

LayoutSwitch

v.1.1

Another efficient and affordable ACT! Add-On by



<http://www.exponencial.com>

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Purpose of the add-on:

LayoutSwitch allows to associate a layout with a type of contact or group, so that this layout is automatically selected when the contact is displayed.

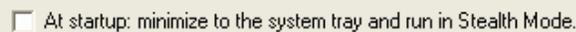
How it works

Once your database is open, run LayoutSwitch: you may run it manually but more likely you will want to run it in Stealth mode.

Stealth mode

When running in Stealth mode, LayoutSwitch is minimized to the system tray and automatically detects when a new contact or group is displayed. It then checks which layout should be displayed and automatically changes your layout if needed.

To automatically start the program in Stealth mode, check the "At startup: minimize to the system tray and run in Stealth Mode" checkbox at the bottom of LayoutSwitch main window.



At startup: minimize to the system tray and run in Stealth Mode.

When in Stealth Mode, the LayoutSwitch icon is displayed in the system tray. Simply click this icon to bring up the program main window.



You may also start the program manually and click on the Stealth Mode button.

Installation procedure

Download the program file from our [download page](#) and double-click it to start the installation.

An icon should have been added to your Contact toolbar to launch LayoutSwitch directly from within ACT!. If the icon installation failed, you will have to instruct LayoutSwitch to create it. Here is how to proceed:

Run ACT! and open your database. Then click the Windows Start button, go under Programs, locate the Exponencial ACT! Add-Ons group and click LayoutSwitch.

The main window will be displayed. Go to the Options | Integrate with ACT! menu and add icons or menu items to your ACT! screens as needed. This way, you will be able to quickly launch the program from within ACT!. When prompted, accept that ACT! be re-started.

When ACT! re-starts, whatever icons or menu items you asked to be created will be there to launch LayoutSwitch.

Automatically starting LayoutSwitch with ACT! (new in v. 1.1)

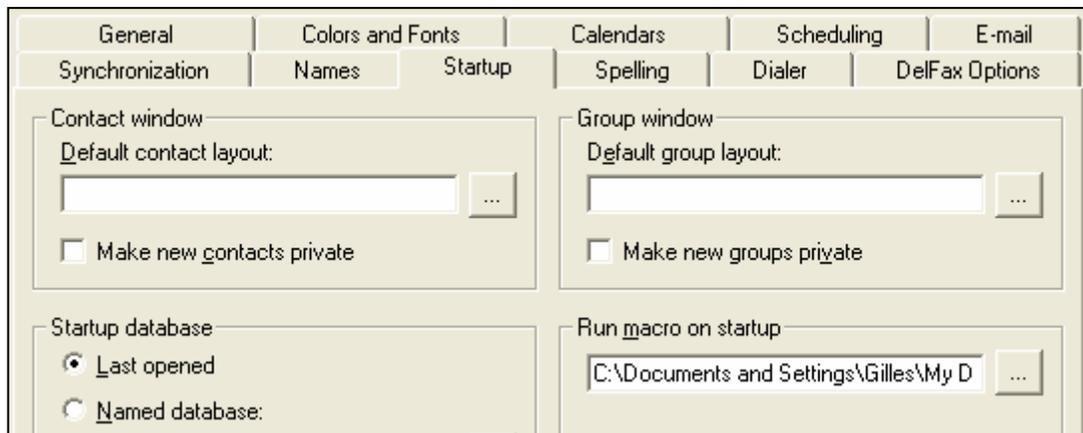
If you want LayoutSwitch to start automatically with ACT!, go to the Options/Settings menu. At the bottom of the window, you'll see the following frame:



Click the Install macro button to make the LayoutSwitch.mpr macro your startup macro.

Note that any previous macro used as startup will be wiped out. You may only have 1 startup macro.

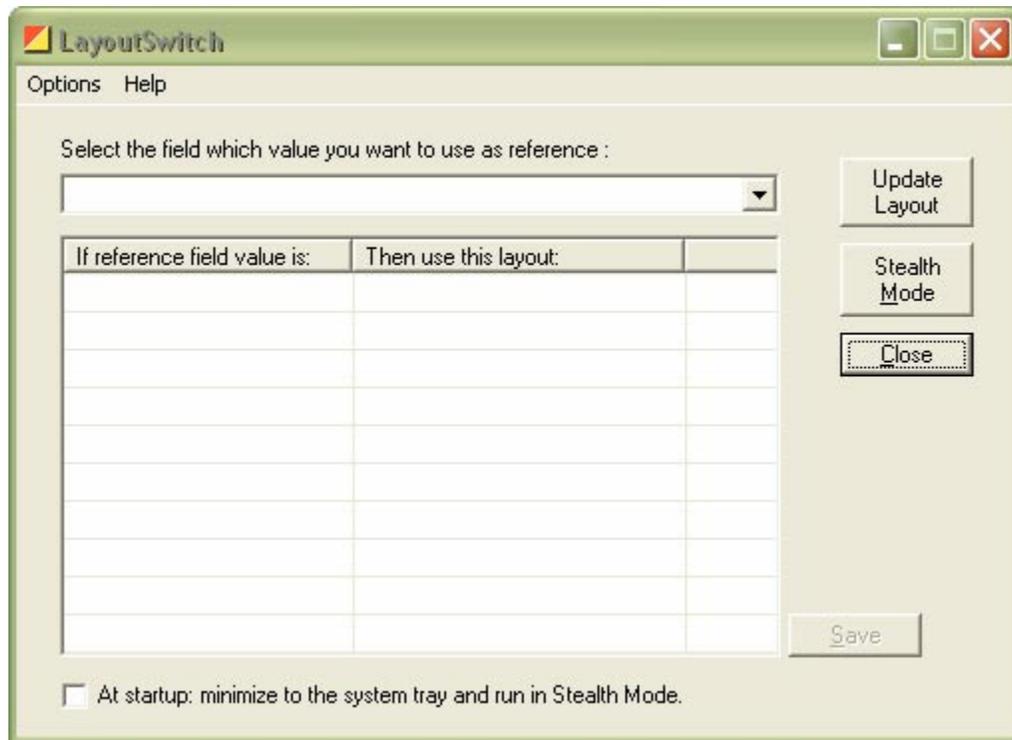
If you need to uninstall that macro, go to ACT! Edit/Preferences menu, under the Startup tab and simply clear the Run macro on startup field.



Configuring LayoutSwitch

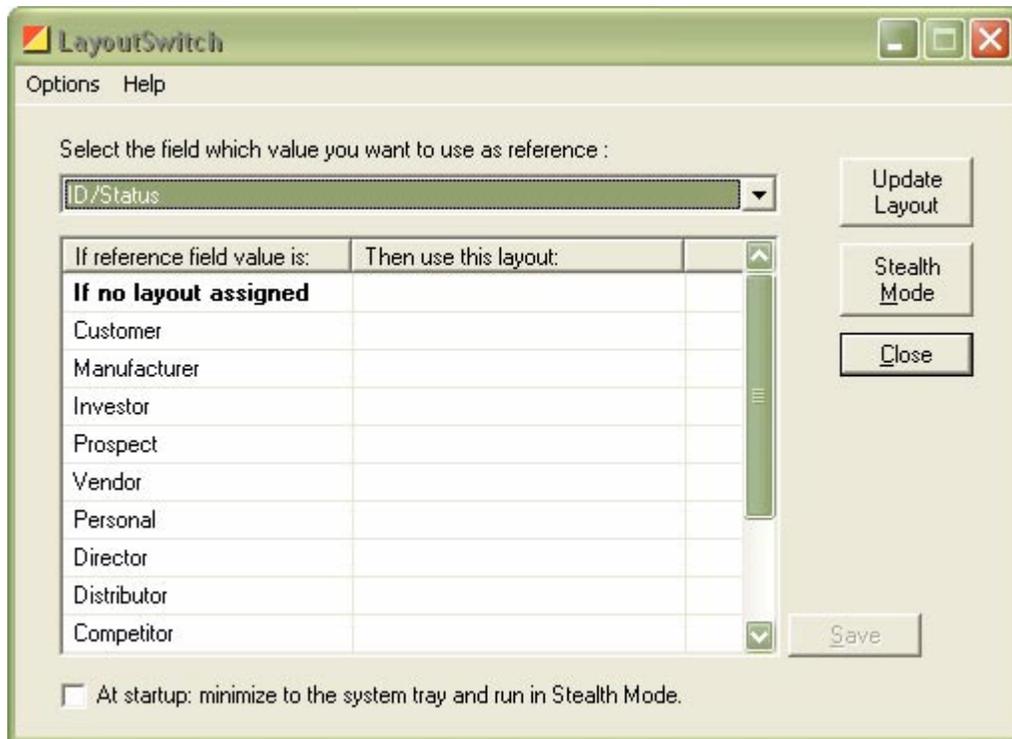
LayoutSwitch may be used with contact layouts or group layouts. We will detail here the setup for contact layouts but the procedure is the same for groups. The only difference is that you will need to run LayoutSwitch from the group screen to be able to set it up with group layouts (if you are going to use both, you will need to repeat the operation in both screens).

To setup LayoutSwitch, launch the program. Here is the main screen:

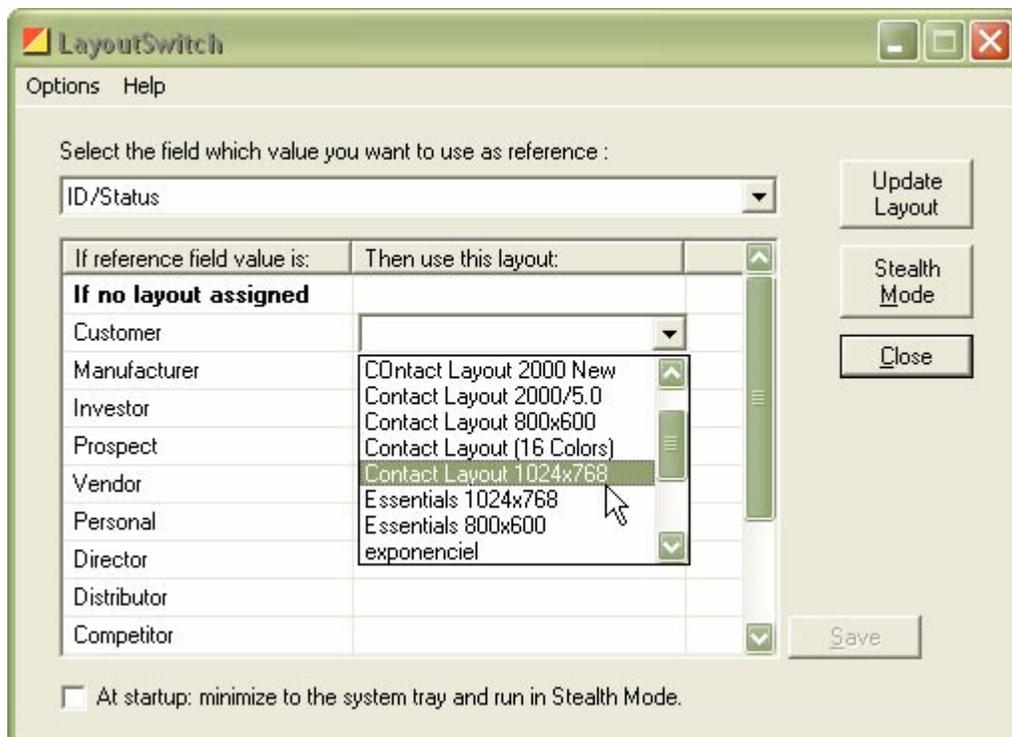


Click on the dropdown arrow to display a list of the fields that may be used as reference. Only character fields with a dropdown lists are displayed.

Select the field you want to use as reference. Typically it would be ID/Status. Once selected, the different values from the dropdown list are displayed in the table below the field.



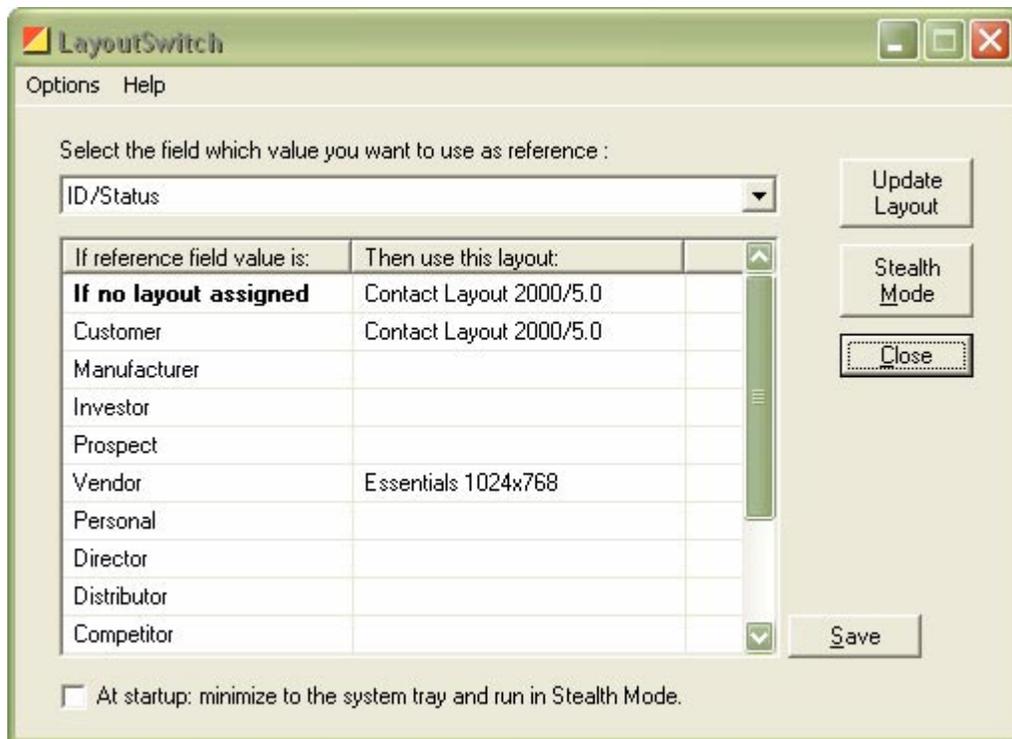
When you click in the right column, a dropdown list will the layouts appears. Select the layout you want associated with the field value.



Repeat for each value.

You may choose to not associate a value with a layout but then it is recommended to associate a layout with this "If no layout assigned" value. If no layout is associated with the value "Investor" for instance and the current contact is an investor, LayoutSwitch will use the layout associated with "If no layout assigned". If none is associated with "If no layout assigned", LayoutSwitch will keep the current layout which can be anything depending on the previous contact displayed! That's why it is recommended although not mandatory to either associate a layout with each value and/or associate a layout with this catch-all value.

For instance, the screenshot below shows a simple setup where all contacts would be displayed with the "Contact Layout 2000/5.0" layout except the contacts for which the ID/Status field is set at Vendor. In this case the "Essentials 1024X768" layout would be used.



When done, click the Save button to save your settings.

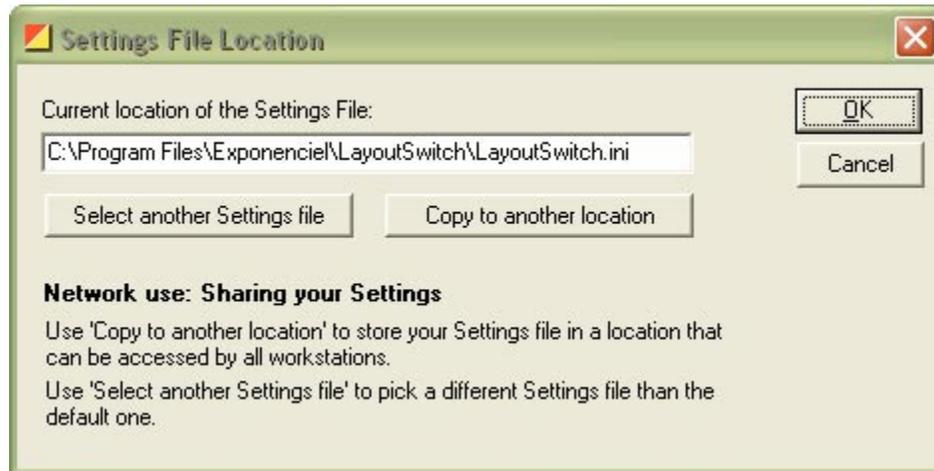
Manually updating a layout

We already saw that we have two ways of running LayoutSwitch. In Stealth mode the program is running in the background with an icon in the system tray.

If you would rather run the program manually, clicking the "Update layout" button would evaluate the value of the current contact's reference field.

Using LayoutSwitch on a network

Your settings are saved in an ini file which can be shared over a network. The Options | Settings File location window allows to save your Settings file in a network location accessible by all or to select a file already created and accessible over your network.



Adding an icon or a menu item to ACT! to launch LayoutSwitch

As with any of our add-ons, go to the Options | Integrate with ACT! menu to display this window and add icons or menu items as needed. Menu items are added to the Tools menu.



Support

For support, please contact support@exponencial.com.