

ACT!2000 NoteHistEx

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Installation and Usage

ACT!2000 NoteHistEx extracts notes and history from an ACT!2000 database into an MS Access database, extending its usefulness in CRW reporting.

The ACT!2000 Notes and History table has 4 major shortcomings when used with Crystal Report Writer (CRW):

- 1 The "Regarding" field, which holds the text of the actual note or history entry, is stored in a "memo" field, and cannot be used in selecting records to be reported
- 2 The "Field Changed" type history records do not include information about the prior value of the field being changed.
- 3 The User who created the note or history is available only as Foreign Key-link to the Contact table.
- 4 The creation of new Forecasted Sales are not included, even though the close/win/loss of sales ARE included

NoteHistEx solves these problems. By running NoteHistEx and using the resulting MS Access table as a "replacement" for the ACT! Note and History table in the database definition for your CRW report, you can overcome those shortcomings:

- 1 The full text of the "Regarding" field is retained as a memo field for reporting purposes. In addition, the first 75 characters are also carried as a separate field (ShortText), which IS "searchable", and can be used in selecting records for inclusion in the report.
- 2 Every "Field changed" history record, in addition to the full "Regarding" field, also includes an "OldValue" field and a "NewValue" field, so you can have easy access to the both. Also included is the OldValueDate, so you can tell how long that value was "in effect".
- 3 Each note and history record has the UserName field, containing the contact name from the user's "My Record" in the ACT! database.
- 4 Each Sale/Opportunity record is included with a "new" RecordType ("99") representing the "Forecasted Sale" event

In addition, NoteHistEx is prepared to work with the "SalesProcessTracking" ACT! Enhancement from The New Hampton Group to report the changes made to the Sales Stages, treating these as "Field Changed" events.

Installation

1. Shut down all running programs.
2. Run **Install_NoteHistEx.exe**.

3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will install **c:\program files\tnhg>NoteHistEx.exe** on your hard-drive, and add the NoteHistEx.exe program to the Programs menu on your Start button. You may add an icon for the program to your desktop, if you wish.

Usage

Start NoteHistEx by selecting it from the Programs menu on your Start button. Selections from your last program execution are “remembered” and displayed for convenient re-use.

Use the [Browse] buttons to select a different ACT!2000 database to use as a source of information to be extracted, or to select a different MS Access database into which you want to extract the data. If you choose an existing MS Access database, you are offered the chance to replace the existing file, or to change your selection. Each execution of NoteHistEx creates a complete database – no “appending” is provided.

Once you have selected the desired source and destination files, click the [Extract] button to build the MS Access database and tables.

When you run CRW, after you have added the ACT!2000 database and its tables to your Table Links, remove the ACT! Notes/History table. Add the MS Access NoteHist database you named when you ran NoteHistEx, then add the tblNoteHist and tblUser tables. Link the newly added tables to the Contact table (Contact:UniqueID – tblNoteHist:ContactID). If you plan on including Group information in your report, link it to the Group table (Group:UniqueID – tblNoteHist:GroupID). If you plan on including Sales information, link it to the Sales table (Sales:UniqueID-tblNoteHist:SaleID). This table can now be used in all your joins. You can also link the tblUser table to the Contact, Group, Activity and Sales tables, if you want access to the Record manager Name in the tblUser table. (See the Table and Linkage chart on page 4 below.)

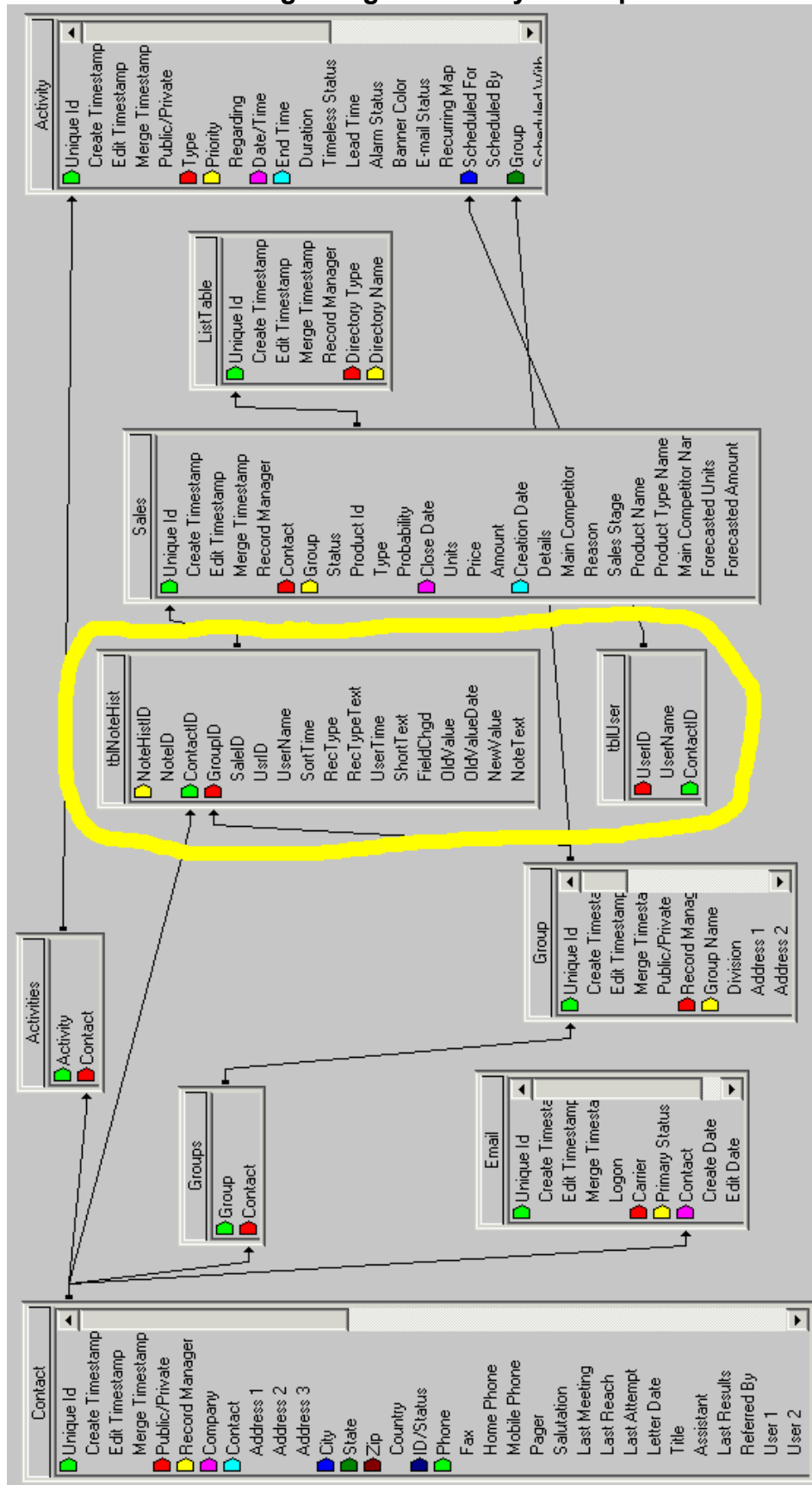
You can select contacts based on ShortText content. You can group contacts based on field changes’ old, as well as new, values (great for pipeline progress reports!) You have ready access to User Names, so you can easily sort or group reports by the person who recorded the history.

See the following table for a chart of the fields in that NoteHistEx creates in the MS Access tblNoteHist table, compared to what is available from the “raw” ACT! table.

Chart of Field Comparisons

NoteHistEx	ACT! As Revealed by CRW	ACT! As revealed by Excel	Description
	Attachment	ATTACHMENT	Drive, folder and filename of attached file - not considered an "event"
ContactID	Contact	CONTACTID	Link to the contact table Primary Key of contact associated with event
	Create Date		
	Create Timestamp	CTIME	When the event was first created - "encoded" format
	Date		
	Date/Time		
	Edit Date		
	Edit Timestamp	ETIME	When the event was last changed by a user - "encoded" format
GroupID	Group	GROUPID	Link to the group table Primay Key of group associated with event
	Merge Date		
	Merge Timestamp	MTIME	When the event was added to THIS database via "import" - "encoded" format
SaleID			Link to the sale table Primary Key of sale associated with event
	Record Manager	USER	Link to contact table Primary Key of User who created event
UserName			"Clear Text" name of the user who created the note or history
NoteText	Regarding	REGARDING	up to 30,000 character MEMO field - complete text for reporting only - cannot be searched
ShortText			The first 75 characters of the NoteText - searchable AND reportable
FieldChgd			The name of the ACT! field whose value was changed
NewValue			The value the ACT! field was changed TO
OldValue			The value the ACT! field was changed FROM
OldValueDate			The date the ACT! field was changed to the OldValue
UserTime	Time	USER_TIME	"Clear Text" date & time of the event - formatted YYYYMMDDHHMM
RecType	Type	TYPE	3-digit code for the type of record - 3=FieldChange, 100=Note, etc.
RecTypeText			"Clear Text" record type - "Field Change", "Note", "Forecasted Sale", "Lost Sale", etc.
NoteID	Unique ID	UNIQUE_ID	Link to the ACT! nohistory table (not usually used)

Table and Linkage Diagram for Crystal Report Writer



The tblNoteHist and tblUser are the tables created by NotesHistoryExtractor.