

Advanced Sales Lookup, Export and Reports

v.5.0

for ACT! 2006

Another efficient and affordable ACT! Add-On by

e^xponencial

<http://www.exponencial.com>

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Purpose of the add-on

Advanced Sales Lookup, Export and Reports allows to:

- Create lookups of contacts who are associated with opportunities meeting certain criteria.
- Create lookups of opportunities meeting certain criteria
- Export opportunities meeting certain criteria to a CSV file
- Generate pre-formatted reports in Excel of opportunities meeting certain criteria

Installation procedure

Download the program file from our [download page](#) and double-click it to start the installation.

Note that contrarily to versions supporting previous ACT! versions and because of the changes in ACT!, add-ons are now DLL files and not executable files. This means that they are automatically initialized by ACT! when placed in ACT! plugin folder (a subfolder of the main ACT! directory) and cannot be started from the Windows Start menu anymore. This is why you are not given a choice of installation directory during the installation process.

Upgrading from previous versions

Only your report templates (.XLT files) from previous versions are reusable with the new version. The report settings have to be completely recreated. **DO NOT ATTEMPT TO USE THE OLD FILES EVEN IF THEY HAVE THE SAME EXTENSIONS (.WXL AND WCS).**

New in version 4.0

- Since with ACT! 7.0, you may have more than one product under an opportunity, *Advanced Sales Lookup, Export and Report* now allows to create reports either at the opportunity level or at the product level. To create a product report, simply include a product field in the report definition.
- You may now add calculations for each row of data in your Excel template (see Advanced Techniques: explanation of the commission report).
- It is now possible to insert blank columns in your reports to give you even more control over the look of your report in Excel

Important Known Issue

ACT 8.0.1 has a bug that prevents us from accessing the reasons lists. Sage has assured us that this will be fixed in the next release. In the meantime, this opportunity fields may not be used under the 1st and 2nd condition tabs.

Creating a lookup

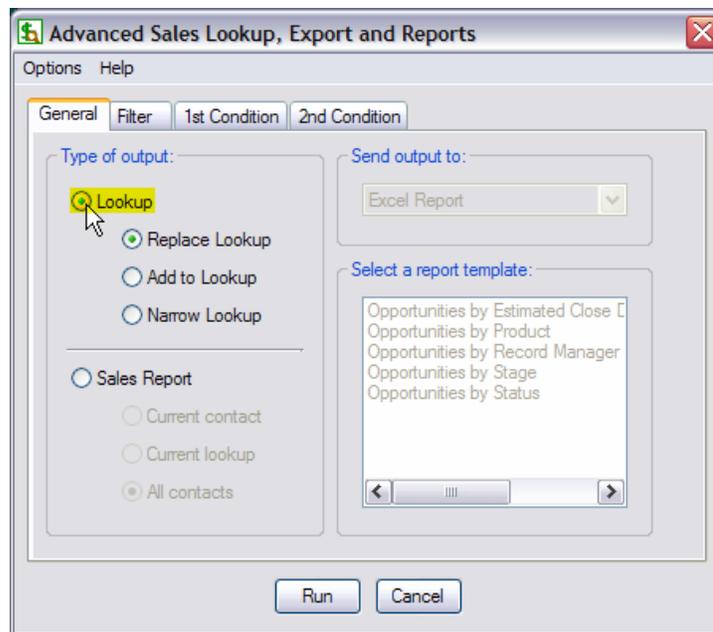
With Advanced Sales Lookup, Export and Reports, you may create either a lookup of contacts (if launched from a Contact screen) or a lookup of opportunities (if launched from the Opportunity List screen).

Creating a contact lookup

Advanced Sales Lookup, Export and Reports allows to create lookups of contacts which sales opportunities meet certain criterias. Note that the filters, 1st and 2nd conditions apply to the sales opportunities not to the contacts.

For instance, you may create a lookup of contacts which opportunities close date is between the 1st of January and the 31st of March. The resulting lookup will list all contacts who have such an opportunity (but who might also have opportunities not meeting the condition as well).

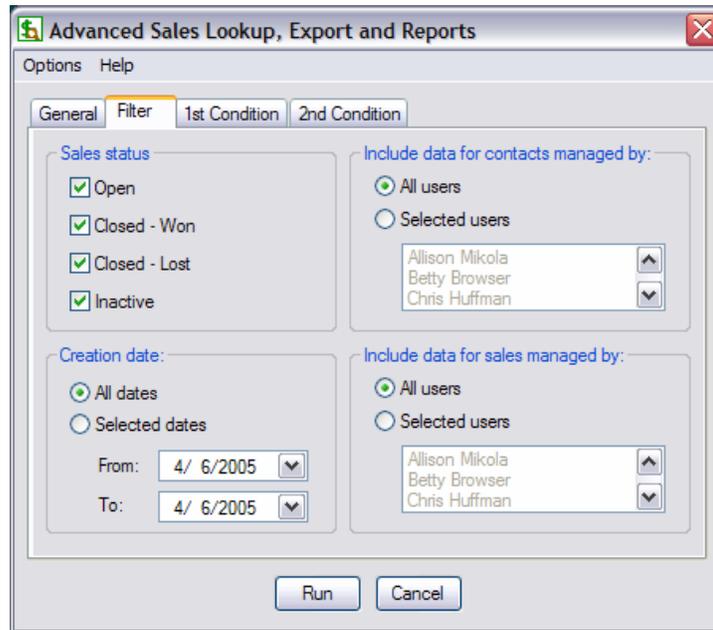
To create a contact lookup, launch the add-on from either the *Contact Detail* or *Contact List* screen. As *Type of output*, select *Lookup*.



Then choose between the 3 traditional ACT! lookup options: *Replace Lookup*, *Add to Lookup* or *Narrow Lookup*.

Applying a filter

Under the *Filter* tab, you have several options allowing to filter the opportunities:

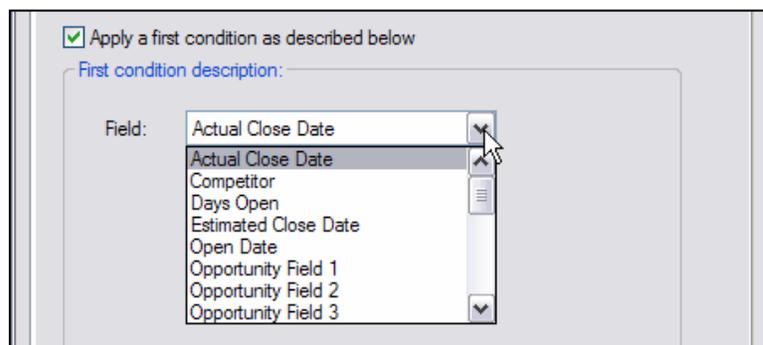


Defining conditions

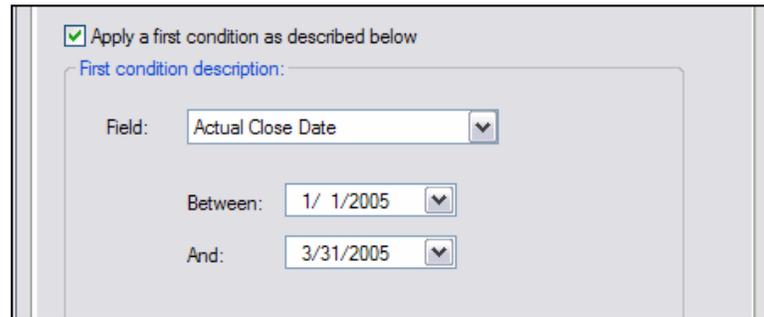
You may also define one or two conditions that the opportunities will meet. For this, check the *Apply a condition* checkbox.



Then pick an opportunity field.



Then define the condition.



Apply a first condition as described below

First condition description:

Field: Actual Close Date

Between: 1/ 1/2005

And: 3/31/2005

Finally press the *Run* button to create the lookup.

Creating an opportunity lookup

If you follow the same procedure as described above, but from the Opportunity List screen, you will obtain an opportunity lookup instead of a contact lookup.

NOTE:

To better explain the difference between the two lookups, here is an example.

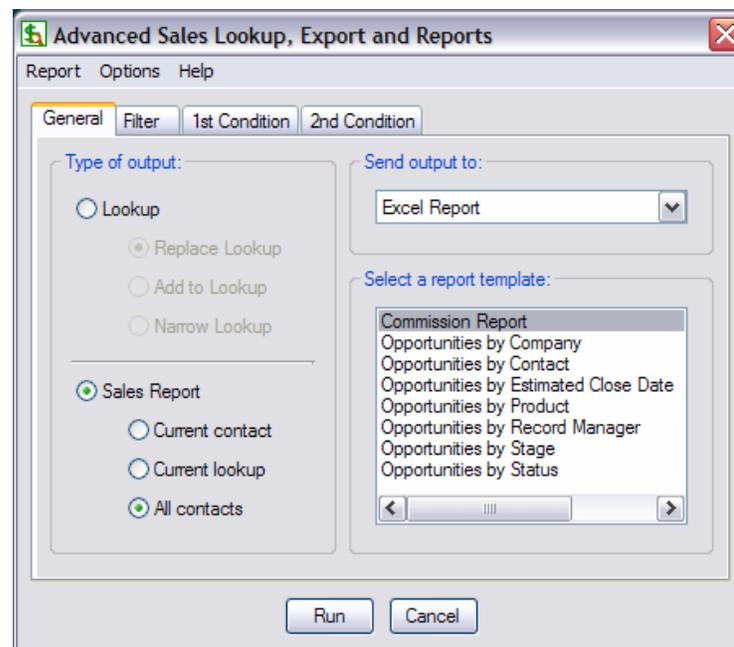
Let's say that you want to lookup the opportunities that were closed today and there are 3 in your database. 2 are associated with ClientA and 1 with ClientB.

If you do a Contact lookup, the add-on will create a contact lookup containing ClientA and ClientB.

If you do an Opportunity lookup, the add-on will create a lookup of 3 opportunities.

Generating a report

To create a report, select *Sales Report* as *Type of output*.



Advanced Sales Lookup, Export and Reports

Report Options Help

General Filter 1st Condition 2nd Condition

Type of output:

Lookup

- Replace Lookup
- Add to Lookup
- Narrow Lookup

Sales Report

- Current contact
- Current lookup
- All contacts

Send output to:

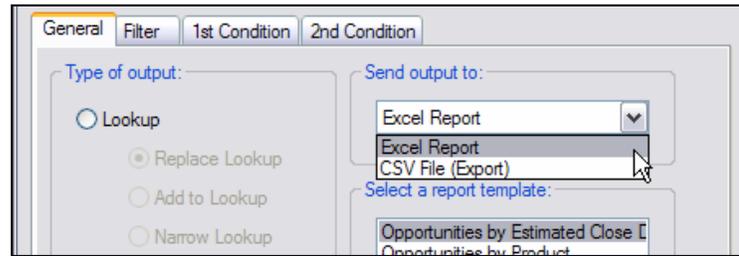
Excel Report

Select a report template:

- Commission Report
- Opportunities by Company
- Opportunities by Contact
- Opportunities by Estimated Close Date
- Opportunities by Product
- Opportunities by Record Manager
- Opportunities by Stage
- Opportunities by Status

Run Cancel

Then choose between *Excel Report* and *CSV File (Export)* in the *Send output to* dropdown list.



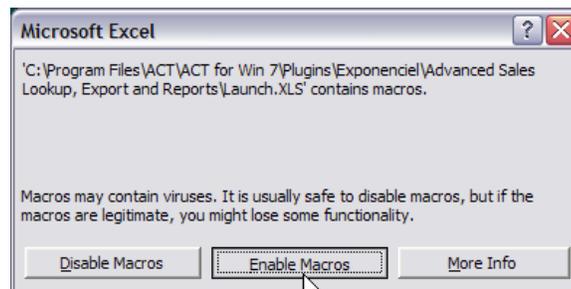
Then select the report template you wish to base the report on.

To filter the opportunities and apply one or two conditions, follow the instructions given in *Applying a filter* and *Defining conditions* under *Creating a contact lookup* above.

Then press the *Run* button.

- If you chose the Excel Report option, Excel will open and display the data using the appropriate template.
- If you chose the CSV File (Export) option, a Save dialog box will open to allow you to name the file in which you want the data stored.

NOTE: Make sure your Excel security settings (Tools > Macros > Security) are not set to *High*, otherwise none of the macros necessary to create the report will be activated. If you choose to set them to *Medium*, when prompted, click *Enable Macros*.



If you want to avoid having to enable macros every time, set your security settings to *Low*.

Creating a report

Since the add-on comes with a number of pre-formatted report, it might be easier to duplicate and modify an existing report (see *Duplicating a report* then *Modifying an existing report* below).

The settings of the report are defined through the *Report Settings* window and they include:

- The fields that ought to be included in the report
- The sort order
- The sub-total and total sections
- The upper left cell of the data section in your Excel spreadsheet and more...

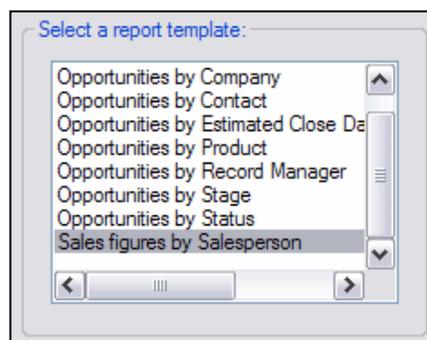
NOTE: The look of an Excel report (except for the sub-total and total sections) and format of the cells is controlled by the **template** of the report.

Naming the report (CSV or Excel Report)

To create a new report, make sure *Sales Report* is selected under *Type of output* and that the type of report you want to create is selected under *Send output to*. Then go to the *Report* menu and choose *New*. You will be prompted to enter a name for the report.

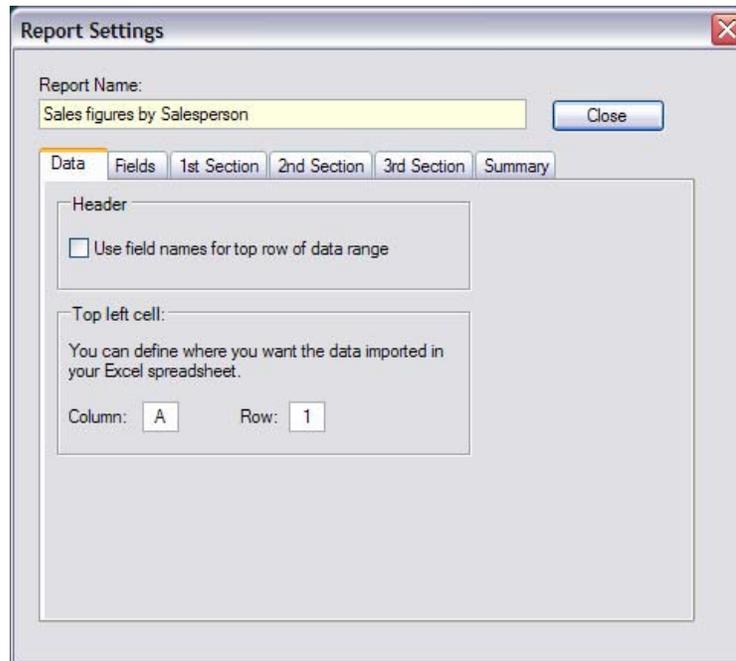


Once you click OK, the name of the report will be shown in the *Select a report template* list.



Defining the report settings (CSV or Excel Report)

Right-click the name of the report in the list and choose *Edit Report Settings...* or go to the *Report* menu again and choose *Edit Settings...* to open the *Report Settings* window. This window contains several tabs. The first tab called *Data* allows to define the header and the top left cell of the data.



1. Data tab

Header

You have the option to export the field names with your data in your Excel spreadsheet. Most likely, you will not want to use this option but rather create your own header in the Excel template you will be using for the report (see below).

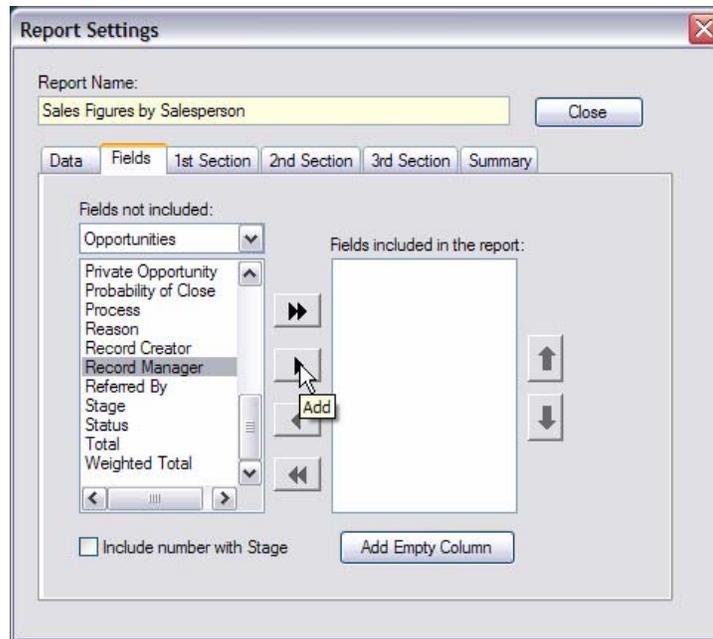
The Top Left Cell

If you decide to create your own header in the Excel template, you will want to keep this header from being overwritten by your sales data when the data is merged into the document. This is when the Top Left Cell settings comes into play. If your header spans over 3 rows as shown below, you will want to have the *Top Left Cell* to be at least A4 if not A5 to allow for a blank line.

	A	B
1	Opportunities by Estim	
2		
3	Date	Company
4		
5		

2. Fields tab

Under the *Fields* tab, you simply select the fields you want included in the report. You may include Contact fields, Opportunities or Products fields.



Use the Up and Down arrow on the left to change the order in which the fields will appear in the report. The top field will be the first column to be displayed and so on.

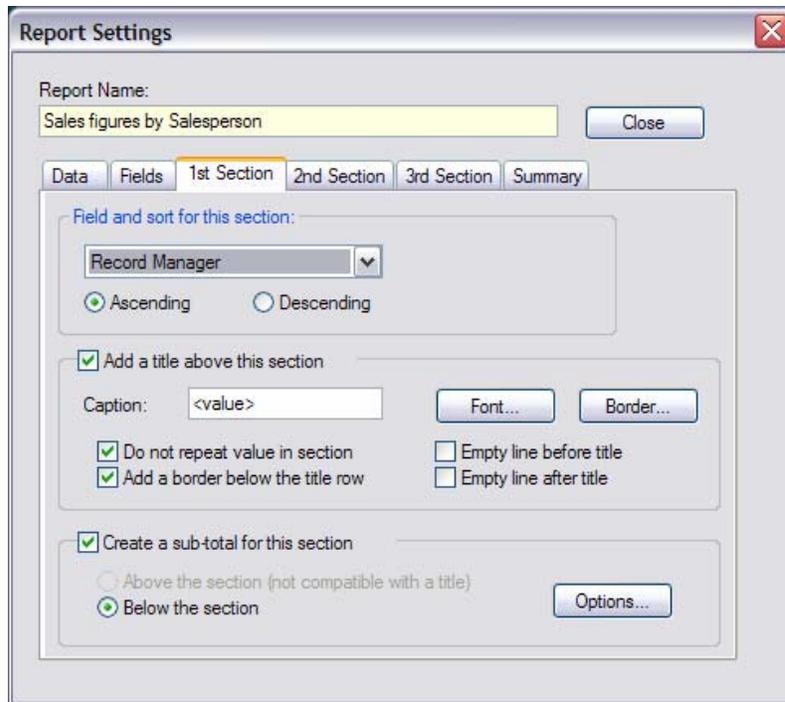
Include number with Stage

If you include the Stage opportunity field in your report, you might want to check the *Include number with Stage* checkbox. The stage name will then be preceded by the stage number (ex: 1. Initial Communication, 2. Needs assessment) so that if you sort the report by stage it will sort them chronologically instead of alphabetically.

3. Sections tab

The following tab (or 3 tabs for an excel Report) allow to define sections. A section is defined by a field which is also the reference for the sort order.

For instance, if you want your report to be sorted by Salesperson, then by Product then by Company, you will have to select Record Manager in the *Field and sort for this section* dropdown list of the 1st section, Product in the same list of the 2nd section and Company in the same list of 3rd section.



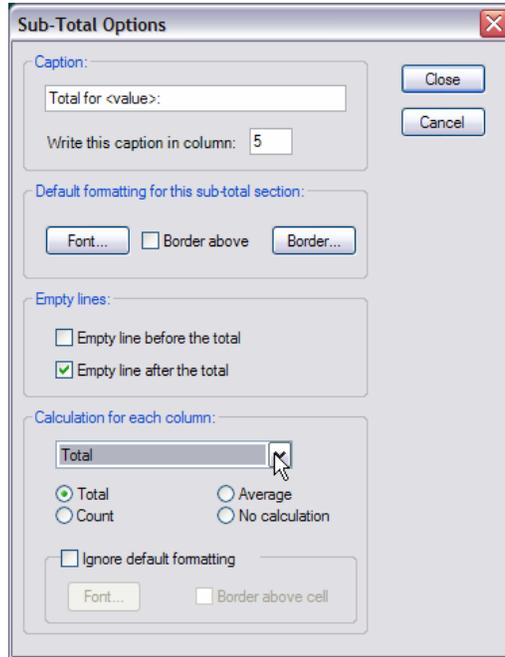
You may add a title before each section. Usually you will want the title to be the value of the field. That way every time that the value of the field changes, you new section will clearly be identified with the new value.

The <value> keyword will be replaced by the real value of the field. You may use it with other characters as in: <value>'s territory, for instance.

To apply formatting to the titles, click the *Font...* button.

Each section may have a sub-total as well. The sub-total may be below the section or above the section (this latest option is not compatible with a title). To define your sub-total, click the *Options...* button to open the *Sub-Total Options* window.

To define which column should have a calculation, select the column in the *Calculation for each column* dropdown list, then choose either *Total*, *Count*, *Average* or *No calculation*. You may have one calculation per column.



If you want to apply special formatting to the total of a specific column to make it stand out, while the field column is selected in the dropdown, check *Ignore default formatting* and define the desired formatting by clicking the *Font...* button.

4. Summary

The summary section includes totals for the data included in the whole report. The options are the same as for the sub-totals.

5. Example

Here is an example of a report with a 1st section based on the Stage field with a section Title (in red) a Sub-total (in Brown) and a Summary (in blue).

	B	C	D	E	F
1	Opportunities by Stage				
2					
3	Record Manager	Company	Total	W'ted Total	
4					
5	1. Initial Communication Sales				
6	Chris Huffman	Brandee's Bakery	647.35	647.35	
7	Sarah Whiting	KKQS Radio	809.10	809.10	
8			1,456.45	1,456.45	
9					
10	Total Sales:		1,456.45	1,456.45	
11					

Formatting the Template (Excel Report only)

Each Excel report is associated with a template. The use of a template allows to define the look of your report once and for all, so that you can generate formatted reports without reformatting the report each time after the data is imported.

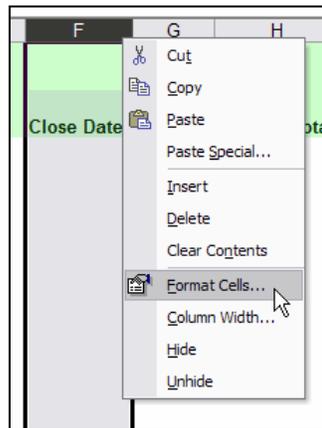
A blank template is automatically created when creating a new report. To edit it, right-click the report name and choose *Edit Template...* in the popup menu. Or choose *Edit Template...* from the *Report* menu. The add-on will open the template in Excel.

1. Creating the header

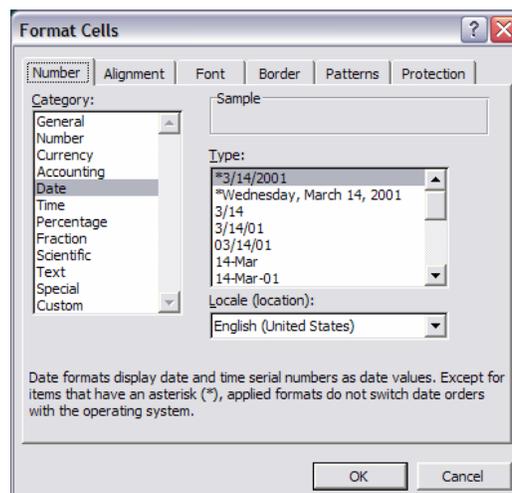
The first thing you will want to do is create the header (rows 1 to 3 in the example above). Remember that data is inserted in the template starting at the cell specified in the *Report Settings* window under the *Data* tab and that this *Top Left Cell* should be below the last row of your header.

2. Formatting the columns

Then format each column as required: for instance if a column is to contain dates, you will need to select the column, right-click it and choose *Format cells...*



In the *Format Cells* window, select *Date* under *Category*. Then pick the format you prefer under *Type*.



You will want to repeat the same process for each column containing dates or numbers or currencies so that proper formatting is used when rendering the report.

NOTE:

Once again, the formatting of the title, sub-total and summary sections is not controlled by the template but defined in the Report Settings window (see above).

3. Collapsing columns

If you look at the reports supplied with the add-on, you will see that we sometimes collapsed the first column to 1 pixel, so that it does not take any space but allows the content (ie. the section titles) to spread over the next cell. This way the title which is in the first column appears to be on top of the second column.

4. Other document settings

You may also create a footer, define print areas and any other Excel document settings.

Duplicating an existing report

To duplicate an existing report, select the report you want to duplicate, then do a right-click and select *Duplicate Report...* or go to the *Report* menu and choose *Duplicate report...*

Editing an existing report

There are 2 levels of editing possible.

To edit the content of the report itself (and the formatting of titles, sub-totals and summary), select the report, right-click and choose *Edit Settings...* or go to the *Report* menu and choose *Edit Settings...* For explanations on the different screens of the *Report Settings* window, see *Defining the report settings* under *Generating report* previously in this document.

To edit the columns formatting, header, footer or any settings associated with the Excel document itself, select the report, right-click and choose *Edit Template...* or go to the *Report* menu and choose *Edit Template...* The add-on will then open the template in Excel in edit mode.

Changing the template folder/Sharing your templates over a network

By default, the template folder is located on your hard drive under the Exponencial\Advanced Sales Lookup, Export and Reports folder located under the ACT! Plugins folder (by default at c:\Program Files\ACT\ACT for Win 7\Plugins).

If you wish to change this location, to share the templates over a network for instance, go to the *Options > Template folder...* menu and choose the new location.

Note that all the files under the template folders are necessary. So if you want to move your templates to another location you need to copy all the files, ie. *Report_Name.XLT* and *Report_Name.WXL* for Excel Reports and *Report_Name.WCS* for CSV reports.

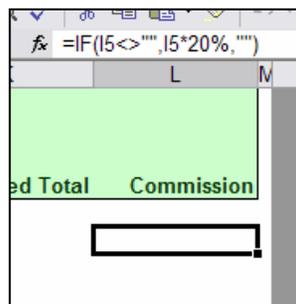
Advanced Techniques: Explanation of the Commission Report

In some cases, you might want to have calculations to be run once the data is imported into Excel. For instance, you might want to calculate a 20% commission based on the *Total* sales amount. That's what the Commission Report does (see below the commission figures in blue).

Qty	Total	Prob.	W'ted Total	Commission
150.00	9,750.31	25%	243758%	1,950.06
280.00	9,750.31	25%	243758%	1,950.06
	19,500.62		487515%	3,900.12

At this stage, you might want to open the Commission Report template: select the report, then do a right-click and choose *Edit template...*

As you can see, we duplicated the *Opportunities by company* report and added an extra column in the template, called *Commission*. If you look into cell L5, which corresponds to the row where the data will be inserted (If you look at the report settings, you will see that the Top Left Cell is A5), you will see the formula: `=IF(I5<>"",I5*20%,"")`.



The reason the final report displays the commission at the end of each row is that this cell is automatically copied at the end of each data row.

That's because this cell is:

1. on the row where the data is inserted (the row of the *Top Left Cell* setting)
2. to the right of where the data will be inserted

Any cell meeting these 2 conditions will automatically be copied at the end of each data row as well. So you can have more than one additional column to do after-import calculations.

NOTES:

- We used the if function to only calculate the commission when the I column (the Total amount in \$) contains a value. This way we avoided created cells with zeros as in:

150.00	9,750.31	25%	243758%	1,950.06
280.00	9,750.31	25%	243758%	1,950.06
	19,500.62		487515%	3,900.12
				0.00
				0.00

- To ensure that the report still looks great, borders are automatically extended to the extra columns.

Registering your product

To continue using this product passed the trial period, please buy a license at www.exponencial.com. Licenses are issued for one ACT! username and will only work for that username.

Once you get a license code, right-click one of the controls of the pack in your layout and select *About..* Once the *About* screen is open, type the registration code in the appropriate box and click OK. You might need to close and restart ACT! to complete the registration process.

Support

For support, contact support@exponencial.com.