

Excel Contact Reports

v.1.0

Another efficient and affordable ACT! Add-On by



<http://www.exponencial.com>

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Purpose of the add-on

Excel Contact Reports is an ACT! add-on that allows to merge contact data into an Excel spreadsheet to produce formatted Excel reports in a snap.

Alternatively it is possible to export the data to a CSV file for easy import in other programs.

Installation procedure

Download the program file from our [download page](#) and double-click it to start the installation. Follow the instructions and once the installation is completed, run ACT! and open your database.

An icon should have been added to your Contact toolbar to launch Excel Contact Reports directly from within ACT!. If the icon installation failed, you will have to instruct Excel Contact Reports to create it. Here is how to proceed:

While your database is open, click the Windows *Start* button, go under *Programs*, locate the *Exponencial ACT! Add-Ons* group and click *Excel Contact Reports*.

Then go to the *Options | Integrate with ACT!* menu and add icons or menu items to your ACT! screens as needed. This way, you will be able to quickly launch the program from within ACT!. When prompted, accept that ACT! be re-started.

When ACT! re-starts, whatever icons or menu items you asked to be created will be there to launch Excel Contact Reports.

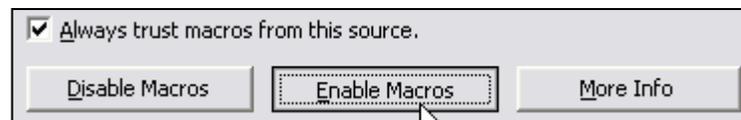
The main screen

Excel Contact Reports ships with preformatted report templates which you see listed when you open the program for the first time.



Simply select the report of your choice and click *Run* and the program will launch Excel and merge the data from either the current contact, current lookup or all contacts in the selected report template, depending on the option selected.

If prompted by Excel, select *Enable macros*. Check *Always trust macros from this source* if you don't want to see this screen again.



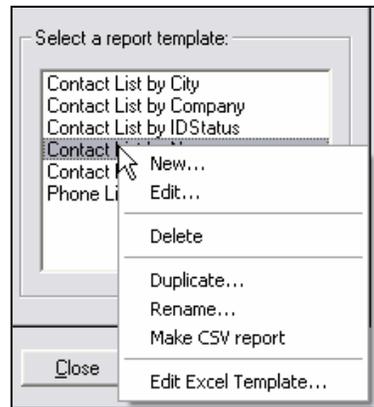
Here is an example of output:

Contact List by City			
Company	First Name	Last Name	Address
Number of contacts in New York:		7	
Brandee's Bakery	Chris	Huffman	13 East 54th Street
CH Gourmet Gifts	Cecil	Carter	13 East 54th Street
CH Gourmet Gifts	Jane	Chan	13 East 54th Street
CH Gourmet Gifts	Allison	Mikola	13 East 54th Street
CH Gourmet Gifts	Jonathan	Sommer	13 East 54th Street
Circle Photography	Melissa	Pearce	13 East 54th Street
Circle Photography	Sarah	Whiting	13 East 54th Street

Creating or editing a report

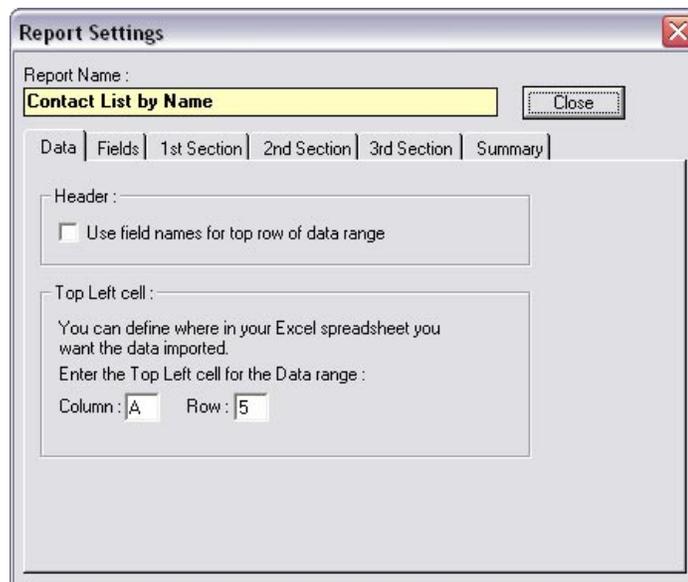
Creating a report is a 2 step process. You first need to define which fields you want in the report, the sort order, the summaries. Then you need to create an Excel template.

The best way to create a new report is probably to duplicate an existing one and work from there. To do this, select the report that looks closer to the one you want to create, do a right-click and in the popup menu, select *Duplicate....* You will be prompted to give the new report a name, then you may edit it. If you don't want to duplicate an existing report, select *New...* and give the report a name.



Defining which fields you want in a report, sort orders, summaries

In both cases, once the report has a name, right-click on it again and choose *Edit....* The *Report Settings* window opens up:

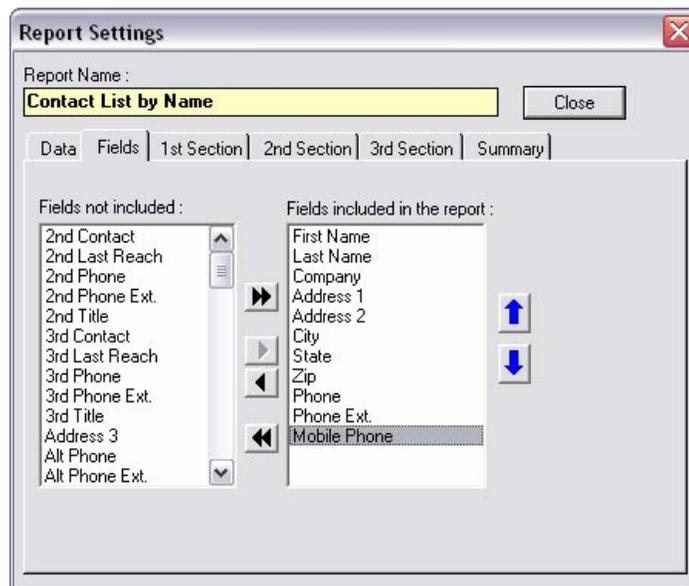


- **The Data tab**

Under the Data tab, you have the option to include the name of the fields as a top row of your data range. This is usually not necessary as you probably want to apply formatting to your report header and this will be better done directly in Excel.

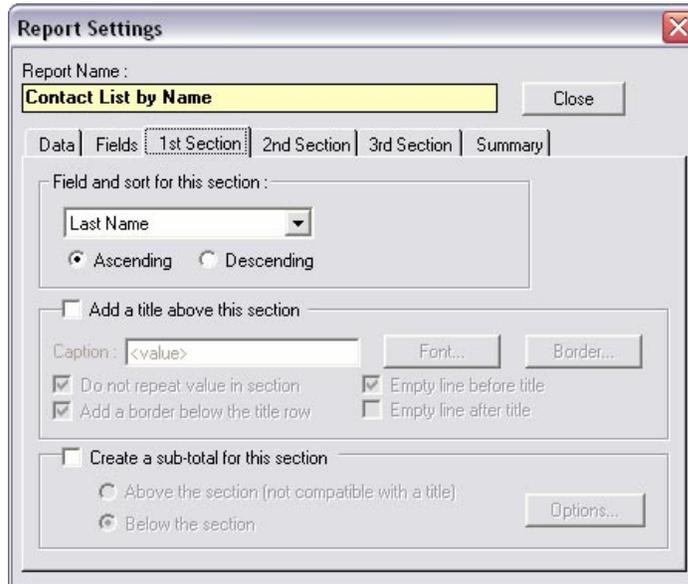
The top left cell option lets you specify where you want the data to be imported in your spreadsheet. Typically you will want to skip the first few rows so that your template header will remain untouched.

- **The Fields tab**



Under the fields tab, you may select which fields you want included in the report. A field may only be included once. Use the arrows to move a field from the Not included list to the Included list. Fields are automatically added at the end of the Included list. Use the blue arrows to move a field up or down in the list.

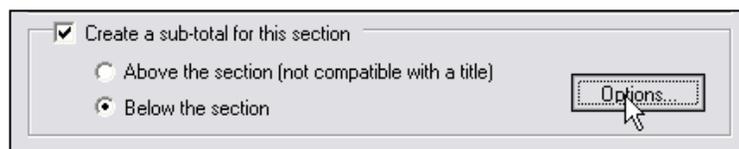
- **The 1st section, 2nd Section, 3rd section tabs**

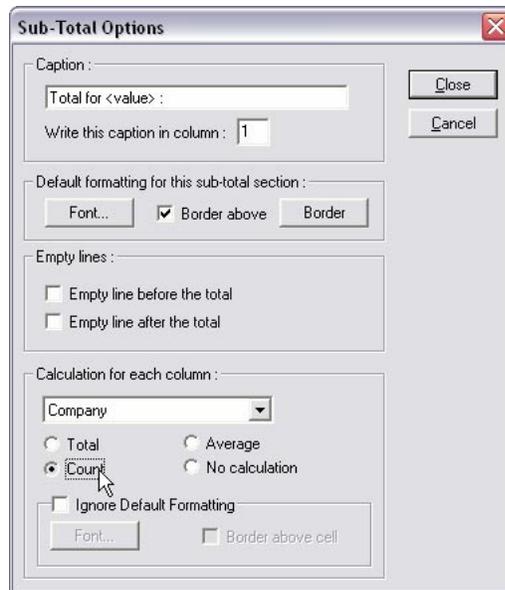


Each report may have up to 3 sections. You can use sections for sorting purposes. To each section corresponds a sort field and a sort order. You may also want to have a title above each section as well as a sub-total which could be either on top or at the bottom of each section.

To better understand how this works, look at the report settings of the *Contact list by City* which has a title and a sub-total.

If you check the *Create a sub-total for this section* checkbox, the *Options...* button will be enabled so that you can define which fields you want totaled.

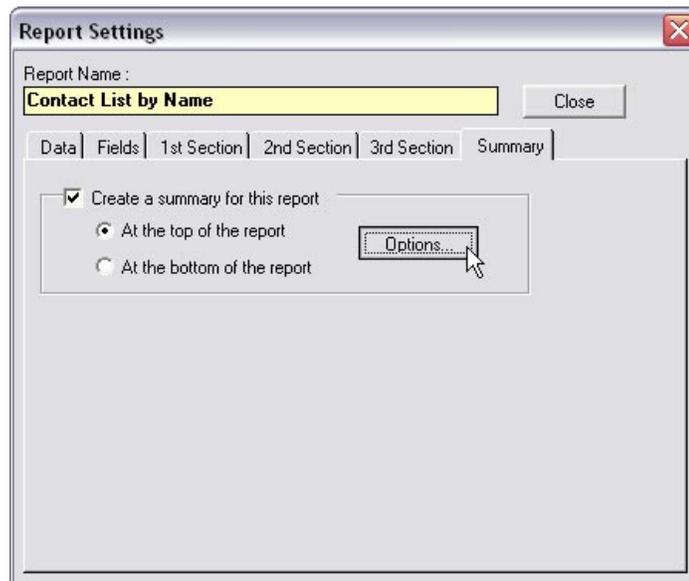




In the *Sub-total options* window, you may give a caption to your totals, format this total line and define a calculation for each different field.

NOTE: The <value> keyword used in the caption of a total will be replaced by the actual value of the sort field for the section (as in "Total for New York" if the sort field of your section is the City field).

- **The summary tab**



Finally you may add a summary at the bottom of your report. The *Options...* button gives you access to the same *Sub-total options* window as seen above.

Creating or editing your Excel template

Once done, do a right-click on the report name and choose Edit Excel Template... at the bottom. Excel will open up the template in edit mode. All changes will be reflected on all reports created based on that template from now on.

There are mainly 2 reasons to edit a report template:

- Changing the header because you added or removed a column
- Changing the column formatting.

NOTE: Excel controls the formatting of the columns. So if you want a column to be in bold, in color, etc. you need to apply this formatting to the column of the template. This is particular useful if your report displays dates, currency values or numbers as it gives you full control of the data format.

Creating CSV files

A CSV file is a text file (no formatting) which can be easily imported in other programs. To create a CSV report follow the same step as described before except that you have no template to create.

NOTE: if you simply want to create a CSV report based on an existing Excel report, do a right-click on this Excel report and choose Make CSV report in the popup menu. The Excel report will remain untouched and a CSV report with the same name will now appear in the list of CSV reports.

Network settings

By default, the template folder is located under the program's main folder on each user's machine. But you may want to change this location to share templates over a network. Simply go to the Options menu and select *Template folder...* to change this default location.

Adding an icon or a menu item to ACT! to launch Excel Contact Reports

As with any of our add-ons, go to the *Options | Integrate with ACT!* menu to display the Integrate with ACT! window and add icons or menu items as needed. Menu items are added to the *Tools* menu.

Support

For support, please contact support@exponenciel.com.