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Titolo	Sage Act! 2011 [[electronic resource] ] : dashboard and report cookbook // Karen Fredericks, Roy Laudenslager
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Descrizione fisica	1 online resource (216 p.)
Collana	Quick Answers to Common Problems
Altri autori (Persone)	LaudenslagerRoy
Disciplina	650 658.812028553
Soggetti	Time management - Computer programs
Lingua di pubblicazione	Inglese
Formato	Materiale a stampa
Livello bibliografico	Monografia
Note generali	Includes index.
Nota di contenuto	Cover; Coyright; Credits; About the Authors; About the Reviewer; www. PacktPub.com; Table of Contents; Preface; Chapter 1: Exploring the ACT! Reports; Introduction; Using the ACT! Reports menu; Using the Reports view; Running a Report from the Report view; Choosing a Report Output Option; Editing Reports in the Reports view; Keeping a list of Favorite Reports; Finding the default location of the ACT! Reports; Chapter 2: Filtering Data in Reports; Introduction; Filtering based on a contact field lookup; Filtering Contact reports; Filtering based on a contact activity lookup Filtering Notes and History in reportsFiltering activities in reports; Filtering Groups reports; Filtering Company reports; Filtering Opportunity reports; Preset filters for most used option; Chapter 3: Creating a Quick Report; Introduction; Setting preferences for the quick reports; Selecting and organizing the columns for a Contact List Quick Report; Printing the Contact List Quick Report; Printing the History tab quick report; Printing the Contact Detail View Quick Report; Exporting the Opportunities List View to Excel; Chapter 4: Working with the Report Editor; Introduction Converting ACT! 6 custom reportsChoosing a template type and setting defaults; Adding fields to template and basic formatting; Naming field objects and individual field formatting; Positioning fields and labels;

Adding a custom field and creating a basic script; Adding sections for sorting and grouping; Using sections for sub-totaling and totaling; Chapter 5: Subreports and Scripting Techniques; Introduction; Formatting a List Type report; Adding subreports to a report; Add fields to the secondary contacts subreport; Adding fields to the history subreport; Scripting basics by example  
Reverse engineering a set of complex scriptsChapter 6: Labels and Envelopes; Introduction; Editing a standard envelope; Adding a logo to an envelope; Creating a custom envelope; Creating an xx64 label template; Chapter 7: Working with the ACT! Dashboards; Introduction; Getting familiar with the Dashboard layouts; Accessing information from Dashboards; Copying Dashboard information to other products; Printing Dashboards; Making Dashboards the default startup preference; Chapter 8: Filtering Dashboards; Introduction; Filtering Contacts Dashboards; Filtering Activity Dashboards  
Filtering Opportunity DashboardsFiltering the Admin Dashboard; Changing the Dashboard Data; Chapter 9: Editing Existing Dashboards; Introduction; Cloning an existing Dashboard; Changing the Dashboard display type; Changing the Dashboard default filters; Changing the Dashboard headers and footers; Changing the Dashboard legends; Changing the Dashboard totals; Changing the Dashboard scales and limits; Setting a Dashboard target; Modifying the closed sales to date component; Changing the Dashboard data charts; Chapter 10: Working with the Dashboard Designer; Introduction  
Creating a new Dashboard

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Sommario/riassunto

Over 65 simple and incredibly effective recipes for creating and customizing exciting dashboards and reports from your Sage ACT! data using this book and eBook

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