CustomFill

v.3.1

Another efficient and affordable ACT! Add-On by

exponenciel

http://www.exponenciel.com

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Purpose of the add-on

CustomFill allows to number your ACT! contacts, do calculations with fields and constants, populate a field based on the value of another field, insert a date or time stamp, etc.

How it works

CustomFill is an always-on-top floating toolbar to which you can add up to 40 buttons that perform a calculation.

You can perform calculations by manually pressing the buttons on the CustomFill toolbar or can set up ACT! triggers to do this automatically without CustomFill needing to be running.

New in 3.0: you now can add up to 40 buttons (all databases included)!

Installation procedure

Download the program file from our download page and double-click it to start the installation. Follow the instructions and once the installation is completed, run ACT! and open your database.

An icon should have been added to your Contact toolbar to launch CustomFill directly from within ACT!. If the icon installation failed, you will have to instruct CustomFill to create it. Here is how to proceed:

While your database is open, click the Windows *Start* button, go under *Programs*, locate the *Exponenciel ACT! Add-Ons* group and click *CustomFill*.

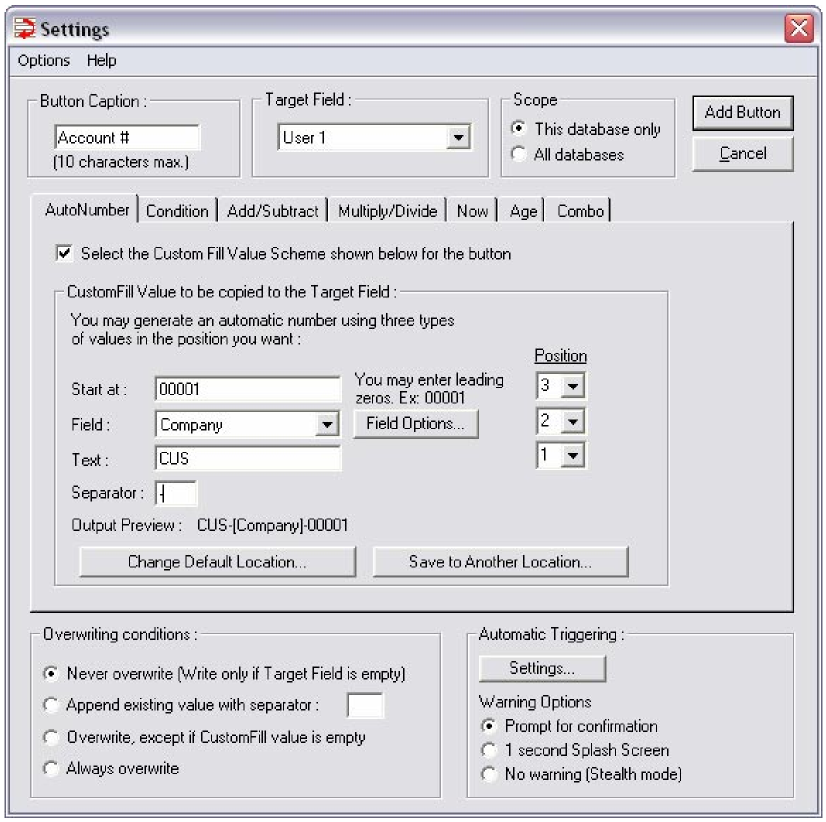
When you run CustomFill for the first time, the CustomFill bar looks like this:

Click on the *?* button to open the *Settings* window. Then go to the *Options* | *Integrate with ACT!* menu and add icons or menu items to your ACT! screens as needed. This way, you will be able to quickly launch the program from within ACT!. When prompted, accept that ACT! be re-started.

When ACT! re-starts, whatever icons or menu items you asked to be created will be there to launch CustomFill.

Creating buttons

Run *CustomFill* and click the *New* button to open the *Settings* window .



You may create a number of different buttons based on different schemes.
The first step is to type a caption for your button and to select a target field. The target field is the field the calculated value will be copied to. When this is done, you need to select a scheme.

AutoNumber Scheme

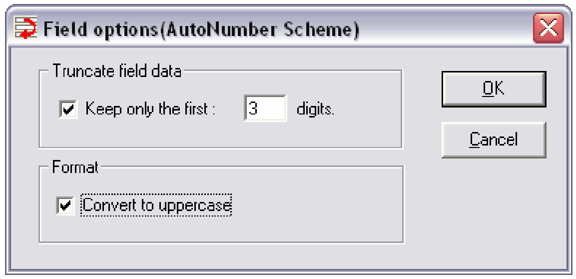
An autonumber button will generate an autonumber (for instance, an account number) composed of three different "sections":

- a number that will be incremented automatically,
- a field of your database (or rather the value contained by this field in the contact record the autonumber will be created for),
- a static text of you choice.

All sections are optional except the incremental number. You may choose the order in which the sections appear using the position dropdown boxes to the right of each field. You have the option of adding a separator in between sections.

For instance, the above screen shows how to create an account number structured like this: CUS-Company_Name-00001. If you'd run the button a second time, the target field value would be CUS-Company_Name-00002 and so on.

Note the *Field Options*… button next to the *Field* field. If you click this button, you open the *Field Options* window.



These additional options allow you to only keep the first X characters of the field value (in the preceeding example it would be the company name) as well as convert all characters to uppercase.

New in 3.0: Spaces, punctuation and special characters like ,'/\; etc. are now ignored when using the *Field Options*. So if the company name is "Ch Gourmet", the above settings would give: CHG.

Sharing an incremented number over a network

New in 3.0: You may now share the file where the number to be incremented is stored. This way, people working on a network will increment the same value even when they run CustomFill from different workstations.

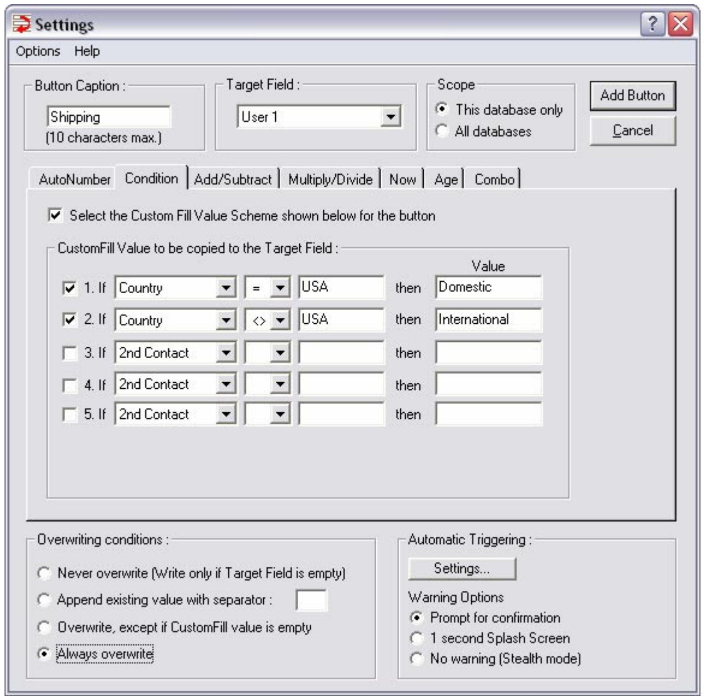
Use the *Change Default Location* button to select a file number (with the .num extension) anywhere on your network.

Use the *Save to Another Location* button to save your current file number anywhere on the network so that other users can use it.

NOTE: *The path to this .num file is part of the button settings. If you share your button settings with other workstations, make sure that the location you choose can be accessed from all workstations using the same path. If the .num file is on network drive S for one workstation but this same drive is named T for another workstation, it won't work.*

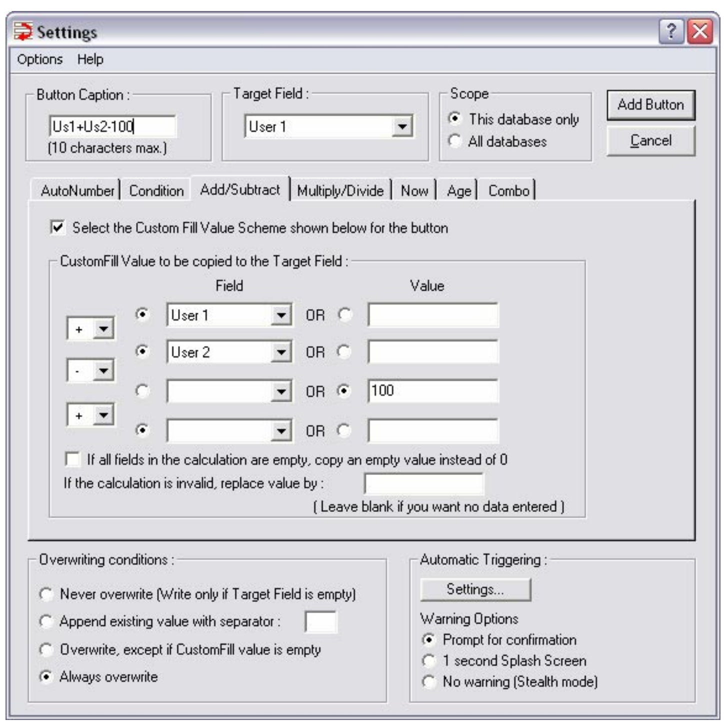
Condition scheme

The condition scheme will copy a value in the target field based on another field value.



Add/Subtract scheme

The Add/Substract scheme allows to add and subtract fields or a combination of field and values.



You may use this scheme to concatenate non numeric field. To insert a space, between 2 fields for example, use the pipe sign. The pipe sign is ignored by CustomFill when making concatenations: for instance: User1 + | | + User2 (where the 2 pipe signs are separated by a space) will return "Mr Huffman" if User1 is set "Mr" and User2 "Huffman".

Multiply/Divide scheme

The Multiply/Divide scheme allows to multiply and divide fields or a combination of fields and values. It could be used to calculate taxes on a product for instance.

Now scheme

The Now scheme allows to insert today's date (timestamp) or today's date plus or minus a number of days. It can copy the date only, the date and time or the time only. For instance, it can be used to calculate a contract expiry date like today's date + 183 days for a 6 months contract.

Age scheme

The Age scheme allows to calculate the number of years, days or years and months between today and a date contained in a field. It can be used for instance to calculate the number of days between today and a contract expiry date.

Combo scheme

The combo scheme allows to combine up to 8 buttons into one, making it easy to run multiple buttons at once.

Other settings

- Scope of the button

  Each button may be limited to use in the database it was created in or may be made available to all of your databases. Be aware though that a button may involve a field that is not present in all databases.

- Overwriting conditions

  Considering the target field may not be empty, you have 4 overwriting conditions to choose from
  - Never overwrite will leave the current value intact if there is one
  - Append with or without a separator will add the value to the end of the current value if any.
  - Overwrite except if the value to be copied is empty
  - Always overwrite

- Automatic triggering

As mentioned before, you can set up ACT! triggers to automatically run a button. When in automatic mode, you can have CustomFill update your field without warning (Stealth mode). But you may also want CustomFill to prompt you before any change is made. Finally you have the option to display a brief splash screen, just so that you know changes are being made.

When you are done creating your button, click *Apply* in the *Settings* window and the button will be added to your CustomFill bar. Here we just created an Account # button.

Running a button

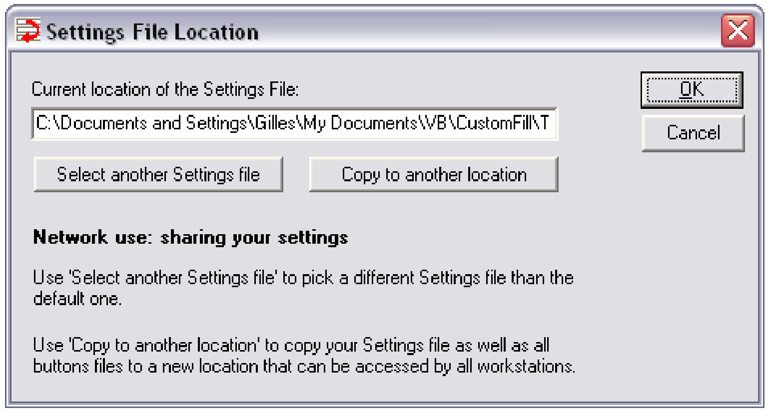
You may click a button at any time. When you do you'll be prompted to choose which contacts the changes are going to be applied to:

Deleting a button

To delete a button, simply right-click on the button you want to delete and select *Delete* in the pop-up menu.

Sharing your settings over a network (new in v. 3.0)

By default, your settings are saved in a file named *customfill.ini* located in your CustomFill folder. If multiple workstations are set to work with CustomFill, starting with v. 3.0, you can easily share the settings file, so that you don't have to duplicate the buttons on each workstation. Simply go to the *Options | Settings file location* menu and locate the file you want to use as a settings file.



This way all workstations have the same buttons and any change made from one workstation will be available to the other workstations (Note that if a workstation creates a new button, the new button will only be visible to other workstations the next time they start CustomFill).

Setting up triggers to automatically run CustomFill buttons

ACT! allows to set up triggers that run a program when entering or leaving a field. To set up a trigger, go to ACT! *Edit* | *Define fields* menu, select the field of your choice and go under the *Triggers* tab. Then select the file you want to launch automatically either when entering or exiting the field.

If you want to run a button as an entry or exit trigger, right-click on the button you want to run automatically and choose *Trigger syntax*. Copy the syntax to the clipboard and paste it in the appropriate trigger field.

Note: *you need to close CustomFill before entering the Define Field window because ACT! locks the database when you do. When CustomFill is running, ACT! can't lock the database.*

A typical trigger syntax is:
C:\Program Files\Exponenciel\CustomFill\CustomFillAuto.exe ~100

~100 is the ID of the button to be run.

Running multiple buttons automatically

If you want to run multiple buttons, find the IDs of all the buttons by checking their trigger syntax, then set up the trigger as shown before and add the other IDs to the end of the line, separated with commas, as in:
C:\Program Files\Exponenciel\CustomFill\CustomFillAuto.exe ~100,~101,~102

Note: *Make sure you leave no spaces in-between button IDs or ACT! will return an invalid path error. (The spaces in the path of the program are accepted by ACT but not in the arguments that follow the path).*

Once done, CustomFill will run the button(s) automatically when you enter or exit the fields with triggers.

Note: *CustomFill does not need to be running for the trigger to work. But each user that may run a trigger needs to be registered.*

A typical use would be:

The User1 field holds the price for a sold item;
User2 field is for the tax (5% of User1);
User3 is the total (User1 + User2);
You created a button to calculate the tax in User2 and a button to calculate the total in User3;
You could set up a trigger that will run the 2 buttons when exiting User1 so that both User2 and User3 are automatically updated when User1 is updated.

Note: *when CustomFill is run as a trigger, changes are automatically limited to the Current contact. You don't have the option to select Current lookup or All contacts like when you manually click the button.*

System Tray options

Through the *Options* | *System* tray menu, you have the options to always start CustomFill minimized in the System tray or to have it minimized to the System tray when you hit the close (X) button of the CustomFill floating bar. To close CustomFill when minimized, do a right-click on the icon in the system tray and choose *Close*.

Adding an icon or a menu item to ACT! to launch CustomFill

As with any of our add-ons, go to the *Options* | *Integrate with ACT!* menu to display this window and add icons or menu items as needed. Menu items are added to the *Tools* menu.

Animated tutorials – Online help

The *Help* menu gives you access to our *Online Help* where you will find a number of animated tutorials showing how to set up buttons, etc.

Registering CustomFill

You may buy licenses from Exponenciel. Registration is based on ACT! user names, so youwill have to supply your ACT! username when registering. Once given a registration code, go to the *Help* | *About* menu and type the registration code in the box below your username.

Support

For support, please contact support@exponenciel.com.