

# Dependent Drop Down

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## Installation and Usage

ACT! offers an option within the Field Definitions to provide a “drop down” list, or “pick list” of values to facilitate data entry ease and consistency. The database administrator establishes a list of values, and the user can select one or more of the values for any contact. However, each field has one and only one list of choices.

Some applications would benefit from having different sets of values on the drop down list, depending on the value selected for another field. For example, once the State is selected, it might be beneficial to allow the user to select the zipcode from a list of zipcodes for the selected state, rather than from a list of ALL zipcodes. Or, once the Sales Office has been selected, the user could select the Sales Rep from a list of Sales Reps that are assigned to that office, rather than from a list ALL Sales Reps. Or, once the Product has been selected, select the Model from a list of models for that product, rather than from a list of ALL products.

**Dependent Drop Down** offers the ability to specify a set of values that are allowed for any particular field ( the “dependent field”), based on the value in some other field (the “independent field”). When the user displays the Dependent Drop Down list, the values that are displayed for selection are limited based on the “independent value” already present in the “independent field”.

You can set as many of these Dependent Drop Downs as you need in your database, on both contact and group records.

## Installation

1. Shut down all running programs
2. Run **Install\_DependentDropDown.exe**
3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will install **c:\program files\tnhg\DependentDropDown.exe** on your hard-drive, and make available some other files that may come in handy when implementing Dependent Drop Down (see below).

Users of Windows 95, 98 and NT may need to heed the Microsoft knowledge base article found at <http://support.microsoft.com/default.aspx?scid=kb;en->

<us:Q239114&id=Q239114#2> in order to load the version of MS Jet Engine needed to support MS Access 2000 database usage.

## Usage

### Adding the fields to your database

Start ACT! and open any database. Select the **Edit** menu. Select the **Define Fields** option. For each Dependent Field you want, you will need to add two (2) fields – one to hold the selected value(s), and the to act as the “dropdown button” to activate the DependentDropDown program for that Dependent Field.

Click the [New Field] button. Change the field name from “New Field 1” to the name you want your field to have – for example, “Sales Rep”. Set the other attributes as appropriate for your requirements. On the “Drop-down” tab, **UNCHECK ALL THE OPTIONS!** (You will NOT be using ACT! drop-down features for this field!) On the “Triggers” tab, leave all the fields blank.

Now click the [New Field] button again. Change the field name from “New Field 1” to the same name as that which you just added, appending “DDD” to the end of the name – for example, “Sales Rep DDD”. Set the field type to “Character”, set the Number of Characters to 1 (one), and leave all the other “Attributes” with the default value. On the “Drop-down” tab, **UNCHECK ALL THE OPTIONS!** On the “Triggers” tab, set the “On entry trigger:” to:

```
C:\progra files\tnhg\DependentDropDown.exe iiii/dddd
```

Where the *iiii* is the Field Number of the Independent Field (for example, Sales Office) and *dddd* is the Field Number of the Dependent Field (for example, Sales Rep). *You may need to use the actdiag Database Structure report, or a similar tool, to determine the field numbers of your Independent and Dependent fields.*

Repeat this process for each of the Independent/Dependent field relationships that you want to have in your database.

### Adding your Dependent Fields to the Layouts

You will need to add both of your newly added fields to the layouts where your users will see and use them. Add the Dependent Field to your layout in the normal way (see the ACT! Help menu for assistance in using the ACT! Layout Editor). Your users will find it easiest to use DependentDropDowns if you also do the following:

(The following steps adds a “drop-dwon button” to the right of the Dependent Field, similar to the button that ACT! displays on fields with Drop-down lists when the cursor enters that field. These “dropdown buttons” are always present, but present a very familiar “look and feel” to the ACT! user.)

For each Dependent Field, select the “Box” tool on the Layout Editor toolkit. Draw a box that just covers the Dependent Field on the layout. Now select the “arrow” tool on the Layout Editor toolkit. Right click on the box, and choose the “Move to front” option. Right-click on the box again, and select Properties. Select the “transparent” option for the “Fill Color” and for the “Frame color”, and select the “simple line” (top option) for the “Frame style”. Click [Apply] then click [OK]. Now, select the “Field” tool from the Layout Editor toolbox, and drag a small square immediately to the right of the Dependent Field (which is now “covered” by a transparent box”). Make this new, small box a square, just tall enough to match the Dependent Field box height. Select the “DDD” field (the one that ends with “DDD” and that has the On Entry Trigger” defined to it) for that newly added field. Switch to the “arrow” tool on the Layout Editor Toolbox. Right-click on the newly added field, and choose the Properties option. Select the “transparent” option for both the “Fill color”, and select the “simple line” (top option) for the “Frame Style”.

With ACT! still running, and the Layout Editor still active, start Windows Paintbrush (left click on your Start button, choose Programs, choose Accessories, choose Paint). In Paint, select the File menu, select Open, and navigate through your folder structure to the c:\program files\tnhg folder. Select “DropDownButton16.bmp” as the file to open. Select the Edit menu. Select “Select All”. Select the Edit menu again. Select “Copy”. Use the Alt-Tab key combination to switch back to the ACT! Layout Editor. Select the Edit menu. Select “Paste”. Drag the pasted image so that it “covers” the newly added small square field. Right-click on the image, and choose the “Move to back” option.

You now have an ACT! field that cannot be accessed by the user (because it is “covered” by the transparent box) and that will be “filled” by the DependentDropDown program whenever the user clicks on the “dropdown button”. The “dropdown button” is actually an empty ACT! field that “transparently covers” the picture of the button, so that when the user clicks on the picture, they actually “enter” the DDD-trigger field, activating the DependentDropDown program.

## Using Dependent Drop Down

When a user clicks the Dependent Dropdown “button”, the Dependent Drop Down program opens a “floating window” over the ACT! window, that displays a list of all the values currently defined as “allowed”, based on the value in the Independent field. The currently entered or selected values are “highlighted”, or “selected” in the list. Any values which are present in the current value of the

Dependent field but are NOT on the list of “allowable” values are shown in a field box below the list.

The user can use the Ctrl-click combination to select additional items, or remove previously selected items, from the list of “allowable” values. The user clicks the [OK] button when done modifying the selected entries for the field.

If the user has Administrator rights within the ACT! database, there is an addition button visible to that user: the [Edit List ...] button. If the user “click” that [Edit List...] button, another window opens that displays all the “allowable” values, with buttons to [Add], [Modify] and [Delete]. Select the [Add] button to specify a new value that is to be allowed for the Dependent Field when the Independent Field has the current value. Provide that new value, then click [OK] to return to the display of allowable values. Select any item on the list and click [Modify] to change the existing entry. Make the desired changes, then click [OK] to return to the display of allowable values. Select any item on the list and click [Delete] to remove an existing, allowable value. You will be warned that such a deletion cannot be undone, and asked if you really want to continue to delete the entry. Reply [No] to leave the existing entry present, or click [Yes] to permanently remove the selected value from the list of allowable entries. **It is important to understand that deleting an item from the list does NOT remove it from any previously existing selections. Any use of that value in the Dependent Field on any existing record will REMAIN and will NOT be removed.** You are simply removing the option from future choice, but you have NOT changed any existing field or records! Existing records that have the deleted value in their set of selected values will show this no-longer-acceptable value in the “Other Items” field in the window displayed by the Dependent Drop Down program.