PHIL JOHNSTON AND STEVE SIKES

Advanced ActivityHD

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A FEW THINGS FIRST

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Agenda

HERE'S THE PLAN

- Advanced Filter and View Options

- Advanced Saved Answers

- Custom Data for Custom Fields

- Custom Reports using MS Word

- Notes with Banners

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Agenda

HERE'S THE PLAN

- **Advanced Filter and View Options**
  - Advanced Saved Answers
  - Custom Data for Custom Fields
  - Custom Reports using MS Word
  - Notes with Banners

Allows quick change between your favorite folder views

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HERE'S THE PLAN

- Advanced Filter and View Options
- **Advanced Saved Answers**
  - Custom Data for Custom Fields
  - Custom Reports using MS Word
  - Notes with Banners

Focus on date expressions

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HERE'S THE PLAN

- Advanced Filter and View Options
- Advanced Saved Answers
- **Custom Data for Custom Fields**
- Custom Reports using MS Word
- Notes with Banners

Used to provide a
valid list of choices for custom fields

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Agenda

HERE'S THE PLAN

- Advanced Filter and View Options
- Advanced Saved Answers
- Custom Data for Custom Fields
- **Custom Reports using MS Word**
- Notes with Banners

Use **MS Word** for your own custom
report design

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HERE'S THE PLAN

- Advanced Filter and View Options
- Advanced Saved Answers
- Custom Data for Custom Fields
- Custom Reports using MS Word
- **Notes with Banners**

A more visual way to **notify** others of special considerations

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Agenda

- **Advanced Filter and View Options**
- Advanced Saved Answers
- Custom Data for Custom Fields
- Custom Reports using MS Word
- Notes with Banners

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Advanced Filter and View Options

Are you
Repeatedly changing
Column settings and/or
Filter settings?

You want
View Options

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Advanced Filter and View Options

With **View Options**
enabled, you can quickly toggle between named **Options**

From **Personal**
(normal view)

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Advanced Filter and View Options

With **View Options** enabled, you can quickly toggle between named **Options**

To **Demolition due today**

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Advanced Filter and View Options

Here,
Option **Voided**

has **different** columns

and **only** Voided Invoice records

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Advanced Filter and View Options

The **Options** field only shows on your folder views when **View Options** is enabled

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Advanced Filter and View Options

To create a new View Option,

click the edit icon to the right of the Options box.

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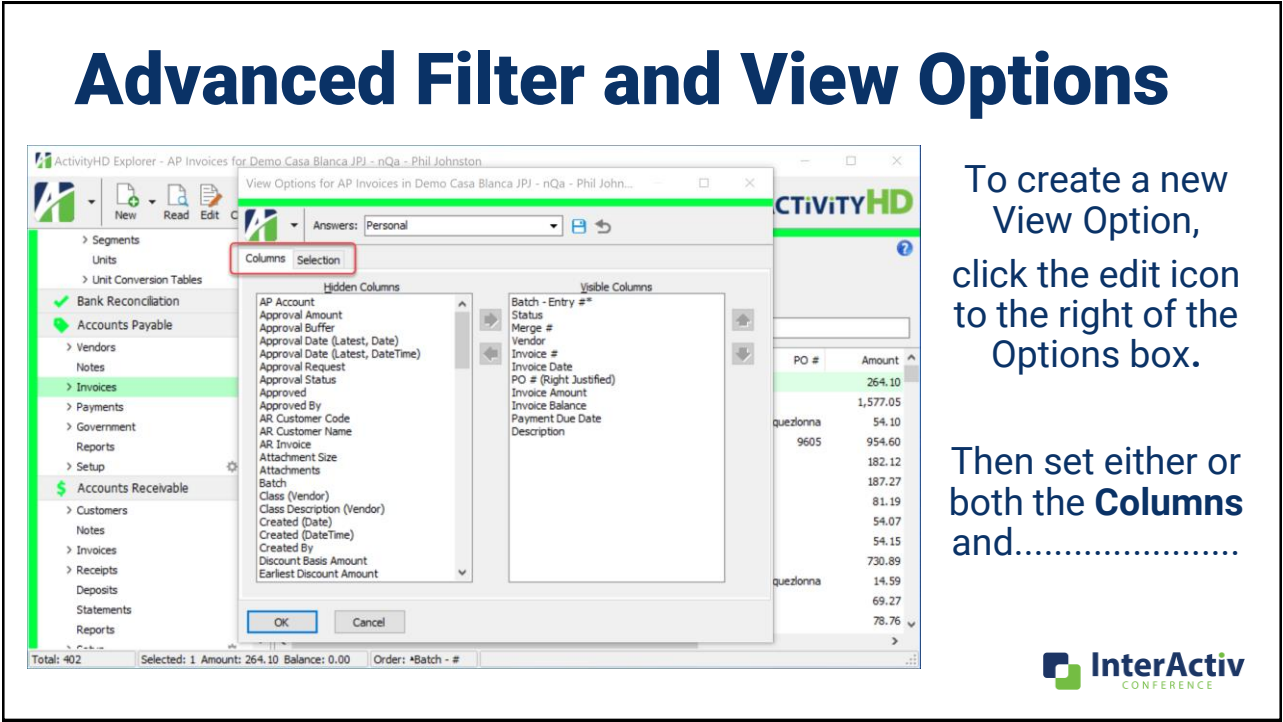# Advanced Filter and View Options

To create a new View Option,

click the edit icon to the right of the Options box.

Then set either or both the **Columns** and.......................

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Advanced Filter and View Options

To create a new View Option,

click the edit icon to the right of the Options box.

Then set either or both the Columns and the **Selection** you wish for this option.

18

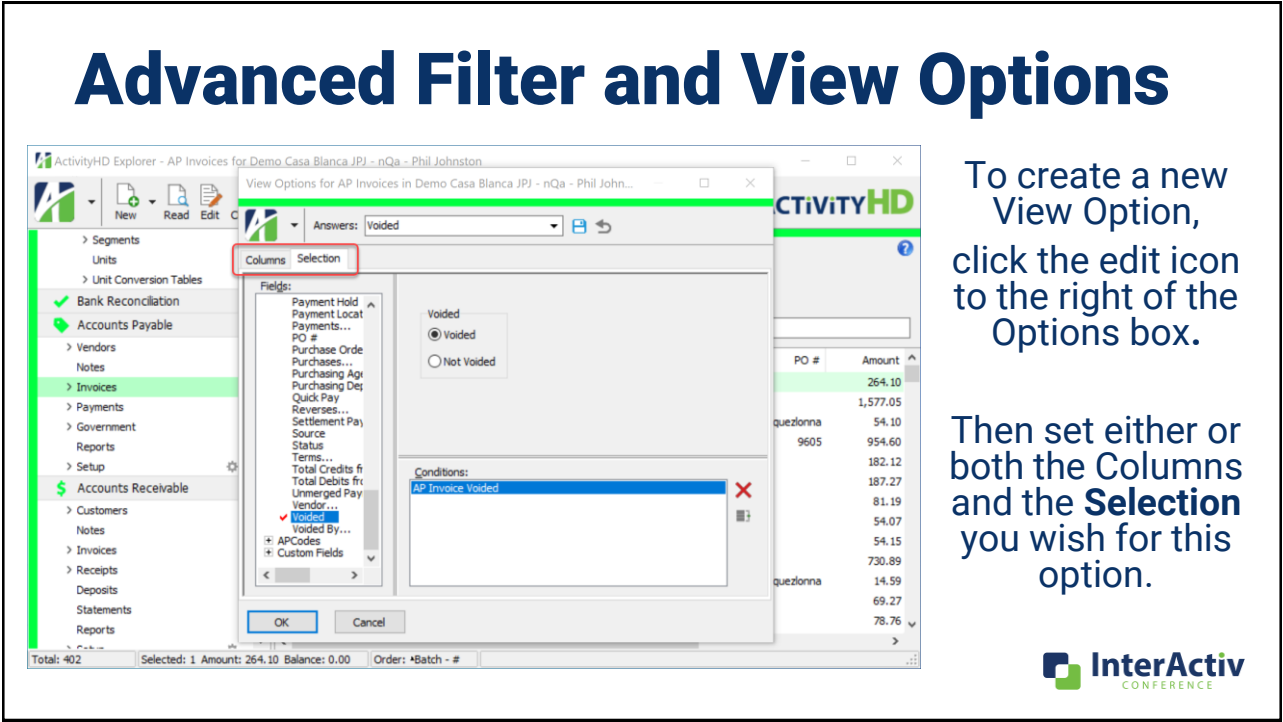# Advanced Filter and View Options

To create a new View Option,

click the edit icon to the right of the Options box**.**

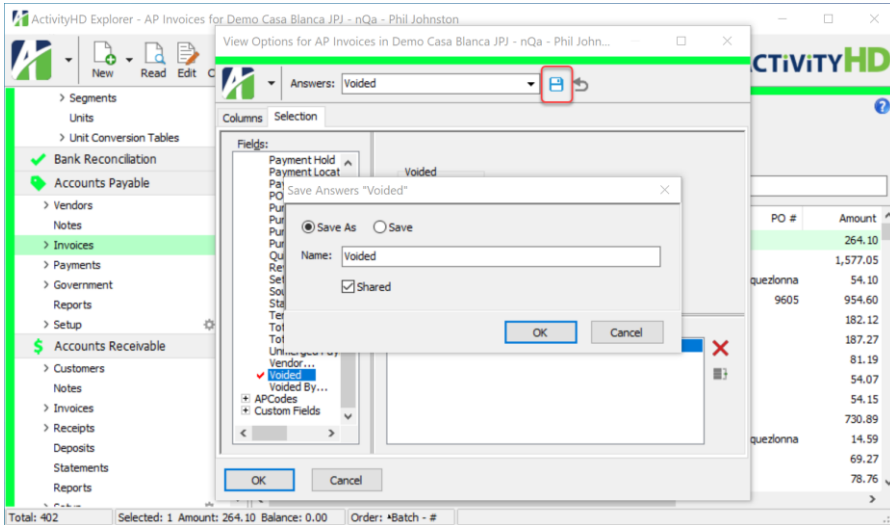**Save as** the **name** you wish for this Option

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All Filters in one folder

The **Filters** folder
Administration > Filters
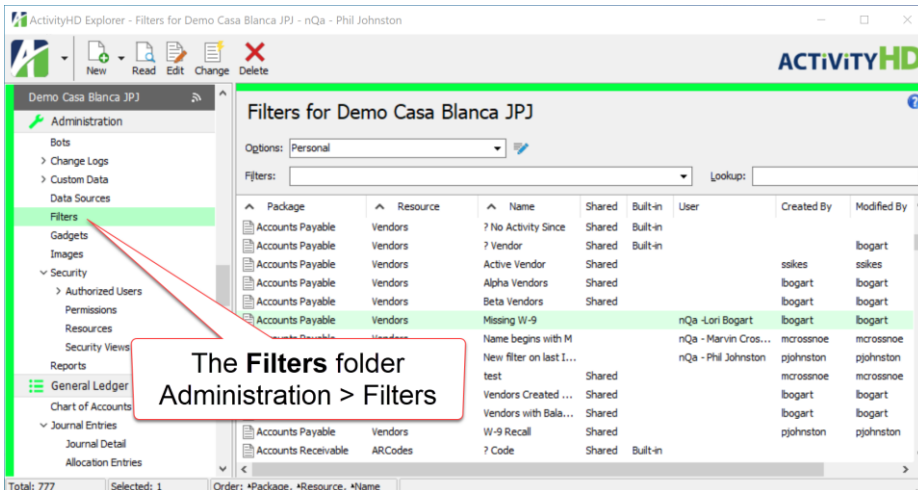
Now
personal filters
can be accessed by administrators

Filters folder
All Filters
From all packages

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Advanced Filter and View Options

?

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Agenda

- Advanced Filter and View Options
- **Advanced Saved Answers**
- Custom Data for Custom Fields
- Custom Reports using MS Word
- Notes with Banners

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Advanced Saved Answers
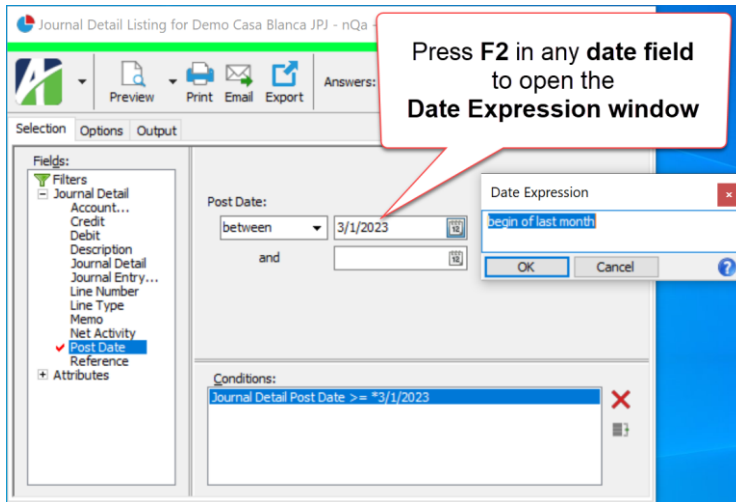
When Saved Answers include a date
you likely want a
Date Expression
to give a 'current' date.

Simple expressions:
- "Today"
- "Begin of last month"

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Advanced Saved Answers

Date Expressions
May refer to period of other calendars.

end of next **period of calendar** "quarter"

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Advanced Saved Answers

Date Expressions

May add or subtract a number of periods within the expression.

- Begin of month + 3 months

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Advanced Saved Answers

Date Expressions
flexible syntax,
but be careful

- End of month + 3 months

won't always give the last day of three months from now.

4/30 + 3 months = 7/30

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Advanced Saved Answers

Date Expressions

If you want the last day of three months from now use...
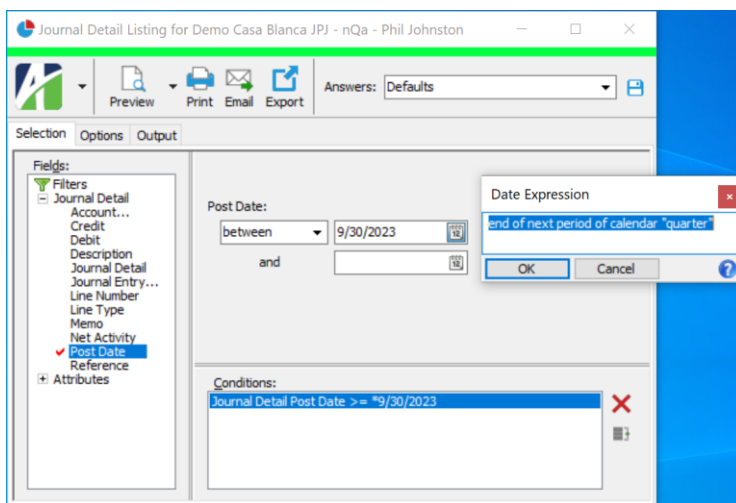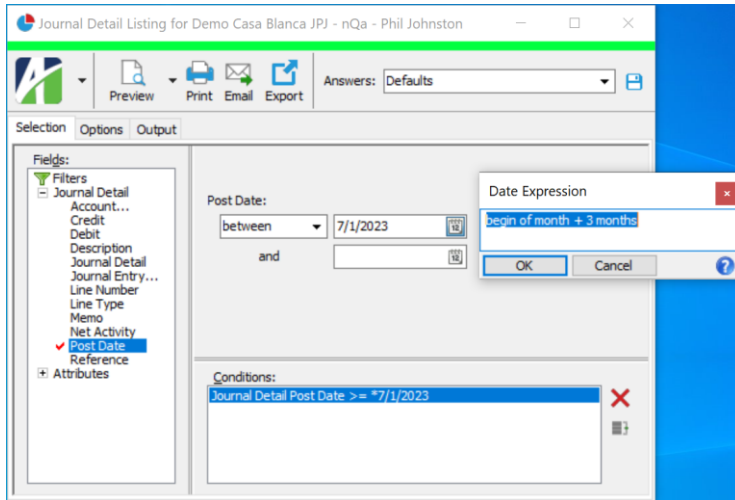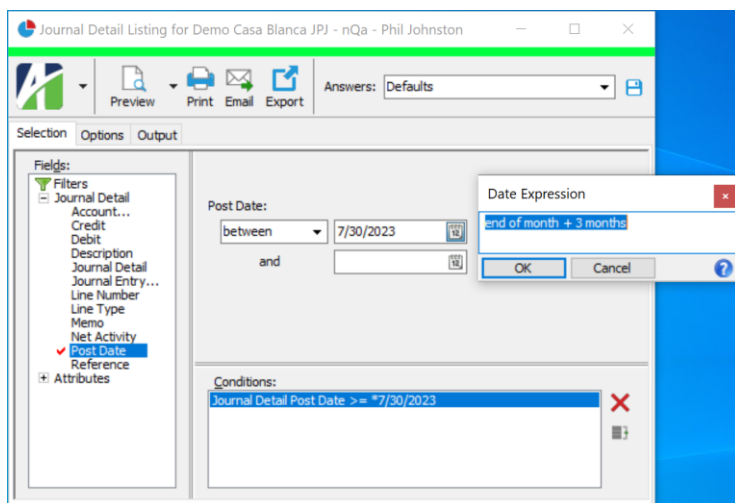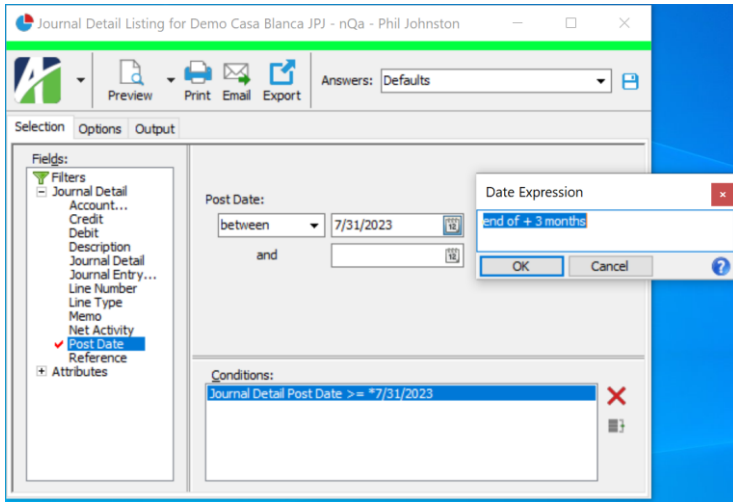
End of + 3 months

27
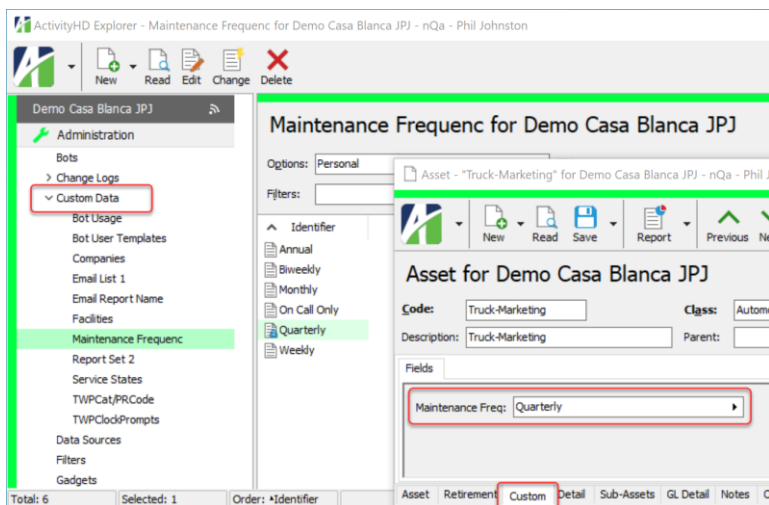
Advanced Saved Answers

?

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- Advanced Filter and View Options
- Advanced Saved Answers
- **Custom Data for Custom Fields**
- Custom Reports using MS Word
- Notes with Banners

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Custom Data for Custom Fields

Allows your own
list of **valid** choices
for custom field values

Such as…
Names for **Sales Regions**
Shift codes for employees
Cubical location code

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Custom Data for Custom Fields

Example Scenario

Custom field
Sales Region
on AR Customers

Has **inconsistent**
spelling or **entries** for the
same Sales Region
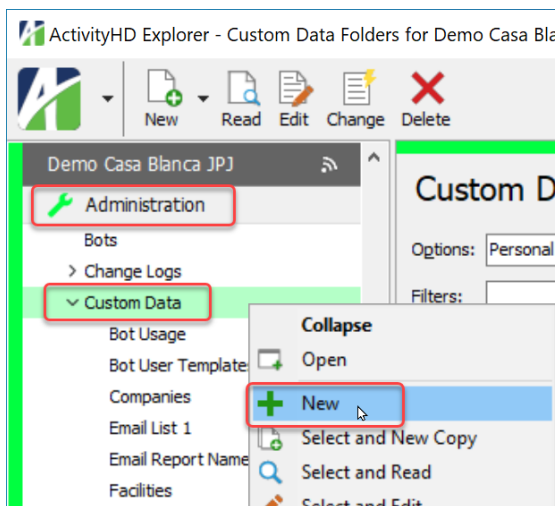
We **need standard options**

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Custom Data for Custom Fields

Create a new

Custom Data sub-folder

that we can populate with item
we wish for our valid options

Navigate to

Administration > Custom Data

Right-click New

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Custom Data for Custom Fields

Create a new
Custom Data sub-folder

Name the sub-folder
Set the data type
Set length limit
for the items

Save

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Custom Data for Custom Fields
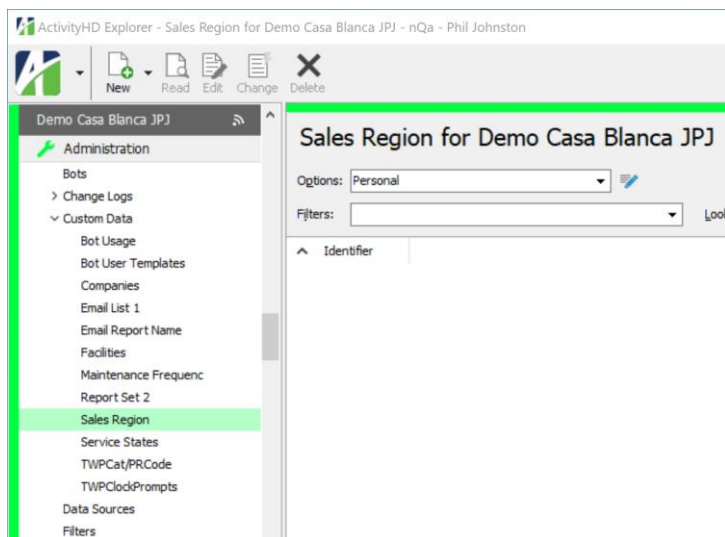
Now we have a new
Custom Data sub-
folder named, "**Sales
Region**"

But this new sub-
folder is empty

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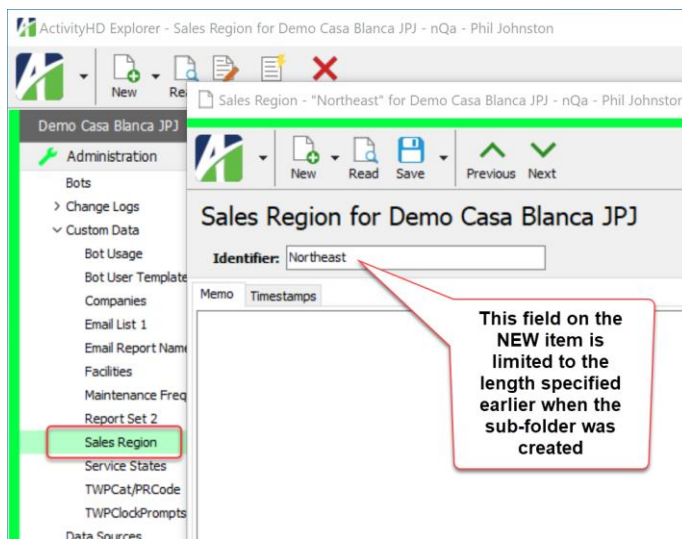
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Custom Data for Custom Fields
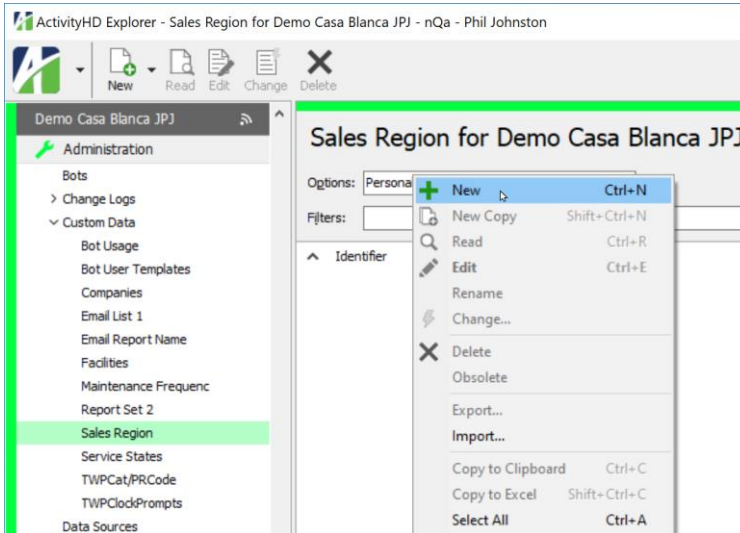
With focus on the
new Custom Data
sub-folder named,
"Sales Region",

Right-click **New**
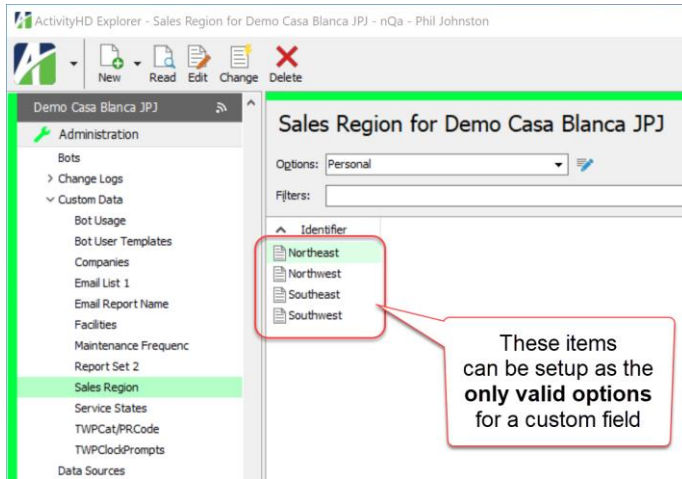
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Custom Data for Custom Fields

With focus on the
new Custom Data
sub-folder named,
"Sales Region",

Enter a new

valid item value

in the **Identifier** field
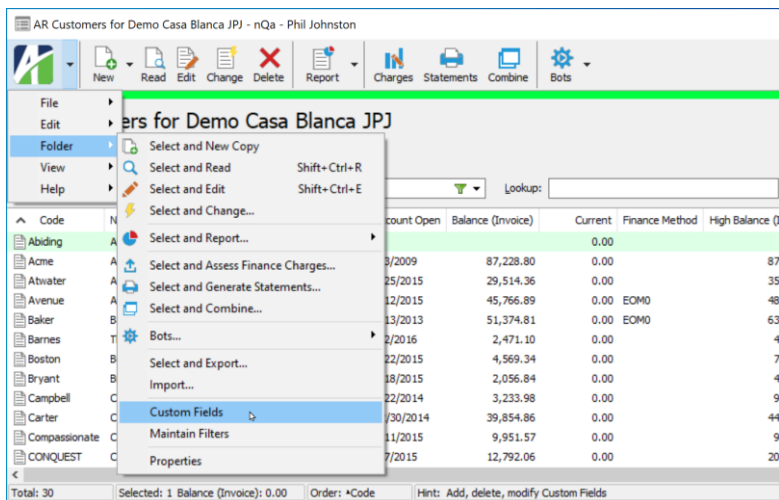
36

Custom Data for Custom Fields

After a few more entries
"Sales Region"
has four **valid** items

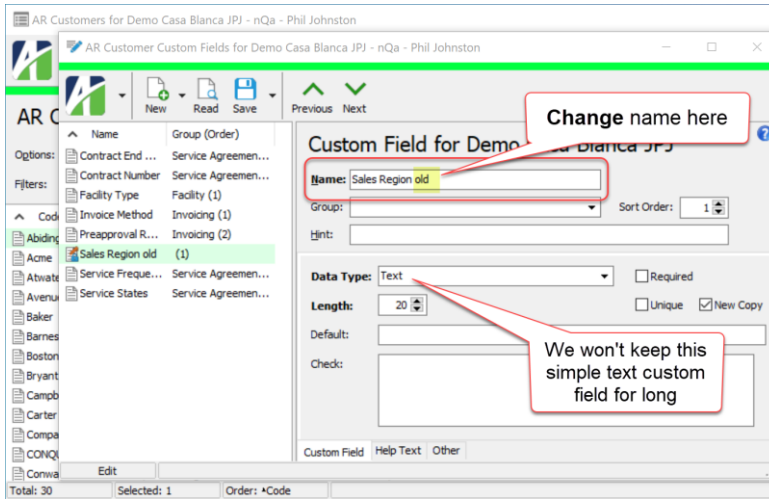# Custom Data for Custom Fields

Now modify the custom fields definitions for AR Customers
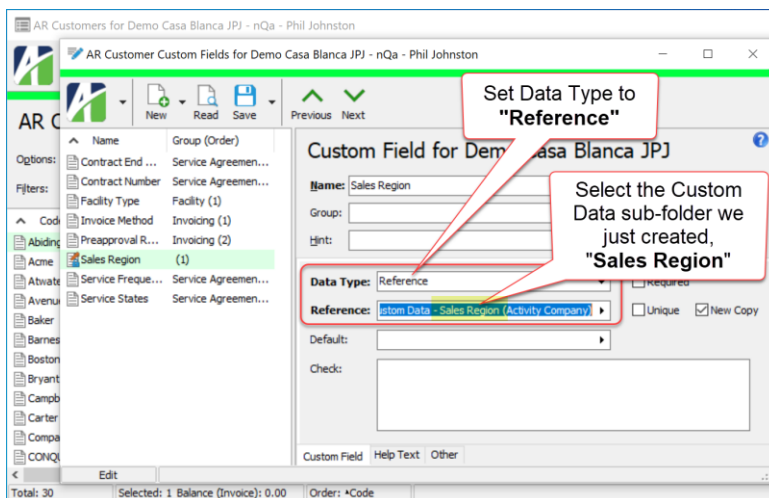
37

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Custom Data for Custom Fields

First, let's **rename** the **old** custom field **out of the way**

It was using a simple text field for the "Sales Region" custom field…
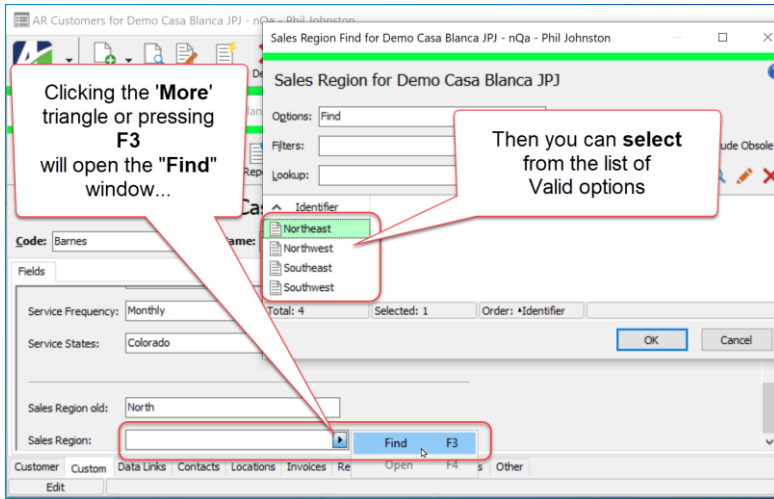
39

Custom Data for Custom Fields

Next, create a **new custom field** with the familiar name,

"**Sales Region**"

But use a "**Reference**" data type that points to the **Custom Data** sub-folder we just created,

Sales Region

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Custom Data for Custom Fields

Now the new custom field offers a **Find** action (**F3**) where you may select from the valid options.

You may still type a value in the field, but it will be validated against the Custom Data sub-folder.

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Custom Data

?

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Agenda

- Advanced Filter and View Options
- Advanced Saved Answers
- Custom Data for Custom Fields
- **Custom Reports using MS Word**
- Notes with Banners

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Custom Reports using MS Word

Customer Credit Reference

In response to your request for credit reference on:

XYZ Company
123 Main Street
City, TX 12345

Primary Contact:
Title:

Our records show…

Date the account was opened: 1/1/2015

Terms: On Receipt

High Balance: $2

Current Balance: $1

Amount Past Due: $0

Have you
ever wanted to
**design
your own report**?

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Custom Reports using MS Word

REPORT MOCKUP

Customer Credit Reference

In response to your request for credit reference on:

XYZ Company
123 Main Street
City, TX 12345

Primary Contact:
Title:

Our records show…

Date the account was opened: 1/1/2015

Terms: On Receipt

High Balance: $2

Current Balance: $1

Amount Past Due: $0

Step 1	Create a Word doc as a sample report
Step 2	Insert Content Controls (Tags) for values you wish to report
Step 3	Load your Word doc as a report design in ActivityHD

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Add Content Controls to Word doc

Customer Credit Reference

In response to your request for credit reference on:

XYZ Company
123 Main Street
City, TX 12345

Primary Contact:
Title:

Our records show…

Date the account was opened: 1/1/2015

Terms: On Receipt

High Balance: $2

Current Balance: $1

Amount Past Due: $0

Create a **Word doc**
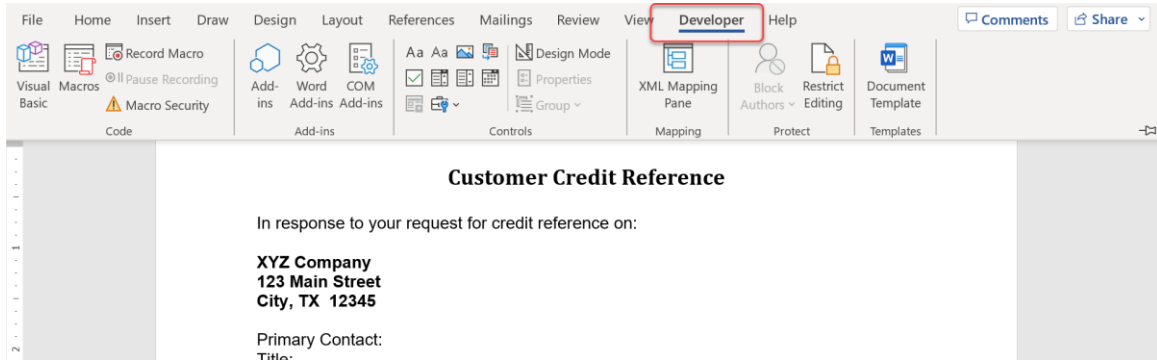with
placeholders
for values
from ActivityHD

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Add Content Controls to Word doc

ENABLE THE DEVELOPER TOOLBAR

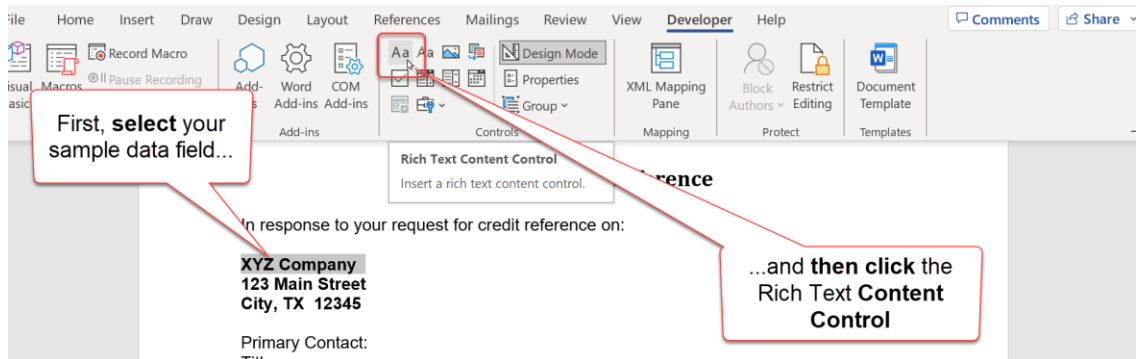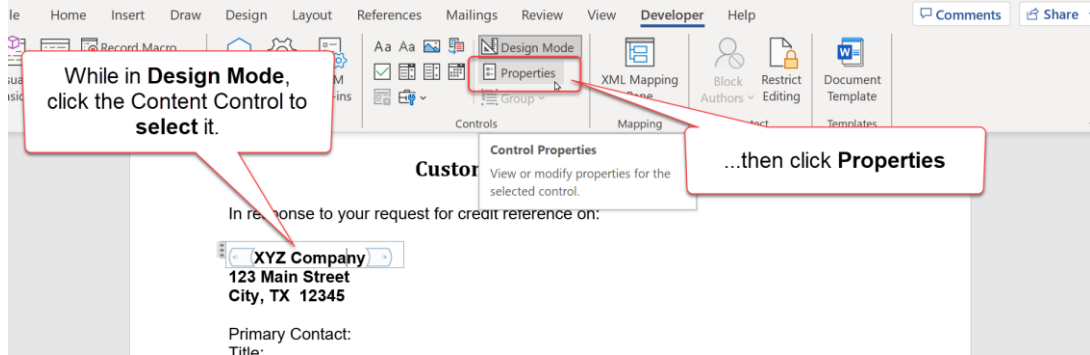**File > Options > Customize Ribbon**   Then **check** the box for "**Developer**"

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Add content controls to word doc

PLACE CONTENT CONTROLS IN THE DOCUMENT

First, **select** your sample data field...

...and **then click** the Rich Text **Content Control**

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Add Content Controls to Word doc

DESIGN MODE **ENABLED**

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Add Content Controls to Word doc

DESIGN MODE **DISABLED**

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Set Content Control Tag Property

CONTENT CONTROL PROPERTIES

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Set Content Control Tag Property
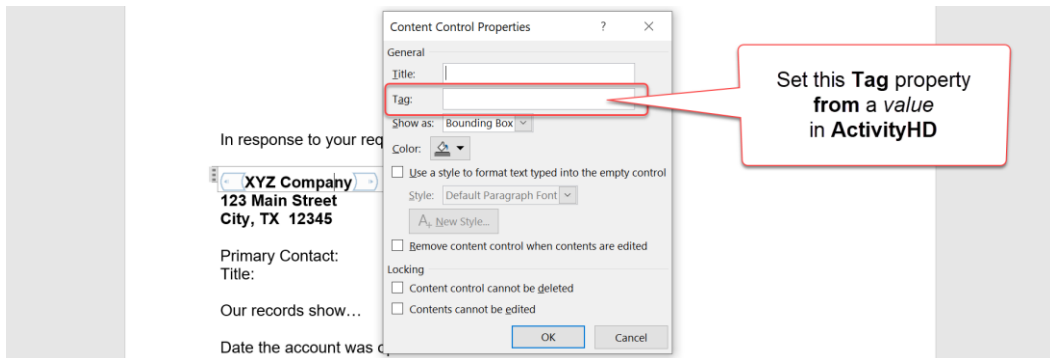
CONTENT CONTROL PROPERTIES

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Assign a Tag value to Properties from the **ActivityHD report Design window**

Word CC Tag

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Assign a Tag value to Properties from the **ActivityHD report Design window**

Word CC Tag

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Assign a Tag value to Properties from the **ActivityHD report Design window**

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Assign a Tag value to Properties from the **ActivityHD report Design window**

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Word CC Tag

Assign a Tag value to Properties from the **ActivityHD report Design window**

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Word CC Tag

Set Content Control Tag Property

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Load Word file

ActivityHD Report Design window

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Save

ActivityHD Report Design window

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Run the new report

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Custom Reports using MS Word

ACTIVITYHD HELP

Contents > Common Features > Report designs

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Custom Reports using MS Word

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Agenda

- Advanced Filter and View Options
- Advanced Saved Answers
- Custom Data
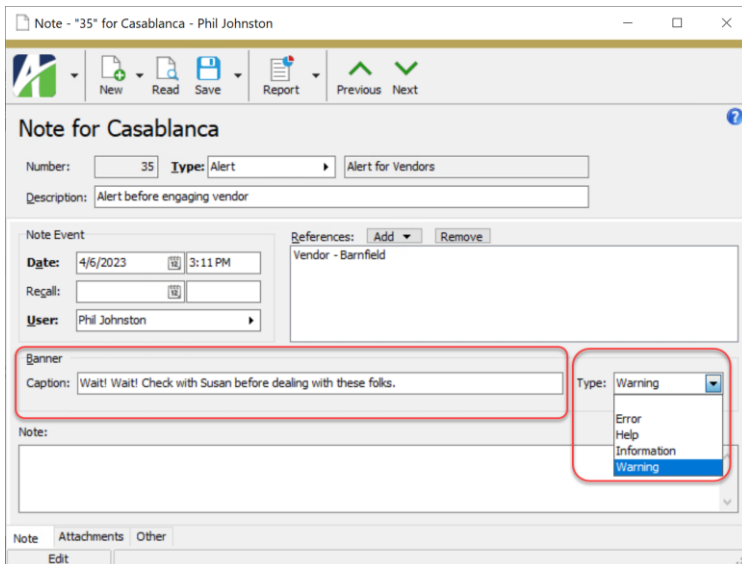- Custom Reports using MS Word
- **Notes with Banners**

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Notes with Banners
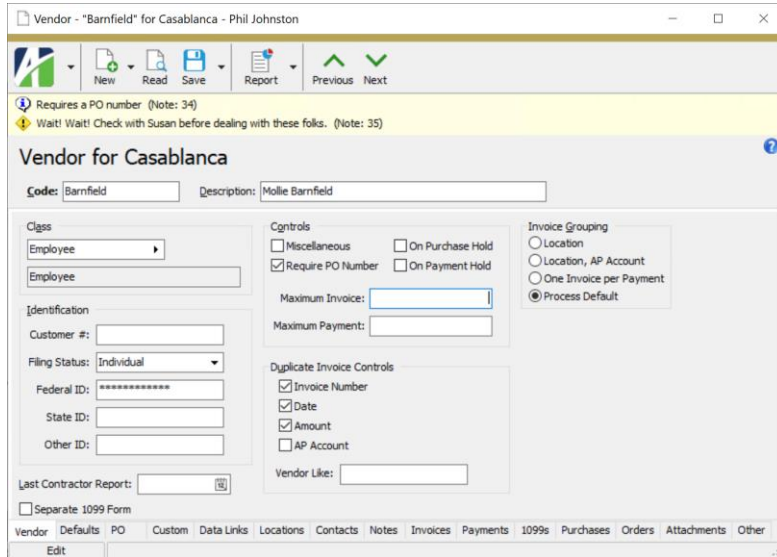
When you want a

more visible notification

for certain records…

Add a **Note** with a **Banner Caption**.

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Notes with Banners

Add a **Note** with a

Banner Caption

Banner Caption and **Banner Type**

are new features on Note records

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Notes with Banners

Banner **Type** controls the **icon** shown in front of the banner caption.

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Notes with Banners

Banner **Type** controls the **icon** shown in front of the banner caption.

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Notes with Banners

Note Banner Captions

only display on primary entities of a package:

- **Vendors**
- **Customers**
- **Assets**
- **Employees**

Clicking the banner will open that Note

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THANKS FOR JOINING!

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https://accountingware.com/help

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