

Another efficient and affordable ACT! Add-On by

e^xponencial

ACT! Calendar to Excel

v.6.0

for ACT! 2008 and up

<http://www.exponencial.com>

Table of content

Purpose of the add-on	3
Installation procedure	3
How it works	3
Saving your calendar settings.....	5
Templates	6
Creating or editing a template.....	6
Understanding the different sections	7
Main sections	7
More specific sections	8
Adding/modifying a section	10
How to delete a section.....	11
Inserting fields in sections.....	11
Formatting sections	12
Registering your product	14
Support	14

Purpose of the add-on

ACT! Calendar to Excel is an add-on that allows you to export your calendar to Excel, i.e. create an activity report sorted by date with the ability to include any contact, company or activity field as well as with the great formatting possibilities that Excel offers.

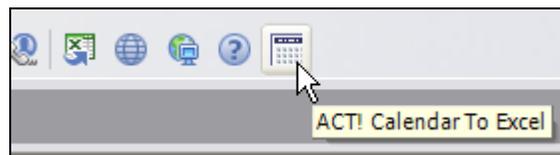
Installation procedure

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

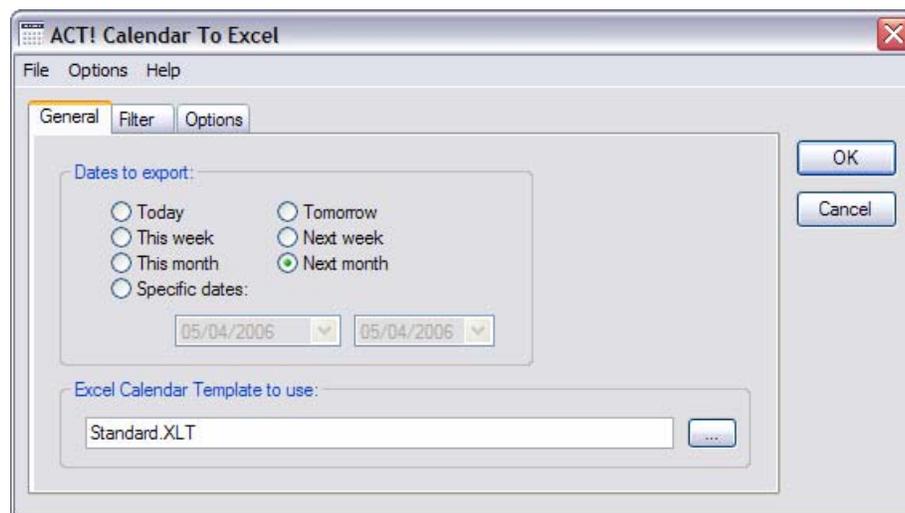
Note: add-ons are now DLL files and not executable files. This means that they are automatically initialized by ACT! when placed in ACT! plugin folder (a subfolder of the main ACT! directory) and cannot be started from the Windows Start menu anymore. This is why you are not given a choice of installation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

How it works

To start the add-on, look for the icon on your Contact toolbar.

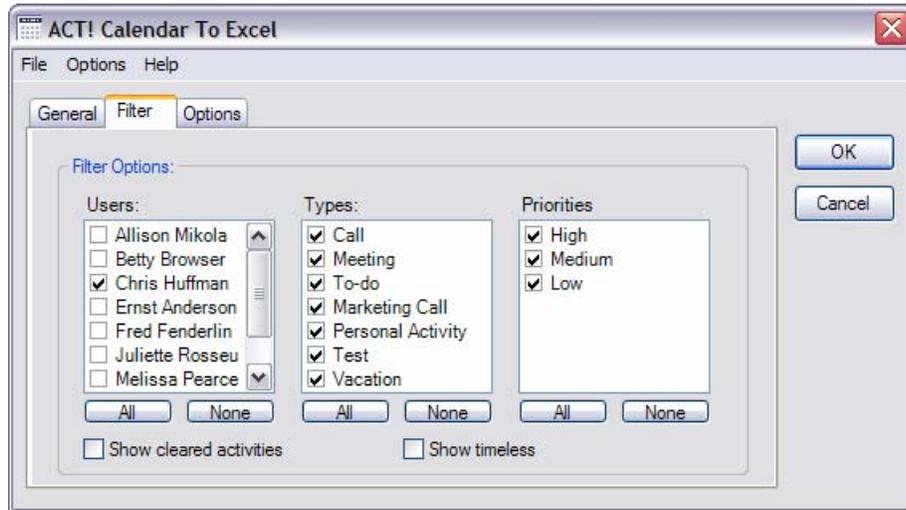


The interface should be pretty much self explanatory. Under the *General* tab, you select the date range you want to print a calendar for, the calendar template you want to use.

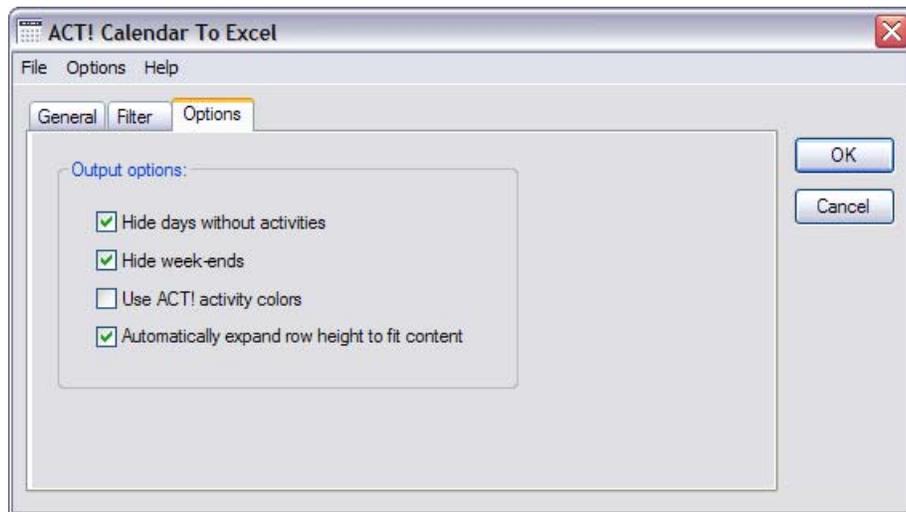


You can click the ... Button next to the template box to select any template.

Under the *Filter* tab, you select the filtering options.

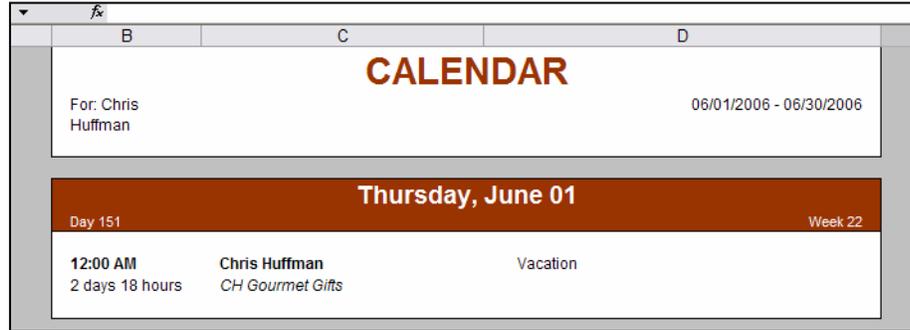


Under the Options tab, you select the Output options:



NOTE: Checking *Automatically expand row height to fit content* is recommended as Excel will automatically reset the height of all rows so that the content of all cells be visible.

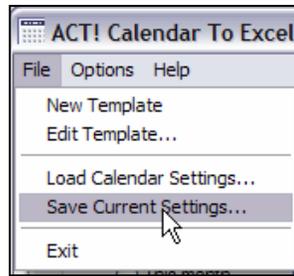
Then you press OK and the calendar displays itself in Excel



Saving your calendar settings

Your last calendar settings are automatically saved so that, the next time you open ACT! Calendar to Excel, they are automatically loaded.

You may also save them permanently. To do this, go to the File menu and choose *Save Current Settings...*



You will be then prompted to enter a name for the settings file.

Once this is done, you can load your settings at any time by doing *File > Load Calendar Settings...*

The next section called Templates is of interest to you if you want to create your own templates, modify existing templates. If you are fine with the templates supplied with the add-on, you do not need to read it.

Templates

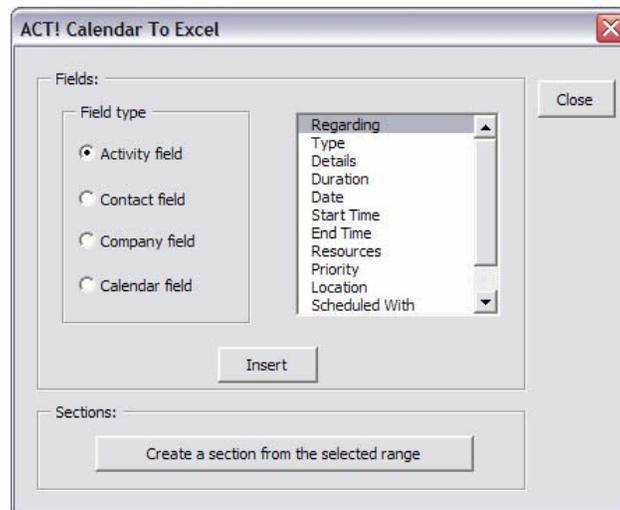
Creating or editing a template

ACT! Calendar to Excel uses a template file to create your calendar in Excel. This template file has a .XLT extension

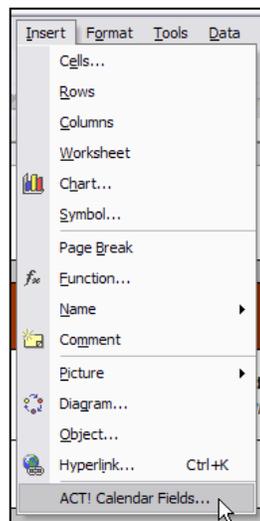
NOTE: It is not a regular .XLT file: it contains macros necessary to the addon to correctly merge the information. So you could not just take any existing .XLT file on your system.

You can create a new template by going to *File > New Template* or you may want to edit the existing templates using the *File > Edit Template...* command.

In both cases, Excel opens and you get a special window allowing you to insert fields and define sections.



If you close this window, and need to open it again, go to Excel *Insert* menu and look for *ACT! Calendar Fields...*



Understanding the different sections

To render properly a calendar, a template needs to contain several sections. None of these sections are mandatory but if the template has no section, the calendar will be blank.

Main sections

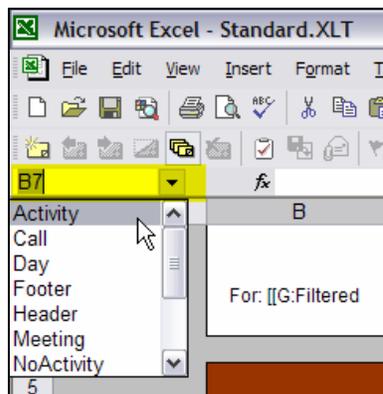
The main sections are:

- the Header section is inserted once at the top of the calendar.
- the Day section is inserted for each day to be displayed before any activity in the day
- the Activity section is inserted for each activity
- the No activity section: this section is inserted when a day has no activity
- the footer section is inserted once at the bottom of the calendar

Here is an example.

CALENDAR		
For: Chris Huffman		06/01/2006 - 06/30/2006
Header Section		
Thursday, June 01		
Day 151		Week 22
Day Section		
12:00 AM 2 days 18 hours	Chris Huffman CH Gourmet Gifts	Vacation
Activity Section		

Sections are just areas of the templates that are named with the section name. If you wish to select a section or see which sections are available, click the Name box of your Excel template. This is the dropdown to the left of the insertion box. If you click one of the section names, the section becomes selected in the document.



More specific sections

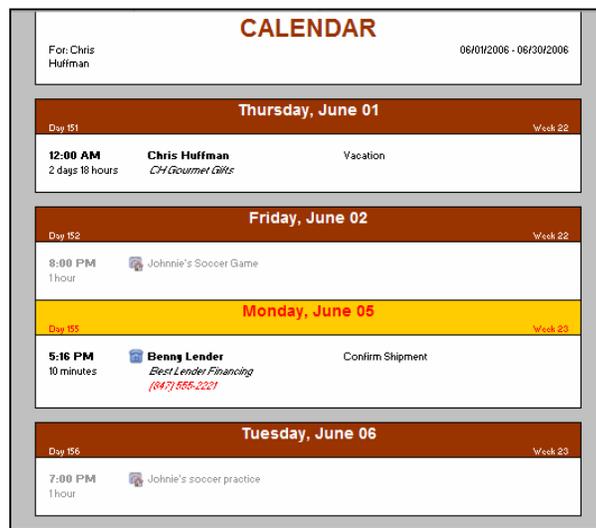
Day sections

Typically you want the same Day section to be inserted at the top of the activities for a day. But you may want to have different sections depending on the day of the week to make them stand out for example. You can create Monday, Tuesday, Wednesday, Thursday, Friday, Saturday and Sunday sections.

The logic is that before it inserts a new day, the add-on first looks for the corresponding day-specific section and if it can't find one, it uses the generic Day section.

NOTE: The same area of the Excel document may be named several times. If you want your Monday and Thursday section to be identical, you can select the same area and name it twice.

Here is an example. We have created a Monday section with different colors to have all Mondays stand out as they mark the beginning of the week.



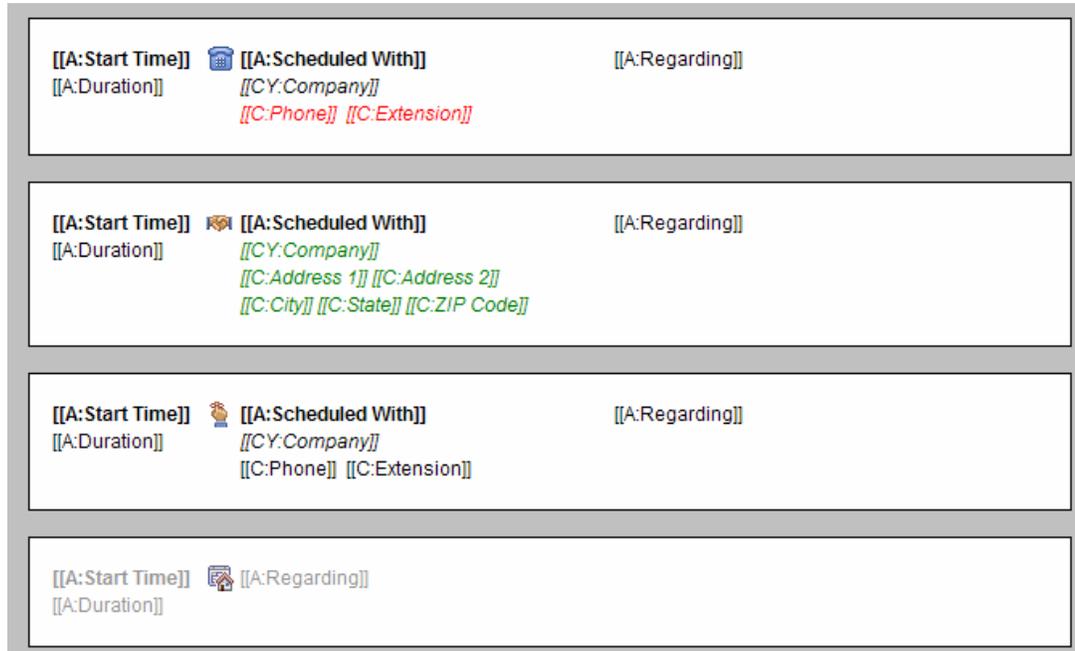
Activity Sections

You can have Call, Meeting, To-Do sections as well as sections for any type of custom activities. This way each type of activity may be displayed according to a different layout.

In the example shown above under Days sections, you can see that activities displayed have different icons and different field layouts. That's because one activity is a Call and the template has a Call section and another is a Personal activity and the template has a Personal activity section.

The logic is that before it inserts a new activity, the add-on first looks for the corresponding activity specific section and if it can't find one, it uses the generic *Activity* section.

Here is what it looks like in the template we used for the example above. You can see a Call section, then the Meeting section, The To-do section and the Personal Activity section. Each section has a different layout.

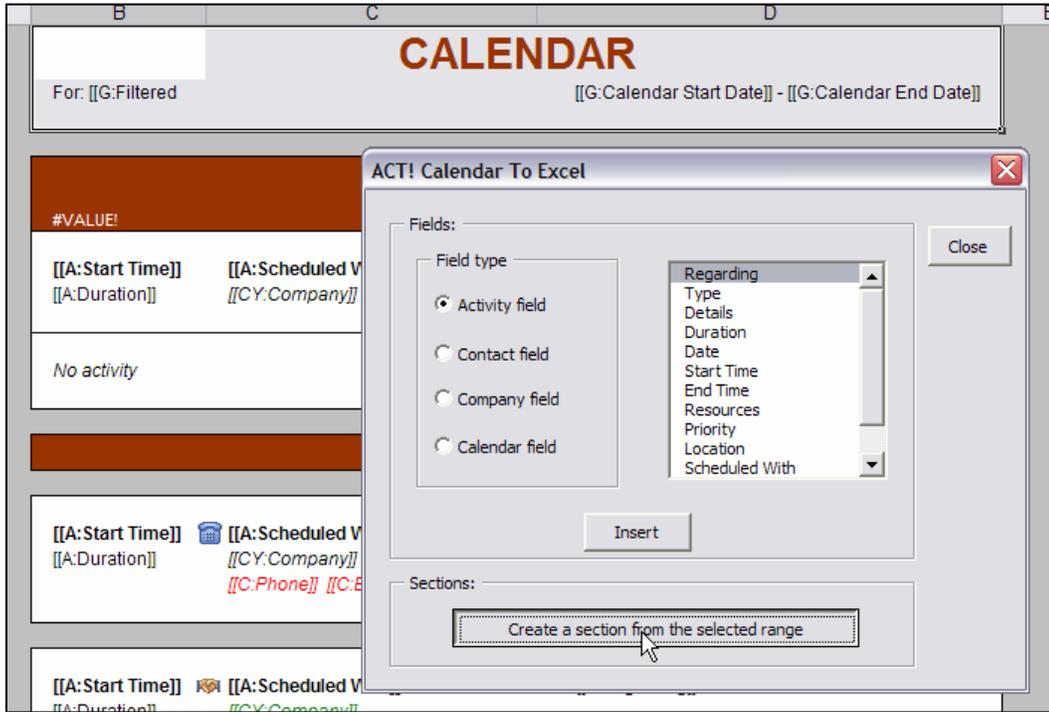


As a summary, let's remember that you do not have to create all these sections. At least you need an Activity section so that your calendar can display something. Typically you would want to have a Header, Day and Activity section. But if you want to have more control, you just create specific day or activity sections.

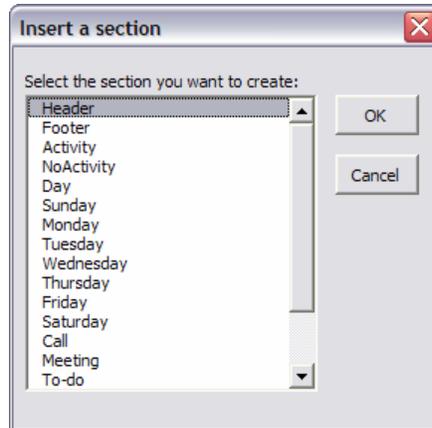
The best way to learn and understand how these sections work is to look at an existing template in edit mode.

Adding/modifying a section

To create (or modify) the Header section for instance, select the cells you want contained in the Header section, then click the Create a section from the Selected Range button.

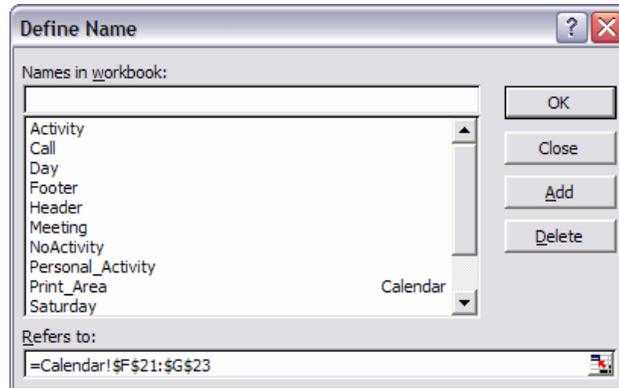


Then choose *Header* in the list of sections and press OK.



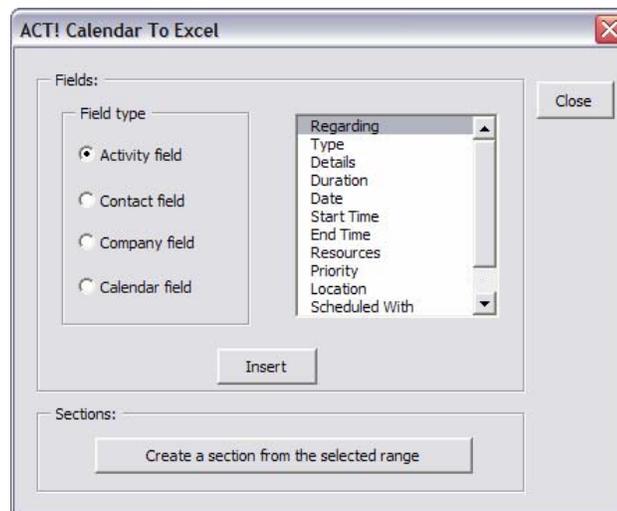
How to delete a section

Go to the Excel *Insert* menu, and then choose *Name > Define*. In the *Define Name* window, select the section you want to delete and click *Delete*.



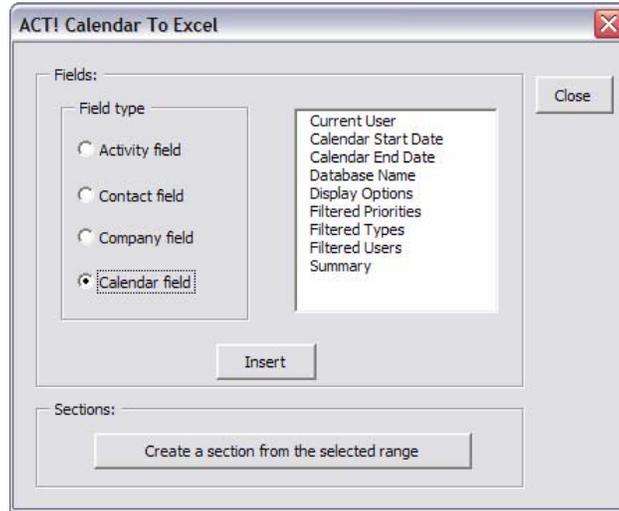
Inserting fields in sections

To insert fields in the template, first select the cell you want to insert a field in. Then in the ACT! Calendar To Excel window, select the type of field then the field you want to insert. If the cell already contains a value or a field, you will be prompted to choose between overwriting and appending to the current content of the cell.



You may insert activity fields, contact fields, company fields (provided the contact field belongs to a company) or calendar fields.

Calendar fields are related to your calendar settings (like the start and end dates). Typically you would insert them in a header or footer section.

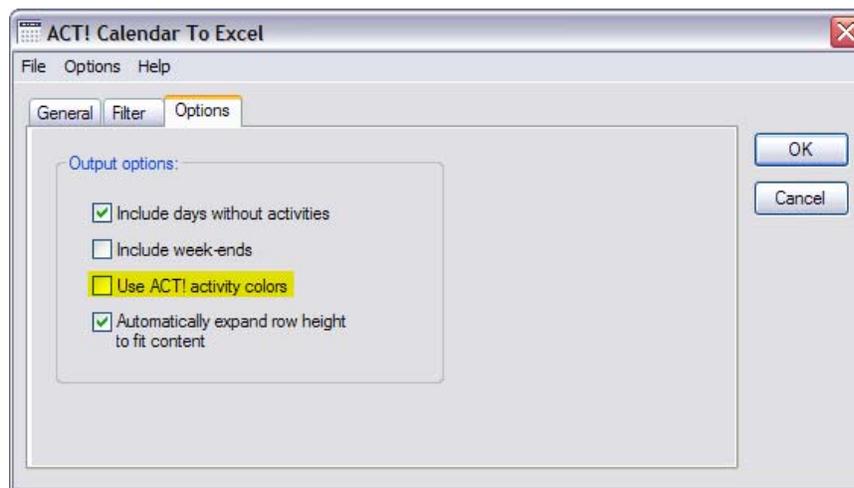


Remember that for a field to be replaced by a value, you need to have it inserted in a section.

Formatting sections

Sections can be formatted any way you want.

There is just one thing to remember and it concerns font colors if you use the *Use ACT! activity colors* under the *Options* tab (see below).

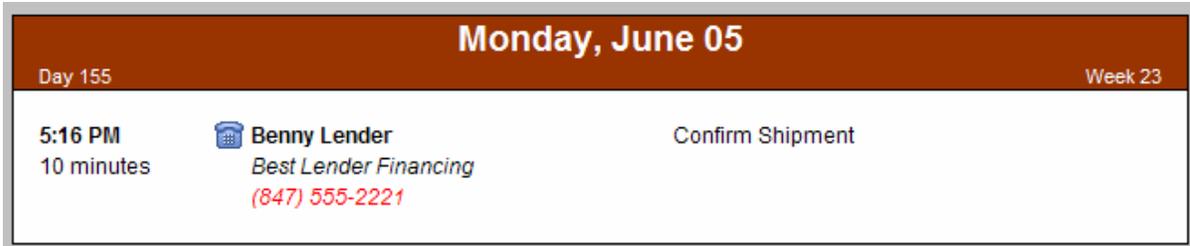


In that case, the add-on will automatically use the activity color as set in ACT! to display the activity information in all cells which font color is set to black.

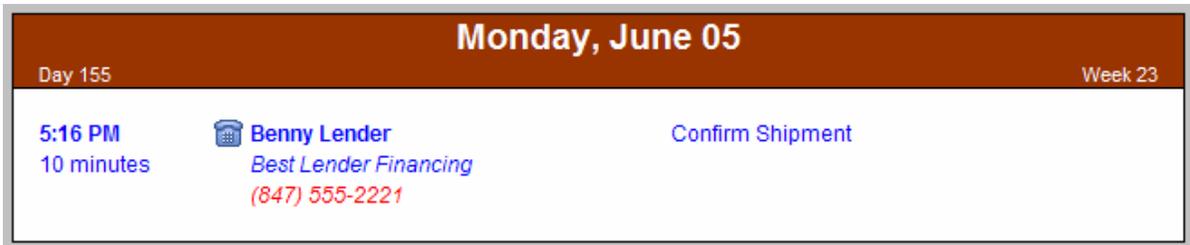
Let's take an example. Below is the Call section of a template.



If you do not check the Use ACT! activity colors option, the result will look like this:



If you do check the option and the activity is displayed in blue in ACT!, the result will look like this:



Only the cells that were in black in the Call section have been converted to blue. The other cells kept their original color.

Registering your product

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

Once you get a license code, either click the Register now button of the nag screen or go to the *Help* > *About* menu and once the *About* window opens, 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@exponenciel.com.

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