

Advanced Drop-down Lists

v.1.1

Another efficient and affordable ACT! Add-On by



<http://www.exponencial.com>

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Purpose of the add-on

Advanced Drop-down Lists allows to attach conditional or dynamic drop-down lists to your ACT! fields.

- conditional lists are lists which items change depending on the value of another field.,
- dynamic lists are lists which content is created every time: they allow to list group names, subgroups names, contact or company names.

Installation procedure

Download the program file from our [download page](#) and double-click it to start the installation. Follow the instructions and once the installation is completed, run ACT! and open your database.

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

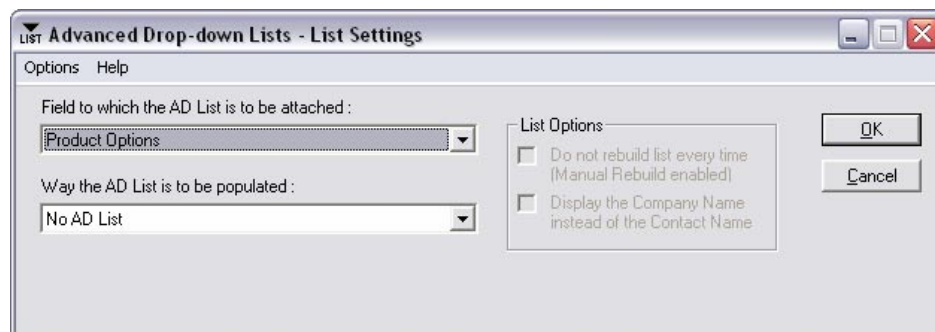
While your database is open, click the Windows *Start* button, go under *Programs*, locate the *Exponencial ACT! Add-Ons* group and click *Advanced Drop-down Lists* to launch the program. Once on the main screen, go to the *Options | Integrate with ACT!* menu and add an icon or menu items to your ACT! 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 Advanced Drop-down List.

Creating an Advanced Drop-down List

You may attach an AD List to any character field **without a regular ACT! drop-down list**.

To setup an AD List, the best way is to launch the program by clicking the button on the toolbar. The following window appears.



1. You first need to pick the field to which the AD List will be attached in the *Field to which the AD List is to be attached* field. Note that only the character fields without a drop-down will appear in the list.

Note: If the field of your choice does not appear in this drop-down, close the add-on, go to ACT! *Edit | Define fields...* menu, select the field and make sure it is a character type field, the entry rules are set to none and, under the *Drop-down* tab, uncheck all checkboxes.

2. Then choose an option in the *Way the AD List is to be populated* field.

The different ways to populate your AD list

List of All Groups

The first option is to populate the AD list with the names of the groups in your database. In this case, Advanced Drop-down Lists will display the refreshed list of your groups (sub-groups will not be included).



If you have lots of groups (depending on your computer hardware), there might be a delay before the AD list is displayed. If so, you may want to choose the **Do not rebuild list every time (Manual Rebuild enabled)** option. In this case, the list of groups will be stored in a file. Reading this file will be faster than querying ACT! each time. You'll have to refresh the data file manually by clicking the Refresh button at the bottom of the list.



List of the Subgroups of one GROUP

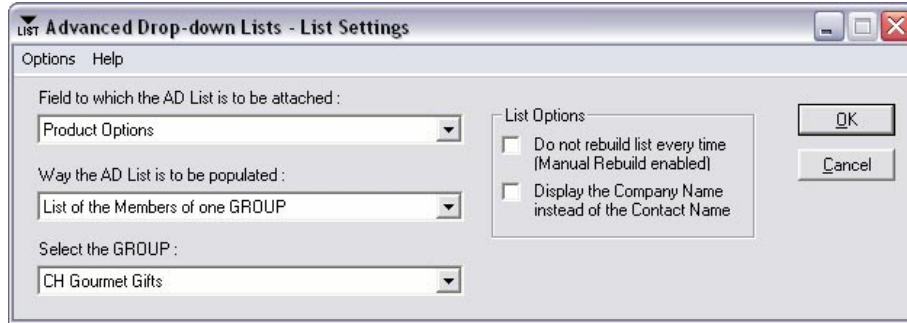
In this case, only the subgroups of one group will be shown. When you select this option another field named *Select the GROUP* will appear so that you can pick the group.

If you have lots of sub-groups to the point that it slows down the displaying of the list, you may want to choose the **Do not rebuild list every time (Manual Rebuild enabled)** option (See List of All Groups, above)

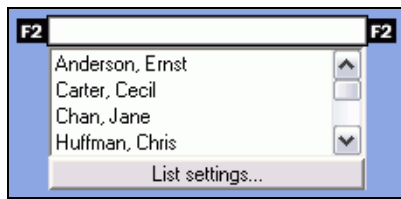
List of the Members of one GROUP

Choose this option to have the list display the members of a group. When you select this option another field named *Select the GROUP* will appear so that you can pick the group.

By default the list will display the Contact names, but when you choose this option the checkbox named *Display the Company Name instead of Contact Name* will be enabled. Check it to display the Company names instead of the Contact names.



If you have lots of sub-groups to the point that it slows down the displaying of the list, you may want to choose the **Do not rebuild list every time (Manual Rebuild enabled)** option (See List of All Groups, above)



Here, contact names are read dynamically



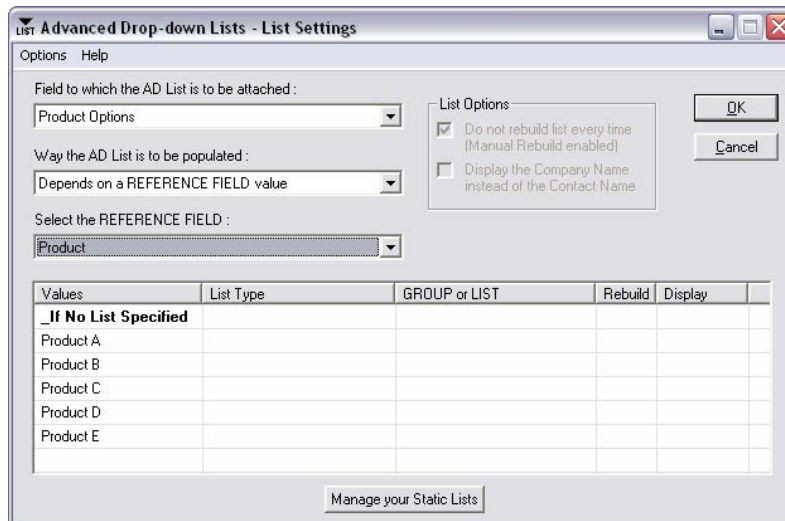
Here, company names are read from a data file which you an refresh manually by clicking the button

Depends on a REFERENCE FIELD value

This option allows to populate the list based on the value of another field. When you select this option another box named *Select the REFERENCE FIELD* will appear so that you can pick the field which values will serve as a reference.

NOTE: The *Select the REFERENCE FIELD* box will only display character fields with drop-down lists.

Once you pick a reference field, a table with several columns will appear:



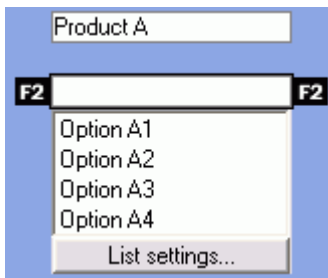
The first column contains the values of the reference field drop-down list. For each of these values, you may choose a list type. The list types are the same we just described: List of All Groups, List of the Subgroups of one GROUP, Members of one GROUP plus a new one named Static LIST. If you choose any of the 3 options we have already seen, the subsequent columns will allow you to make the same option choices as seen above.

The Static List type allows to associate lists that you create and manage by clicking the *Manage your Static Lists* button below the table (See Managing your Static Lists below). You may create as many lists as you want so that you may associate them with each values of your reference field.

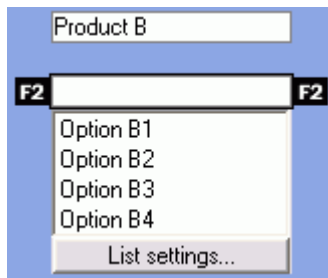
These lists are called Static list because their content does not change automatically (as opposed to the list of groups which would be changed automatically when a group is added or removed). The drop-down lists that you create with ACT! are static.

Here is an example of what you can achieve with this option. See the online help for animated demos.

The "Product" field is set at "Product A". "Product option" drop-down list displays a list of options specific to "Product A"



The "Product" field is set at "Product B". "Product option" drop-down list displays a list of options specific to "Product B"

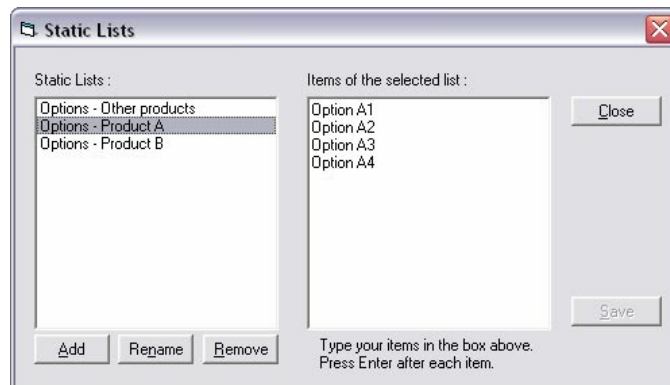


The "Product" field is set at "Product E". "Product option" drop-down list displays a list of options for "Other products".



Managing your Static Lists

The *Manage your Static Lists* button opens the *Static Lists* window which allows to add, rename, remove and edit your lists.



Adding a list

To create a list, click the Add button. You'll be prompted to name the list. Then click in the *Items of the selected list* text box and type your first list item then press Enter. Type each item and press Enter after each. They will appear one below the other.

Editing a list

To edit a list, first select it in the list on the left so that its items are shown in the *Items of the selected list* text box. Each item is displayed below one another. To edit the list, simply click in the text box and type. Once you made the appropriate changes, click the Save button to save the changes.

NOTE: If you click the Close button without saving your changes, you will be prompted to say whether you want to save all unsaved changes.

Removing a list

Simply select the list and click Remove.

Displaying an AD List

When Advanced Drop-down Lists is launched, it checks which ACT! field is currently active (i.e. the field in which the blinking caret is positioned).

If the active field has an AD List associated with it, it will display the list. If the active field does not have an AD list then the *Settings* window will be displayed.

The default method to launch the add-on is to click the button that was added to the *Contacts* toolbar. It seems appropriate for setting up lists but does not seem too convenient for displaying the AD lists themselves.

Our recommendation is to associate a shortcut with the program so that all you have to do when you are in a field with an AD list is use the shortcut. We recommend that you use the F2 key. F2 is ACT! built-in shortcut to display the Edit List window allowing you to edit a standard drop-down list. So it makes sense to use this same (usually well-known) shortcut to display the AD List.

Note that assigning the F2 key shortcut to Advanced Drop-down Lists will not affect the built-in behavior of F2.

Unfortunately there is no automatic procedure to assign the F2 shortcut to Advanced Drop-down Lists so you have to do it manually. Fortunately it is very simple.

If you do not want to use the F2 key but rather another shortcut, follow the procedure described below and at step 10, press the shortcut you wish to use. If you don't want to use a shortcut at all, you could still press the Advanced Drop-down Lists button on the Contacts toolbar.

Instructions for associating the F2 key shortcut to Advanced Drop-down Lists

1. Open ACT! and make sure you are in the *Contacts* window.
2. Do *Tools | Customize contacts window*.
3. Click on the *Custom Commands* tab.
4. Click *New*.
5. Type "Advanced Drop-down Lists " in the *Command Name*, *Description*, *Tooltip Text* and *Menu Text* fields.
6. Click the *Browse* button, go to the folder in which Advanced Drop-down Lists is installed and select **adl.exe**. Then click *Open*. You should be back to the *Customize ACT! Contacts Window*.
7. Click *Apply* (if you mistakenly click OK, repeat steps 1 and 2).
8. Click the *Keyboard* tab, select *Custom Command* at the very bottom of the *Categories* drop-down list.
9. Select *Advanced Drop-down Lists* and click the *Assign Shortcut* button.
10. Press the F2 key. F2 should appear in the *Press new shortcut key* field. Click *OK*.
11. Click *OK* to close the *Customize ACT! Contacts Window*. You're done!

Once the shortcut is set, when you press the F2 key:

1. If the active field (blinking caret) with a regular ACT! drop-down, the Edit List window will appear (regular ACT! behavior).
2. If it is a field to which you attached an AD List, the list will appear.
3. If the field does not meet one of the above conditions, then the Advanced Drop-down Lists Settings window will be displayed.

Recognizing which fields have an AD List

As we have seen, the way to make your AD list appear when you are in a field for which you created an AD list is to either press the Advanced Drop-down Lists button on the *Contacts* toolbar or press the *F2* key (or any other shortcut you decided to use – see above).

Unlike a regular ACT! drop-down list, an down arrow will not appear at the extreme right of the field to notify you that there is a list associated to it.

Therefore we recommend that you find a way to identify the fields with an AD list by editing your layout. There are obviously numerous ways to do it. We can suggest changing the background color of the field or adding a note next to the field. We have included a small picture file called *f2.bmp* and located in the add-on folder for this purpose.

How to edit your layout

To edit your layout, go to ACT! *Tools* menu and choose *Design Layout*.

To change the background of a field, do a right-click on the field and choose *Properties*. To add the F2 picture, open the *F2.bmp* with a graphic program (like Paint), select the graphic and copy it to the clipboard (CTRL+C), go back to your layout window and do *Edit | Paste*. The graphic will be pasted in your layout. Simply drag it where you want and repeat as needed.

Forcing the user to select from the AD List

Like with a regular ACT! drop-down list, it is possible to prevent the user from typing in the field in order to force her/him to select from the list instead. This feature is useful to control user entry but should only be used when all possible entries are listed in the drop-down list.

To achieve this result, simply make the field a protected field. When a field is protected, a user cannot change its content, but Advanced Drop-down List can.

Protecting a field

To protect a field, go to ACT! *Edit | Define fields* window and choose *Protected as Entry rules*.

Note: When a field is protected, its background is grayed out.

Clearing the content of a protected field

Since you cannot type in a protected field, the DELETE and BACKSPACE keys will not work. If you want to clear the data in your protected field, do a right click on the list or on the button(s) at the bottom of the list. Advanced Drop-down Lists will ask you to confirm your choice.



Selecting multiple items in the drop-down list

The drop-down list does not allow to select multiple items in a single operation but if you press the CTRL key while selecting an item in the drop-down the selected item will be appended to the current field value (in fact, the items will be sorted alphabetically as in ACT!).

Network options/Settings and Data files location

Sharing your settings and data files

If you wish to share your settings between multiple workstations over a network, go to the Options menu of the Settings window and select Settings. You will be able to specify the path of the folder in which the settings and data files are kept.

Moving your settings and data files

If you want to change the location of your Settings and data folder (which, by default, is the Data sub-folder of the folder in which the add-on is installed), simply copy all files in your current Settings and data folder to the new location and change the location specified under Options | Settings

Animated tutorials – Online help

The *Help* menu gives you access to our *Online Help* where you will find a number of animated tutorials showing how to set up buttons, etc.

Registering Advanced Drop-down Lists

You may buy licenses from [Exponencial](#). Registration is based on ACT! user names, so you will have to supply your ACT! username when registering. Once given a registration code, go to the *Help | About* menu and type the registration code in the box below your username.

Support

For support, please contact support@exponencial.com.