



# Contact List Field Sets Manual

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## Product Manual

DesignR1 Software, LLC.

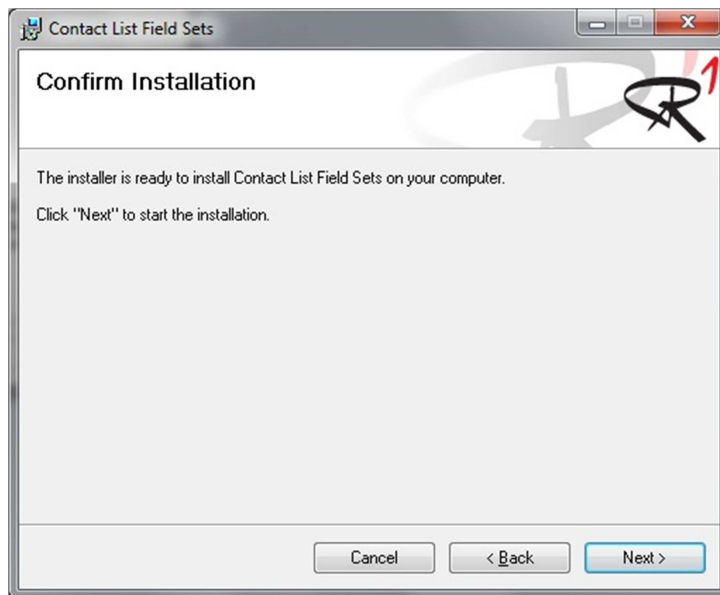


## Installation

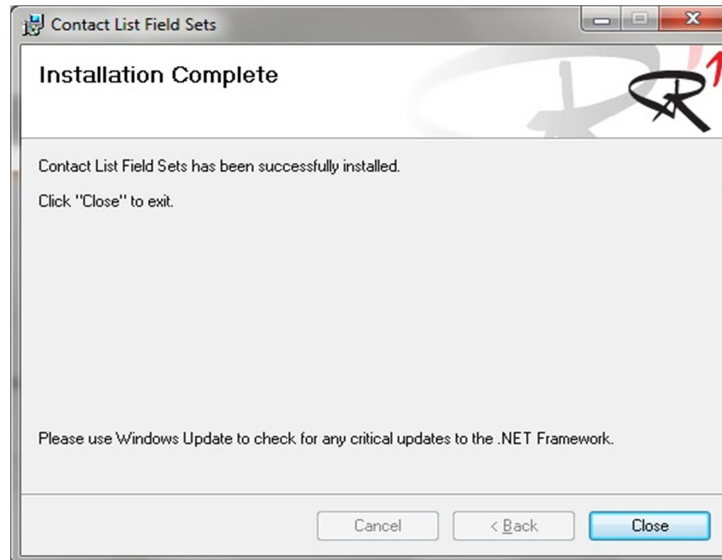
1. Download the plug-in at <http://www.designr1.com/downloads/ContactListFieldSetsSetup.msi>
2. Before installing, ensure you are logged in to Windows as a user with local administrative privileges. It is recommended you disable UAC in Windows before install. [Click here](#) for instructions on this subject.
3. Close ACT! and any Microsoft Office programs.
4. Run the installer



5. Press Next



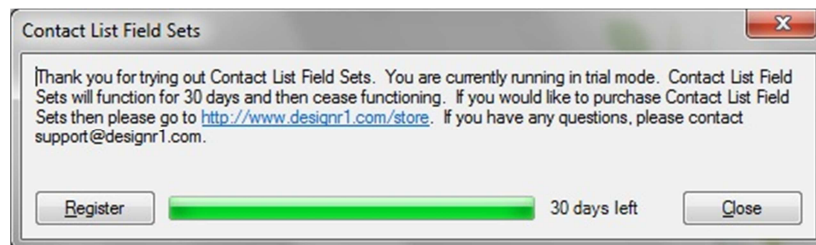
6. Press Next to install



7. Press Close
8. Installation is now complete

#### Registration

1. Start up ACT! By Sage
2. You will be greeted with a Registration screen for the plug-in
  - a. Note: The program starts as a 30 day free trial, if you press cancel button the registration window will close and you will continue to ACT! with the plug-in in trial mode



3. Press Register
4. Fill in the Serial and the rest of the registration information

Contact List Field Sets Registration

Serial:

First and Last Name:

Company:

Address:

City:

State and Zip:

Country:

Phone:

Email:

Consultant Pack Registration

Register

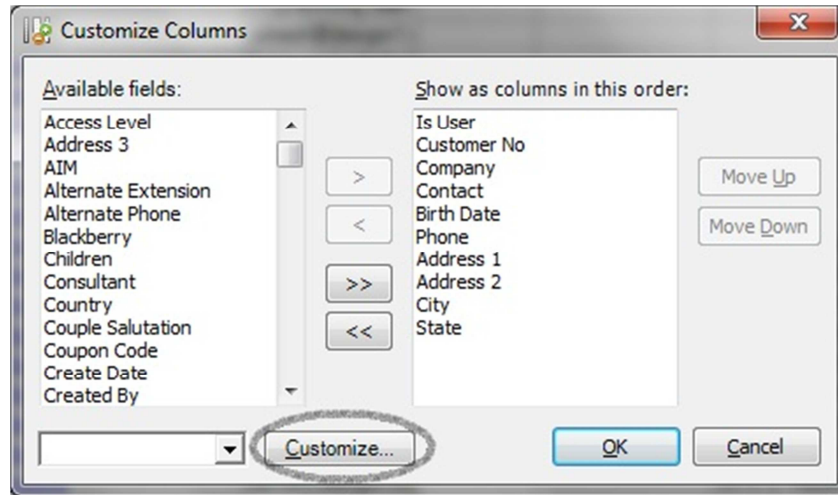
5. Press Register
  - a. Note: you must be online to register, it may take a few minutes while your computer contacts our server
6. Press Close
7. Registration is complete

#### Functionality

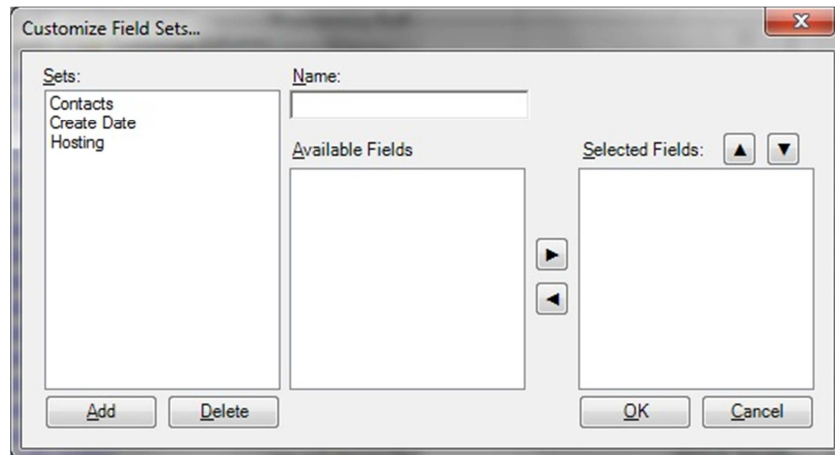
1. Navigate to contact list
2. Either view → Customize Columns...  
OR  
Right click on white part of contact list and select customize columns...

Add new column list

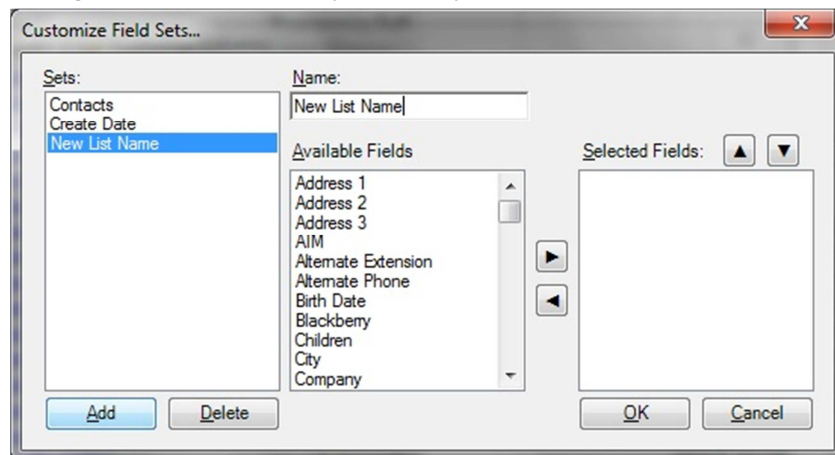
1. Once in customize columns dialogue



2. Click the "Customize..." button in the lower middle part of the dialogue box
3. Click the Add button in the lower right corner



4. Change the Name to what you'd like your list to be called.



5. Select the fields you want in the Available fields box



6. Press the right arrow to move your selected columns into your list.
7. You can change the order of the columns displayed on your list by selecting the column you wish to move and pressing the up or down arrow at the top of the selected field's box.
8. Press the "OK" button to exit the dialogue and save your list.
  - a. Note: once list is created you can edit it from the normal customize columns screen.

#### Remove column list

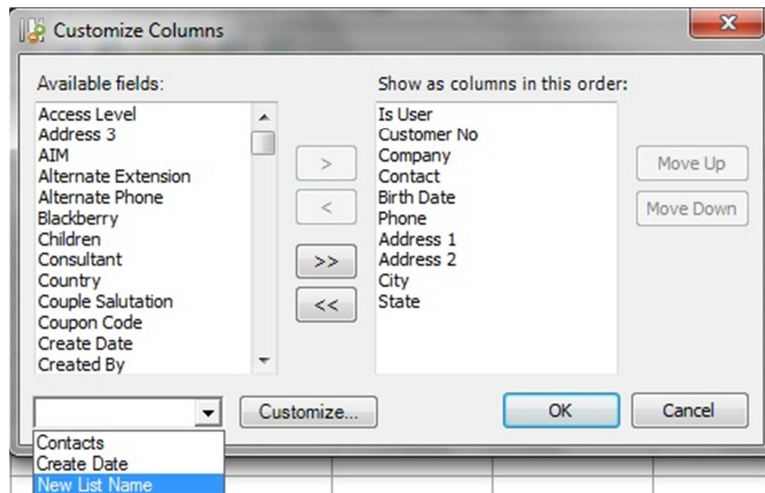
1. Once in dialogue
2. Click the "Customize..." button in the lower middle part of the dialogue box
3. Select the list you wish to delete
4. Press the "Delete" button
5. Press the "Ok" button

#### To select your desired contact list

1. Navigate to customize columns



2. In the bottom left of the dialog box, select the desired contact list from the drop down list.



3. Press ok, and the contact list will switch to the list you've chosen.

## Support

If you are experiencing problems please contact our support team at:  
[support@designr1.com](mailto:support@designr1.com)