

TableMakerPRO User Manual

<http://www.effsolutions.com/tablemakerpro>

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Product Overview

Effective Solutions has created a utility to allow you to build and maintain Custom Table Entities within your ACT v10.02 and higher databases.

NOTE: You will need to be on ACT! 2008 Version 10.0.2.191 or higher in order for this utility to work. From within ACT you can go to Help > About ACT! to verify the version level of your ACT! software.

The example below shows a custom table (entity) built in an ACT database to track machine equipment installed.

Notes	History	Activities	Opportunities	Groups/Companies	Secondary Contacts	Documents	Contact Info	User Fields	Home Address	Equipment
Add Edit Delete Lookup Export Edit/Replace										
Install Date	Equip Type	Mfg	Model	Retail Price	Serial Number					
3/24/2008	Laptop Computer	Dell	Latitude D630	\$1,500.00	111222333					
3/4/2008	Monitor	Viewsonic	V500	\$300.00	B123C567					
3/3/2008	Printer	Lexmark	LX300	\$300.00	34555					

If you click on the EDIT button on the tab, or double-click on an item, a dialog box will pop up that lets you edit the information.

The screenshot shows a dialog box titled "Equipment" with a close button (X) in the top right corner. It contains six input fields arranged in two columns and three rows. Each field has a dropdown arrow on its right side. The fields are: Install Date (3/24/2008), Model (Latitude D630), Mfg (Dell), Serial Number (111222333), Equip Type (Laptop Computer), and Retail Price (\$1,500.00). At the bottom of the dialog are two buttons: "OK" and "Cancel".

Installing and Licensing TableMakerPRO

NOTE: You will need to be on ACT! 2008 Version 10.0.2.191 or higher in order for this utility to work. From within ACT you can go to Help > About ACT! to verify the version level of your ACT! software.

Downloading TableMakerPRO

1. Go to <http://www.effsolutions.com/tablemakerpro/>
2. Click on the most recent version of the software and save it to your computer.

Installing TableMakerPRO

1. Close out of ACT! on the computer you are installing
2. Double-click on the install file, or go back out to the website and select the RUN option to install the software immediately.
3. You will get the following Installation window.



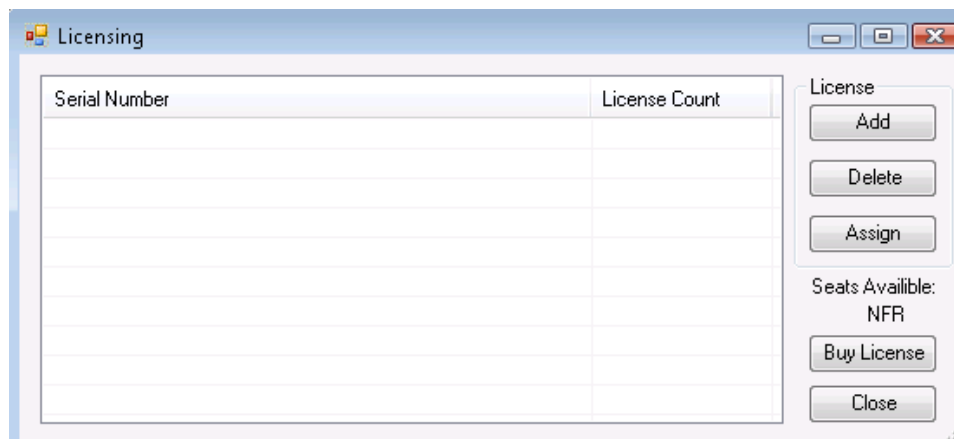
4. Click on the INSTALL button.
5. You will get a window saying the install has completed. Click on the FINISH to exit.

NOTE: You will need to install the TableMakerPRO software on each workstation that you would like to use the Custom Table tab(s) you build.

Purchasing and Licensing TableMakerPRO

TableMakerPRO licenses are tied to the user logins in ACT!. You will need to purchase a TableMakerPRO license for each user that you would like to have Custom Table functionality.

1. After installing TableMakerPRO on your computer, you can go into ACT! and go to TOOLS > TableMakerPRO Licensing.
2. You will get a window similar to the one below.



3. From this window, click on the BUY LICENSE button and you will be taken to a website where you can purchase the appropriate number of licenses.
4. You will be emailed your license number. When you receive it, click on the ADD button to add the license number to your system.
5. Then click on the ASSIGN button to assign the license to the specific ACT users. The custom tables will not appear unless the ACT user has a license assigned to them.

Creating a Custom Table (Entity)

The TableMakerPRO utility from Effective Solutions lets you create a custom table entity in your ACT database and define the fields within your custom table. You can create multiple custom tables (entities) within your ACT database. Custom Tables will synchronize out to any remote databases you may have. **NOTE: You will need ACT Administrator rights.**

To Create a Custom Table (Entity) in ACT:

1. Go to Tools > Define Entities in ACT.
2. The following dialog box will appear:

Use the CREATE button under the Entity section to create a new custom table entity. You also have edit and delete options, and to set the Field Order of fields on the Add/Edit dialog box.

Field Name	Field Type
Comments	Memo
Equip Type	Character
Install Date	Date
Mfg	Character
Model	Character
Retail Price	Currency
Serial Number	Character

3. When you click on the CREATE button under Entity Tasks, you will get the following dialog box. Fill out the appropriate information to build your Custom Table Entity:

Table Name = Table name in SQL Database

Display Name = Name of Tab that appears in ACT!

Description = Description of table in SQL Database

Add/Modify/Delete Fields within your Custom Table (Entity)

Now that your Custom Table Entity is built, you can add fields to the table. The fields will automatically show up as columns within the Custom Table tab within your ACT! database.

To add fields to your Custom Table Entity:

1. Go to Tools > Define Entities in ACT. **You will need ACT Administrator rights.**
2. The following dialog box will appear:

Use the FIELD ORDER button to set the Field and Tab order for you Add/Edit dialog box.

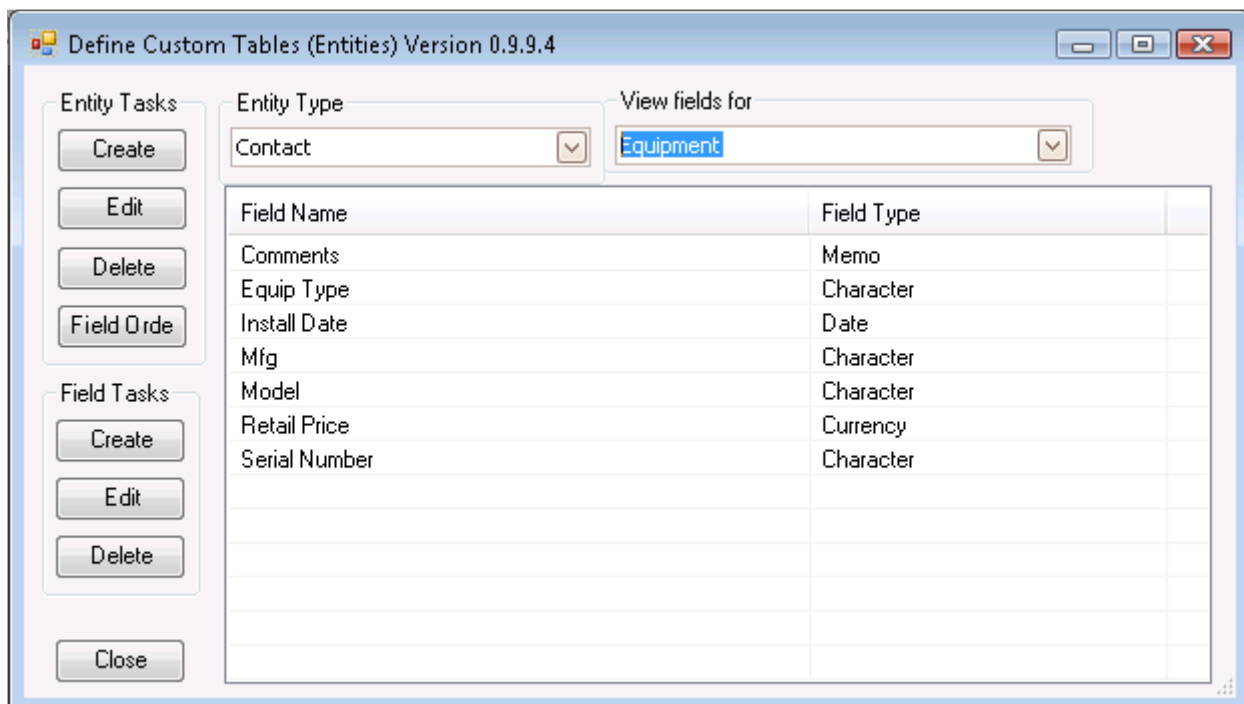
Use the CREATE button under the FIELD TASKS section to create a new field within your table. You also have edit and delete options.

3. When you click on the CREATE button under Field Tasks, you will get the following dialog box. Below are a couple of examples of field creation options:

- Click on the OK button when you have filled out the appropriate field information for each field. As you hit OK, each field will get added to the Custom Table Entity, and in turn added to your Custom Table Tab in ACT.

NOTE: You cannot currently change the type or length of an existing field in a Custom Table entity. If you need to make a change, you will need to delete the existing field and create a new one. We are currently researching the issue, it may potentially be related to a limitation in 10.02. Be careful to define the field parameters properly when creating your fields.

- When you have added your fields to your Custom Table Entity, your dialog box will look similar to the one below.



- From here, simply click on the CLOSE button in the lower left and you will see your updates appear within the Custom Table tab of your ACT! database.

NOTE: Custom Table fields use Drop-Down lists from the main database. To create or maintain your Drop-Down lists in ACT, go to Tools > Define fields. You will see a section on the main dialog box to add or maintain your Drop-Down lists.

Adding information to your Custom Table Tab in ACT!

Once the Custom Table Entity is built and configured, it is pretty straightforward to use. Below is an example of the Custom Table tab we built in the previous exercise.

Install Date	Equip Type	Mfg	Model	Retail Price	Serial Number
3/24/2008	Laptop Computer	Dell	Latitude D630	\$1,500.00	111222333
3/4/2008	Monitor	Viewsonic	V500	\$300.00	B123C567

Simply click on the ADD, EDIT or DELETE buttons to make modifications to entries in the table.

If you click on the ADD or EDIT buttons, you will get a dialog box that pops up that lets you enter or modify information:

Here is an example of what the dialog box will look like when you click on either the ADD or EDIT buttons on the tab.

The dialog box titled "Equipment" contains the following fields:

- Install Date: 3/24/2008
- Model: Latitude D630
- Mfg: Dell
- Serial Number: 111222333
- Equip Type: Laptop Computer
- Retail Price: \$1,500.00

Buttons: OK, Cancel

The DELETE button will ask you to confirm your delete. Currently, you can only delete one item in the table at a time.

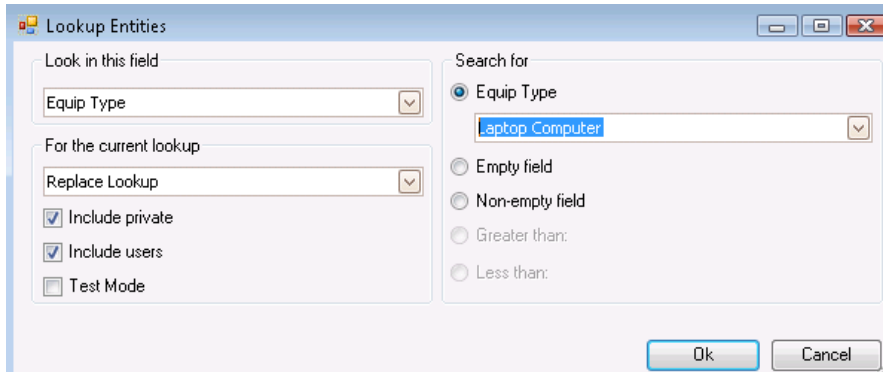
SPECIAL NOTE – WHAT TO DO IF FIELDS ARE MISSING FROM TAB VIEW...

Install Date	Equip Type	Mfg	Model	Retail Price	Serial Number
Customize Columns					

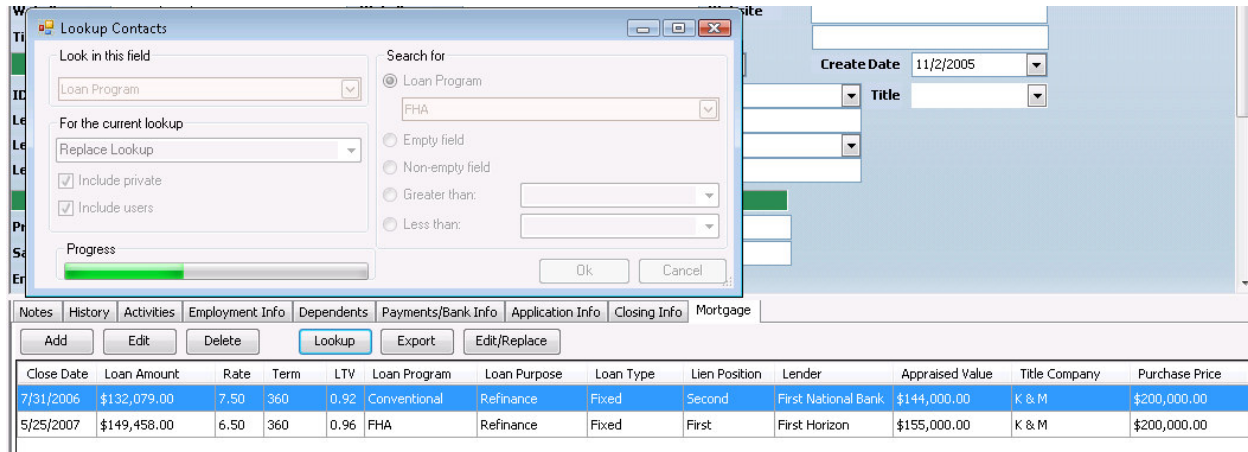
If all of the fields are not showing up in your Custom Table, simply RIGHT-CLICK in the Column Header section of the tab, and select Customize Columns. This will pop up a dialog box allowing you to select which fields in the Custom Table should appear. This setting is local to the ACT users computer, similar to the Contact List View functionality in ACT!.

Custom Table Lookup Functionality

We have built lookup functionality into the custom table tabs that mimics the ACT lookup window. When you click on the LOOKUP button on the tab, you will have the ability to lookup by any of the fields that exist for that custom table. See the example screen shots below.



The more criteria matches you have, the longer the lookup will take. The Lookup window will display a Progress Bar to tell you how far along you are in the process.



The results of the lookup will bring up all of the contacts that match your criteria in a contact list. That is perfect for target marketing. You can then do an email blast or letter campaign to these contacts.

You also have the option to export this information to an Excel spreadsheet for reporting and analysis purposes. See the next section of the manual to find out how to export your custom table information to a file that can be opened in Excel.

Exporting Custom Table Data

Because the table data exists in a 1-to-many structure, you will want to use the Export feature to get specific counts on items. In our example, you may want to count how many Laptop Computers exist in the database.

To handle situations where you would like a report of all rows in the custom table that match a certain criteria, we have added an EXPORT button to the custom tab so that table data can be exported to a CSV or Tab delimited file and then quickly brought into Microsoft Excel.

When you click on the Export button on the custom table tab you will get the following window:

The Export window will tell you how many Entities matched your lookup criteria.

From here you simply select your file type, enter in the filename information, map your field data, and click on OK. The file will then be created.

The Export allows you to select specific contact fields to include with each row of custom table data.

If you save the file as a CSV format, it will automatically come up in an Excel spreadsheet when you double-click on the file. You can then use Excel to create graphs and charts from the data.

Reporting Options

To run reports against the custom table fields in ACT! you will need to use one of the 3rd party reporting tools such as Crystal Reports, and Stonefield Query. Feel free to contact Effective Solutions for more information about reporting directly against the Custom Table data.

EDIT/REPLACE Utility

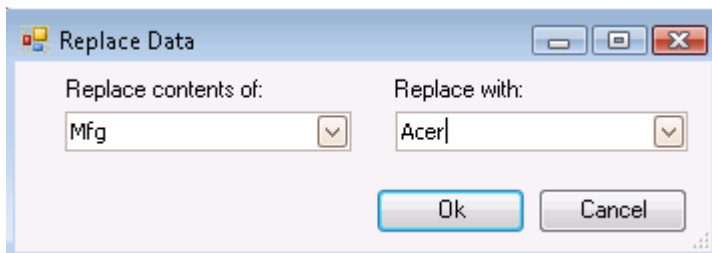
There are situations where you may want to do an Edit/Replace on data that exists within a Custom Table Entity. For our example, let's say that Acer bought Gateway Computers, so now we want to change all of the entries under MFG that say Gateway to Acer.

STEP ONE – Lookup

Use the Lookup button on the Custom Table tab to lookup the information that you want to run the EDIT/REPLACE on. In our example, we will lookup all records that have MFG = Gateway.

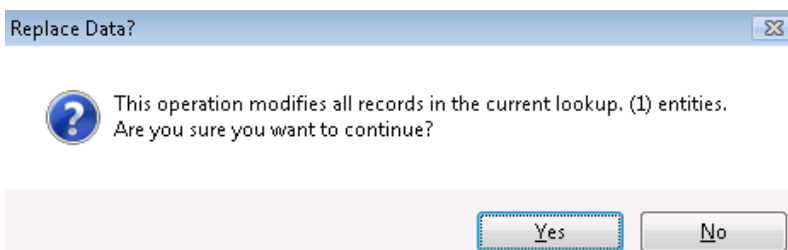
STEP TWO – Run EDIT/REPLACE

Now that you have the proper lookup, click on the EDIT/REPLACE button on your Custom Table tab. You will get a dialog box like the one below.



In our example, we are overwriting the MFG field with Acer for all of the records that had MFG equal to Gateway.

Click OK, and the EDIT/REPLACE function will run. It will prompt you with a confirmation box.



Click on YES to confirm, and you are all set.

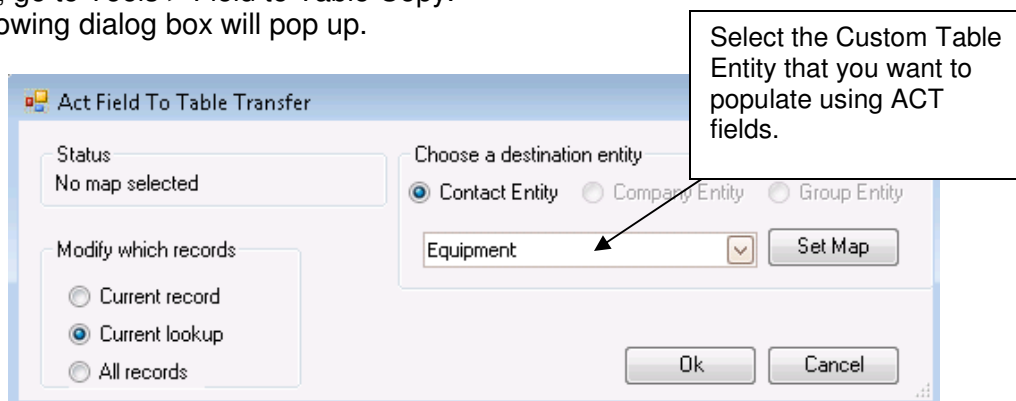
Map Data from ACT fields

You may have an existing ACT database and already has data that needs to be pulled in to the Custom Table Entities that you created.

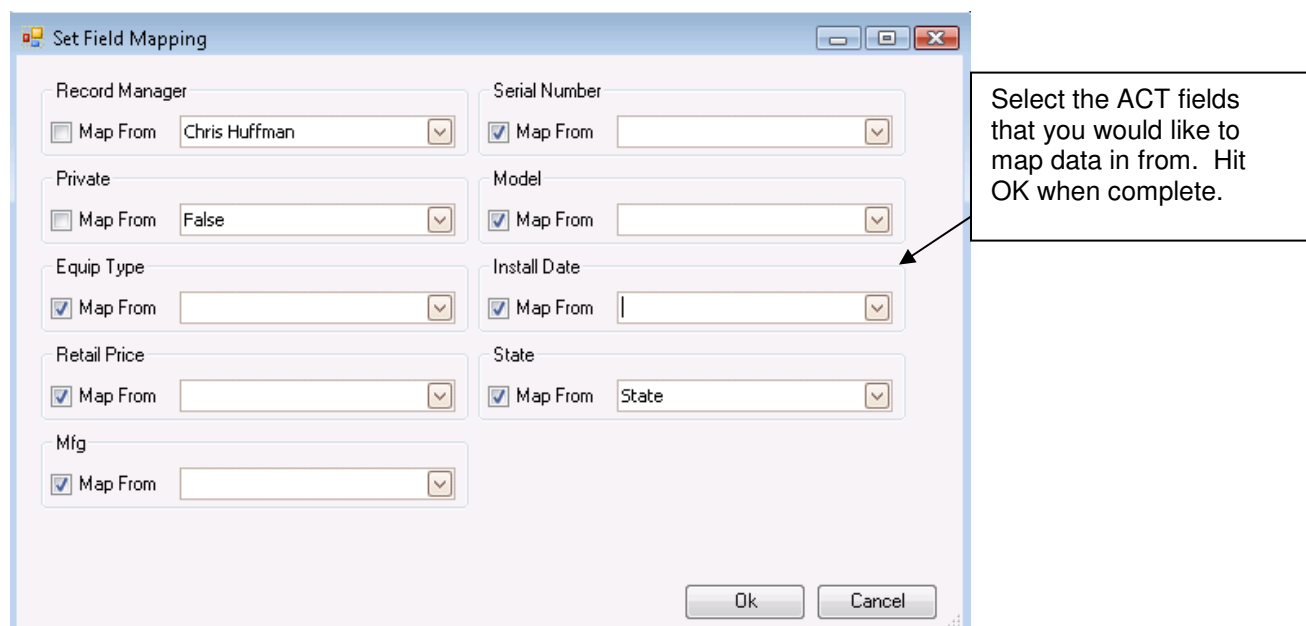
There is an option in the TableMakerPRO utility to map data from fields in your main ACT database into a Custom Table Entity you specify.

To pull in ACT field data into your Custom Table Entity:

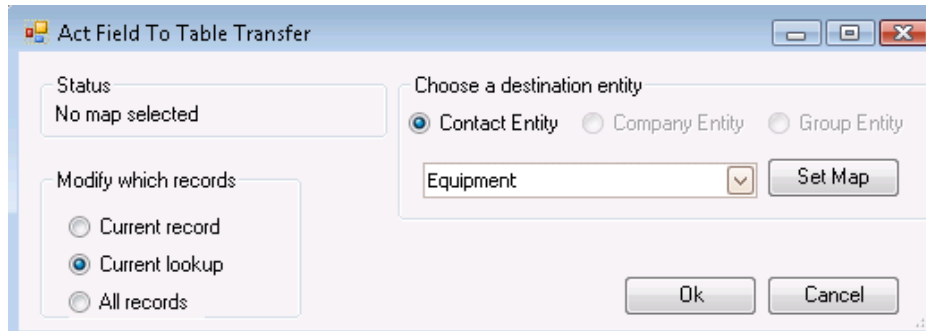
1. In ACT!, go to Tools > Field to Table Copy.
2. The following dialog box will pop up.



3. Select the Custom Table Entity you want to add records to.
4. The first thing you want to do is click on the SET MAP button so you can specify which fields in ACT you want to use to build records in your Custom Table Entity. You will get a dialog box similar to the one below.



5. When you have your field mapping complete, hit OK. You will be back to the main dialog box below.



6. The last step is to select which records to modify. Remember, this utility to pull from the fields in ACT that you selected, and create a corresponding record in the Custom Table Entity.
7. Click on OK to run the utility.