

# Advanced Field Protection

v.5.0

for ACT! 2006

Another efficient and affordable ACT! Add-On by

**e<sup>x</sup>ponencial**

<http://www.exponencial.com>

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## Table of content

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<b>Purpose of the add-on .....</b>	<b>3</b>
<b>Installation procedure .....</b>	<b>3</b>
<b>Security.....</b>	<b>3</b>
<b>How it works .....</b>	<b>3</b>
<b>First Step: Creating schemes.....</b>	<b>4</b>
<b>Second Step: Associating users with schemes .....</b>	<b>5</b>
<b>Editing, deleting a scheme .....</b>	<b>6</b>
<b>Installation on multiple computers .....</b>	<b>6</b>
On a network .....	6
In a synchronization environment .....	6
<b>Registering your product.....</b>	<b>7</b>
<b>Uninstalling the product .....</b>	<b>7</b>
<b>Support.....</b>	<b>8</b>

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## Purpose of the add-on

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*Advanced Field Protection* gives you full control over which user can edit a field or see a tab in your contact, company and group layouts.

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## Installation procedure

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

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.

### **IMPORTANT NOTE:**

**No icon will be added to the toolbar, since the main program is only designed to be used very occasionally and not by the user itself. The only way to access the program is from the Tools menu.**

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## Security

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When you first install the product, you are prompted to choose a password. You will be asked for this password whenever you launch, re-install or un-install the add-on. This is a protection against users trying to tamper with or uninstall the add-on.

You may change your password from the main screen by using the *Options > Change Password...* command.

Note that **only users with Administration rights may change the settings of the program.**

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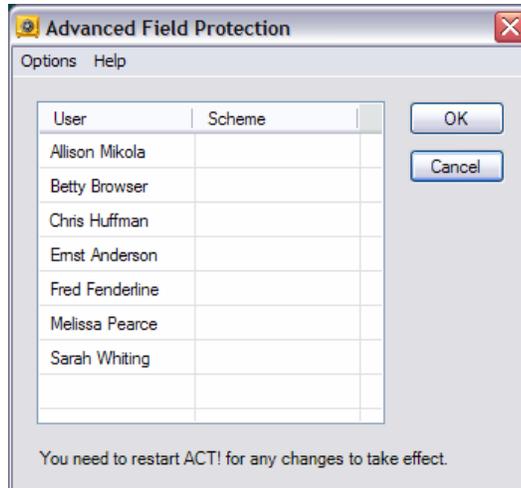
## How it works

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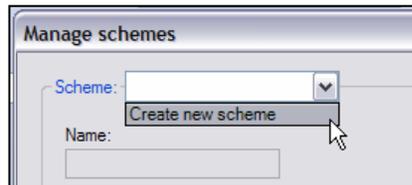
You may create different schemes containing the information of the fields you want to disable and the tabs you want to hide. Then you associate a scheme to the users of your choice. In other words, you may create and associate a scheme for a type of user and another scheme for another type of user.

## First Step: Creating schemes

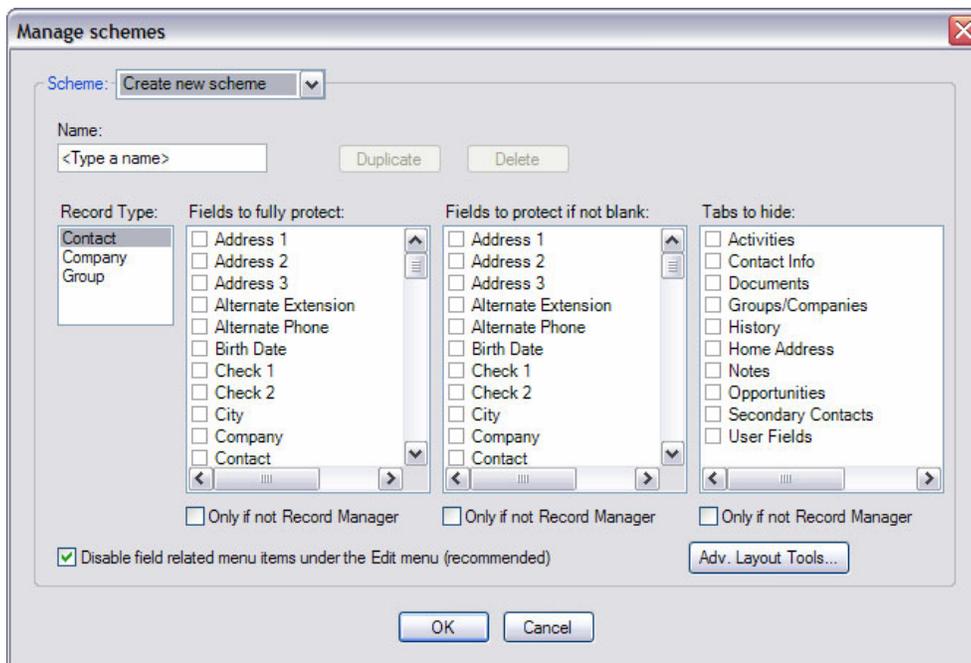
Launch the add-on from ACT! Tools menu: *Tools > Advanced Field Protection*.  
Once you enter your password, you will get to the main screen.



Go to the *Options* menu and choose *Manage Schemes...* In the *Scheme* dropdown, choose *Create new scheme*.



The lists will automatically fill themselves.



Type a name in the *Name* textbox.

You have 3 lists available.

- In the first list, check the items you want to fully protect. A fully-protected field is a field that will always be disabled for that scheme.
- In the second list, check the items you want to protect if not blank. In this case, a user associated with this scheme will be able to initialize the field but once the information is saved, the field will be disabled. (Note that it actually requires to move to another record or another screen for the field to be disabled).
- In the third list, check the tabs that you want to completely hide. (Note: it is not possible to disable a tab in Windows, so the only way to restrict access to a tab is to make it disappear).
- **NEW in 5.1** If you want the protection of fields or hiding of tabs to happen only for records not managed by the current user, check the *Only if not Record Manager* checkbox.

*Advanced Field Protection* works with Contact, Company and Group records, select the Record Type and the lists will adjust themselves automatically

Notes:

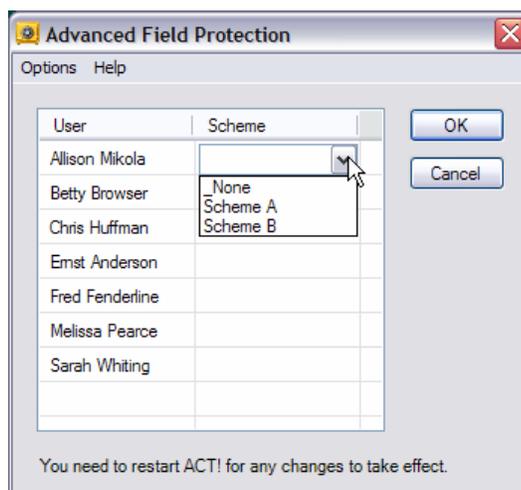
- Since the lists are mutually exclusive, if you select a field in one list and later select it in the other list, the field will be automatically de-selected in the first list.
- It is possible to disable the Hierarchy box in the Companies and Groups Detail screen. We added a Hierarchy entry in the list of fields to that effect, even if Hierarchy is not a field.

Click the *Save* button to save your scheme. You may create as many schemes as you want.

Click *OK* when you are done and you'll be back to the main screen.

## Second Step: Associating users with schemes

In the main screen, simply click in the *Scheme* column next to the user you want to associate a scheme with. A drop-down list will appear with the available schemes. Select the scheme you want. When done, click *OK* and the data will be saved.



If a user is not associated with a scheme, he will have access to the commands as per his ACT! security role.

**NOTE:** If you want apply a scheme to yourself or changes to your scheme, you will need to Close ACT! and re-open it for the changes to take effect.

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## Editing, deleting a scheme

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To edit a scheme, go to the *Options > Manage schemes*. In the *Manage schemes* window, select the scheme you want to edit and check/uncheck the commands as necessary. Then press the *Save* button.

To delete a scheme, follow the same steps and press the *Delete* button. Once a scheme is deleted, the users associated with that scheme are automatically reset (ie. not associated with any scheme).

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## Installation on multiple computers

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### On a network

If you are installing on multiple workstations that access the same database, you may copy the *data.dat* and *users.dat* located at *C:\Program Files\ACT\ACT for Windows\Plugins\Exponencial\Advanced Field Protection* to the other computers to avoid having to recreate all the schemes and associations.

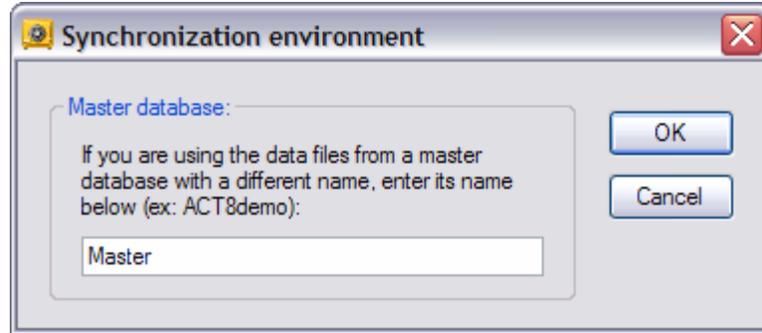
**IMPORTANT NOTE: This will only work if you used the same password when installing Advanced Field Protection.** If you already have installed AFP and used a different password, first run AFP and change the password (*Options>Change Password*) before copying the files, otherwise AFP will believe you tried tampering with the files and will protect all the fields of your database.

### 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, the method described above will not be enough because the settings are associated with the database name and satellite databases have to have a different name than the master database.

So if your master database is called *Master* and your satellite database is called *Satellite1* and you want to copy the data files from *Master* to the computer where the *Satellite1* database is installed, as explained under *On a network* above, you need to instruct Advanced Field Protection to use the *Master* database settings instead of the settings for the currently open database.

To do this, once logged into *Satellite1*, launch Advanced Field Protection, go to *Options > Synchronization* environment and type the name of the Master database.



Advanced Field Protection will close and once you re-open it, the settings from the *Master* database will be displayed. You will need to re-start ACT! for the actual field protection to take effect.

## Registering your product

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To continue using this product passed the trial period, please buy a license at [www.exponencial.com](http://www.exponencial.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.

## Uninstalling the product

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To avoid a user uninstalling the program to neutralize it, the install procedure is a bit unusual. There is no entry in the Control Panel Add Remove Programs module. You will need to go to the installation location (by default C:\Program Files\ACT\ACT for Win 7\Exponencial\Advanced Menu Management) and double-click the uninstall.exe file. You will then be prompted to enter your password to authorize the uninstall.

## **Support**

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For support, contact [support@exponencial.com](mailto:support@exponencial.com).

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