Navigation Bar
for Companies-Groups

v.4.0

for ACT! 2005

Another efficient and affordable ACT! Add-On by

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Purpose of the add-on

This add-on allows you to add a navigation bar similar to the one in the *Contact Detail* view to the *Company* and *Group Detail* views.
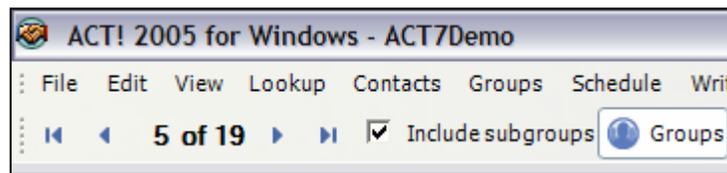
Installation procedure

Download the program file from our download page and double-click it to start the installation.

Note that contrarily to versions supporting previous ACT! versions and because of the changes in ACT!, add-ons are now DLL files and not executable files. This means that they are automatically initialized by ACT! when placed in ACT! plugin folder (a subfolder of the main ACT! directory) and cannot be started from the Windows Start menu anymore. This is why you are not given a choice of installation directory during the installation process.

The add-on automatically installs the navigation bar in the company and group detail screens. To access the add-on interface which consists of the Options window, look for the "Navigation Bar for Companies-Groups" under the *Tools* menu.

How it works

The *Navigation Bar* is automatically added to your *Company Detail* and *Group Detail* toolbars after installation. It is similar to the navigation bar of the *Contact Detail* screen.

An additional button is added to the toolbar. It allows you to include subgroups (*Group Detail* screen) or divisions (*Company Detail* screen). It has the same functionality than the checkbox in the *Group* or *Company List* screens.

With *Navigation Bar for Companies-Groups*, your *Company* and *Group Detail* and *List* screens are synchronized. If you create a lookup in a *List* screen and switch to the *Detail* screen, the same records are displayed. If you include subgroups or divisions in one of the screen, they are automatically included in the other screen.

Navigation Bar for Companies-Groups includes another feature (which can be turned off – see *Options* screen below): if you are in a *Detail* screen and create a lookup, the result of the lookup will be displayed in the *Detail* screen (ACT! automatically displays the results in *List* view if they include more than one record).

The Options screen

To access the *Options* screen, go to the *Tools* menu and choose *Navigation bar for Companies-Groups*.
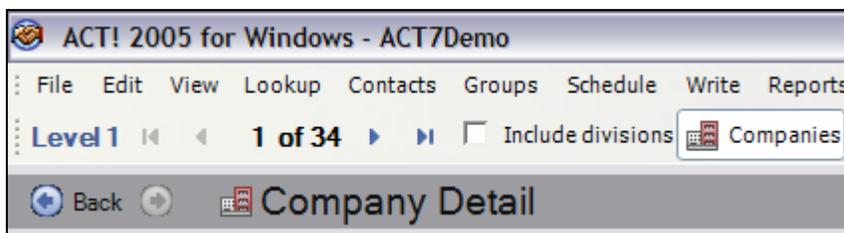

Enable Navigation Bar for Companies-Groups

This option is checked by default. If you uncheck it, the next time you start ACT!, the company and group navigation bars will not appear.

Show Hierarchy Level indicator

The *Hierarchy level indicator* is inserted at the left of the bar and displays the hierarchy level of the current record. For instance, if the current record is a top-level group, it will display *Level 1*. If it is the sub-group of this same group, it will display *Level 2*, etc.

Display in Detail view lookups initiated from Detail view

As explained before, *Navigation Bar for Companies-Groups* includes another feature: if you are in a *Detail* screen and create a lookup, the result of the lookup will be displayed in the *Detail* screen (ACT! automatically displays the results in *List* view if they include more than one record). By default, this option is checked but if you uncheck it, ACT! normal behavior will be restored.

Registering your product

To continue using this product passed the trial period, please buy a license at www.exponenciel.com. Licenses are issued for one ACT! username and will only work for that username.

Once you get a license code, right-click one of the controls of the pack in your layout and select *About.*. Once the *About* screen is open, type the registration code in the appropriate box and click OK. You might need to close and restart ACT! to complete the registration process.

Uninstalling the product

To uninstall the product, first turn off the *Navigation Bar* as explained above under *Enable Navigation Bar for Companies-Groups*. Then re-start ACT!, go to the Company Detail screen and Group Detail screen to make sure the Bar is unloaded. Then close ACT! and uninstall through the *Add/Remove programs* module of Windows Control Panel.

Support

For support, contact support@exponenciel.com.

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