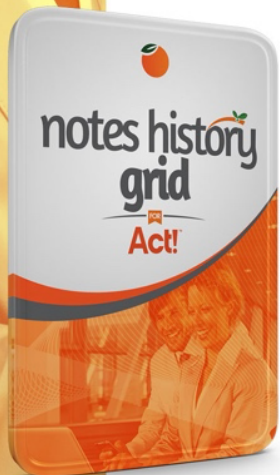


# NotesHistoryGrid

*User Manual*

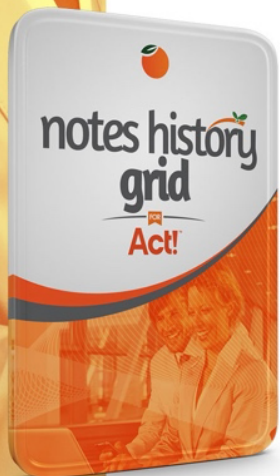


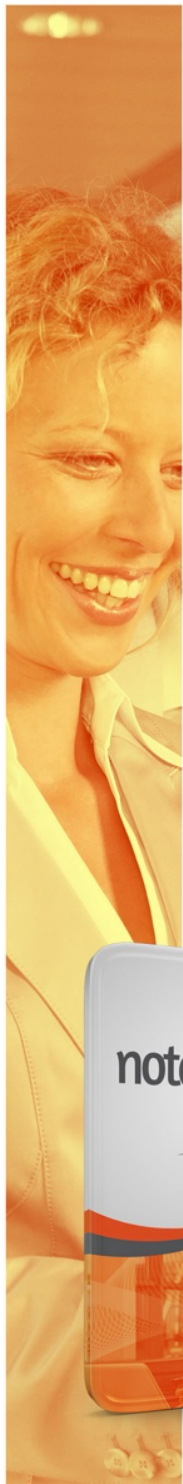
# Notes History Grid (NHG)

## USER GUIDE

Notes History Grid solves the problem of HTML & RTF of Notes & Histories, and allows users to create clean new Notes and/or Histories in plain text, while also allowing them to open existing Notes & Histories to clean them of the old formatting.

Notes History Grid creates a new tab called "Notes/History" under the Contact and aggregates that Contact's Notes & Histories under this tab in an efficient list view grid format. This grid display improves the viewing performance since Act! does not have to use extra system resources to display the formatting of the Notes & History






Notes History Grid - InstallAware Wizard

## Welcome to Notes History Grid


Welcome to the Notes History Grid installation. The InstallAware Wizard is ready to install Notes History Grid on your computer.

**Important**  
Please close all running programs before you continue the installation.



**Software**  
Notes History Grid

**Version**  
1.0.0.7

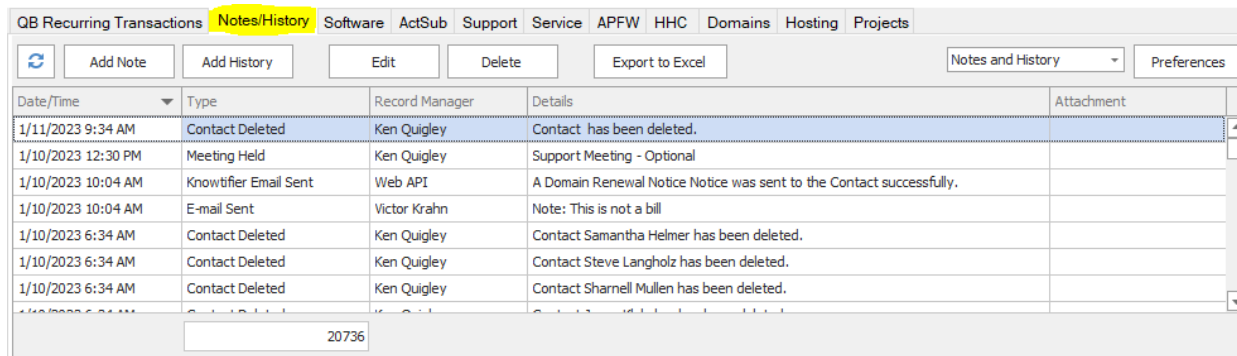
 To continue, click "Next".

## Installation

- Download the installer from <http://www.act4work.com/files/Notes-History%20Grid/> to a location you can easily find. Make sure your Act! program is closed.
- Double-click to launch installer and follow prompts until the installation process is complete. There are very few customization options with the setup, so users are recommended to accept defaults throughout.

## Configuration

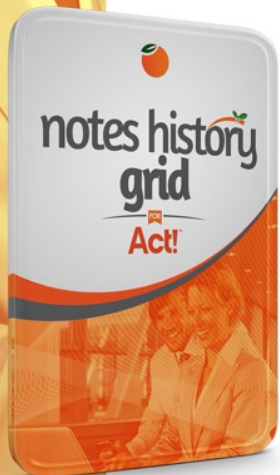
After installation is complete, Act! will launch automatically and you will see a new Tab called Notes/History.



Date/Time	Type	Record Manager	Details	Attachment
1/11/2023 9:34 AM	Contact Deleted	Ken Quigley	Contact has been deleted.	
1/10/2023 12:30 PM	Meeting Held	Ken Quigley	Support Meeting - Optional	
1/10/2023 10:04 AM	Knowtifier Email Sent	Web API	A Domain Renewal Notice Notice was sent to the Contact successfully.	
1/10/2023 10:04 AM	E-mail Sent	Victor Krahn	Note: This is not a bill	
1/10/2023 6:34 AM	Contact Deleted	Ken Quigley	Contact Samantha Helmer has been deleted.	
1/10/2023 6:34 AM	Contact Deleted	Ken Quigley	Contact Steve Langholz has been deleted.	
1/10/2023 6:34 AM	Contact Deleted	Ken Quigley	Contact Sharnell Mullen has been deleted.	

It is important to note that NHG aggregates the Notes & History under one view, but they remain separate under their respective native tabs in Act!.

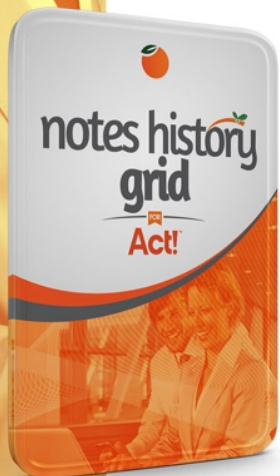
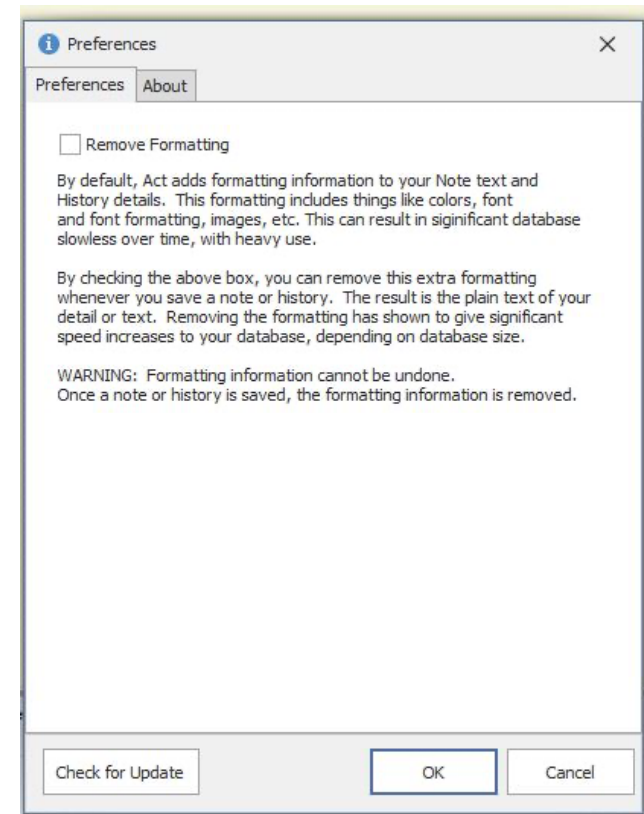
Before using NHG, we recommend going to Preferences in the right corner of this Tab, and choose the formatting default you wish to use.



The Remove Formatting option is always disabled by default due to the unintended impact it can have on database Histories and Notes.

If you check this “Remove Formatting” box, NHG will clear the formatting of all Notes & History it opens and saves. The Notes & History will appear fine at first but clicking OK to close that Note or History will strip it of all Rich Text or HTML formatting.

This cannot be undone, so please consider your needs carefully before setting this preference.



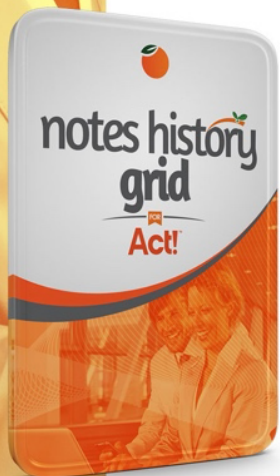
- **Preferences Tab (continued)**

#### **HELP**

- Knowledgebase is hyperlinked to our online KB at [kb.act4work.com](http://kb.act4work.com).
- Contact Support brings you to our support page. The purchase of QuickMeets does not include a support plan, so support for this program is limited to email, chat, and KB. Purchasing QuickMeets with Setup Assistance does NOT include ongoing technical support.

#### **ABOUT**

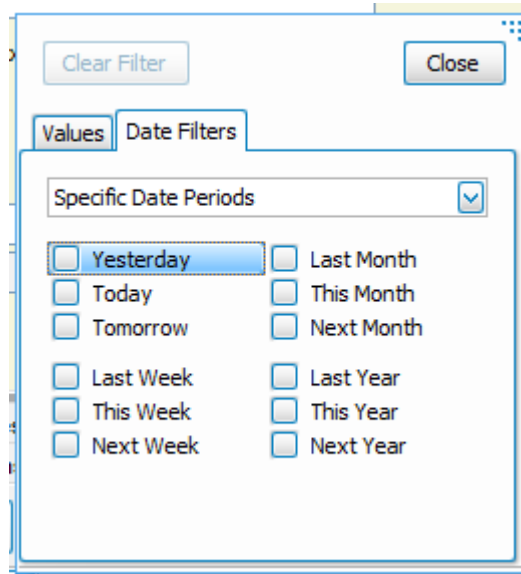
- Check for Updates will check our download server for available “in-version” updates. This feature does not mean the user is entitled to free future version upgrades, just in-version updates.
- This option will display your product information including the name, current build, our website, and the license key.
  - You can also de-activate your product here if you need to install your license on another computer.
- This section also includes a link to shop our other products online



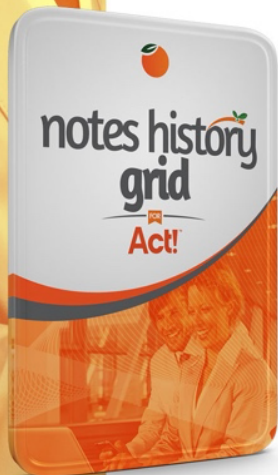


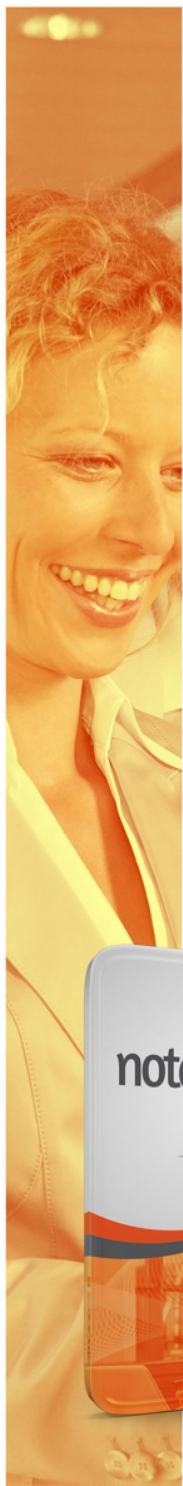
## Notes History Grid – Features:

- *Column Filters*
  - The NHG view includes columns for Date/Time, Type, Record Manager, Details, and attachment, displayed in a grid view. Each of these columns can be filtered by the respective column headers, and the filter options will reflect the data types. For instance:

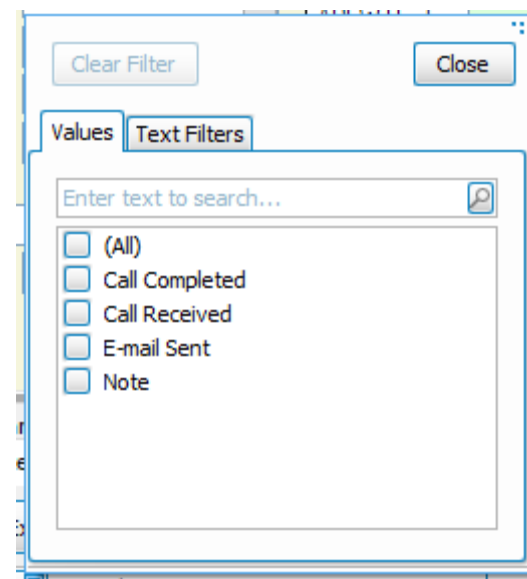


- Date fields will display a wide selection of date filter options (see above)

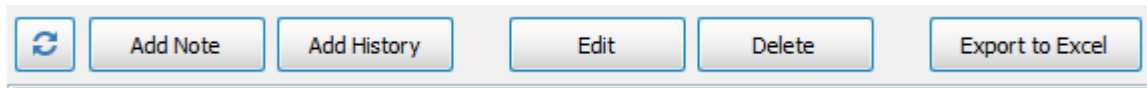




- Types will display the different Notes or History types, and will only display the applicable options for that view
  - This is the same for the Record Manager column.
  - Details are more difficult to filter by name given the unique nature of each, but the text filter box seen to the right allows for a more targeted search by subject.
  - The corresponding Text Filter Tab provides search options with expanded operators like “Equals”, “Begins With”, “Ends With”, “Greater than or Equal to”, and so on.
- *Notes & History Filter*
  - As a reminder, NHG aggregates the Notes & Histories of the Contact under one Tab, it does NOT combine them like Act! 6 and older did, where they were one and the same. Accordingly, we NHG includes a drop-down selector that allows you to view your choice of the following:
    - Notes & History
    - Notes Only
    - Histories Only



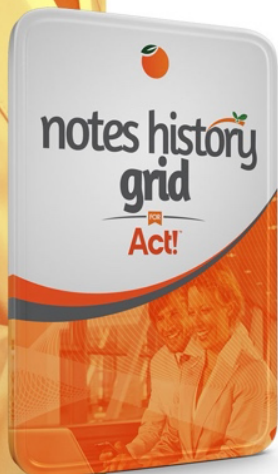




- *Refresh*
  - If the user believes changes to the NHG view are not current, we've included a Refresh button to force a refresh of the grid view. In most cases the displayed view will be current.
- *Edit & Delete Buttons*
  - By selected a line in the grid view and clicking the Delete button, that Note or History will be deleted from the database. This feature does not simply suppress it from the NHG view, it deletes the entity entirely.
  - The Edit button will open the selected Note or History, wherein you can make the appropriate History.

*Please note if you have cleared the Notes or History Editing options in Admin Tab of the Act! Preferences, preventing the editing of Notes & Histories, NHG will comply with those settings. You'll be able to open Histories with the Edit button, but all details will be greyed out.*

*Similarly, any delete command will fail if editing is prohibited.*
- *Add Note and Add History Buttons*
  - The Add Note & Add History buttons do exactly as their name implies, and NHG uses the same Dialogue box as Act! does for these two features.
    - The formatting options remain the same as Act! if you have the Clear Formatting option unchecked in the Preferences. If this option is checked, any Notes or Histories created



with these options will initially have rich text formatting, but this will be stripped when saved.

- Export to Excel
  - This button uses the grid view to structure the data for easy exporting to an Excel file. Clicking this button will open a Save As dialogue box, where you'll be prompted to name the file, or save it with the name of an existing file (please note this latter option will overwrite that that file). The "Save as type" dropdown option allows you choose between current and legacy Excel file formats, but we recommend using the default .XLSX option.
  - Each of the column headers of the exported Excel file will have the applicable filters enabled by default, with the item count displayed at the bottom of the Type column, as it is shown in NHG.

## SUMMARY

Notes History Grid is ideal for users with so many Notes & Histories in their database that it's effecting the performance of Act!. Notes History suppresses the preview screen of both Notes & Histories, and displays the information in a grid view where each entity has only the first line of details.

With the Clear Formatting option enabled in Preferences, it is also effective in clearing the formatting embedded in Notes & History that not only degrade performance, but bloat the size of the database.

**NHG can be purchased at the following link:**

<https://www.keystroke.ca/en/shop/product/notes-history-grid.html>

**This manual was last revised in January of 2023.**

