

ListMax Knowledgebase

Requirements:

Act! v21 (and higher)

Act! Plugin (must be installed to each PC separately)

- Act should be closed during install
- After installation, re-open Act.
- Open Contacts (List View). Does ListMax open?
- If not, go to Tools, Manage Add-Ons.
- Is 'Keystroke.Listmax.ActPlugin' listed and enabled?

AFTER INSTALL:

Filters -

Can save previous lookups so they don't have to be performed again. Eg. ID/Status = Customer and Record Manager = Chris Huffman

Save As is used after modifying a previous Filter.

Show/Hide -

Group By - Adds a banner for additional grouping. Eg. Group by Record Manager

Filter Row - Adds a row under the column headers allowing additional filters such as Equals/Contains/Begins with/Greater than/Less than, etc.

Quick Find - Adds a search box to the banner. This searches the entered text in all columns applied. Highlights found text.

Summary Row - Adds a row at the bottom of each column that allows for options such as Sum, Min, Max, Count, etc. Useful for Opportunities.

Lookups -

Clear Filter - Clears all filters applied

Lookup Selected - Performs a lookup for the selected contact(s)

Select All - Highlights all records in the display

Only My Records - Displays only the items connected to the 'My Record' contact.

Columns - Opens the column selector window. Allows customization of the columns displayed.

Create Group - Based off the filters applied and records displayed, create a Group. Choose between all contacts or selected contacts.

Export - Available options are CSV, DOCX, HTML, MHT, PDF, RTF, TEXT, XLS, XLSX