

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



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 lookups 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, todos, 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	V	
View calendars by day, week or month	 ✓ 	
Select users' calendar	 ✓ 	
Schedule or reschedule within the calendar	 ✓ 	

Opportunity Dashboard					
Choose fields from the opportunity table	 Image: A start of the start of	 ✓ 			
Filter opportunities by process, stage, status, users	 Image: A start of the start of	 ✓ 			
Filter opportunities by close date, open date and create date	 Image: A start of the start of				
Filter opportunities by selected group or query	 Image: A start of the start of				
Create opportunity queries	 Image: A start of the start of				
View opportunity totals in lists	 Image: A start of the start of				
Choose opportunity fields and contact fields side-by-side	 Image: A start of the start of				
Choose opportunity fields and last history side-by-side	 Image: A start of the start of				
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	v				
Product Dashboard	•				
Graph or list views by products	~				
View product opportunity totals	Ż				
Highlight any product in order to preview the contact layout	Ż				
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					
Go to contacts from Note list					
History Dashboard					
History Dashboard					
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	~	~			
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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 Nerformance View rontact lists Create contact query lists Graph all your queries by any fields (e.g. ID/Status, Cities, Referred by etc.)	> >				
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 History Key Performance Export KPIs to MS-Excel View contact lists Create contact query lists Graph all your queries by any fields (e.g. ID/Status, Cities, Referred by etc.) Company lists					
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 types, dates or any fields View history types, dates or any fields View history types, dates or any fields 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 I ndicator Dashboard Opportunity Key Performance Activity Key Performance History KPIs to MS-Excel Contact and Company Dashboard View contact lists Create contact query lists Graph all your queries by any fields (e.g. 1D/Status, Cities, Referred by etc.) Company lists Total numeric and currency fields Export contact query list to MS-Excel	> >				

See also

Features

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!







Obtaining Updates



See also

Welcome Dashboard Elements Dashboard Panels Advanced Functions Tutorials Dashboard Editions FAQ

Home > Installation > System Requirements

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 <u>http://www.toplineresults.com/products/downloads.htm</u> 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 Activation 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. <u>Confirm</u> 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

2.

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.

TopLine Activation				
TOPLINE/ TopLine Activation				
Welcome to the TopLine Activation Wizard. Activation allows TopLine Results to keep tabs on our product in an effort to reduce software piracy. You should have received a serial number via email when you purchased this software. This wizard will walk you through the steps required for you to get your product activated. If you have not yet purchased this software, then you may use this software in Trial Mode for a certain amount of time. You have 22 days left in your trial.				
Close << Back Next >> Finish				
ype the serial number into the field labeled Serial Number.				
TopLine Activation				
TopLine Activation				
Type your serial number below.				
Serial Number cda				
If you do not want to activate over the internet, click on the Activate Manually button. Otherwise, click Next to continue.				
Close << Back Next>>> Finish				

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.

TopLine Activa	ation	
TOPLIN / DASH	TopLine Activation	
Company Name	CH TechONE	
Name	Chris Huffman	
Address 1	13 East 54th St.	
Address 2	Suite 300	
City	New York	
State	NY	
Zip	10008	
Phone	(212) 555-2485	
Email Address	Chris@CHTechOne.com	
TOPLIN	TopLine Activation	
Type you Serial Num	I r serial number below. Iber cda	
If you do not w Activate Manu	uality activate over the internet, click on the Activate Manually button. Otherwise, click Next to continue.	
	Close << Back Next >> Finish	1

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.

opLine Acti	vation
DAS	TopLine Activation
A connection like to try ag	n could not be made to the activation service over the internet. If you would ain, click the Back button. Otherwise, follow the steps below.
1. Verify tha	t your serial number was typed in correctly. If it was not, please click the Back button and try again
(Box A	I cda4
2. You may	be asked for the text in the box below.
(Box B	(Case Sensitive)
 Click here Type the 	to get your unlock code by going to our webpage. If you do not have internet access, you can call TopLine Results at 1-800-880-1960. unlock code that you are given into the box below.
(Box C	
<u> </u>	
	Close << Back Next >> Finish
nlock code ca	n be generated without calling TopLine Results by clicking on the Unlock Code by Webpage link in Ste
pLine Acti	vation
TOPLIN	VE/ Tapling Activation
DASI	
A connection	could not be made to the activation service over the internet. If you would
like to try aga	in, click the Back button. Utherwise, follow the steps below.
 Verify that (D A) 	your serial number was typed in correctly. If it was not, please click the Back button and try again
(Box A)	cda4
2. You may t	e asked for the text in the box below.
(Box B)	vpc (Case Sensitive)
3. Click here	to get your unlock code by going to our webpage. If you do not have internet access,
	you can call Topl ine Results at 1-800-880-1960
	you can can repend results at resolute resolute
4. Type the	inlock code that you are given into the box below.
4. Type the ((Box C)	Inlock code that you are given into the box below.
4. Type the ((Box C)	Inlock code that you are given into the box below.
4. Type the ((Box C)	Inlock code that you are given into the box below.
4. Type the (Box C)	Inlock code that you are given into the box below.

6.

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

TopLine Results Add-on Activation

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

Company *	CHTech One
Name *	Chris Huffman
Address 1*	13 East 54th St
Address 2	Suite 300
City *	New York
State *	NY
Zip *	10008
Phone *	212 555 2485
Email*	chris@chtechone.com
0	Get Unlock Code

The unlock code will appear on the next page.

TopLine Results Add-on Activation

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



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

TopLine Activation	
TopLine Activation	
A connection could not be made to the activation service over the internet. If you would like to try again, click the Back button. Otherwise, follow the steps below.	
1. Verify that your serial number was typed in correctly. If it was not, please click the Back button and try ag	ain.
(Box A) cda4	
2. You may be asked for the text in the box below.	
(Box B) vpc (Case Sensitive)	
 Click <u>here</u> to get your unlock code by going to our webpage. If you do not have internet access, you can call TopLine Results at 1-800-880-1960. 	
Type the unlock code that you are given into the box below.	
(Box C) 698-50	
Close << Back Next >>> Finis	h

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



See also

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

Obtaining Updates

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

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.

ЧШ	Manager	🛅 TopLine Results	🕨 🐠 Designer for Web Licens	e Manager
-	Designer for Web Lic Manager	📕 Adobe Reader 9	🛕 TopLine Alerts	
	Managei	🥖 Internet Explorer	TopLine Update	\supset
	All Programs 🌔	🇐 Outlook Express	\	/olumes:
		Log Off 🚺 Turn Off (Computer	
🥂 S	tart 🛛 🏾 🖉	i 🌔 🖂 🥵		

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

	TopLine Update Get the lastest version of TopLine Products	
Check Designer		2
For Updates		
Check Dashboard For Updates		

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

Check Designer For Updates Check Dashboard For Updates		
Jodates are available. Click Update to install		
Files That Will Be Updated		
FileName	Current Version	New Version
Dashboard.dll ACTPanels.dll ACTPanels12.dll	7.6.0.4 7.6.0.4 7.6.0.4	7.6.0.5 7.6.0.5 7.6.0.5

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.

	opLine Update
	TopLine Update Get the lastest version of TopLine Products
6	Retrieving List Of Files For Designer
	Check Designer r Uddates
	Check Designer r Updates

See also

System Requirements Obtaining Installation Program Running Installation Activation Launching TopLine Dash 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



See also

Welcome Installation Dashboard Panels Advanced Functions Tutorials Dashboard Editions FAQ

```
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 T	opLine Dash Title.
	🔇 Back 🌔	🖁 TopLine Dash
	Contacts	🔽 📗 🖬 - 🥪 🎭 💁 -
	Groups	Activity Graph by User
2	Enter a new title Cli	ck OK
2.	Title	
	Give this Dashboa	rd a title
	Current Activities	
3.	TopLine Dash Title is	now changed.
	👌 Back 🕞	🚨 TopLine Dash
	Contacts Groups	Current Activities Activity Graph by User

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.

 New
 Activity
 Activity
 Call Report
 Callendar
 Companies
 Contacts
 History
 Story
 KPI
 Notes
 Opportunities

 Opps
 30:60:90
 Opps
 Deps
 Opps
 O

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.
	Panel Wizard
	DASH Panel Wizard
	Welcome to the Panel Wizard This wizard will assist you with creating or modifying a panel for TopLine Dash. Most panels consist of two elements - a data component and a display style.
	Data Component
	This is the data source for your panel. Select the option that will return the data that you want. The data
	component is where you will filter your data so that you only get the data that you want.
	Display Style
	This is how you want to see the data that you selected. The most common selections are a List, Graph or KPI. Not all display styles are available for all data components.
	Show Welcome Screen When Panel Wizard Opens
	<< Prev Next >>>
	OK. Cancel

3. Select your Dashboard Panel, click Next.

Panel Wizard	
TOPLINE /	Panel Wizard
The first step in creating a m relect your data source Activity Company Company Quesy Contacts By Group Contact By Group Contact Query Custom Sub Entity Group Query History Note Opportunity Opportunity Query	ew panel is to select what type of data you want to use.
Product Synchronization User Officer/Contact Details/	Calendari

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

卍	<u>PLINE</u> A	ctivit	y Preference	S
From	Last 30 Days		Activity Types	Priority
To SP SP SP Regard where below. colon.	Next 30 Days ow Cleared Activities now Open Activities now Both ling Filter: Show only the ac the regarding field is equal Separate each item with a Click here for more details	tivities to the items semi-	Call Call Marketing Call Personal Activity Vacation	V High Wedum-High Wedum-Low Low
			Select All Clear Al	I Select All Clear All
Group F	ittering: w Activities for all Contacts	within the s	elected Group	

5. Configure the panel's <u>Display Properties</u>, click Next.

TOPLINE	Panel Wizar	d	
Vext you need to sele	ct how you want the data displayed on the Available Columns	he screen. Selected Columns	
O KPI	Activity	Column	Set Font
⊙ List	Company	Activity - Type Activity - Date	
	Show Grid Lines	*	1
		CC Prev	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.



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.

Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
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 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.
 Click on the Save icon.

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.



3. The dashboard file is saved.

See also

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

Print Icon The Print Icon The Print Dialog will appear. The TopLine Print			
This Print Icon prints the TopLine Dash to the printer, a PDF file, or an Excel spreadsheet. 1. Click on the Print Icon. Click on the Print Icon. The TopLine Print Dalog will appear. Print Setup Print Setup Report Title Call Report Report Title	Prir	nt Icon	
 1. Click on the Print icon. I to to be print on the print of the print of	This Prir	It loon prints the TopLine Dash to the printer, a <u>PDF file</u> , or an Exce	el spreadsheet.
A result of the second seco	1.	Click on the Print icon.	
2. The TopLine Print Dialog will appear. Print Setup Items that can be printed Name Items that can be printed Name Joint Scaph This Month - Graph This Month - Graph This Month - Graph This Month - Carph Items that can be printed Name Joint Component Items that will be printed Name Items that will be printed Name Joint Component Component Items that will be printed Name Distribution PageBreak: Last Month - Graph Last Month - List Dutput Printer Excel Output Orientation Graph Options Graph Component Graph Size Print Preview Print Print Close		🛛 🐻 🔚 🖌 🥪 📓 🗯 🖉	🖸 🕕 🛕
Print Setup Print Setup Report Title Call Report Items that can be printed Items that will be printed Name J Items that can be printed Items that will be printed Name J Items that can be printed Items that will be printed Name J Items that can be printed Items that will be printed Name J Items that can be printed Items that will be printed Items that can be printed Items that will be printed Items that can be printed Items that will be printed Items that can be printed Items that will be printed Items that can be printed Items that will be printed Items that can be printed Items that will be printed Items that can be printed Items that will be printed Items that will be printed Items that will be printed Items that will be printed Items that will be printed Items that will be printed Items that will be printed Items that will be printed Items that will be printed Items that will be printed Items that will be printed <tr< td=""><td>2.</td><td>The TopLine Print Dialog will appear.</td><td></td></tr<>	2.	The TopLine Print Dialog will appear.	
Print Setup Report Title Call Report Items that can be printed Items that will be printed Name > Name > This Month - List PageBreak- Last Month - Graph Last Month - List PageBreak- Last Month - List List Options - How to Separate lines Output List Options - How to Separate lines Output Dirent Page Output PDF Open PDF Graph Size Orientation One Third Page Orientation Pint Preview Print		Print Setup	
Report Title Call Report Items that can be printed Name Name Name Name <		Торціле/ Print Setup	
Items that can be printed Name Name This Month - Graph This Month - List -PageBreak List Options - How to Separate lines None Line Shaded Graph Options Graph Options Graph Options Graph Size One Third Page Print Preview Print Preview Print Preview		Report Title Call Report	
Name Name This Month - Graph This Month - Graph This Month - List PageBreak- Last Month - List None Line Shaded Output Output Pinter Excel PDF Open PDF Graph Size One Third Page Pint Preview Print Close		lteme that can be printed	Demo that will be printed
Name Inite Image: Instance This Month - Graph This Month - List PageBreak: Last Month - Graph Last Month - Graph List Options - How to Separate lines Insert Page Break None Line Line Printer Shaded PDF Open PDF Open PDF Graph Size Orientation One Third Page Landscape Print Preview Print Close Print		Name	Name
List Options - How to Separate lines Insert Pade Break None Output Line Printer Shaded PDF Graph Options Orientation Graph Size Portrait One Third Page Landscape Print Preview Print Close Print		> <	This Month - Graph This Month - List -PageBreak- Last Month - Graph Last Month - List
List Options - How to Separate lines None Line Shaded Graph Options Graph Size One Third Page Print Preview Print Close			Incert Page Preak
 Choice Choice		List Options - How to Separate lines	
Shaded Graph Options Graph Size One Third Page Print Preview Print Close			Printer O Excel
Graph Options Graph Size One Third Page Print Preview Print Close		⊙ Shaded	O PDF Open PDF
Graph Size One Third Page Portrait Landscape Print Preview Print Close		Graph Options	Orientation
One Third Page Image: Close Print Preview Print		Graph Size	 Portrait
Print Preview Print Close		One Third Page	O Landscape
			Print Preview Print Close

- 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; <u>PDF file; Excel Spreadsheet</u>.
- 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.

Print Setup		
/ DASH Print Se	etup	
Report Title Call Report Items that can be printed Name	Items that will be printed Name This Month - Graph This Month - List -PageBreak- Last Month - Graph Last Month - List	▲ ¥
List Options - How to Separate lines None Line Shaded Graph Options Graph Size One Third Page	Insert Pade Break Output O Printer PDF Open PDF Orientation O Portrait Landscape	
	Print Preview Print Close	e
Print preview Print preview Due from Land Due fr	Image: Second	
	201000 0 0 0 0 0	



New Icon Load Icon Save Icon Preferences Icon Refresh Icon Help Icon About Icon Alerts 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.	
TopLine Dash Preferences	
/ DASH TopLine D	ash Preferences
General	Startup Dashboard
Show Getting Started Wizard	Last Opened Dashboard
Saved File Location Default Saved Dashboards Location C:\Documents and Settings\Training\	Named Dashboard
	OK Cancel

- Change the following settings:

 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



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



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.



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.

Scheduled 🗸 Contacts	Regarding
nter a new title. Clic	ck OK.
Change Panel Name	
TOPLINE	Name
You can giv Current Act	e each panel a name to help describe this panel's function

3. TopLine Dash Title is now changed.

Current Activity List						
Scheduled Contacts	▼ Regarding	V				

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.
	Panel Wizard
	/ DASH Panel Wizard
	Welcome to the Panel Wizard
	This wizard will assist you with creating or modifying a panel for TopLine Dash. Most panels consist of two elements - a data component and a display style.
	Data Component
	This is the data source for your panel. Select the option that will return the data that you want. The dat
	component is where you will filter your data so that you only get the data that you want.
	Display Style
	This is how you want to see the data that you selected. The most common selections are a List, Graph o KPI. Not all display styles are available for all data components.
	Show Welcome Screen When Panel Wizard Oper
	<< Prev Next>>>
	OK Cancel

3. Select your Dashboard Panel, click Next.

Panel Wizard		
TOPLINE /	Panel Wizard	
The first step in creating a r	ew panel is to select what type of data you want to use.	
O Activity		
Company		
Company Query	The second se	
O Contacts By Group		
Contact Query		
Custom Sub Entity		
O Group Query		
O History		
O Note		
Opportunity		
Opportunity Query		
O Product		
Synchronization		
O User		
C Ather-IContact Details	(Calendar)	
	<pre> (Next >>)</pre>	
	OK	Cancel

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

卍	PLINE A	ctivity	/ Preference	es
From	Last 30 Days		Activity Types	Priority
To Sh Sh Sh Sh Regard where the below. colon.	Next 30 Days ow ow Cleared Activities ow Open Activities ow Both ing Filter: Show only the ac he regarding field is equal Separate each item with a Click here for more details	tivities to the items semi-	Call Call Geeing Todo Arketing Call Personal Activity Vacation	V High Medium-High Medium Medium-Low V Low
-			Select All Clear	All Select All Clear All
Group F	itering: w Activities for all Contacts	within the se	lected Group	OK Cancel

5. Configure the panel's <u>Display Properties</u>, click Next.

DASH	Panel Wizar	d	
Next you need to sele	ct how you want the data displayed on th Available Columns	he screen. Selected Columns	
O KPI		Column	Set Font
⊙ List	Company	Activity - Type Activity - Date	
	Show Grid Lines		1
	and the second second	C / Prev	Next SS

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.



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

Activit	y Preferences			
	PLINE/ ASH	Activity	y Preference	es
From	Today		Activity Types	Priority
То	Next 30 Days		Call Meeting	✓ High Medium-High
Sh Sh Sh Regard where t below. colon.	ow Cleared Activities ow Open Activities ow Both ing Filter: Show only he regarding field is Separate each item Click here for more d	the activities equal to the items with a semi- etails	 ✓ To-do Marketing Call Personal Activity Vacation 	✓ Medium ☐ Medium-Low ✔ Low
			Select All Clear A	All Select All Clear All
Group F	iltering: w Activities for all Co	ntacts within the se	elected Group	
				OK Cancel

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:

	25	Activi	ity Graph by	User	4/6/2009	9-5/8/2009 🞇	0 4 2 2	B.	1	Activity KPI	3		4/8/200	19-5/8/2009
20 1				_				# Call	1	# Meeting		# To-do		U.
18 - 16 - 14 - 12 - 10 - 8 - 6 - 4 - 2 - 0 - Alie	ton Mikola	Christ	19 Tuffman Ernst	2 2 Anderson	Call	I - (8) eting - (24) do - (4)	Alison Mikola Chris Huffman Ernst Anderson Melissa Pearce Sarah Whiting	4 2 1 0 1		4 16 3 1 0		2 0 2 0 0		
् 🗖 🖁	8 9.					Current	Activity List			1.		(26)	- 4/8/200	9 - 5/6/2009
ate 🗸 🔽	Type V	Priori 🔽	Company	▼ Scheduk Contacts	ed ⊽	Current. Regarding	Activity List		V	Scheduled For	V	(96) ID/Status	- 4/8/200 V	9 - 5/8/2009 Referred B
ate 🛛 🔽	Type ♥ Meeting	Priori 🗸 V	Company CH TechONE	V Schedul Contacts Juliette F	ed 🛛 🗸 Rosseux	Current Regarding Weekly Finar	Activity List		V	Scheduled For Chris Hulfman	V	(96) ID/Status Employee	-4/8/200	9 - 5/6/2009 Referred B
ate 7	Type V Meeting Meeting	Priori V IV Low Low	Company CH TechONE CH TechONE	Scheduk Contacts Juliette F Ernst An	ed V Rosseux derson	Current Regarding Weekly Finar Expense and	Activity List		V	Scheduled For Chris Huffman Ernst Anderson	v	(96) ID/Status Employee Employee	-4/8/200	9-5/8/2009 Referred B
Pate V 4/10/2009. 4/10/2009. 4/10/2009.	Type V Meeting Meeting To-do	Priori V Iv Low Low	Company CH TechONE CH TechONE CH TechONE	Scheduk Contacts Juliette F Ernst An Allison M	ed v Rosseux derson likola	Current Regarding Weekly Fina Expense and Prepare Sale	Activity List nce Meeting Sales Reports s Report and Plan N	lext Week	V	Scheduled For Chris Huffman Ernst Anderson Allison Mikola	V	(96) ID/Status Employee Employee Employee	-4/8/200 V	9 - 5/8/2009 Referred B
Iale V 4/10/2009 4/10/2009 4/10/2009 4/10/2009	Type V Meeting Meeting To-do Meeting	Priori V ty Low Low Low Low	Company CH TechONE CH TechONE CH TechONE CH TechONE	V Schedul Contacts Juliette F Ernst An Allison M Mikola,C Huffman	ed v Rosseux derson likola Hris Ernst	Current A Regarding Weekly Finar Expense and Prepare Sale USA Sales M	Activity List nce Meeting Sales Reports s Report and Plan M leeting	lext Week.	V	Scheduled For Chris Huffman Ernst Anderson Allison Mikola Chris Huffman	V	(26) ID/Status Employee Employee Employee Employee	- 4/8/200 V	9 - 5/8/2009 Referred B
A/10/2009. 4/10/2009. 4/10/2009. 4/10/2009. 4/10/2009.	Type V Meeting Meeting To-do Meeting Meeting	Priori V Low Low Low Low Low Low	Company CH TechONE CH TechONE CH TechONE CH TechONE CH TechONE	Schedul Contacts Juliette F Ernst An Allison Mikola,C Hulfman Allison Mikola,C Hulfman	ed V Rosseux derson likola Ernst Hris Ernst	Current. Regarding Weekly Fina Expense and Prepare Sale USA Sales M USA Sales M	Activity List nce Meeting Sales Reports s Report and Plan M leeting	lext Week.	V	Scheduled For Chris Huffman Ernst Anderson Allison Mikola Chris Huffman Chris Huffman	V	(26) ID/Status Employee Employee Employee Employee	-4/8/200 V	9 - 5/8/2009 Referred B
Arte ▼ 4/10/2009 4/10/2009 4/10/2009 4/10/2009 4/10/2009 4/10/2009	Type V Meeting Meeting To-do Meeting Meeting	Priori V Low Low Low Low Mediu m	Company CH TechONE CH TechONE CH TechONE CH TechONE CH TechONE CH TechONE	✓ Scheduli Contacts Juliete F Ernst An Allison M Allison M Mikola;C Huffman Allison Mikola;C Huffman Allison Mikola;C Huffman Allison Mikola;C Huffman	ed V Rosseux derson likola hris Ærnst Hris Ærnst	Current, Regarding Weekly Fina Expense and Prepare Sale USA Sales M USA Sales M USA Sales M	Activity List Activity List Sales Reports s Report and Plan M leeting leeting	lext Week	V	Scheduled For Dhris Huffman Ernist Anderson Allison Mikola Chris Huffman Chris Huffman Chris Huffman	V	(26) ID/Status Employee Employee Employee Employee Employee	-4/8/200 V	9 - 5/8/2009 Referred B





KPI 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

List View

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

🗟 🔍 💭 🎖	2 🔍			Current	Activity List		(36) - 4/8/2009 - 5/8/2009			
Date 🗸 🏹	Type 🛛	Priori 🔽 ty	Company 🛛 🗸	Scheduled Contacts	▼ Regarding	V	Scheduled For	▼ ID/Status	^	
04/27/2009	Meeting	Low	Yellow Jersey Bikes	Brian David	Discuss Plans for a Case Study		Chris Huffman	Customer	-	
04/27/2009	Meeting	Low	Finch Legal Aid	Jean Louise Finch	Lunch Meeting		Allison Mikola	Prospect		
04/29/2009	Meeting	Low	Boomer's Artworx	Emily Dunn	Discuss Plans for Case Study		Chris Huffman	Prospect		
04/06/2009	Meeting	Low	Computer Trade Associations	Computer Trade Associations	Industry Trade Show		Chris Huffman	Prospect		
04/08/2009	Meeting	Low	CH TechONE	Allison Mikola	Networking Breakfast		Allison Mikola	Employee		
04/09/2009	Meeting	Low	CH TechONE	Ernst Anderson	Breakfast Networking Group		Ernst Anderson	Employee		
04/09/2009	Meeting	Low	CH TechONE	Melissa Pearce	Staff Meeting		Chris Huffman	Employee		
04/09/2009	Meeting	Low	CH TechONE	Melissa Pearce	Staff Meeting		Chris Huffman	Employee		
04/09/2009	Call	Low	Widget	Max Headlong	Confirm Appointment		Allison Mikola	Customer	~	
<									>	



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.

a 🔍 💷 💈 🚜	8		Contract Co		Activity KI	2			3/9/2009 - 5/8/2009
	# Call	# Med	sting =	To-do	#Vacation				
Allison Mikola	7	7	7		0				
Chris Huffman	2	20	2		0				
Einst Anderson	1	3	4		0				
Melissa Pearce	0	2	0		0				
Sarah Whiting	1	0	0		0				
o 🖓 🕮 💈 👪	а,				History KF	4			3/9/2009 - 4/9/2009
	# Call Comple	ted #E-m	ail Sent 🔳	Meeting Held	# Quote	# Received	Sync #Todol	Done	
Allison Mikola	0	0	0		0	0	0		
Chris Huffman	0	0	0		0	0	0		
Einst Anderson	0	0	0		0	0	0		
Melissa Pearce	0	0	0		0	0	0		
Sarah Whiting	0	0	0		0	0	0		
o 🖓 🕶 💈 👪	а,			(Opportunity	KPI			3/9/2009 -5/9/2009
	# Lost Opps	# of Opps	# Open Opps	# Won Opps	\$ Lost Opps	\$ Open Opps	\$ Won Opps	Average Sale	
Allison Mikola	1	8	7	0	\$300	\$38,500	\$0	\$0	
Chris Huffman	0	10	6	4	\$0	\$62,000	\$40,000	\$10,000	
Ernst Anderson	0	6	5	1	\$0	\$13,000	\$12,000	\$12,000	
Melissa Peace	0	0	0	0	\$0	\$0	\$0	\$0	

Display Type Propert	ies	
Display Types Graph KPI List	Available KPIs	Note: The KPIs that are shown may not be all the KPIs that are available. The KPIs that are shown reflect the data filters you have set. ex: If you have selected to only show Open Opportunities, then you will not see KPIs relating to Opportunities that are closed.

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.



Display Type Prope	rties	
Display Types Graph KPI List	Styles Styles Bar Graph Pie Graph Donut Graph Line Graph Funnel X-Axis Category Field	Help
	Group Field Activity - Type Image: Construction of the state	
	Use 3D	Close

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 <u>Dashboard</u> <u>Panels</u> 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.



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

```
Home > Dashboard Elements > Panel Toolbar > Contact Group Icon
```

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.



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



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. Activities

े 🤇 🖉 🖁 🚜 🗷				Activity I	List	6	34] - 4/8/2009 - 5/8/2009
Drag a column he	ad 🚽 🛶	010124	that column				
Date / 1	Type V	Priority	Company	V Scheduled Contacts	▼ Regarding	V Scheduled For	VID/Status
04/10/2009 01:30 PM	Meeting	Low	CH TechONE	Juliette Rosseux	Weekly Finance Meeting	Chris Huffman	Employee
04/10/2009 10:00 AM	Meeting	Low	CH TechONE	Ernst Anderson	Expense and Sales Reports	Ernst Anderson	Employee
04/10/2009 03:30 PM	To-do	Low	CH TechONE	Allison Mikola	Prepare Sales Report and Plan Next Week	Allison Mikola	Employee
34/10/2009 08:00 AM	Meeting	Low	CH TechONE	Allison Mikola;Chris Hulfman;Ernst Anderson	USA Sales Meeting	Chris Huffman	Employee
04/10/2009 08:00 AM	Meeting	Medium	CH TechONE	Allison Mikola;Chris Hulfman;Ernst Anderson	USA Sales Meeting	Chris Huffman	Employee
04/10/2009 08:00 AM	Meeting	Low	CH TechONE	Allison Mikola;Chris Hulfman,Ernst Anderson	USA Sales Meeting	Chris Huffman	Employee
04/13/2009 01:00 PM	Meeting	Low	Parsley Group	David Purkis, Will Blake	Presentation	Chris Huffman	Prospect
04/13/2009 11:30 AM	Meeting	Low	A1 Services-US Operations	Amanda Form	Lunch Meeting	Allison Mikola	Prospect
04/14/2009 11:00 AM	To-do	Low	Mears Insurance	Irene Murphy	Get the order	Einst Anderson	Prospect
04/14/2009 07:00 AM	Meeting	Low	CH TechONE	Chris Huffman	Network Breakfast	Chris Huffman	Employee
04/15/2009 02:00 PM	Meeting	Low	Harrison &	Ella Harrison	Presentation	Chris Huffman	Prospect

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

GQ 🖬 🖁 💐 🔍 🗄				Activity L	ist	04	-48,2009-5,8,2009 \$
ID/Status /							
D/Status : Customer	(6 items)	34	- 1955				
Date	V Type 1	7 Priority	♥ Company ♥	Scheduled Contacts	✓ Regarding	Scheduled For	Referred By
04/23/2009 09:30 AM	f Call	Low	International Safari	Vivian Grace	Confirm Appointment	Allison Mikola	
04/27/2009 10:30 AM	Meeting	Low	Yellow Jersey Bikes	Brian David	Discuss Plans for a Case Study	Chris Huffman	Website
04/09/2009 09:30 AM	Call	Low	Widget Corporation	Max Headlong	Confirm Appointment	Allison Mikola	
05/05/2009 09:30 AM	1 To-do	Low	Django Consulting	Dan Minnick	Prepare Quote	Alison Mikola	
05/06/2009 08:00 AM	Meeting	Low	Stevenson & Smith	Louise Harper	Prospect Call	Chris Huffman	
05/07/2009 10:00 AM	f Call	Low	Continental Energy	Herman Getter	Confirm Appointment	Allison Mikola	
ID/Status : Employee	(12 items)						
ID/Status : Employee	Friend [1 ite	em)					
E ID/Status : Prospect (14 items)						
ID/Status : ProspectA	/endor (1 ite	m					

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.

् 📫 🎖 🎎 🖳	=			Activity L	ist	P4	- 4/8/2009 - 5/8/2009
ID/Status /	~						
ID/Status : Custome Date	Type T	7 Priority	Company N	7 Scheduled Contacts	✓ Regarding	Scheduled For	Referred By
04/23/2009 09:30 A	M Call	Low	International Safari	Vivian Grace	Confirm Appointment	Allison Mikola	
04/27/2009 10:30 A	M Meeting	Low	Yellow Jersey Bikes	Brian David	Discuss Plans for a Case Study	Chris Huffman	Website
04/09/2009 09:30 A	M Call	Low	Widget Corporation	Max Headlong	Confirm Appointment	Allison Mikola	
05/05/2009 09:30 A	M To-do	Low	Django Consulting	Dan Minnick	Prepare Quote	Alison Mikola	
05/06/2009 08:00 A	M Meeting	Low	Stevenson & Smith	Louise Harper	Prospect Call	Chris Huffman	
05/07/2009 10:00 A	M Call	Low	Continental Energy	Herman Getter	Confirm Appointment	Allison Mikola	
ID/Status : Employe	e (12 items)						
ID/Status : Employe	e,Friend (1 ite	em)					
ID/Status : Prospect	(14 items)						
ID /Status - Prospect	Vander (1 8a	m					

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

Activities	Activity List	(24) - 4/8/2009	-5/8/2009 💥
ID/Status / Priority /			
ID/Status : Customer (1 item)			
ID/Status : Employee (2 items)			
Priority : Low (10 items)			
Priority : Medium (2 items)			
Date V Type V Company	▼ Scheduled Contacts ▼ Regarding	Scheduled For V Referred By	▼ Detail
04/10/2009 08:00 AM Meeting CH Tech01	E Allison Mikola,Chris USA Sales Meeting	Chris Huffman	
04/17/2009 08:30 AM Call CH Tech01	Hutman.t.mst Anderson IE Jonathan Sommer.Chris AsiaPac Sales Meeting Conference Call Hutfman.Betty Browser	Chris Huffman	Use (Confe Acco
D/Status : Employee:Friend (1 item)			- Com
ID/Status : Prospect (1 item)			
ID/Status : Prospect,Vendor (1 item)			

See also

Panel Title Panel Wizard Icon Filter Icon Display Type Icon User Icon Contact Group Icon Export to Excel Icon List Sorting List Sittering 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.

े 🖓 🚮 🖁 📽 छ		6		Activity L	.ist	(24)	- 4/8/2009 - 5/8/2009	1 8
Date 🛛 🖓	Type V	Priority	V Company V	Scheduled Contacts	✓ Regating	Scheduled For	V ID/Status	1
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.

ु ् 🖬 🎖 💥 छ				Activity Lis	Ľ	(P4) -	4/8/2009 - 5/8/2009	8
Date 7	7 Type 🕐	Priority	V Company	Scheduled Contacts	✓ Regarding	Scheduled For	▼ ID/Status	2
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	Alison Mikola	Prospect	
04/22/2009 10:00 AM	Call	Low	Nagengast Estate Winery	Scott Nagengast	Get the Order	Ernst Anderson	Prospect,V	e
04/23/2009 09:30 AM	Call	Low	International Salari	Vivian Grace	Confirm Appointment	Alison Mikola	Customer	
04/24/2009 08:30 AM	Call	Medium	CH Gournet Colfee	Fred Fenderline;Sarah Whiting;Chris Hulfman	European Sales Meeting Conference Call	Chris Huffman	Employee.F	ł
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.

	.=	Activity L	ist			(24) - 4/8/2009 - 5/8/2009
▼ Company ▼	Scheduled Contacts	✓ Regarding	Scheduled For	▼ ID/Status	Referred By	🗸 🔍 Details 🛛 🗸
Widget Corporation	Max Headlong	Confirm Appointment	Alison Mikola	(Custom)	ž	
CH TechONE	Jonathan Sommer,Chris Huffman;Betty Browser	AsiaPac Sales Meeting Conference Call	Chris Huffman	(Blanks) (NonBlanks) Customer		Use Company Conference Call Account to dial in:
Great Northern Colfee	Tommy Morgan	Prospect Call	Alison Mikola	Employee Employee Friend		B 1 000
Nagengast Estate Winery	Scott Nagengast	Get the Order	Ernst Anderson	Prospect	~	
International Safari	Vivian Grace	Confirm Appointment	Alison Mikola	Customer		
CH Gournet Coffee	Fred Fenderline;Sarah Whiting;Chris Huffman	European Sales Meeting Conference Call	Chris Huffman	Employee Friend	ß	Password for Conference Call: 78934567
Continental Energy	Herman Getter	Confirm Appointment	Alison Mikola	Customer		1232.05

- 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.

् 👰 🏅 🚜 🔍	.=	Activity List				(12) - 4/8/2009 - 5/8/2009
▼ Company	V Scheduled Contacts	✓ Regarding	Scheduled For	▼ ID/Status	Referred By	♥ Details ♥
CH TechONE	Jonathan Sommer,Chris Huffman;Betty Browser	AsiaPac Sales Meeting Conference Call	Chris Huffman	Employee	V	Use Company Conference Call Account to dial in:
CH TechONE	Allison Mikola	Networking Breakfast	Alison Mikola	Employee		n i 2001
CH TechONE	Ernst Anderson	Breakfast Networking Group	Ernst Anderson	Employee		
CH TechONE	Melissa Pearce	Stall Meeting	Chris Huffman	Employee		
CH TechONE	Allison Mikola;Chris Hulfman:Ernst Anderson	USA Sales Meeting	Chris Huffman	Employee		
CH TechONE	Allison Mikola;Chris Huffman:Ernst Anderson	USA Sales Meeting	Chris Hultman	Employee		
CH TechONE	Allison Mikola;Chris Hulfman:Ernst Anderson	USA Sales Meeting	Chris Hullman	Employee		
CH TechONE	Ernst Anderson	Expense and Sales Reports	Ernst Anderson	Employee		
CH TechONE	Juliette Rosseux	Weekly Finance Meeting	Chris Hultman	Employee		
CH TechONE	Chris Huffman	Network Breakfast	Chris Huffman	Employee		
CH TechONE	Chris Huffman	Write Article for E-Newsletter	Chris Huffman	Employee		
CH TechONE	Allison Mikola	Prepare Sales Report and Plan Next Week	Allison Mikola	Employee		

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.

	Operator	Operand	
And conditions	×	((DBNull))	
Or conditions			
Add a condition			
Delete Condition			
ОК			
Cancel			

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

	Operator	1	Operand	ł
And conditions	Contains	~	Employee	•
Or conditions				
Add a condition				
Delete Condition				
ОК				
Cancel				

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

	Operator		Operand	Ú.
 And conditions 	Contains	*	Employee	
Or conditions	Does not contain	*	Customer	
Add a condition				
Delete Condition				
ОК				
ОК				
OK Cancel				

× 😸 Enter filter criteria for ID/Status Operator Operand And conditions 🔳 Contains Employee ¥ ~ O r conditions 📺 Does not contain V Customer ((DBNull)) ¥ v Add a condition **Delete Condition** ΟK Cancel [ID/Status] Contains 'Employee' AND [ID/Status] Does not contain 'Customer'

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

	Operator		Operand	1
And conditions	🔲 🔳 Contains	*	Employee	•
Or conditions	Does not contain	*	Customer	
Add a condition				
Delete Condition				
Cancel				
Cancel				
Cancel				

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

⊖⊂,₩¥¥¥≈;≣		Activity List				(13) - 4/9/2009 - 5/9/2009	
V Company	V Scheduled Contacts	✓ Regarding	Scheduled For	VID/Status	Referred By	▼ Details	7
CH TechONE	Ernst Anderson	Breakfast Networking Group	Ernst Anderson	Employee			
CH TechONE	Melissa Pearce	Stalf Meeting	Chris Huffman	Employee			
CH TechONE	Allison Mikola;Chris Huffman,Ernst Anderson	USA Sales Meeting	Chris Huffman	Employee			
CH TechONE	Allison Mikola;Chris Huffman,Ernst Anderson	USA Sales Meeting	Chris Huffman	Employee			
CH TechONE	Allison Mikola:Chris Hulfman,Ernst Anderson	USA Sales Meeting	Chris Huffman	Employee			
CH TechONE	Ernst Anderson	Expense and Sales Reports	Ernst Anderson	Employee			
CH TechONE	Juliette Rosseux	Weekly Finance Meeting	Chris Hulfman	Employee			
CH TechONE	Allison Mikola	Prepare Sales Report and Plan Next Week	Allison Mikola	Employee			
CH TechONE	Chris Huffman	Network Breakfast	Chris Huffman	Employee			
CH TechONE	Allison Mikola	Networking Breakfast	Allison Mikola	Employee			
CH TechONE	Jonathan Sommer;Chris Huffman;Betty Browser	AsiaPac Sales Meeting Conference Call	Chris Huffman	Employee		Use Company Conference Call Account to dial i	inc
CH TechONE	Chris Huffman	Write Article for E-Newsletter	Chris Huffman	Employee		n 1 m	35
CH Gournet Coffee	Fred Fenderline/Sarah Whiting/Chris Hulfman	European Sales Meeting Conference Call	Chris Huffman	Employee,Friend	J	Password for Conference Call 78934567	E).

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.

0 🤍 🖬 🛔	1 2				Opp	por	tunity List					(18) - 3/9/2009 - 5/8/2009		2
Estimated Close Date	V	Company	▼ Contact	V	Stage	V	Tota	ID/Status	V	Details	V	Record Manager	7	^
04/28/2009		Corleone's Pasta Company	Morty Ma	anicotti	Commitment to Buy		\$12,000.00	Friend;Custom	ver			Allison Mikola		
04/30/2009		Circle Photography	Jonathar	n Jenkins	Presentation		\$8,000.00	Customer,Frier	nd			Allison Mikola		
03/31/2009		Continental Detective Agency	Nick Cha	arles	Presentation		\$8,000.00	Prospect				Allison Mikola		
04/30/2009		Duke Industries	Rockwei	I Toney	Negotiation		\$4,000.00	Prospect				Allison Mikola		
03/28/2009		Duke Industries	Marion M	forrison	Negotiation		\$4,000.00	Prospect				Allison Mikola		
03/31/2009		Continental Energy	Herman	Getter	Commitment to Buy		\$2,000.00	Customer				Allison Mikola		
04/30/2009		Brandee's Bakery	Mackens	zie Jensen	Presentation		\$500.00	Customer				Allison Mikola		
03/20/2009		Yellow Jersey Bikes	Lance J.	Parker	Sales Fulfilmeni	t i	\$12,000.00	Customer				Chris Huffman		
03/31/2009		Superior Technologies	Neilson \	Watts	Presentation		\$12,000.00	Customer				Chris Huffman		×

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.

् 🖳 🖁 🖁	8 8. :=		Орр	ortunity List		(18) - 3/9/20	09-5/8/2009 🛞
Estimated Close Date	▼ Company	▼ Contact	▼ Stage	⊽ TotalΣ⊽	ID/Status 🛛 🖓	Details 🗸 🗸	Record Anager
04/30/2009	A1 Services	Andy Harrison	Negotiation	\$2,500.00	Customer		Ernst Ande
03/28/2009	Hershey Chocolate Company	Milton Hershey	Sales Fulfilment	\$2,000.00	Influencer,Vendor		Ernst Ande
04/14/2009	E D Enterprises	Claire Haldane	Negotiation	\$4,000.00	Prospect		Ernst Ande
04/30/2009	County Tennis Supplies	Chris Burn	Presentation	\$2,500.00	Prospect		Ernst Ande
03/14/2009	County Tennis Supplies	Chris Burn	Negotiation	\$2,000.00	Prospect		Ernst Ande
Grand Summarie	5			-	11		
				Sum = 113500.0000 Minimum = 500.0000 Maximum = 12000.0)		
<					0.00		>

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 Home > Dashboard Elements > Panel Toolbar > 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.

(18) 4/8/200	9 - 5/8/2009	83
ID/Status 🛛 🗸	Referred B	^
The date range being	used for th	ie d
(18) (4/8/200	9-5/8/2009	23

ID/Status V Referred B

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

From	Today 😽	
To	Next 30 Days 🛛 🗸	
Qui	ck Dates	
	Today	
	Current Week	
	Current Month	
	Next 30 Days	
	Last 30 Days	
	20 Year Span	٦

See also

2.

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.

TOPLINE / DASH	Panel Wizard
498970a 110	
Welcome to th	e Panel Wizard
This wizard will assis two elements - a dat	t you with creating or modifying a panel for TopLine Dash. Most panels consist of a component and a display style.
Data Component	
This is the data source component is where	e for your panel. Select the option that will return the data that you want. The data you will filter your data so that you only get the data that you want.
Display Style	
This is how you want	to see the data that you selected. The most common selections are a List, Graph or
KPI. Not all display s	tyles are available for all data components.
	Show Welcome Screen When Panel Wizard Opens
	<< Prev Next >>
	OK Crossel

3. A blank panel is inserted.

	by	ly Graph User	440/2009 - 540/2009	25 0 4 1 4	Activity Graph by 4/6/2009 -5/6/2009 25	0	Blank	
	16		Call - (2)	18 16 14 12 10 8	16 Chris Huffman - (18)			
	2			4 2 2				
Ch	idis Huffma	Priori		Call	Meeting Current Activity List		(18)	-46/2009 - 5/6/2009
Ch	ris Huffme	Priori V	Company 7	Call	Meeting Current Activity List Regarding	Scheduled For	(18) V ID/Status	-46/2009 - 5/6/2009
Ch V V 0/2009 0/2009	ris Huffme Type Meeting Meeting	Priori V by Low Mediu m	Company 5 CH TechONE CH TechONE	Call Contacts Juliette Rosseux Alison Mikola;Chris Huffman;Ernst	Meeting Current Activity List Regarding Weekly Finance Meeting USA Sales Meeting	Chris Huffman	(18) V ID/Status Employee Employee	Referred B
Ch Ch 2/2009. 2/2009. 3/2009.	ris Huffme 23 III = Type ▼ Meeting Meeting Meeting	Priori V by Low Mediu m	Company 5 CH TechONE CH TechONE Parsley Group	Call Contacts Juliette Rosseux Alison Mikola,Chris Hulfman-Ernst David Purkis,Will Blake	Meeting Current Activity List Regarding Weekly Finance Meeting USA Sales Meeting Presentation	Scheduled For Chris Hulfman Chris Hulfman	(18) V ID/Status Employee Employee Prospect	Referred B
Ch Ch Ch Ch Ch Ch Ch Ch Ch Ch	ris Huffma Weeting Meeting Meeting Meeting Meeting	Priori V Low Mediu m Low	Company 5 CH TechONE CH TechONE Parsley Group CH TechONE	Contacts Contacts Juliette Rosseux Alison Mikola;Chris Huffman:Emst David Purkis;Will Blake Chris Huffman	Meeting Current Activity List Regarding Weekly Finance Meeting USA Sales Meeting Presentation Network Breaklast	Scheduled For Chris Hulfman Chris Hulfman Chris Hulfman Chris Hulfman	(18) V ID/Status Employee Employee Prospect Employee	-48/2009 - 5.8/2009
Ch V V 0/2009 0/2009 0/2009 0/2009 0/2009 0/2009	Type V Meeting Meeting Meeting Meeting Meeting	Low Low Low	Company 7 CH TechONE CH TechONE Parsley Group CH TechONE Hamison & Graham Garages	Call Contacts Juliette Rosseux Alison Mikola,Chris Huffman,Einst David Purkis,Will Blake Chris Huffman Ella Harrison	Meeting Current Activity List Regarding Weekly Finance Meeting USA Sales Meeting Presentation Network Breakfast Presentation	Scheduled For Chris Hulfman Chris Hulfman Chris Hulfman Chris Hulfman	(18) V ID/Status Employee Prospect Employee Prospect	49/2009 - 59/2009
Ch Ch Ch Ch Ch Ch Ch Ch Ch Ch	ris Huffma Weeting Meeting Meeting Meeting Meeting Meeting Meeting Meeting	Priori V Low Mediu Mediu Mediu Mediu Mediu Mediu Mediu Mediu Mediu Mediu Mediu Mediu Mediu Mediu Mediu	Company 7 CH TechONE CH TechONE Parsley Group CH TechONE Harrison & Graham Garages Dr. Brian Bayne, M. Brian Bayne,	Call Contacts Juliette Rosseux Alison Mikola;Chris Huffman/Ernst David Purkis;Will Blake Chris Huffman Ella Harrison Dr. Brian Bayne, M.D.	Meeting Current Activity List Regarding Weekly Finance Meeting USA Sales Meeting Presentation Network Breaklast Presentation Presentation Presentation	Scheduled For Chris Hulfman Chris Hulfman Chris Hulfman Chris Hulfman Chris Hulfman Chris Hulfman	(18) V ID/Status Employee Prospect Prospect Prospect	46/2009 - 5/6/2009

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.



2. The panel is deleted.



04/10/2009_	Meeting	Low	CH TechONE	Juliette Rosseux	Weekly Finance Meeting	Chris Huffman	Employee	
04/10/2009	Meeting	Mediu m	CH TechONE	Allison Mikola;Chris Huffman;Ernst	USA Sales Meeting	Chris Huffman	Employee	
04/13/2009_	Meeting	Low	Parsley Group	David Purkis, Will Blake	Presentation	Chris Huffman	Prospect	
04/14/2009_	Meeting	Low	CH TechONE	Chris Huffman	Network Breakfast	Chris Huffman	Employee	
04/15/2009_	Meeting	Low	Harrison & Graham Garages	Ella Harrison	Presentation	Chris Huffman	Prospect	
04/16/2009_	Meeting	Low	Dr. Brian Bayne, M.D.	Dr. Brian Bayne, M.D.	Presentation	Chris Huffman	Prospect	~
(44. 8		1. 11		- and - 1 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2		5

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:

_				•).	
From	Today	~		Activity Types	Priority
То	Next 30 Days	~		Call Meeting	 ✓ High Medium-High
 Sh Sh Sh Sh Regard where to below. 	iow Cleared Activities iow Open Activities iow Both ing Filter: Show only I the regarding field is a Separate each item i Click here for more di	the activ equal to with a se	ities the items mi-	Marketing Call Personal Activity Vacation	Medium-Low
				Select All Clear /	All Select All Clear All

- 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 <u>Custom Relative Dates</u>.
- 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 Home > Dashboard Panels > Companies

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:

Component	Fi	eld		Operator		Value		And/Or		A	dd
Company	✓ A	ccess Level	*	Contains	¥		*	And	*	Re	nove
(Component		Field			Operator	Value			11	And/Or	
Company		State			EqualTo	AZ				End	0
Name	ID/Status	Billing City									

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:

Select Group		
TOPLINE/ / DASH	Group	
Select a group to filter yo data for the contacts with	ur information by. It will show only in that group.	-
Canada China Chris' Networking Breakfas Customers-AsiaPac Customers-European Customers-ONE Componer Customers-TWO Componer Customers-USA	t Group nt nt	
Database Users Employees European Employees France		
	OK Cancel	

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:

Component	F	ïeld		Operator		Value		And/Or			Add
Contact	🛩 F	Referred By	¥	Contains	*	Direct Mail	*	Or	×		Remo
[Component		Field			Operator	Value			1	And	VOr
Contact		Referred By			Contains	Website				End	
Name	City	State		I							

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:

Machines Preferences		
TOPLINE / DASH	Machines Preferences	
Custom SubEntity Machines		
Filter by Date		
From		
To		
Filter by Field		
Field	Operator Value	
	OK Car	ncel

- 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 <u>Custom Relative Dates</u>.
- 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:

Component		Field		Operator		Value		And/Or			Add
Company	Y	Access Level	~	Contains	*		*	And	~	R	emove
(Component		Field	ł		Operator	Value			1	And/Or	
Lompany		State	5		Equalio	PZ.				End	
											•
Name	ID/State	as Bill	ing City	1							

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 Opportunites Opportunity Query Products Synchronization Users Other - Contact Details 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:

History	Preferences	
	ASH Histor	y Preferences
Date Fie	ld To Filter On	History Types
History	• End Date 🔽	Access
From	Last 30 Days 💉 🍸	Activity Deleted
To	Today 🔽 🦉	Activity Updated
Regardir where th below. 9 colon. 0	ng Filter: Show only the histories re regarding field is equal to the items Separate each item with a semi- Click here for more details	Call Attempted Call Completed Call Erased Call Left Message Call Received Contact Deleted
		Select All Clear All
		OK Cancel

1. Date Field to be used in Date Filter:

- Create Date
- Edit Date
- End Date (Cleared Date)
- 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 <u>Custom Relative Dates</u>.
- 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:

Notes Pr	eferences	
	LINE/	Notes Preferences
Date Fiel Note - C From To	d To Filter On Date 1/1/2007 Today	
		OK Cancel

1. Date Field to be used in Date Filter:

- Create Date
- Edit Date
- 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 <u>Custom Relative Dates</u>.

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:

Opportunity Preference	5
TOPLINE / DASH	Opportunity Preferences
Date Field To Filter On	ACT! Sales Cycle
	Select All Clear All OK Cancel

- 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 <u>Custom Relative Dates</u>.
- 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:

Component	Field		Operator	v	/alue	And	d/0r		Add
Opportunity	Actua	I Close Date	After Nex	t [days] 💌		Y An	d 🗸	F	Remove
(Component		Field		Operator	Value		1	And/0	Dr
Upportunity		Estimated Liose	9 Date	WithinNext	30			Ena	
Name	OpenDate	Mgr name	Prob	Total	W Total				
Name Upgrade to Warri	OpenDate 11/28/2008 11:	Mgi name Ernst Anderso	Prob n 100	Total 12000.0	W Total 000 12000.00	00			
Name Upgrade to Warri Warehouse Over	OpenDate 11/28/2009 11: 5/20/2007 5:18	Mgi name Emst Anderso	Prob n 100 40	Total 12000.01 12000.01	W Total 000 12000.00 4800.000	00			
Name Upgrade to Warn Warehouse	OpenDate 11/28/2008 11 4/28/2008 144	Mgr name Ernst Anderson Chris Huffman Chris Huffman	Prob n 100 40 100	Total 12000.0 12000.0 12000.0	W Total 000 12000.00 000 42000.00 000 12000.00	00			
Name Upgrade to Warri Warehouse Texas Operations	OpenDate 11/28/2008 11 5/20/2007 5:14 4/28/2008 1:44	Mgr name Ernst Anderson Chris Huffman Chris Huffman	Prob n 100 40 100 65	Total 1 2000.0 1 2000.0 1 2000.0 1 2000.0 1 2000.0	W Total 000 12000.00 000 4800.000 000 72000.00 000 72000.00	00 00 00 00 00 00 00 00 00 00 00 00 00			
Name Upgrade to Warri Warehouse Texas Operations New Opportunity Let Industry	OpenDate 11/28/2008 11: 5/20/2007 518 4/28/2008 1:20 4/17/2008 6:23 4/18/2008 3:05 0-18/2008 3:05	Mgr name Ernst Anderso Chris Huffman Chris Huffman Chris Huffman	Prob n 100 40 100 65 100 - 25	Total 12000.0 12000.0 12000.0 4000.00 9000.00	W Total 000 12000.00 000 4800.000 000 72000.00 000 7900.000 000 4000.000	000 000 000 000 000			
Name Upgrade to Warii Warehouse Texas Operations New Opportunity Loft Update SC for Besta and	OpenDiate 11/28/2008 11 5/20/2007 518 4/28/2008 1:44 4/17/2008 6:03 8/18/2008 1:26 5/20/2017 5:06	Mgr name Ernst Anderson Chris Huffman Chris Huffman Chris Huffman Ernst Anderson Divis Huffman	Prob n 100 40 100 65 100 n 25 10	Total 12000.0 12000.0 12000.0 4000.00 8000.00 2000.00	W Total 000 12000.00 000 4800.000 000 7900.000 00 4000.000 00 4000.000 00 2000.000	000 000 000 000 000 000 000			

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 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:

Products Preferences	
/ DASH Product	s Preferences
Date Field To Filter On Opportunity - Estimated Close Date From Last 30 Days To Next 30 Days Opportunity Status Opportunity Status Popportunity Status Opportunity Status Popportunity	Products Mini Core Replacement ONE Component Service Contract TechONE System TW0 Component
Select All Clear All	Select All Clear All

- 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 <u>Custom Relative Dates</u>.
- 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 AII 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 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 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 Opportunites 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 Duery Custom Sub Entity Group Query Histories Notes Opportunities Opportunities Opportunity Query Products Synchronization Users Other - Contact Details Other - Database Update Panel Comparison Home > Dashboard Panels > Other - Database Update

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 Opportunites 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.

		S	how the field	ds 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 Opportunites Opportunity Query Products Synchronization Users Other - Contact Details Other - Calendar Other - Database Update Home > Advanced Functions

Articles in this section





Printing to Excel



Folders



Custom Relative Dates

Dash Query Designer Renaming Dashboards Protecting Dashboards Deleting Dasboards



Copying Panels







- 4



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.

Query Designer											
TOPLINE	Query [Desig	gner								
Component	Field		Operator		Value	6		And/Or	χ	A	dd
Contact 😽	Referred By	*	Contains	*	Webs	site	~	Or	~	Rer	nove
(Component	Field			Operator		Value)	And/Or	
[Contact	Referred	By		Contains		Direct Mail				Or	
Contact	Referred	By		Contains		Website	Add "(" Add ")" Remove Remove Change T	" (" ") " 'o 'And"		End	•

See also

Renaming Dashboards Protecting Dashboards Deleting Dashboards 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.





3. TopLine Dash dashboard has new name. acts Enhanced Calendar History 30-60-90 vjection Opps Queries Opps Won-Lost Op

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

See also

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

Pro	tecting Dashboards
To prote	ect 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. Rename Make Read-only Delete
2.	Dialog box will appear to confirm this action, click OK.
	Warning: Any changes you make to this dashboard from now on will not be saved to disk

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.

	Rename	
<	Remove Read-only Attribute	
	Delete	
Dialo	bg box will appear to confirm this action, click OK.	
Das	shboar d	
-		
W	Varning: Any changes you make from now on will be sa	wed to disk as you make the chan

OK

3. TopLine Dash dashboard is now unprotected.

\leq	0		al	S	\cap
\sim	C	\sim	a	5	\mathbf{O}

Dash Ouery Designer Renaming Dashboards Deleting Dashboards 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.



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.

Dashboard Saves	90 (Activity Call Report) (Calendar) (Companies) (Con
Extra	atails Opps Graphs Opps Products Opps Projection

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

1	Now	New DB History	M	Undate Demo	Y	Hears	ĺ.
3	new /	New DD History	23	opuare Demo	Л	Users	<u>n – </u>

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!

From	Start of Week - 7	~	
То	5/1/2009	*	

See also

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



Allison Mikola

Chris Huffman

Ernst Anderson

See also

Dash Query Designer Renaming Dashboards Protecting Dashboards Deleting Dashboards 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.)

Print Setup	
Ларцие́ Print Setup	
Report Title Call Report	Items that will be printed Name This Month - Graph This Month - List -PageBreak- Last Month - Graph Last Month - List
List Options - How to Separate lines None Line Shaded	Output Printer Open PDF
Graph Options Graph Size One Third Page	Orientation Portrait Landscape
	Print Print Close

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

Save As					? 🛛
Save in:	🞯 Desktop	×	g ø	• 📰 💙	
My Recent Documents	Hy Documents My Computer My Network Pla	aces			
My Documents					
My Computer					
	File name:	Call Report		· (Save
My Network	Save as type:	PDF		~ (Cancel

4. The PDF of the dashboard is created.



1	107/5003 10.21 13 /W	

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!)

Press the Print button
 Select Excel as Output

DPLINE/ Print Setu	ıp
Report Title Call Report	lteres that will be printed
Name	Name
	This Month - Graph This Month - List -PageBreak- Last Month - Graph Last Month - List
List Options - How to Separate lines	Insert Page Break
○ None	Output
O Line	O Printer O Excel
Shaded	O PDF Open PDF
Graph Options	Orientation
	Portrait
Graph Size	
Graph Size One Third Page	

3. The resulting Excel file will be opened.

Microsoft Excel - Sheet1

:면	Eile Edit View Ir	nsert Format <u>T</u> ools <u>D</u> ata	Window ACT! Help		
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	A1 👻	🏂 This Month - List			
1	A	В	С	D	
1	This Month - List	ę.			
2	Date	Туре	Priority	Company	Scheduled Contacts
3	4/6/2009 11:00	To-do	Medium	Brandee's Bakery	Mackenzie Jensen
4	3/13/2009 11:30	Meeting	Low	A1 Services	Andy Harrison
5	3/6/2009 0:00	Call	Low	Studio Designs	Lucy Connor
6	2/27/2009 0:00	To-do	Low	Studio Designs	Lucy Connor
7	Last Month - List				
8	Date	Result	Contact	Company	Regarding
9					
10					
11					
12					
13					
14					
15					

See also

Dash Query Designer Renaming Dashboards Protecting Dashboards Deleting Dashboards Dashboard Sub Folders Custom Relative Dates Copying Panels Moving Panels Printing to PDF Update Fields Home > Advanced Functions > Update Fields

Update Fields

Selected <u>panels</u> 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

04/22/2009 03:00 PM	Meeting	Low	Superclean	Mike Campbe	:1	Presentation	
04/27/2009 11:30 AM	Meeting	Low	Finch Legal Aid	Jean Louise F	Finch	Lunch Meeting	
04/29/2009 09:30 AM	Meeting	Low	Boomer's Artworx	Emily Dunn		Discuss Plans fi	or Case Study
05/01/2009 08:30 AM	Meeting	Low	Robertson Joinery	Julie Mile:	Reschedule Ad	tivity	
05/04/2009 10:30 AM	To-do	Low	Newtown Builders Ltd.	Jason Mc	Update Fields		
05/07/2009 10:00 AM	Meeting	Low	E H Studios	Craig Pott	Clear Activity		
05/08/2009 10:00 AM	Meeting	Low	E D Enterprises	Claire Hal	Delete Activity		
04/22/2009 10:00 AM	Call	Low	Nagengast Estate	Scott Nag	Delete Activity		
			Winery		Go To Contact	:	
					Go To Compan	1V	

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

Update Field	
TOPLINE / DASH	Update Field
Details tocation Date End Date Priority Regarding Source	Character Field Text Value Palace Replace Add To Remove From
	OK Cancel

- 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.

04/22/2009 03:00 PM	Meeting	Low	Superclean	Mike Campbell	l Presentation		
04/27/2009 11:30 AM	Meeting	Low	Finch Legal Aid	Jean Louise Fi	nch Lunch Meeting		
04/29/2009 09:30 AM	Meeting	Low	Boomer's Artworx	Emily Dunn	Discuss Plans	for Case Study	
05/01/2009 08:30 AM	Meeting	Low	Robertson Joinery	Julie Miles	Reschedule Activity		
05/04/2009 10:30 AM	To-do	Low	Newtown Builders Ltd.	Jason Mc	Update Fields		
05/07/2009 10:00 AM	Meeting	Low	E H Studios	Craig Pott	Clear Activity		
05/08/2009 10:00 AM	Meeting	Low	E D Enterprises	Claire Hal	Delete Activity		
04/22/2009 10:00 AM	Call	Low	Nagengast Estate	Scott Nag	Delete Activity		
			Winery		Go To Contact		
					Go To Company		

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

Update Field		
TOPLINE / DASH	Update Field	
Result Regarding Details Record Manager Date End Date Duration	 Adjust by a Relative Amount Hours O Days Months 	Set Fixed Date April, 2009 Sun Mon Tue Wed Thu Fri Sat 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 4 5 6 7 8 9 Today: 4/9/2009 4/9/2009 4/9/2009 4/9/2009 4/9/2009
		OK Cancel

- Select the appropriate function:

 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

04/22/2009 03:00 PM	Meeting	Low	Superclean	Mike Campbe	ell l	Presentation	
04/27/2009 11:30 AM	Meeting	Low	Finch Legal Aid	Jean Louise F	Finch I	Lunch Meeting	
04/29/2009 09:30 AM	Meeting	Low	Boomer's Artworx	Emily Dunn		Discuss Plans for Case Study	
05/01/2009 08:30 AM	Meeting	Low	Robertson Joinery	Julie Mile:	Reschedule Acti	vity	
05/04/2009 10:30 AM	To-do	Low	Newtown Builders Ltd.	Jason Mc	Update Fields		
05/07/2009 10:00 AM	Meeting	Low	E H Studios	Craig Pott	Clear Activity		
05/08/2009 10:00 AM	Meeting	Low	E D Enterprises	Claire Hal	Delete Activity		
04/22/2009 10:00 AM	Call	Low	Nagengast Estate	Scott Nag	Delete Activity		
			Winery		Go To Contact		
					Go To Company	8	

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

Update Field		
/ DASH Up	odate Field	
Result Regarding Details Record Manager Date End Date Duration	Users Select the User to assign Allison Mikola Melissa Pearce Juliette Rosseux Fred Fenderline Betty Browser Sarah Whiting Jonathan Sommer Ernst Anderson Chris Huffman	
		OK Cancel

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 Dashboard Sub Folders Custom Relative Dates Copying Panels Moving Panels Printing to PDF Printing to Excel Home > Tutorials

Articles in this section



See also Welcome Installation Dashboard Elements Dashboard Panels Advanced Functions Dashboard Editions FAQ
Home > Tutorials > Simple Single Panel Dash

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 Home > Tutorials > 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 Home > Dashboard Editions

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	 Image: A start of the start of			 ✓ 	
View all active ACT! users data including	 Image: A start of the start of	 ✓ 	~	 ✓ 	 ✓
Multiple panels per dashboard	 Image: A start of the start of	 ✓ 	~	 ✓ 	 ✓
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



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

Home > FAQ > 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
- 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.
- 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 version ACT! 2006. If you have ACT! 2007 you can use version 7.6

See also System Requirements

Index

TopLineDash