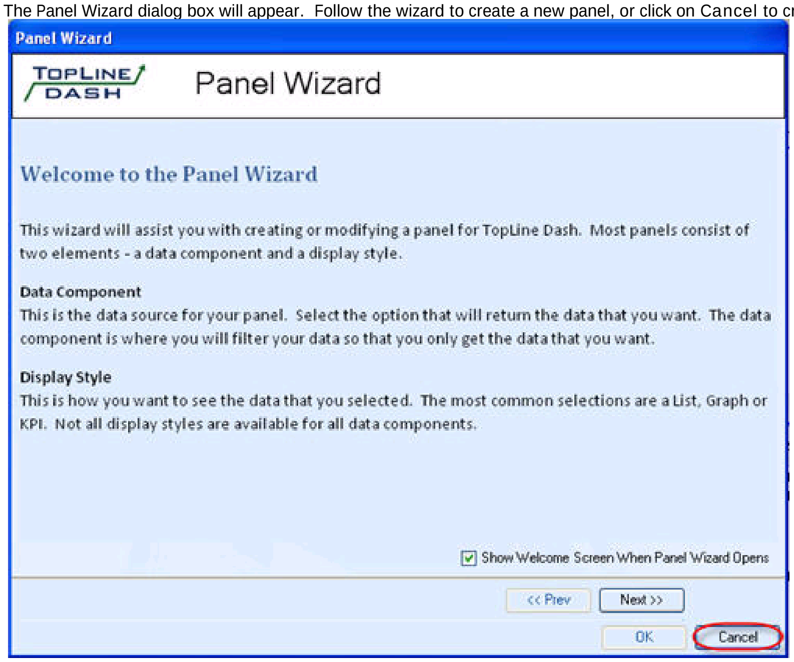
Rows and Columns

Additional panels can be added to the TopLine Dash dashboard by using the Add Column and Add Row buttons located at the right and bottom of the TopLine Dash screen.

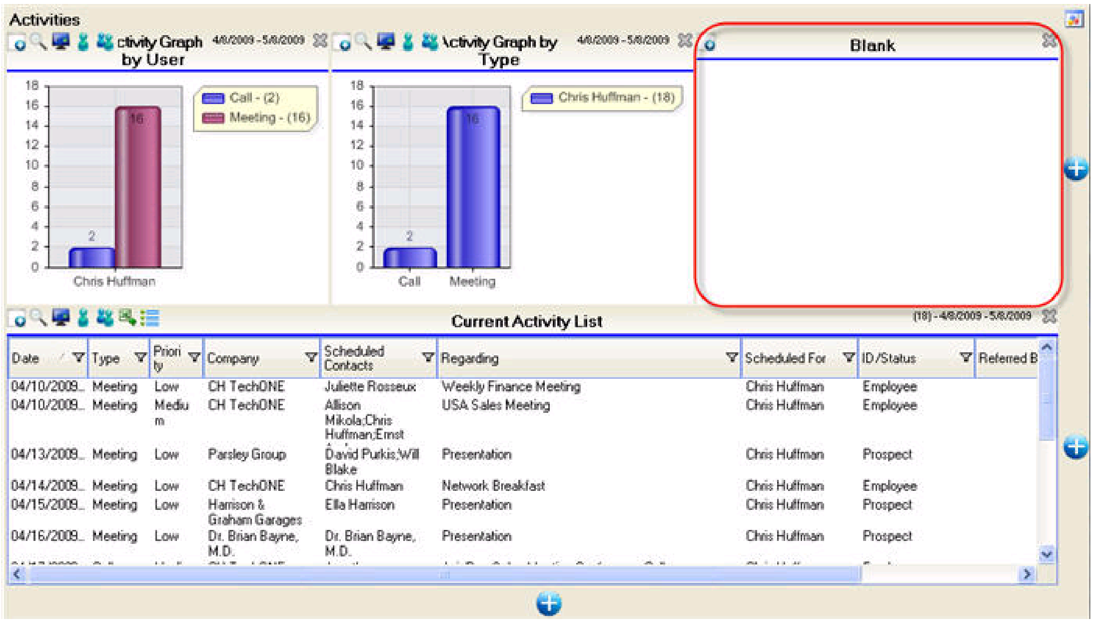
1. Click on the plus symbol to the right of the row (circled in red).



2. The Panel Wizard dialog box will appear. Follow the wizard to create a new panel, or click on Cancel to create a blank one.



3. A blank panel is inserted.



NOTE: Refer to Advanced Functions for [Moving Panels]and [Copying Panels].

See also

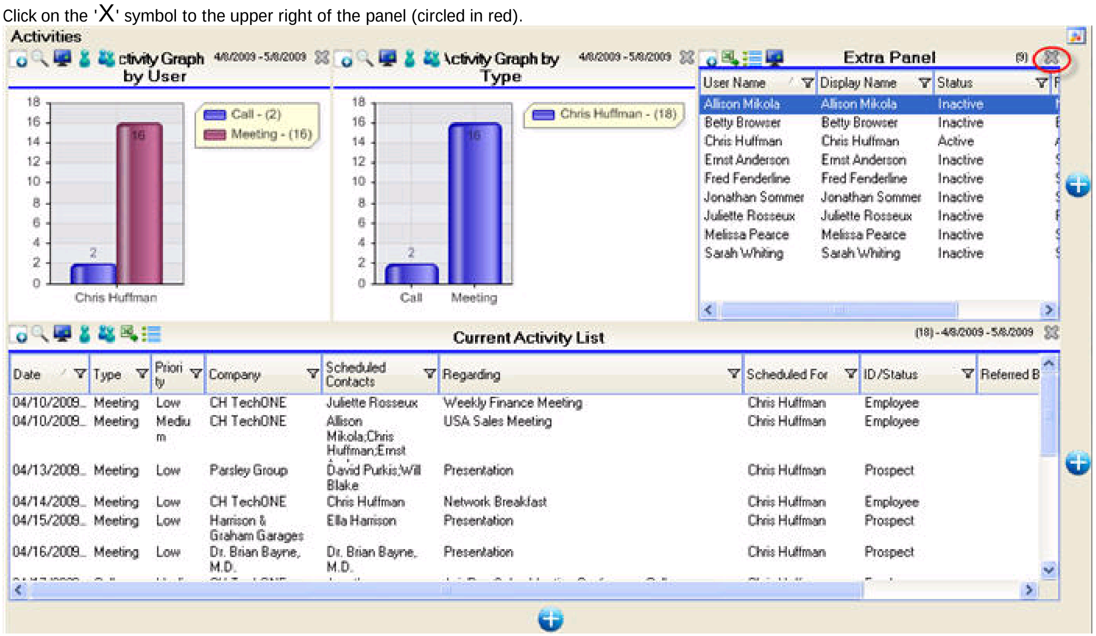
Change Dashboard Title
Dashboard Tabs
Dashboard Toolbar
Panel Toolbar
Deleting Panels

Home > Dashboard Elements > Deleting Panels

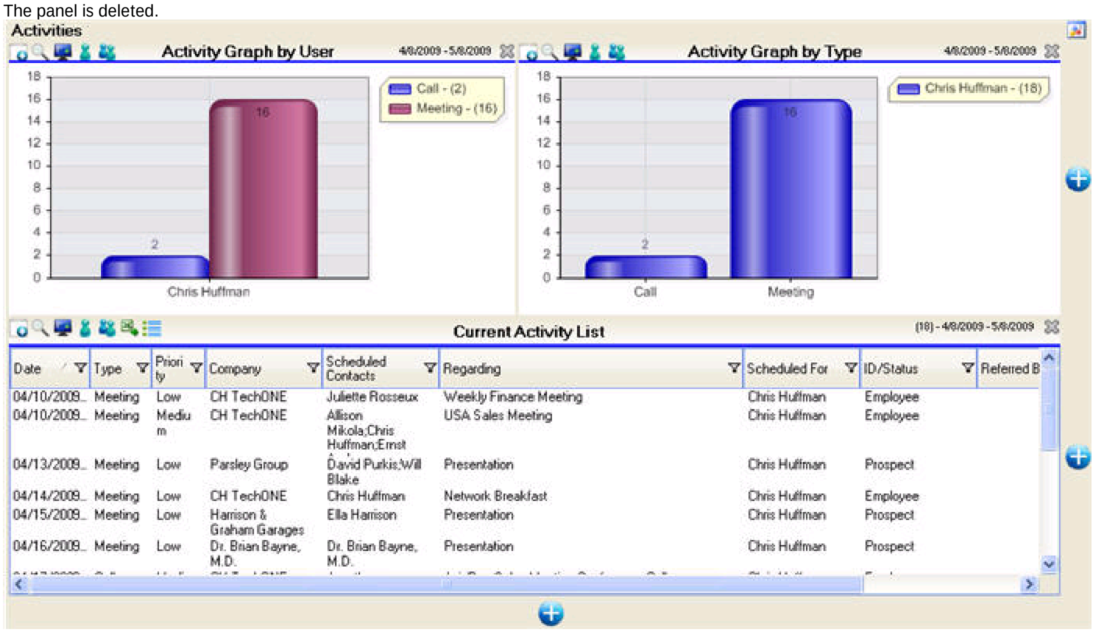
Deleting Panels

Click on the X in the upper right corner of a panel to delete it. Be careful, as there is no confirmation. Any adjoining panels on the same row will be expanded.

1. Click on the 'X' symbol to the upper right of the panel (circled in red).



2. The panel is deleted.



See also

Change Dashboard Title
Dashboard Tabs
Dashboard Toolbar
Panel Toolbar
Rows and Columns

Home > Dashboard Panels

Dashboard Panels

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

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

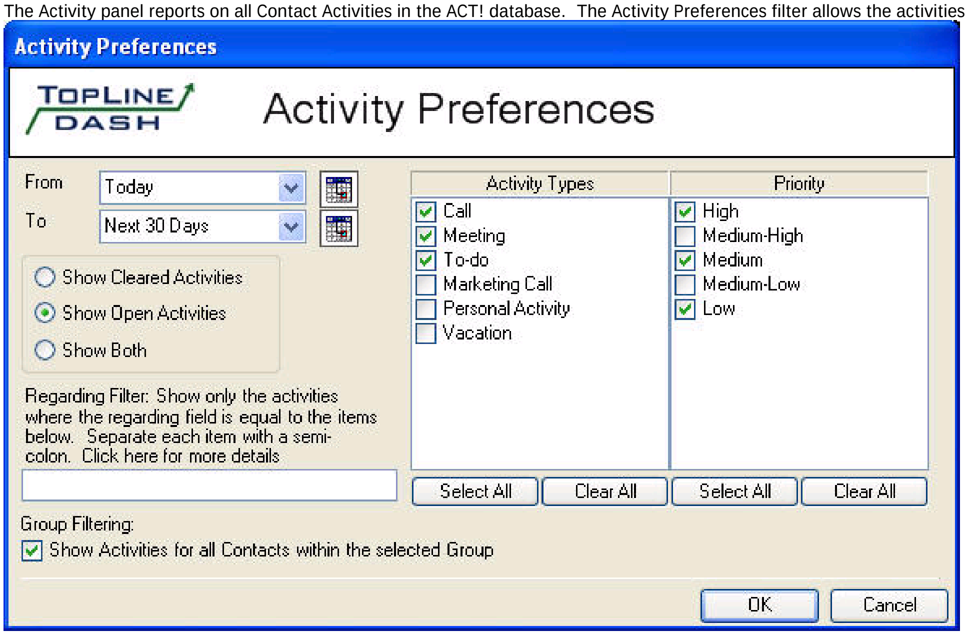
See also

Welcome
Installation
Dashboard Elements
Advanced Functions
Tutorials
Dashboard Editions
FAQ

Home > Dashboard Panels > Activities

Activities

The Activity panel reports on all Contact Activities in the ACT! database. The Activity Preferences filter allows the activities to be filtered by:



1. Start and End date. These dates can be absolute (i.e. 1/1/2009) or relative (by using the keywords in the drop down.) Relative dates can also be customized, as described in Custom Relative Dates.
2. Open, Cleared or Both Status.
3. The Regarding field of the activity. Show only activities where the words in the box are in the Regarding field. Separate each word with a semicolon for more than one.
4. Activity Type: Custom Activities are automatically added to this list.
5. Priority.

The Activity Panel will show the fields for each: (See List View for how to add these fields)

- Activity
- Contact of the Activity
- Company of the related Contact

From the Activity List View, right clicking an item allows the following functions:

- Reschedule Activity: Change the date of the activity to an absolute date, or by a relative amount
(screen shot)
- Update Fields: Allows a Replace, Add To, or Remove From text from selected fields.
(screen shot)
- Clear Activity
- Delete Activity
- Go To Contact: Go directly to the Contact Detail view of the select activity
- Go To Company: Go directly to the Company Detail view of the selected activity

The right click feature can be applied to multiple selected items.

See also

Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes

Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Companies

The Company panel reports on all Company Records in the ACT! database. There is no Company Preferences filter. However it is possible just like it is on any entity to filter on any field available in the company table.

The Company Panel will show the fields for each: (See List View for how to add these fields)

- Company

From the Company List View, right clicking an item allows the following functions:

- Delete Company
- Go To Company: Go directly to the Company Detail view of the selected activity

The right clicking feature can be applied to multiple selected items.

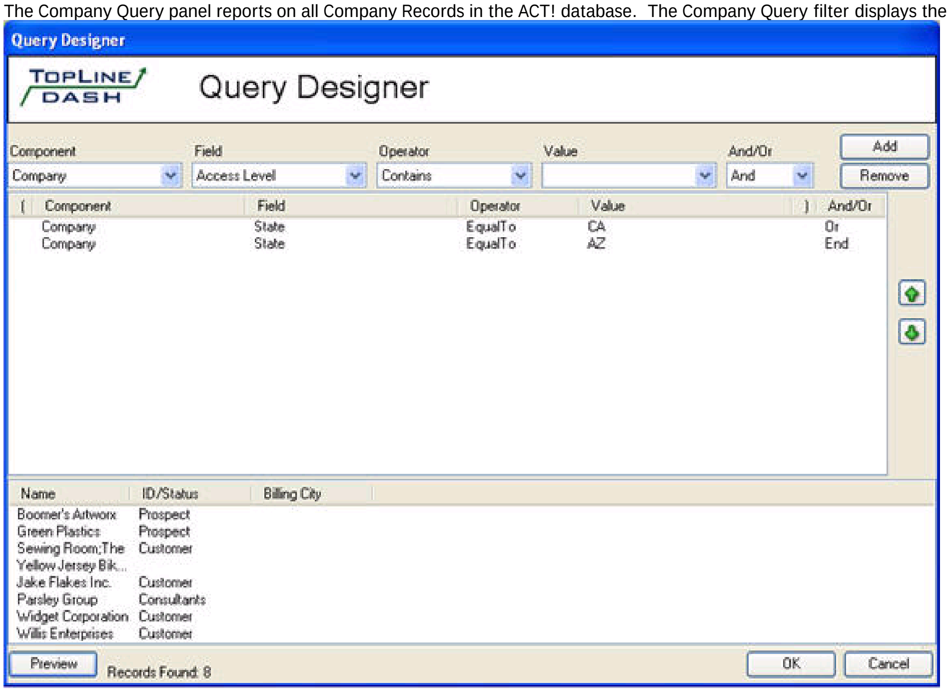
See also

Activities
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Company Query

Company Query

The Company Query panel reports on all Company Records in the ACT! database. The Company Query filter displays the Dash Query Designer:



The Company Query Panel will show the fields for each: (See List View for how to add these fields)

- Company

From the Company Query List View, right clicking an item allows the following functions:

- Go To Company: Go directly to the Company Detail view of the selected activity

The right clicking feature can be applied to multiple selected items.

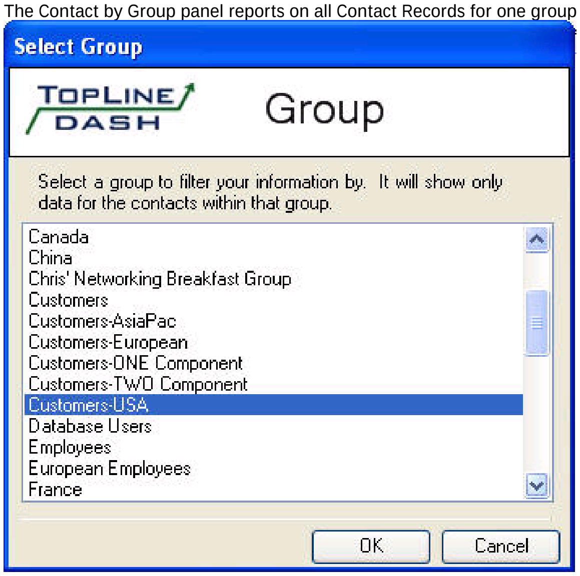
See also

Activities
Companies
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Contacts by Group

Contacts by Group

The Contact by Group panel reports on all Contact Records for one group in the ACT! database. The Contact Query filter displays the Contact Group:



The Contact by Group Panel will show the fields for each: (See List View for how to add these fields)

- Contact
- Company of the related Contact
- Most recent, open Activity of the related Contact

From the Contact by Group List View, right clicking an item allows the following functions:

- Go To Contact: Go directly to the Contact Detail view of the selected contact

The right clicking feature can be applied to multiple selected items.

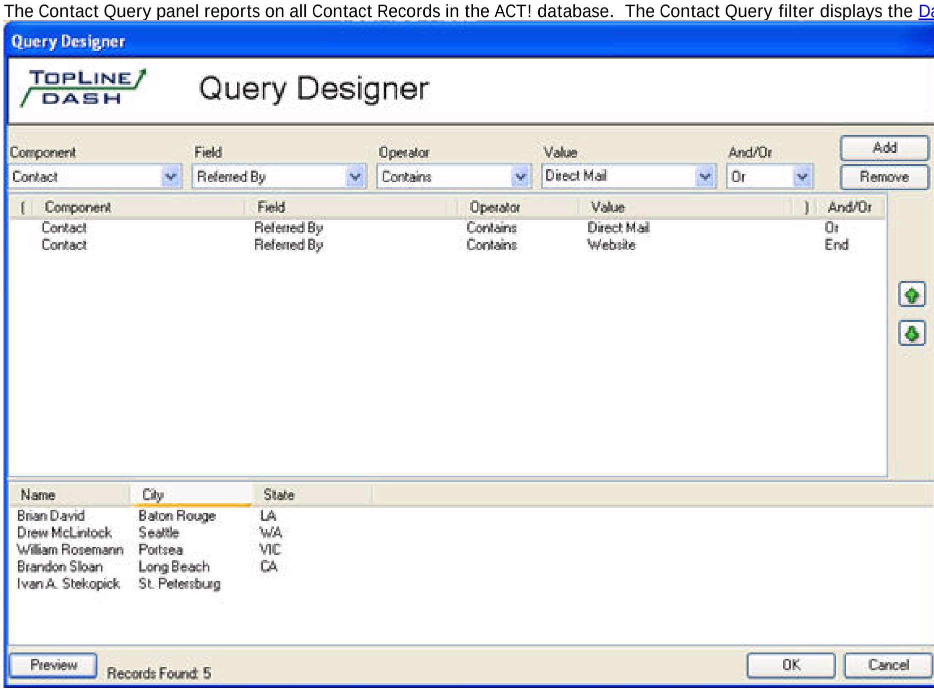
See also

Activities
Companies
Company Query
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Contact Query

Contact Query

The Contact Query panel reports on all Contact Records in the ACT! database. The Contact Query filter displays the Dash Query Designer:



The Contact Query Panel will show the fields for each: (See List View for how to add these fields)

- Contact
- Company of the related Contact
- Most recent, open Activity of the related Contact

From the Contact Query List View, right clicking an item allows the following functions:

- Go To Contact: Go directly to the Contact Detail view of the selected contact

The right clicking feature can be applied to multiple selected items.

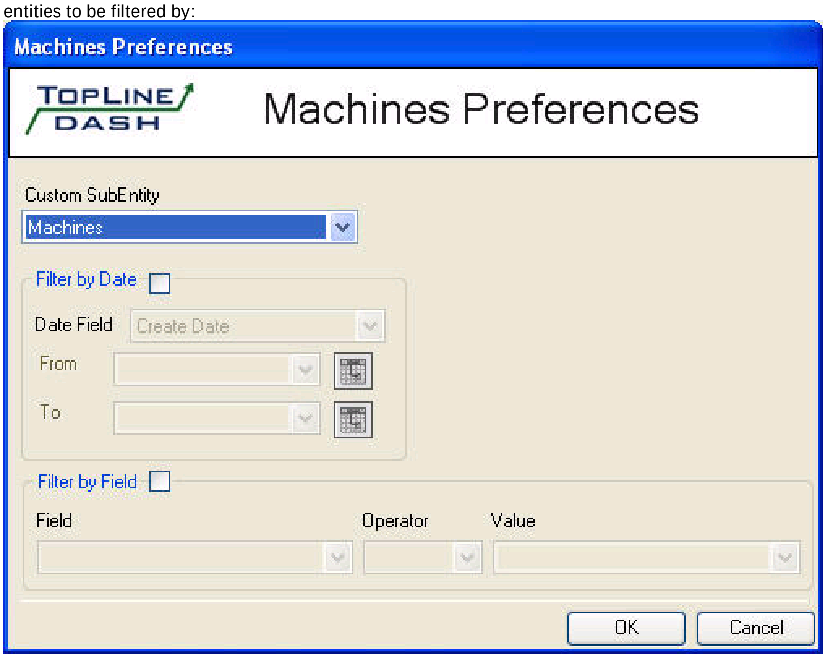
See also

Activities
Companies
Company Query
Contacts by Group
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Custom Sub Entity

Custom Sub Entity

The Custom Sub Entity panel reports on all Custom Sub Entities in the ACT! database. The Custom Sub Entity Preferences filter allows the custom sub entities to be filtered by:



1. Any of the multiple Custom Sub Entities.
2. Date Field to be used in Date Filter:
   - Create Date
   - Edit Date
3. Start and End date. These dates can be absolute (i.e. 1/1/2009) or relative (by using the keywords in the dropdown.) Relative dates can also be customized, as described in Custom Relative Dates.
4. One of any of the fields in the Custom Sub Entity.

The Custom Sub Entity Panel will show the fields for each: (See List View for how to add these fields)

- Custom Sub Entity
- Contact of the Custom Sub Entity
- Company of the related Contact
- Group

From the Custom Sub Entity List View, right clicking an item allows the following functions:

- Delete Custom Sub Entity
- Go To Contact: Go directly to the Contact Detail view of the selected Custom Sub Entity
- Go To Company: Go directly to the Company Detail view of the selected Custom Sub Entity
- Go To Group: Go directly to the Group Detail view of the selected Custom Sub Entity

The right clicking feature can be applied to multiple selected items.

See also

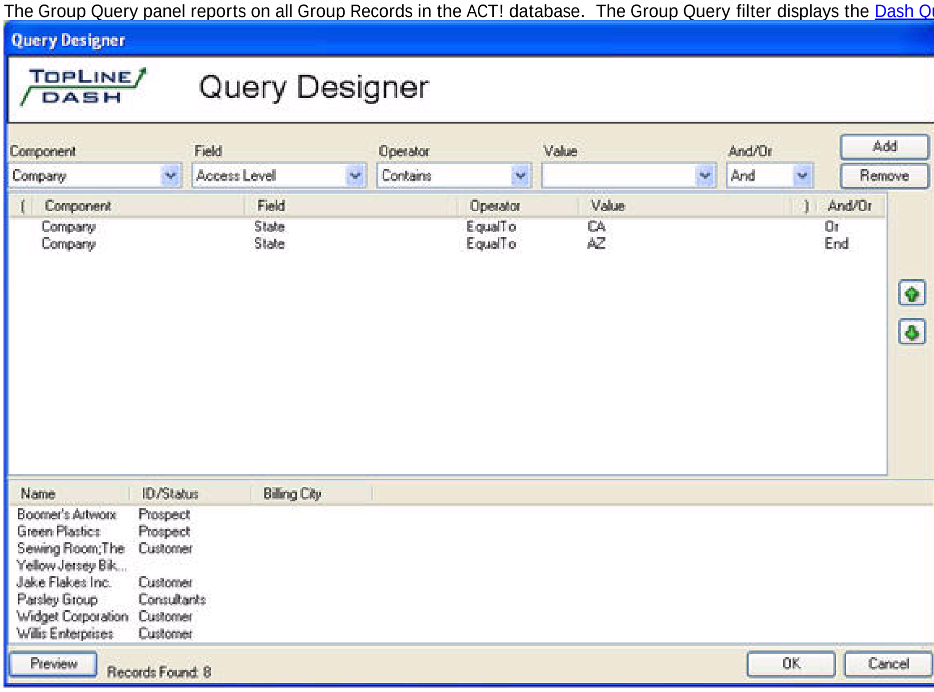
Activities
Companies
Company Query
Contacts by Group
Contact Query
Group Query
Histories
Notes
Opportunities

- Opportunity Query
- Products
- Synchronization
- Users
- Other - Contact Details
- Other - Calendar
- Other - Database Update
- Panel Comparison

Home > Dashboard Panels > Group Query

Group Query

The Group Query panel reports on all Group Records in the ACT! database. The Group Query filter displays the Dash Query Designer:



The Group Query Panel will show the fields for each: (See List View for how to add these fields)

- Group

From the Group Query List View, right clicking an item allows the following functions:

- Go To Group: Go directly to the Group Detail view of the selected group

The right clicking feature can be applied to multiple selected items.

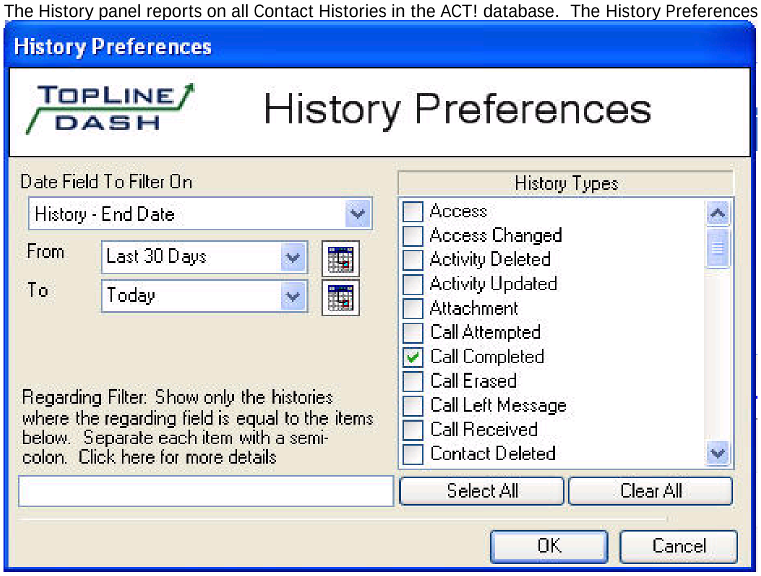
See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Histories

History Preferences

The History panel reports on all Contact Histories in the ACT! database. The History Preferences filter allows the histories to be filtered by:



1. Date Field to be used in Date Filter:
   - Create Date
   - Edit Date
   - End Date (Cleared Date)
2. Start and End date. These dates can be absolute (i.e. 1/1/2009) or relative (by using the keywords in the dropdown.) Relative dates can also be customized, as described in Custom Relative Dates.
3. The Regarding field of the history. Show only histories where the words in the box are in the Regarding field. Separate each word with a semicolon for more than one.
4. Any combination of History Types. Cleared Custom Activities are automatically added to this list.

The History Panel will show the fields for each: (See List View for how to add these fields)

- History
- Contact of the History
- Company of the related Contact
- Group of related Contact

From the History List View, right clicking an item allows the following functions:

- Email History
- Update Fields: Allows a Replace, Add To, or Remove From text from selected fields.
  (screen shot)
- Delete History
- Go To Contact: Go directly to the Contact Detail view of the selected history

The right clicking feature can be applied to multiple selected items.

See also

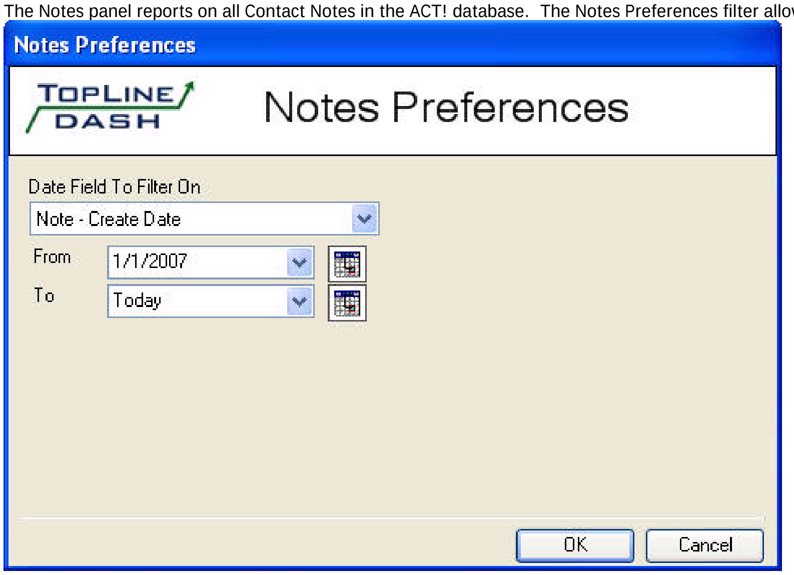
Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Notes
Opportunities
Opportunity Query
Products

Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Notes

Notes

The Notes panel reports on all Contact Notes in the ACT! database. The Notes Preferences filter allows the notes to be filtered by:



1. Date Field to be used in Date Filter:
   - Create Date
   - Edit Date
2. Start and End date. These dates can be absolute (i.e. 1/1/2009) or relative (by using the keywords in the dropdown.) Relative dates can also be customized, as described in Custom Relative Dates.

The Notes Panel will show the fields for each: (See List View for how to add these fields)

- Note
- Contact of the Note
- Company of the related Contact

From the Notes List View, right clicking an item allows the following functions:

- Delete Note
- Go To Contact: Go directly to the Contact Detail view of the selected note

The right clicking feature can be applied to multiple selected items.

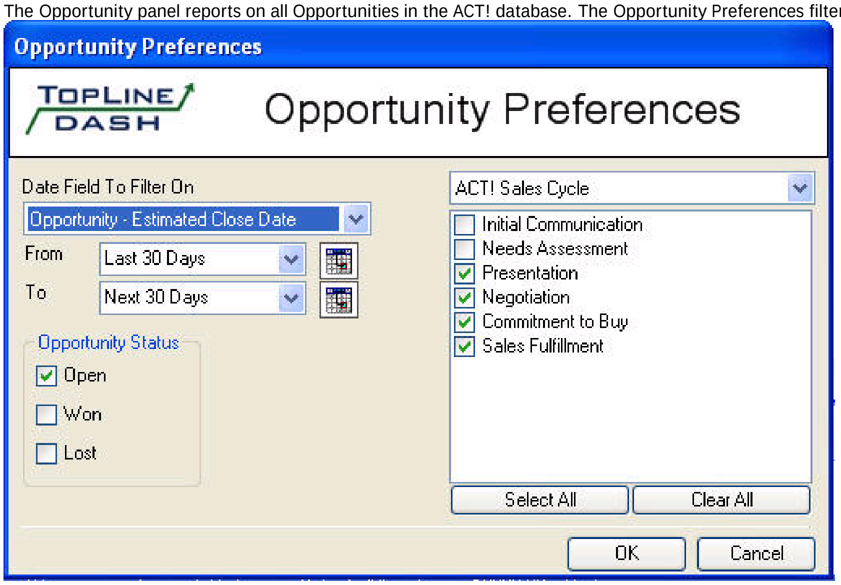
See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Opportunities

Opportunities

The Opportunity panel reports on all Opportunities in the ACT! database. The Opportunity Preferences filter allows the Product to be filtered by:



1. Date Field to be used in Date Filter:
   - Actual Close Date
   - Create Date
   - Edit Date
   - Estimated Close Date
   - Open Date
   - Any Opportunity User Field redefined as a Date Field Type.
2. Start and End date. These dates can be absolute (i.e. 1/1/2009) or relative (by using the keywords in the dropdown.) Relative dates can also be customized, as described in Custom Relative Dates.
3. Any combination of Open, Won or Lost Opportunity Status.
4. Any combination of stages from one Sales Process. If more than one Sales Process is needed, use Opportunity Query.

The Opportunity Panel will show the fields for each: (See List View for how to display these fields)

- Opportunity
- Contact of the Opportunity
- Company of the related Contact
- Most recent, open Activity of the related Contact

From the Opportunity List View, right clicking an item allows the following functions:

- Update Record Manager of the Opportunity
- Update Stage of the Opportunity
- Update Status of the Opportunity
- Delete Opportunity
- Update Fields: Allows a Replace, Add To, or Remove From text from selected fields.
  (screen shot)
- Create Follow up activity
- Go To Contact: Go directly to the Contact Detail view of the selected Opportunity

The right clicking feature can be applied to multiple selected items.

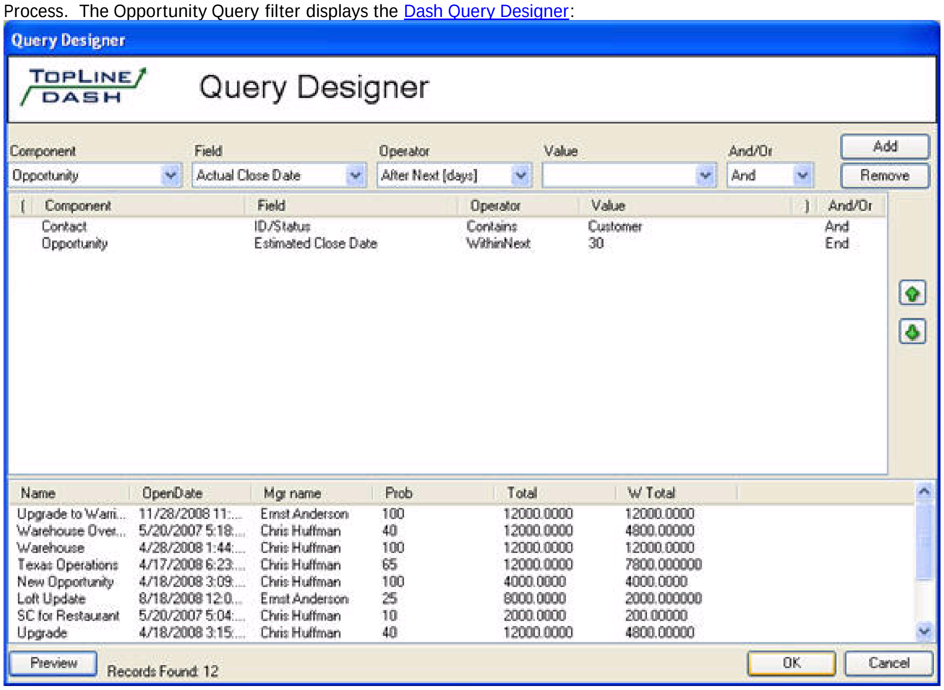
See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Opportunity Query

Opportunity Query

The Opportunity Query panel reports on all Contact Opportunities in the ACT! database. It is ideal for display opportunities regardless of Sales Process. The Opportunity Query filter displays the Dash Query Designer:



The Opportunity Query Panel will show the fields for each: (See List View for how to display these fields)

- Opportunity
- Contact of the Opportunity
- Company of the related Contact
- Most recent, open Activity of the related Contact

From the Opportunity Query List View, right clicking an item allows the following functions:

- Update Record Manager of the Opportunity
- Update Stage of the Opportunity
- Update Status of the Opportunity
- Delete Opportunity
- Update Fields: Allows a Replace, Add To, or Remove From text from selected fields. (screen shot)
- Create Follow up activity
- Go To Contact: Go directly to the Contact Detail view of the select Opportunity

The right clicking feature can be applied to multiple selected items.

See also

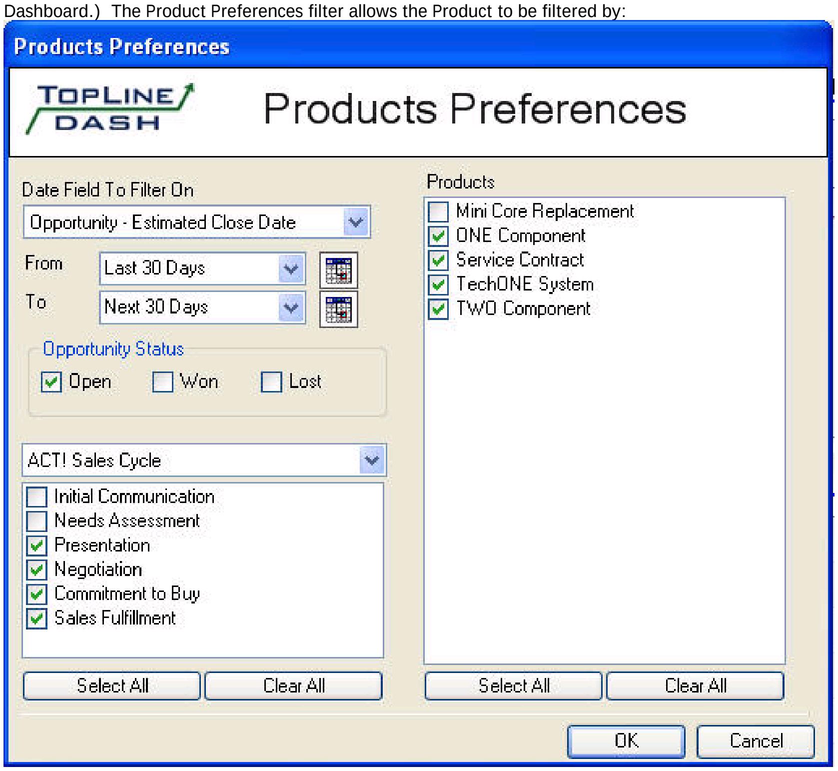
Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Products
Synchronization

Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Products

Products

The Product panel reports on all Products and their associated Opportunities in the ACT! database. (This functionality in not possible in the ACT! Dashboard.) The Product Preferences filter allows the Product to be filtered by:



1. Date Field to be used in Date Filter:
   - Actual Close Date
   - Create Date
   - Edit Date
   - Estimated Close Date
   - Open Date
   - Any Opportunity User Field redefined as a Date Field Type.
2. Start and End date. These dates can be absolute (i.e. 1/1/2009) or relative (by using the keywords in the dropdown.) Relative dates can also be customized, as described in Custom Relative Dates.
3. Any combination of Open, Won or Lost Opportunity Status.
4. Any combination of stages from just one Sales Process.
5. Any combination of products. Products are automatically generated from the product List. To display ALL products, including those not on the list, Clear All products.

The Product Panel will show the fields for each: (See List View for how to display these fields)

- Product
- Opportunity of the product
- Contact of the Opportunity
- Company of the related Contact

From the Product List View, right clicking an item allows the following functions:

- Update Record Manager of the Opportunity
- Update Stage of the Opportunity
- Update Status of the Opportunity
- Delete Opportunity
- Update Fields: Allows a Replace, Add To, or Remove From text from selected fields.
  (screen shot)

- Go To Contact: Go directly to the Contact Detail view of the select product
- Go To Company: Go directly to the Company Detail view of the selected product

The right clicking feature can be applied to multiple selected items.

See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Synchronization

Synchronization

The Synchronization panel reports on all Remote Databases in the ACT! database. There is no Synchronization Preferences filter.

The User Panel will show the fields for each user which includes: (See List View for how to display these fields)

- Remote Name
- Status (Active, Inactive)
- Create Date
- # Days Left
- # Syncs Completed
- Last Attempt Date
- Last Complete Date
- Last Success Date
- Last Sync Duration
- Receive Attempt Date
- Receive Success Date

From the Synchronization List View, right clicking functions are not available.

See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Users
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Users

Users

The User panel reports on all User Records in the ACT! database. There is no User Preferences filter.

The User Panel will show the fields for each user which includes: (See List View for how to display these fields)

- User Name
- Display Name
- Status (Active, Inactive, Pending Logon)
- Role (Administrator, Manager, Standard, Restricted, Browse)
- Last Logon Date
- # of Days since Last Logon

From the User List View, right clicking an item allows the following functions:

- Add Delete Permissions
- Remove Delete Permissions

The right clicking feature can be applied to multiple selected items.

See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Other - Contact Details
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Other - Contact Details

Other - Contact Details

This Panel does not work in v7.1.

See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Calendar
Other - Database Update
Panel Comparison

Home > Dashboard Panels > Other - Calendar

Other - Calendar

This Panel does not work in v7.1.

See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Database Update
Panel Comparison

Other - Database Update

This Panel does not work in v7.1.

See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Panel Comparison

Home > Dashboard Panels > Panel Comparison

Panel Comparison

This table shows which fields can be displayed from each panel.

	Show the fields from:					
Panel	Primary	Contact	Company	Group	Activity	Opportunity
Activities	Activity	Yes	Yes		Yes	
Companies	Company		Yes			
Company Query	Company		Yes			
Contacts by Group	Contact	Yes	Yes		Latest	
Contact Query	Contact	Yes	Yes		Latest	
Custom Sub Entity	Custom Sub Entity	Yes	Yes	Yes		
Group Query	Group			Yes		
Histories	History	Yes	Yes	Yes		
Notes	Notes	Yes	Yes			
Opportunities	Opportunity	Yes	Yes		Latest	Yes
Opportunity Query	Opportunity	Yes	Yes		Latest	Yes
Products	Products	Yes	Yes		Latest	Yes
Synchronization	Remote DB					
Users	Users					

See also

Activities
Companies
Company Query
Contacts by Group
Contact Query
Custom Sub Entity
Group Query
Histories
Notes
Opportunities
Opportunity Query
Products
Synchronization
Users
Other - Contact Details
Other - Calendar
Other - Database Update

Home > Advanced Functions

Articles in this section

Dash Query Designer	Renaming Dashboards	Protecting Dashboards	Deleting Dasboards	Dashboard Sub Folders	Custom Relative Dates
Copying Panels	Moving Panels	Printing to PDF	Printing to Excel	Update Fields	

See also

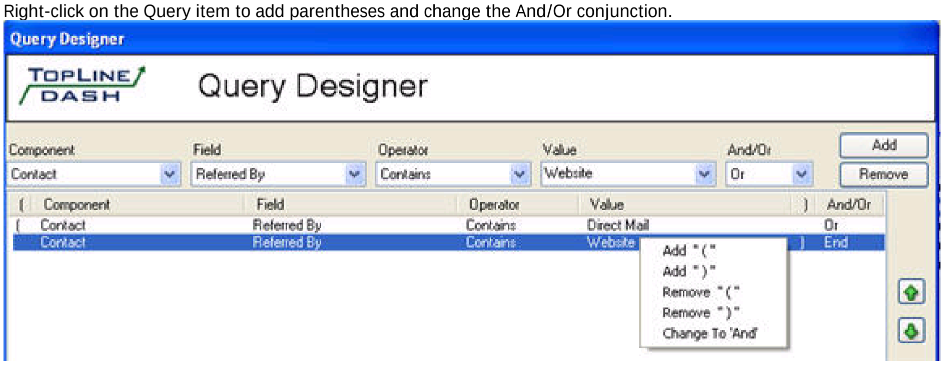
Welcome
Installation
Dashboard Elements
Dashboard Panels
Tutorials
Dashboard Editions
FAQ

Home > Advanced Functions > Dash Query Designer

Dash Query Designer

The TopLine Dash Query Designer differs from the ACT! Advanced Query in the following features:

1. Items in the Query cannot be edited - they must be deleted and added again.
2. Right-click on the Query item to add parentheses and change the And/Or conjunction.



See also

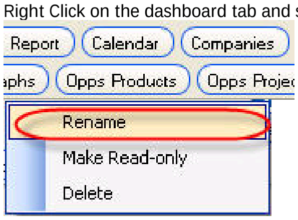
Renaming Dashboards
Protecting Dashboards
Deleting Dasboards
Dashboard Sub Folders
Custom Relative Dates
Copying Panels
Moving Panels
Printing to PDF
Printing to Excel
Update Fields

Home > Advanced Functions > Renaming Dashboards

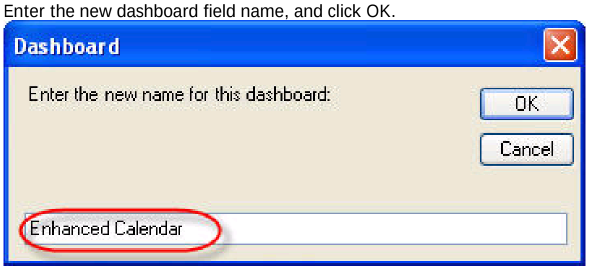
Renaming Dashboards

To rename a TopLine Dash dashboard:

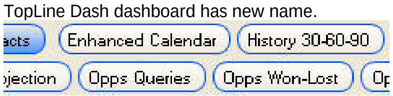
1. Right Click on the dashboard tab and select Rename.



2. Enter the new dashboard field name, and click OK.



3. TopLine Dash dashboard has new name.



NOTE: If the currently displayed dashboard is renamed, a SAVE AS is actually performed.

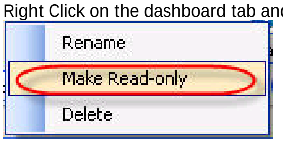
See also

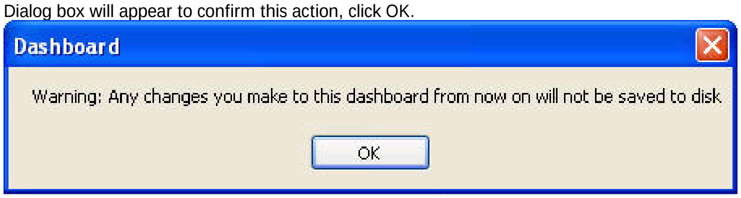
Dash Query Designer
Protecting Dashboards
Deleting Dasboards
Dashboard Sub Folders
Custom Relative Dates
Copying Panels
Moving Panels
Printing to PDF
Printing to Excel
Update Fields

Home > Advanced Functions > Protecting Dashboards

Protecting Dashboards

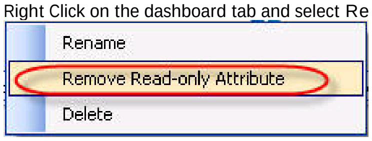
To protect a TopLine Dash dashboard and make it read-only so changes can be made:

1. Right Click on the dashboard tab and select Make Read-only.


2. Dialog box will appear to confirm this action, click OK.


3. TopLine Dash dashboard is now protected.

To unprotect a TopLine Dash dashboard:

1. Right Click on the dashboard tab and select Remove Read-only attribute.


2. Dialog box will appear to confirm this action, click OK.


3. TopLine Dash dashboard is now unprotected.

See also

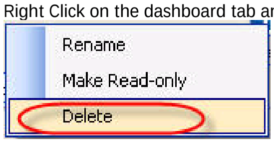
Dash Query Designer
Renaming Dashboards
Deleting Dasboards
Dashboard Sub Folders
Custom Relative Dates
Copying Panels
Moving Panels
Printing to PDF
Printing to Excel
Update Fields

Home > Advanced Functions > Deleting Dasboards

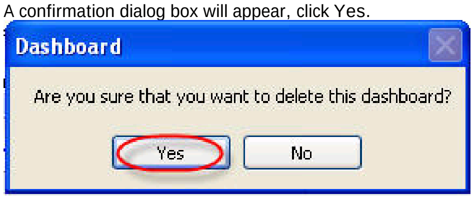
Deleting Dasboards

To delete a TopLine Dash dashboard:

1. Right Click on the dashboard tab and select Delete.



2. A confirmation dialog box will appear, click Yes.



3. TopLine Dash dashboard will be deleted.

NOTE: If the currently displayed dashboard is deleted, a blank dashboard is displayed.

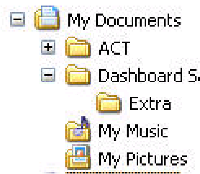
See also

Dash Query Designer
Renaming Dashboards
Protecting Dashboards
Dashboard Sub Folders
Custom Relative Dates
Copying Panels
Moving Panels
Printing to PDF
Printing to Excel
Update Fields

Home > Advanced Functions > Dashboard Sub Folders

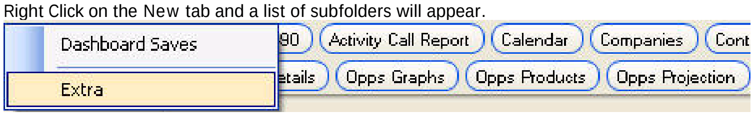
Dashboard Sub Folders

Folders can be created under the default Dashboard Saves folder to help organize the dashboards. By default, TopLine Dash comes with an Extra folder underneath the Dashboard Saves folder.

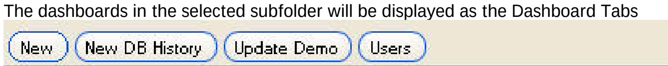


To access these dashboard:

1. Right Click on the New tab and a list of subfolders will appear.



2. Select the desired subfolder.
3. The dashboards in the selected subfolder will be displayed as the Dashboard Tabs



See also

Dash Query Designer
Renaming Dashboards
Protecting Dashboards
Deleting Dasboards
Custom Relative Dates
Copying Panels
Moving Panels
Printing to PDF
Printing to Excel
Update Fields

Home > Advanced Functions > Custom Relative Dates

Custom Relative Dates

TopLine Dash allows you to add or subtract any number of days from any of the relative date keywords. Anytime in TopLine Dash you see a drop down with an option to select relative dates, simply add a plus or - sign and then a number. For example, Start of Week - 7. This will return last week Sunday because it will go to the start of this week and then subtract 7 days from that date. This technique works in any location where a date is filled in. These relative dates (with offsets) even work with Contact/Company/Opportunity queries!

See also

Dash Query Designer
Renaming Dashboards
Protecting Dashboards
Deleting Dasboards
Dashboard Sub Folders
Copying Panels
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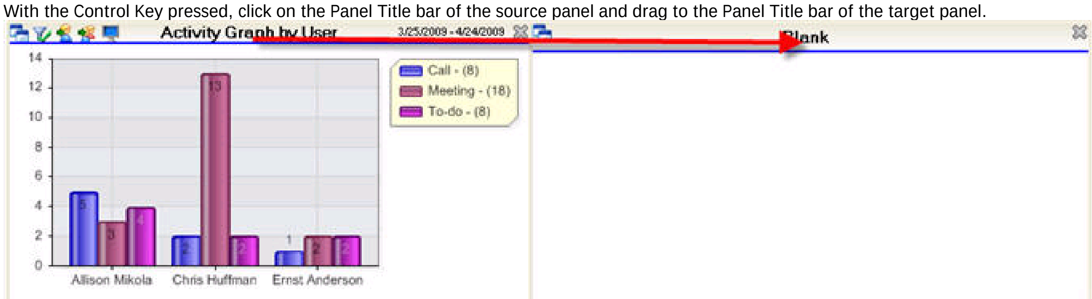
Update Fields

Home > Advanced Functions > Copying Panels

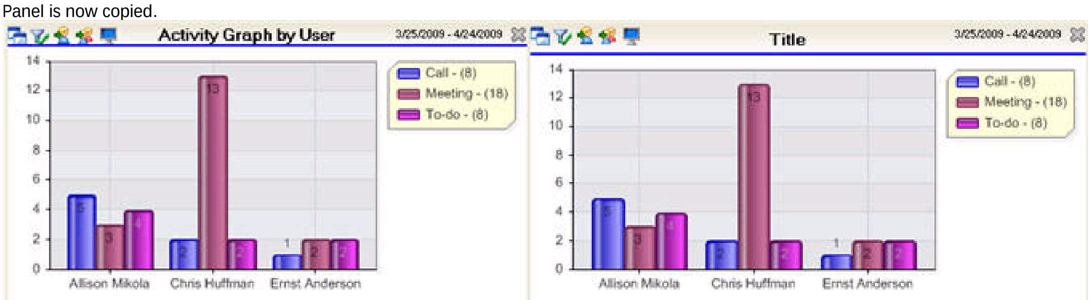
Copying Panels

TopLine Dash panels can be copied around the dashboard once they have been created to maintain their settings. This technique is extremely useful when creating a dashboard which has both a List View and Graph View of the same data. To copy a Dash panel:

1. Create a blank panel (See Rows and Columns)
2. With the Control Key pressed, click on the Panel Title bar of the source panel and drag to the Panel Title bar of the target panel.



3. Panel is now copied.



See also

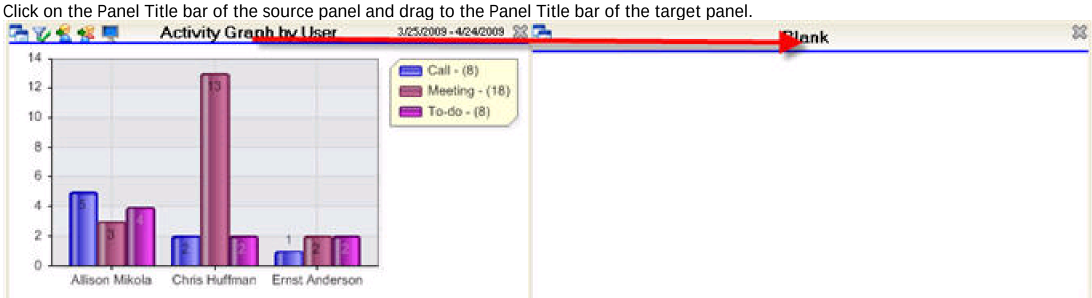
Dash Query Designer
Renaming Dashboards
Protecting Dashboards
Deleting Dasboards
Dashboard Sub Folders
Custom Relative Dates
Moving Panels
Printing to PDF
Printing to Excel
Update Fields

Home > Advanced Functions > Moving Panels

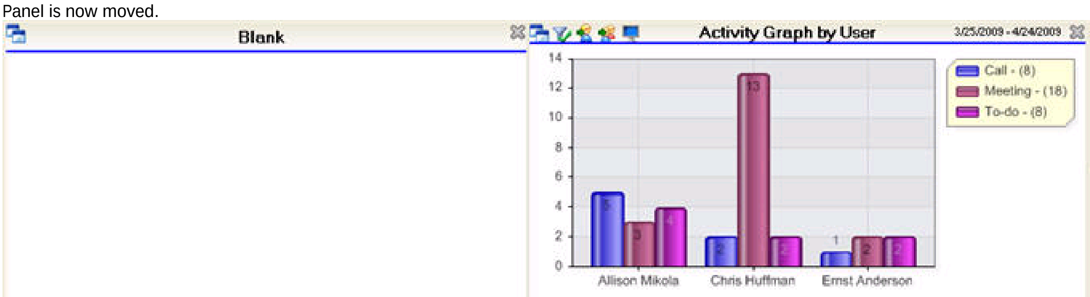
Moving Panels

TopLine Dash panels can be moved around the dashboard once they have been created. To move a Dash panel:

1. Create a blank panel (See Rows and Columns)
2. Click on the Panel Title bar of the source panel and drag to the Panel Title bar of the target panel.



3. Panel is now moved.



See also

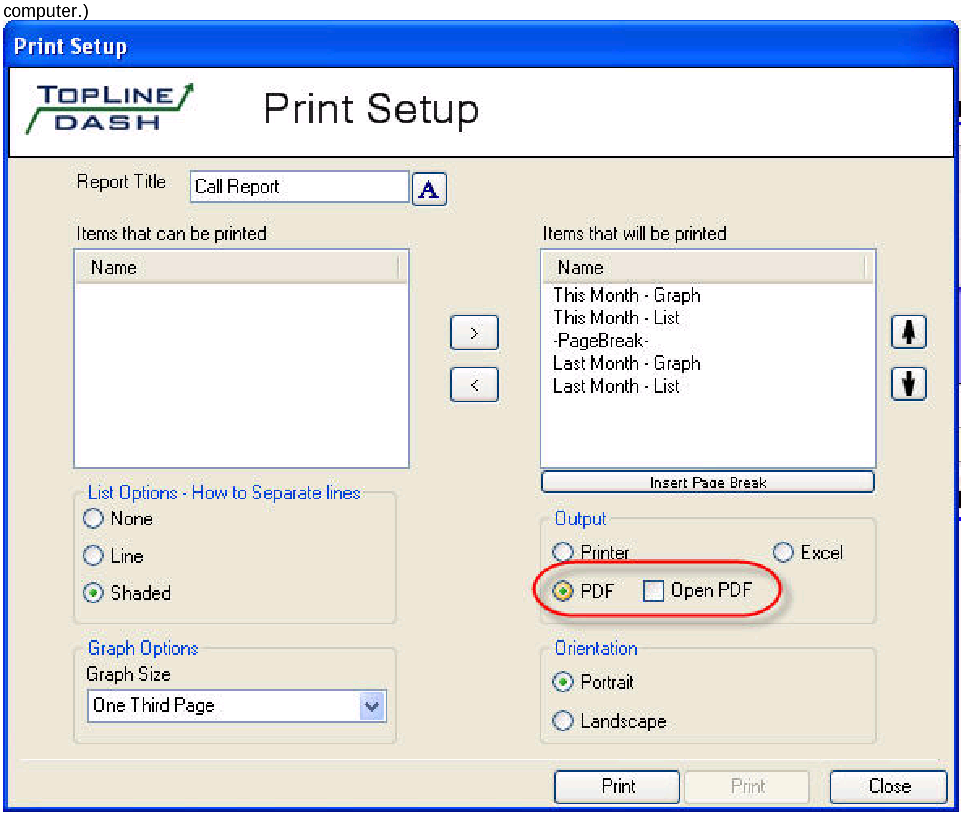
Dash Query Designer
Renaming Dashboards
Protecting Dashboards
Deleting Dasboards
Dashboard Sub Folders
Custom Relative Dates
Copying Panels
Printing to PDF
Printing to Excel
Update Fields

Home > Advanced Functions > Printing to PDF

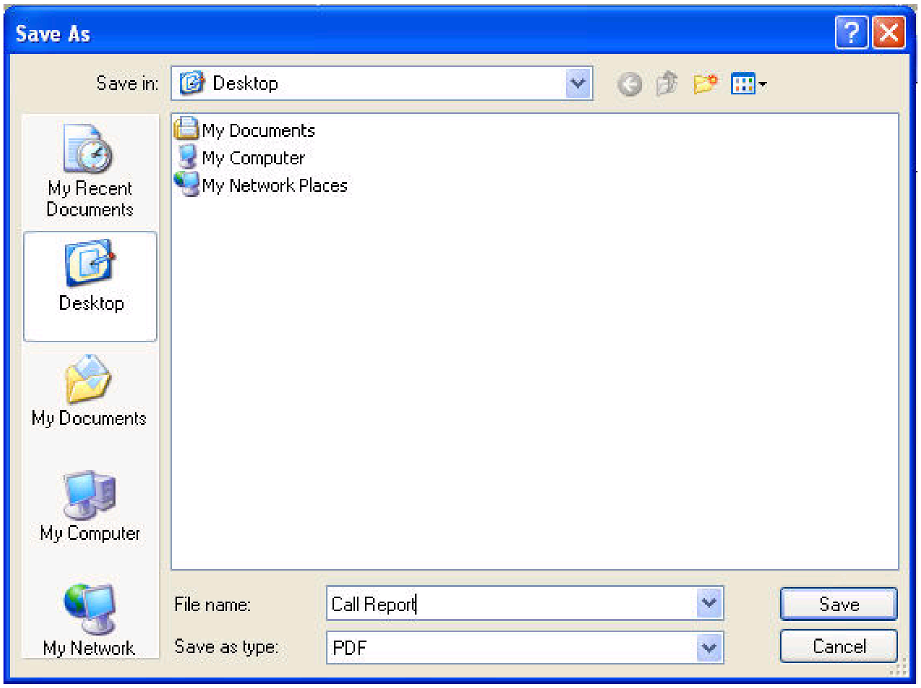
Printing to PDF

TopLine Dash includes a PDF generator so PDF files of dashboards can be created without Adobe Acrobat or other software. To create a PDF file of a dashboard:

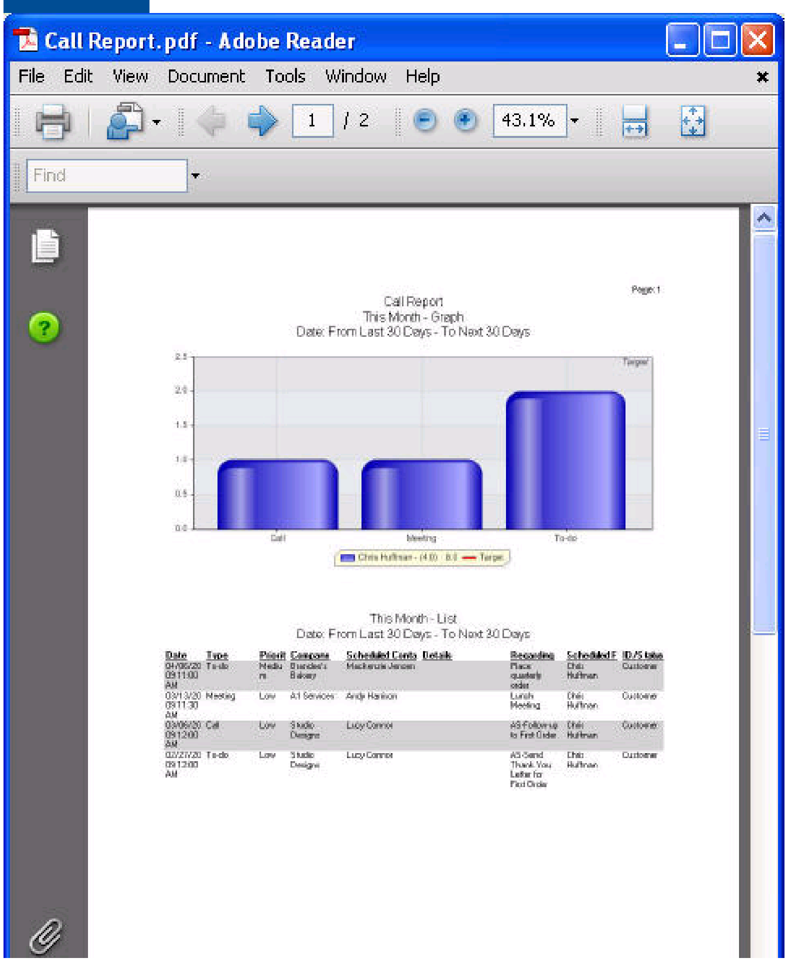
1. Press the Print button
2. Select PDF as Output. Check Open PDF to view the file after creation. (NOTE: Viewing a PDF requires that Acrobat Reader be installed on the computer.)



3. Select a location for the PDF file and give the file a name.



4. The PDF of the dashboard is created.



See also

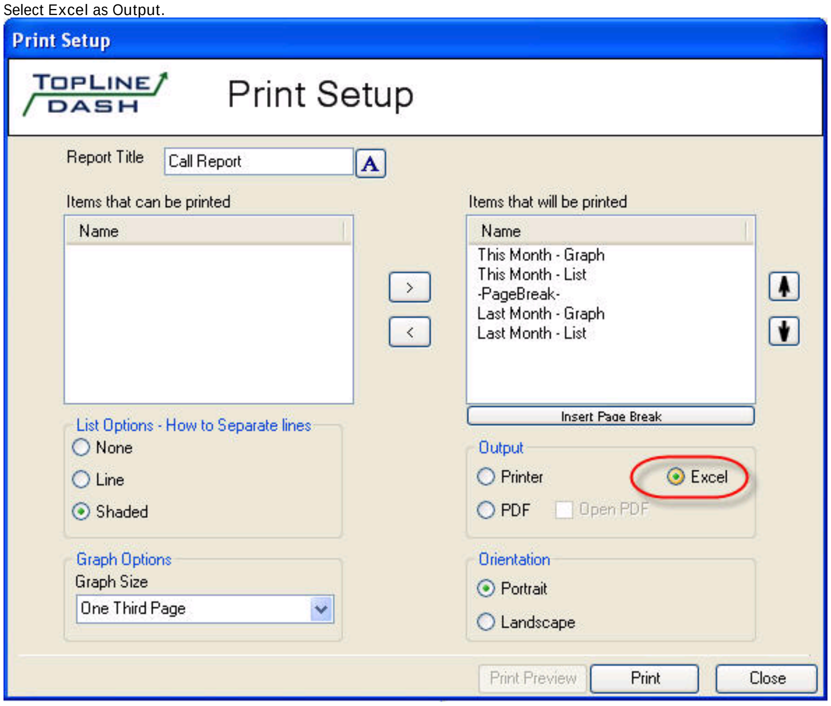
Dash Query Designer
Renaming Dashboards
Protecting Dashboards
Deleting Dasboards
Dashboard Sub Folders
Custom Relative Dates
Copying Panels
Moving Panels
Printing to Excel
Update Fields

Home > Advanced Functions > Printing to Excel

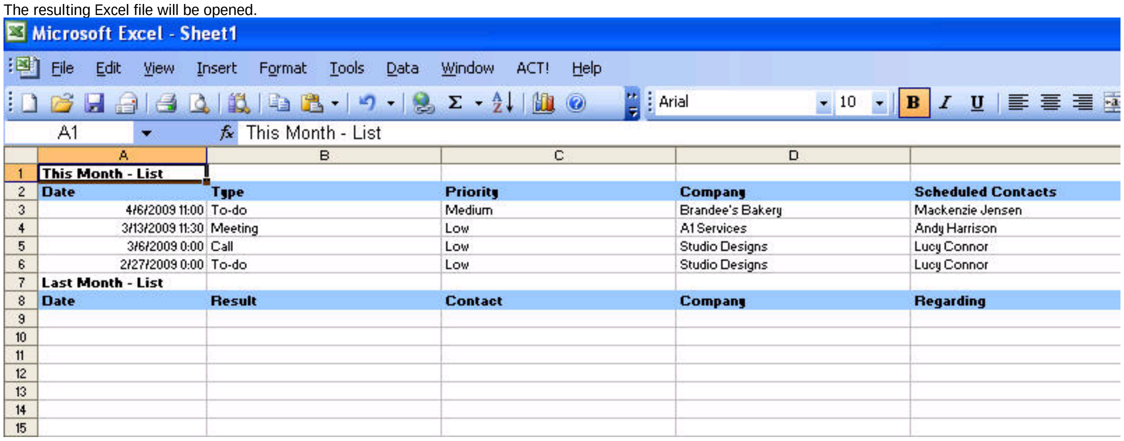
Printing to Excel

TopLine Dash can combine the List Views in a dashboard to one Excel file. Graphs are not included in the Excel file. (NOTE: Printing to Excel requires that Microsoft Excel be installed on the computer, not the Microsoft Excel Viewer. TopLine Dash supports the same versions of Office as ACT!)

1. Press the Print button
2. Select Excel as Output.



3. The resulting Excel file will be opened.



See also

Dash Query Designer
Renaming Dashboards
Protecting Dashboards
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Dashboard Sub Folders
Custom Relative Dates
Copying Panels
Moving Panels
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Update Fields

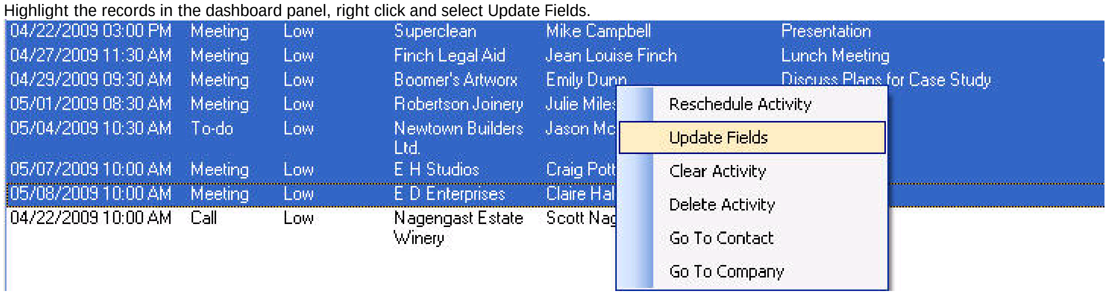
Home > Advanced Functions > Update Fields

Update Fields

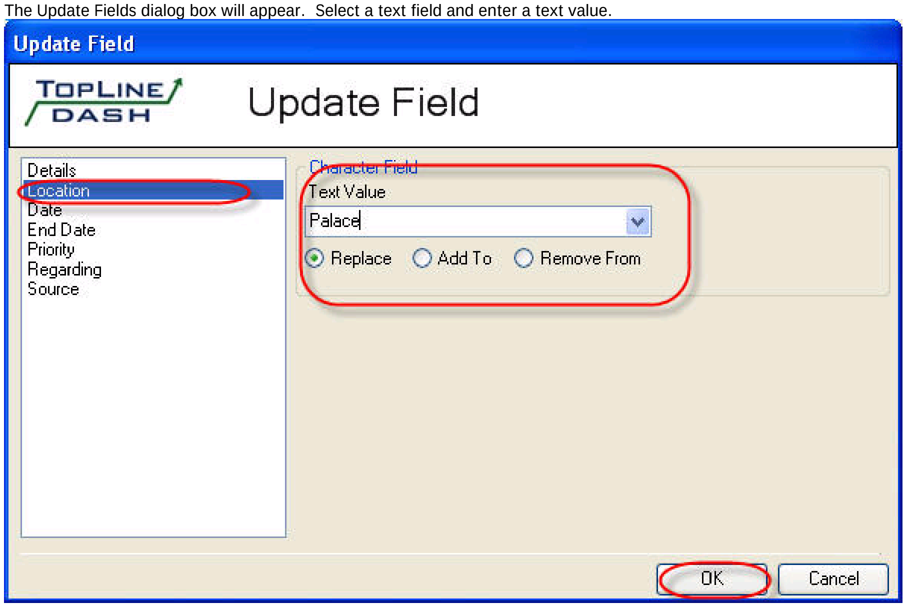
Selected panels in TopLine Dash allow fields in the highlighted rows to be updated interactively. Date fields can be adjusted by a relative number of days or set to a new fixed date, while text fields can have phrases, be removed, replaced or appended.

Updating Text Fields

1. Highlight the records in the dashboard panel, right click and select Update Fields.



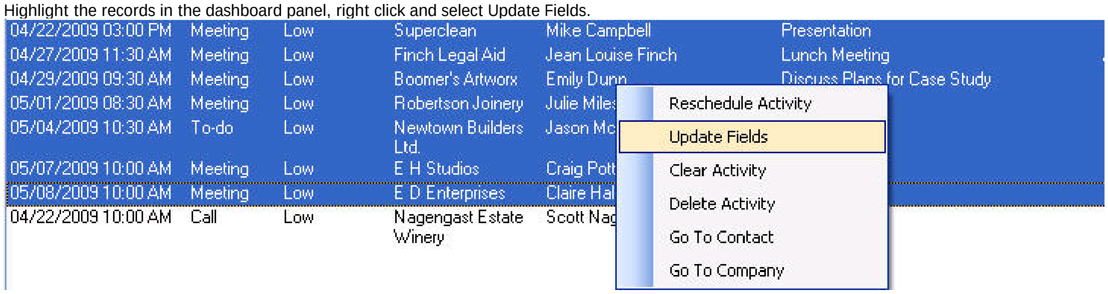
2. The Update Fields dialog box will appear. Select a text field and enter a text value.



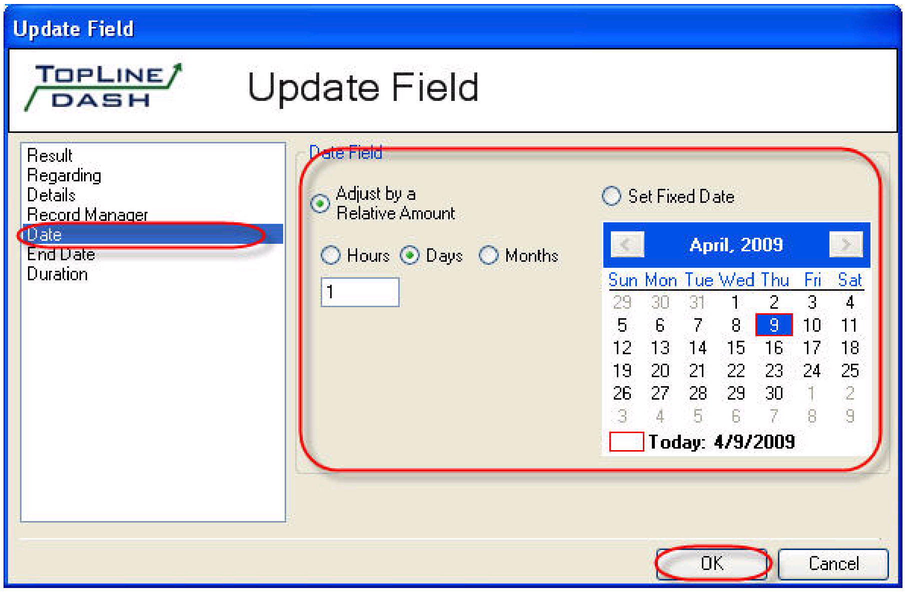
3. Select the appropriate function:
   1. Replace: The entire contents of the field will be replaced with Text Value. (i.e. Location = "Palace")
   2. Add To: The text value is appended to the field (i.e. "Garden State" becomes "Garden State Palace")
   3. Remove From: If the text value is present in the field, it is deleted. (i.e. "Palace of the Hills" becomes "of the Hills")
4. Click OK to perform the update.

Updating Date Fields

1. Highlight the records in the dashboard panel, right click and select Update Fields.



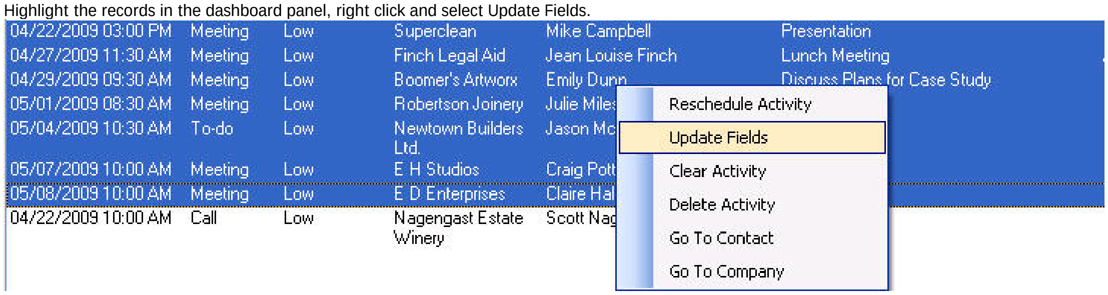
2. The Update Fields dialog box will appear. Select a Date field.



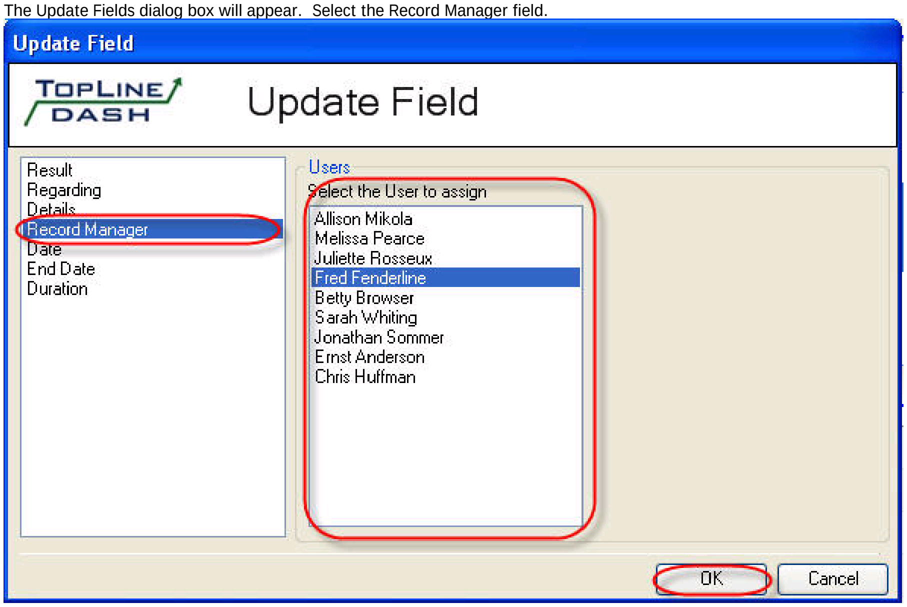
3. Select the appropriate function:
   1. Adjust by Relative Amount: The existing date is adjusted by selected hours, days or months. (i.e. Amount = 7 days, 4/4/2009 becomes 4/11/2009)
   2. Set Fixed Date: The existing date field is replaced by selected date.
4. Click OK to perform the update.

Updating Record Managers

1. Highlight the records in the dashboard panel, right click and select Update Fields.



2. The Update Fields dialog box will appear. Select the Record Manager field.



3. Select the new Record Manager from the drop down.
4. Click OK to perform the update.

See also

Dash Query Designer
Renaming Dashboards
Protecting Dashboards
Deleting Dasboards
Dashboard Sub Folders
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Copying Panels
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Printing to PDF
Printing to Excel

Home > Tutorials

Articles in this section

Simple Single Panel Dash

Complex Multi-Panel Dash

See also

Welcome
Installation
Dashboard Elements
Dashboard Panels
Advanced Functions
Dashboard Editions
FAQ

Simple Single Panel Dash

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

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

See also

Complex Multi-Panel Dash

Complex Multi-Panel Dash

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

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

See also

Simple Single Panel Dash

Dashbord Editions

Feature	Server Suite	Dash Alerts	Dash Manager	Designer Plus	Dash Personal
Automated alerts based on activities, opportunities, histories, sync and backup	✓	✓			
Automated dashboard reporting	✓	✓			
Automated dashboard reporting with custom tables	✓		✓		1 user
View all custom tables	✓			✓	
View all active ACT! users data including	✓	✓	✓	✓	✓
Multiple panels per dashboard	✓	✓	✓	✓	✓
Report capability	✓	✓	✓	✓	✓
Unlimited views	✓	✓	✓	✓	✓
Free upgrade from previous versions	✓	✓	✓	✓	✓
Unlimited dashboards	✓	✓	✓	✓	✓

See also

http://store.toplineresults.com

Home > FAQ

This FAQ section attempts to answer the most frequently asked question about TopLine Dash usage and installation. Up to date tips and tricks are also available at the TopLine Add-on Blog @ http:// blog.toplineresults.com

Articles in this section

General FAQ

Installation FAQ

See also

Welcome
Installation
Dashboard Elements
Dashboard Panels
Advanced Functions
Tutorials
Dashboard Editions

Home > FAQ > General FAQ

General FAQ

1. I need to uninstall the Dashboard completely. How do I do that?

a. Make sure that ACT! is closed. It may be necessary to reboot your computer in order to fully release the locks on all the files. If you encounter a problem uninstalling, reboot the computer and try again.

b. Click Start->Run

c. Type:

regsvr32 /u "C:\Program Files\TopLine Results\TopLine Dash\PDFCreatorPilot2.DLL"

exactly as you see it above. Be sure to include the quotation marks.

d. Open Control Panel

e. Open Add/Remove Programs

f. Select TopLine Dash and click on the Remove button.

g. Close the Add/Remove Programs window and close Control Panel.

h. Open My Computer and navigate to C:\Program Files\TopLine Results

i. Delete the folder called TopLine Dash

j. Navigate to C:\Program Files\ACT\ACT For Windows\Plugins

k. Delete the file called TLDLoader.dll.

2. TopLine Dash doesn't show up in the ACT! toolbar.

There could be several reasons why this is happening.

a. First, close ACT! and open it again. If the dashboard icon still does not show up on the toolbar, then move on to the next step.

b. Remove your dependentdlls.xml file. This is located in C:\Documents and Settings\Admin\Application Data\ACT\ACT For Windows folder. If the dashboard icon

still does not show up on the toolbar, then move on to the next step.

c. Reinstall the dashboard.

i. From Add/Remove Programs in Control Panel, remove the dashboard.

ii. Delete the TopLine Dash folder. By default, the folder is located in C:\Program Files\TopLine Results\TopLine Dash.

iii. Reinstall the dashboard.

3. I encountered an error regarding a timeout when trying to load a history list, note list, or any other list with a large amount of data.

a. Click on Start->Run

b. Type ACT8Diag and click OK.

c. If you get a disclaimer, click OK. Otherwise, move on to the next step.

d. Click on the tools menu and select Adjust ACT! Timeout Values.

e. Change the Value from 30 seconds to 300 seconds or higher.

f. Click OK.

g. Close the ACT8Diag utility.

4. I am installing the Dashboard in a Citrix environment and am getting an error when trying to start ACT!.

This is most likely a registry permission issue. Make sure that all users have full access to the HKLM\Software\ACT registry key, and all sub keys.

a. Click Start->Run

b. Type Regedit and click OK.

c. Go to HKLM\Software\ACT and right click on ACT and select Permissions.

d. Talk to your system administrator for more information about user's and group's permissions.

e. Click on the Advanced button.

f. Make sure that there is a checkmark next to “Replace permission entries on all child...”

g. Click OK.

h. Click OK.

5. I am not seeing information in the History List, Note List or History Graph.

a. Check all filter settings.

i. Make sure that the appropriate users are selected from the Users button at the top.

ii. Make sure that you have an appropriate date range selected.

iii. Make sure that you have appropriate history types selected.

b. The dashboard may be working and taking a long time to gather this information.

i. Press CTRL ALT DEL.

ii. Click on the Task Manager button.

iii. Click on the Performance tab.

iv. Look at the CPU gauge. If it is stuck at 100%, then the dashboard is probably still processing the query. Wait until it completes.

c. The AllContacts group may be missing or corrupt.

The dashboard creates a group in your database called AllContacts. This group must contain every contact in your database. This is where the dashboard retrieves histories. If this group does not contain all of the contacts in your database, then you must either:

i. Fix the group manually by setting criteria for the group that every contact will meet.

I.e.: Create Date contains data

ii. Delete the group and create it manually. Use the criteria above.

iii. Delete the group and let the dashboard attempt to create it for you. Delete the dashboard, close ACT!, then open ACT!

See also

Installation FAQ

Installation FAQ

1. Do I need to have a license of TopLne Dash for every user? You need license for each user who want to access TopLine Dash
2. Do I have to uninstall TopLine Dash in order to upgrade? You can but you do not always have to. In version 7.5 or higher you can use go to Start and Update TopLine directly across the internet, you will need to have ACT! closed.
3. Do I have to pay for an upgrade? Upgrades of TopLine Dash are free from ACT! 2005 to ACT! 2010
4. How often do I need to update? Update your software only as needed, verify that you use the correct version.
5. Are all the different version of TopLine Dash similar? No, every version from version 3 to version 7.6 has additional features, you may need to install version 3 because you have version ACT! 2005, and version 4 because you have verion ACT! 2006. If you have ACT! 2007 you can use version 7.6

See also

System Requirements

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TopLineDash