

AutoFill Editor™ by ASDS Computer

User's Guide

Welcome to AutoFillEditor

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WELCOME TO AutoFillEditor

This user's guide was designed to help you become familiar with the features and functions of AutoFillEditor. AutoFillEditor is the powerful software that automatically populates field data in ACT! 2005/2006 based on criteria you set. Eliminate tedious and repetitive data entry and save valuable time with AutoFillEditor from ASDS Computer.

SYSTEM REQUIREMENTS

Computer with a Pentium III or better processor

Microsoft Windows 2000, XP or 2003

ACT! 2005/2006 Standard or Premium on the same PC network workstation or network server



10343 Federal Blvd., PMB J404, Denver, CO 80260

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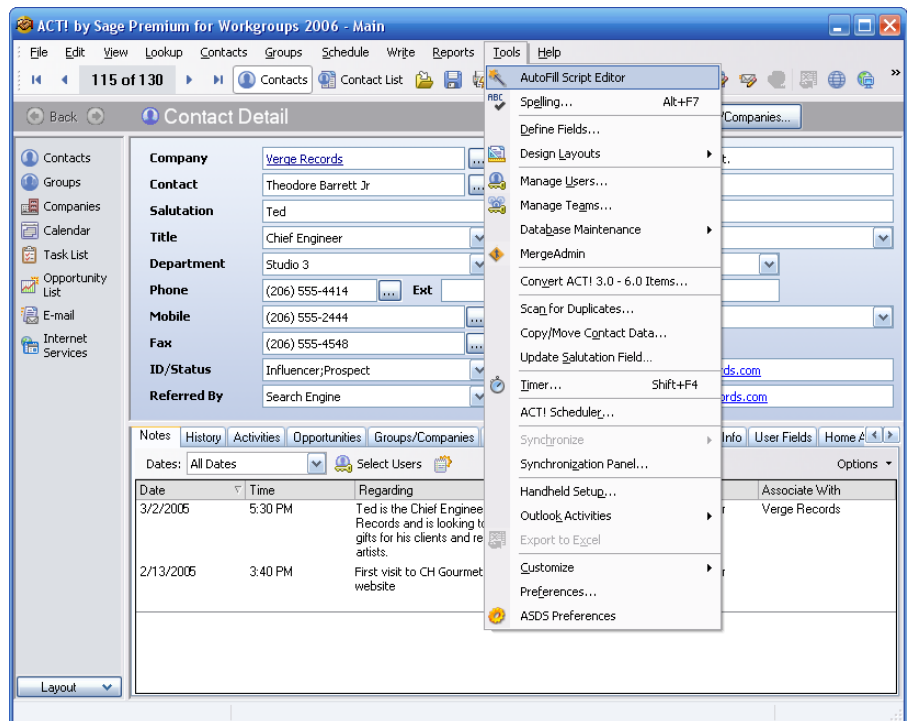
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AutoFillEditor

About AutoFillEditor

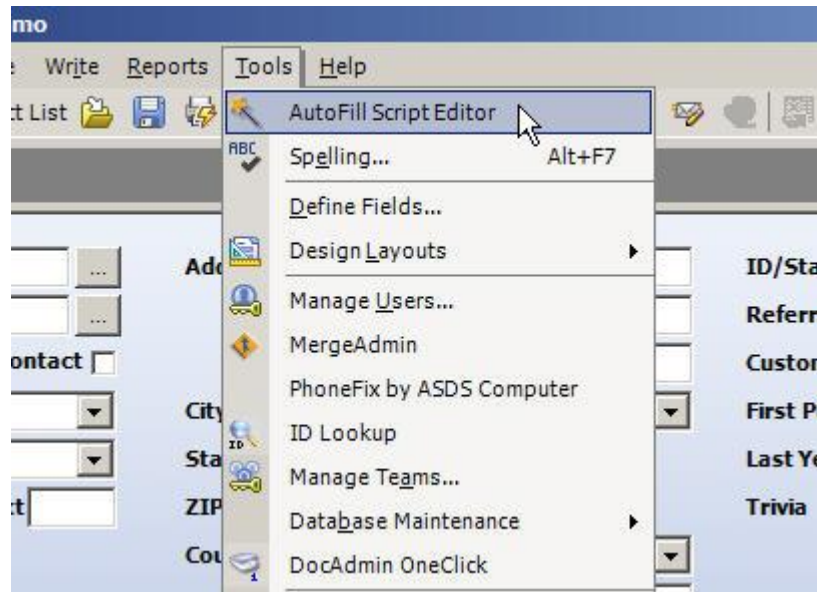
AutoFillEditor from ASDS Computer is the easy way to automatically populate ACT! 2005/2006 fields based on criteria you set. Eliminate tedious data entry and save valuable time. Simply choose your 'trigger' field (like Zip Code), enter a value, and then choose your 'target' fields to fill (like City and State) with the values you specify.

AutoFillEditor is not a standalone application and can only be started from within ACT!. Once installed, AutoFillEditor can be launched by clicking on the Tools menu in ACT! and choosing the AutoFill Script Editor menu item as shown below in Figure 1-1.



Creating AutoFill Scripts

The first step in using AutoFill is to create the desired script. To accomplish this, you open the AutoFill Script Editor from the TOOLS menu in ACT!. See the example below:



Once you have the script editor open, you will have the ability to create scripts based on fields in ACT!. See the additional help topics for steps to creating a script.

Loading the AutoFill Script Editor

The first step in creating your AutoFill script is to go to the **TOOLS** menu and choose the **AutoFill Script Editor**. See the example above.

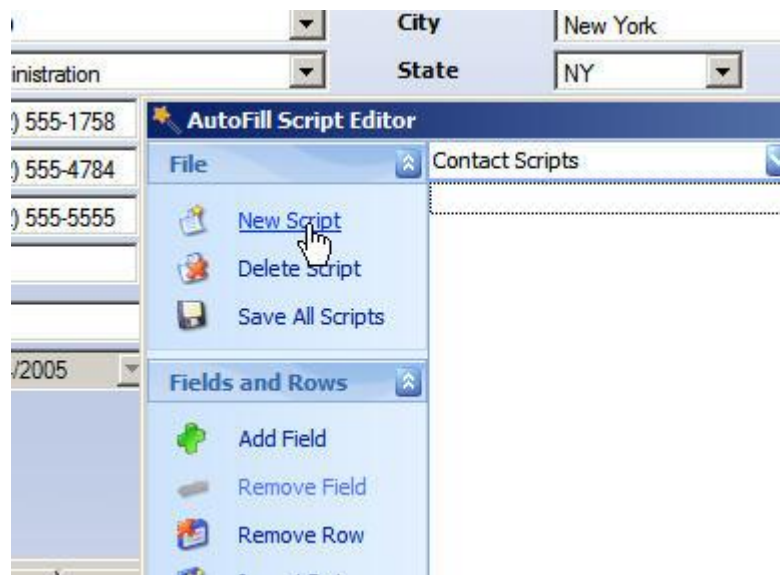
AutoFillEditor

Creating a new script

Scripts can be created for either the Contact view, the Company view or the Groups view. To select which view your script will be created for, click the drop down as seen below and select the desired option. In the example below, we are choosing a "Contact Script."

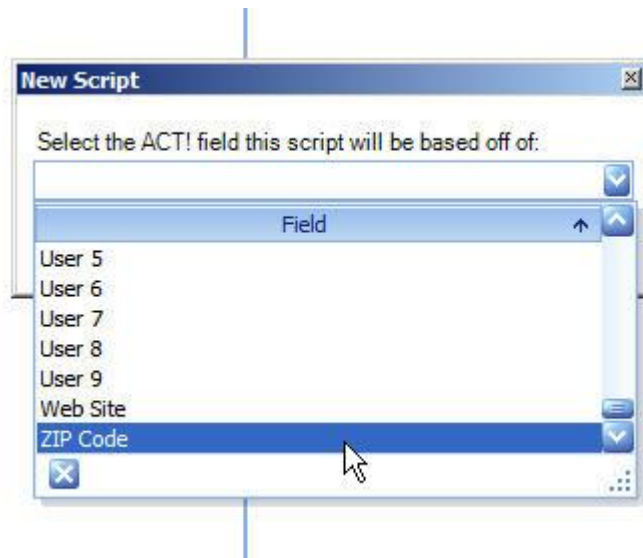


To create the new script, click on the "New Script" option from the "File" section. In this case, the script will be created for the Contact view.



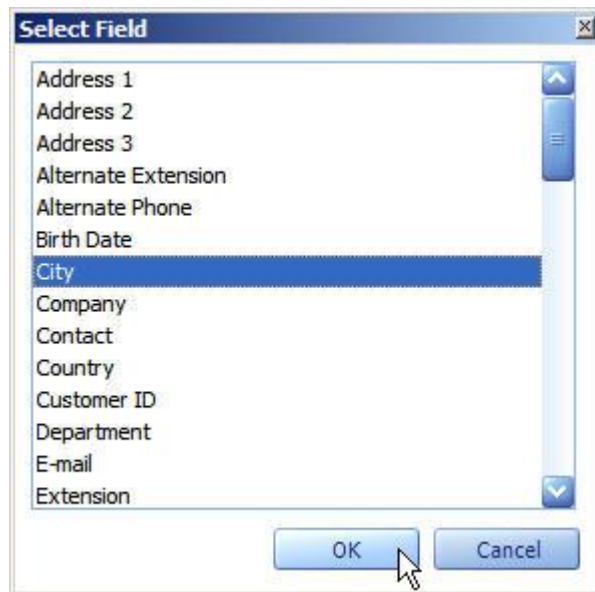
Selecting the ACT! field

Now you must select which ACT! field the Script will be triggered from. In the example below we are creating a script that the "Zip Code" field will trigger. Once you have selected a field, click OK to proceed.



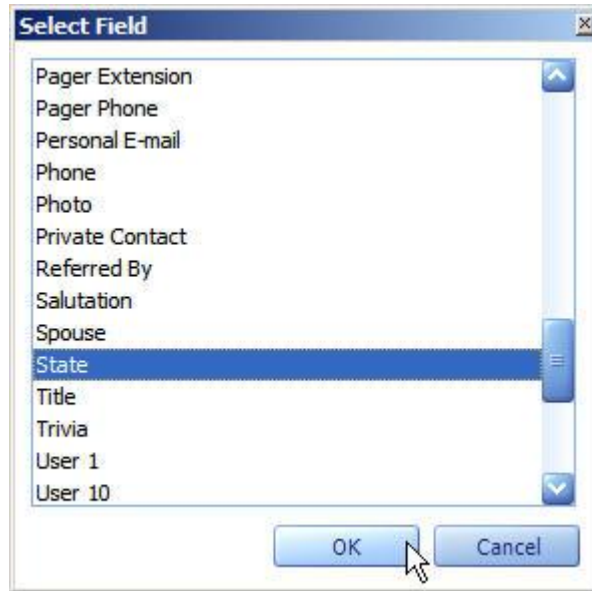
Adding fields to the script

Now we will add fields to the script with the data we want to AutoFill. In the example below, we are adding the "City" and the "State" fields to the script.



AutoFillEditor

Next we will add the "State" field.

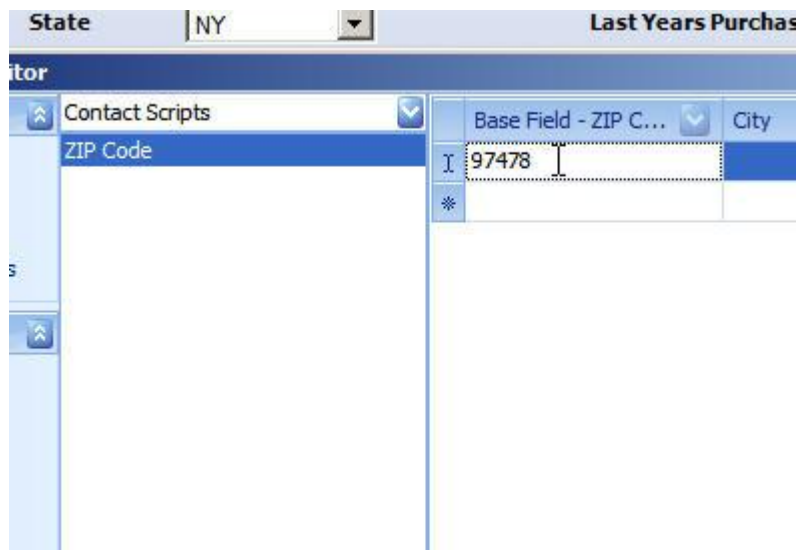


Now you have added the fields to the script. The next steps will be to fill in the desired data.

Filling in the script data

Next we need to fill in the data that the script will be using. In the example below, we are filling in Zip Codes with the City and State data they will use. See the example below:

Here we are entering a Zip Code for the trigger field.



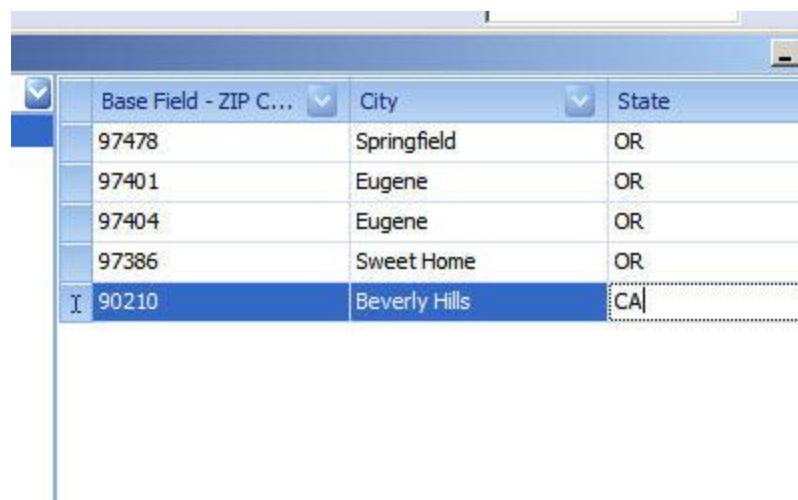
AutoFillEditor

Now we must add the corresponding data that will be automatically filled in when this Zip Code is entered.



You can repeat these steps as much as you like for entering multiple items. See the example below of some Zip Codes entered with their corresponding City and States.

NOTE: When entering a large amount of fields, this can cause ACT! to take a bit longer to load. These scripts along with their data are loaded at startup. Once ACT! is loaded, it will run at normal speed. It only affects the amount of time it takes to load ACT!.



Once you are done entering all of the data for your script, click OK to finish. Now your script is complete and will not be used when data is entered into the base fields you created. So in our example, if you enter the Zip Code "97478" on a contact, then the city and state fields will be AutoFilled with "Springfield" for the city and "OR" for the state.

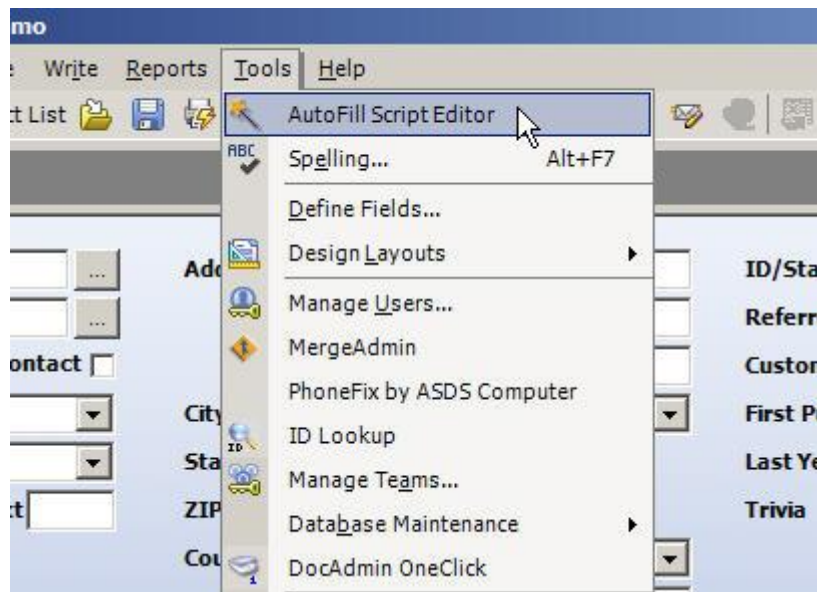
Importing Data into a Script

NOTE: You must first have a script created before you can import data into it.

IMPORTANT! Your Import file **MUST** have a header row or the first row of data will be skipped due to this being used as the header row.

AutoFill has the ability to import script data. For example, if you had a delimited file with zip codes with their corresponding city and states, then you could use the import feature instead of manually entering them as we did in our example under "Creating AutoFill Scripts". To use the import feature see the steps under this help topic.

Open the AutoFill Script Editor from the TOOLS menu in ACT!.

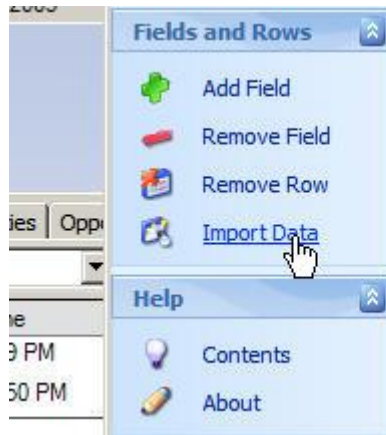


Choose the "Import Data" option

In this step you will select the script that you want to import your items into. You must have a script setup with its corresponding fields first before choosing the "Import Data" option.

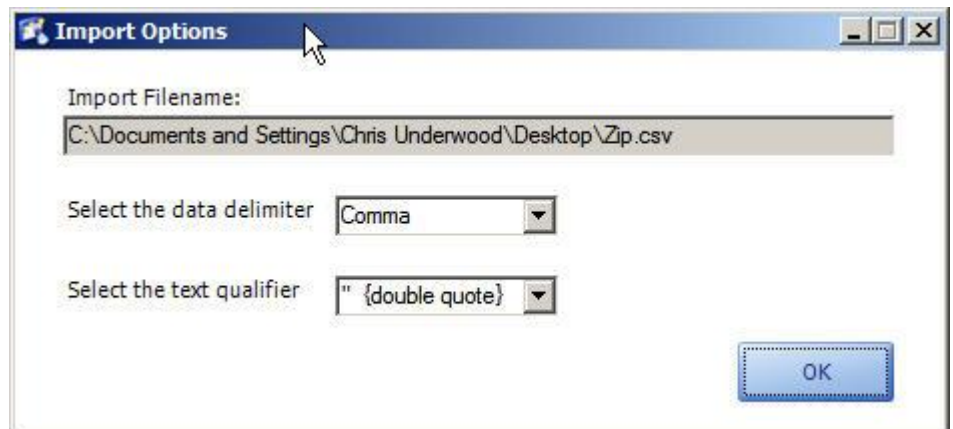
AutoFillEditor

Click on "Import Data" from the "Fields and Rows" section of AutoFill Script Editor and choose your import file.



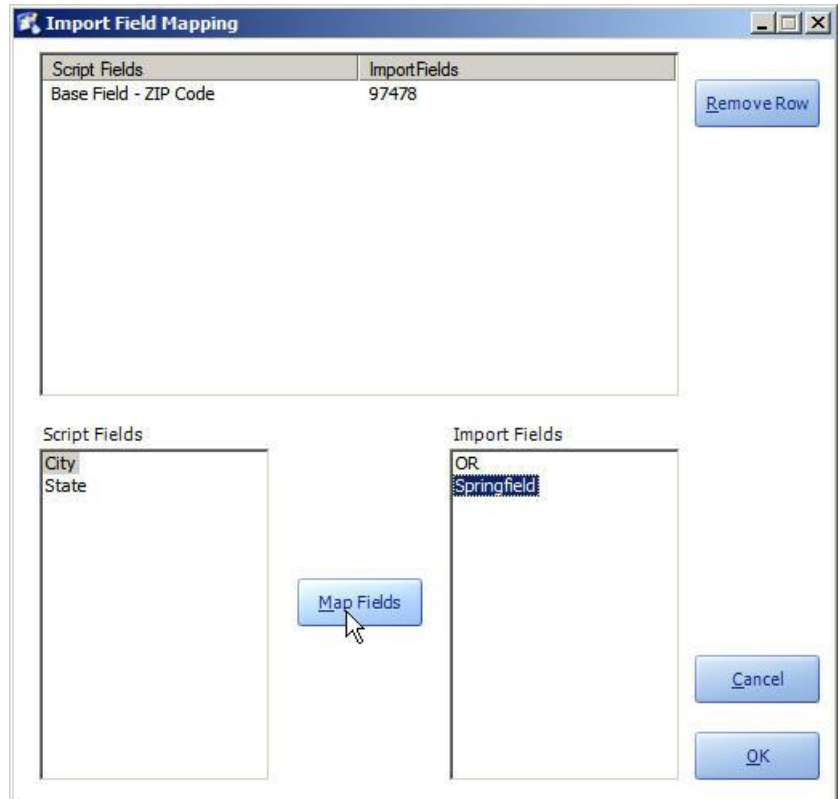
Set your import file options

During this step you must set what the delimiter is in the import file as well as what is being used as the text qualifier such as double quotes or single quotes or none. Once you have set these options, click OK.



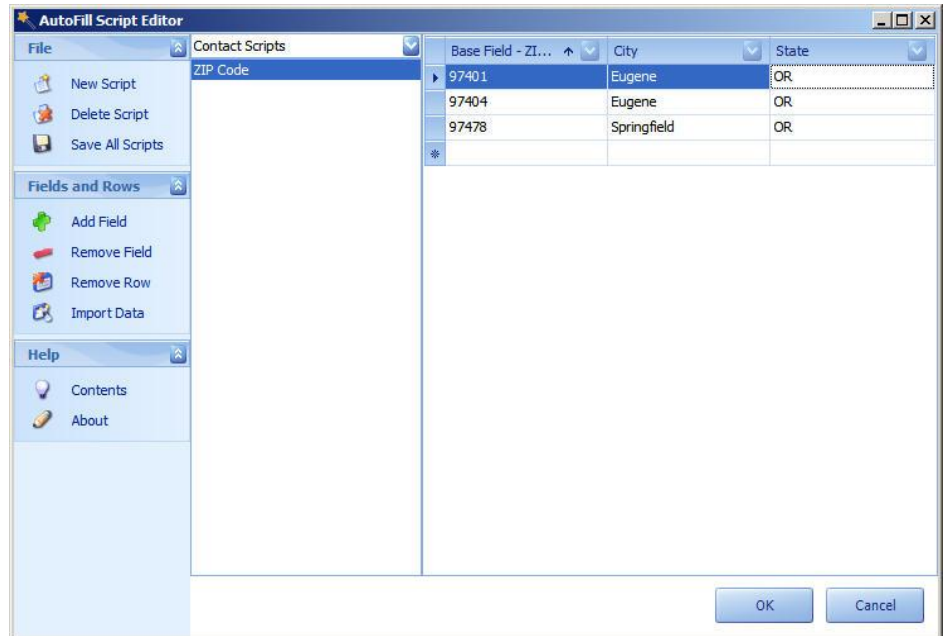
Mapping your data

Now you must map the import data to the fields you specified in the script. To accomplish this, you will select the field on the left and then select the field on the right that matches and press the "Map Fields" button to move the pair to the window above. See the example below where the actual zip code was mapped to our Base Field of "Zip Code":



AutoFillEditor

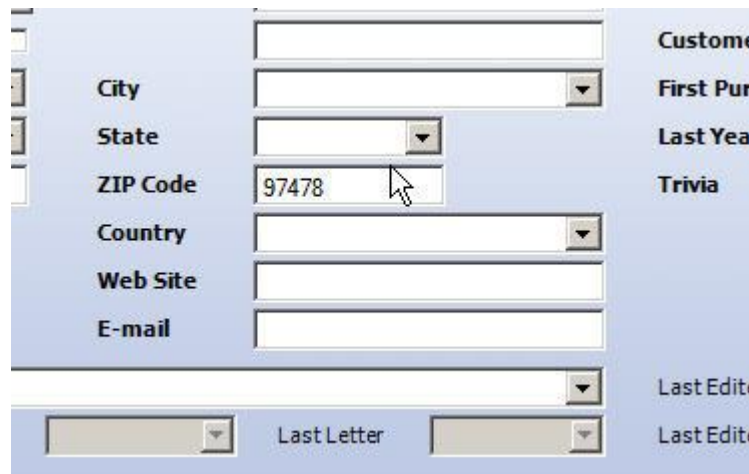
When the mapping is complete, click OK to go to the next screen. Here you will see the list is populated automatically compared to what we did manually earlier.



Using AutoFillEditor Scripts

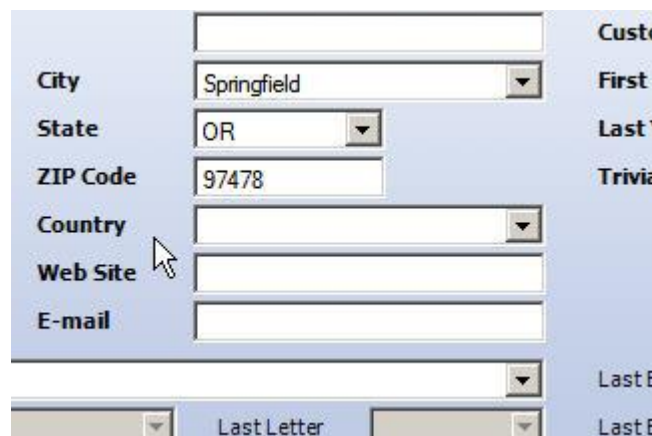
AutoFill scripts are loaded during ACT! startup. Once ACT! is running your script is enabled. See the example below of using the Zip Code AutoFill Script we created. When the zip code is entered and you leave the zip code field, the City and State fields are auto populated with the data from the script.

Here we are entering a Zip Code into a database that has been loaded with our saved AutoFill Script:



A screenshot of a database form with a light blue background. The form contains several fields: City, State, ZIP Code, Country, Web Site, and E-mail. The ZIP Code field contains the text '97478'. To the right of the form, there are labels for 'Customer', 'First Purchase', 'Last Year', and 'Trivia'. Below the form, there are two 'Last Edited' fields and a 'Last Letter' field.

Now the script automatically runs and you see the City and State fields are populated with the data that was entered into the script for that zip code.



A screenshot of the same database form as above. The City field is now populated with 'Springfield' and the State field is populated with 'OR'. The ZIP Code field still contains '97478'. The other fields (Country, Web Site, E-mail) are empty. The labels on the right and the 'Last Edited' and 'Last Letter' fields at the bottom are the same as in the previous screenshot.

Contact Us

We offer several services to meet your technical support needs. Technical Support is available by visiting the ASDS Computer web site at:

<http://www.asdscomputer.com/support/>

Please visit us today!

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