

# ACT! Layout Manager

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## Installation and Usage

ACT! **Layout Manager** automatically switches the ACT! Contact Layout, based on a field value on the Contact record, or on the name of the database.

There is no “link” between an ACT! database and an ACT! layout – until now!. Once you start the ACT! Layout Manager, every time you open an ACT! database, the layout will change to the layout with same name as the database.

In addition, if you add a Contact field to your database, and populate it with the name of the layout you want to use when displaying each contact’s record, every time you move to a new contact, the layout will change to the layout you specified for that contact in the Layout field.

For each type of contact, you can

- Show different fields
- Use different color backgrounds, labels, and fields
- Use different size field boxes or fonts
- Much, much more

Now you can clearly and graphically distinguish between prospects and clients, between business and personal contacts, and between any number of different types of contacts.

ACT! Layout Manager opens a whole new range of possibilities in the way you SEE your contacts in ACT! – automatically!

## Installation

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

This will install **c:\program files\tnhg\LayoutManager.exe** on your hard-drive, and add the LayoutManager.exe program as an ACT! custom command. It will


also put the LayoutManager icon  on the toolbar, and adds “LayoutManager” as an item on the Tools menu, of the Contacts View.

# Usage

## Database Specific Layouts

Start ACT! and open any database. Select the **Tools** menu. Select the **Design Layouts** option. Design or build the layout you want to associate with the open database. Select the **File** menu. Select the **Save As ...** option. Name the layout ***with the same name as the open database***. Close the Layout Designer. Repeat this process for each database that is to be associated with a layout. (It is a good idea to create a “generic” database layout for each database, even if you will be using Contact Specific layouts as described below.)

When the layouts with the same names as the databases have been created,

click the Layout Manager icon  on the Contact view toolbar, or select LayoutManager from the Contact view Tools menu. ***You need to restart LayoutManager whenever you restart ACT! Layout Manager will NOT start automatically each time you start ACT!*** Each time you start Layout Manager, the layout will change to the “database default layout” (the layout with the same name as the database). Each time you open a database for which there is a correspondingly named layout, that layout will be opened and used to display the contacts in that database.

## Contact Specific Layouts

For any database in which you would like to use different layouts for different contacts, open that database. Select the **Edit** menu. Select the **Define Fields** option. Click the **[Add Field]** button. Name the new field **Layout**. ***This step is extremely important!! Layout Manager looks at the contents of the Layout field to determine which layout to use for each contact. It ONLY looks in the field named “Layout”!*** You can make it easier to select the layout for each client by using the Dropdown List feature of ACT!, and adding the names of the various layouts you will use to the dropdown list.

Add the Layout field to the “database default layout”, or any other layout you can use with this database. On each contact record, set the Layout field to the name of the layout to be used for each contact.

Repeat the process outlined above to create the layouts with the names you used to populate the contact records’ Layout field.

When the layouts with the same names as the Layout field values have been created, click the Layout Manager icon  on the Contact view toolbar, or

select LayoutManager from the Contact view Tools menu. ***You need to restart LayoutManager whenever you restart ACT! Layout Manager will NOT start automatically each time you start ACT!***

Each time you start Layout Manager, the layout will change to the “database default layout” (the layout with the same name as the database) – if there is one. As long as ACT! is running (and you have not shut down Layout Manager), whenever you switch contacts (in a database with a Layout field) and whenever you open a new database (with an “associated” layout), Layout Manager will automatically switch the layout based on the Layout field value or the name of the database being opened.