

ListMax

Getting Started With ListMax

Requirements:

- Act! v21 (and higher)
- Act! Plugin (must be installed to each PC separately)

1. Since ListMax is an Act! Plugin, Act! needs to be closed during the installation of the application. To obtain the installation file, visit: https://act4work.com/files/ListMax/ListMax_Installer.exe
2. After installation of ListMax, re-open Act!. ListMax will replace the List View that comes standard with the database.
3. If ListMax doesn't appear, go to Tools, choose Manage Add-ons. The name of the file is 'Keystroke.ListMax.ActPlugin'. This must be enabled.
4. Once successfully installed, there will be a Menu item found under Tools and ListMax. This is where you can check for updates and show the About page.

Note: ListMax will work with multiple databases but settings/filters are not universal. When switching to a new database that ListMax has not been configured for, the first pop up that appears will be the 'Column Selector'. See [below](#) for more information on this.

Opening the Contact List and the List View, you can access ListMax by clicking on this button.

What are the buttons within ListMax and how are they used? Below will highlight them and give a brief explanation.

Filters:

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Filters are used to save a previous lookup so they do not have to be performed again. For example ID/Status = Customer AND Record Manager = Chris Huffman.

The drop down list will display all previously saved Filters. If no filters are saved, it will read 'None'. This is also how to remove all filters from a lookup. Two save buttons are provided. Save and Save As.

Note: When switching through saved Filters, the column headers will remain the same for all Filters.

Show/Hide:

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

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

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

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

Lookups:

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Clear Filter - Clears all filters applied

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

Select All - Highlights all records in the display

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

Columns:

Clicking on the Columns button, the image above will appear. This allows customization of which field headers are displayed. When toggling through different saved Filters, these column headers will not change.

Create Group:

Based off the filters applied and records displayed, creates a new Act! Group. Choose between all contacts or selected (highlighted) contacts. View the newly created Group by opening the Act! Groups along the left panel (or clicking Lookup, Groups and All Groups).

Export:

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Take the current list of contacts and Exports them into a custom file type. Image above shows all available types.

Attached files:

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