

Advanced Layout Tools

Notifier Pack

Another efficient and affordable ACT! Add-On by

e^xponencial

<http://www.exponencial.com>

Table of content

| | |
|---|-----------|
| Purpose of the add-on | 3 |
| Installation procedure | 3 |
| How to add a tool to your layout toolbar..... | 4 |
| How to add a control to your layout | 5 |
| Editing the properties of your controls | 5 |
| The Notifier | 6 |
| Adding the Notifier to your layouts..... | 7 |
| The condition properties | 7 |
| The ImageConditionMet properties..... | 8 |
| The CustomImage properties..... | 8 |
| The DoNotMonitor property..... | 8 |
| The InformationBar | 9 |
| Adding the InformationBar to your layouts..... | 10 |
| Preventing users to change the content of the InformationBar..... | 10 |
| Changing the appearance of the InformationBar..... | 11 |
| Registering your product..... | 12 |
| Support..... | 12 |

Purpose of the add-on

Advanced Layout Tools – Notifier Pack is a set of two controls (and a bonus control) that are designed to draw ACT! users attention to certain field values for better management of their contact relationship.

Installation procedure

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

Due to the nature of the add-on, there is no interface nor icons added to your toolbar: it consists of a set of tools for your layouts.

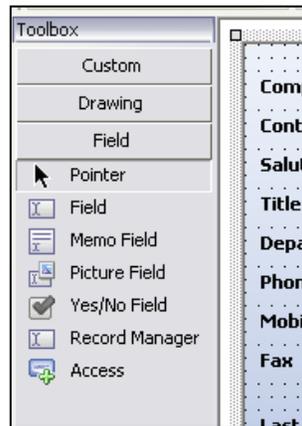
Note that contrarily to versions supporting previous ACT! versions and because of the changes in ACT!, add-ons are now DLL files and not executable files. This means that they are automatically initialized by ACT! when placed in ACT! plugin folder (a subfolder of the main ACT! directory) and cannot be started from the Windows Start menu anymore. This is why you are not given a choice of installation directory during the installation process.

GENERAL INFORMATION REGARDING ADVANCED LAYOUT TOOLS

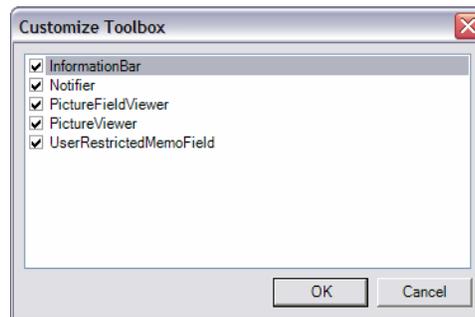
This section applies to all Advanced Layout Tools packs.

How to add an Advanced Layout Tool to your layout toolbar

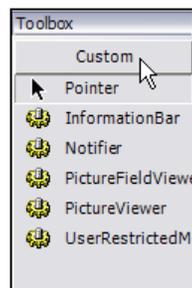
When in ACT! Design Layout mode, if the toolbox is not visible, go to the *View* menu and click *Toolbar*.



Do a right-click on the toolbox and choose *Customize...* A list of available tools is displayed. Check the ones you want to add to the toolbar.



They will be added under the *Custom* tab. To view them click on *Custom*.



How to add a control to your layout

The tools you add to the *Custom* tab of your toolbar allow you to add controls to your layouts. To add a control, use the same method you use to add regular ACT! fields:

- Click the tool in the toolbar
- Then click somewhere in the layout and drag to expand.
- When you release the button of your mouse, the control is inserted in your layout.
- For controls that are bound to a field, a *Select field* window will popup. Choose a field then click OK.

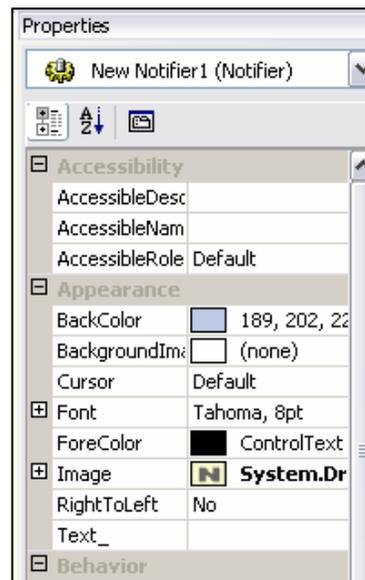
IMPORTANT!

If a control name starts with *Contact_*, *Group_* or *Company_*, it means that it is specific to a type of layout. Inserting a specific control to the wrong layout will generate errors when using it.

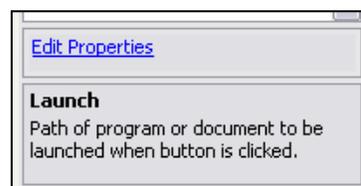
Editing the properties of your controls

In ACT! Layout designer window, if you right-click a control, the pop-up menu lists a *Properties* command which opens a window giving you the ability to edit very few properties.

To really access all properties of a control, select the control then press F4. The property editor will open giving you the ability to fully control the appearance and behavior of your control.



There are many properties you can tweak. If you do not know what a property does, select it then look at the bottom of the properties window for the description.



THE TOOLS INCLUDED IN THIS PACK

The Notifier

The *Notifier* is a control designed to warn you when certain conditions are met. It is bound to a field of your choice and can be setup to handle up to 10 conditions. When the value of the field meets one of the conditions, you have the option to display an icon or image of your choice.

Here is an example:

We have bound a Notifier to a date field that contains a contract expiration date. In ACT! Layout designer window, we have selected the control and pressed F4 to access the Properties window. We have defined the conditions as such:

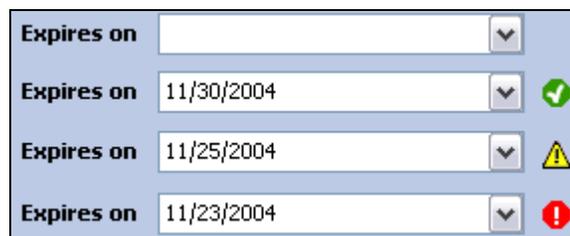
| Conditions | |
|-------------|----------|
| Condition1 | = "" |
| Condition10 | |
| Condition2 | <Now(-5) |
| Condition3 | <=Now() |
| Condition4 | >Now() |
| Condition5 | |

And the images as such:

| | |
|---------------------|-----------|
| ImageCondition10Met | None |
| ImageCondition1Met | None |
| ImageCondition2Met | Green16 |
| ImageCondition3Met | Warning16 |
| ImageCondition4Met | Red16 |
| ImageCondition5Met | None |

The objective is the following:

- If there is no expiry date, we want no image is displayed.
- If the expiry date is more than 5 days away, we want a green icon to be displayed.
- If the expiry date is less than 5 days away, we want a warning icon to be displayed.
- If the expiry date is passed, we want a red icon to be displayed.



Here is the result (today was 11/24/2004)

Adding the Notifier to your layouts

See the first section of this user’s manual to see how to add a tool to your Layout toolbox and how to add controls to your layouts. Here is more specific information regarding the Notifier.

The name of the controls are *Contact_Notifier*, *Company_Notifier* and *Group_Notifier*. Each control is specific to a type of layout (contact, company or group). If you are not going to use the control for some of your layout types, you don’t need to add it to the toolbar.

When adding the Notifier to your layout, you are prompted to select a field. This field will be the one that the notifier will monitor.

You may insert as many Notifiers as you want in one layout.

The condition properties

You can set up 10 conditions which are evaluated one after another. If a condition is met, the next conditions are not evaluated. This means that the order of the conditions is very important.

A condition must start by one of these operators: =,>,>=,<,<=,<>. No functions can be used except the Now() function that returns today’s date. Now(+/-Nb_of_days) returns today’s date +/- a number of days (see above example).

NOTE: When setting up your conditions or your images (below), make sure you expand the property window so that you see the name of the property. Properties are sorted alphabetically which can be somewhat confusing for instance *Condition10* is shown before *Condition2* and *ImageCondition10Met* before *ImageCondition1Met*.

| Conditions | |
|---------------------|---------|
| Condition1 | =True |
| Condition10 | |
| Condition2 | |
| Condition3 | |
| Condition4 | |
| Condition5 | |
| Condition6 | |
| Condition7 | |
| Condition8 | |
| Condition9 | |
| ImageCondition10Met | None |
| ImageCondition1Met | Red16 |
| ImageCondition2Met | None |
| ImageCondition3Met | None |
| ImageCondition4Met | None |
| ImageCondition5Met | None |
| ImageCondition6Met | None |
| ImageCondition7Met | None |
| ImageCondition8Met | None |
| ImageCondition9Met | None |
| ImageNoConditionMet | Green16 |

The ImageConditionMet properties

Each condition may have its own icon or image. There is also an icon for when no condition is met (*ImageNoConditionMet*). 6 icons are supplied with the control (3 of size 16 pixels X 16 pixels and 3 of size 32 pixels X 32 pixels).

The CustomImage properties

If you need more icons or the icons do not suit your needs, you may use the *CustomImage* properties: enter the path to an image on your PC or network. *Notifier* will accept any image format and will resize itself automatically to the size of your image. So you may use any size you want and even use different sizes for different conditions.

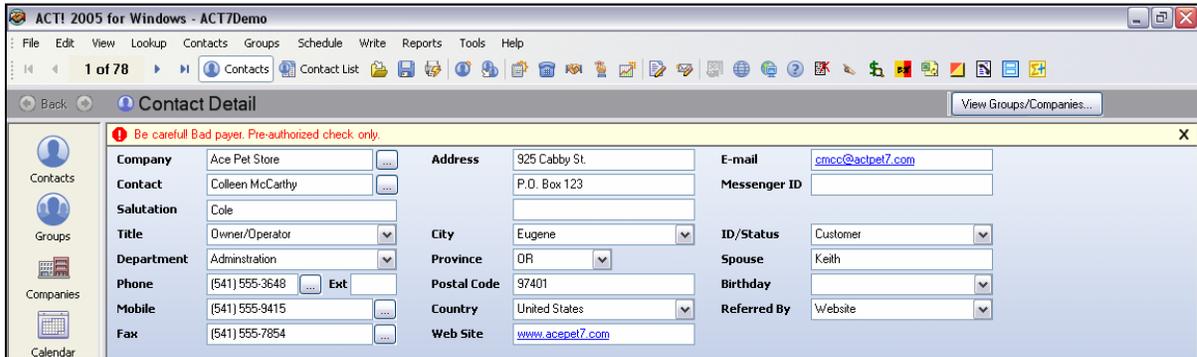
Make sure you set the corresponding *ImageCondition* property to *Custom* otherwise the *CustomImage* property will be ignored.

The DoNotMonitor property

By default, the Notifier monitors the value of the field it is bound to and adjusts itself automatically when the field value changes. If you rarely change the value of the monitored field, set this property to true and the control will only refresh itself when the record is changed. You might save a (tiny) bit of computer resources.

The InformationBar

The InformationBar displays the content of the field it is associated with in an InformationBar similar to the information bar used in Internet Explorer. It is docked at the top of the window (the main Detail pane as shown below or the tab pane if under a tab).



The InformationBar only appears if the associated field is not empty. It can be dismissed by clicking it. The icon, color and font are fully customizable.

| Appearance | |
|-----------------|---|
| BackgroundColor | Info |
| CustomIcon | |
| Icon | RedExclamation |
| InformationFont | Microsoft Sans Serif, 8.25p |
| TextColor | Red |

NOTE: If you make a change to the associated field, the bar is updated the next time the record is displayed (in other words, you need to switch to another record and come back to see any changes made to the associated field).

Adding the InformationBar to your layouts

See the first section of this user’s manual to see how to add a tool to your Layout toolbox and how to add controls to your layouts. Here is more specific information regarding the InformationBar.

The name of the controls are *Contact_InformationBar*, *Company_InformationBar* and *Group_InformationBar*. Each control is specific to a type of layout (contact, company or group). If you are not going to use the control for some of your layout types, you don’t need to add it to the toolbar.

When adding the InformationBar control to your layout, the location does not matter. It will automatically dock itself at the top of the pane. After you have inserted the control, you are prompted to select a field. This field will be the one containing the information displayed in the bar.

You may insert as many InformationBar as you want in one layout. If the associated fields are not empty, they appear one below the other.

The associated field, which can be a regular field or a memo field or a RestrictedUserMemoField (see next), may be placed wherever you want, under a tab for instance, since it does not need to be seen. It is only used to change the text of the information bar. You may also choose to remove it from your users layout.

IMPORTANT

If you want to include the associated field in the same layout as the InformationBar, make sure you insert the associated field first. Once the InformationBar is in the layout, the associated field will not be available for insertion anymore (therefore you will need to remove the InformationBar control first in order to add the field to the layout).

Preventing users to change the content of the InformationBar

Since the content of the InformationBar is in a field, any user with editing rights may change its content unless you remove it from the layout but still some users may have access to the ACT! Layout editor and could put it back in. Depending on the information you want to display, it may not be acceptable. In this package we have included a bonus control called *UserRestrictedMemoFieldInfoBar*.

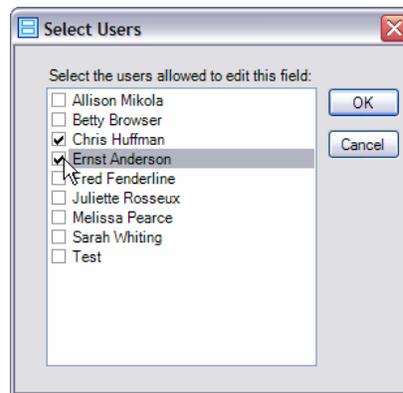
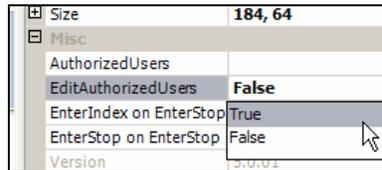
This special field control allows to specify which user can edit its content. It behaves like a regular memo fields. By default, All administrative users are granted editing rights and any administrative users can set other user’s editing rights for this control.

If you want to benefit from this control, choose a *UserRestrictedMemoField* instead of a regular field or regular memo field to display the content of the associated field.

The name of the controls are *Contact_UserRestrictedMemoFieldInfoBar*, *Company_UserRestrictedMemoFieldInfoBar* and *Group_UserRestrictedMemoFieldInfoBar*. Each control is specific to a type of layout (contact, company or group). If you are not going to use the control for some of your layout types, you don’t need to add it to the toolbar.

As we said, by default all administrators are allowed to change the content of the field. If you are satisfied with this, skip the next step.

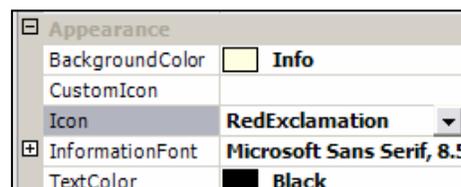
Once you have inserted the *UserRestrictedMemoFieldInfoBar*, make sure it is selected then press F4 to open the Property editor. Go to the *Misc* section at the bottom and set the property named "Edit AuthorizedUsers" to True. A window will popup to allow you to setup which users are authorized to edit the field.



Note: once you have selected at least a user, you will need to select all the users you want to have editing rights whether administrator or not. If an admin user is not selected, it will not have access anymore.

Changing the appearance of the InformationBar

You may change the background color, the font and text color as well as the icon of the bar. Look for the various properties under Appearance.



You can choose between 14 default icons in the *Icon* property or you may specify your own icon. Simply enter the path to your custom icon in the *CustomIcon* property. This will overrides the *Icon* property setting.

Registering your product

To continue using this product passed 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, right-click one of the controls of the pack in your layout and select *About..* Once the *About* screen is open, 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.

Rev. November 23, 2005