TOPLINE DASH FAQS

Provided by: TopLine Results Corporation

TopLine Dash FAQS

1. What features are included with TopLine Dash?

Act! v17/16 Features

- Advanced KPI Query: Create key performance indicators off almost any field in your Act! database including custom fields. Choose between a simple single field KPI or a complex KPI based off two fields.
- Advanced KPI Query Drilldown: Double-click on a KPI cell to drill into the result-set.
- Custom Color Palette: Select a custom color scheme for graphs and charts.

Features

- Dashboard Wizard: Quickly set up your dashboard parameters and filters using our Dashboard Wizard. Organize your dashboards in the folder structure by favorites, teams, business functions and more.
- Customizable Views: Add any database fields or custom tables to your list views. Quickly save or reload your favorite dashboards. Copy or drag and drop dashboard panels and columns. Select different users for each panel. Move the legend as needed.
- Custom Tables: View and graph related custom tables side-by-side in the same view, e.g. projects, tickets and contracts.
- Contact Details: Preview an editable contact layout by clicking on any lists of activities, opportunities, queries, histories, notes or products.
- Calendar: Simultaneously view and edit multiple calendars.
- Activities: Create customized activity lists or drill-down pie or bar graphs.
- Opportunities: Create customized opportunity lists or drill-down graphs,
    - auto-calculate counts, gross margins, weighted totals and actual totals. Create follow-up activities directly from your pipeline report.
- Contact Lists: List your most important dynamic or ad-hoc group of contacts and edit them.
- Histories: View, filter and sort by history types and create history summary drill-down graphs. Right click to email history items.
- Products: View your selected products by sales stages, date range in a list or drill-down graph.
- Queries: Perform powerful query lists and corresponding graphical views. Easily create multiple-table queries with SQL statement auto-generation.
- Filtering: Filter by any field in your database.
- Sorting: Sort by any field in your database.

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1099 Quail Court, Suite 200 ◆ Pewaukee, WI 53072 ◆ Phone: 800-880-1960
Fax: 800-878-6641 ◆ Email: info@toplineresults.com ◆ Web site: www.toplineresults.com

- Interactive: Update the dashboard by selecting filters and sorting on the fly. Update multiple opportunities and activities simultaneously. Create look-ups from your notes, histories, activities, opportunities or custom tables.
- Key Performance Indicators (KPIs): View and filter your sales metrics on activities, histories or opportunities, e.g., number of calls, emails, quotes, new opportunities, win/lose ratio calculations and more.
- Sum/total: Sum/total for any numeric or currency field in a list view.
- Reporting: Print your favorite dashboard panels as a PDF and share with others. Create read-only dashboards. Email selected histories.
- What's New Report: View the last synchronization, new contacts, histories, notes, opportunities and activities for each user.
- Export to Excel: Export activities, notes, histories, opportunities, contacts and KPI statistics to MS Excel format.

2. What are the differences between TopLine Dash and the Act! Dashboard?

Topline Dash Manager allows a manager to create more refined reports, especially around the results expected by Act! users.   The results can be analyzed as a KPI readily available in TopLine Dash Manager. TopLine Dash can also be emailed as a report to your users and managers in conjunction with TopLine Alerts.

TopLine Dash's stand out features include complex queries, advanced analytics and graphs.

TopLine Dash also includes ten different dashboards that contain the most popular analytics. TopLine Dash is uniquely positioned for its ability to report on custom tables.

3. Is a trial available for TopLine Dash?

Yes, a fully-functioning 30-day trial is available for download here, http://www.toplineresults.com/downloads.aspx.

4. What kind of training and support is included with TopLine Dash?

A comprehensive TopLine Dash help file is available for free here, http://www.toplineresults.com/toplinehelp/dashhelp16/default.htm.

When you purchase TopLine Dash your purchase includes 30 days of free trouble shooting support. All support requests are submitted to info@toplineresults.com.

If you would like TopLine Results to create your dashboards or provide custom training email us at info@toplineresults.com for pricing.

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5. How does TopLine Dash licensing work?

Any user that needs to view or use the TopLine Dash dashboards or features will need a license. If they do not need to utilize the dashboards or features they do not need a license.

TopLine Dash comes in two different license types, Dash Personal and Dash Manager. The only difference is Dash Personal only allows you to create dashboards with information you entered as a user. TopLine Dash Manager allows you to create dashboards with information entered by all users.

6. What version of Act! is TopLine Dash compatible with?

TopLine Dash is compatible with Act! 2006 – Act! v17. Note, there are different [downloads](#) available for each version.

7. How much is TopLine Dash?

TopLine Dash Manager is $149/license with quantity discounts available, listed below.

5-19 = $129/license
20-49 = $109/license
50+ = $99/license

TopLine Dash Personal is $79/license with quantity discounts available, listed below.

5-19 = $69/license
20-49 = $59/license
50+ = $49/license

8. Are upgrades required for TopLine Dash?

TopLine Results implemented a "hard" upgrade at Act! v16 due to developments in the product. This means any current TopLine Dash client that upgrades Act! to v16 or later will require a TopLine upgrade. This usually only affects TopLine Dash keys purchased prior to August 2013. If the client purchased TopLine Dash keys after August 2013 they will usually not have any TopLine upgrade charges.

TopLine Results does not have yearly upgrade charges and currently does not have another "hard" upgrade planned.

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9. How do I uninstall TopLine Dash?

- Make sure that Act! is closed. It may be necessary to reboot your computer in order to fully release the locks on the files. If you encounter a problem uninstalling, reboot the computer and try again.
- Click Start->Run
- Type:
- regsvr32 /u "C:\Program Files\TopLine Results\TopLine Dash\PDFCreatorPilot2.DLL"
  exactly as you see it above. Be sure to include the quotation marks.
- Open Control Panel
- Open Add/Remove Programs
- Select TopLine Dash and click on the Remove button.
- Close the Add/Remove Programs window and close Control Panel
- Open My Computer and navigate to C:\Program Files\TopLine Results
- Delete the folder called TopLine Dash
- Navigate to C:\Program Files\ACT\ACT For Windows\Plugins
- Delete the file called TLDLoader.dll.

10. Where can I find more information about TopLine Dash?

Below are recommended links for learning more about TopLine Dash.

TopLine Dash Webpage:
 http://www.toplineresults.com/addons/topline-dash.aspx

TopLine Dash Brochure:
http://www.toplineresults.com/media/10440/topline%20dash_actv16.pdf

TopLine Dash – Creating Complex KPIs video:
https://www.youtube.com/watch?v=DhjxibEM7Nw&list=UUiVYbTQmdmVrQufA5ThgwIw

TopLine Dash – Creating Simple KPIs video:
https://www.youtube.com/watch?v=08L5O7tQSsc&index=5&list=UUiVYbTQmdmVrQufA5ThgwIw

TopLine Dash Help File:
http://www.toplineresults.com/toplinehelp/dashhelp16/default.htm

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