TopLine Designer - User

Tabs

Managing Display Columns:

1. Select **Custom Tab**
2. Click on the **blue columns icon**
3. **Use the left and right arrows** to add and remove columns
4. Use the **up and down arrows** to order the columns.
5. Click **OK**
6. The new view appears with selected columns in the selected order.

Sorting:

1. Select **Custom Tab**
2. Click on the **column title**
3. Data is sorted by column data

Filtering:

1. Select **Custom Tab**
2. Click on the **funnel symbol** in the column title.
3. Select from the list of filter options
4. Data is filtered by the column selection
5. The colored funnel indicates a filter is being used

Grouping:

1. Select **Custom Tab**
2. Click on the **group button** in the column title
3. Drag the **title bar** of the column to group to the area.
4. The tab will be grouped by the data in the column
5. Click on the group button again to turn off grouping

Replace Values:

1. Select **Custom Tab**
2. Highlight the row
3. **Right click** to display the context menu
4. Select **Replace Values**
5. Select a method, **Replace or Append**
6. Select a **field**
7. Select a **value**
8. Click **OK**

Office Integration

MS Excel Export:

1. Select the **tab view or list view**
2. Click on the **Export to Excel** icon
3. Enter in a File Name
4. Click **Save**
5. Data from the tab appears in an Excel spreadsheet

Merge to a template to Word:

1. Select the **tab view or list view**
2. Select the **row** you wish to merge
3. **Right Click**
4. Select **Write**
5. Select **Merge to Word**

Merge into separate Word Documents:

1. Select the **tab view or list view**
2. Select the **multiple rows** you wish to merge
3. **Right Click**
4. Select Write
5. Select **Merge to Word**

Look-up Views

Return Contacts:

1. **From Lookup Menu**
2. Select **Custom Table Name**
3. Select **Contacts**
4. Select the **field**
5. Select **search for**
6. Click **Search**
7. Edit the Screen/View (see left)

Return Companies:

1. **From Lookup Menu**
2. Select **Custom Table Name**
3. Select **Companies**
4. Select the **field**
5. Select **search for**
6. Click **Search**

List Views

Create a view:

1. **View, Custom Table View**
2. Your Custom Table List will open
3. Use all the tabs controls for column sorting, filtering and grouping and office integration

TopLine Designer Plus

TopLine Dash Integration:

1. Click on the **TopLine Dash** icon
2. Click on the **New Dashboard** icon
3. Select **Custom Sub-Entity**
4. Select which **Custom Table** to report
5. **Next**
6. Select **Filter by Date**
7. Enter in the date range
8. Select **Filter by Field**
9. Enter in **Field, Operator and Value**

Filter from the List View:

1. Select to view the **List**
2. Select the **Filter** icon next to each field
3. You can now filter or query your dashboard for any fields in the view
4. Filters and queries can be saved when you save a new dashboard.
5. Your dashboard can also be exported to Excel or PDF

Updates

To check for the latest program updates:

1. **Start, Programs**
2. Select **TopLine Results**
3. Select **TopLine Designer Update**
4. Click **Updates**
5. **OK**
6. Select the program to update and click **Check**.
7. **OK**

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