Automatic Member Synchronization

v.5.0

for ACT! 2006

Another efficient and affordable ACT! Add-On by

exponenciel

http://www.exponenciel.com

Table of content

Purpose of the add-on

Automatic Member Synchronization is designed to automatically propagate changes to members of a company, members of a group, divisions of a company or subgroups of a group when the parent company or group is changed. For instance, with this add-on, you can create a relationship between a company field and a contact field so that every time the company field is modified, the associated contact field is automatically updated for all contacts belonging to this company.

Installation procedure

Download the program file from our http://www.exponenciel.com and double-click it to start the installation.

Note that contrarily to versions supporting previous ACT! versions and because of the changes in ACT!, add-ons are now DLL files and not executable files. This means that they are automatically initialized by ACT! when placed in ACT! plugin folder (a subfolder of the main ACT! directory) and cannot be started from the Windows Start menu anymore. This is why you are not given a choice of installation directory during the installation process.

How it works

There are 4 possible scenarios for member synchronization:

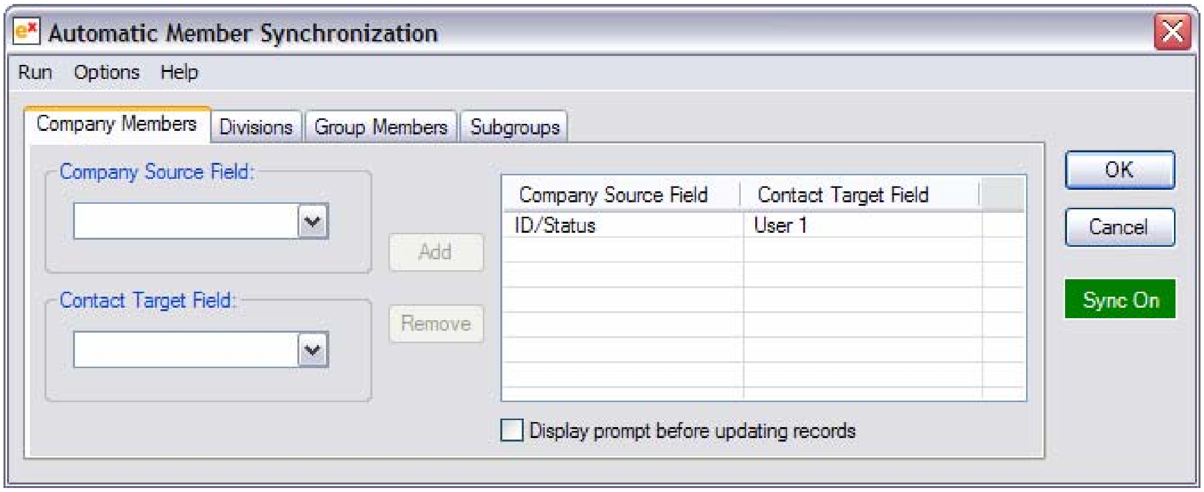
- You want to synchronize a company with its contacts
- You want to synchronize a company with its divisions
- You want to synchronize a group with its contacts
- You want to synchronize a group with its subgroups

All you need to do is create a link between a source field of the parent record (company or group) and a target field (contact, division or subgroup). The add-on will then monitor the changes to the source field and modify the target fields.

Creating links between a parent record and its members

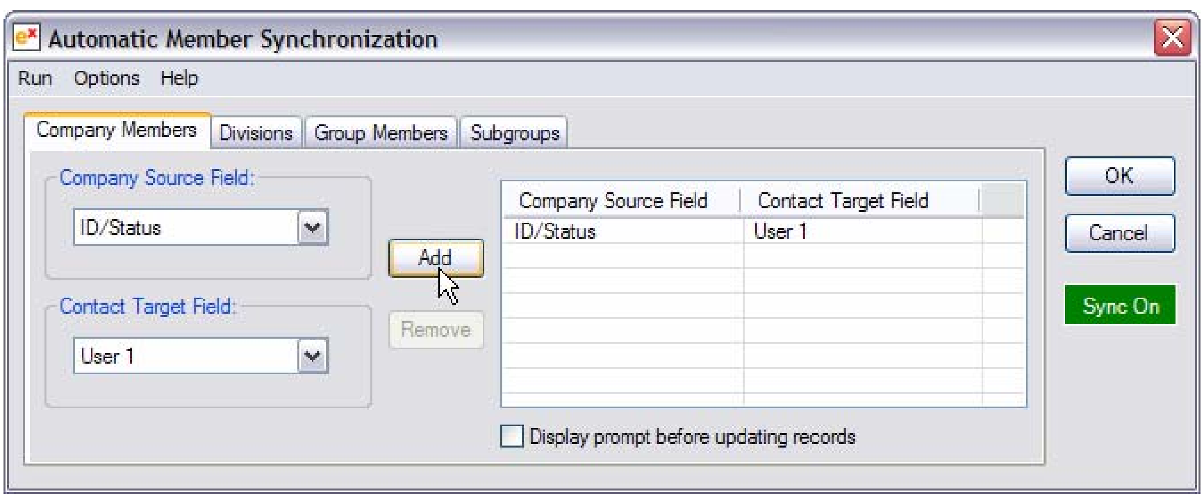
The setup is very simple. You run the add-on from ACT! Tools menu. *Tools* > *Automatic Member Synchronization*.

The main window appears:



Each type of synchronization has its tab. For instance, if you want to sync a company with its contact members, you choose the tab called *Company Members*.

Then select a source field and a target field, click Add and that's it.



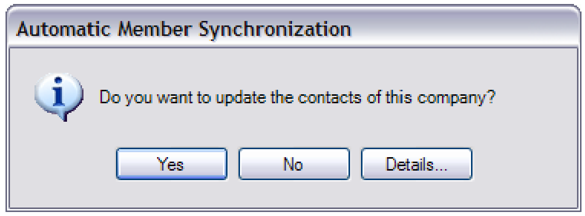
In this case, we have associated the company ID/Status field with the User1 contact field.
So whenever the ID/Status field will be modified, the change will be reflected in the User1 field.

You may have as many links as you want. A source field may be used more than once. If you use a target field more than once, it will be overwritten with the latest link.

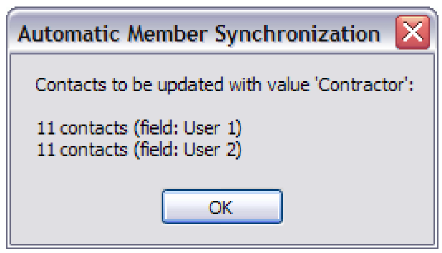
That's it. There is nothing else to setup. Click OK and the add-on will start monitoring your company and group records. Everything is automatic.

Displaying a prompt

If you want the add-on to prompt you for confirmation before any changes are made, check the Display prompt before updating records checkbox. Note that each tab, ie. sync scenario, has its own prompt settings.



When the prompt appears, you may want to click the Details… button to see what changes are to be done.



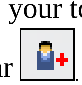
Progress Bar

When the add-on updates records, a popup window with a progress bar will appear so that you are aware that the update is taking place. This is useful if there are lots of record to update. If there are only a few, the update will be so fast that you will barely see the progress bar.

Turning synchronization off

If you want to turn the synchronization off, press the Sync On button. It will then turn to red and indicate Sync Off. To turn it back on, click Turn Off.

Creating a company from a contact or a contact from a company (NEW in 5.1.1)

Automatic Member Synchronization adds 2 icons to your toolbars. One icon to your Contact Detail toolbar , and one to your Company Detail toolbar .

Clicking the first icon will create a company based on the current contact. You will obtain the same result as if you had gone to *Groups* > *Companies* > *Create Company from Contact*, except that all the values of the contact fields that you associated with company fields under the Company Members tab of Automatic Member Synchronization will be automatically copied to the new company record.

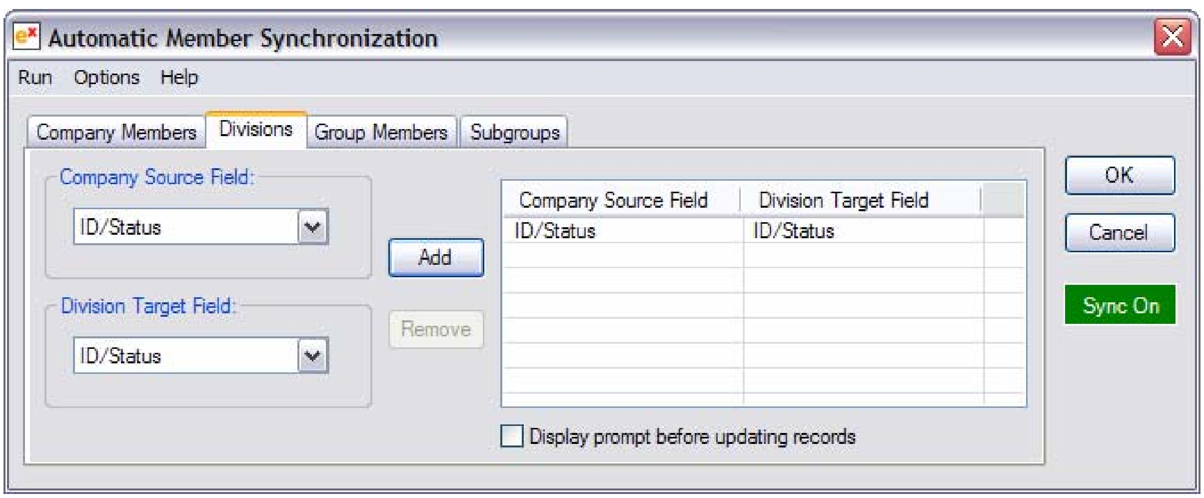
Clicking the second icon will create a contact based on the current company. You will obtain the same result as if you had gone to Groups > Companies > Create Contact from Company, except that all the values of the company fields that you associated with contact fields under the Company Members tab of Automatic Member Synchronization will be automatically copied to the new contact record.

Managing your links carefully

When Automatic Member Synchronization updates the records, it first updates the divisions then the contacts if you made changes to a company record, the subgroups then the contacts if you made changes to a group record.

Depending on the links you created, the add-on may end up updating several levels of records. Let's take an example.

If you create a Division link ID/Status - ID/Status, when you change the ID/Status field of a company, it will automatically update the ID/Status of its divisions. Then if these divisions have divisions, it will propagate the changes to them also and so on. That's because a division is also a company, so the add-on will detect that the ID/Status of the divisions has been modified and will therefore update their divisions.



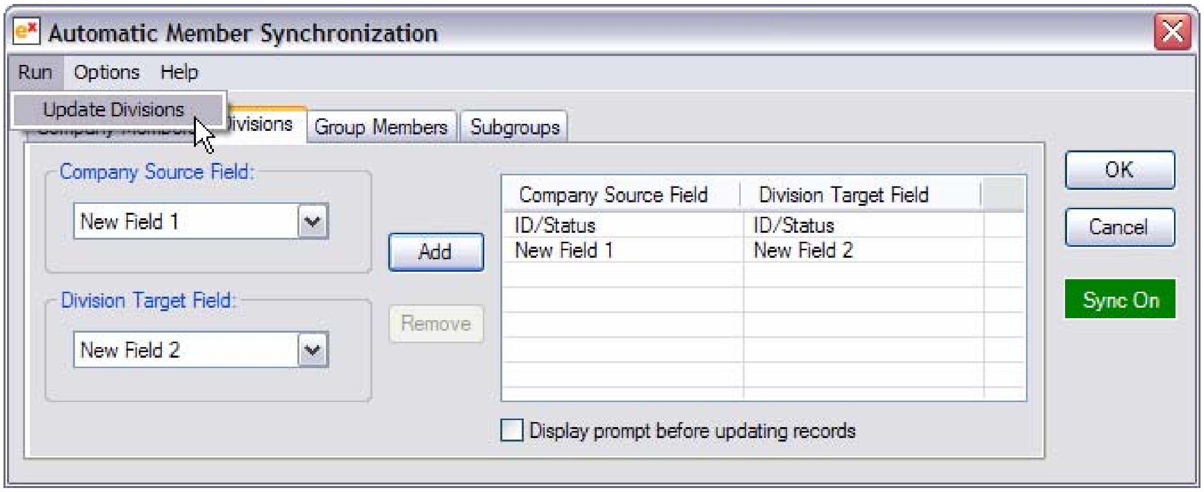
If you don't want the changes to be propagated all the way along the company or group tree rather be limited to the next level, then make sure you never use the same source and target field.

If on top of this, you create a Company Members link between ID/Status and User1 as shown before, all the contacts of all companies below the current company will be updated. This is a very powerful way to quickly update all contacts belonging to a company and its division.

Manually initializing all members before using AMS

Particularly before you start using Automatic Member Synchronization, it might be useful to update your members so that the target fields match the source fields, in other words to initialize your members so that they are up-to-date before AMS takes over.

To do this, **select the tab corresponding to the type of records you want to initialize** then go to the *Run* menu and select *Update Company Members* or *Update Division*, etc. depending on the selected tab (NOTE: you need to be in the Company Detail view for the company related menu item to be enabled, Group Detail view for the group related menu item to be enabled.)



When prompted, select *All records*.

All records will be updated using the links displayed under the tab. So you may update all contacts belonging to groups, all contacts belonging to companies, all divisions and all subgroups. Each update will have to be launched individually by first selecting the corresponding tab.

In the example shown above, all divisions ID/Status fields will be updated with the ID/Status of their parent company and all New Field 2 fields will be updated with the New Field 1 field of their parent company.

NOTE: *If you are planning on updating all contacts belonging to groups and all subgroups, it might be wise to run the update for the subgroups first, as the values which will be copied to the subgroups may need to be propagated to the contacts of these subgroups.*

NOTE: *If a contact record is member of more than 1 group or more than 1 company, its target fields will be written more than once and only the last value will remain. It is not possible to predict which value will be written last.*

Manually updating the members of one company or one group

To manually update one company or group members, make this company or group active, then launch Automatic Member Synchronization. Select the tab corresponding to the type of records you want to update then do *Run* > *Update* (Company Members, Divisions, Group members, Subgroup). When promptes, select *Current record*. The current record's members will be updated using the links displayed under the tab.

Sharing your settings over a network

If you have multiple users, you might want to share your settings file between all users. Simply move the content of the Data folder (by default at C:\Program Files\ACT\ACT for Windows\Plugins\Exponenciel\Automatic Member Synchronization to a location accessible to all users and change the preferences (*Options* > *Preferences*) to reflect this change.

Registering your product

To continue using this product passed the trial period, please buy a license at www.exponenciel.com. Licenses are issued for one ACT! username and will only work for that username.

Once you get a license code, Once the *About* screen is open, type the registration code in the appropriate box and click OK. You might need to close and restart ACT! to complete the registration process.

Support

For support, contact support@exponenciel.com.

Rev. January 18, 2005 – v. 5.1.1