Another efficient and affordable ACT! Add-On by

e×ponenciel

Advanced Dropdown Lists

for ACT! 2008 and up

v.6.0

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Purpose of the add-on

Advanced Dropdown Lists is an add-on that allows you to create field dropdowns which content varies based on the value of a reference field.

Installation procedure

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

Note: 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.

How it works

Advanced Dropdown Lists works with schemes. A scheme consists of:
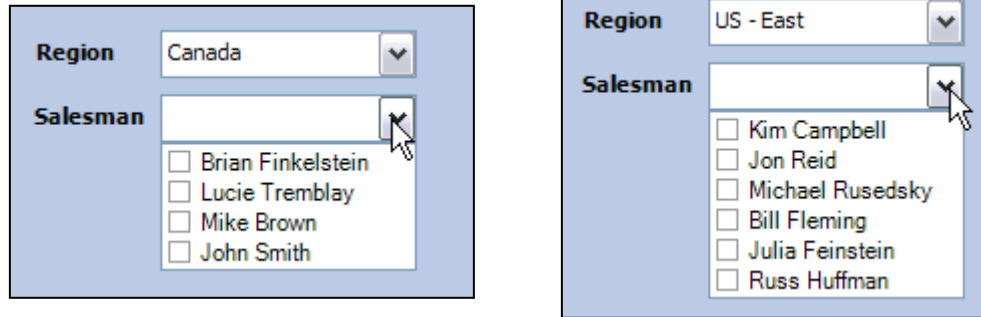- a target field ie. the field you want an Advanced Dropdown List (AD List) attached to;
- a reference field, which values will determine which static list should be attached to the target field
- and a list of associations between a value and a static list.

Here is an example.

Creating a scheme

The first step is to create a scheme. For this, go to ACT! *Tools* menu and choose *Advanced Dropdown Lists*.

In the main window of the program, click the *Add...* button.
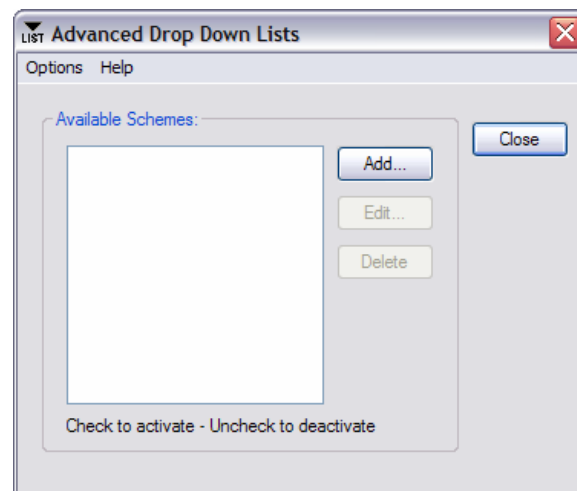
In the next window, you first select the field you want to attach the dropdown list to.

NOTE: Only fields **<u>without</u>** an ACT! dropdown list attached are listed in the first box.

In the second box, you choose the reference field, the field which value will determine which list should populate the AD list.

NOTE: Only field **<u>with</u>** an ACT! dropdown list are listed in the second box.

As soon as you select a reference field, the table below populates itself with the values of the dropdown list attached to the reference field.

Then all you have to do is click the *Static List* column next to the value of your choice to make a box appear with the available static lists (see below on how to add, edit, delete static lists).
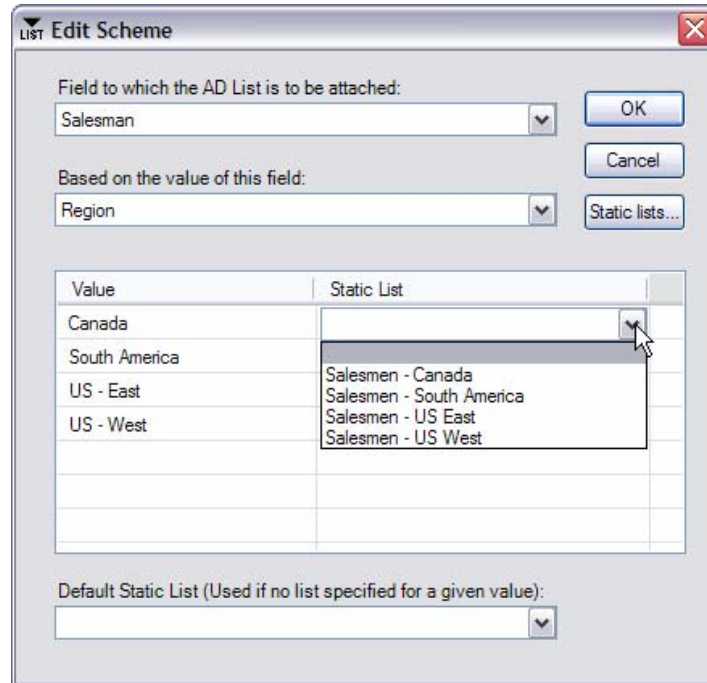
Note the last box at the bottom: it allows you to define a default list that will be applied to all values which you do not associate with a static list.

Adding, Editing, Deleting a Static List

To add, edit or delete a static lists, click the *Static lists...* button in the *Edit Scheme* window or choose *File>Manage Static Lists...* in the main window of Advanced Dropdown Lists.

When you do, you get to the *Manage List*s window which allows you to add, edit, delete a list.
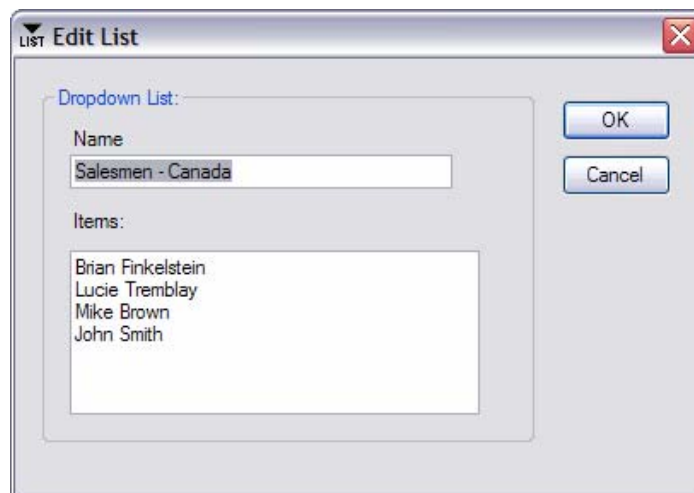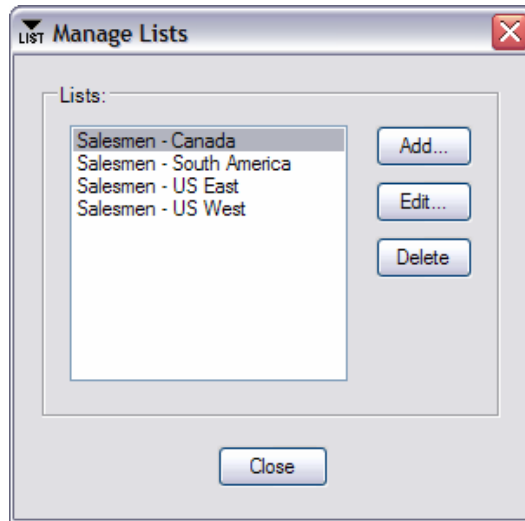
Activating/Deactivating a scheme

By default a new scheme is automatically activated, which means that once you exit Advanced Dropdown Lists, the list will be automatically added to the field. Whenever you want to de-activate a scheme, simply uncheck it in the main window.
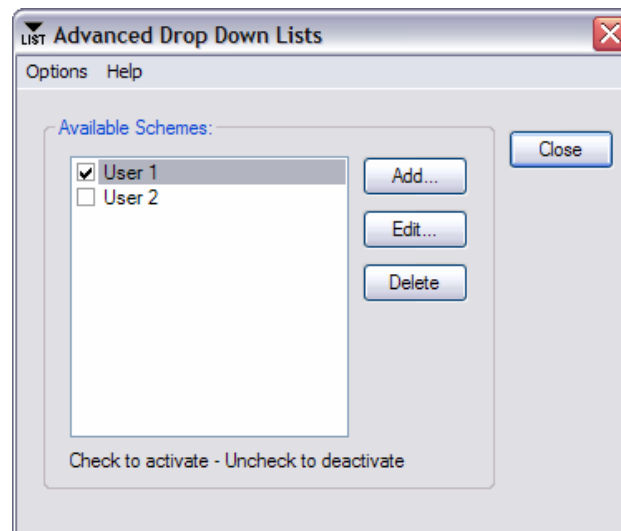

Checked schemes are activated. Uncheck schemes are de-activated.

Sharing your settings over a network

If you have multiple users on a network, you may want to share the schemes among all users so that you do not have to recreate them on each machine. To share the settings with all users, go to the *Options > Preferences* menu and select a folder accessible to all users under *Data Folder*. If you already have created schemes, look for the settings file at the default location and move it to the folder you just selected.

Then adjust the data folder location on all machines so that everyone looks at the same settings file.

Sharing your settings in a synchronization environment

If you are installing to a computer that does not directly access the main database but rather a satellite database that you synchronize to the main database, you may want to place the data folder inside a folder that gets synchronized and reference that folder on the synchronized machine under *Options > Preferences* as described above.

But it is not enough because the file that contains the settings for a database is called by the name of this database. Since a satellite database can not have the same name as the master database, to prevent the synchronized user to have to rename the file everytime, we need to instruct Advanced Dropdown Lists to look for the file of the master database and not of the satellite database. This is done through the Options > Synchronization Environment… menu.
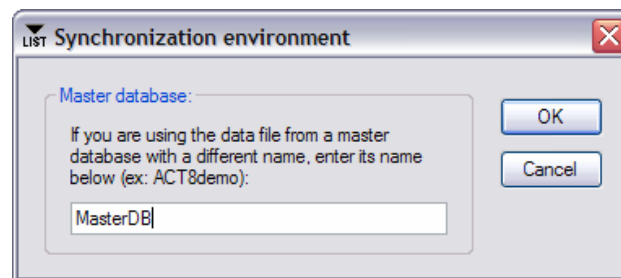
Simply type the name of the master database (without the extension) and from now on, Advanced Dropdown Lists will read the master database settings file.

Registering your product

To continue using this product past 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, either click the Register now button of the nag screen or go to the *Help > About* menu and once the *About* window opens, type the registration code in the appropriate box and click OK. You might need to close and restart ACT! to complete the registration process.

Support

For support, contact support@exponenciel.com.

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