

Customizing Menus and Toolbars

Now that the fields have been designed and the layouts are arranged, let's make a few tweaks to the Menus and Toolbars. While changes to the database design and layouts are shared throughout the enterprise, modifications to the Menu and Toolbar are PC specific (you have to go through the same procedure on each PC).

There are three ways to executes a command that you create:

- ✓ You can add it to a menu.
- ✓ You can create a toolbar button.
- ✓ You can create a keyboard shortcut.

Procedure: To customize the toolbar or menu display

1. **T**ools, **C**ustomize, **M**enus and **T**oolbars...

Add a custom **Toolbar**.

Drag a menu **Command** to a different menu location or to the toolbar as an icon.

Toggle **Options** to display Full or Short menus, as well as Tootips.

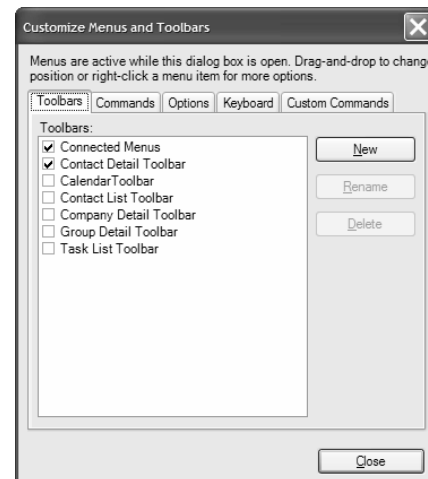
Assign a **Keyboard** shortcut key to any command.

Create a **Custom Command** to add to any Toolbar, Menu or Keyboard shortcut.

2. Click on the **Commands** tab to display the menu options.

While this dialog is displayed, you can move a menu command or right-click and Delete the command.

3. Close



From here you can drag any command from the **Commands:** area to a menu or toolbar location.

Adding an Object to the Menu/Toolbar/Keystroke

You can create commands that run other ACT! reports, document templates, and even other programs. All that is necessary is to specify the path to the report template, document template, or the program’s executable file. For example, if you frequently need to use the Windows calculator while you are working in ACT!, you can create a custom command that runs the program and adds it to the toolbar, the menu, or runs it with a keyboard shortcut.

Let’s do a quick exercise together to see how you might use this feature in ACT! Let’s say you print the same “Special Offer” Word Template multiple times every day. It would be great to be able to add that template directly to the Write menu or to the toolbar or to a keyboard shortcut. Well, you can.

Mini-Exercise: At Your Fingertips

Step	What to do	How to do it/Comments
1.	<p>Start the Customize Menus and Toolbars process.</p> <p>First identify the template as an ACT! command.</p> <p>Make both the Command name: and the Tooltip text: “Special Offer”.</p> <p>Browse to the \Template folder to find file named:</p> <p style="text-align: center;">Special Offer.adt</p>	<p><u>T</u>ools, <u>C</u>ustomize, <u>M</u>enus and <u>T</u>oolbars...</p> <p>Click the Custom Commands tab and click New</p> <p>Enter the Command name and the Tooltip text as indicated. Click the Browse... button, change the Files of type: to All files (*.*) then navigate to \My Documents\ACT\ACT for Win 7\Databases\CaptainsOI-database files\Templates folder and click on Special Offer.adt and click Open.</p>
2.	<p>Add the Command to the Custom Commands window.</p>	<p>Click Add Command.</p>
3.	<p>Add it to the toolbar.</p>	<p>Click the Commands tab. Select the Custom Commands from the Categories: column. The “Special Offer” should display in the Commands: column. Drag it to the toolbar and drop it where you want it to display.</p>
4.	<p>Add it to the menu.</p>	<p>Now drag the Special Offer command to the Write menu. When the Write menu displays, drag the icon to the location on the menu that you would like it to display.</p>

Step	What to do	How to do it/Comments
5.	Create a Keyboard shortcut for the template command.	Click on the Keyboard tab. Under Categories: scroll to and select Custom Commands. Select the “Special Offer” command and click the Assign Shortcut button. Press [Alt+S] to assign that keystroke to the template. Click OK . Click Close
6.	Test the three methods of generating the Special Offer template (Toolbar icon, Menu item and Keystroke)	Notice the Tooltip when pointing to the icon on the toolbar.



*If you have access to icon libraries or custom icons, you can also assign a custom icon to your command. Click the **Icon** button, locate and select the file that contains the desired icon, and choose the icon. When you assign this command to a toolbar button, it displays the icon you selected.*