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## 1 System requirements

- Act! 7 and higher
- Requires **Act! +** (this contains the crucial interface **ActRemote** and **BrowserTab**)
- Windows XP / Windows Vista / Windows 7

## 2 Performance attributes of CustomInfo

**CustomInfo** has the following distinctive performance attributes:

For a comprehensive analysis of an Act! contact record or company/group record, additional information from other sources (eg. procurement or accounting data) and internal Act! data can be queried via the contacts/companies or groups record and displayed in the Act! screen.

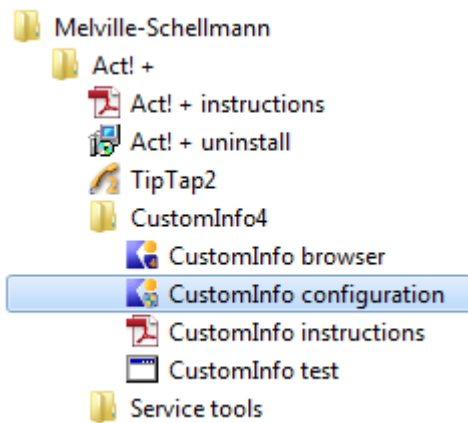
- The system allows the integration of many different data sources (eg. Excel, Access, SQL databases, and especially other Act! databases).
- The integration of information to be displayed is performed via SQL queries and can be extended as required.
- The display of the information shown is integrated into an Act! tab.

## 3 CustomInfo – installation

**CustomInfo** is installed as part of the Act! + installation process. Please see the Act! + documentation for information on installation. Please note that if you perform a Custom installation it is possible to enable/disable the CustomInfo feature.

## 4 CustomInfo configuration

Once the installation has completed, you will now have a new entry in the Windows Start menu. In order to configure **CustomInfo**, please go to the Start menu and go to **Start → All Programs → Melville\_Schellmann → Act! + → CustomInfo4 → CustomInfo configuration**



### 4.1 Terminology used in the CustomInfo configuration

#### 4.1.1 Rubric

The Rubric entries stored here will later represent the various “theme areas” (such as sales data, document information, outstanding items, etc.). To this end, every Rubric created here is displayed in the final view with its own tab in **CustomInfo**.

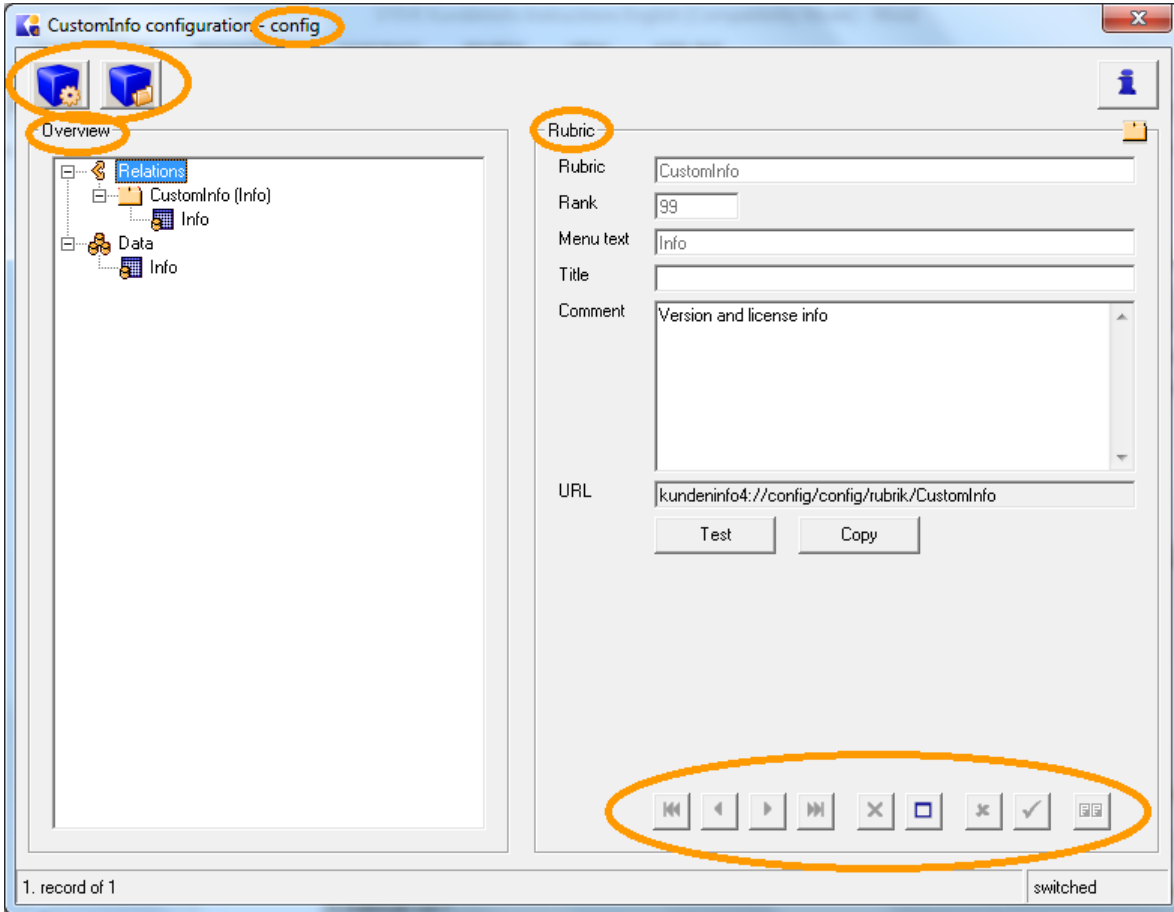
#### 4.1.2 Data

Every data entry created here represents an SQL query on a data source you specify. You can compose any number of SQL query data entries, each of which can reference different data sources.

#### 4.1.3 Relations

Here the stored data entries in the areas “Rubric” and “Data” are cross-referenced. Several data entries can be assigned to the same Rubric entry.

## 4.2 Main configuration screen for CustomInfo



### Overview (left side)

Shows all rubrics and all data created in the configuration. Clicking on a rubric in this section (such as the CustomInfo rubric in the screenshot above) will display the details on the right hand side. Clicking on a set of Data (such as Info that you can see beneath Data above) will display that data set on the right instead.

### Main node "Relations"

Shows all the rubrics and the assigned data in each case

### Main node "Data"

Displays the list of all data

### Rubric (right side)

Data entry of rubrics or data

### "New configuration" icon (top icon on left)

Creates new or replaces existing configurations.

### "Select configuration" (top icon on right)

This icon allows you to open other configurations.

### Configuration in the window title bar

The name of the current configuration appears (after the hyphen) in the title bar of the configuration screen.

### Navigation buttons (bottom right)









These are used to save, create and delete headings and data entries (see 4.3)

### 4.3 Navigation buttons

In the bottom right of the configuration screen you will find navigation buttons for editing existing records or creating new ones (headings/data).



These buttons have the following actions:

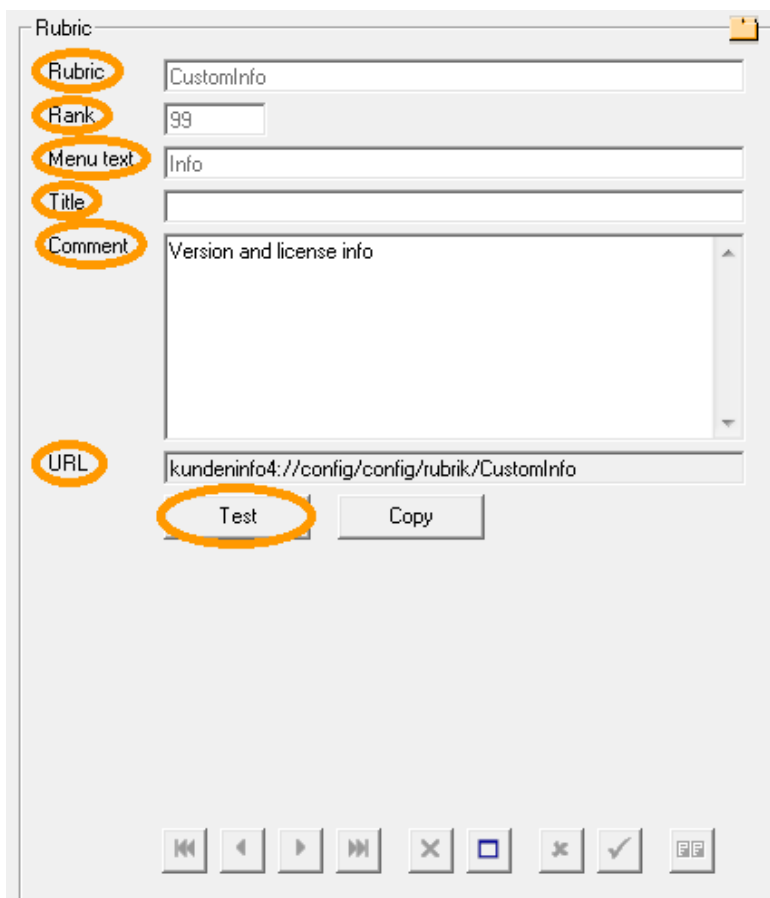
	Skip back to first record
	Go back one record
	Go forward one record
	Skip forward to the last record
	Delete current record
	Create new record
	Cancel current editing of record
	Save current record

## 4.4 Input screens

You can use the input screens to create new data entries (or edit existing ones) for rubrics or data. It is not possible to change the rubric "CustomInfo" and the data "Info".

### 4.4.1 Input screen for Rubrics

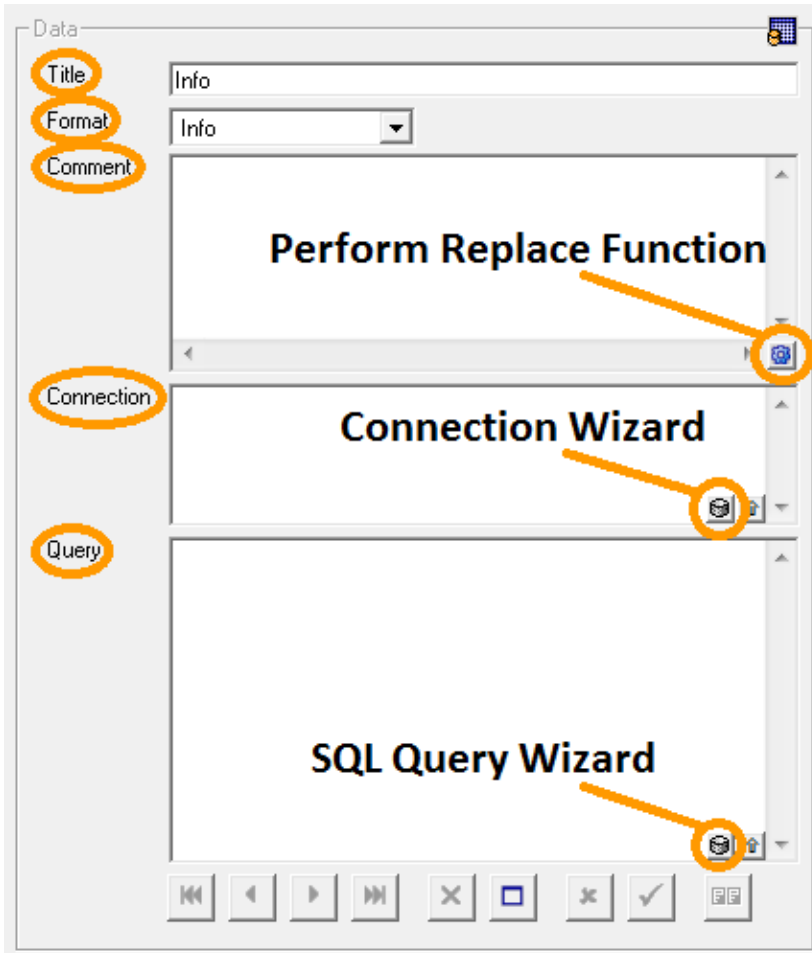
Clicking on a rubric entry displays the input screen on the right hand side. This then allows your rubric entries to be edited.



- **Rubric:** The term you enter here must be distinctive and is used to organize several records.
- **Rank:** Only contains whole numbers and is used to sort the rubrics in the overview (see 4.5.6)
- **Menu text:** The term you enter here appears later as the title for your rubric.
- **Title:** When the rubric is activated, the title is displayed as a banner for the displayed data.
- **Comment:** The comment is also displayed as a type of sub-title.
- **URL:** This URL can be used to serve (for example) as an initial URL in the "BrowserTab" function of Act! + (see 4.7.8)
- **Test:** Opens the URL in a separate Internet Explorer window, in order to display the heading with its data.

#### 4.4.2 Input screen for data

Clicking on Data entries in the Overview section will open up the input screen for that data set on the right hand side, allowing you to edit your data:

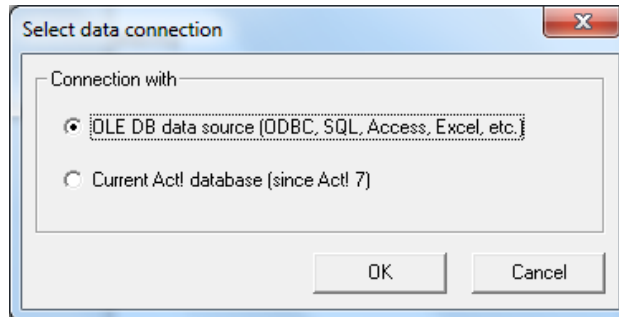


- **Title:** You must enter a distinctive title here.
- **Format:** Selection of different display formats.
  - Standard displays the values in a simple table form.
  - Hierarchic is intended for experienced users who want to embed “nested queries” (known as shape queries) into a hierarchical structure.
  - List only shows the first record found and spreads the displayed values over a maximum of three columns. This format type is used, for example, if a client’s contract data is to be displayed and it would not make sense to display it in just a single line.
  - Info displays the program information via **CustomInfo** and is of no of further interest in this context.
- **Comment:** A comment is not actually displayed, but this helps you keep an overview of the different SQL queries. In this field there is a special function: the “replace” command.
- **Perform Replace Function:** Clicking on this icon searches the contents of “Comment” and performs any search and replace function specified. For example:

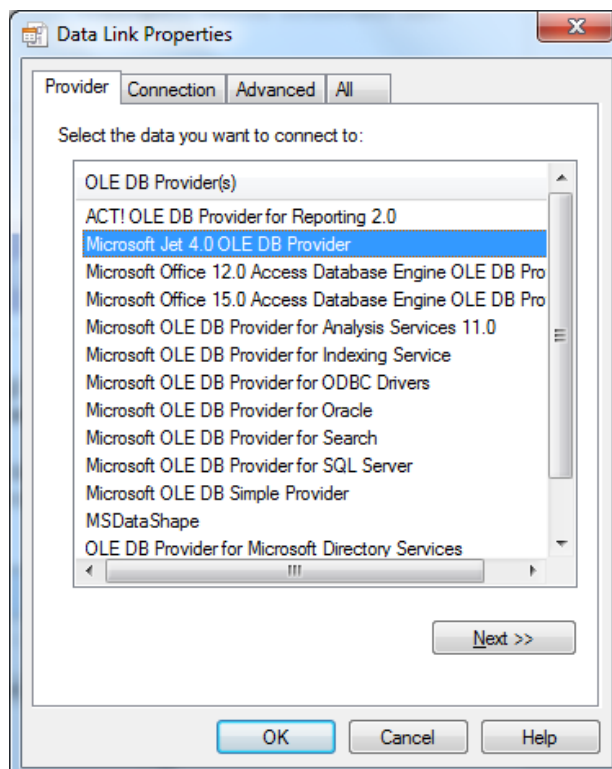
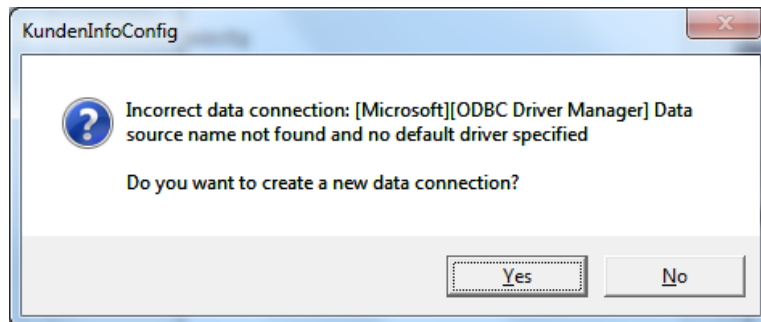
```
replace ( T1754; Q540)
```

In the existing SQL query and connection string, the value T1754 is replaced with Q540.

- **Connection:** Contains the information (connection string) to set up a connection to a data source. For an example of how to do this, see <http://www.connectionstrings.com>
- **Connection Wizard:** Clicking on this icon enables you to either call up the Windows OLE DB connection manager or insert a connection string for the database running under the Act! application.

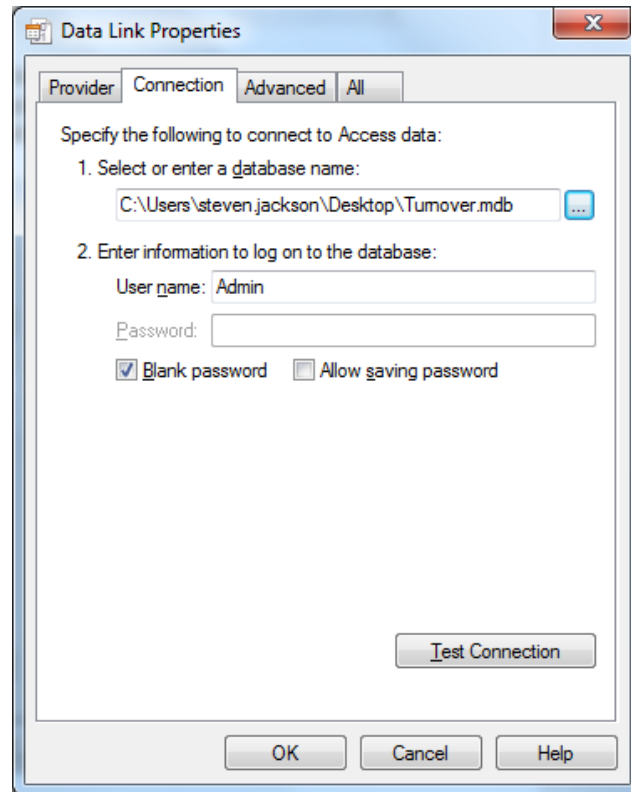


If you choose the option "OLE DB data source", the standard Windows OLE DB connection manager is displayed (this may be preceded by an initial warning, screenshot included below):



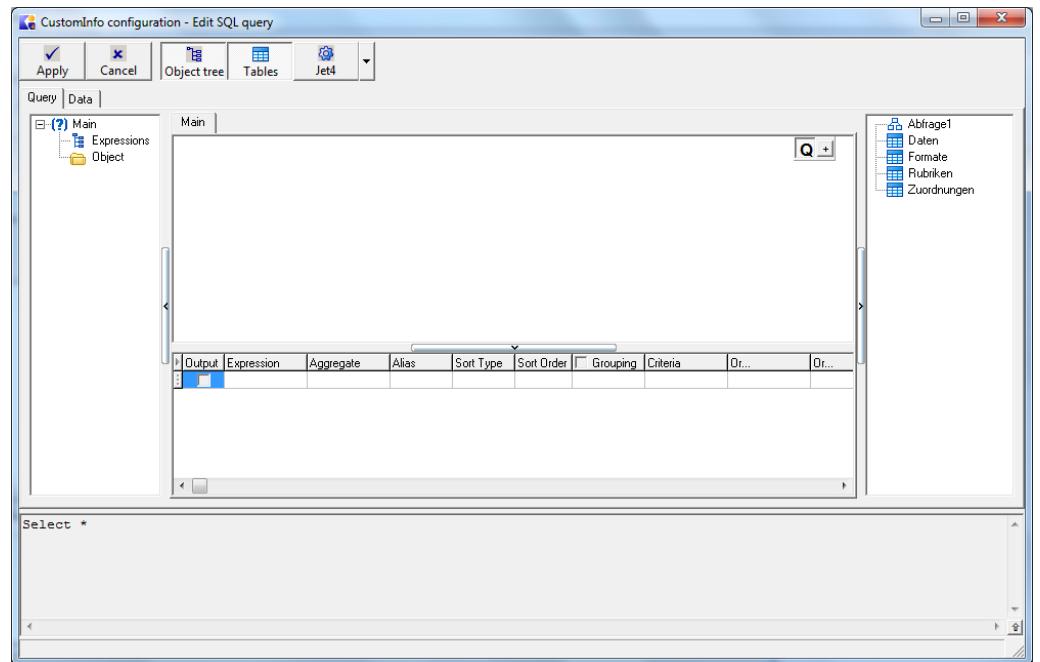


Depending on the database provider selected, the connection data may need to be filled in on the next tabs. In the example below, the Jet 4.0 Provider is used for access to a Microsoft Access database.



The "Test Connection" button lets you test the connection to see whether the access to the data source specified is functioning correctly. Click on "OK" to copy the connection string you created into the data entry window.

- **Query:** Here you enter the SQL query that specifies which data in the data source (see Connection) are to be searched and then formatted and displayed by **CustomInfo**.
- **SQL Query Wizard:** Click on this button to call up the SQL assistant. Its graphic user interface makes it easy to create or edit complex SQL queries using your mouse.



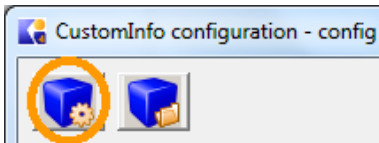
To copy the finished query into the input screen, click the **Apply** button at the top left.

## 4.5 Performing tasks in the configuration screen

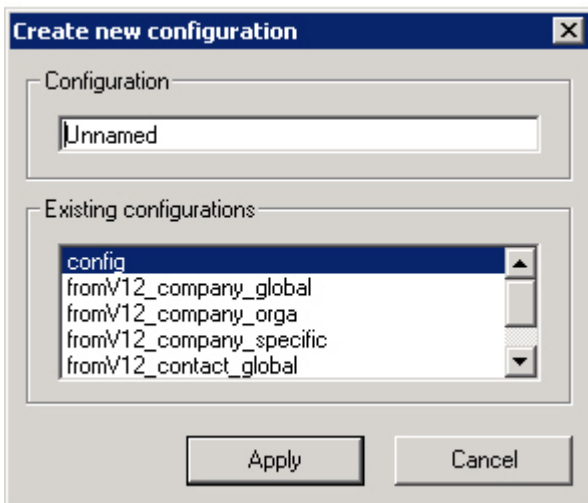
In what follows we describe the various tasks you can perform using the **CustomInfo** configuration screen.

### 4.5.1 Create new configuration or edit an existing one

Click on the **New Configuration** icon for a new configuration.



In the next popup screen you enter a name for the new configuration.

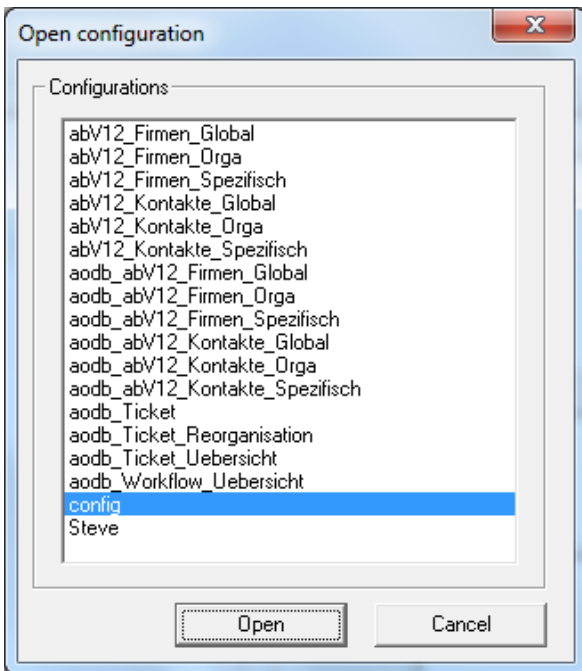


Special characters such as \*? \ cannot be used in the name of the configuration file. The configuration files are stored in the subfolder "databases" in the **CustomInfo** installation folder. Click on the **Apply** button to create a new configuration or overwrite an existing one, and open it for editing. The configuration "config" must always be present.

To edit an existing configuration, click on the **Open existing** button.

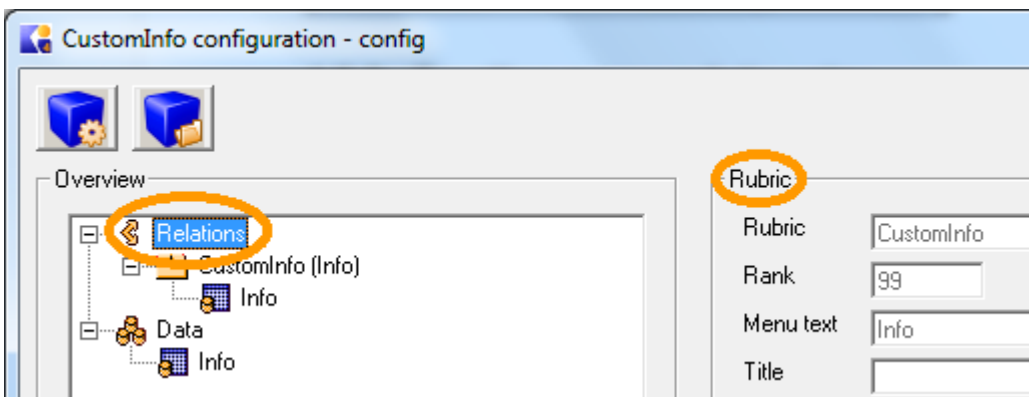


A popup window displays a selection of existing configurations.

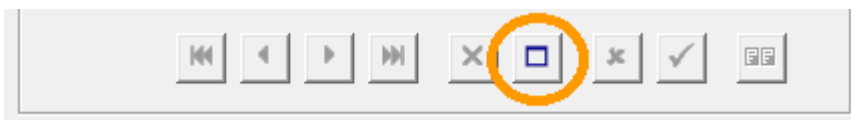


#### 4.5.2 Creating a new rubric entry

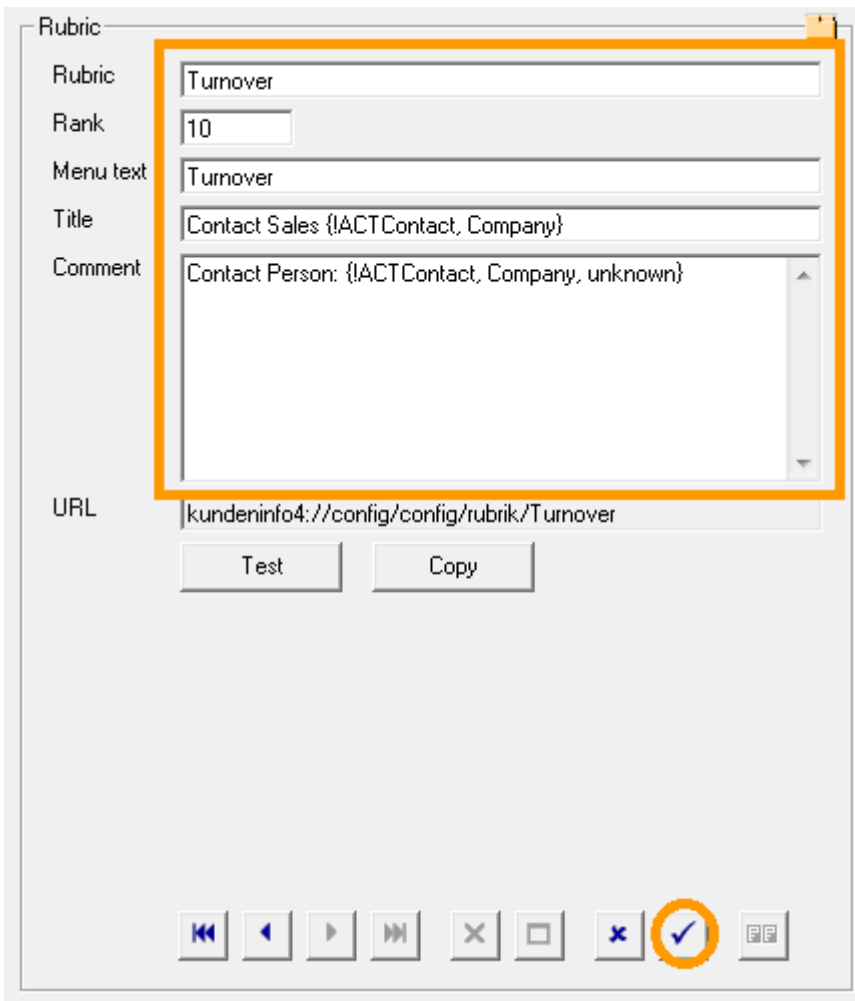
To create a new rubric using the navigation buttons (see 4.3) choose the node **Relations** in the overview.



On the right hand side the input window for heading entries appears. Now you can create a new heading entry using the navigation bar.



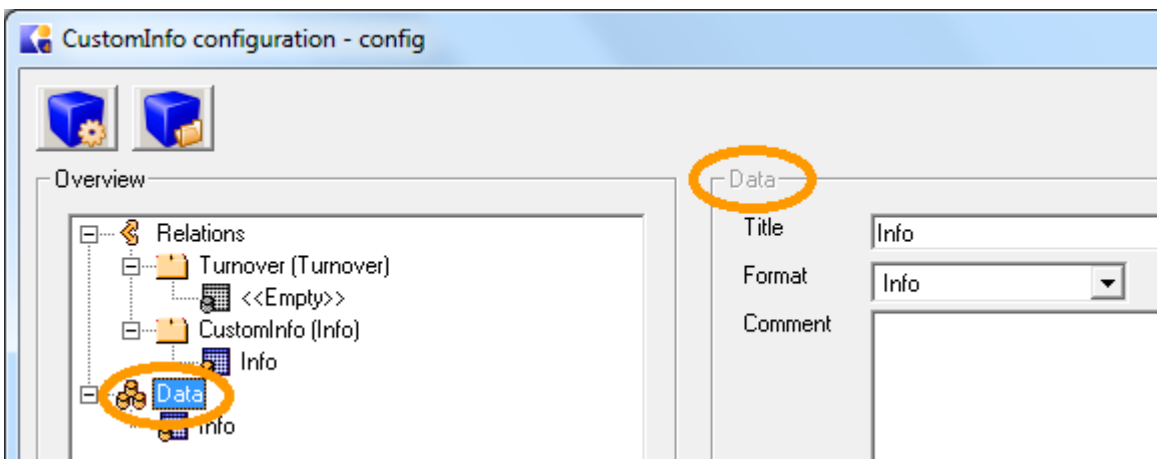
Then you can fill out the fields for the entry. Once you've done this, click on the **Tick** button to save the heading as per the below:



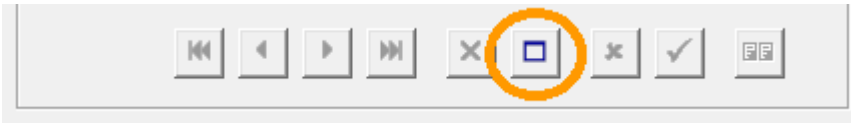
In this example, placeholders were used in the title and description for the contents of Act! fields in the current Act! contact (see 4.6).

### 4.5.3 Creating a new data entry

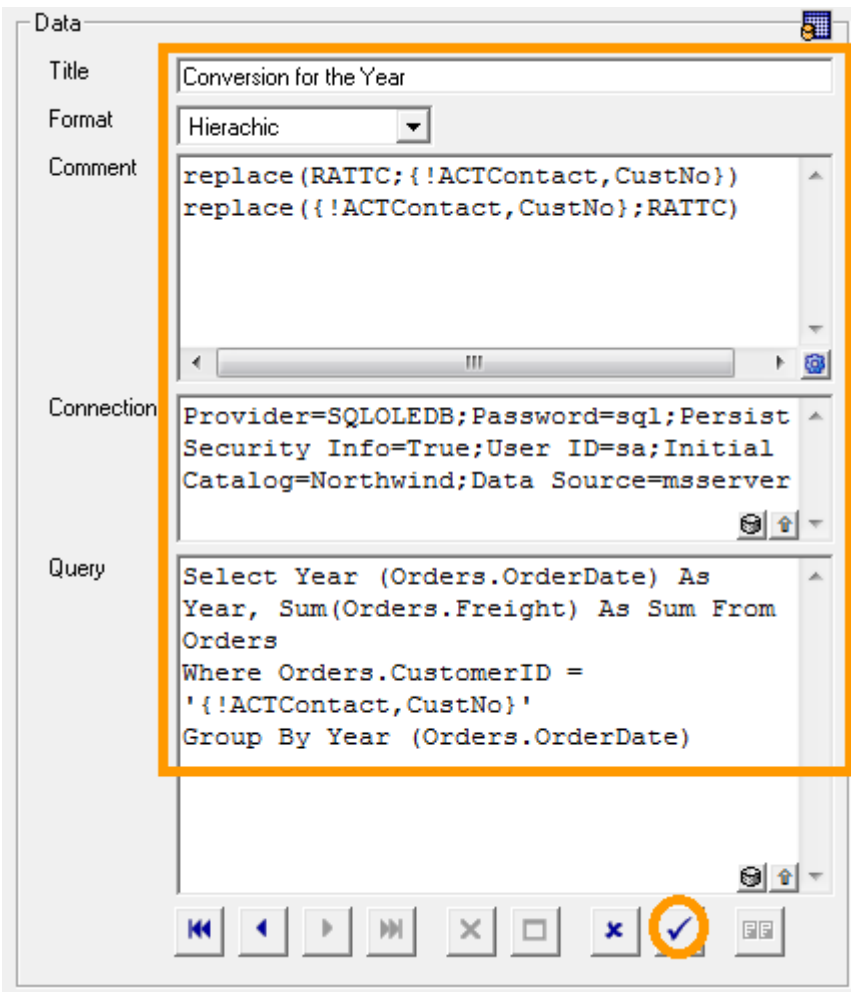
To create a new data entry, select the **Data** node in the overview.



On the right hand side the input window for data entries appears. Now you can create a new data entry using the navigation bar.



Then you can fill out the fields for the entry. Once you've done this, click on the **Tick** button to save the heading.



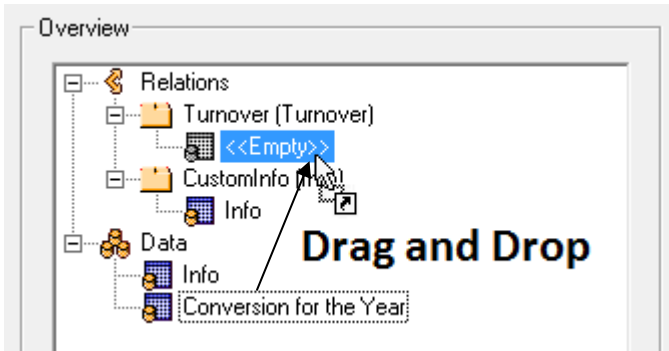
In this example a placeholder `{!ACTContact,CustNo}` was used as a criterion for the WHERE part of the SQL query.

The effect of this is that before the query is performed, the placeholder with the customer number (Field name CustNo) from the current Act! contact is inserted in the SQL query (see 4.6).

Using the Replace functions in the comment, the placeholder in their SQL query can quickly be replaced by a customer number (here RATTC) in order to edit and test the query in the SQL assistant (see 4.4.2).

#### 4.5.4 Create assignments between headings and data entries

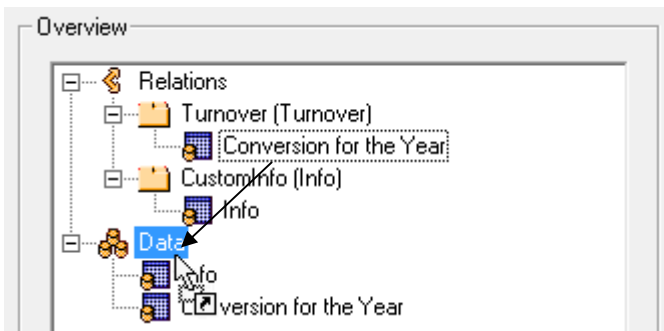
In the overview you can use the left mouse button to drag & drop the data entries under the "Data" node and assign them to a rubric entry.



Several data entries can be assigned to the same rubric. You can also use the drag & drop function to change the order of data entries within the rubric.

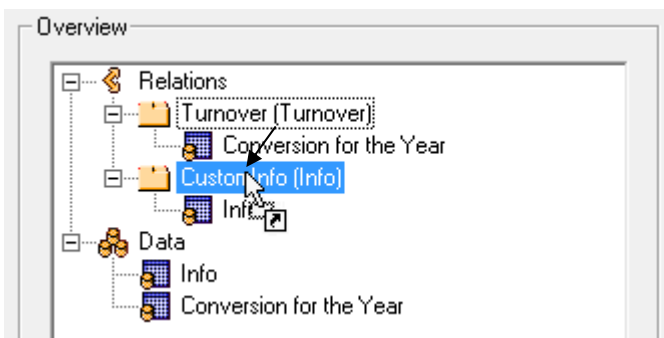
#### 4.5.5 Remove assignments

To remove a data entry from a rubric, drag and drop it to the "Data" node.



#### 4.5.6 Change rubric order

You can also use the drag & drop function to change the order of heading entries.



## 4.5.7 Edit existing entries

In the overview you can select heading and data entries with a simple mouse click and then edit them on the right-hand side in an input window. To save the changes, click on the **Tick** icon in the navigation bar.



## 4.6 Using placeholders

You can use placeholders to embed dynamic data in various areas of the configuration entries. When the **CustomInfo** views are subsequently displayed, the placeholders are replaced with the appropriate data. Placeholders can be used in the following fields of a heading entry:

- Title
- Comment

With data entries, the fields are:

- Connection
- Query

Placeholders always have the following format:

```
{!<DataCommand> , <Parameter1> , <Parameter2> }
```

Not all data commands have parameters.

### 4.6.1 Placeholders for Act! fields

To use the contents of Act! fields, the placeholder syntax is as follows:

```
{!ACT<DataArea> , <Act! Fieldname> , <Value, if Field is empty> }
```

The values used for the data area include: contact, company or group. The second parameter is optional. If you enter text here, it is only used if the specified Act! field is empty. For example:

```
{!ACTContact , Address 1 , unknown }
```

This means: you want to see the contents of the field "Address 1" in the Act! contact. If this field is empty, the word "unknown" is used.

For example, if in the case of an SQL query you want to have the customer number of the current company record from Act! in the WHERE part of the data entry, you need to change your SQL query from:

```
SELECT . . . WHERE Turnover.Customernumber = 'D123456'
```

to:

```
SELECT . . . WHERE Turnover.Customernumber = '{!ACTCompany , CustNo}'
```

The best way of finding the field name of the Act! field you used is to click the right mouse button on the field in question. This will show a menu including the option "Lookup <Field Name>".

To get the GUID (unique ID of a record) of an Act! record, you can use GUID as the field name. Example:

```
{!ACTGroup , GUID }
```

Gives the GUID of the current group record in the current Act! application.



## 4.6.2 Other placeholders

{!ACT7SQLConnectionString}

Gives the connection string for the current database opened under the Act! application (see 4.4.2)

{!ACTCurrentUser}

Produces the name of the current user logged into the Act! program. If inserted in the WHERE part of an SQL query, the display of data depends on the current Act! user. For example:

```
SELECT . . . WHERE '{!ACTCurrentUser}' = 'Chris Huffman'
```

{!ACTCurrentUserID}

Gives the GUID of the current Act! user. If inserted in the WHERE part of an SQL query, the display of data depends on the current Act! user. For example:

```
SELECT . . . WHERE '{!ACTCurrentUserID}' = 'b4326794-233a-420b-b157-9559efb9e025'
```

{!ACTCurrentUserRole}

Gives the name of the role (security level) allocated to the current Act! user. If inserted in the WHERE part of an SQL query, the display of data depends on the current Act! user and their role. For example:

```
SELECT . . . WHERE '{!ACTCurrentUserRole}' = 'Administrator'
```

{!ACTCurrentUserRoleID}

Gives the GUID of the role (security level) allocated to the current Act! user. If inserted in the WHERE part of an SQL query, the display of data depends on the role of the current Act! user. For example:

```
SELECT . . . WHERE '{!ACTCurrentUserRoleID}' = 'dcd9ff3a-117b-4585-932d-03cd56ef10de'
```

The following GUIDs are assigned for Act! roles in an Act! database:

Administrator:	dcd9ff3a-117b-4585-932d-03cd56ef10de
Manager:	bb4bfa48-a9dd-423b-8e8c-21675e7f5d53
Standard:	441ed53a-251e-4452-aca2-dcc61409d91d
Limited:	96de7717-b756-4233-93e9-a9f653a7cf67
Search:	6d2186bc-614d-4461-9d52-5d6de8dfbfb3

```
{!ACTCurrentUserTeams}
```

Gives the name of the user teams to which the current Act! user belongs. If inserted in the WHERE part of an SQL query, the display of data depends on the Act! team. For example:

```
SELECT . . . WHERE CHARINDEX('Sales', '{!ACTCurrentUserTeams}') > 0
```

If, for example, the current Act! user is a member of the teams "Sales" and "Service", the placeholder `{!ACTCurrentUserTeams}` will produce the text "Service;Sales" for him.

```
{!AppData}
```

Gives the current folder for application data of the current Windows user. With connection strings, this can help to dynamically define the path to a data source.

```
{!CommonAppData}
```

Gives the path to the folder where application data are stored independently of the Windows user.

```
{!CurrentUser}
```

Corresponds to the name of the current Windows user.

```
{!ACTCurrentDatabaseFolder}
```

Gives the name of the opened Act! database. This is the folder "<Database name>-database files". With network databases, you get the UNC path to release this folder. If you want to access the templates folder, for example, you need to use the following code:

```
{!ACTCurrentDatabaseFolder}\Templates
```

### 4.6.3 The placeholder RegistryValue

The placeholder RegistryValue is used to save a user-defined value under a given name to be reused under the current user. It uses the following syntax:

```
{!RegistryValue,ValueName,DefaultValue}
```

The value with the name "ValueName" is extracted from the registry key "HKEY\_CURRENT\_USER\Software\Melville-Schellmann\KundenInfo4\Values". Example:

```
{!RegistryValue,Value1,Robert Schellmann}
```

If an entry called "Value1" of the type REG\_SZ is available in the registry "HKEY\_CURRENT\_USER\Software\Melville-Schellmann\KundenInfo4\Values", and it has the value "Peter Lustig", the placeholder produces the name "Peter Lustig". If this value is empty or does not exist, the placeholder gives the default value "Robert Schellmann"

If you are using the placeholder RegistryValue within a rubric, you will find an additional button in the status bar under your data display, called "Parameters".

Colleen McCarthy
Jim Curtis
David Shrute
Print Show Parameters

This button allows the user to change the value for the placeholder in a popup window.

Parameter input

Value1

OK Cancel

Using different prefixes for the ValueName (here: Value1), allows the use of different types of values.

#### 4.6.3.1 Value name prefix text\_

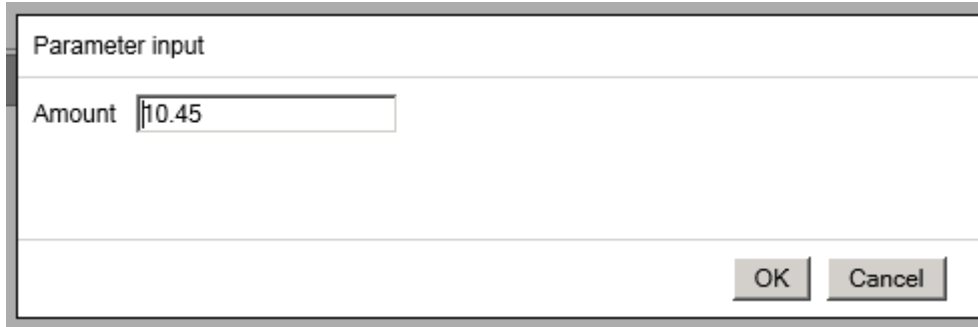
The prefix text\_ is optional, as any value without a prefix will always be treated as text by default.

#### 4.6.3.2 Value name prefix number\_

The value will be treated as a number.

Example:

```
{!RegistryValue,number_Amount,10.45}
```



#### 4.6.3.3 Value name prefix boolean\_

The value will be treated as a boolean value. It will be saved as either true or false and is represented as a checked or unchecked checkbox correspondingly.

Example:

```
{!RegistryValue,boolean_Is_private,true}
```



The placeholder can be used inside a WHERE-clause of an SQL-query using the following example:

```
SELECT ... WHERE IsPrivate =  
CONVERT(bit, '{!RegistryValue,boolean_Is_private,true}')
```

In this example we assume that a Bit-field named "IsPrivate" contains the Boolean value.

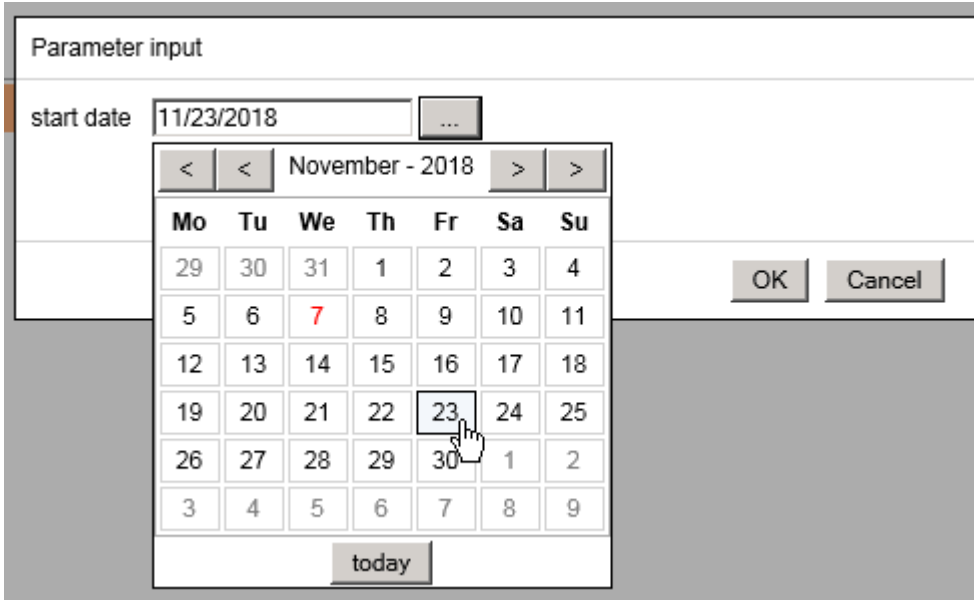
To print the value inside the detail text of a category, use the HTML script tag following this example:

```
<script>if({!RegistryValue,boolean_Is_private,true}==true){document.write('is  
private')}else{document.write('public')}</script>
```

#### 4.6.3.4 Value name prefix date\_

The value will be treated as a date and the date will be saved in ISO-8601-format (YYYY-MM-DDTHH:mm:ss.sssZ). For example, the 23<sup>rd</sup> of November 2018 (local time zone CET / MEZ) would be saved as 2018-11-22T23:00:00.000Z (time zone GMT). Example:

```
{!RegistryValue,date_start_date,today}
```



The DefaultValue today causes the current date to be used until a different date has been selected.

The date value in the placeholder can be used inside a WHERE-clause of an SQL-query using the following CONVERT function:

```
SELECT . . . WHERE CREATEDATE >= CONVERT(Date,
' {!RegistryValue,date_start_date,today}' ,127) > 0
```

The 127 states, that the date to be converted from is formatted as ISO-Format.

To print the value inside the titel or detail text of a category, use the HTML script tag following this example (keep in mind, Java Script is case sensitive):

```
<script>document.write(new
Date(' {!RegistryValue,date_start_date,today}' ).toLocaleDateString())</script>
```

The date will be converted from ISO-8601-Format to local time zone and format.

#### 4.6.3.5 Value name prefix select\_

This prefix allows a list of values to be entered for the DefaultValue. The user can then select a value from a dropdown list. Example:

```
{!RegistryValue,select_Event,info;warning;error}
```



Make sure the values are separated by a semicolon.

Values can be split into a “internal value” and a “display value” by using the |-character (pipe). Example:

```
{!RegistryValue,select_Event,green|info;yellow|warning;red|error}
```

The popup window will be displayed exactly like in the above example, but the value saved will be the color names (“green”, etc) and that value will be applied when using the placeholder.

## 4.7 Formatting commands for displaying values

Certain key words can be used in the alias of columns in an SQL query to adjust the display or formatting of data in this column. For example:

```
SELECT Person AS left_Name, Age AS right_Alter FROM Children
```

The keyword `left_` in the first alias ensures that the values in the column are displayed left aligned. The keyword `right_` provides right-aligned formatting for the second column. The identified keywords are removed for the display, so that the headings of the column read `Name` and `Alter`.

### 4.7.1 Formatting of column data

The following keywords are used to format the displayed data:

```
left_      left aligned (default setting)
right_     right aligned
center_    centered
justify_   justified
```

### 4.7.2 Hide a column

To block the display of a column, use the keyword:

```
hide_
```

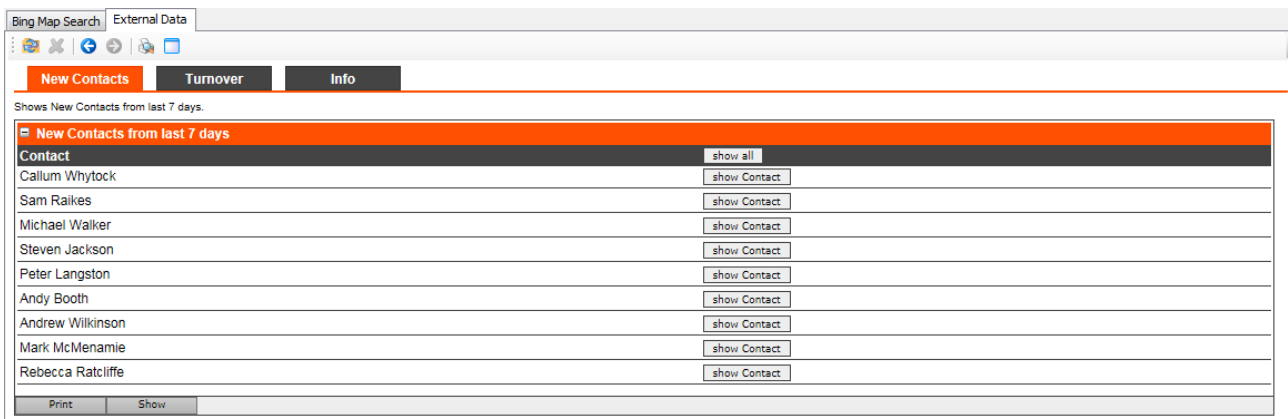
With shape queries, for example, this option can be useful for fields needed for the relation between the two partial queries, as these values are often of no interest to the user viewing the data.

### 4.7.3 Display function of Act! records

If a column in an SQL query provides the GUIDs (unique IDs) of Act! records, these can be reformatted so that an icon appears in the output which can be used to display the Act! record. Example:

```
SELECT FULLNAME As Contact, CONTACTID As ShowACTContact_Contact
FROM TBL_CONTACT
WHERE Datediff(d, CREATEDATE, GetDate()) < 7
```

The SQL query produces all contacts, and their GUID, that were created over the last 7 days. When formatted, the end result looks like this in a **CustomInfo** tab displayed in Act!:



Contact	Show ACT Contact
Callum Whytock	show Contact
Sam Raikes	show Contact
Michael Walker	show Contact
Steven Jackson	show Contact
Peter Langston	show Contact
Andy Booth	show Contact
Andrew Wilkinson	show Contact
Mark McMenamie	show Contact
Rebecca Ratcliffe	show Contact

You can use the following keywords for this:

ShowACTContact_	for GUIDs of contact records
ShowACTCompany_	for GUIDs of company records
ShowACTGroup_	for GUIDs of group records
ShowACTOpportunity_	for GUIDs of opportunities records (Act! 2010 onwards (12.0))

The Lookup functions are helpful for searching one or more records.

Example:

```
Select Top 10 Customer Number As LookupCompanies_CustNo, Sum(Amount) As Turnover
From Invoices Group By Customer Number Order By Sum(Amount) Desc
```

This query finds the top 10 customers with the most sales in the table `Invoices`. The keyword `LookupCompanies_` in the alias for the field `Customer Number` means that **CustomInfo** displays a button labelled "Show Company" instead of the customer number. If you click on the button this initiates a search in Act! that contains all company records whose field contents in the company field `CustNo` start with that customer number. If the search produces only one record, the program immediately switches to the detailed view for that company.

The following keywords can be used for the Lookup function:

<code>LookupContacts_&lt;ACT!-ContactFieldName&gt;</code>	Searches in the contacts of Act!
<code>LookupCompanies_&lt;ACT!-CompanyFieldName&gt;</code>	Searches in the companies of Act!
<code>LookupGroups_&lt;ACT!-GroupFieldName&gt;</code>	Searches in the groups of Act!
<code>LookupOpportunities_&lt;ACT!-OpportunityFieldName&gt;</code>	Searches in the opportunities of Act! (from Act! 2010 onwards (12.0))

Convert rich text into basic text

If the data displayed contains rich text formatting, this can be filtered out using the keyword:

`Rtf2Text_`

to display the text without any formatting.

#### 4.7.4 Formatting of individual fields

To format the values of an individual field, you can use the keyword `format` in the alias name (AS).

Example:

```
SELECT VKTotalReceipts AS [formatCurrency_Turnover] FROM ...
```

Everything between the word `format` and the underscore character (`_`) is designated as a format expression. This can be either a valid designated or user-defined format expression ("Currency" in the example). This can be used to format the following data:

Formatting of	Action
Numbers	Use predefined numeric formats or create your own user-defined numeric formats.
Date/time	Use predefined date/time formats or create your own user-defined date/time formats.



Consecutive numbering for date/time      Use date/time formats or numeric formats.

String      Create your own user-defined character string formats.

If you are formatting a non-localised (-->System settings "Region and language options") numeric string, you should use a user-defined numeric format to ensure you get the required results.

The keyword `format` can also be combined with other key words such as `right_`  
 Example:

```
SELECT VKTotalRecipts AS [right_format#,##0*00;<b>-#,##0*00</b>_Turnover]
FROM...
```

In the column headed `Turnover`, the values are displayed aligned to the right, in the form 1.234,50 in a normal font width. Negative values (format expression after the semicolon) will be formatted in the same way but displayed in bold by the HTML tags (`<b>...</b>`).

### 4.7.5 Formatting of numbers

#### Designated numeric formats (format function)

The following table describes the predefined numeric formats:

Format	Description
<b>General Number</b>	Displays the number without the thousands separator.
<b>Currency</b>	Displays the number with the thousands separator. The number includes two places after the decimal point. The display depends on the system's regional settings.
<b>Fixed</b>	Displays at least one place to the left and two places to the right of the decimal point.
<b>Standard</b>	Displays the number with the thousands separator and with at least one place to the left and two places to the right of the decimal point.
<b>Percent</b>	Displays a number multiplied by 100 and percentage sign (%) appended on the right. The number always has two places after the decimal point.
<b>Scientific</b>	Uses the scientific standard format.
<b>Yes/No</b>	Displays "No" if the number is 0, otherwise "Yes".
<b>True/False</b>	Displays <b>False</b> if the number is 0, otherwise <b>True</b> .
<b>On/Off</b>	Displays "Off" if the number is 0, otherwise "On".

## User-defined numeric formats (format function)

The following table contains the symbols you can use to create user-defined numeric formats:

Symbol	Description
No character	Displays number without any formatting.
(0)	<b>Placeholder for a number.</b> Displays a number or zero. If the expression has a number located in the position where the format string 0 is found, the number is displayed, otherwise a zero is shown. If the number has fewer digits than the zeros contained in the format expression (on both sides of the decimal point), leading or trailing zeros will be displayed. If the number has more places after the decimal point than the number of zeros after the decimal point in the format expression, the number of places after the decimal point are rounded up to the number of zeros. If the number has more places before the decimal point than the number of zeros contained in the format expression, the extra places are displayed without modification.
(#)	Placeholder for a number. Displays a number or is blank. If the expression has a number in the position of the # placeholder in the format string, the number is displayed, otherwise this position is left blank. This symbol behaves like the placeholder 0, but leading or trailing zeros are not displayed if the format expression contains more # placeholders before or after the decimal point than the digits contained in the number.
(*)	Placeholder for decimal points. In many regional configurations, a comma is used for the decimal point, and a full-stop used in others. The placeholder for the decimal point defines how many places will be displayed to the left and right of the decimal point. If the format expression only contains # placeholders to the left of the symbol, any numbers less than one start with a decimal point. If decimal figures are always to be displayed with a leading zero, you need to specify 0 as a placeholder for the first number to the left of the decimal point. The symbol actually used to represent the decimal point depends on the system settings for the numeric format.
(%)	Placeholder for percentage. The expression is multiplied by 100. The percentage sign (%) is inserted at the point where it appears in the format string.
(,)	Thousands separator. In many regional configurations a full-stop is used as a thousands separator, and a comma in others. The separator is used to separate the thousands from the hundreds in numbers with at least four digits. The thousands separator is displayed if the format expression contains the relevant placeholder and this is encircled by number placeholders (0 or #). Two consecutive thousands separators or one thousands separator immediately to the left of the decimal point (even if no places are specified after the decimal point) means that the number will be divided by 1000 and rounded up accordingly. For example, you can use the format string "##0,," to display "100 million" as "100". Figures less than one million will then be displayed as 0. Two consecutive placeholders for the thousands separators that are not immediately to the left of the decimal point are interpreted as normal thousands separators (and displayed as such). The symbol actually used to represent the thousands separator depends on the system settings for the numeric format.
(:)	Time separator. The most common time separator is the colon, although other characters are sometimes used in different regions. The colon separates hours, minutes and seconds when formatting time values. The symbol actually used to display the time depends on the system settings.

- (/) Date separator. Other separators are sometimes used in certain regional settings. The forward slash separates the day, month and year when formatting date values. The symbol actually used to display the date depends on the system settings.
- (E- E+ e- e+)
- Scientific format. If the format expression contains at least one number digit placeholder (**0** or **#**) to the right of the symbol E-, E+, e- or e+, the number is displayed in the scientific format without any exponential, and the letter E or e is inserted between the number and exponent. The number of digit placeholders on the right of the symbol determines the number of places in the exponent. If you use the symbol E- or e-, a minus sign is displayed immediately next to the negative exponent. With E+ or e+, a minus sign is also displayed next to a negative exponent, but the plus sign is also displayed if the exponent is positive.
- + \$ ( )
- Displays a literal character. If you want to display characters other than those specified here, you must place a backward slash (\) in front of the character in question or put the character in quotation marks (" ").
- (\)
- Displays the next character in the string. Many characters in the format expression have a special meaning and can therefore only be displayed as literal characters by placing a backward slash (\) in front of them. The backward slash itself is not displayed. This is equivalent to putting quotation marks around the next character. If you want to actually display a backward slash, you have to double them up (\\). Examples of characters that cannot be displayed as literal characters are the letters used for formatting the date and time (a, c, d, h, m, n, p, q, s, t, w, y, / and :) and the characters used for formatting numbers (#, 0, %, E, e, comma and full-stop) and the strings (@, &, <, > and !).
- ("ABC")
- Displays the string within quotation marks (" "). Before you can enter text from the code into the **Format** string, you need to put quotation marks around it using **Chr(34)** (34 is the ASCII code for quotation marks ("")).

## User-defined numeric format expressions (examples)

Some format expressions for numbers are shown below. (In all examples, we assume that you have selected “Germany” as the regional settings for your system.) The first column contains the format string. The other columns contain the relevant output in the event that the formatted data match the values specified in the column headings.

Format ( <i>Format</i> )	Plus 5	Minus 5	Decimal 0,5	Zero
Zero string (" ")	5	-5	0,5	
0	5	-5	1	
0*00	5,00	-5,00	0,50	
#,##0	5	-5	1	
#,##0*00; ;Null	5,00	-5,00	0,50	zero
#,##0 \E\U\R; (#,##0 \E\U\R)	5 EUR	(5 EUR)	1 EUR	
#,##0*00 \E\U\R; (#,##0*00 \E\U\R)	5,00 EUR	(5,00 EUR)	0,50 EUR	
0%	500%	-500%	50%	
0*00%	500,00%	-500,00%	50,00%	
0*00E+00	5,00E+00	-5,00E+00	5,00E-01	
0*00E-00	5,00E00	-5,00E00	5,00E-01	

### 4.7.6 Formatting of strings (text)

#### User-defined string formats (format function)

You can compose a format expression for strings using the symbols listed in the table below:

Symbol	Description
@	Placeholder for a character. Displays a number or a blank. If the string to be formatted has a character in the position of the @ placeholder in the format string, the character is displayed, otherwise this position is left blank. Placeholders are filled from left to right, as long as there is no exclamation mark (!) in the format string.
&	Placeholder for a character. Displays a number or is nothing. If the string to be formatted has a character in the position of the & placeholder in the format string, the character is displayed, otherwise this position is left blank. Placeholders are filled from right to left, as long as there is no exclamation mark (!) in the format string.
<	Display in lowercase. All characters will be displayed in lowercase.
>	Display in uppercase. All characters will be displayed in uppercase.
!	Placeholders filled from left to right. Reverses the prior setting of right to left.

## 4.7.7 Formatting of date and time

### Designated date and time formats (format function)

The following table contains the names of the predefined date and time formats:

Format	Description
<b>General Date or GeneralDate</b>	Displays a date and/or time. With real figures, the date and time are displayed (e.g. 4.3.93 05:34). If no places after the decimal point are specified, only the date is shown (e.g. 4.3.93). If the value only contains places after the decimal point, only the time is displayed (e.g 05:34). The display of the date and the time depends on the system settings.
<b>Long Date LongDate</b>	Displays a date in the long date format, depending on the system settings.
<b>Medium Date or MediumDate</b>	Displays a date in the medium date format determined by the language version of the host application.
<b>Short Date ShortDate</b>	Displays a date in the short date format, depending on the system settings.
<b>Long Time LongTime</b>	Displays a time as per the setting for the long time format, including hours, minutes and seconds.
<b>Medium Time MediumTime</b>	Displays a time in the 12-hour format with hours, minutes and an AM/PM code.
<b>Short Time ShortTime</b>	Displays a time in the 24-hour format (e.g. 17:45).
<b>LongLocalDate</b>	Same as LongDate, but the date of the UTC time is converted to the local time zone. In Act! databases, date values are stored in UTC time.
<b>MediumLocalDate</b>	Same as MediumDate and converted from UTC time to the local time zone.
<b>ShortLocalDate</b>	Same as ShortDate and converted from UTC time to the local time zone. Example:  <pre>SELECT CREATEDATE AS formatShortLocalDate_CreateDate FROM TBL_CONTACT</pre>
<b>LocalDate</b>	Only UTC time is converted to the local time zone
<b>LongLocalTime</b>	Same as LongTime, but the time of the UTC time is converted to the local time zone.
<b>MediumLocalTime</b>	Same as MediumTime, but the time of the UTC time is converted to the local time zone.
<b>ShortLocalTime</b>	Same as ShortTime, but the time of the UTC time is converted to the local time zone.

## User-defined date and time formats (format function)

The following table contains the symbols used to create user-defined date and time formats:

Symbol	Description
(:)	Time separator. The most common time separator is the colon, although other characters are sometimes used in different regions. The colon separates hours, minutes and seconds when formatting time values. The symbol actually used to display the time depends on the system settings.
(/)	Date separator. Other separators are sometimes used in certain regional settings. The forward slash separates the day, month and year when formatting date values. The symbol actually used to display the date depends on the system settings.
C	Displays a date in the format dddd and the time in the format tttt, in this sequence. If the consecutive number for the date does not have any places after the decimal point, only the date will be displayed. If it only contains places after the decimal point, just the time will be displayed.
D	Displays the day as a number without a leading zero (1 – 31).
Dd	Displays day as a number with a leading zero (01 – 31).
Ddd	Displays day in abbreviated format (Sun – Sat).
dddd	Displays the day with its full name (Sunday – Saturday).
ddddd	Displays a full date (including day, month and year) which is formatted according to the system settings for the short date format. The default setting for the short date format is dd.mm.yy.
dddddd	Displays a full date (including day, month and year) which is formatted according to the system settings for the long date format. The default setting for the long date format is dd.mmmm.yyyy.
aaaa	The same as dddd, but the localised version of the string.
W	Displays the weekday as a number (1 for Sunday and 7 for Saturday).
Ww	Displays the calendar week as a number (1 – 54).
M	Displays the month as a number without a leading zero (1 – 12). If m follows immediately after h or hh, the minute rather than the month will be displayed.
Mm	Displays the month as a number with a leading zero (01 – 12). ). If m follows immediately after h or hh, the minute rather than the month will be displayed..
mmm	Displays the month in abbreviated format (Jan – Dec).
mmmm	Displays the month with its full name (January – December).
oooo	The same as mmmm, but the localised version of the string.
Q	Displays the quarter as a number (1 – 4).
Y	Displays the calendar day as a number (1 – 366).
Yy	Displays the year as two numbers (00 – 99).
Yyyy	Displays the year as numbers (1000 – 9999).

H	Displays the hour as a number with no leading zero (0 – 23).
Hh	Displays the hour as a number with leading zero (00 – 23).
N	Displays the minute as a number with no leading zero (0 – 59).
Nn	Displays the minute as a number with leading zero (00 – 59).
S	Displays the second as a number with no leading zero (0 – 59).
Ss	Displays the second as a number with leading zero (00 – 59).
t t t t t	Displays the full time (including hours, minutes and seconds) using the time separators specified in the systems settings for the time format. A leading zero is displayed if the relevant option is selected and the time is before 10:00. The default setting for the time format is <code>h:mm:ss</code> .
AM/PM	12-hour format displaying AM (in upper case) up to 12 noon and PM (in upper case) from noon to midnight.
am/pm	12-hour format displaying am (in lower case) up to 12 noon and pm (in lower case) from noon to midnight.
A/P	12-hour format displaying A (in upper case) up to 12 noon and P (in upper case) from noon to midnight.
a/p	12-hour format displaying a (in lower case) up to 12 noon and p (in lower case) from noon to midnight
AMPM	12-hour format displaying the AM string defined by the system. The AM string is displayed before noon and the PM string from noon to midnight. AMPM can be lower or upper case – the actual display depends on the system settings. The default setting is AM/PM.

### User-defined date/time format (examples)

The following examples show the user-defined date and time format for 7 December 1958:

Format	Display
d/m/yy	7.12.58
d-mmm	7-Dec
d-mmmm-yy	7-December-58
d. mmmm	7. December
mmm yy	December 58
hh:mm AM/PM	08:50
h:mm:ss a/p	8:50:35 p
h:mm	20:50
h:mm:ss	20:50:35
d/m/yy h:mm	7.12.58 20:50

### 4.7.8 Bar diagram for number columns

Columns containing numbers can optionally display bar diagrams using 2 different parameters.

#### Diagram type

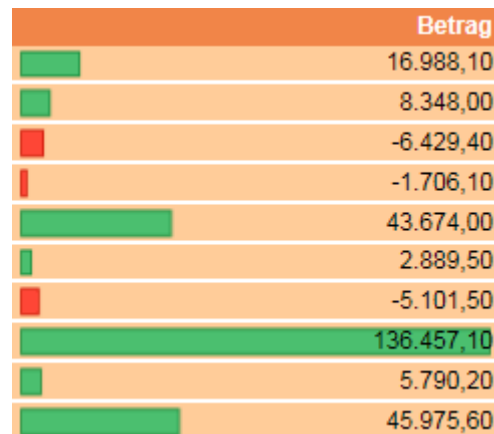
#### Description

##### chartbar1

Draws a horizontal bar representing the value. Positive figures show a green bar, negative ones a red bar.

Example for a column name in an SQL statement:

... As right\_chartbar1\_Betrag, ...



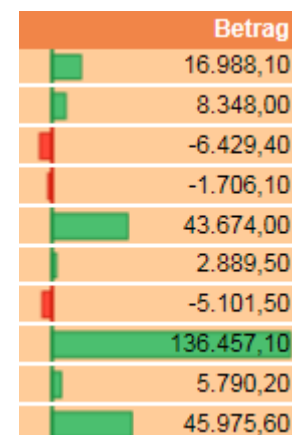
The keyword "right" forces right-justified display for the column "Betrag"(German for amount) (see also 5.7.1).

##### chartbar2

Draws a horizontal bar representing the value. Positive figures show a green bar to the right, negative ones a red bar to the left. A vertical line marks the zero point position.

Example for a column name in an SQL statement:

... As right\_chartbar2\_Betrag, ...

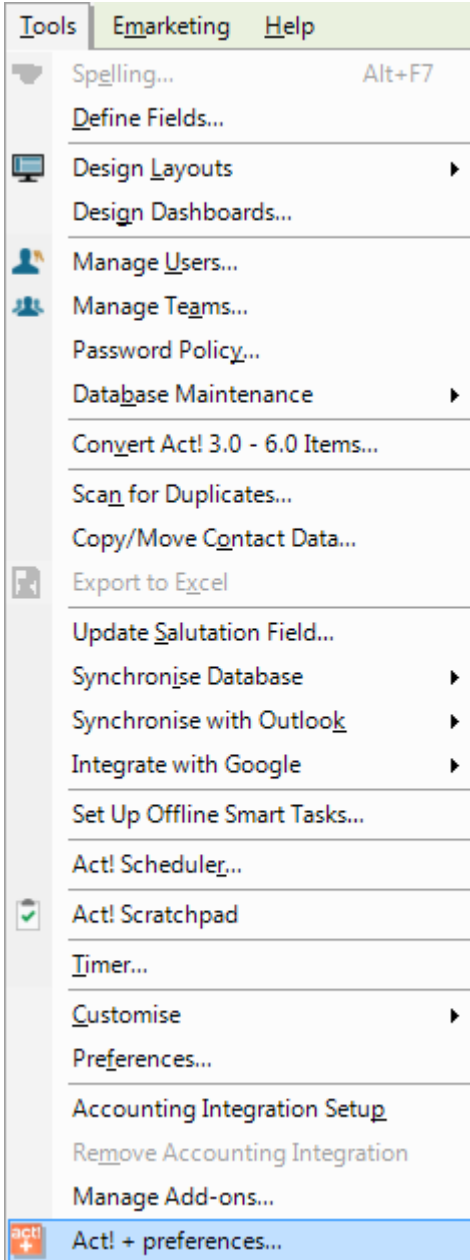


The keyword "right" forces right-justified display for the column "Betrag"(German for amount) (see also 5.7.1).



## 5 Embedding CustomInfo views in Act!

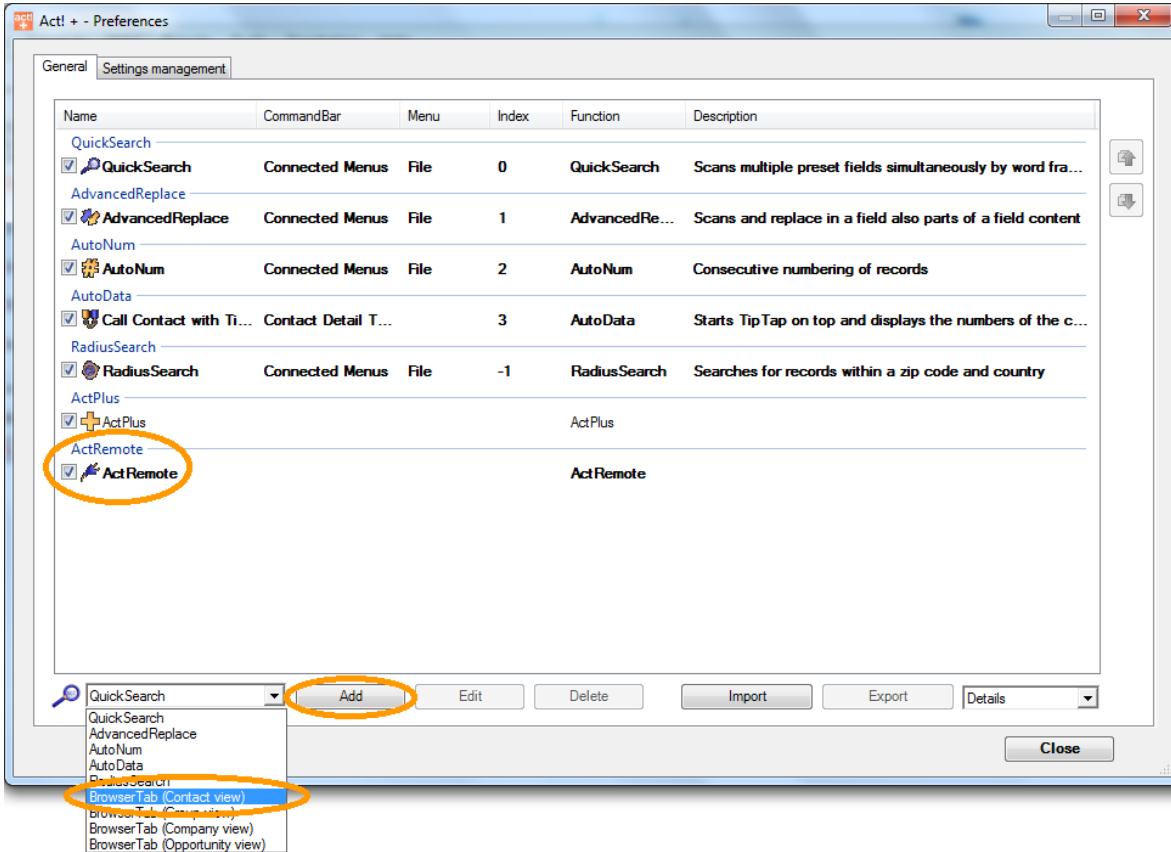
**CustomInfo** views are embedded in Act! using **Act! +**. After you have installed and called up **Act! +**, you will find the menu item for **Act! + preferences...** in the **Tools** menu of the Act! program.



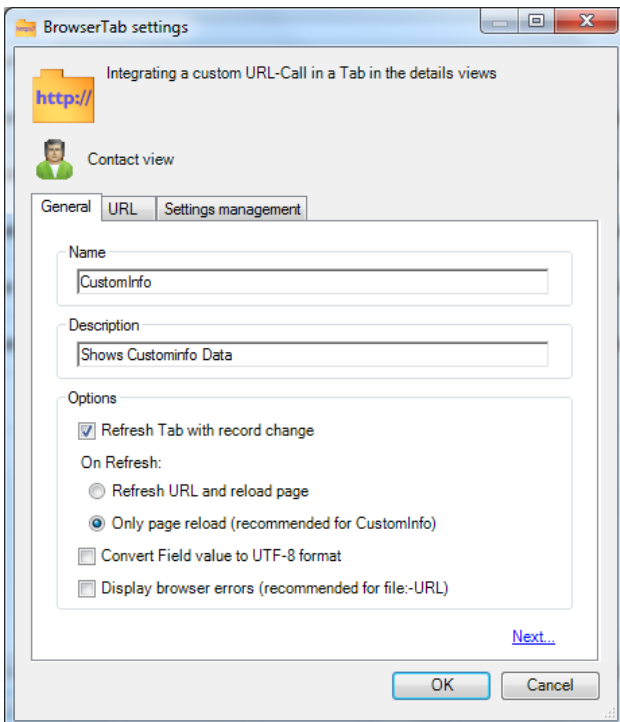
There are two **Act! +** functions that are important for the functionality of **CustomInfo**:

- **ActRemote**
- **BrowserTab.**

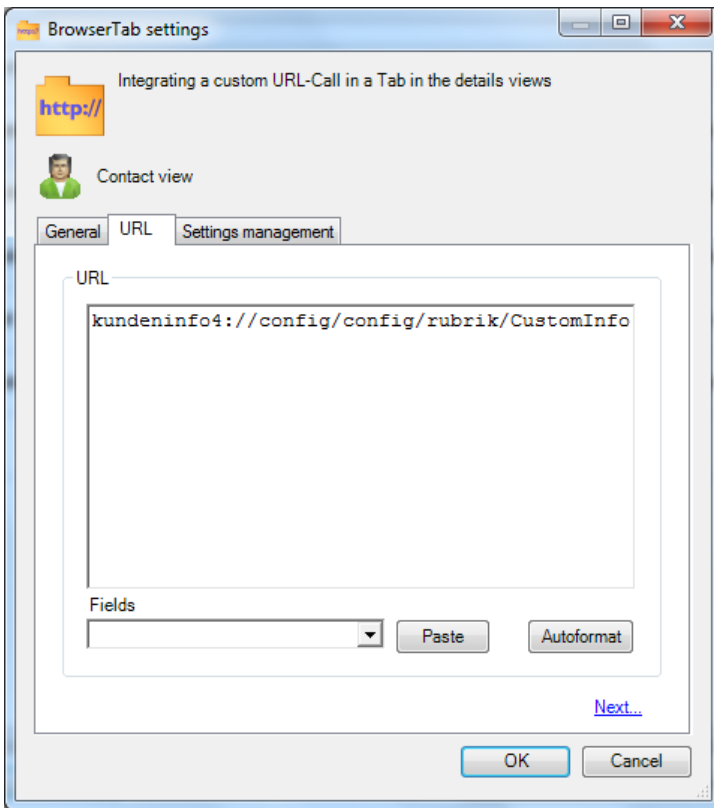
Make sure that **ActRemote** is enabled in the settings. To add a **CustomInfo** view as a tab in the contact details view, select the **BrowserTab (Contact view)** function on the bottom left and add it to the list.



Next, complete the **BrowserTab** settings as follows:



On the second tab, enter the URL for calling up **CustomInfo**.



By configuring **CustomInfo**, you can also display the URL for each heading and copy and paste them here (see 4.4.1).

The general format of the URL is:

```
kundeninfo4://config/<ConfigurationName>/rubrik/<RubricName>
```

Example:

```
kundeninfo4://config/ERPSYSTEM/rubrik/Turnover
```

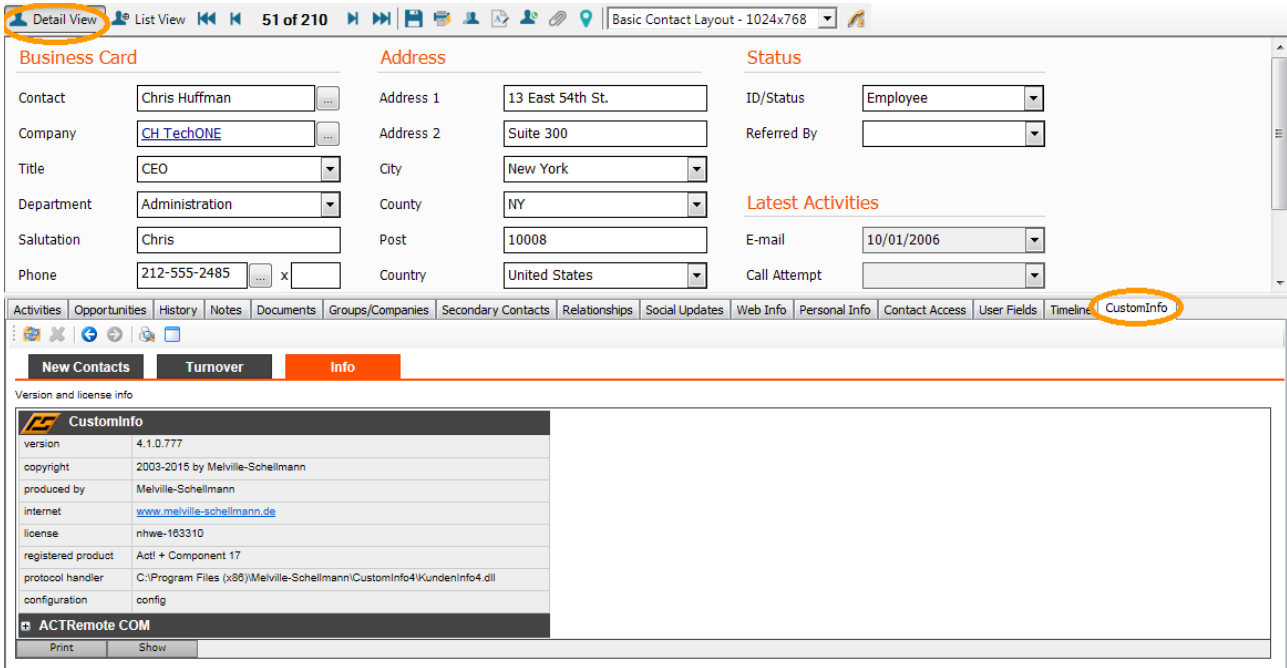
Meaning: From the "ERPSYSTEM" configuration, first display the heading "Turnover".

If you only want to display one tab (rubric), you can do so using the command `rubriconly`.

Example:

```
kundeninfo4://config/ERPSYSTEM/rubriconly/Turnover
```

If you now close the settings dialogue and switch to the contact details view, you will see the new tab "CustomInfo".



The screenshot shows a CRM interface for a contact named Chris Huffman. The interface includes a top navigation bar with tabs like 'Detail View', 'List View', and '51 of 210'. Below this are three main sections: 'Business Card', 'Address', and 'Status'. The 'Business Card' section contains fields for Contact, Company, Title, Department, Salutation, and Phone. The 'Address' section contains fields for Address 1, Address 2, City, County, Post, and Country. The 'Status' section contains fields for ID/Status, Referred By, E-mail, and Call Attempt. Below these sections is a horizontal menu with tabs: 'Activities', 'Opportunities', 'History', 'Notes', 'Documents', 'Groups/Companies', 'Secondary Contacts', 'Relationships', 'Social Updates', 'Web Info', 'Personal Info', 'Contact Access', 'User Fields', 'Timeline', and 'CustomInfo'. The 'CustomInfo' tab is selected and highlighted with a red circle. Below the menu, there are three buttons: 'New Contacts', 'Turnover', and 'Info'. The 'Info' button is highlighted with a red bar. Below the buttons, there is a section titled 'Version and license info' which contains a table with the following data:

CustomInfo	
version	4.1.0.777
copyright	2003-2015 by Melville-Schellmann
produced by	Melville-Schellmann
internet	<a href="http://www.melville-schellmann.de">www.melville-schellmann.de</a>
license	nhwe-183310
registered product	Act! + Component 17
protocol handler	C:\Program Files (x86)\Melville-Schellmann\CustomInfo4\KundenInfo4.dll
configuration	config

At the bottom of the 'Version and license info' section, there is a button labeled 'ACTRemote COM' with 'Print' and 'Show' sub-buttons.

## 6 Importing CustomInfo predefined standard views into Act! +

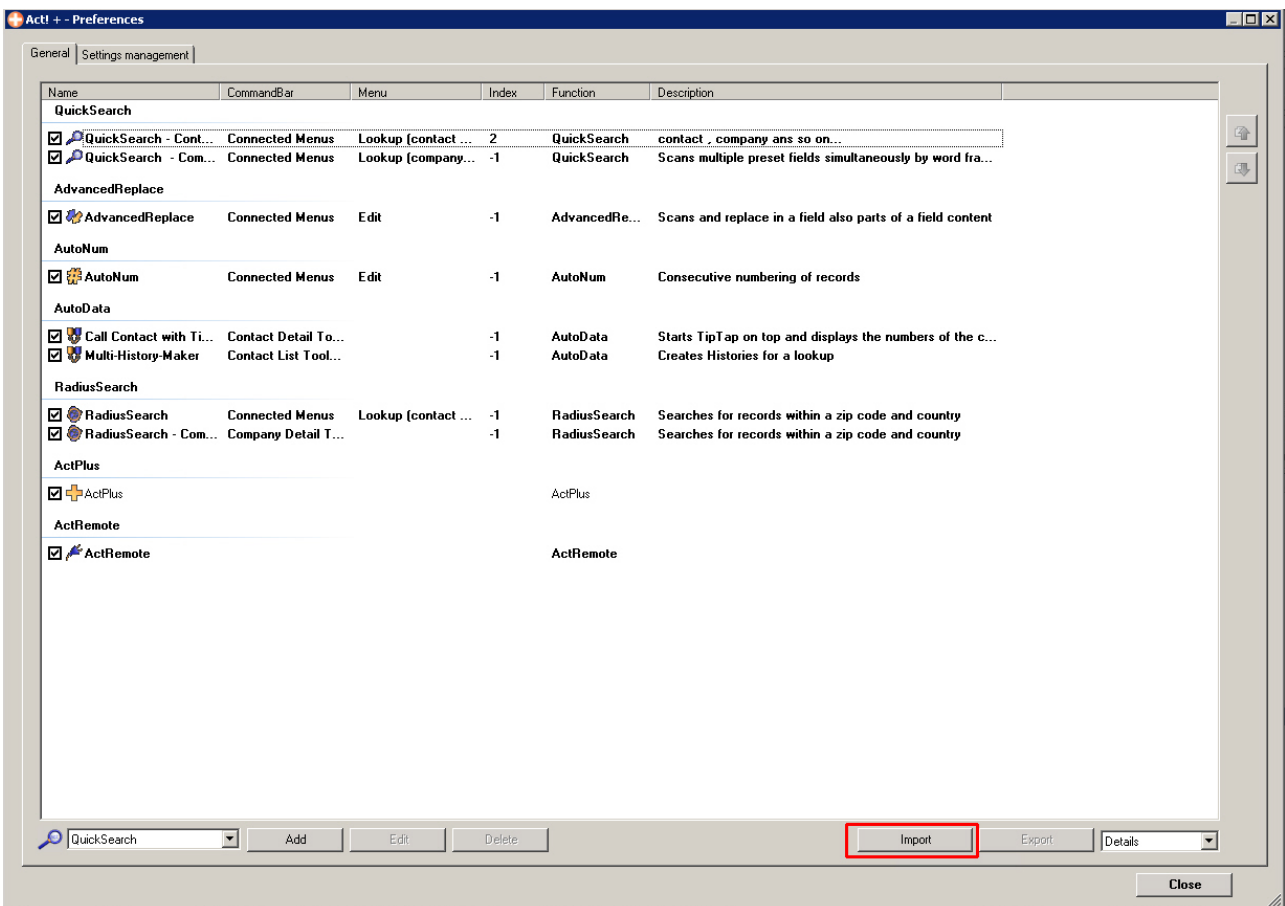
For the ease of use of the query visualizer "CustomInfo" a simple way to activate the standard views was implemented. The contents of these standard views are explained in the next chapter.

The Act! + configuration manager is explained in detail in the separate manual for Act! +.

The folder C:\Program files\Melville-Schellmann\CustomInfo4\Databases contains an XML file (Act! + preferences for CustomInfo views.xml) which will activate the standard views by just importing the file into the Act! + configuration.

### 6.1 Import procedure

Go to "Tools"->"Act!+ preferences" and open the Act! + configuration screen

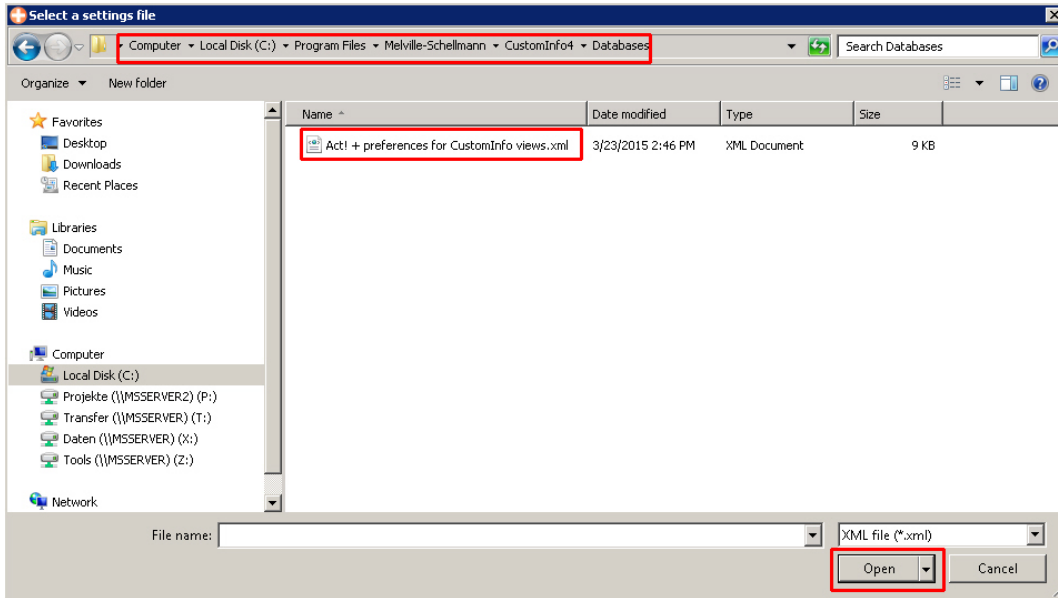


Use the "import" button and browse to the location of the configuration file

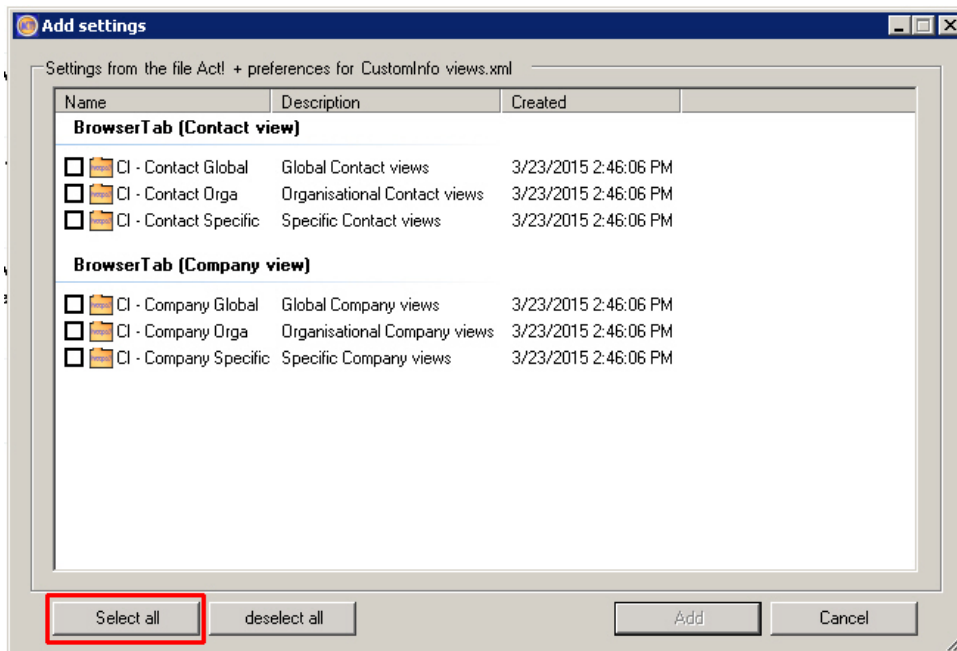
C:\Program files\Melville-Schellmann\CustomInfo4

OR

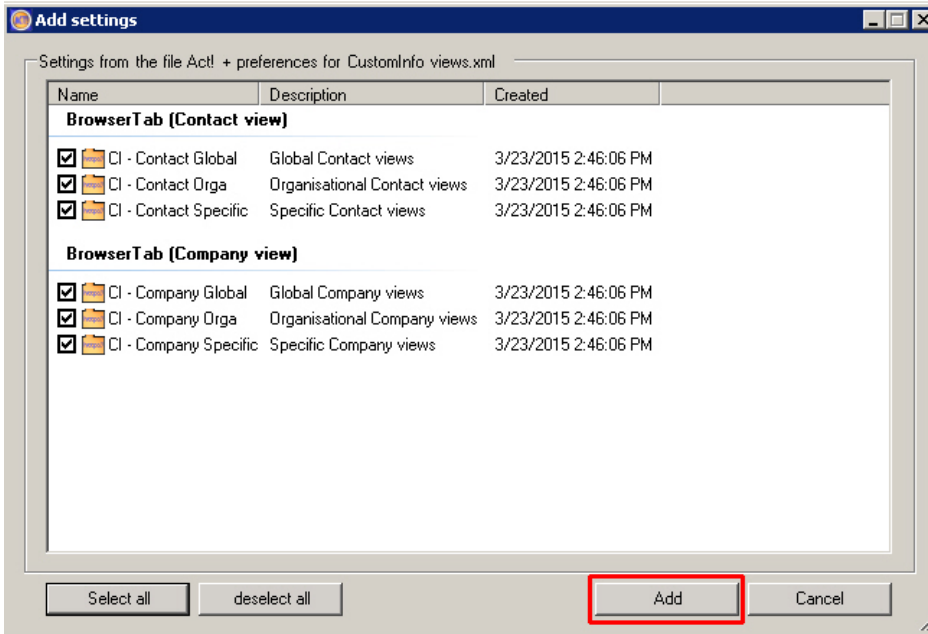
C:\Program files(x86)\Melville-Schellmann\CustomInfo4 (on a 64-bit system)



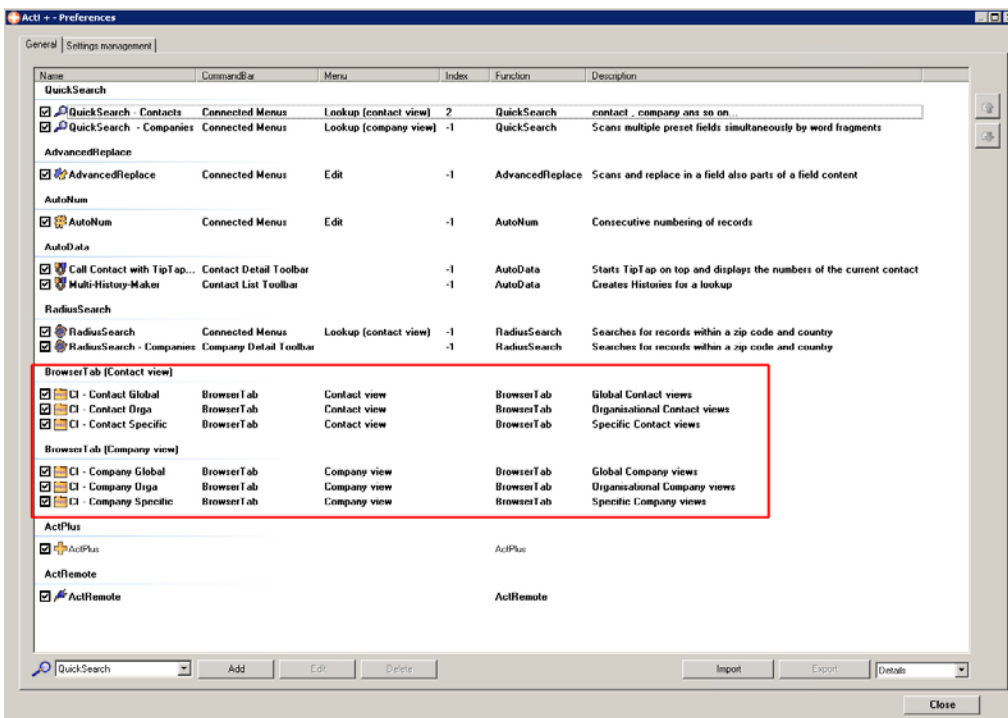
Open the file and "Select all":



Choose "Add":



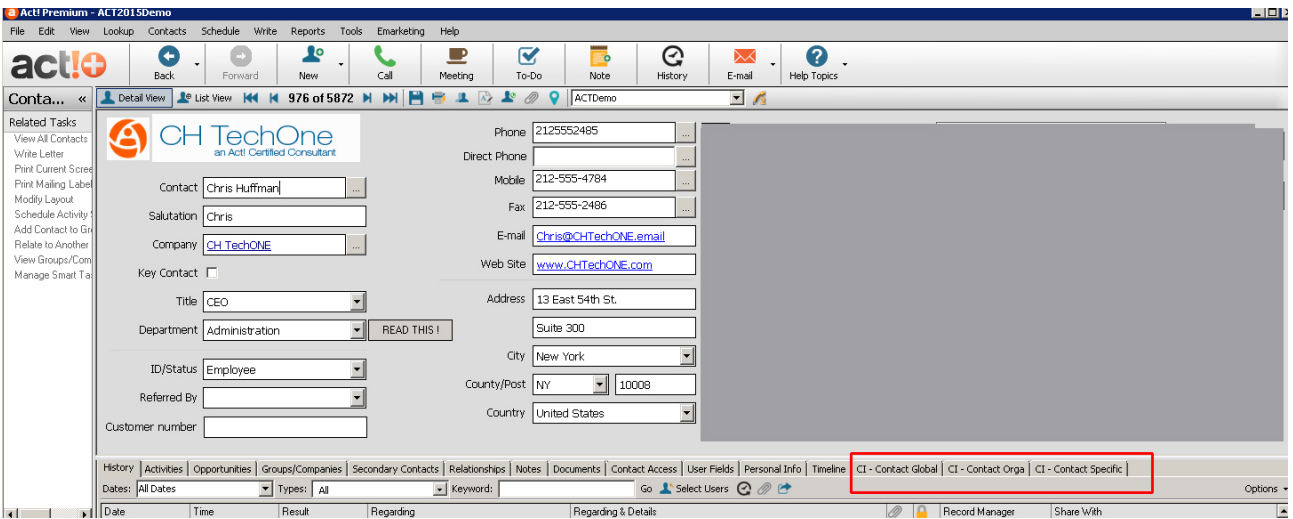
and you will see this result:



Close the configuration screen.

The standard CustomInfo Tabs and views are now available in the Contact and Company detail views.

## 6.2 Contact views



Act! Premium - ACT2015Demo

File Edit View Lookup Contacts Schedule Write Reports Tools Marketing Help

act! Back Forward New Call Meeting To-Do Note History E-mail Help Topics

Conta... << Detail View List View 976 of 5872 ACTDemo

Related Tasks

View All Contacts  
Write Letter  
Print Current Screen  
Print Mailing Label  
Modify Layout  
Schedule Activity  
Add Contact to Group  
Relate to Another  
View Groups/Companies  
Manage Smart Tasks

CH TechOne  
an Act! Certified Consultant

Contact: Chris Huffman  
Salutation: Chris  
Company: CH TechONE  
Key Contact:   
Title: CEO  
Department: Administration  
ID/Status: Employee  
Referred By:  
Customer number:

Phone: 2125552485  
Direct Phone:  
Mobile: 212-555-4784  
Fax: 212-555-2486  
E-mail: Chris@CHTechONE.email  
Web Site: www.CHTechONE.com

Address: 13 East 54th St.  
Suite 300  
City: New York  
County/Post: NY 10008  
Country: United States

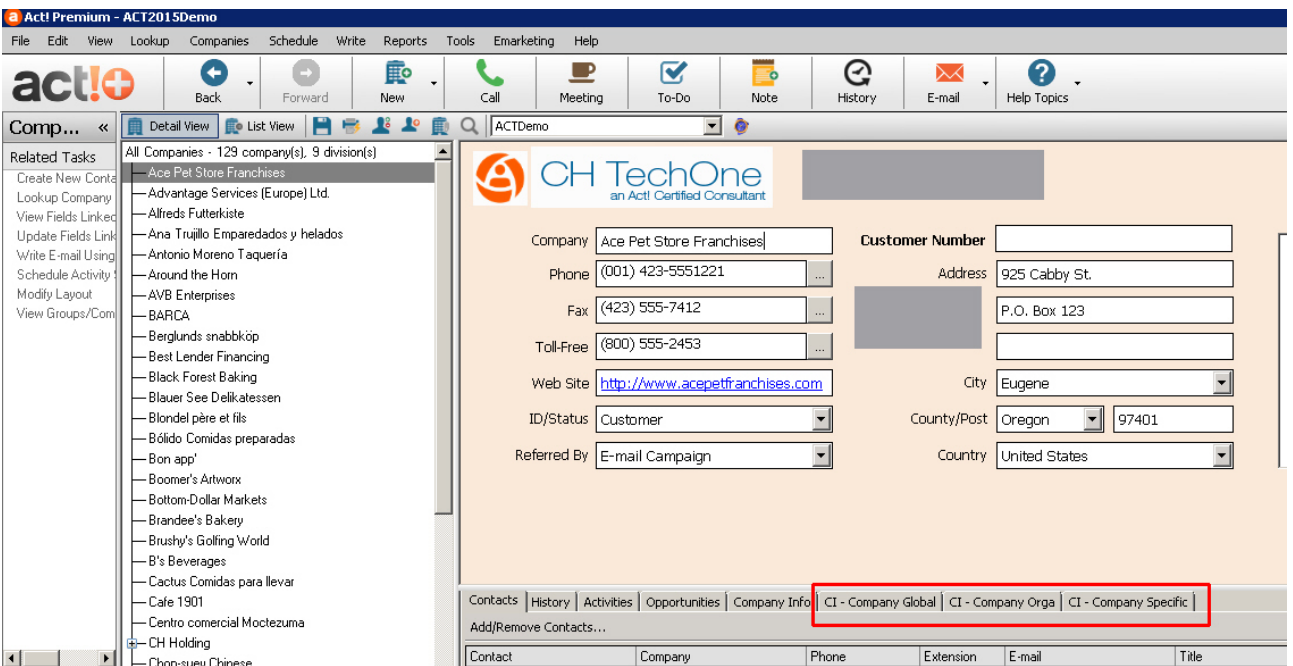
History Activities Opportunities Groups/Companies Secondary Contacts Relationships Notes Documents Contact Access User Fields Personal Info Timeline

Dates: All Dates Types: All Keyword: Go Select Users

CI - Contact Global | CI - Contact Orga | CI - Contact Specific

Date Time Result Regarding Regarding & Details Record Manager Share With

## 6.3 Company views



Act! Premium - ACT2015Demo

File Edit View Lookup Companies Schedule Write Reports Tools Marketing Help

act! Back Forward New Call Meeting To-Do Note History E-mail Help Topics

Comp... << Detail View List View ACTDemo

Related Tasks

Create New Contact  
Lookup Company  
View Fields Linked  
Update Fields Link  
Write E-mail Using  
Schedule Activity  
Modify Layout  
View Groups/Companies

All Companies - 129 company(s), 9 division(s)

- Ace Pet Store Franchises
- Advantage Services (Europe) Ltd.
- Alfreds Futterkiste
- Ana Trujillo Emparedados y helados
- Antonio Moreno Taqueria
- Around the Horn
- AVB Enterprises
- BARÇA
- Berglunds snabbköp
- Best Lender Financing
- Black Forest Baking
- Blauer See Delikatessen
- Blondel père et fils
- Bóldo Comidas preparadas
- Bon app'
- Boomer's Artworx
- Bottom-Dollar Markets
- Brandee's Bakery
- Brushy's Golling World
- B's Beverages
- Cactus Comidas para llevar
- Cafe 1901
- Centro comercial Moctezuma
- CH Holding
- Chop-suey Chinese

CH TechOne  
an Act! Certified Consultant

Company: Ace Pet Store Franchises  
Phone: (001) 423-5551221  
Fax: (423) 555-7412  
Toll-Free: (800) 555-2453  
Web Site: http://www.acepetfranchises.com  
ID/Status: Customer  
Referred By: E-mail Campaign

Customer Number:  
Address: 925 Cabby St.  
P.O. Box 123  
City: Eugene  
County/Post: Oregon 97401  
Country: United States

Contacts History Activities Opportunities Company Info

CI - Company Global | CI - Company Orga | CI - Company Specific

Add/Remove Contacts...

Contact	Company	Phone	Extension	E-mail	Title
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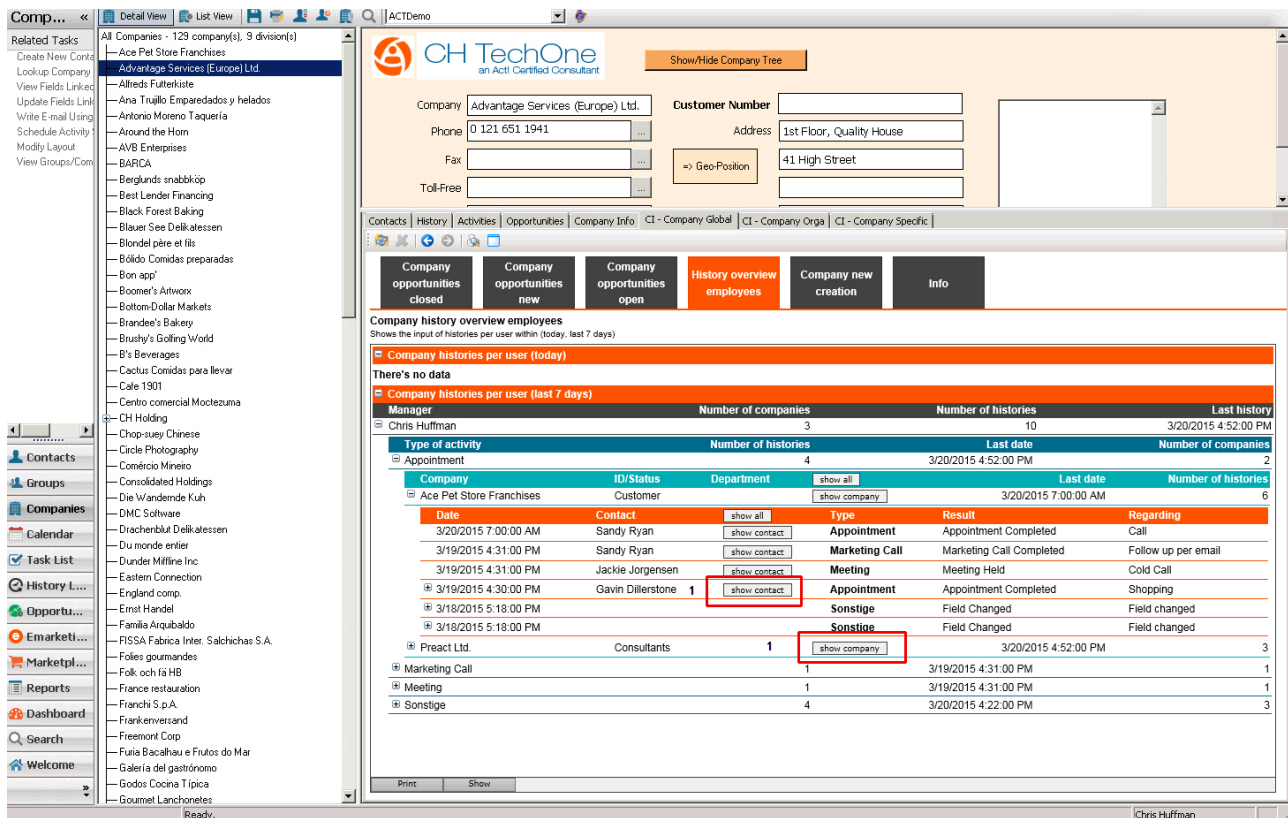


## 7 Short explanation of CustomInfo standard views

CustomInfo comes with ready-made data queries for an ACT! database which refer to the data captured in your own ACT! application, and provide you with important, readily accessible views of your own CRM performance. Condensed information for logging and forecasting is thus at your disposal straight away, making your work with ACT! far more structured, efficient and meaningful.

Each Tab contains Buttons executing the actual query.

Example TAB (Company global):



The screenshot shows the ACT! software interface. The main window displays the details for 'Advantage Services (Europe) Ltd.' with fields for Company, Phone, Fax, Toll-Free, Address, and Geo-Position. Below this, there are several tabs: 'Company opportunities closed', 'Company opportunities new', 'Company opportunities open', 'History overview employees', 'Company new creation', and 'Info'. The 'History overview employees' tab is active, showing a table of company histories per user (last 7 days). The table has columns for Manager, Number of companies, Number of histories, and Last history. Below this, there is a table of company histories per user (last 7 days) with columns for Type of activity, Number of histories, Last date, and Number of companies. The table shows various activities like Appointment, Marketing Call, Meeting, and Sonstige, with details on dates, contacts, and results. Red boxes highlight 'show contact' and 'show company' buttons in the table.

The contact views are similar to the company views. Depending on how Act! is being used, some views might not be necessary in a specifically company-oriented database.

"Global" and "Organsitional" views are not related to the actual Contact/Company visible in the detail view. They deliver results based on the database as a whole whereas the "Specific" views are referring to the actual Contact/Company in the detail view. Changing the Contact/Company in the detail view will update a "Specific" view automatically.

1 In case the view shows something that might be of immediate interest concerning the context, the views contain "show" buttons, allowing to "jump" directly to the origin of data in the database (Company, Opportunity, Contact).

## 7.1 Contact views Global

This view contains 5 queries.

- Opportunities closed
- Opportunities new
- Opportunities open
- History overview employees
- New Contacts of last 30 days

## 7.2 Contact views Organisational

This view contains 4 queries.

The queries show "bad data" in the Opportunity/Contact area.

- Contacts without Company link
- Contact histories without Company link
- overdue Opportunities
- Opportunities with zero values for amounts/probabilities

## 7.3 Contact views Specific

This view contains 1 query.

- Company relations

This view cures the general lack of Act! having no Company relation table, only a Contact relation table.

Based upon Contact relations, this query show relations between Companies based on the Contact relation.

## 7.4 Company views Global

This view contains 5 queries.

- Opportunities closed
- Opportunities new
- Opportunities open
- History overview employees
- New Companies of last 30 days

## 7.5 Company views Organisational

This view contains 4 queries.

The queries show "bad data" in the Opportunity/Company area.

- Companies without Contact link
- Opporntities without Company link
- overdue Opportunities
- Opportunities with zero values for amounts/probabilities

## 7.6 Company views Specific

This view contains 1 query.

- Company relations

This view cures the general lack of Act! having no Company relation table, only a Contact relation table.

Based upon Contact relations, this query show relations between Companies based on the Contact relation.

## 8 Registering the protocol handler in the network

After installing **CustomInfo**, the protocol handler (kundeninfo4://) in the installation folder is enabled and registered. If, for example, you want to use **CustomInfo** centrally installed on a server (or copied to it) the batch file

CustomInfo4\_activate.bat

has to be run on the client computers using network release. If you are using Windows Vista or Windows 7, you may need to start the process by clicking the right mouse on "Run as Administrator..." .

**Note:** If the active protocol handler is changed, you will need to close and restart Internet Explorer and Act!.