

ContactLinks

v.5.3

for ACT! 2006

Another efficient and affordable ACT! Add-On by

e^xponencial

<http://www.exponencial.com>

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Purpose of the add-on

ContactLinks allows to link contacts together so that you can get to the linked contact(s) easily by simply clicking a button on your layout.

How it works

The program allows to add a tool called ContactLinksButton to your layout designer toolbar so that you can place one or more ContactLinks button anywhere you want in your layouts. Each button can have its own set of linked contacts.

Note: ContactLinks does not work with companies nor groups.

Installation procedure

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

The installation process installs a ContactLinks button on your ACT! toolbar. This button allows you to register the product but the real interface of the add-on is the button which you can add to your layouts (see below)

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.

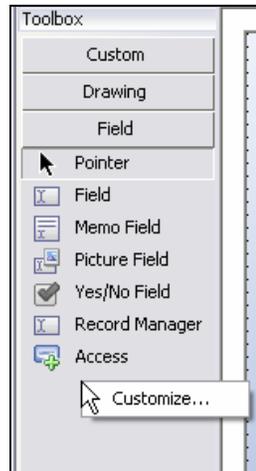
Upgrade from previous version

If you are upgrading from a version that supported ACT! 5.0, 2000 or 6.0, 2004, you will see numerous improvements.

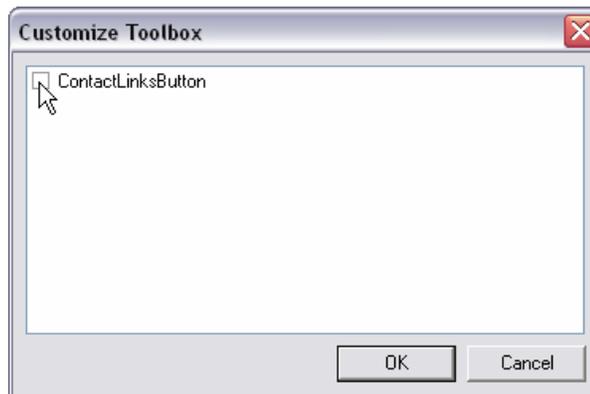
First you won't have to create a field to simulate a button in your layout. Then you won't have to create entry and exit triggers. Also the product now allows to create a one-to-many relationships and not only a one-to-one relationship as before. Consequently you now have the option to name your relationships.

The first step: adding the ContactLinksButton tool to your Layout Designer toolbar

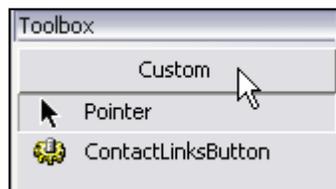
To open the Layout designer, go to ACT! tools menu and select *Design Layouts > Contact*. Then right-click on the *Toolbox*.



In the Customize Toolbox window, check ContactLinksButton.



If you now click on the *Custom* button at the top of the toolbar, you'll see that a new tool has been added.



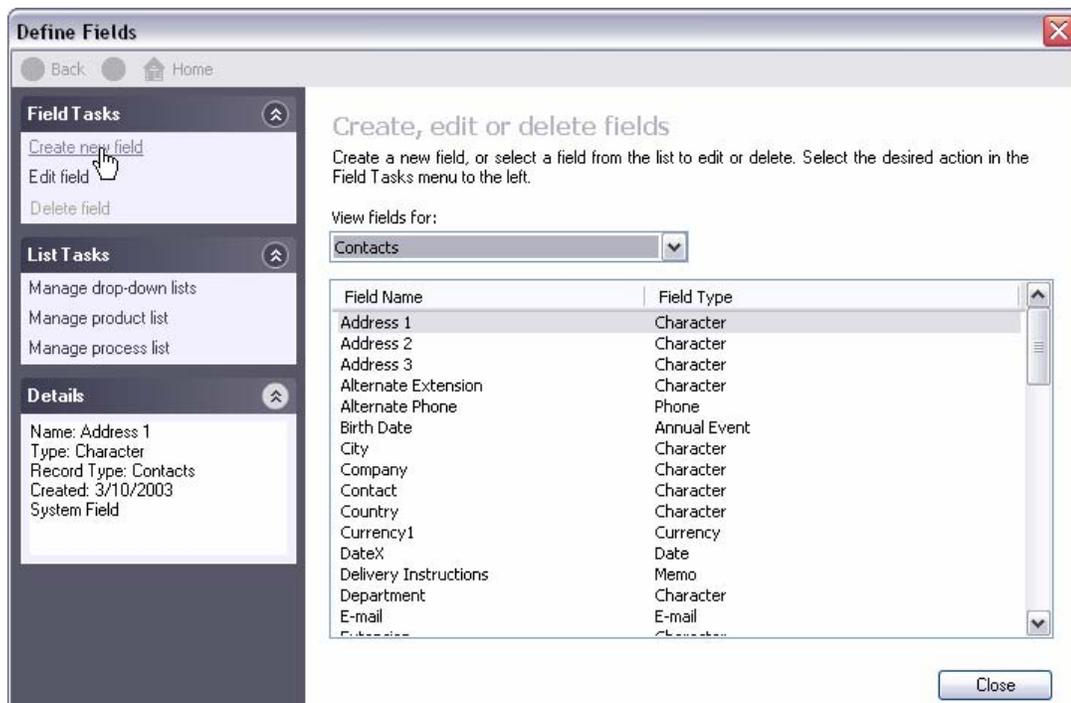
You may now close the Layout Designer window.

The second step: choosing or adding a memo field

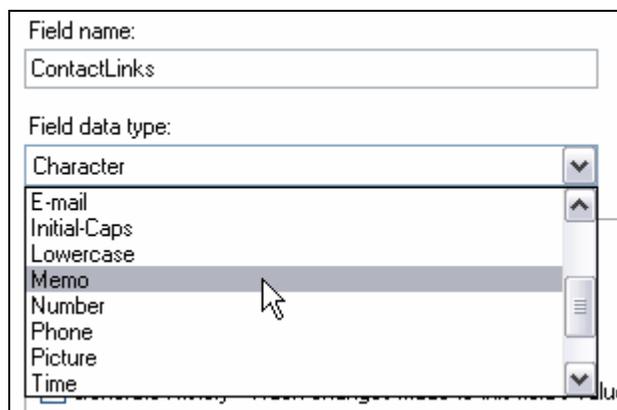
Each ContactLinks button is linked to a memo field of your ACT! database. That's where it stores the information about the linked contacts of each contact.

By default an ACT! database contains two memo fields named Delivery instructions and Memo. If you don't use one of them, you could use it for your ContactLinks button. Or you could create a new memo field: it's really easy.

Go to ACT! *Tools* menu and choose *Define fields*. Click on *Create new field* on the left:



In the next window, give your field a name and choose *Memo* in the *Field data type* drop-down list:



Then click the *Finish* button. If you wish to have more than one ContactLinks button, then create as many memo fields as needed.

The third step: adding the ContactLinks button to your layout

To add a ContactLinks button to your layout, open the Layout Designer again: *Tools > Design Layouts > Contact*.

Then use the same procedure as for adding a field but select the *ContactLinksButton* tool added previously to your toolbar: click the *Custom* button at the top of your toolbar. Click the *ContactLinkButtons* tool, then click where you want it inserted in your layout and drag to expand the selection then release. When you release the mouse button, the following window will appear.



This screen allows to associate a memo field to your button. Select the field you want, uncheck *Include a label* and click *Add*.

Your button is now inserted in the layout.



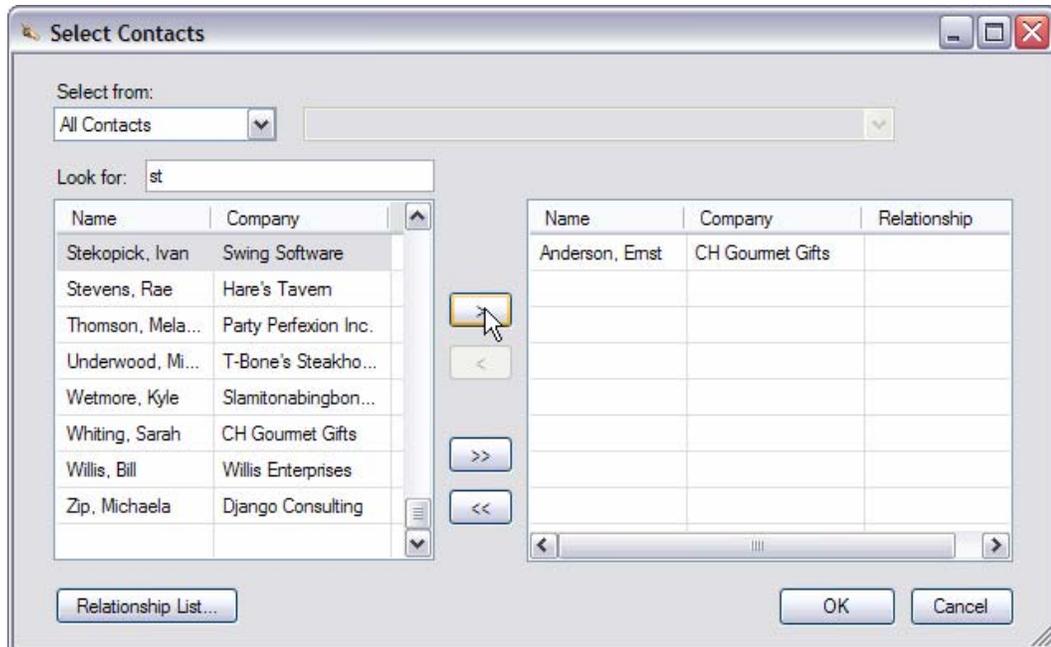
You may resize the control as you wish and move it to any place you want in your layout. Now let's close the Layout Designer.

Adding linked contacts

In your layout, you now have a *Go* button, a *Browse* button (...) and a *Back* button which is disabled.

Go to the contact you wish to link contacts to. Then click the *Browse* button. It opens the *Select Contacts* window.

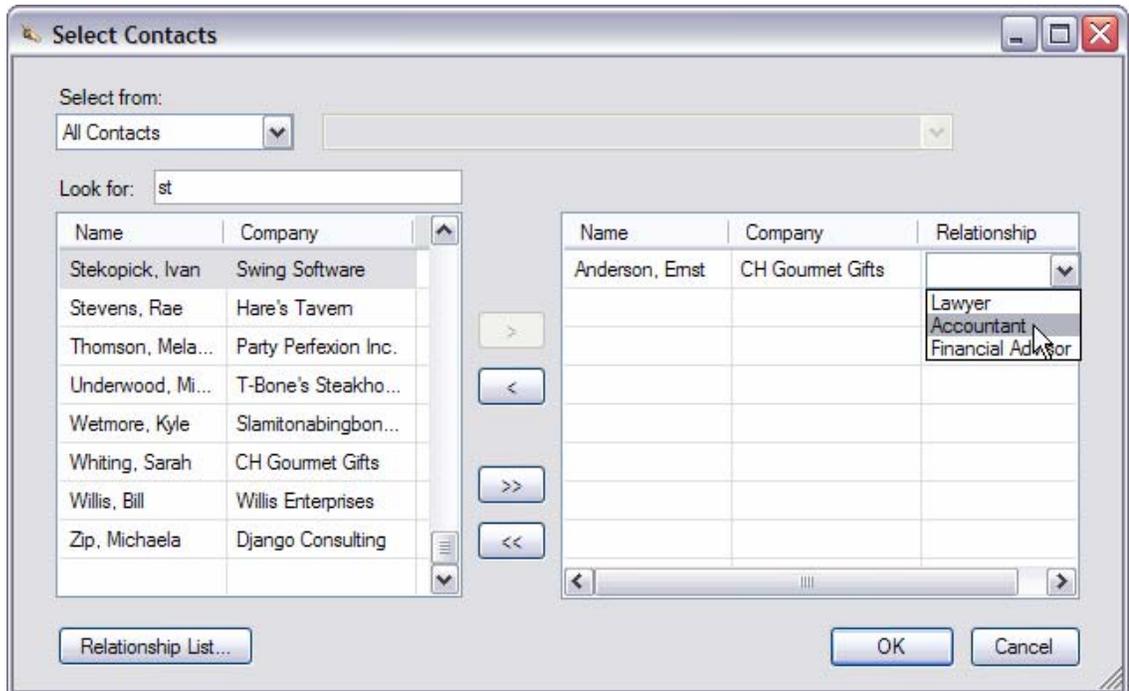
Choose an entry in the *Select from* drop-down to display either all contacts or contacts from a group of company. Then add/remove contacts to the list on the right using the move/remove buttons.



When you are done, click OK.

Using relationships

Each contact may be assigned a relationship. To define a relationship, Click in the *Relationship* column. A drop-down box will be displayed. You could either type the text you want to enter or select from the drop-down list.



To edit the list of relationships appearing in the drop-down list, click the *Relationship List...* button at the bottom left of the window.

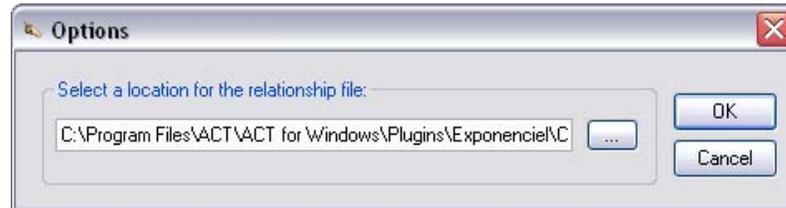


Note: if you edit or delete a relationship, it will not affect previously entered relationships.

Sharing relationships among different users

By default, the relationships are stored in a text file on your hard drive at C:\Program Files\ACT\ACT for Windows\Plugins\Exponencial>ContactLinks.

You can move the file(s) (one file per ContactLinks button) to another location accessible to all users and reference this location by clicking the *Options* button in the Relationship List window (see above).

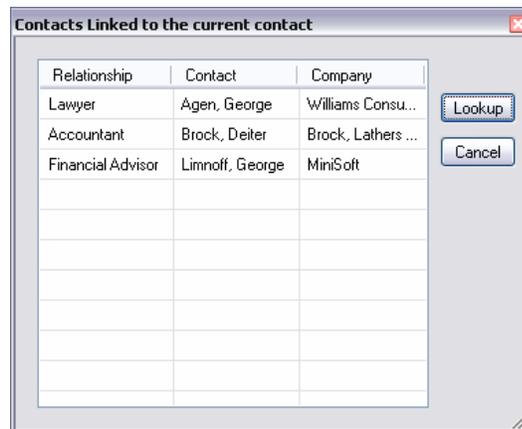


Note: If you have more than 1 ContactLinks button, changing the location will affect all ContactLinks buttons.

Displaying linked contacts

Once contacts have been linked, you have 2 options (You have the option of reversing these settings: see *Changing the behavior of the Go button* below).

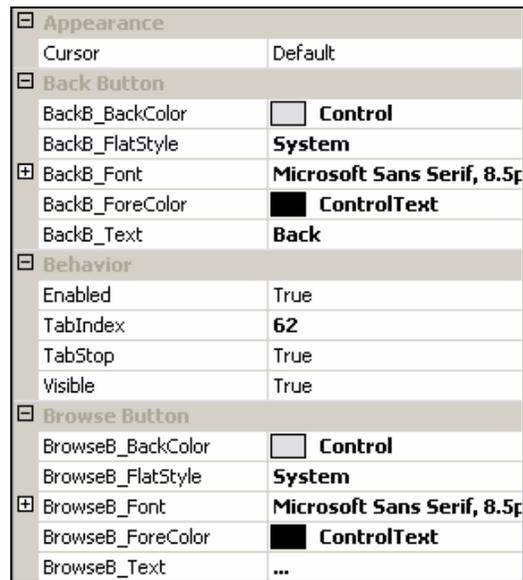
- If you click the *Go* button, it will display the list of linked contacts allowing you to select one or more contacts. Then clicking the *Lookup* button will create a lookup of selected contacts.
- If you click the *Go* button while holding the CTRL key, it will automatically create a lookup of the linked contacts.



The *Back* button is now enabled so that you can go back to your previous lookup and active contact.

Customizing your buttons

To access the properties of a control in the layout designer, better than right-clicking and choosing *Edit Properties...* which offers only limited access to the properties, click F4 (or *View > Properties window*). With the properties window open, select your *ContactLinks* control and you'll see something similar to this:

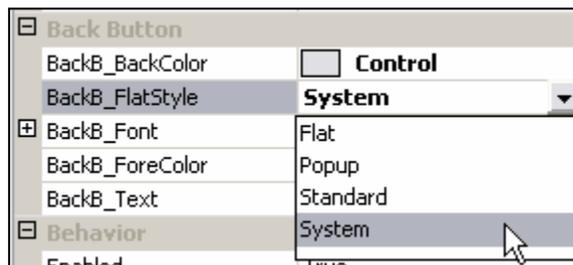


From this window, you control the look and behavior of your *ContactLinks* button.

Changing the text and look of your buttons

Each button has its own section in the *Properties* window, so that it can have its own look. You may change the *BackColor*, *Font* and *ForeColor* as well as the *Text*.

There is also a Flat style property that you can adjust. This property controls the general look of the button. You might want to experiment changing the flat style property. By default, it is set at *System*. It gives the buttons the XP look. Note that while this property is set at *System*, the *BackColor* property is ignored.

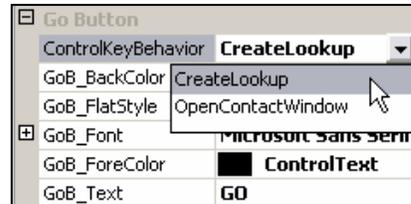


Changing the behavior of the Go button

By default, clicking the *Go* button opens the contact window and if you hold down the CTRL key while clicking it creates a lookup of the linked contacts.

If you are using ContactLinks to create a one-to-one relationship, you might want to reverse these settings because there is not much point in opening the linked contacts window (since there is only one contact to display).

To do this, note that the Go button has a special property called *ControlKeyBehavior*.



If you set this property to *CreateLookup*, you will have the default behavior, ie:

- when you click the *Go* button while holding the CTRL key, it will create a lookup of all linked contacts,
- when you simply click the *Go* button, it will display the *Contacts* window.

If you set it to *OpenContactWindow*, you will have the reverse, ie:

- when you click the *Go* button while holding the CTRL key, it will display the *Contacts* window,
- when you simply click the *Go* button, it will create a lookup of all linked contacts.

Registering ContactLinks

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

Once you get your unlock code, right-click one of the ContactLinks button, and choose About... in the popup menu then enter the code in the appropriate box and click OK.

Support

For support, please contact support@exponencial.com.