Method Integration

Actions Guide

Contents

Screen

Clear Screen for New Entry

Definition for Clear Screen for New Entry

Prepares the screen for the entry of a new record; it's done by clearing all fields in all sections to their default values and resetting the screen's Active Record ID.

So Where Would We Use It?

You are entering a customer invoice and just realized it's already been entered by someone else. The Clear Screen for New Entry action would clear all your current entries without saving and call up a new blank screen.

Properties for Clear Screen for New Entry

To set the properties for this action, follow these steps:

1. Select *Clear Screen for New Entry* from the *Action* dropdown list.
2. Check or uncheck *Refresh attached parent grids?* (Attached grids based on the same Table as the screen).
3. Check or uncheck *Refresh attached child grids?*
4. Check or uncheck *Reset Parent Active Record ID?* (When this screen is opened as a child of a 'Show Screen In Popup', 'Go to Screen' or 'Go to Tab Link' action).
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Close Pop Up Screen

Definition for Close Pop Up Screen

Closes the current screen if it was opened using a "Show Screen In Pop Up" action.
Note: this action usually works in conjunction with the "Show Screen In Pop Up" action.

So Where Would We Use It?

Consider for a moment you've just clicked 'Print Preview' on the Invoice screen, which displays the preview in a new pop up window. After your review click 'Close' to close the preview screen.

Properties for Close Pop Up Screen

To set the properties for this action, follow these steps:

1. Select *Close Pop Up Screen* from the *Action* dropdown list.
2. Enter *Internal note* (Optional).
3. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Delete Active Record

Definition for Delete Active Record

This action deletes the current record on the screen. Note: if the screen is based on an accounting table, the record will be marked for deletion, but will not actually be deleted until permission is given from your accounting software.

So Where Would We Use It?

This action is most commonly used in **Delete** buttons. You wish to delete a specific invoice. You select the invoice record you wish to delete and the Delete Active Record action is used to delete the open (or active) record.

Properties for Delete Active Record

To set the properties for this action, follow these steps:

1. Select *Delete Active Record* from the *Action* dropdown list.
2. Enter *Internal note* (Optional).
3. Click **Save & Close** to save changes and close the action properties window, otherwise click **Cancel** to close the window without saving.

Enable/Disable Field/Object

Definition for Enter Value into Field on Screen

Toggle, Always Enable, or Always Disable a field / object on screen.

So Where Would We Use It?

You would use this action on a screen if you wanted to toggle/always disable/ always enable specific fields or objects, of if you do not want certain users to enter data into a specific field. You could then use this action to disable this field on screen for those users.

Properties for Enter Value into Field on Screen

To set the properties for this action, follow these steps:

1. Select *Enable/Disable Field/Object* from the *Action* dropdown list.
2. Select *Field/Object* from the dropdown list.
3. Select *Options* from the dropdown list.

The choices are:

- Toggle – toggles between enable and disable whenever the action is triggered on screen.
- Always Enable – always enables the field / object on screen.
- Always Disable – always disables the field / object on screen.

4. Enter *internal notes* (Optional).
5. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Enter Value into Field on Screen

Definition for Enter Value into Field on Screen

This action enters the specified value into the specified field on the screen. Note: only fields currently placed on the screen are available to be used in this action.

So Where Would We Use It?

Think about entering a new customer in Method. In this case, the shipping address is the same as the billing address. Rather than re-entering the same information, you can click a *Copy* button which copies and enters this information in each appropriate field for shipping, saving you time and effort along the way.

Properties for Enter Value into Field on Screen

To set the properties for this action, follow these steps:

1. Select *Enter Value into Field on Screen* from the *Action* dropdown list.
2. Choose the *Field or Object* where the new value will be entered. Note only the fields and objects currently placed on the screen are available.
3. Select the condition to define the new value from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – Sets the value based off the current record (must be used within a loop).

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise specify a *Value* from the dropdown list.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Go To Field

Definition for Go To Field

Go To Field navigates the user to a specified field on the screen.

So Where Would We Use It?

The Go To Field action is helpful when you want the user to be automatically directed to a specific field for data entry.

Properties for Go To Field

To set the properties for this action, follow these steps:

1. Select *Go To Field* from the *Action* dropdown list.

2. Select *Controls On Screen* from the dropdown list to specify which field the action would apply to.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Go To Screen

Definition for Go To Screen

Go To Screen navigates the user to the specified screen. The screen replaces the current screen in the same window, so this is most useful for building multi-step Wizards.

So Where Would We Use It?

Commonly used on **Go To...** links throughout Method, the Go To Screen action navigates you away from one screen to another screen.

Properties for Go To Screen

To set the properties for this action, follow these steps:

1. Select *Go To Screen* from the *Action* dropdown list.
2. Select the *Screen* from the dropdown list to specify which screen the action will navigate to.
3. Select the condition for *The screen* from the dropdown list.

The choices are:

- Has no relationship – the screen you are going to has no relationship to your current screen.
- Has the same Active Record ID – the screen you going to has the same Active Record ID as your current screen.
- Is a child screen of the current screen – the screen you are going to is a child screen (dependent) your current screen.
- Has a specified Active Record ID – the screen you are going to has a specified Active Record ID.

4. If you selected "*Has a specified Active Record ID"* for Step 3, you must *specify the Record ID*; otherwise, proceed to Step 6.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

5. If you selected *Type In* for Step 4, enter the predefined value and proceed to Step 6; otherwise, specify a value from the dropdown list.
6. Enter *Internal note* (Optional).
7. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Go To Section

Definition for Go To Section

Go To Section navigates to a different section on the screen. This is mostly used when the screen is set to 'Show In Tabs', since this action allows you to specify the tab that is shown.

So Where Would We Use It?

Business is booming and to show your appreciation, you want to tell your customers who currently have a "Balance Due" greater than $500, that they can choose to take up to an additional 3 months to pay, interest-free of course. You begin to enter the criteria and once done, you would like to see a separate screen with this list of customers. Click a button to process the list and you are immediately directed to a new section which contains only the new list. It's that easy!

Properties for Go To Section

To set the properties for this action, follow these steps:

1. Select *Go To Section* from the *Action* dropdown list.
2. Select the *Section* from the dropdown list to specify which section the action will go to.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Go To Tab Link

Definition for Go To Tab Link

Navigates the user to the screen associated with the specified Tab Link. Use "the tab link screen" dropdown list to specify whether there is a relationship between the screen you are coming from and the screen you are going to. For example, you could have a customer screen with a "Create Invoice" button that, when clicked, creates an invoice for the current customer, by setting "is a child screen of the current screen".

So Where Would We Use It?

The Go To Tab Link action is helpful when you want the user to be automatically directed to another screen in the same tab. It is useful for jumping to associated screens with related information.

Properties for Go To Tab Link

To set the properties for this action, follow these steps:

1. Select *Go To Tab Link* from the *Action* dropdown list.
2. Select *Tab Link* from the dropdown list to specify which tab link the action will go to.
3. Identify the relationship for *The tab link screen* field from the dropdown list.

The choices are:

- Has no relationship – the screen you are going to has no relationship to your current screen.

- Has the same Active Record ID – the screen you are going to has the same Active Record ID as your current screen.
- Is a child screen of the current screen – the screen you are going to is a child screen (dependent) of your current screen.
- Has a specified Active Record ID – the screen you are going to has a specified Active Record ID.

4. If you selected "*Has a separate Active Record ID"* for Step 3, you must s*pecify the Record ID*; otherwise, proceed to Step 6.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

5. If you selected *Type In* for Step 4, enter the predefined value and proceed to Step 6; otherwise, specify a value from the dropdown list.
6. Check the *If using with a Calendar, set for Series instead of Occurrence* box; Uncheck to set condition to just one occurrence.
7. Enter *Internal note* (Optional).
8. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Load Web Page

Definition for Load Web Page

Load Web Page Either sets the URL address of a specified Web Page Window control in Method, or launches a new web browser window with the specified URL.

So Where Would We Use It?

If you inserted a Web Page Window object, the Load Web Page action is what you would use to specify the URL for the object. This is used to load an external web page onto a screen in Method, perhaps to link your customer or vendor to their website.

Properties for Load Web Page

To set the properties for this action, follow these steps:

1. Select *Load Web Page* from the *Action* dropdown list.
2. Select the *Target.*

Choices are:

- New Browser Window.
- Web Page Window Object.

3. If you selected "*Web Page Windows Object*", select the web page window from the dropdown; otherwise, skip to step 4.
4. Select the condition to *Enter URL* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Row – sets the condition to a value from a specified row.

5. If you selected *Type In* for Step 4, enter the *Value* and proceed to Step 6; otherwise, specify a value from the dropdown list.
6. Enter *Internal note* (Optional).
7. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cance**l to close the window without saving.

Override Filter By Active Record ID

Definition for Override Filter By Active Record ID

When a customer, vendor or employee logs into Method with a Third Party Login, the screen is automatically filtered to only show records that belong to them. This action can remove the automatic filtering placed on a screen.

So Where Would We Use It?

Useful with Third Party Logins to remove the default screen filter and apply the active record ID.

Properties Override Filter By Active Record ID

To set the properties for this action, follow these steps:

1. Select *Override Filter By Active record ID* from the *Action* dropdown list.
2. Check the Override checkbox.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Retrieve Value from Screen

Definition for Retrieve Value from Screen

Takes a value from the specified field in the specified table and loads it *either* into an Action Result variable, which can then be used in subsequent actions, or *placed into a value on the screen*.

So Where Would We Use It?

You are just starting to enter in some new customer information. You begin to enter the basics, such as company name and contact name. To make life a little easier for yourself, you recently made use of the *Retrieve Value from Screen* action. Now once you're done entering the last name of the contact, the action retrieves those values to populate the billing area for you. You no longer have the tedious task of re-entering the same data and more importantly, you avoid silly data entry errors.

Properties for Retrieve Value from Screen

To set the properties for this action, follow these steps:

1. Select *Retrieve Value from Screen* from the *Action* dropdown list.
2. Select the field from the *Select Value* dropdown list.
3. Define the *Action Result Name* this will load to.
4. Enter *Internal note* (Optional).
5. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Save All Sections

Definition of Save Section

Saves all the values on the screen, and if the screen is based on an accounting table, notifies Method PUSH™ to perform a real-time synchronization with your accounting software.

So Where Would We Use It?

You have just entered in a new customer, and filled in all the sections on the customer list screen. Now you can click save, and this will save all the sections on the screen.

Properties for Save Section

To set the properties for this action, follow these steps:

1. Select *Save all Sections* from the *Action* dropdown list.
2. Enter *Internal note* (Optional).
3. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Save Section

Definition of Save Section

Saves all the values in the specified section, and if the screen is based on an accounting table, notifies Method PUSH™ to perform a real-time synchronization with your accounting software.

So Where Would We Use It?

You've just wrapped up a great phone conversation with a client who has just informed you his mailing address has changed. You want to make sure this is updated under the address section for the customer. Once done, simply click the save button to save that section.

Properties for Save Section

To set the properties for this action, follow these steps:

4. Select *Save Section* from the *Action* dropdown list.
5. Select the *Section* to save.
6. Enter *Internal note* (Optional).

7. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Send to Desktop

Definition for Send to Desktop

Notifies Method PUSH™ to perform a real-time sync between your accounting software and your Method account. Note: this action is already built-in to Save Section, Save All Sections, and Save & New buttons.

So Where Would We Use It?

The Send to Desktop action forces a real-time sync with QuickBooks, regardless if information was changed by you. This is especially helpful if there are multiple users, the Send to Desktop will affect changes to the system for all users to see.

Properties for Send to Desktop

To set the properties for this action, follow these steps:

1. Select *Send to Desktop* from the *Action* dropdown list.
2. Enter Table Name.
3. Select Record ID condition from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify a *Value* from the dropdown list.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Set Active Record ID for Screen

Definition for Set Active Record ID for Screen

Sets the screen's active record to the specified RecordID. A RecordID is a unique value that exists in all Tables.

So Where Would We Use It?

Often used with grids to display a particular record's information on the fields of the screen. The action is often used with the 'Select' link on grids.

Properties for Set Active Record ID for Screen

To set the properties for this action, follow these steps:

1. Select *Set Active Record ID for Screen* from the *Action* dropdown list.
2. Select the condition to define the Active Record value.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – grabs the record ID from a Calendar on screen.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, continue and specify a *Value* in the dropdown list.
4. Check or uncheck the use with Calendar option to set action for the series, rather than occurrence.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Set Color for Field/Object

Definition for Set Color for Field/Object

Set the background color of a field or object.

So Where Would We Use It?

You have users fill out a screen full of questions, but some boxes were missed. You can use this action to change the background color to highlight these boxes so the user can complete the form.

Properties for Set Color for Field/Object

To set the properties for this action, follow these steps:

1. Select the *Object/Field* you want to change the color of.
2. Select the *Value* condition to determine the color from the dropdown list. Note this should be in hex color codes.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field or object from the screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value from Row – sets the condition to a value from a specified row.

- Value from Calendar – sets the condition to a value that is pulled from a value in a Calendar.

3. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify a *Value* from the dropdown list.
4. Enter *Internal note* (Optional).
5. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Show/Hide Section

Definition for Show/Hide Section

Used to show/hide sections on the screen with options to always hide, always show or toggle between those two choices.

So Where Would We Use It?

The billing section on an invoice is auto filled, so we can use this action to hide the "Bill To" section since we do not need to see this by default, but if we want we can show it and edit the values when needed.

Properties for Show/Hide Section

To set the properties for this action, follow these steps:

1. Select *Show/Hide Section* from the *Action* dropdown list.
2. Select *Sections* from the dropdown list.
3. Select *Options* from the dropdown list.

   The choices are:
   - Toggle – Switch between hide and show.
   - Always Hide - This button will always hide the Section.
   - Always Show - This option will always show the Section.

4. Enter *Internal note* (Optional).
5. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Show/Hide Field/Object

Definition for Show/Hide Section

Used to show/hide properties of Field/Object with options to always hide, always show or toggle between those two choices.

So Where Would We Use It?

You may want a User to only view an invoice with no modification capabilities, in which case you can customize the invoice screen for that user so all the buttons except *Refresh* are hidden, preventing them from clicking Save.

Properties for Show/Hide Section

To set the properties for this action, follow these steps:

1. Select Show/Hide Field/Object Section from the *Action* dropdown list.
2. Select the *Field/Object* from dropdown list.
3. Select the *Options* from the dropdown list.

   The choices are:
   - Toggle – Switch between hide and show.
   - Always Hide - This button will always hide the Field/Object.
   - Always Show - This option will always show the Field/Object.

4. Enter *Internal note* (Optional).
5. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Show Message

Definition for Show Message

Shows a custom pop up message to your users.

So Where Would We Use It?

The Show Message action is useful when you want to relay information to a user based on an action or entry that they performed. For instance, if the user tried to save a section with a null entry in a required field, the message could read "Please fill in ALL required fields".

Properties for Show Message

To set the properties for this action, follow these steps:

1. Select *Show Message* from the *Action* dropdown list.
2. Type your message in the text field.
3. Select *Insert into Message* from the dropdown list (Optional). If you choose to not include an insertion in your message, skip to Step 6; otherwise, continue in sequence.

The choices are:
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.

4. Specify the option your users will be able to select.
5. Click **Insert**.
6. Select from the dropdown list how you want the *Show Message* to be used.

The choices are:
- No Decision.

- Provide Yes / No option to the user? ("No" will mean no further actions get processed).
- Provide Yes / No option to the user? ("Ok" assigns True, "Cancel" assigns False). Assign result name which can be used in subsequent actions.

7. Enter *Internal note* (Optional).
8. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Show Screen in Pop Up

Definition for Show Screen in Pop Up

Show Screen in Pop up opens the specified screen in a pop up window.

So Where Would We Use It?

You are entering items on an invoice and realized that you would like to add a new item to the list. In this case, you can click on 'Add New' and it shows the Items screen in pop up, allowing you to add the item. Once completed, close out the window and continue entering your invoice.

Properties for Show Screen in Pop Up

To set the properties for this action, follow these steps:

1. Select *Show Screen in Pop Up* from the *Action* dropdown list.
2. Select the *Screen* you wish to open as a pop up.
3. Identify the relationship between the current screen and the new screen.

The choices are:

- Has no relationship – the screen you are opening has no relationship to the current screen.
- Has the same Active Record ID – the screen you are opening has the same Active Record ID as the current screen.
- Is a child screen of the current screen – the screen you are opening is the child screen (dependent) of the current screen.
- Has a specified Active Record ID – the screen you are opening has a specific Active Record ID.

4. If you selected *Has a specified Active Record ID* for Step 3, you must *specify the record ID*; otherwise, proceed to Step 6.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field or object from the screen.

5. If you selected *Type In* for Step 4, enter the predefined value and proceed to Step 6; otherwise, specify a *Value* from the dropdown list.
6. Enter Screen C*aption* (Optional).

7. Check or uncheck the use with Calendar option to set action for the series, rather than occurrence.
8. Enter *Internal note* (Optional).
9. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Table

Delete Record From Table

Definition for Delete Record From Table

Deletes all records in the specified table that meet the "Where" condition. Note: if an accounting table is specified, the record will be marked for deletion, but will not actually be deleted until permission is given from your accounting software.

So Where Would We Use It?

The Delete Record From Table action is useful when you wish to delete records from a specific table that meet conditions that you specify. *Delete Record From Table* will delete the record from the table, leaving other records that do not match the criteria in the same table intact.

Properties for Delete Record From Table

To set the properties for this action, follow these steps:

1. Select *Delete Record From Table* from the *Action* dropdown list.
2. Select *Table* from the dropdown list.
3. Select *Where Field* from the dropdown list.
4. Select condition from the dropdown list.

The operator choices are:

- Equal to – displays all records that exactly match.
- Greater than – lists all values that are greater than the criterion.
- Less than – lists all values in the field that are less than the criterion.

5. Select *Value* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.

6. If you selected *Type In* for Step 5, enter the predefined value and proceed to Step 7; otherwise, specify a *Value* from the dropdown list.
7. Enter *Internal note* (Optional).
8. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Insert Records into Table

Definition for Insert Records into Table

Create new records in the specified table. You can enter values into as many of the fields in the table that you desire with this one action. Take note of the required fields listed that must be inserted into the table.

So Where Would We Use It?

You want to make sure you apply a payment to the right customer invoice which is currently outstanding. On the invoice screen, a simple click of a button will pay the selected invoice while behind the scenes this action will add a new record in the received payments table.

Properties for Insert Records into Table

To set the properties for this action, follow these steps:

1. Select *Insert Records into Table* from the *Action* dropdown list.
2. Select the table the record will be inserted to.

Take note of the required fields listed (varies with table selection).

3. Select the field from the *Insert into Field* dropdown list.
4. Specify the value from in the *Value to be inserted* dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field or object from the screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value from Row – sets the condition to a value from a specified row.
- Value from Calendar – sets the condition to a value that is pulled from a value in a Calendar.

5. If you selected *Type In* for Step 4, enter the predefined value and proceed to Step 6; otherwise, specify a value from the dropdown list.
6. Enter *Action Result (for Record ID)*; a name for the action result (Optional).
7. Click **Add** and repeat steps 2-5 if necessary.
8. Enter *Internal note* (Optional).
9. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Retrieve Value from Table

Definition for Retrieve Value From Table

Takes a value from the specified field in the specified table and loads it into an Action Result variable, which can then be used in subsequent actions.

So Where Would We Use It?

Useful when building an action set, Retrieve Value From Table will pull the value from a different table and assign it as an Action Result, or place the value directly into a field on the screen. You can then call upon the Action Result elsewhere within your action set.

Properties for Retrieve Value From Table

To set the properties for this action, follow these steps:

1. Select *Retrieve Value from Table* from the *Action* dropdown list.
2. Select *From Table* from dropdown list.
3. Select *From Field* from the dropdown list.
4. Select *Where Field* from the dropdown list.
5. Select condition from the *value is* dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.

6. If you selected *Type In* for Step 5, enter the predefined value and proceed to Step 7; otherwise, specify a value from the dropdown list.
7. Click on **Use Advanced Script** if you would like to query using scripts. Select the *Script* (previously assigned as an action result) from the dropdown list and proceed to Step 13; otherwise, continue with step 8 for regular scripts.
8. Click on **and Where** if you would like to specify more conditions; otherwise, proceed to Step 13 (if applicable). Click on **remove where** to remove this condition.
9. Select *Where Field* from the dropdown list (if applicable).
10. Select *Value Is* (if applicable).

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.

11. If you Selected *Type in,* enter the predefined value; otherwise, select *Value* from dropdown.
12. Click on **and Where** if you have even more conditions to filter by. Repeat Steps 9 through 11; otherwise, proceed to Step 13, (if applicable). Click on **remove where** to remove this condition.
13. Select *If multiple results* from the dropdown list.

The choices are:

- Retrieve First – retrieves the first value stored for the record.
- Retrieve Last – retrieves the last value stored for the record.

- Retrieve Minimum – retrieves the minimum value stored for the record.
- Retrieve Maximum – retrieves the maximum value stored for the record.
- Retrieve Sum – retrieves the sum of all records stored.
- Retrieve Count – retrieves the count of all records stored.

14. Select *Place value in* from the dropdown list.

The choices are:

- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

15. Specify how you will use the results from the *Place value in* dropdown list; enter a name for the Action Result or select the field on the screen to place the value.
16. Enter *Internal note* (Optional).
17. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Start Loop Through Table

Definition for Start Loop Through Table

This must be used in conjunction with the "End Loop Through Table". All subsequent actions will be processed between "Start Loop Through Table" and "End Loop Through Table" for each record in the specified table that meets your criteria. If you want to search through all records, set your "Where" to be "RecordID", "Type In", ">0". Note: each record's Record ID will be temporarily loaded into "Action Result (for Record ID)" so that it is easily available for use in actions inside your loop.

So Where Would We Use It?

The Start Loop Through Table action will loop through the specified table and return any records that match the criteria. The records that match the criteria will have the actions between Start Loop Through Table and End Loop Through Table applied to them.

Properties for Start Loop Through Table

To set the properties for this action, follow these steps:

1. Select *Start Loop Through Table* from the *Action* dropdown list.
2. Select the *Table* from the dropdown list.
3. Select the Field to apply successive actions from the *Where* dropdown list.
4. Select condition from the dropdown list.

The operator choices are:

- Equal to – displays all records that exactly match.
- Not equal to – displays all records that do not exactly mach.
- Greater than – lists all values that are greater than the criterion.
- Greater than or equal to – lists all the values that is greater than or equal to the criterion.
- Less than – lists all values in the field that are less than the criterion.

- Less than or equal to - lists all values in the field that are less than or equal to the criterion.
- Starts With – lists all values in the field that starts with the criterion.
- Ends With – lists all values in the field that ends with the criterion.
- Build Selection List – lists all values from the user-defined list.

5. Select the *Value* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value from Row – sets the condition to a value from a specified row.
- Value from Calendar – sets the condition to a value that is pulled from a value in a Calendar.

6. If you selected *Type In* for Step 5, enter the predefined value and proceed to Step 7; otherwise, specify a value in the dropdown list below.
7. Click ***and Where*** if you have more conditions, note you can add one more condition by clicking the 2nd ***and Where***. If selected then repeat steps 3 through 6. To remove these additional conditions, click on ***remove Where***.
8. Select *Order By* (optional), if you have a preferred way to display the results. Select the 1st field from the dropdown list and select Ascending or Descending order. If desired you can select a 2nd field to order the data by, selecting a field from the dropdown for *then by* and selecting Ascending or Descending order.
9. Select to display *only distinct values* (Optional) for a field from dropdown.
10. Enter the *Action Result* name.
11. Enter *Internal note* (Optional).
12. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

End Loop Through Table

Definition for End Loop Through Table

This must be used in conjunction with the "Start Loop Through Table" action. All subsequent actions will be processed between "Start Loop Through Table" and "End Loop Through Table" for each record in the specified table that meets your criteria.

So Where Would We Use It?

Used in conjunction with the "Start Loop Through Table" action, this allows the user to select the records they wish to include in subsequent actions. All unselected records in the table will be omitted from the action set.

Properties for End Loop Through Table

To set the properties for this action, follow these steps:

1. Select *End Loop Through Table* from the *Action* dropdown list.
2. Enter *Internal note* (Optional).
3. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Update Field in Table

Definition for Update Field in Table

This action updates the value of the specified field in the specified table for all records that meet the "Where" condition.

So Where Would We Use It?

One of your Sales Representatives is moving to a new role, leaving you with the task of reassigning their clients to a new Sales Representative. Simply use this action to update the Sales Representative field to the new person for all clients involved.

Properties for Update Field in Table

To set the properties for this action, follow these steps:

1. Select *Update Field in Table* from the *Action* dropdown list.
2. Select *Table containing the field to update* from the dropdown list.
3. Select *Field* to update.
4. Select the condition for the new *Value* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field or object from the screen.
- Value From Session – sets the condition to a value that results from the current session information.

5. If you selected *Type In* for Step 4, enter the predefined value and proceed to Step 6; otherwise, specify a value in the dropdown list below.
6. Select *Where the Field* from the dropdown list to start setting criteria for the 'Where' condition.
7. Select the operator condition from the dropdown list.

The operator choices are:

- Equal to – displays all records that exactly match.
- Not equal to – displays all records that do not exactly mach.
- Greater than – displays all records that are greater than value.
- Less than – displays all records that are less than value.

8. Select the condition for the *Value* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.

- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value from Calendar – sets the condition to a value that is pulled from a value in a Calendar.

9. If you selected *Type In* for Step 8, enter the predefined value and proceed to Step 10; otherwise, specify a value in the dropdown list below.
10. Enter *Internal note* (Optional).
11. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Action Results

Assign Value to Action Result

Definition for Assign Value to Action Result

This action sets an Action Result variable to a specified value, which can then be used in subsequent actions.

So Where Would We Use It?

You could use this action in a lot of different places; an example would be if you want to store a temporary value to be grabbed later in the action sequence. Note: Action Results can only be used within the same Object/Field they are created in.

Properties for Assign Value to Action Result

To set the properties for this action, follow these steps:

1. Select *Assign Value to Action Result* from the *Action* dropdown list.
2. Enter *Action Result name*.
3. Select *Value* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify a *Value* in the dropdown list below.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Assign Value to Shared Result

Definition for Assign Value to Shared Result

Sets a Shared Result variable to a specified value, which can then be retrieved from other screens using a Get Value From Shared Result action. A Shared Result is different from an Action Result in that an Action Result is only to be used in a list of actions for one object, such as when a button is clicked. On the other hand, a Shared Result can be retrieved anywhere else in Method.

So Where Would We Use It?

There may come a time when you need to use a result from one screen on another screen. For instance, performing a basic math calculation where you need to use the result on a separate screen. Simply assign the value to a shared result which allows it to be used in the actions on another screen.

Properties for Assign Value to Shared Result

To set the properties for this action, follow these steps:

1. Select *Assign Value to Shared Result* from the *Action* dropdown list.
2. Enter *Shared Result Name*.
3. Select *Value* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify a *Value* in the dropdown list below.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Basic Math Calculation

Definition for Basic Math Calculation

This action performs basic math functions between two specified values, and stores the outcome in an Action Result Variable that can be used in subsequent actions.

So Where Would We Use It?

You would use this action when you want to perform any basic math calculation. After some sort of trigger, such as clicking on a button on screen, the action would do the calculation and store it to an action /shared result.

Properties for Basic Math Calculation

To set the properties for this action, follow these steps:

1. Select *Basic Math Calculation* from the *Action* dropdown list.
2. Select *First Value* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, specify *First Value* from the dropdown to the right.
4. Select math operation.

The operator choices are:

- '+' – performs an addition function.
- '-' – performs a subtraction function.
- '/' – performs a division function.
- 'X' – performs a multiplication function.

5. Select *Second Value* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

6. If you selected *Type In* for Step 5, enter the predefined value and proceed to Step 7; otherwise, specify *Second Value* from the dropdown to the right.
7. Select *Rounding Options* from the dropdown list.

The choices are:

- No Rounding – no rounding is performed on result.
- Round Up – the result is rounded up to the nearest integer.
- Round Down Screen – the result is rounded down to the nearest integer.
- Round Closest – the result is rounded up or down depending on which integer is closer.

8. If you selected to use rounding, enter the value to round to.
9. Enter *Action Result name*.
10. Enter *Internal note* (Optional).

11. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Character Function

Definition for Character Function

This action either alters or provides information on a specified value and stores the outcome in an Action Result Variable that can be used in subsequent actions. For example, you may want to join two values together such as "First Name" and "Last Name", or you may want to find out whether a value is numeric.

So Where Would We Use It?

Using the Character Function action really depends on what you are looking to do. Consider for a moment that you're entering information for a new customer and you just finished with the first and last name in two separate fields. Now you want to have this information in one single field containing the full name with the last name followed by the first name separated by a comma. This is easy enough to do using one of the options in the Character Function actions.

Properties

To set the properties for this action, follow these steps:

1. Select *Character Function* from the *Action* dropdown list.
2. Select the *Value* from the dropdown list.

The choices are:

- Type In – Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.
- Value From Row – Sets the condition to a value from a specified row.
- Value From Calendar – Sets the value from a specified calendar.

3. If you selected *Type In* for Step 3 enter the predefined value and proceed to Step 5; otherwise select *Value* from the dropdown list to the right.
4. Select the *action* to perform from the dropdown list. Find and follow the directions for the specific action you wish to use below.

Find Character – Returns the position of the first occurrence of a specified character value in a string. Note: the first character in the string has a value of 0. If the desired character does not exist, -1 will be returned.

1. Select *Find Character* from the *Action* dropdown list.
2. Enter a character in the Find Character field.
3. Enter *Action Result name*.
4. Enter *Internal note* (Optional).
5. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Get Left – Returns all characters of a specified string value, searching forward up to a specified position in a string.

1. Select *Get Left* from the *Action* dropdown list.
2. Select *Value* from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a specified numeric value the user enters manually.
   - Action Result – Sets the condition to a user-defined action result.

3. If you selected *Type In* for Step 2, enter the numeric value and proceed to Step 5; otherwise, select *Value* from the dropdown list below.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Get Length - Returns the number of characters in a string.

1. Select *Get Length* from the *Action* dropdown list.
2. Enter *Action Result name*.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Get Right - Returns all characters of a specified string value, searching backwards up to a specified position in a string.

1. Select *Get Right* from the *Action* dropdown list.
2. Select *Value* from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a specified numeric value the user enters manually.
   - Action Result – Sets the condition to a user-defined action result.
3. If you selected *Type In* for Step 2, enter the numeric value and proceed to Step 5; otherwise, select *Value* from the dropdown list to the right.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Join – Joins two selected values together and assigns the new value as an action result.

1. Select *Join* from the *Action* dropdown list.
2. Select *Join to* condition from the dropdown list.

   The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.
- Value From Row – Sets the condition to a value from a specified row.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Join with comma – Joins two selected values together (separated by comma) and assigns the new value as an action result.

1. Select *Join with comma* from the *Action* dropdown list.
2. Select *Join to* condition from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a value that the user types in manually.
   - Action Result – Sets the condition to a user-defined action result.
   - Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
   - Value From Session – Sets the condition to a value that results from the current session information.
   - Value From Row – Sets the condition to a value from a specified row.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window, otherwise click **Cancel** to close the window without saving.

Join with line break - Joins two selected values together (separated by line break) and assigns the new value to an action result.

1. Select *Join with line break* from the *Action* dropdown list.
2. Select *Join to* condition from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a value that the user types in manually.
   - Action Result – Sets the condition to a user-defined action result.
   - Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.

- Value From Session – Sets the condition to a value that results from the current session information.
- Value From Row – Sets the condition to a value from a specified row.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Join with space - Joins two selected values together (separated by space) and assigns the new value to an action result.

1. Select *Join with space* from the *Action* dropdown list.
2. Select *Join to* condition from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a value that the user types in manually.
   - Action Result – Sets the condition to a user-defined action result.
   - Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
   - Value From Session – Sets the condition to a value that results from the current session information.
   - Value From Row – Sets the condition to a value from a specified row.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Join with tab - Joins two selected values together (separated by tab) and assigns the new value to an action result.

1. Select *Join with tab* from the *Action* dropdown list.
2. Select *Join to condition* from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a value that the user types in manually.
   - Action Result – Sets the condition to a user-defined action result.
   - Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
   - Value From Session – Sets the condition to a value that results from the current session information.
   - Value From Row – Sets the condition to a value from a specified row.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Join with two line breaks - Joins two selected values (separated by two line breaks) and assigns the new value to an action result.

1. Select *Join with two line breaks* from the *Action* dropdown list.
2. Select *Join to* condition from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a value that the user types in manually.
   - Action Result – Sets the condition to a user-defined action result.
   - Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
   - Value From Session – Sets the condition to a value that results from the current session information.
   - Value From Row – Sets the condition to a value from a specified row.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window, otherwise click **Cancel** to close the window without saving.

Replace <<merge>> fields – This action allows you to customize an e-mail or template on an individual basis. It converts database terms such as customer.name into the name of the individual it is meant for, very useful when dealing with mass e-mail or templates.

1. Select *Replace <<merge>> fields* from the *Action* dropdown list.
2. Select *Replace from table* from the dropdown list.

The choices are:
- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.

3. If you selected *Type In* for Step 2,enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Select *Locate using RecordID* from the dropdown list.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.

5. If you selected *Type In* for Step 4, enter the predefined value and proceed to Step 6; otherwise, select a *Value* from the dropdown list.
6. Enter *Action Result name*.
7. Enter *Internal note* (Optional).
8. Click **Save & Close** to save changes and close the action properties window, otherwise click **Cancel** to close the window without saving.

Replace Characters - Replaces specified characters from the selected value with new, user defined characters and assigns the new value to an action result. Note this is case sensitive.

1. Select *Replace Characters* from the *Action* dropdown list.
2. Select the value you would like to *Replace characters* for.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Select *Replace with* from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a value that the user types in manually.
   - Action Result – Sets the condition to a user-defined action result.
   - Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
   - Value From Session – Sets the condition to a value that results from the current session information.

5. If you selected *Type In* for Step 4, enter the predefined value and proceed to Step 6; otherwise select a *Value* from the dropdown list.
6. Enter *Action Result name*.
7. Enter *Internal note* (Optional).
8. Click **Save & Close** to save changes and close the action properties window, otherwise click **Cancel** to close the window without saving.

Yes/No: contains? - Returns True if the value contains the value being queried; otherwise, returns FALSE. The outcome is assigned to an action result. Note: this is case sensitive.

1. Select *Yes/No: contains* from the *Action* dropdown list.
2. Select *Yes/No contains?,* conditions from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a value that the user types in manually.
   - Action Result – Sets the condition to a user-defined action result.
   - Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
   - Value From Session – Sets the condition to a value that results from the current session information.

3. If you selected *Type In* for Step 2,enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Yes/No: starts with? – Returns TRUE if the value starts with the value being queried; otherwise, returns FALSE. The outcome is assigned to an action result. Not case sensitive.

1. Select *Yes/No: starts with?* from the *Action* dropdown list.
2. Select *Yes/No starts with?* conditions from the dropdown list.

The choices are:
- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.

3. If you selected *Type In* for Step 2,enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Yes/No: ends with? - Returns TRUE if the value ends with the value being queried; otherwise, returns FALSE. The outcome is assigned to an action result.

1. Select *Yes/No: ends with?* from the *Action* dropdown list.
2. Select *Yes/No ends with?* conditions from the dropdown list.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Yes/No: is numeric? - Returns TRUE if the value is numeric; otherwise, returns FALSE. The outcome is assigned to an action result.

1. Select *Yes/No: is numeric?* from the *Action* dropdown list.
2. Enter *Action Result name*.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Yes/No: equals? - Returns TRUE if the value is equal to the value being queried; otherwise, returns FALSE. The outcome is assigned to an action result.

1. Select *Yes/No: equals?* from the *Action* dropdown list.
2. Select *Yes/No equals*? conditions from the dropdown list.

   The choices are:
   - Type In - Sets the condition to a value that the user types in manually.
   - Action Result – Sets the condition to a user-defined action result.
   - Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
   - Value From Session – Sets the condition to a value that results from the current session information.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Seek next in selection list – Based on a specified value, returns the next value from a selection list.

1. Select *Seek next in selection list* from the *Action* dropdown list.
2. Select *Current Value* conditions from the dropdown list.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Seek previous in selection list – Based on a specified value, returns the previous value from a selection list.

1. Select *Seek previous in selection list* from the *Action* dropdown list.
2. Select *Current Value* conditions from the dropdown list.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, select a *Value* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Date Add

Definition for Date Add

This action takes a date/time value, adds a date or time interval to it, and stores the outcome in an Action Result that can be used in subsequent actions.

So Where Would We Use It?

Useful in date/time functions, the Date Add action adds a predefined date or time interval (such as 30 days or 3 hours) to the Starting Date. The result (30 days from Start Date or 3 hours from Start Time) can be saved as an Action Result and used later.

Properties for Date Add

To set the properties for this action, follow these steps:

1. Select *Date Add* from the *Action* dropdown list.
2. Select *Starting date* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, specify a *Starting date* from the dropdown to the right.
4. Select *Number to add* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

5. If you selected *Type In* for Step 4, enter the predefined value and proceed to Step 6; otherwise, specify *Number to add* from the dropdown to the right.
6. Select *Date/time Interval* from the dropdown list.

The interval choices are:

- Seconds
- Minutes
- Hours
- Days
- Months
- Years

7. Enter *Action Result name*.
8. Enter *Internal note* (Optional).
9. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Date Difference

Definition of Date Difference

This action compares the difference between two date/time values, and stores the outcome in an Action Result Variable that can be used in subsequent actions.

So Where Would We Use It?

Useful when comparing two date/time objects to calculate time difference for duration.

Properties of Date Difference

To set the properties for this action follow the example steps below:

1. Select *Date Difference* from the *Action* dropdown list.
2. *Select first date* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Row – sets the condition to a value from a specified row.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, specify a *Value* in the dropdown list below.

4. *Repeat steps 1-3 for Select second date* from the dropdown list.

5. Select which days you wish to exclude.

6. Select the units to retrieve *time difference* in from the dropdown list.

The choices are:

- Seconds
- Minutes
- Hours
- Days
- Months
- Years

7. Enter an *Action Result name*.
8. Enter *Internal note* (Optional).
9. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Date Function

Definition of Date Function

This action allows you to find a specific date based off your starting date.

So Where Would We Use It?

Useful when trying to extract certain parts of a date such as the month, date or only the year to be used with action results or subsequent actions.

Properties of Date Function

To set the properties for this action, follow the steps below:

1. Select *Date Function* from the *Action* dropdown list.
2. Select the *date* value from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.

- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

3. If you selected *Type In* for Step 2, enter the predefined value and proceed to Step 4; otherwise, specify a *Value* in the dropdown list below.

4. Select the *function* from the dropdown list.

The choices are:

- Get Day of week.
- Get Day of Month.
- Get Month of Year (Text).
- Get Month of Year (Number).
- Get First Day of Month.
- Get Last Day of Month.
- Get First Day of Year.
- Get Last Day of Year.
- Get [Choice of: Mon, Tues, Wed, Thurs, Fri, Sat, Sun] After.
- Get [Choice of: Mon, Tues, Wed, Thurs, Fri, Sat, Sun] Before.
- Get [Choice of: Mon, Tues, Wed, Thurs, Fri, Sat, Sun] On or After.
- Get [Choice of: Mon, Tues, Wed, Thurs, Fri, Sat, Sun] On or Before.
- Convert To UTC Date Time.
- Format Date.

5. Enter an *Action Result name*.
6. Enter *Internal note* (Optional).
7. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Get Value from Shared Result

Definition for Get Value from Shared Result

Retrieves a Shared Result variable, and assigns it to a local Action Result. A Shared Result is different from an Action Result in that an Action Result is only to be used in a list of actions for one object, such as when a button is clicked. On the other hand, a Shared Result can be retrieved anywhere else in Method.

Note: Get Value from Shared Result should be used in conjunction with "Assign Value to Share Result".

So Where Would We Use It?

You just created a New Lead and you would like to enter an activity for this Lead. To do so, use the Assign Value to Shared Result action after you have created the New Lead. Then on the New Activity screen you can use the action Get Value from Shared Result to populate the customer name for your new activity.

Properties for Get Value from Shared Result

To set the properties for this action, follow these steps:

1. Select *Get Value from Shared Result* from the *Action* dropdown list.
2. Enter *Get From: Shared Result Name*.
3. Enter *Assign To: Action Result Name*.
4. Enter *Internal note* (Optional).
5. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Export Grid to Excel

Definition for Export Grid to Excel

This action opens a pop up window with the contents of the specified grid exported in Microsoft Excel format.

So Where Would We Use It?

Use this action to send data contained in a grid to Excel for printing or data manipulation. For instance, you can send the Items grid to Excel for conducting onsite or offsite inventory, allowing someone to verify and alter On Hand quantities via Excel.

Properties for Export Grid to Excel

To set the properties for this action, follow these steps:

1. Select *Export Grid to Excel* from the *Action* dropdown list.
2. Select *Grid/Table* from the dropdown list.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Export Grid to PDF

Definition for Export Grid to PDF

This action opens a pop up window with the contents of the specified grid exported in PDF format.

So Where Would We Use It?

All the information you need is in a grid, but in order to prep for a meeting you've decided you will export this information to a PDF and send it to those attending the meeting next hour. This is very easy to accomplish and makes you look prepared and more professional too. Have a good meeting!

Properties for Export Grid to PDF

To set the properties for this action, follow the example steps below:

1. Select *Export Grid to PDF* from the *Action* dropdown list.
2. Select *Grid/Table* from the dropdown list.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Export Grid to RTF

Definition for Export Grid to RTF

This action opens a pop up window with the contents of the specified grid exported in Rich Text Format (RTF), which can be opened in word processing software like Microsoft Word.

So Where Would We Use It?

Export Grid to RTF is useful to send data contained in a grid to an RTF pop up window for sharing using email or a word processing software.

Properties for Export Grid to RTF

To set the properties for this action, follow these steps:

1. Select *Export Grid to RTF* from the *Action* dropdown list.
2. Select *Grid/Table* from the dropdown list.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Insert New Row into Grid

Definition for Insert New Row into Grid

Insert a new entry into the specified grid. This has the same effect as clicking the 'New...' link at the bottom of the grid.

So Where Would We Use It?

You've just noticed you need to make an inventory adjustment. Not a problem, you simply go to the appropriate grid in Method and with the click of a button, such as "new", you're all set to make the adjustment and update the information. This action inserts the new row into the grid and you're all done. Yes, it is that easy.

Properties for Insert New Row into Grid

To set the properties for this action, follow these steps:

1. Select *Insert New Row into Grid* from the *Action* dropdown list.
2. Select *Grid/Table* from the dropdown list.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Get Sum

Definition for Get Sum

Gets the summary of all numeric values in the column of the specified grid and assigns the summary to an action result. Note: only numeric columns will be available to be

summarized. Note also that 'RecordCount' is a specialized field that just retrieves the count of the number of records in a grid.

So Where Would We Use It?

Used in a series of actions to tally the numeric values of a column within a grid, allowing you to use the sum in subsequent actions.

Properties for Get Sum

To set the properties for this action, follow these steps:

1. Select *Get Sum* from the *Action* dropdown list.
2. Select *Grid* from the dropdown list.
3. Select *Column* from the dropdown list.
4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Refresh All Grids

Definition for Refresh All Grids

This action refreshes all grids on the screen with updated values for each row.

So Where Would We Use It?

You just finished adding some new activities and transaction details to a customer and you wish to see the information appear in the Existing Customers grid. The Refresh All Grids action will reload all grids on the screen, in this case both the Activity and Transactions, reflecting all changes.

Properties for Refresh All Grids

To set the properties for this action, follow these steps:

1. Select *Refresh All Grids* from the *Action* dropdown list.
2. Enter *Internal note* (Optional).
3. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Refresh Grid

Definition for Refresh Grid

Refresh Grid refreshes the specified grid with updated values for each row.

So Where Would We Use It?

This action is most commonly used in **Refresh** buttons. You just finished adding a new customer and you wish to see the customer appear in the Existing Customers grid. The Refresh Grid action will reload a specific grid, in this case Existing Customers, reflecting all changes.

Properties for Refresh Grid

To set the properties for this action, follow these steps:

1. Select *Refresh Grid* from the *Action* dropdown list.
2. Select a *Grid* from the dropdown list to specify which grid will be refreshed.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Save Grid Row

Definition for Save Grid Row

Save Grid Row saves all the values in the current row of the specified grid.

So Where Would We Use It?

In case you need to make an inventory adjustment; simply go to the appropriate grid, make the adjustment and update the information by clicking on the **Update** link. This action saves new info and you're all done.

Properties for Save Grid Row

To set the properties for this action, follow the example steps below:

1. Select *Save Grid Row* from the *Action* dropdown list.
2. Select *Grid* from the dropdown list.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Set View Filter

Definition for Set View Filter

This action will set the active filter view on a grid.

So Where Would We Use It?

You could use this to change a filter view on a grid, based on the active user Role/Group.

Properties for Save Grid Row

To set the properties for this action, follow these steps:

1. Select *Set View Filter* from the *Action* dropdown.
2. Select the *Grid* you want to set the filter for.
3. Select the filter *View* you want to make active.
4. Enter *Internal note* (Optional).
5. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Start Loop Through Grid

Definition for Start Loop Through Grid

All subsequent actions will be processed between "Start Loop Through Grid" and "End Loop Through Grid" for each row of the grid.

Note: This must be used in conjunction with the "End Loop Through Grid".

So Where Would We Use It?

Allows the user to select the records they wish to include in subsequent actions. All unselected records in the grid will be omitted from the action set.

Properties for Start Loop Through Grid

To set the properties for this action, follow these steps:

1. Select *Start Loop Through Grid* from the *Action* dropdown list.
2. Select *Grid/Table* from the dropdown list.
3. Check the option to *Only select rows that are checked* to include selected records; otherwise, leave unchecked to include all records in the grid.
4. Check the option *Only rows that are edited in grid* if you only want to include rows that have had changes made.
5. Click Advanced Options (Optional); otherwise, skip to Step 10.
6. Select a value from the dropdown to *Only show distinct values from field.*
7. Select *Where* condition from the dropdown.
8. Select the condition from the dropdown.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – Sets the condition to a value that results from the current session information.

9. If you selected *Type In* for Step 7, enter the predefined value and proceed to Step 10; otherwise, specify a *Value* in the dropdown list below.
10. Enter *Internal note* (Optional).
11. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

End Loop Through Grid

Definition for End Loop Through Grid

All subsequent actions will be processed between "Start Loop Through Grid" and "End Loop Through Grid" for each row of the grid.

Note: This must be used in conjunction with the "Start Loop Through Grid".

So Where Would We Use It?

Allows the user to select the records they wish to include, that are found within the loop through grid actions. All unselected records in the grid will be omitted from the action set.

Properties for End Loop Through Grid

To set the properties for this action, follow these steps:

1. Select *End Loop Through Grid* from the *Action* dropdown list.
2. Enter Internal note (Optional).
3. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Report

Generate Report

Definition for Generate Report

Silently generates a report based on specified filter criteria and saves the report on the server. All reports are built using the Method Report Designer application.

So Where Would We Use It?

A user can select the Generate Report action to create a report based on a predefined report template in Method Report Designer.

Properties for Generate Report

To set the properties for this action, follow these steps:

1. Select *Generate Report* from the *Action* dropdown list.
2. Select *Report* from the dropdown list, or click **Open Report Designer...**.
3. Select if you want to override this report with another.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify a *Value* in the dropdown list below.
5. Select *Tables of Report* from the dropdown list.
6. Select *Field in Table* from the dropdown list.
7. Select *Condition Statement* from the dropdown list.

The operator choices are:

- Contains – displays all records that contain the criterion.
- Does not contain – displays all records that do not contain the criterion.
- Less than – displays all records that are less than the criterion.
- Less than or equal to – displays all records that are less than or equal to the criterion.

- Equal to – displays all records that exactly match the criteria.
- Is not equal to – displays all records that don't match the criteria.
- Greater than – displays all records that are greater than the criterion.
- Greater than or equal to – displays all records that are greater than or equal to the criterion.
- Starts with – displays all records that begin with the criteria.
- Ends with – displays all records that end with the criteria.
- Is empty – displays all records that are null.
- Is not empty – displays all records with data.
- Build selection list – displays all records that the user selects manually.
- Within date range – displays all records that are within a user-specified date range.

8. Select *From* field from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

9. If you selected *Type In* for Step 8, enter the predefined value and proceed to Step 10; otherwise, specify *From* field from the dropdown to the right.
10. Click on **Use Advanced Script** if you would like to filter the report using scripts. Select the script (previously assigned action result) from the dropdown list; otherwise, proceed to Step 11 (if applicable). Click on **Use Regular Script** to revert.
11. Click on **and Where** if you would like to specify more conditions; otherwise, proceed to Step 17 (if applicable). Click on **remove where** to remove this condition.
12. Select *Where Field* from the dropdown list (if applicable).
13. Select *Value Is* (if applicable).

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.

14. If you Selected *Type in* for Step 13, enter the predefined value; otherwise, select *Value* from dropdown.
15. Click on **and Where** if you have even more conditions to filter by. Repeat Steps 13 through 14; otherwise, proceed to Step 16, (if applicable). Click on **remove where** to remove this condition.
16. Select *Report Type* from the dropdown, by default it is set to PDF.

The Choices are:

- PDF
- HTM
- PNG
- RTF
- XLS
- MHT
- TXT
- CSV

17. Enter *Action Result name*.
18. Check *Show In New Window* to show the report in a new web window; uncheck to show the report in the same web window.
19. Enter *Internal note* (Optional).
20. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Refresh Report

Definition for Refresh Report

This action refreshes the specified report with updated values and/or filter criteria.

So Where Would We Use It?

Simply choose to refresh the report action and it will show the reflected updates.

Properties for Refresh Report

To set the properties for this action, follow the example steps below:

1. Select *Refresh Report* from the *Action* dropdown list.
2. Select the *Report* from the dropdown list.
3. Enter Internal note (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Calendar

Convert to Series

Definition for Convert to Series

This action will convert a specified record to a Series. The record must be a OneTime for its RecurrenceType for the service to be converted. If RecurrenceInfo is not currently in the record you are converting to a series, a default Basis of Project with minimum information will be created.

So Where Would We Use It?

Imagine a prospect calls in requesting to schedule some 'emergency maintenance'. You create a work order and rush out to complete the job. The client being very impressed has now requested the same work be scheduled on a monthly basis. Simply take the work order and convert it to a 'series'.

Properties for Convert to Series

To set the properties for this action, follow these steps:

1. Select *Convert to Series* from the *Action* dropdown list.
2. Select the *table* from the dropdown.
3. Select the *Record ID* from the dropdown.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.
- Value From Row – sets the condition to a value from a specified row.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify a *Value* in the dropdown list below.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Copy Series

Definition for Copy Series

This action duplicates an existing series instead of creating it from scratch.

So Where Would We Use It?

You have a series already setup to visit your customer twice a month to cut his grass, now he wants you to also come back every 6 months to trim trees. You can copy the series and just adjust the time between visits. This will save you time from having to create a new Series from scratch.

Properties for Convert to Series

To set the properties for this action, follow these steps:

1. Select *Copy Series* from the *Action* dropdown list.
2. Select the *Table* the Series will be based off of from the dropdown.
3. Select *Copy From Series Record ID* from the dropdown.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify a *Value* in the dropdown list to the right.
5. Select *Copy To Series Record ID* from the dropdown.

The choices are:

- Type In - Sets the condition to a value that the user types in manually.
- Action Result – Sets the condition to a user-defined action result.
- Value From Screen – Sets the condition to a value pulled from a specific field within the specified screen.

6. If you selected *Type In* for Step 5, enter the predefined value and proceed to Step 7; otherwise, specify a *Value* in the dropdown list to the right.
7. Select *Copy Recurring Dates Option* from the dropdown.

The choices are:

- Insert Dates.
- Insert Dates Copy Exact Dates.
- Copy Exact Dates greater than today.
- Copy no dates.

8. Check or uncheck the *"Delete existing occurrences on insert?"* checkbox.
9. Enter *Action Result Name*.
10. Enter *Internal note* (Optional).
11. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Insert Recurrence Date

Definition for Insert Recurrence Date

This action adds an additional date to a recurring series of an appointment.

So Where Would We Use It?

Useful in scheduling ongoing or recurring appointments in the future, the Insert Recurrence Date action allows the user to insert a recurrence for scheduling.

Properties for Insert Recurrence Date

To set the properties for this action, follow these steps:

1. Select *Insert Recurrence Date* from the *Action* dropdown list.
2. Select *Table* from the dropdown list.
3. Select *Recurrence Record ID* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify *Value* from the dropdown below.
5. Select *From date / time* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.

6. If you selected *Type In* for Step 5, enter the predefined value and proceed to Step 7; otherwise, specify *Value* from the dropdown below.
7. Select *To date / time* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.

8. If you selected *Type In* for Step 7, enter the predefined value and proceed to Step 9; otherwise specify *To date / time* from the dropdown below.
9. Assign *Action Result name.*
10. Enter *Internal note* (Optional).
11. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Get Selection Info

Definition for Get Selection Info

This action gets information from the area currently selected on the calendar. This is useful if you want to create a new appointment based on the date, time and resource currently selected in the calendar.

So Where Would We Use It?

This allows a user to highlight a specific time interval in a calendar and create a new appointment, pre-populate the date, time and resource fields, based on what the user highlights.

Properties for Get Selection Info

To set the properties for this action, follow these steps:

1. Select *Get Selection Info* from the *Action* dropdown list.
2. Select *Calendar* from the dropdown list.

3. Select *source* from the dropdown list.

The choices are:

- Date – displays all records with a specified date.
- Resource – displays all records for a specified resource.
- Start Date and Time – displays all records with a specified start date and time.
- End Date and Time – displays all records with a specified end date and time.

4. Enter *Action Result name*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Refresh Calendar

Definition for Refresh Calendar

Refreshes the specified calendar with updated appointments.

So Where Would We Use It?

This is especially useful in instances where multiple users can assign activities to other users. The Refresh Calendar action will reload the specified calendar to display all updated appointments.

Properties for Refresh Calendar

To set the properties for this action, follow these steps:

1. Select *Refresh Calendar* from the *Action* dropdown list.
2. Select *Calendar* from the dropdown list.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Renew Recurrence

Definition for Renew Recurrence

This action renews a recurring appointment by adjusting the start and end date to be a year later, and regenerates the recurring dates with the new date range.

So Where Would We Use It?

Your recurring appointment is about to expire, with the use of this action you can simply renew this and have the appropriate changes made for another year.

Properties for Renew Recurrence

To set the properties for this action, follow these steps:

1. Select *Renew Occurrence* from the *Action* dropdown list.
2. Select *Table* from the dropdown list.
3. Select *Record ID* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify *Value* from the dropdown below.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Restore Occurrence

Definition for Restore Occurrence

If an appointment is an occurrence of a recurring series and is edited, it becomes a "Changed Occurrence" and no longer gets updated when values in the main series gets updated. Using the Restore Occurrence action you can reset the appointment to no longer be a Changed Occurrence.

So Where Would We Use It?

You have a recurring appointment every week to cut grass at 101 Method Ave. You open this week's occurrence and put in some notes and this changes the occurrence from a recurring series to "Changed Occurrence". This single "Changed Occurrence" will not be updated if you make edits to the series. So, you use this action to turn the "Changed Occurrence" back to a "recurring occurrence". Now when you update the series, this occurrence also gets updated.

Properties for Restore Occurrence

To set the properties for this action, follow these steps:

1. Select *Restore Occurrence* from the *Action* dropdown list.
2. Select *Table* from the dropdown list.
3. Select *Record ID* Value from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify a *Value* in the dropdown list below.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Start Loop Through Calendar

Definition for Start Loop Through Calendar

All subsequent actions will be processed between "Start Loop Through Calendar" and "End Loop Through Calendar" for each appointment in the calendar. Note: each appointment's Record ID will be temporarily loaded into "Action Result (for Record ID)" so that it is easily available for use in actions inside your loop.

Note: This must be used in conjunction with the "End Loop Through Calendar".

So Where Would We Use It?

It allows the user to specify a date range of appointments by using actions between the Start and End Loop through Calendar actions. All dates outside the specified range will be omitted from the action set.

Properties for Start Loop Through Calendar

To set the properties for this action, follow these steps:

1. Select *Start Loop Through Calendar* from the *Action* dropdown list.
2. Select *Calendar* from the dropdown list.
3. Check *Only select appointments which are checked* to include selected appointments; otherwise, leave unchecked to include all appointments.
4. Enter the name for *Action Result (for Record ID)*.
5. Enter *Internal note* (Optional).
6. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

End Loop Through Calendar

Definition for End Loop Through Calendar

All subsequent actions will be processed between "Start Loop Through Calendar" and "End Loop Through Calendar" for each appointment in the calendar.

Note: This must be used in conjunction with the "Start Loop Through Calendar".

So Where Would We Use It?

Used in conjunction with the "Start Loop Through Calendar" action, this allows the user to specify a date range of appointments that will be used in subsequent actions. All dates outside the specified range will be omitted from the action set.

Properties for End Loop Through Calendar

To set the properties for this action, follow these steps:

1. Select *End Loop Through Calendar* from the *Action* dropdown list.
2. Enter *Internal note* (Optional).
3. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Advanced

Call Another Action Set

Definition for Call Another Action Set

Allows you to call (use) an action set used elsewhere on the current screen.

So Where Would We Use It?

Useful when creating multiple action sets on a screen that has many sections, you can easily call the functionality assigned to other objects or fields that perform the same actions to save time.

Properties for Call Another Action Set

To set the properties for this action, follow these steps:

1. Select *Call Another Action Set* from the *Action* dropdown list.
2. Select *Current Action Sets* from the dropdown list.
3. Enter *Internal note* (Optional).
4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Call Web Service

Definition for Call Web Service

You may call a web service within method. Just provide the URL (i.e. https://webservice.com/web/service.asmx) and the function name being called in the web service (i.e. MyFunctionCall), and if it returns a result, the action result will hold the information. Add any parameters to the web service call in the order in which they are sent to the web service.

So Where Would We Use It?

Useful when creating enhanced functionality for complex functions, such as additional programming via the Method API.

Properties for Call Web Service

To set the properties for this action, follow these steps:

1. Select *Call Web Service* from the *Action* dropdown list.
2. Enter *URL*.
3. Enter *Function Name*.

4. Check the "Web Service returns a response?" box, only if you wish to have the web service return a processed result to Method; otherwise, leave unchecked.
5. Enter Action Result name.
6. Click **Insert Parameters**.
7. Select Number of Parameters to Pass from the dropdown.
8. Enter Parameter Name.
9. Select Parameter Value from the dropdown.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.

10. If you selected *Type In* for Step 9, enter the predefined value and proceed to Step 11; otherwise, specify *Value* in the field to the right.
11. Repeat Steps 8 – 10 for each parameter you wish to pass.
12. Enter *Internal note* (Optional).
13. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Conditional Warning

Definition for Conditional Warning

If the "Conditional Statement" is true, a warning message will be shown to the user, and all subsequent actions will not get processed. This is an excellent way to validate entries and exit processing if your requirements are not met.

So Where Would We Use It?

Useful when a required condition is not met, Conditional Warning will generate a custom pop-up message that provides details on how to solve the problem or meet the conditions.

Properties for Conditional Warning

To set the properties for this action, follow these steps:

1. Select *Conditional Warning* from the *Action* dropdown list.
2. Select *Value 1* from the dropdown list.

The choices are:

- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.

3. Specify *Value 1* in the dropdown list to the right.
4. Select condition from the dropdown list.

The operator choices are:

- Equal to – displays all records that exactly match.
- Not equal to – displays all records that don't match the criteria.
- Greater than – lists all values that are greater than the criterion.
- Greater than or equal to – lists all values that are greater than or exactly match the criterion.
- Less than – lists all values in the field that are less than the criterion.
- Less than or equal to - lists all values that are less than or exactly match the criterion.
- Contains – lists all records that contain a specified value.
- Does not contain – lists all records that do not contain the specified value.

5. Select *Value 2* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.

6. If you selected *Type In* for Step 5, enter the predefined value and proceed to Step 7; otherwise, specify the *Value* in the dropdown list to the right.
7. Enter *Warning message*.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

8. If you selected *Type In* for Step 7, enter the value and proceed to Step 9; otherwise, specify the *Value* in the dropdown list to the right.

9. Enter *Internal note* (Optional).
10. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Credit Card Processing

Definition for Credit Card Processing

Charges either a credit card or electronic check, and stores the value 'APPROVED' in the 'Action Result Success or 'Fail' if processed successfully. This can be used in a Start Condition Statement to determine what action should be taken after the credit card has been processed. 'Action Result' will contain the message returned from the credit card processing company, giving the reason why the credit card failed. 'Action Result Order ID' returns the order number from the credit card processing company. This is useful in

situations where the credit card failed and you would like to know what happened. Note: you must have an existing merchant account with one of the supported processors.

So Where Would We Use It?

Useful if you would like to process payments within Method using credit cards or electronic checks.

Properties for Credit Card Processing

To set the properties for this action, follow these steps:

Steps for Credit Card

1. Select *Credit Card Processing* from the *Action* dropdown list.
2. *Select Credit Card Company* (merchant account) from the dropdown list.
3. Enter the *Store ID*.
4. Enter the *Pass Phrase*.
5. Select the *Action Type.*

Choices are:

- Charge
- Refund
- Void

For Steps 6 – Step 18, select the *Value* from each dropdown list. Note: For steps 9 through 11, Value from Session is not present.

The choices may include:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

Note: If you select *Type In*, enter the predefined value; otherwise, specify a *Value* in the dropdown.

6. Select *Customer Company*.
7. Select *Customer Name*. (*Required).
8. Select *Address*.
9. Select *City*.
10. Select *State*.
11. Select *Zip Code*.
12. Select *Email*.
13. Select *Country*.
14. Select *Credit Card Number*.
15. Select *Expiry Month*.
16. Select *Expiry Year*.
17. Select *CVV*.

18. Select *Total*.
19. Enter name for *Action Result*.
20. Enter name for Action Result storing *Success or Fail*.
21. Enter *Action Result Order ID*.
22. Enter Action Result for Trans Ref.
23. Enter *Internal note* (Optional).
24. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Steps for Electronic Check

1. Select *Credit Card Processing* from the *Action* dropdown list.
2. *Select Electronic Check Company* (merchant account) from the dropdown list.
3. Enter the *Username.*
4. Enter the *Password.*
5. Select the *Action Type.*

Choices are:

- Charge
- Refund
- Void

For Steps 6 – Step 18, Select the *Value* from each dropdown list. Note: For steps 9 through 11, Value from Session is not present.

The choices may include:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

Note: If you select *Type In*, enter the predefined value otherwise; specify a *Value* in the dropdown.

6. Select *Customer Company*.
7. Select *Customer Name*. (*Required).
8. Select *Address*.
9. Select *City*.
10. Select *State*.
11. Select *Zip Code*.
12. Select *Email*.
13. Select *Country*.
14. Select *Account Number.*
15. Select *Routing Number.*
16. Select *Check Type.*
17. Select *Product ID*.
18. Select *Total*.
19. Enter name for *Action Result*.
20. Enter name for Action Result storing *Success or Fail*.

21. Enter *Action Result Order ID*.
22. Enter *Action Result Trans Ref Number*.
23. Enter *Internal note* (Optional).
24. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Create Third Party Portal Link

Definition for Create Third Party Portal Link

Provides you with an Action Result that contains the URL of a unique link you can provide to your customers, vendors or partners to log into their portal without a User Name or Password. You can also specify that they get directed to a specific Tab Link. For advanced users, you can even create a Shared Result, such as the Record ID of an invoice, which can be later retrieved in the screen's load action (using Get Value From Shared result) and used to filter the screen.

So Where Would We Use It?

Used in the Customize tab to create third party portals. A third party portal allows third parties to view information related to their account, records, or whatever information you decide to make available to them.

Properties for Create Third Party Portal Link

To set the properties for this action, follow these steps:

1. Select *Create Third Party Portal Link* from the *Action* dropdown list.
2. Select *Third Party Portal* from the dropdown list.
3. Select *Portal User's Record ID* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

4. If you selected *Type In* for Step 3, enter the predefined value and proceed to Step 5; otherwise, specify the *Value* in the dropdown list to the right.
5. Select *Tab Link to open* from the dropdown list.
6. Select *Link expiry date* (Optional) from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

7. If you selected *Type In* for Step 6, enter the predefined value and proceed to Step 8; otherwise, specify *Value* in the dropdown list to the right.
8. Enter *Create a Shared Result* (Optional).
9. If you opted to create a shared result, select *Shared Result value* from the dropdown list; otherwise, proceed to Step 12.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

10. If you selected *Type In* for Step 9, enter the predefined value and proceed to Step 11; otherwise, specify *Shared Result value* in the dropdown list to the right.
11. Enter Action Result name (Link's URL)
12. Enter *Internal note* (Optional).
13. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Send Email

Definition for Send Email

This action sends an email to the specified recipient.

Notes: (1) the "Body" commonly uses an HtmlEditor object, (2) Priority accepts the values "High", "Normal" and "Low", (3) Server Address, User Name and Password are the SMTP settings of your company's e-mail server. If you have already entered in your SMTP settings, leave these fields blank.

So Where Would We Use It?

Useful to send emails directly from method and avoid the need to move away to another app which can be another distraction you don't need.

Properties for Send Email

To set the properties for this action, follow these steps:

1. Select *Send Email* from the *Action* dropdown list.

For Step 2 – Step 13 below, select the *Value* from each dropdown list.
Note: For steps 7 through 13, Value from Session is not present

The choices for each may include:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row.
- Value From Calendar – sets the value from a specified calendar.

Note: If you selected *Type In*, enter the predefined value; otherwise, specify a *Value* in the dropdown.

2. Enter email *Subject*. (Optional).
3. In *Email To:* enter email address of the recipient. (*Required).
4. In *Email Cc:* add recipient email address. (Optional).
5. In *Email Bcc:* add recipient email address. (Optional).
6. In *Email From:* enter email address of sender. (*Required).
7. Enter *Email From Name:* as to appear on sent items. (Optional).
8. Enter email contents in B*ody*.
9. Determine *Priority* of the email. (Optional).
10. Determine *Attachment Location* for any files. (If applicable).
11. Enter *Server Address*. (SMTP settings from email server).
12. Enter *User Name*. (SMTP settings from email server).
13. Enter *Password*. (SMTP settings from email server).
14. Enter *Internal note.* (Optional).
15. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Start Conditional Statement

Definition for Start Conditional Statement

If the "Start Conditional Statement" is true, all subsequent actions will be processed until the "End Conditional Statement" action is reached.

Note: This must be used in conjunction with the "End Conditional Statement".

So Where Would We Use It?

Conditional statements set up a series of rules for which subsequent actions are to be carried out only when the conditions of the rules are met.

Properties for Start Conditional Statement

To set the properties for this action, follow these steps:

1. Select *Start Conditional Statement* from the *Action* dropdown list.
2. Select *Value 1* from the dropdown list.

The choices are:

- Action Result – sets the condition to a user-defined action result.

- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row

3. Specify *Value 1* in the dropdown list to the right.
4. Select condition from the dropdown list.

The operator choices are:

- Equal to – displays all records that exactly match.
- Not equal to – displays all records that don't match the criteria.
- Greater than – lists all values that are greater than the criterion.
- Greater than or equal to – lists all values that are greater than or exactly match the criterion.
- Less than – lists all values in the field that are less than the criterion.
- Less than or equal to - lists all values that are less than or exactly match the criterion.
- Contains – displays all records that contain the criterion.
- Does not contain – displays all records that do not contain the criterion.
- Build Selection List – lists all values from the user-defined list.

5. Select *Value 2* from the dropdown list.

The choices are:

- Type In – sets the condition to a value that the user types in manually.
- Action Result – sets the condition to a user-defined action result.
- Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
- Value From Session – sets the condition to a value that results from the current session information.
- Value From Row – sets the condition to a value from a specified row

6. If you selected *Type In* for Step 5, enter the predefined value and proceed to Step 7; otherwise, specify *Value 2* in the dropdown list to the right.
7. Enter *Internal note* (Optional).
8. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

End Conditional Statement

Definition for End Conditional Statement

If the "Start Conditional Statement" is true, all subsequent actions will be processed until the "End Conditional Statement" action is reached.

Note: This must be used in conjunction with the "Start Conditional Statement".

So Where Would We Use It??

You can use this action to specify an end within the action set to any actions that should be contained and only applied within the condition statement.

Properties for End Conditional Statement

To set the properties for this action, follow these steps:

1. Select *End Conditional Statement* from the *Action* dropdown list.
2. Enter *Internal note* (Optional).
3. Click **Save & Close** to save changes and close the action properties window, otherwise click **Cancel** to close the window without saving.

Stop Processing More Actions

Definition for Stop Processing More Actions

This action skips processing all remaining actions. This is often used when a "Start Conditional Statement" gives an undesired result.

So Where Would We Use It?

Useful when a required condition is not met, Stop Processing More Actions will cancel the action set from that point forward. Once conditions are met, Stop Processing More Actions will no longer prevent the action set from going forward and the subsequent actions are performed.

Properties for Stop Processing More Actions

To set the properties for this action, follow these steps:

1. Select *Stop Processing More Actions* from the *Action* dropdown list.
2. Enter *Internal note* (Optional).
3. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.

Spell Checker

Definition for Spell Checker

This action checks the spelling of the specified object. This spell checking action cannot be assigned to an HTML editor. Instead, you can just click on the spell check 'ABC' icon directly in the HTML editor.

So Where Would We Use It?

This action is commonly used to check the spelling in any text boxes before moving forward.

Properties for Spell Checker

To set the properties for this action, follow these steps:

1. Select *Spell Checker* from the *Action* dropdown list.
2. Select the field or object from the *Control* dropdown list.
3. Enter *Internal note* (Optional).

4. Click **Save & Close** to save changes and close the action properties window; otherwise, click **Cancel** to close the window without saving.