1-to-1 Contact Link

Another efficient and affordable ACT! Add-On by

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Purpose of the add-on

1-to-1 Contact Link is an ACT! add-on that allows linking a contact to another contact so that, by clicking a button on your layout, you may quickly go to the linked contact without having to go through the usual lookup procedure.

How it works

You need 2 fields to create a 1-to-1 link:
- o a field which will store the name of the Linked Contact Nameand will be referred to as the *Linked Contact Name* field in this manual.
- o a field which will serve as a button and will be referred to as the *Button* field.

Example of a Spouse link

Here is an example of how the link will look: we created a field named *Spouse* and a field named *GoToSpouse*. We formatted the *GoToSpouse* field so that it looks like a button.

Button field

Linked Contact Name field
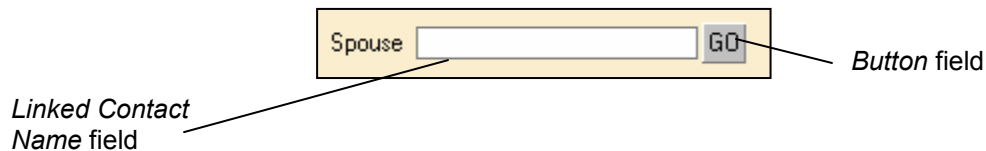
When we enter the Spouse field, the following window appears.

1-way link button   2-way link button

Through a lookup or using the navigation arrows, we just have to go to the contact we want to link with, in this case, the contact's spouse. When we have made her/him the active contact, we may either click the 1-way button or the 2-way button. The 2-way button will create a bidirectional link, i.e. a reverse link will be created in both contacts. This would be the button to click for the "spouse" example.

From now on, clicking the GO button of either contact will automatically take us to the other contact.

To edit the link, we simply enter the *Spouse* field and the same *Spouse* window will appear allowing us to link to a different contact.

You may create as many links as you want and they don't have to be bi-directional. You may want to create links to link a contact to her/his accountant, lawyer, architect, etc.

Steps to create a link

After you installed the program, here are the steps to create a link.

**NOTE:** you need to be a database administrator to create a link.

Step 1: create or modify 2 fields
You may decide to create new fields or use existing fields. It does not matter. This is done from the ACT! *Define fields* window (*Edit | Define fields*). Here are the requirements for these fields.

|	*Linked Contact Name* **field**	*Button* **field**
Type	Character	Character
# of characters	50 (or as you see fit)	22
Default value	Leave blank	GO (or whatever you want but no more than 10 characters)
Entry rules	None	None
Drop-down tab	All checked box unchecked	All checked box unchecked

Step 2: modify your layout
Now you may want to modify your layout so that the *Button* field look like a real button:
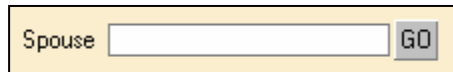
See our online demos under *Help|Online help* for more details on how to achieve the look of a button for the *Button Field*.

Don't forget to remove the tab order on the 2 fields, ie. click the number at the right of the fields. The number will disappear which means the fields will not be in the tab order anymore.
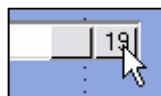
Step 3: copy the caption of the button to all contacts
Copy your *Button* field default value (GO or whatever you chose) in the *Button* field for all the contacts. To do this, go to ACT! *Edit* menu, choose *Replace* and type the default value in the *Button* field. Then go to the *Replace* menu and choose *Apply*. When prompted, choose to modify *All contacts*.

From now on, the caption will show in all contacts and new contacts will automatically inherit it since it is the default value of the *Button* Field.

Step 4: find out the *Button* field internal ID number

Each field is identified by ACT! by its internal numeric ID. To know what the ID of your *Button* field is, run
the *actdiag.exe* program located in the ACT! folder by double-clicking it in Windows Explorer, then go to
the *Reports* menu and choose *Database Fields Report*. You will be prompted to choose a database and
log into it, then asked if you want the report to be displayed in Notepad. Say yes and you'll get a report
like this:

> Database: C:\ My Documents\ACT\Database\ACT6demo.dbf
> Record Count: 63
> Field Count: 86
> Table Name: CONTACT
>
> ...
> Company   25
> Contact   26
> Address 1   27
> Address 2   28
> Address 3   29
> City   30
> State   31
> Zip   32
> Country   33
> ID/Status   34
> Phone   35
> User 1   51
> User 3   52
> ...

The field ID is shown next to the field name. If you don't remember the field name of your *Button* field,
place your cursor in it and then go to the *Edit|Define Fields* window. The name of the field will be
automatically selected in the left column.

Step 5: add the necessary triggers

Button field trigger:
- o   go to the *Edit|Define fields* window
- o   Select the Button Field name in the list on the left, go under the *Triggers* tab.
- o   Click in the *Launch when entering field* box
- o   Press the … button that appears to the right of the box and go to the add-on folder (by default this
      would be C:\Program Files\Exponenciel*1-to-1 Contact Link*)
- o   Select the *GoToContact.exe* file and click Open.

Linked Contact Name trigger:
- o   Now, while you are still in the *Edit|Define fields* window, select the *Linked Contact Name* field in
      the list on the left
- o   Click in the *Launch when entering field* box under the *Triggers* tab
- o   Press the … button
- o   In the same folder as before, select *1-to-1Contact Link.exe* and click open.

o   The path of the file appears now in the *Launch when entering field* box. To the end of this path, insert a space then a forward slash and the field ID of the button field.
The path should look like this:
C:\Program Files\Exponenciel\1-to-1 Contact Link\1-to-1Contact Link.exe /51

Editing a link

To edit a link, simply enter the *Linked Contact Name field* and the *1-to-1 Contact Link* window will appear. Then create a new link as described in *How it works* above.

Deleting a link

To delete a link, enter the *Linked Contact Name* field and the *1-to-1 Contact Link* window will appear. Do a right-click in this window and select *Delete the current link* in the popup menu.

Deleting multiple links at a time

To delete multiple links at a time, create a lookup of the contacts you want to delete the link for. Then go to ACT! *Edit* menu and select *Replace*. Type <<BLANK>> (CTRL+F5 shortcut) in the *Linked Contact Name* field. Type the caption of the button in the *Button* field. Then go to the *Replace* menu and choose *Apply*. When prompted, choose to modify the *Current lookup*.

Preferences

Changing the name of the *1-to-1 Contact Link window*

Particularly if you set up more than one link, you might want to customize the name that appears at the top of the *1-to-1 Contact Link* window to remember the link that you are currently updating, as shown below.

Customized window name
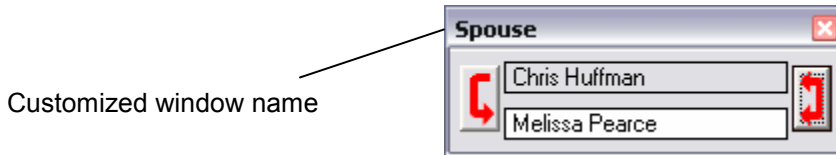
To do this, go to the *Preferences* window (do a right-click in the *1-to-1 Contact Link* window and select *Preferences* from the popup menu) and type a new name in the *Rename* the window field.
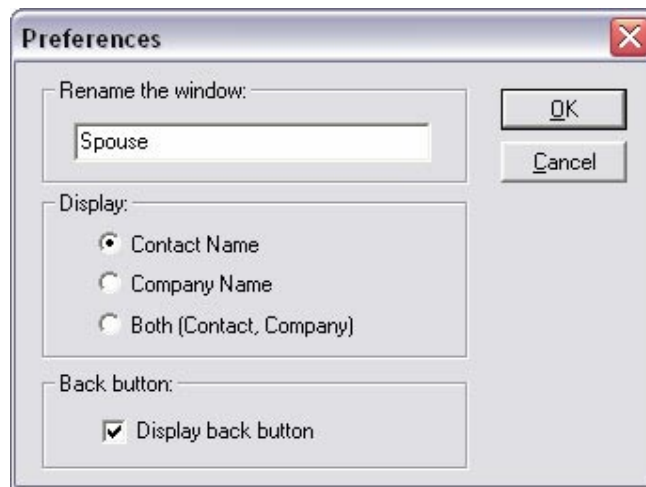
Displaying the company name or both the contact and company names

By default, *1-to-1 Contact Link* copies the contact's name to the *Linked Contact Name* field. If you would rather copy the company name or the contact's name followed by the company name, go to the *Preferences* window and select the appropriate option.

NOTE: Changing the *Display* preferences will not affect links that have already been created: it only affects future links.

Displaying a back button

You also have the option to have *1-to-1 Contact Link* display a *Back* button after the program takes you to a linked contact, so that you may quickly go back to the contact of origin.
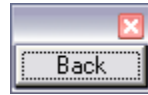

This *Back* button is a small always-on-top floating window which position is saved every time you click it. So you may position it wherever you want in your workplace.
To display a back button, check the *Display back button* in the *Preferences* window (see ablove).

Animated tutorials – Online help

The *Help* menu gives you access to our *Online Help* where you will find a number of animated tutorials.
To access the *Help* menu, do a right-click on the *1-to-1 Contact Link* window.
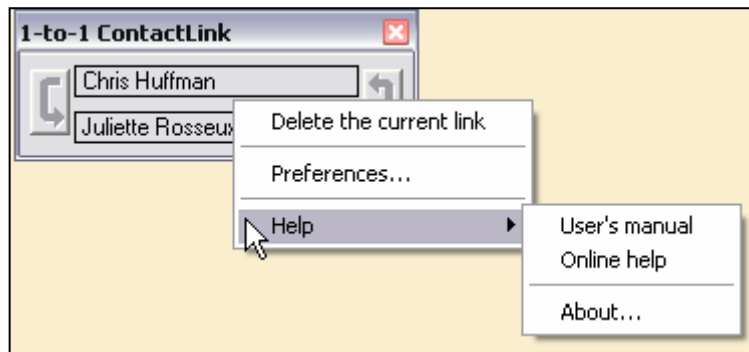
Registering *1-to-1 Contact Link*

You may buy licenses from Exponenciel. Registration is based on ACT! user names, so you will have to supply your ACT! username when registering. Once given a registration code, go to the *Help | About* menu and type the registration code in the box below your username.

Support

For support, please contact support@exponenciel.com.

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