

ACT! by Sage Remove From Group

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Installation and Usage

ACT! by Sage **Remove From Group** provides the capability to more easily remove all the contacts in the Current Lookup from any selected Group in an ACT! by Sage database

With ACT! by Sage, facilities are available to quickly and easily add and remove individual contacts from a group (using the Contact View, Groups/Companies tab “Add Contact to Group” window), and to quickly and easily add the contacts in the Current Lookup to a Group (using the Group View, Contacts Tab “Add/Remove Contacts” window “Contacts” option).

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

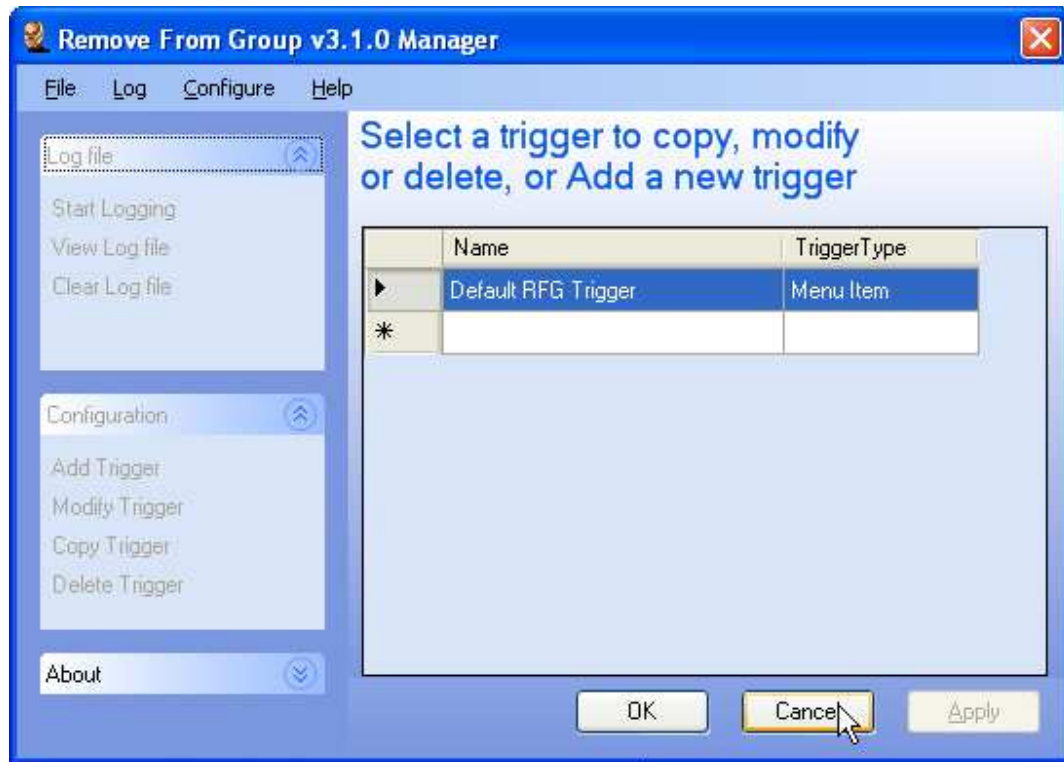
Remove From Group provides a means to remove all the contacts WITH STATIC GROUP MEMBERSHIP in the Current Lookup from a Group in an ACT! by Sage database. Contacts that are members of the group as a result of group membership rules must be removed by changing the field values that produce their membership.

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 the RemoveFromGroups.dll file into the \ACT\ACT for Windows\Plugins folder within the folder known to Windows as the default Program Files folder – usually “C:\Program Files”. **Remove From Group** is also added to the Contact menu. Enhancements to ACT! by Sage operate as “plugins” to the ACT! program, and are loaded along with ACT! when ACT! starts. Therefore, you won’t find Remove From Group on your Start > Programs menu – it operates as part of ACT! and has no individual identity.

In addition to the Contact menu “Remove From Group” option, the installation process also adds to the ACT! “Tools” menu, the “Remove From Group Manager” option. You can use this option to add additional “triggers” that will run the Remove From Group functionality, to start/stop the logging of events, viewing and clearing that log, and registering or learning about the product.

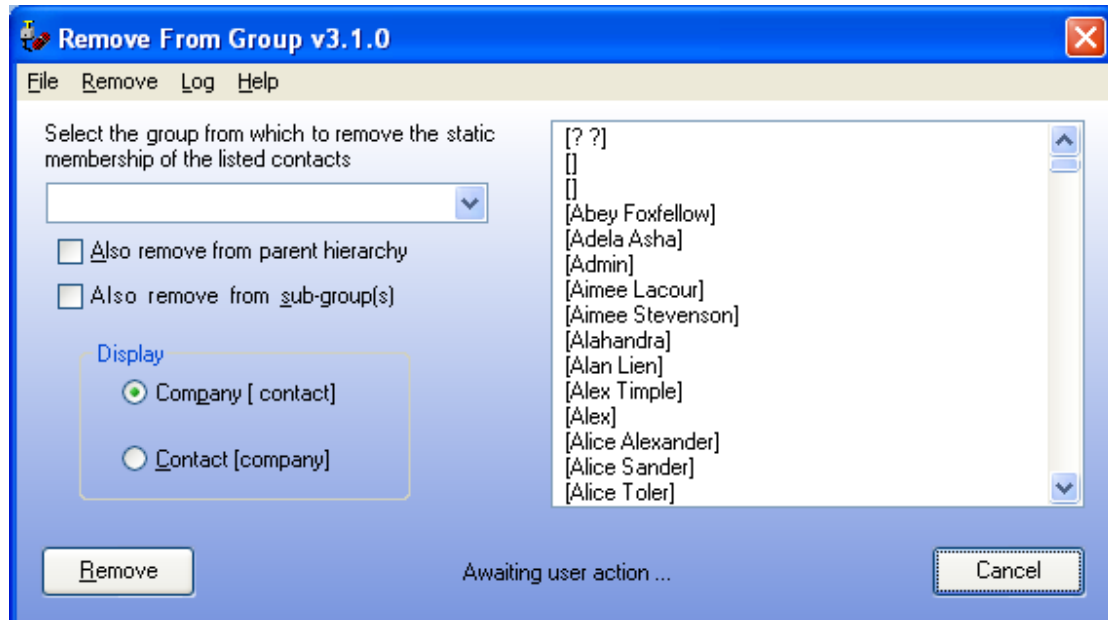


Usage

Use the ACT! Lookup menu (or any other means you choose) to create a lookup of 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 by selecting the “Remove From Group” option on the Contacts menu.



On the right hand side of the Remove From Group window, you'll see a list of the contacts in the current lookup. This is for reference purposes only – you can't refine the lookup once you've started Remove From Group. If the contents of the list of contacts is not what you want or expect, then [Cancel] out of Remove From Group and refine your lookup in ACT! proper.

You control whether list of contacts is 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, Remove From Group will rebuild the list of contacts displayed in the right-hand portion of the window.

On the left hand side of the window, Remove From Group shows you a scrolling drop down list of the ACT! groups (in alphabetical order). If a group was pre-selected in the Group View, it is the default selection and appears in the list's text area. If no group was pre-selected, the text area is clear, and no group is selected. Click the arrow at the right end of the text area to display the drop down list. Click on any group name on the list to make that the group from which the contacts will be removed as members.

You can also control whether you want to remove the contacts from groups of which your selected group is a sub-group – it's “parent” groups – using the “Also remove from parent hierarchy” check box, and/or from any sub-group that

belongs to the group you selected using the “Also remove from sub-group(s)” check box.

If you would like to generate a detailed log of each contact-group-membership removal, the use the Log menu, Start logging option to turn on the recording process. Each time you run Remove From Group, it adds to (or creates, if it doesn't already exist) the “Plugin.log” file in the “\Tnhg\RemoveFromGroup” folder within the user's “\Application Data”. 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. You can view the log using the Log menu, View Log option, which will show the contents of the log in a Notepad window. When you don't need it any longer, you can delete the log file using the Log menu, Clear log option. You can also save a copy of the log for later reference, or delete it manually, using Windows Explorer.

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 Remove From Group!)

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 select another group from the drop down list. Remove From Group 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.

Remember:

Remove From Group removes group STATIC MEMBRESHIP only. It does NOT remove the contacts themselves. And it does NOT remove any membership that results from group membership rules.