

ConCalculator



About:

ConCalculator is an Act! add-on that allows you to create calculations inside of Act! fields. Calculations can be triggered automatically when you change the value of the field, keeping your fields up to date all the time.

You can also run multiple calculations for the current Contact, Group, Company, Opportunity or current lookup. This can be done for multiple databases as well.

System Requirements:

Act! version 22 and higher

Computer with a Pentium IV or better processor

Windows 7, 8, 10 or 11 (64 bit for Act! v24+)

Installing:

In order to install the application, follow these directions:

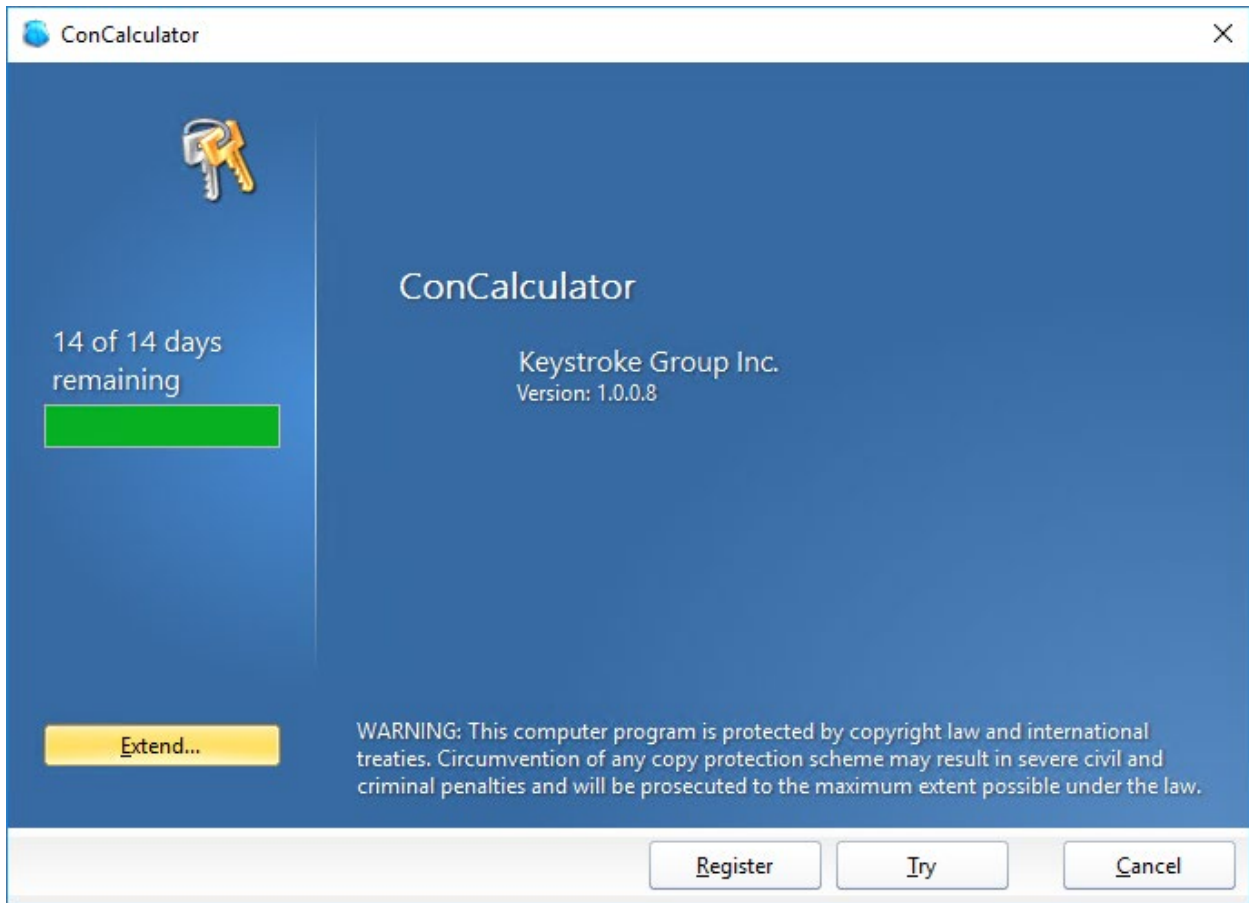
- a.) It is recommended that before these steps are completed that all programs including Act! are closed.
- b.) Visit the following address: <http://www.act4work.com/files/ConCalculator/>
- c.) Click on 'ConCalculator_Installer.exe' link.
- d.) Save the file to the PC. Once save is completed, launch application.
- e.) When the installer appears, choose Next to continue.
- f.) Check the box to agree to the terms of the license agreement and then press Next.
- g.) On the Remark screen, click on Next to continue.
- h.) Do not change the default install location and choose Next.
- i.) Press the Install button to start the process.

- j.) When finished, you can choose to start Act!. Check the Run Act! box and press Finish.
- k.) Act! will automatically launch.

Act! Setup:

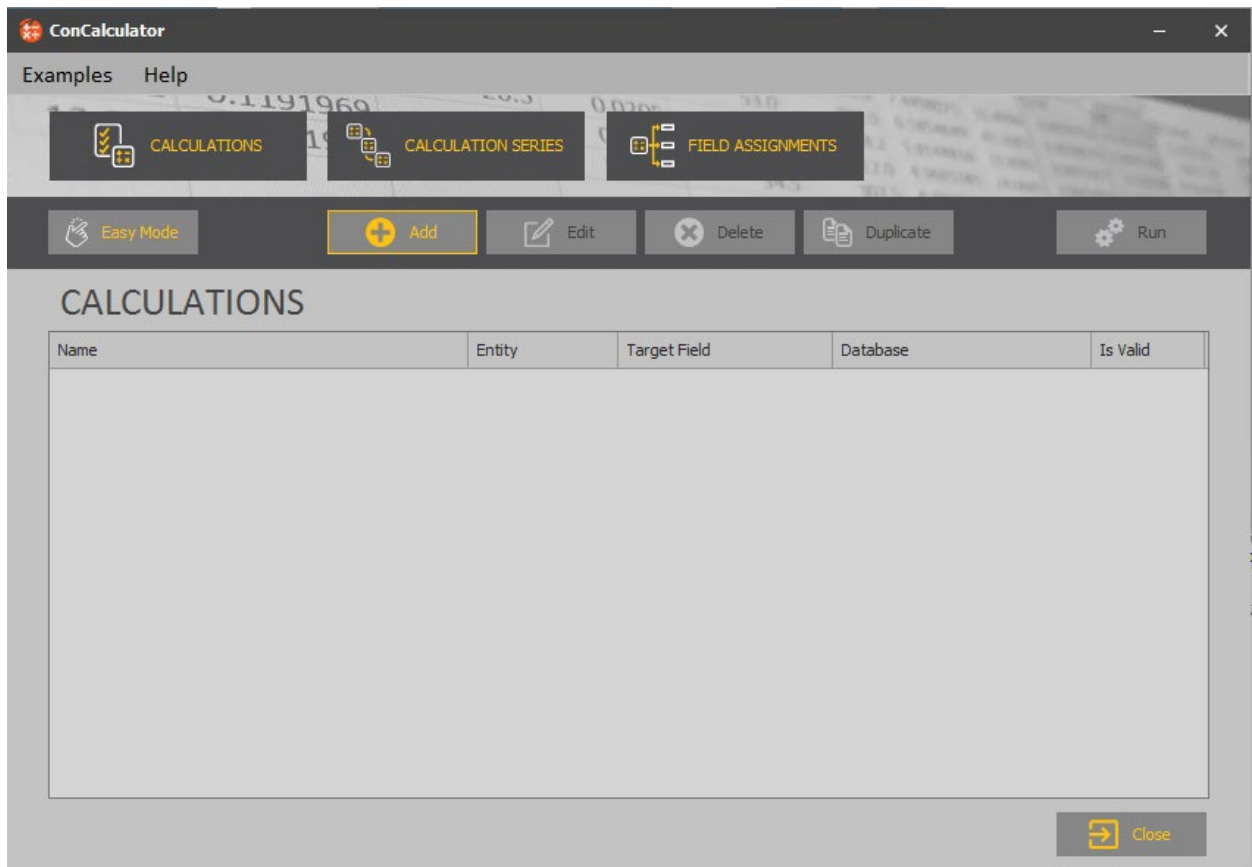
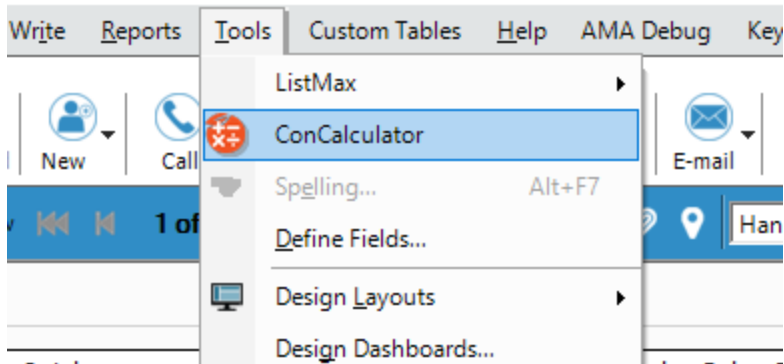
When Act! launches, the ConCalculator license software window will appear. No license is required to use the software on a 14-day trial. To proceed with the trial, click on the 'Try' button.

If a license for ConCalculator was purchased, click on the 'Register' button. You will need the serial number and email address of the account where the purchase was made.



Act! will load as needed after the license screen.

To access the ConCalculator settings, In the Act! menu bar, click on Tools and choose ConCalculator. The following screen will appear:



There are 3 main sections. 1.) Calculations 2.) Calculation Series 3.) Field Assignments

Calculations:

This section is where the majority of calculations are configured. You can click on the 'Add' button to begin adding a calculation manually. It is recommended to use the 'Easy Mode' button to begin.

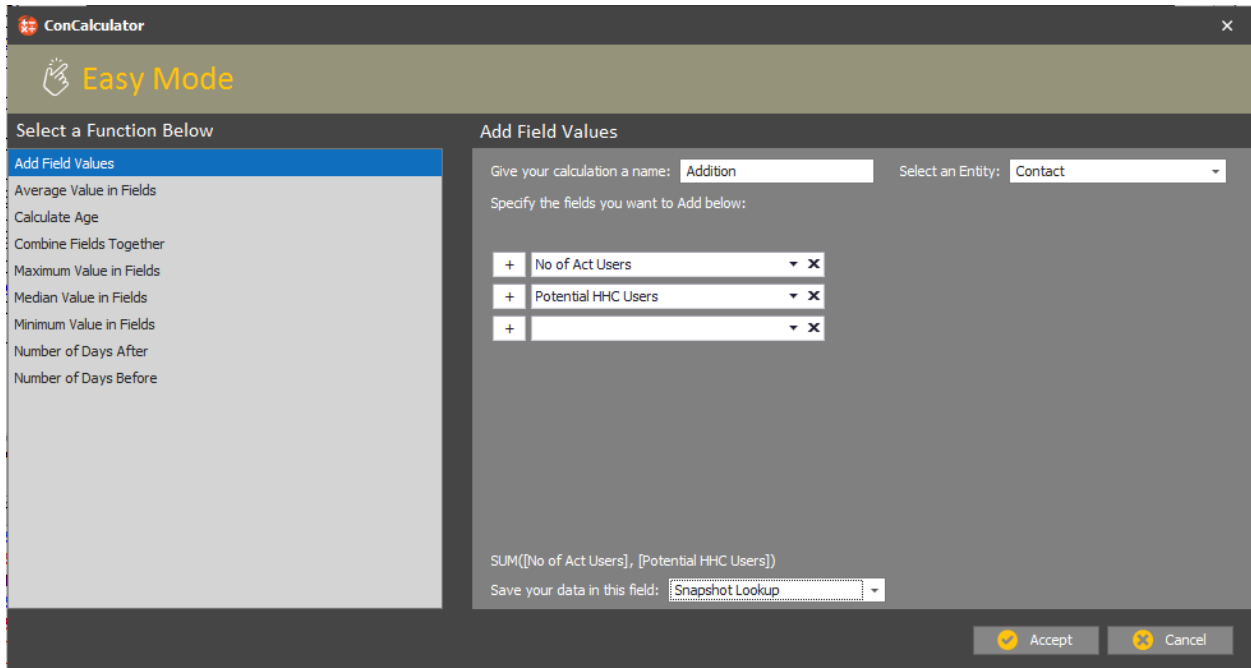
Within Easy Mode there will be a number of predefined calculations. Choose the suggested function from the list on the left side.



In this example, 'Add Field Values' was selected.

You need to give the calculation a name and select what entity it will be found from. This is either Contact, Company, Group or Opportunity.

Next, select the two fields you will add together. In this example only number fields are displayed.



When the fields are selected, choose the field where the calculation will be saved.

Click on 'Accept' button when finished.

The following screenshot is showing the manual calculation setup:

SETUP

Calculation Name:

Overwriting:

Select Entity:

Append:

Target Field:

All Databases: Allow use for any database

f() FUNCTIONS

Text:

Conditional:

Math:

Logical:

Date:

Description: *Description*

Sample: *Sample*

Not needed if using the Helper. Fields:

Enter Expression:

RESULTS

Results:

If using the manual calculation process, it is suggested to click on 'Use Helper' button feature. Before you can begin with the Helper, select a function first. This can be from Text, Math, Date, Conditional or Logical sections.

In the example below, 'CONCAT' was selected from the Text section before 'Use Helper' was clicked.

The screenshot shows a dialog box titled "Multi Value Function Helper" with a close button (X) in the top right corner. The dialog contains the following information:

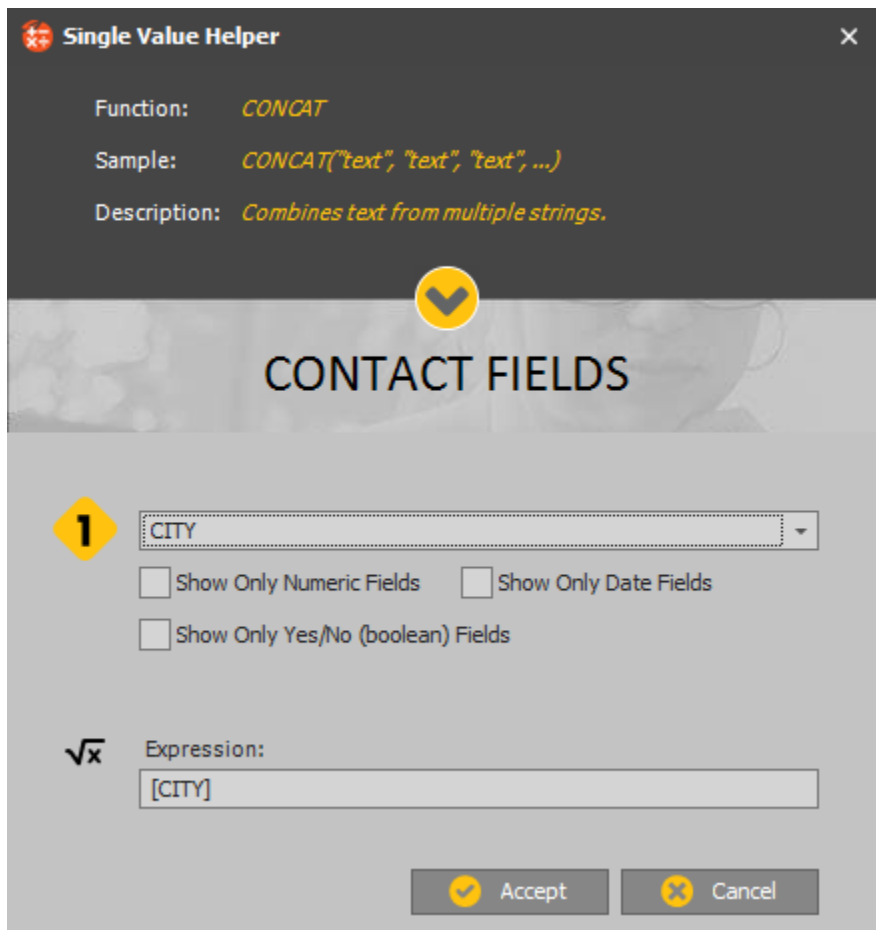
- Function: *CONCAT*
- Sample: *CONCAT("text", "text", "text", ...)*
- Description: *Combines text from multiple strings.*

Below this information is a yellow downward-pointing arrow icon. The main section of the dialog is titled "CONTACT FIELDS" and features a background image of a person wearing a face mask. It is divided into three numbered sections:

- 1 Values**: "Enter a value here or use a field. Normally you should use a field here." This section includes a text input field, a "Use Field" button, and an "Add Value" button.
- 2 Values List**: A list box with a header "Value" and an empty area below it for listing selected values.
- √x Expression:** A large text area for entering the final expression.

At the bottom of the dialog are two buttons: "Accept" (with a checkmark icon) and "Cancel" (with a yellow X icon).

Here you can combine information from multiple fields or add your own text. The value can be user entered text or field data. The example will combine 3 fields together, City, State and ZIP code. After selecting 'Use Field', then the first field (City) can be selected.



Click on 'Accept' to return to the 'Helper' screen.

Click on 'Add Value' button in order to apply the City field to the expression.

Repeat the same steps for the remaining two fields (State, ZIP).

This image will show all three fields now added to the CONCAT function:

Multi Value Function Helper

Function: *CONCAT*

Sample: *CONCAT("text", "text", "text", ...)*

Description: *Combines text from multiple strings.*

CONTACT FIELDS

1 *Values*
Enter a value here or use a field.
Normally you should use a field here.

2 *Values List*

Value
[CITY]
[STATE]
[ZIP_CODE]

√x *Expression:*

Click on 'Accept' button to save changes.

The full expression will be added to the 'Enter Expression' field. Click on 'Test Expression' button in order to see test results.

ConCalculator Setup

SETUP

Calculation Name: CityStateZip Overwriting: Always Overwrite

Select Entity: Contact Append:

Target Field: User 7 All Databases: Allow use for any database

f() FUNCTIONS

Text: CONCAT Conditional:

Math: Logical:

Date:

Description: *Combines text from multiple strings.*

Sample: *CONCAT("text", "text", "text", ...)*

Not needed if using the Helper. Fields:

Enter Expression: CONCAT([CITY], [STATE], [ZIP_CODE])

RESULTS

Testing with Contact: Peter Parker

Results: QueensNY10036

In the example above, all fields are added together into one string. There are no spaces or punctuation. This can be added to the 'Enter Expression' field manually. See below:

ConCalculator Setup

SETUP

Calculation Name: Overwriting:

Select Entity: Append:

Target Field: All Databases: Allow use for any database

f() FUNCTIONS

T Text: Conditional:

x+ Math: Logical:

📅 Date:

! Description: *Combines text from multiple strings.*

☰ Sample: *CONCAT("text", "text", "text", ...)*

Not needed if using the Helper. **☰** Fields:

√x Enter Expression:

RESULTS

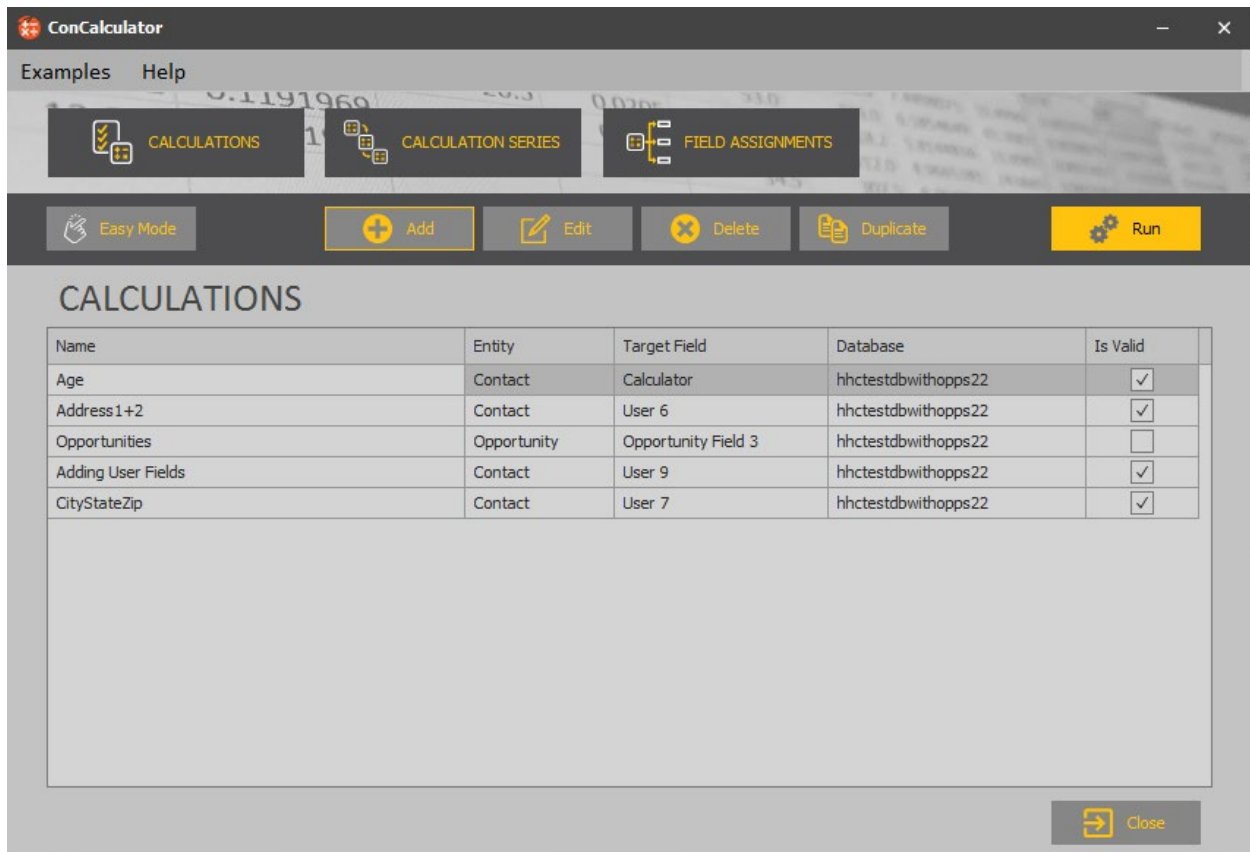
Testing with Contact: Peter Parker

📄 Results:

After pressing the 'Test Expression' button you can see the updated results and they are displayed in the manner expected.

Press the 'Save' button to add this calculation to the list.

All calculations will appear in the same location for better organization.



There are three additional buttons that can be utilized within the Calculations. They are:

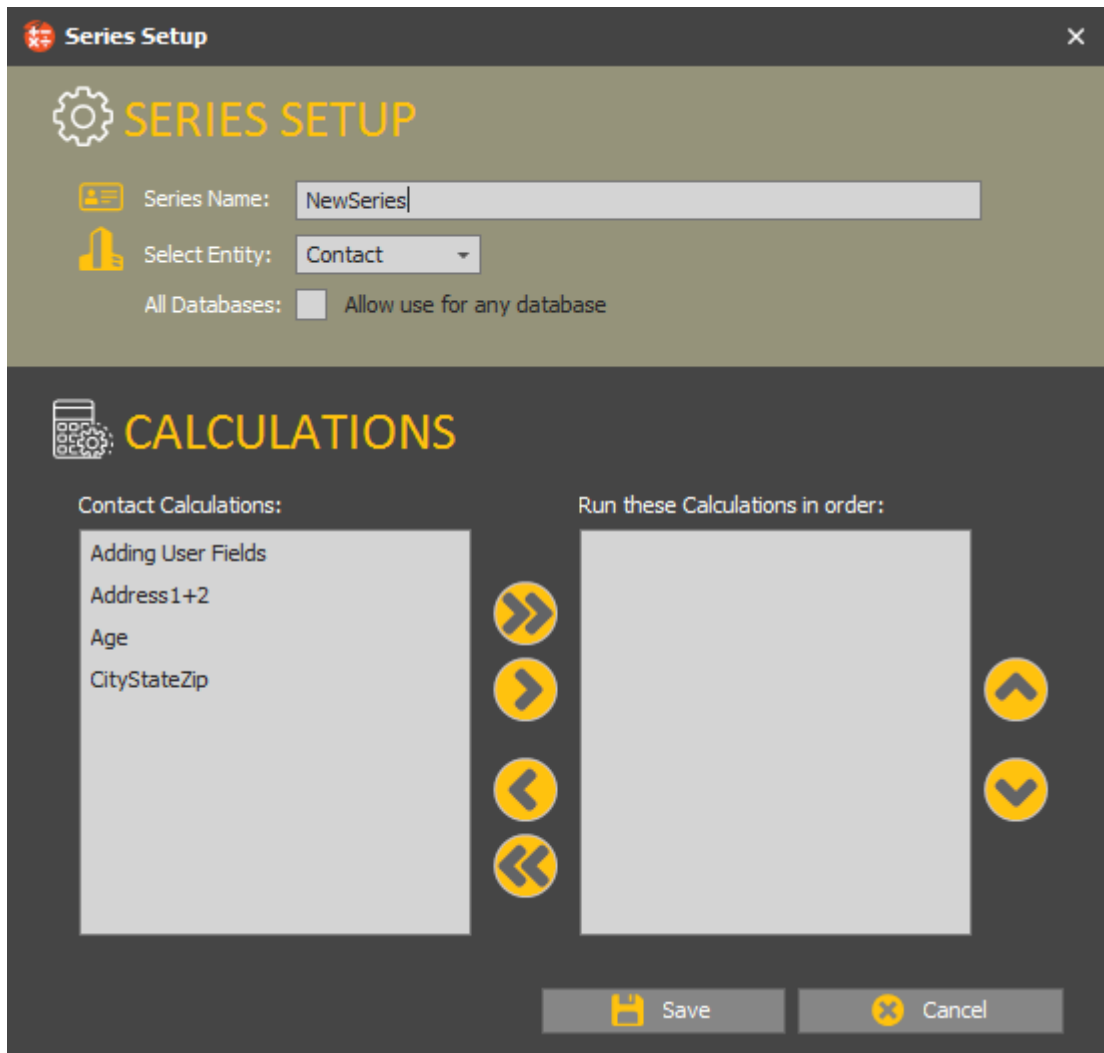
Edit – Open existing calculation and make modifications

Delete – Delete an existing calculation

Duplicate – Copy a current calculation and provide a new name to quickly create more calculations with different criteria.

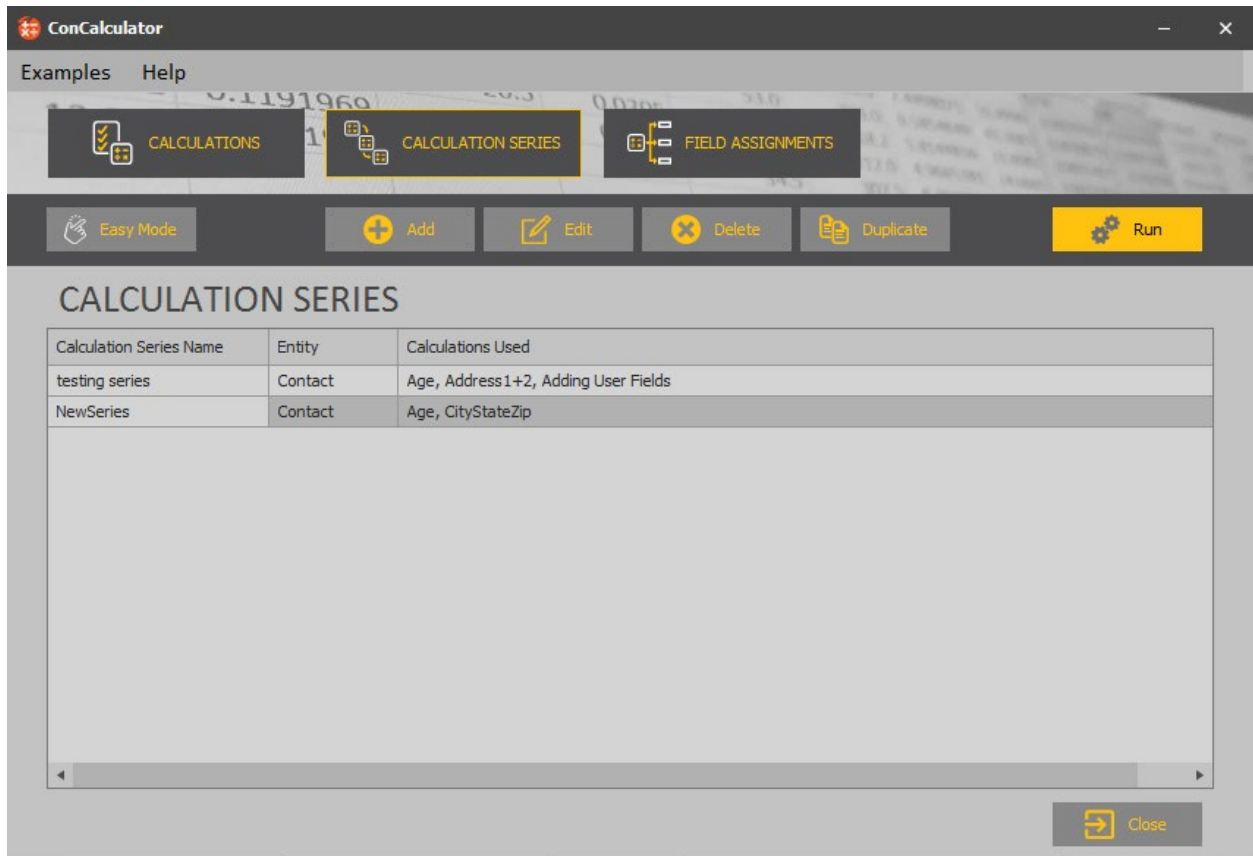
Calculation Series:

The next section of ConCalculator is for the Calculation Series. This is where you can configure previously created calculations to execute in a particular order. Press 'Add' to begin.



Once a new name is given for the series, the list of current calculations appears. Choose which calculations are needed and you can place them in a certain order.

Press 'Save' to continue.



There are three additional buttons that can be utilized within the Series. They are:

Edit – Open existing series in order to complete modifications

Delete – Delete an existing series

Duplicate – Copy a current series, provide another name and quickly create a new series with different criteria.

Field Assignments:

The final section of ConCalculator is Field Assignments. The intention of this section is to have calculations and/or calculation series trigger off a specific field. Click on 'Add' button to begin.

Field Assignment [Close]

Database: *hhctestdbwithopps22*

Calculation/Series: *CityStateZip*

Target Field: *User 7*

FIELD ASSIGNMENT

1 *Select a Calculation or Series*

Calculation:

Series:

2 *Select fields to trigger off of:*

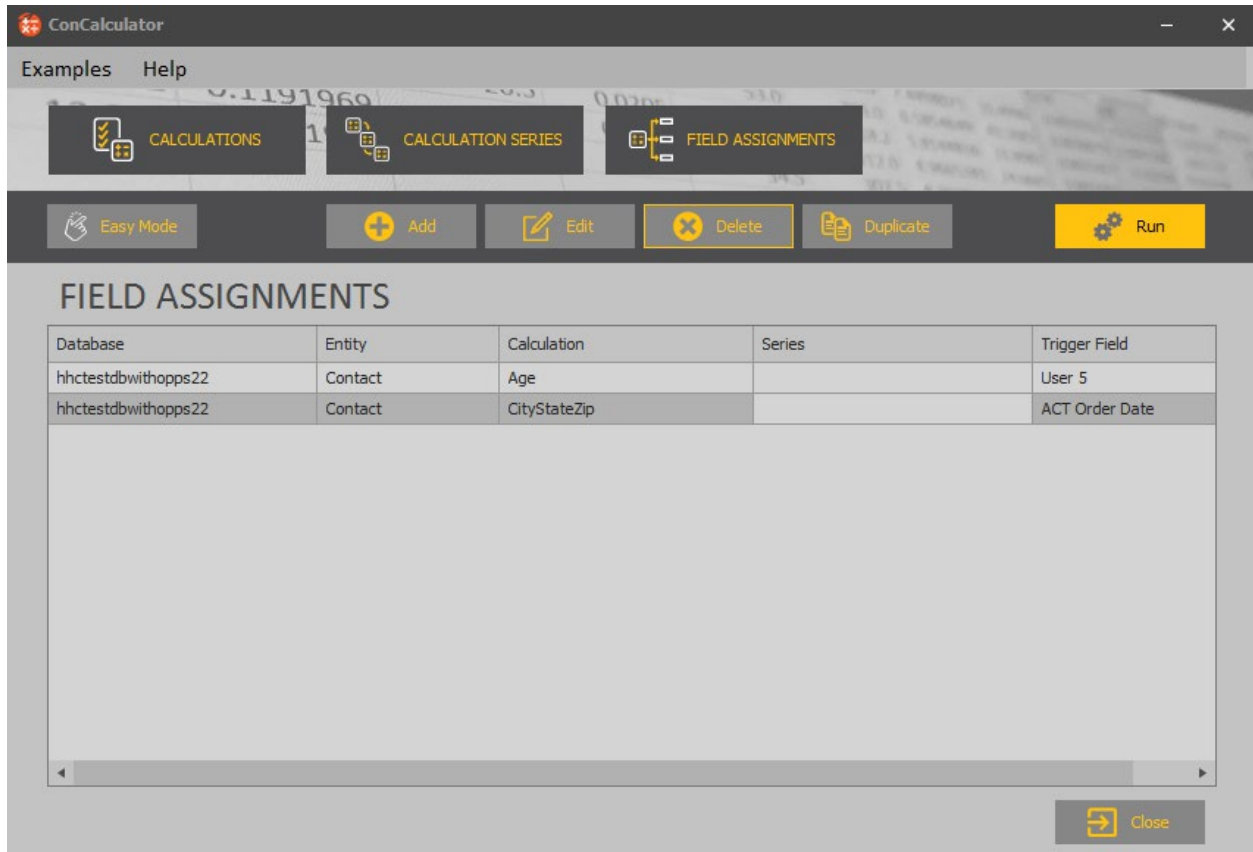
- ACT Installation Notes
- Act License Keys
- ACT License Total
- ACT Order Date
- ACT Platform
- ACT RDP Login_Password

Show Only Numeric Fields Show Only Date Fields

Show Only Yes/No (boolean) Fields

In the example above, the calculation named 'CityStateZip' will be selected and it will trigger off the 'ACT Order Date' field.

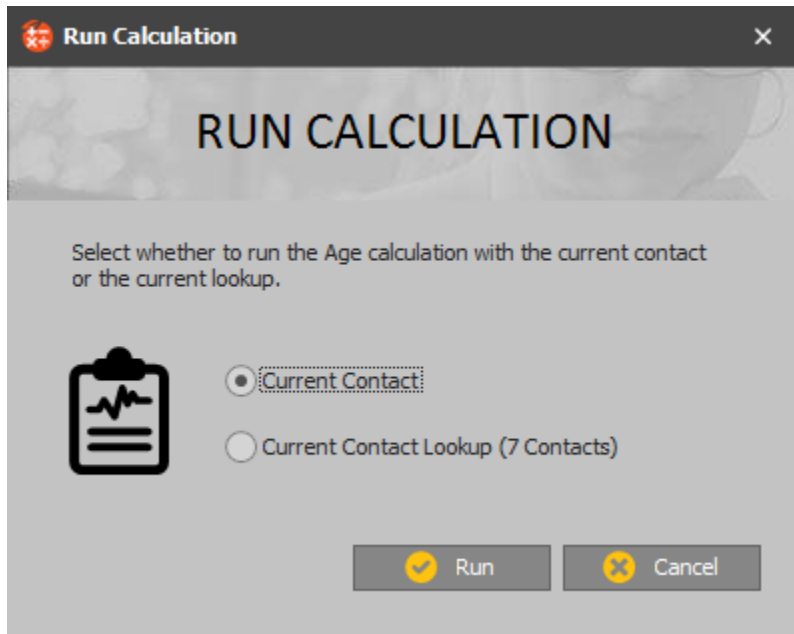
Press 'Accept' button to continue.



Now when changes are applied to the 'Trigger Field', this will flag the calculation to occur and get processed.

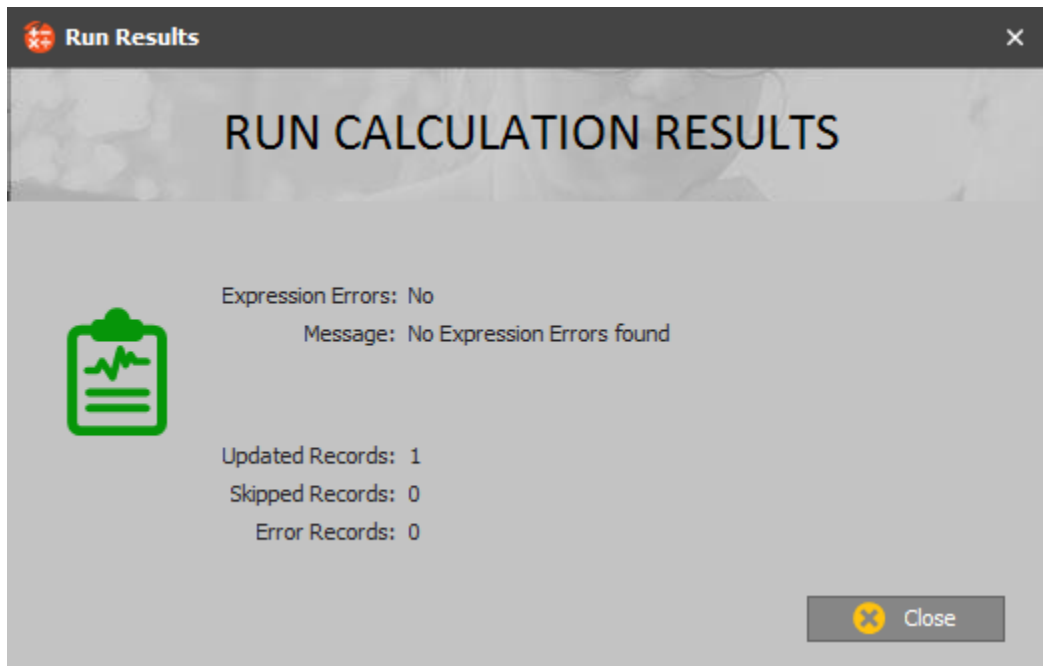
'Run' button:

The 'Run' button is utilized when manually triggering the programmed calculations. In order to use this button, select the required calculation/series from the list provided. Click on 'Run'.



A pop up will appear with the name of the calculation and asking if you want to run the process on the existing 'Current Contact' or the 'Current Contact Lookup'. This could be multiple contacts in the lookup and it will be displayed with the total.

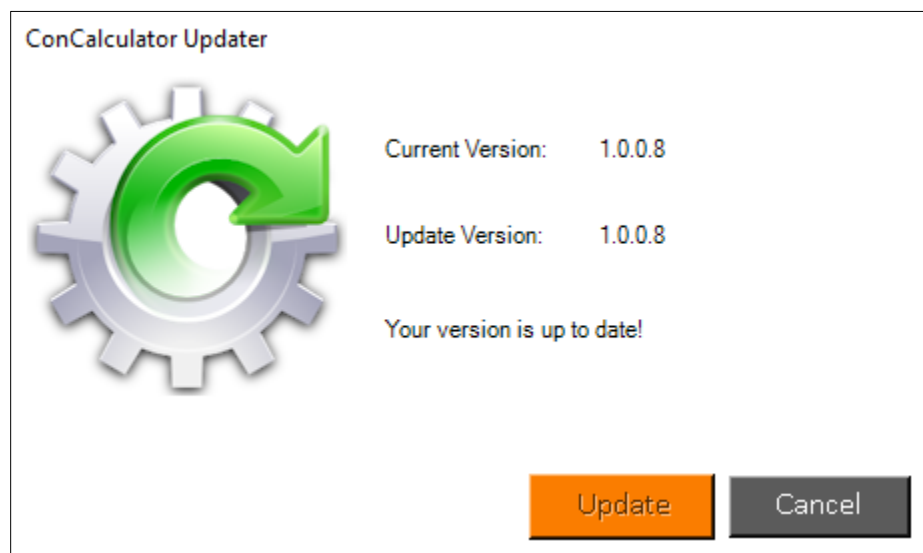
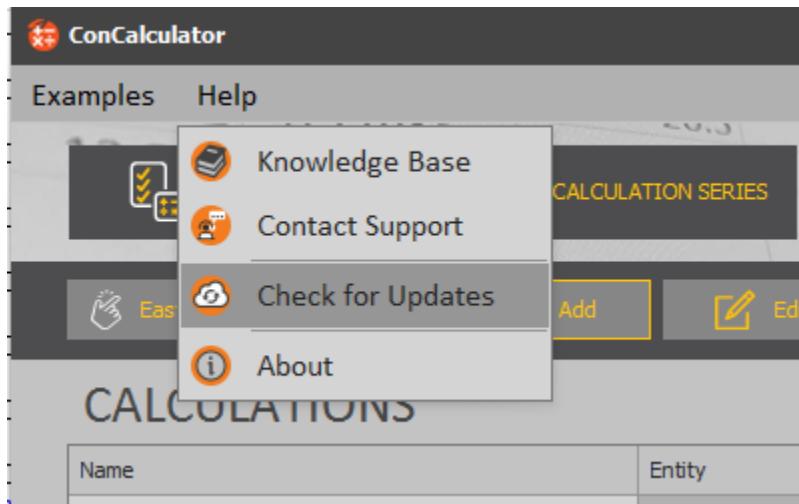
Select the choice needed and press 'Run' button.



The 'Run Results' screen will appear and produce the results from the calculation that was executed. This screen will report on the number of Updated Records that were successful. If a 'Skipped Record' is displayed, this means that the data from the calculation was the same and there was no change to the field. Finally, if there are any 'Error Records' a log will be shown.

Updating the ConCalculator software:

If ConCalculator receives any updates, these will be obtained directly from the application. Click on Help and select 'Check for Updates'.



Simply click on the 'Update' button in order to begin the update process. This will automatically close Act! and update the application. When finished there will be an option to launch Act! again.