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Descrizione fisica	1 online resource (216 p.)
Collana	Quick Answers to Common Problems
Altri autori (Persone)	LaudenslagerRoy
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Lingua di pubblicazione	Inglese
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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 reports
Choosing 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 scripts
Chapter 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 Dashboards
Filtering 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

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
