

ACT!2000 RemoveFromGroup

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Installation and Usage

ACT!2000 RemoveFromGroup provides the capability to more easily remove all the contacts in the Current Lookup from any selected Group in an ACT!2000 database

With ACT!2000, facilities are available to quickly and easily add and remove individual contacts from a group (using the Contact View, Groups tab Group Membership window), and to quickly and easily add the contacts in the Current Lookup to a Group (using the Group View, Contacts Tab Group Membership window).


However, there is no facility built-in to ACT!2000 to quickly and easily remove all the contacts in the Current Lookup from a Group.

RemoveFromGroup provides a means to remove all the contacts in the Current Lookup from a Group in an ACT!2000 database.

Installation

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

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

command. It will also put the RemoveFromGroup icon  on the Contacts View toolbar and the Groups View toolbar. RemoveFromGroup is also added to the Contact menu in the Contact View, and to the Group Membership submenu of the Group menu in the Group View.

Adding Keyboard Command

If you would like to be able to use the a key combination to activate the RemoveFromGroup window (instead of clicking the RemoveFromGroup icon on the toolbar), you will need to do so manually.

Start ACT!2000, and activate the Contacts View. Select the **Tools** menu. Select the **Customize Contacts Window ...** option. Select the **Keyboard** tab. Change the **Categories** field to the “Custom Commands” option. Select **RemoveFromGroup** from the list of custom commands. Click the **Assign Shortcut** button. When the Assign Shortcut window opens, **hold down the key combination you want to use**, so that the Press new shortcut key: field shows that combination. Click **OK**. Click **OK** again to close the Customize Contact Windows dialog box. Repeat this process for the Groups View


Usage

The best performance is achieved by using the ACT! Group Selection button in the Contact View (at the right end of the lower border of the ACT! window, next to the Layout Selector button) to narrow the “scope” of contacts to only those contacts currently in the group from which you will be removing them. So, for example, if you want to remove contacts from the “Hot Western Prospects” group, start by clicking the Group Selector button, and selecting Hot Western Prospects from the PickList that appears. (You don’t have to do this – it just makes things more efficient and faster later in the process.)

Now use the ACT! Lookup menu (or any other means you choose) to narrow the lookup to just the contacts you want to remove from a group.

If you want to switch to the Group View and select the Group from which the contacts will be removed, you can do that now. If not, no problem – you can pick which group to remove the contacts from AFTER you have started RemoveFromGroup. However, when you start RemoveFromGroup, the “current” group is pre-selected from the list of groups, so this might save some time.

Now start RemoveFromGroup. If you are in the Contact View, you can click on

the RemoveFromGroup  icon on the toolbar, or you can select the Contact menu then select the RemoveFromGroup menu item. If you are in the Group View (with or without having selected the “target” group) you can click on the RemoveFromGroup icon on the toolbar, or you can select the Group menu, then

select the Group Membership submenu, then select the RemoveFromGroup menu item.

RemoveFromGroup shows you a scrolling PickList of the ACT! groups (in alphabetical order). If a group was pre-selected in the Group View, it is the default selection and is highlighted on the list. If no group was pre-selected, the first group on the list is the default selection. Click on any group name on the list to make that the group from which the contacts will be removed as members.

Select whether you want the list of contacts to be displayed with the Contact name first, followed by the Company name in brackets (useful if there are many contacts with no value in the company field) or with the Company name first, followed by the Contact name in brackets (useful if there are many contacts whose name you don't have recorded in ACT!). Whenever you change your selection for this option, RemoveFromGroup will rebuild the list of contacts displayed in the right-hand portion of the window.

If you would like to generate a detailed log of each contact-group-membership removal, check the "Log Details" option. Each time you run RemoveFromGroup, it adds to (or creates, if it doesn't already exist) the RemoveFromGroup.log file in the c:\program files\TNHG folder. If you have NOT chosen to log details, the log will show actions and counts only. If you HAVE chosen to log details, each contact's removal is recorded for you.

The list of contacts is for informational purposes only – you cannot modify the lookup's contents within RemoveFromGroup; you must return to the ACT! Contact View (use the [Cancel] button) if you want to add or remove contacts from the list of members to be removed from the selected group). Note that the list of contacts shows ONLY those contacts in the Current Lookup that are members of the Selected Group. If you change your Group selection, the list is rebuilt for you.

When the choices and options are what you want, click the [Remove] button to actually remove the memberships for the displayed contacts from the selected Group. You are given ONE chance to change your mind! Remember this operation cannot be undone, so be sure you want to continue before you approve the removal (or, better yet, backup your ACT! database before running RemoveFromGroup!)

A status display and progress bar show you how things are progressing during the removal process. If you cancel a removal process, all memberships already removed are gone – you are only canceling the rest of the removals.

After the removal completes, you can pick select another group from the PickList. RemoveFromGroup will re-build the list of contacts in the Current Lookup that are members of the newly selected group, and you can repeat the process.