DynamicBackgrounds4Act!

Setup Guide

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Define your own rules to determine the background colour for different types of contacts, companies, groups and/or opportunities based on field values to draw attention.

Make the status of a contact, company, group, or opportunity stand out

Helpful for overdue accounts, missing contact details, VIPs, etc.

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Configure Dynamic Backgrounds

Tools Custom Tables	<u>H</u> elp	_	
Dynamic Background	- L	Preferences]
Dynamic background	s ,	Register	
Act Today Dynamic Backgrounds trial valid until 17/10/2022			– D X
Contacts Companies Groups Opportunities			🕥 Move Up 🛛 😍 Move Down
Field: ID/Status	Operator: Equal To	Value: Employee	Background:
Field: ID/Status	Operator: Equal To	Value: Invoice Overdue	▼ Background:
			Save Cancel

Separate configurations are available for each of the four core entities within Act!, accessible via the buttons at the top for the form – Contacts, Companies, Groups, and Opportunities.

Select a field, an operator and value. Available operators are dependent upon the type of the field selected.

Double-click the colour square to select a colour from the palette.

Multiple criteria can be added to a single entity. The criteria are evaluated in the order displayed on the form, starting from the top of the list.

Use the **Move Up** and **Move Down** buttons to prioritise and deprioritise a criterion.

The background colour will be set by the first criteria that the current record meets.

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Business Ca	ard		Address		Status			
Contact	Anthony		Address 1		ID/Status	Customer 🗸		
Company			Address 2		Referred By	~		
Title		\sim	City	~				
Department		\sim	State	~				
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Business Ca	ard		Address		Status			
Contact	Chris		Address 1		ID/Status	Employee 🗸		
Company			Address 2		Referred By	~		
Title		\sim	City	~				
Department		\sim	State	~				
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Business Ca								
Contact	Arnie		Address 1		ID/Status	Invoice Overdue 🗸 🗸		
Company			Address 2		Referred By	~		
Title		~	City	~				
Department		\sim	State	~				