LayoutSwitch

v.4.0

for ACT! 2005

Another efficient and affordable ACT! Add-On by

Table of contents

Purpose of the add-on

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

How it works

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

Stealth mode

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

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!.

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.

ACT! should automatically add an icon to the Contact Detail window and an item to the Tools menu. Icons and menu items are now the only ways to start your Exponenciel add-on.

Upgrade from previous version

If you are upgrading from a version that supported ACT! 5.0, 2000 or 6.0, 2004, you will have to redo the setup because both versions are not compatible.

Important Potential Issue

Because of a bug in earlier versions of ACT! 2005, it was important that you followed this instruction to be able to use the Lookup All command without generating an error and having to close ACT!.

- Add a blank contact and type "<None>" (without the quotes) in your reference field
- Make sure that it is the first contact in your database (it should be unless you have other blank contacts)

Without this additional contact, using the Lookup All function would generate an error.

This problem seems to be gone with version ACT! 7.0.3. So if you don't experience any problem with the Lookup All command, disregard this section. If you do experience a problem, implement the solution provided above to resolve the issue and please let us know at support@exponenciel.com.

Adding icons to other views

To add icons to other toolbars, run LayoutSwitch and go to the *Options*, *Integrate with ACT!* menu. Check the views you want to add icons to and restart ACT!.

When ACT! re-starts, whatever icons you asked to be created should be there to launch LayoutSwitch.

Known issue

If they are missing in a particular view, do a right-click on the toolbar and choose Customize. Make sure all items are checked. Then close the window. Repeat in all views where you are missing an icon. Then re-start ACT! The icons should now be there.

## Automatically starting LayoutSwitch with ACT!

To automatically start the program in Stealth mode, go to the *Options* menu and choose *Startup Options*. Check the *Launch LayoutSwitch when ACT! Starts* checkbox and select the *Go directly to Stealth mode when LayoutSwitch starts* option.

Configuring LayoutSwitch

LayoutSwitch may be used with contact layouts, company layouts or group layouts. We will detail here the setup for contact layouts but the procedure is the same for companies and groups.

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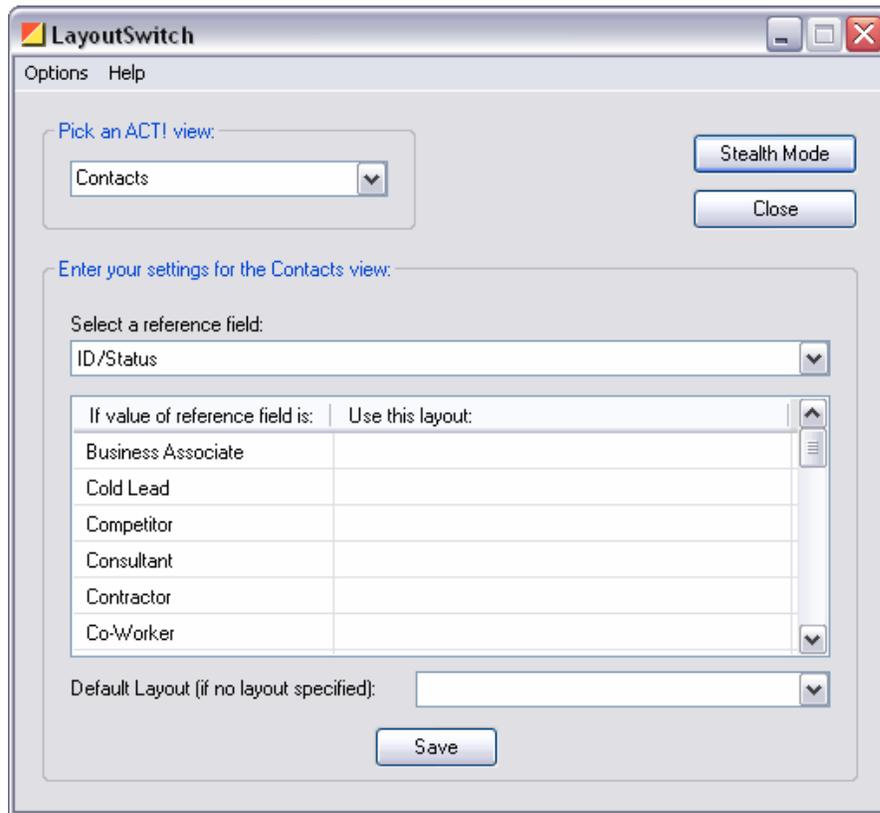
Choose a view

First, you need to tell LayoutSwitch which type of records you want to use customized layouts with. In the *Pick an ACT! View* drop-down, choose between *Contacts*, *Companies* and *Groups*.

Select a reference field

Then you need to select a *Reference field* in the *Select a reference field* drop-down. 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.

### Associate a layout with the reference field values

The grid below the drop-down will automatically populate itself with the possible values of the field (i.e. the values of the drop-down list associated with the field – See ACT! Tools > Define fields… then Manage drop-down lists).

For each of these values, you may associate a different layout. To associate a layout, click in the Use this layout column next to the field value. A list of available layouts will appear.
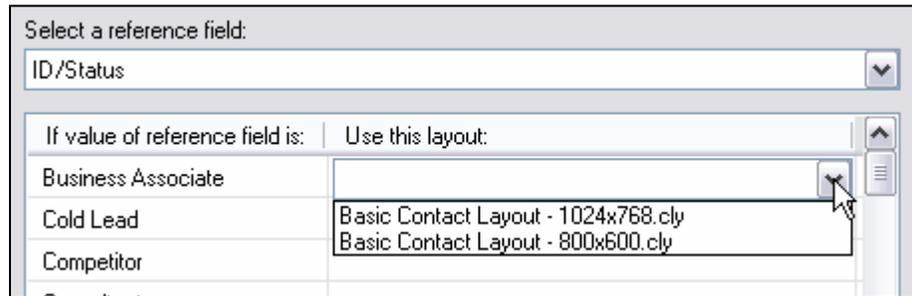
Select a default layout

You may choose to not associate a value with a layout but then it is recommended to choose a default layout. If no layout is associated with the value "Cold lead" for instance and the current contact is a cold lead, LayoutSwitch will use the default layout. If no default layout is set, 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 define a default layout.
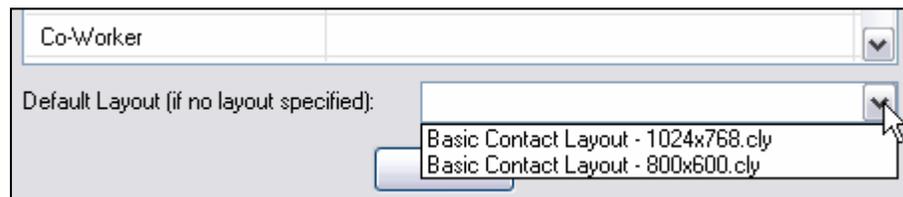
You will be asked to save your changes when closing the window or selecting another ACT! View.

Using LayoutSwitch on a network

Your settings are saved in a settings file which can be shared over a network. The *Options > Settings file location* window shows the location of the settings file currently used.

You may move this file to a common location accessible over your network. Then on each workstation, simply use this same window to locate the file and click Enter.

Support

For support, please contact support@exponenciel.com.

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