TopLine Designer - Administrator

Importing Data

From CSV:

1. **Tools, TopLine Designer-Manager**
2. Select the Custom Tables
3. Click **Import Data**
4. Import Wizard will open
5. **Next**
6. Create a New Import profile or load an existing data map.
7. Select the Custom Table to import into
8. **Next**
9. Map the Source fields to the Custom Table ACT! fields
10. Check **Dupe Box**
11. **Next**
12. Click **Finish**

From ACT!:

1. **Tools, TopLine Designer-Manager**
2. Select the Custom Table for migration
3. Click **Migrate from ACT!**
4. Click **OK**
5. Click **Yes**
6. Click **OK** to return to the Define Fields screen

Schemas

Importing:

1. **Tools, Define Custom Tables**
2. Click **Import Schema**
3. Browse to the Schema file
4. Click **Open**
5. Click **OK**
6. **Finish**
7. Click **OK** to close the Define Fields Window

Exporting:

1. **Tools, Define Custom Tables**
2. Click **Export Schema**
3. Select the Custom Table Entities
4. Select other ACT! items to include
5. Enter the file name
6. Give a description
7. Click **OK** to close the Define Fields Window

Templates

To create a template:

1. Navigate to a that contains a record to merge
2. Right click on the **Record**
3. MS Word doc and Merge Fields window will launch
4. Create your doc
5. Double click on the **Field** in the Merge Fields window to add to the doc
6. Click on the **Entity** dropdown to select fields from different tables
7. Once the doc is complete click on **Save and Close** on the popup window

To create nested custom tables in a template:

1. Create a new table in MS Word
2. Table should be two rows and one column per field you want to merge
3. First row specifies which field should be merged into each column
4. Use the following format: **Designer.[TABLENAME].[FIELDNAME]**

Linking

Activities or Opps:

1. **Tools, Define Custom Tables**
2. Click **Define Relationship**
3. Click **Add Relationship**
4. **Next**
5. Select **Activities or Opportunities** from the Parent Table dropdown
6. Select the **Custom Table** from the Child Table dropdown
7. Assign a name to the key which will link the two fields
8. **Next**
9. Select the field in the Parent Table which will identify it from the Child Table
10. **Next**
11. Click **Finish**
12. Click **OK** to return to the Define Fields Screen

Organize Tabs

Quickview:

1. **Tools, TopLine Designer - Quickview**
2. **Uncheck** all of the corresponding boxes to your custom tabs
3. **Re-Check** the corresponding boxes in the order you wish to view them
4. Click **OK**

Designer for Web

Initial Set-up:

1. Click on the **Designer for Web License Manager** from the Start Menu
2. Click **Initial Setup**
3. Select the Web Server Path
4. **Next**
5. Click **Install TopLine Designer for Web**
6. **Next**
7. Click **OK**
8. Click **Yes**
9. Click **OK**
10. Click **Finish**

Add serial numbers:

1. **Startup Screen**
2. Click **Add Serial Numbers**
3. Enter the TopLine Designer serial number into the box
4. Click **Register Serial Number**, it will display in the lower section
5. **Next**
6. Click **Finish** to return to the Main License Manager screen

Associate Users:

1. **Start-up Screen**
2. Click **Associate ACT! Users**
3. Click **Select ACT! Database**
4. Browse to find the ACT! database
5. Click **Open**
6. Enter the ACT! username and password of the ACT! Admin
7. **Next**
8. Select the ACT! User and unused license
9. Click Associate **ACT! User with Serial Number**
10. **Next**
11. Click **Finish**

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Tables

To create a new table:

1. **Tools, Define Custom Tables**
2. Click **Add Table**
3. **Next**
4. Enter the Name
5. **Next**
6. Make changes to Layout, Lookup or View options as desired
7. **Next**
8. **Finish**
9. Click **OK** to save changes and exit Designer View

To add fields to a table:

1. In TopLine Designer Define view...
2. Select the table if necessary
3. Click **Add Field**
4. Add the field criteria as desired
5. Click **OK** to save changes and exit Designer View

Relationships

To define a relationship:

1. Define the two tables with desired fields
2. **Tools, Define Custom Tables**
3. Click **Define Relationships**
4. Click **Add Relationship**
5. **Next**
6. Select the parent and child tables
7. **Next**
8. Use suggested key name, but it may be best to name it the same name of the field that you will pick in the next step. (If you have the program create a key, it is a 36 digit unique identifier.)
9. **Next**
10. Select field in Parent table that identifies it (so when viewing records in sub-entity, you can id which parent table it belongs to).
11. Accept default or change.
12. **Next**
13. **Finish**
14. Click **OK** to save changes and exit Designer

Screens/Views

To create/modify a screen:

1. **Tools, Design Custom Table Screens**
2. Select the table from the drop-down, if necessary
3. Select the view name
4. Click **Design Screen**
5. Click the **Add Field** button
6. **[Ctrl+Click]** the fields you want to add and click **OK**
7. Select fields and use the arrow keys to arrange the layout.
8. Use the **Field Properties** button to modify Label Text, Field Width, Field Height, Row or Column Span, Label Color, Field Color or Field Text Color
9. Add an Image if desired
10. Click the **Screen Color** button (lower-right) to change the background color.
11. Use mouse to resize the window for optimum height and width.
12. Click **OK**.

Quick modify screen:

1. **Tools, TopLine Designer-Quickview**
2. Select **Table Name**
3. Double click on **Screen Name**
4. Drag and drop fields in the screen layout
5. **OK**

To add a grid to a screen/view:

1. Create the, tables, views, and the relationship between the tables
2. Select the table from the drop-down, if necessary
3. Select the view name
4. Click **Design Screen**
5. Click **Add Field**
6. Select the relationship and click **OK**
7. Select the grid field and click the **Field Properties** button to change the Column span and Field Width if necessary.
8. Use the mouse to resize window for optimum height and width
9. Click **OK, OK**

Calculations

*To create a horizontal calc: (ex: Qty * Price = Total)*

5. Create the fields the will hold the data (ex: Qty and Price)
6. Create a field that will hold the results (ex: Total)
7. Edit the Screen/View (see left)
8. Click **Modify Scripting** button
1. Click **Insert Snippet**
2. Select your calculation type (ex: Multiply Two Fields)
3. Select the "result" field that will hold the results of the calculation
4. Select fields to be used in calculation from the drop-downs
5. Select when to run the calculation and click **OK**
6. **OK, OK, OK**

To create a vertical calc:

Vertical calculations are automatically available for all numeric and currency fields. They are not available for dates, character, or other field types.

To create a calculation among two fields in different tables:

(A relationship between tables must be defined. Create a field in the Master table that will be used to display results of the calculation.)

7. **Tools, TopLine Designer-Manager**
8. Click **Calculations** at the left
9. Click **Create New Calculation**
10. Select the **Relationship**
11. Select the **Result Field** that will display the results of the calculation
12. Select the **Operation**
13. Select the field in the child table to calculate on.
14. Click **Save**
15. Click **OK**