Another efficient and affordable ACT! Add-On by



Automatic Data Entry from Table

v.6.0

for ACT! 2008 and up

http://www.exponenciel.com

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Purpose of the add-on

Automatic Data Entry from Table is an add-on that allows you to automatically fill multiple fields based on the value contain in a reference field. The values used to automatically fill the "target" fields are contained in a table.

Installation procedure

Download the program file from our <u>download page</u> and double-click it to start the installation.

Note: 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

Here is an example. You have a field called Territory and three other fields (Outside Sales Rep, Inside Sales Rep and Time zone) which values are directly tied to the Territory field. The idea of the add-on is to have you create a table with all the possible values for the Territory field and for the other 3 fields and thereafter have the add-on pick the values from this table to automatically update the 3 fields whenever the Territory field is updated.

You just create a table like the one shown above where the first column contains the reference values. The other columns contain the values you want copied to the other fields.

The Territory field is the Reference field. The 3 other fields are the Target fields.

Once the add-on is properly setup, every time a user changes the value of the Territory field, Automatic Data Entry will detect the change, evaluate the value of the Territory field and if it matches the new value with one of the values in the first column (the match is not case-sensitive), it will automatically update the target fields.

Creating a scheme

The first step is to create a scheme. For this, click the button on your toolbar that was added by the installation process.

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						Automatic Data Entry -	Table

In the main window of the program, click the Add... button to start the creation wizard.

📕 Automatic Data Entry - Table		×
Options Help		
Available Schemes:	Add) Edit Delete	Close

In the first screen of the wizard, you need to select the reference field and the target fields.

🖉 Calculation Series Wizard	X									
Reference and Target Fields Choose the field which values will serve as reference (the Reference field) and the fields that will be automatically updated based when the reference field value changes.										
Reference field:	~									
Target fields: Available fields: Address 1 Address 2 Address 3 Atemate Extension Altemate Phone Birth Date Check 1 Check 2 City Company Contact Country	Selected fields: Outside Sales Rep Time zone									
< Previous	lext > Cancel									

NOTE: You can add up to 20 target fields.

Click Next, to get to the table view.

able:				
Territory	Outside Sales Rep	Inside Sales Rep	Time zone	
				Add
				Delete
				Delete
				Import

To add a row, simply click the Add... button and type the values in the Data Input window.

📕 Data input		\sim
Reference Value: Territory	Chicago	OK Cancel
Target Fields: Outside Sales Rep Inside Sales Rep Time zone	Bob Johnson Bemie Nichols Central	

NOTE: The reference field value is not case-sensitive.

Once you are done entering data, click Save to save your scheme.

Identical Reference Values

In case you enter a reference value more than once, the user will be prompted to choose from the different target fields value sets.

For instance, let's say you enter twice New York as territory with different target field values.

e otł the t	e:	get fields and should cor en the reference field co	ntain the values you wa ntains the reference valu	nt copied Je.	
	Territory	Outside Sales Rep	Inside Sales Rep	Time zone	1
íÖ	hicago	Bob Johnson	Bemie Nichols	Central	Add
Ē	os Angeles	Lucy Wynn	Chris Mackay	Pacific	
N	lew York	Jack Stew	Lilian Cartwright	Eastern	Edit
N	lew York	Emie Wells	Blanca Mendez	Eastern	
					Delete
					00000
-					
-					
					Import
					Import

When the territory value is changed to New York, the following prompt will appear to the user:

🔚 Au	tomatic Da	ta Entry - Tab	le	
(The	e reference v Please select	alue is associated the proper set:	with more than one set of target field values.	ОК
	Jack Stew	Lilian Cartwright	Eastern	
	Emie weils	bianca Mendez	Eastern	

The user will have to double-click the entry of its choice or select it and click OK.

Activating/Deactivating a scheme

By default a new scheme is automatically activated, which means that once you exit Automatic Data Entry – Table, the program will start monitoring any change in the reference field. But whenever you want to de-activate a scheme, simply uncheck it in the main window.

📕 Automati	c Data Entry - Table 🛛 🛛 🔀
Options Help	chemes: Ory Add Edit Delete activate - Uncheck to deactivate

Checked schemes are activated. Uncheck schemes are de-activated.

Sharing your settings over a network

By default, the data is saved in an settings file by the name of your database with an .ini extension located at C:\Program Files\ACT\Act for Windows\Plugins\Exponenciel\Automatic Data Entry – Table.

If you have multiple users on a network, you may want to share the schemes among all users so that you do not have to recreate them on each machine. To share the settings with all users, go to the *Options > Preferences* menu and select a folder accessible to all users under *Data Folder*. If you already have created schemes, look for the settings file at the default location and move it to the folder you just selected.

Then adjust the data folder location on all machines so that everyone looks at the same settings file.

Sharing your settings in a synchronization environment

If you are installing to a computer that does not directly access the main database but rather a satellite database that you synchronize to the main database, you may want to place the data folder inside a folder that gets synchronized and reference that folder on the synchronized machine under *Options* > *Preferences* as described above.

But it is not enough because the file that contains the settings for a database is called by the name of this database. Since a satellite database can not have the same name as the master database, to prevent the sunchronized user to have to rename the file everytime, we need to instruct Automatic Data Entry to look for the file of the master database and not of the satellite database. This is done through the Options > Synchronization Environment... menu.

Synchronization environment	
Master database: If you are using the data file from a master database with a different name, enter its name below (ex: ACT8demo): MasterDB	OK Cancel

Simply type the name of the master database (without the extension) and from now on, Automatic Data Entry will read the master database settings file.

Importing Data from Excel (or a comma-delimited file)

Instead of entering data through the Dat Input window in the last screen of the wizard, you can also create our table in Excel, save it as a CSV file then import it.

	Microsoft [Excel	- Book1									
	<u>File</u> <u>E</u> dit	View	Insert	F <u>o</u> rmat	Tools	<u>D</u> ata <u>W</u> ir	ndow A	CT! <u>H</u> elp	Ado <u>b</u> e PD	F		
D	🛩 🔛 🐔	6	🗟 💞	X 🖻	B •	🛷 🗠 •	CH + 📢	Σ -		100%	• 🛛 🗸	Arial
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	C5	•	fx.									
	A		В			С		D	E	F	G	Н
1	Chicago		Bob Johns	son	Bernie	Nichols	Centr	al		1		
2	Los Angele	s	Lucy Wyr	n	Chris	Mackay	Pacif	ic			1	
3	New York		Jack Stev	V	Lilian	Cartwright	Easte	ern				_
4			and the second sec	_								
5		Save	As									<u> </u>
7			Save in:	A	utomati	c Data Entry -	Table	- 4	• • E 🔇	XM	Tools -	
8		F		-								
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11		1	History									
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16												
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10		1	Desktop									
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21			*									
22		F	avorites									
23												
24				-							_	
25		Mu	Network	File nar	ne:	data.csv				1	- L	Save
26		ivity	Places	Save a	s type:	CSV (Comma	delimited) (*.csv)		010	-	Cancel
27		1	waster -		Section 1	1 Contraction						/

Below is an example. Make sure the columns are in the same order than in the Wizard window. Then remove anything that is not part of the data (like column titles) before saving to a CSV file.

Don't forget to close the file in Excel before trying to import it.

Then in the second window of the wizard, click Import.

Outside Sales Rep	Inside Sales Rep	Time zone	11
		and an inclusion of the local state of the local state.	
			Add
			Edit
			Dele
			Limp
			Image: second

In the Open window, select the CSV file and click Open. The data is imported:

Table:					
Territory	Outside Sales Rep	Inside Sales Rep	Time zone		
Chicago	Bob Johnson	Bernie Nichols	Central	Add	
Los Angeles	Lucy Wynn	Chris Mackay	Pacific		
New York	Jack Stew	Lilian Cartwright	Eastem	Edit	
-				Dele	
				Dele	
-				-	
				Impo	
-					

Note on checkboxes (Yes/No fields)

When reading or writing the value of a checkbox (Yes/No field), use True and False and not Yes and No.

Registering your product

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

Once you get a license code, either click the Register now button of the nag screen or go to the *Help* > *About* menu and once the *About* window opens, 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.

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