

# Automatic Web Forms II

for ACT! 2011 and up



## User's manual – part 1

How to create a simple Web form

How to access the add-on.....	2
How to setup a free account.....	2
How to create a form.....	4
Viewing the form .....	8
Downloading form results.....	9
Private forms.....	9
Getting an e-mail confirmation when data is submitted.....	11
Contacting support .....	12

## How to access the add-on

Once installed, look at the top ACT! menu for the Automatic Web Forms notification area. At any time, from any ACT! screen, you may access the add-on by double-clicking it.

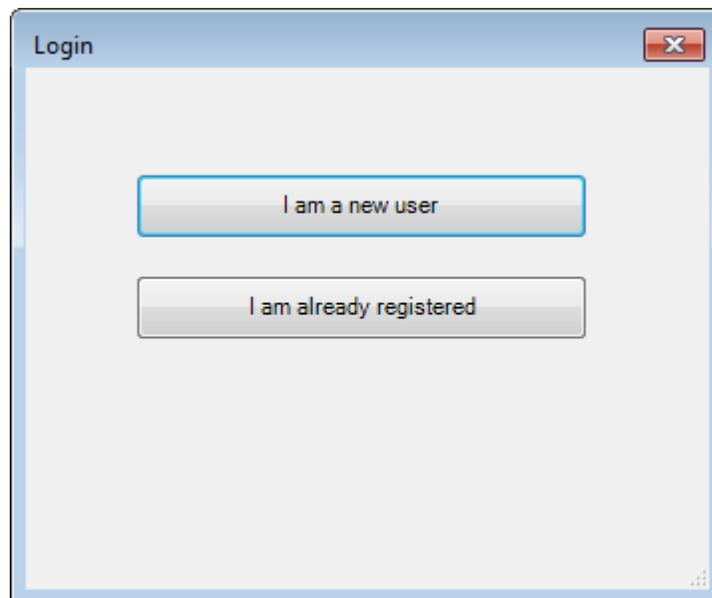


An icon will be added automatically to your ACT! Contact Detail View toolbar. You may also open the add-on tool by clicking it.



## How to setup a free account

When you launch the add-on for the first time, you get the following screen:



Click on "I am a new user" and fill in the required information to setup your free subscription.



The image shows a software window titled "Login" with a close button in the top right corner. The main content area has a light gray background and contains the following text and form elements:

- FREE SUBSCRIPTION** (in red, bold text)
- Enter the information below (all fields are required) and click Register to enable your free subscription plan. (in red text)
- Two input fields: "First Name:" and "Last Name:"
- One input field: "E-mail:"
- A button labeled "Register Online (FREE)"

Once registered, you will see your registration information screen, simply close it.

## How to create a form

You are now ready to create your first form. Go to *Forms>New Form* to enter the form creating wizard.

In the first screen, give a name to the form (for internal use) and choose the type of record you want to import back into ACT!

**Form Basic Details**

**Basic Form Information**  
The name, the type of records and the access type of the form.

Name of the form (30 characters max.):  
 ?

Main Record:

- Contact
- Company
- Group
- Opportunity
- Other:

Secondary Records (Optional):

- Company
- Group
- Opportunity
- Note
- History
- Activity

Access Type:

- Public Form
- Private Form (requires login)

In the second screen, choose the fields you want to appear in the form. Note that in the list of *Contact fields*, the field *Contact* does not appear, you have to use *First Name* and *Last Name* instead.

**Form Basic Details** [X]

**Field Map**

Select the fields you want included in the form. Make sure you check the selection order as they will appear in the form in the same order.

Available fields:

- Contact | Address 1
- Contact | Address 2
- Contact | Address 3
- Contact | Alternate Extension
- Contact | Alternate Phone
- Contact | Anniversary
- Contact | Attachment
- Contact | Birth Date
- Contact | Blog
- Contact | Cabinet
- Contact | City
- Contact | Closed Date
- Contact | Company
- Contact | Contract Date

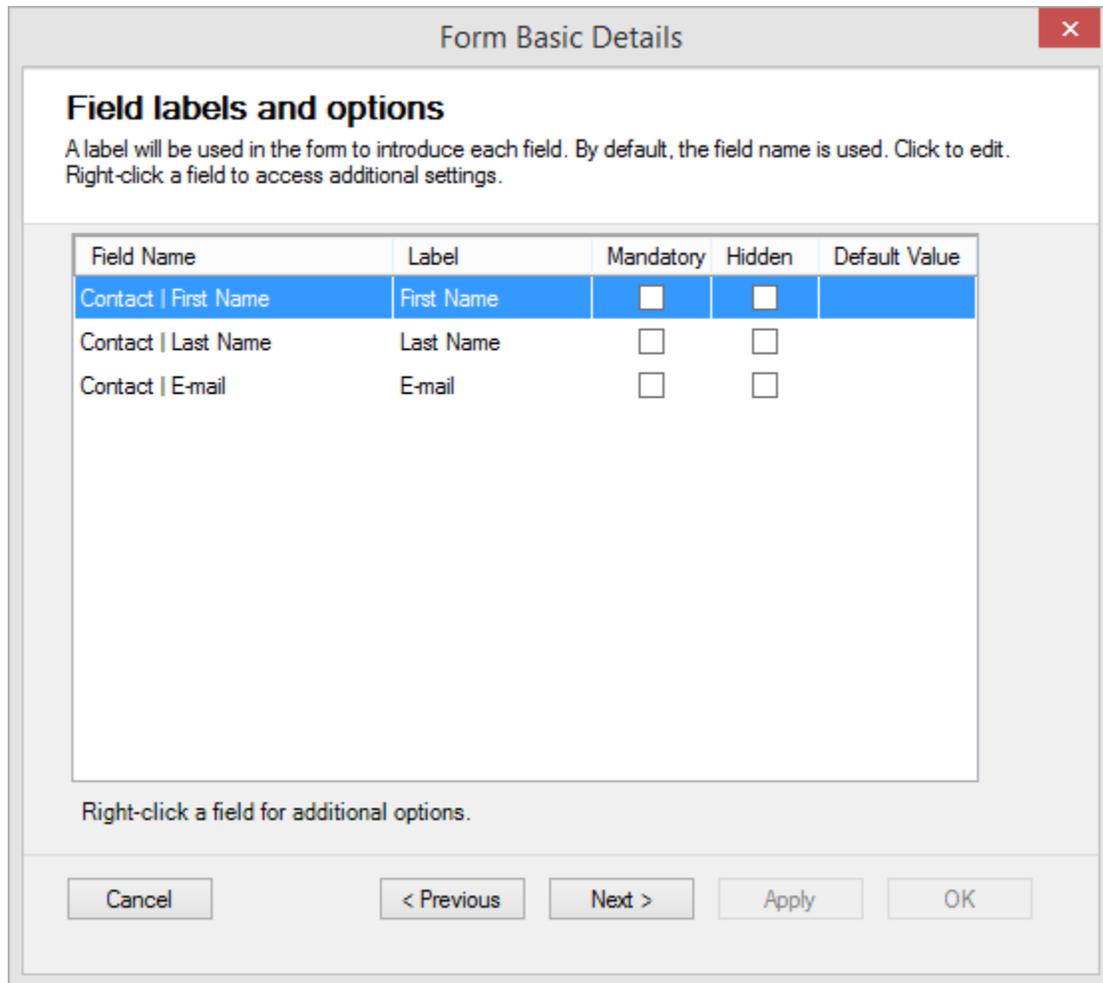
Selected fields:

- Contact | First Name
- Contact | Last Name
- Contact | E-mail

Buttons: Cancel, < Previous, Next >, Apply, OK

The order in which they appear in this screen is the order in which they will appear in the form, so make sure you use the up and down arrow keys to sort them to your liking.

In the next screen, you have the option to customize the labels, make a field mandatory or hidden.



**Form Basic Details**

**Field labels and options**

A label will be used in the form to introduce each field. By default, the field name is used. Click to edit.  
Right-click a field to access additional settings.

Field Name	Label	Mandatory	Hidden	Default Value
Contact   First Name	First Name	<input type="checkbox"/>	<input type="checkbox"/>	
Contact   Last Name	Last Name	<input type="checkbox"/>	<input type="checkbox"/>	
Contact   E-mail	E-mail	<input type="checkbox"/>	<input type="checkbox"/>	

Right-click a field for additional options.

Buttons: Cancel, < Previous, Next >, Apply, OK

If you have a long label to type, you can double-click the label cell and the Edit Label will popup. Note that you can use HTML tags in your labels. So you could type a question, add a hyperlink and more.



**Edit Label**

I have read and accept the [Terms and conditions](http://www.website.com/conditions.pdf).

You may use HTML tags.

Buttons: OK, Cancel

### **Why would you hide a field?**

*The idea of hiding a field is obviously to make it invisible to the form user which makes no sense if you, at the same time, do not define a default value. But if you make a field hidden and define a default value, when you import the form result into ACT!, the field will automatically be given the default value.*

*Imagine you have 2 forms: one for vendors and one for prospects. In the one for the vendors, you could include the ID/Status field, make it hidden and define Vendor as default value. You could do the same for the second form and set the default value to prospect. This way, each record that will be imported into ACT! will automatically have its ID/Status set correctly.*

In the next window, you have the option to give a title to the form (it defaults to the internal name of the form that you set up in the first screen), you can customize the *Submit* button text and the *Thank You Message* that is displayed once the form has been submitted.

The *Next Page URL* is the URL that appears below the Thank You message. It might be a link to go back to your web site or whatever the next step is in your form process. It is a hyperlink so you have to define the text of the link and the URL address you want the user to be sent to when he clicks the link. If you do not want to display a Next Page link, simply leave the 2 fields blank.

**Form Basic Details**

### Form Text

The title, button text, thank you message and Next Page link are fully customizable (you may use HTML tags).

Form Title:

Form Introductory Text (HTML):

Submit Button Text:

Thank You Message (HTML):

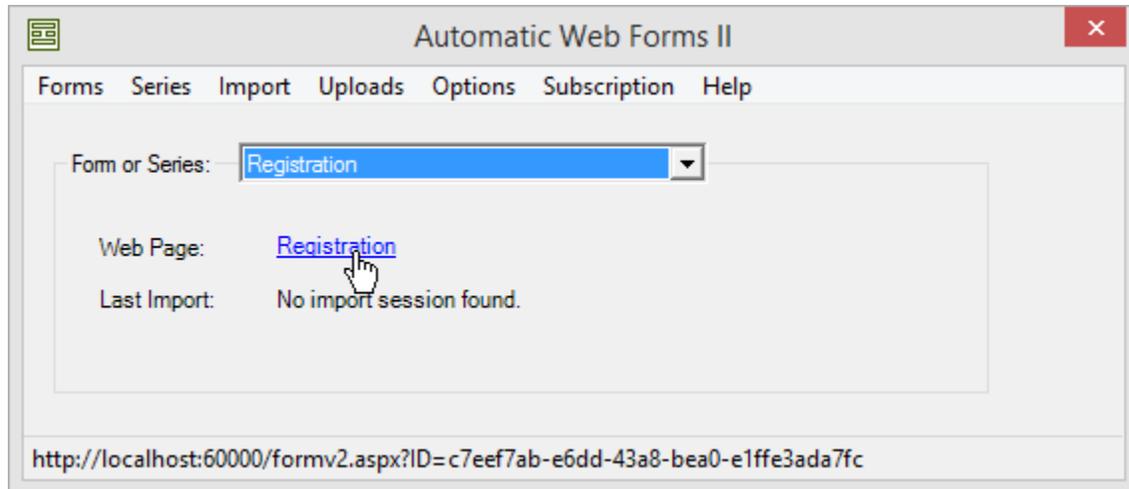
Next Page Text:

Next Page Link (in most cases, it should start with http://):

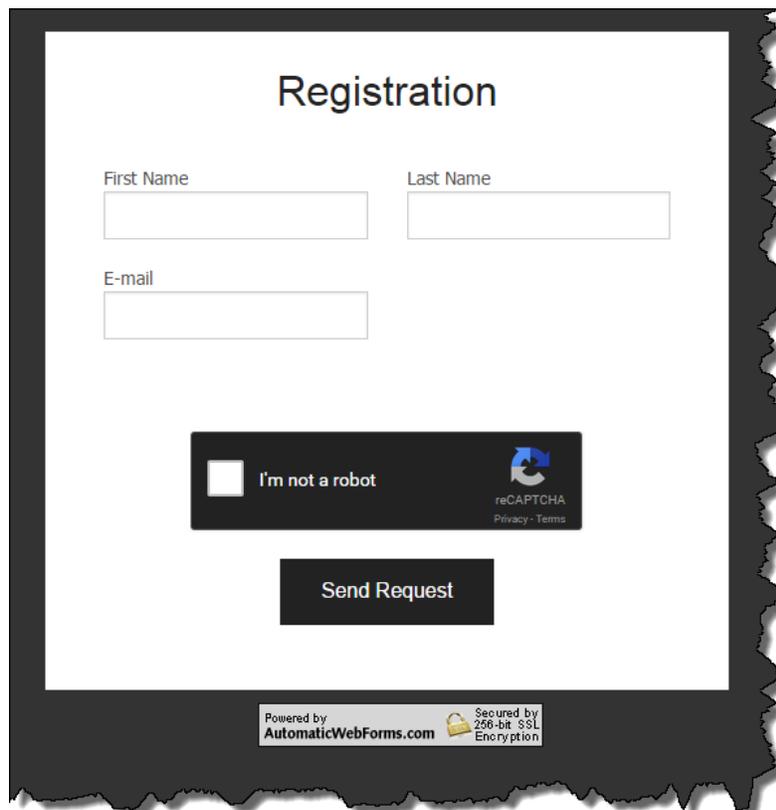
## Viewing the form

Once you are done creating a very basic form, click *Save*. You will get prompted to define your import settings. Click *No* (we will cover this aspect in another document).

You are now back to the main screen:



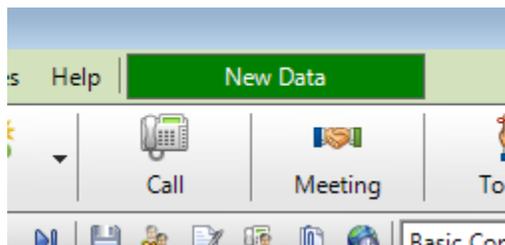
Click the **blue link** and your form will open in your browser. As we said, this is a basic form. Every aspect of it can be customized. We will see this in a later document.

A screenshot of a web registration form with a dark, torn-paper border. The form has a title 'Registration' at the top. Below the title are three input fields: 'First Name', 'Last Name', and 'E-mail'. At the bottom of the form, there is a reCAPTCHA widget with the text 'I'm not a robot' and a checkbox. Below the reCAPTCHA is a black button labeled 'Send Request'. At the very bottom of the form, there is a footer that says 'Powered by AutomaticWebForms.com' and 'Secured by 256-bit SSL Encryption'.

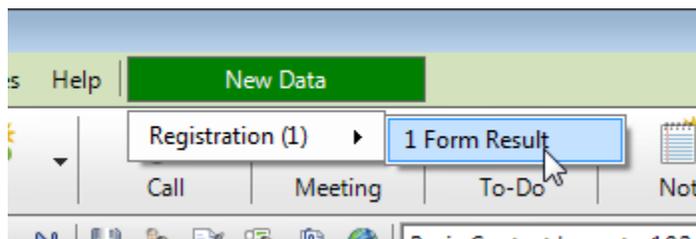
For testing purposes, enter data in all the fields, check the “I’m not a robot” checkbox and click the *Send Request* button.

## Downloading form results

Go back into ACT! Close the *Automatic Web Forms* window. Your notification area should look like this:

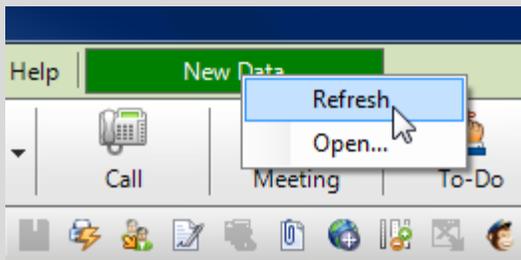


Click it. You now see your form name and the number of results to import. Click the *Form Result* menu item and a new contact will be added to your database.



### NOTE:

Automatic Web Forms checks for new data every 5 minutes. If you want to refresh it sooner, you can right-click the notification area and select Refresh.



In this manual, we will not go any further, but make sure you check the [Automatic Web Forms web site](#) for more tutorials and manuals, for instance to cover the customization of your forms and the import settings which is an essential piece of this software (duplicate checking, history or activity creation, etc.).

## Private forms

In the first page of the wizard, you have the option to make your form Public or Private. What we have created here was a public form. On the last page of the form, there is a *captcha*, i.e. a security applet which randomly generates a code you need to manually enter in a confirmation box. This is designed to prevent robots from flooding servers with automatic requests.

If you plan to use a form for data entry, i.e. you create a form for one of your employee to enter data into ACT!, the captcha would be highly unproductive. This is where Private forms come in handy.

A Private form is a form that can be accessed after identification (username/password) and does not use a captcha. The logic is to have the user of the form identify himself the first time he accesses the form, so that we do not have to add a security layer when submitting data.

To create a private form, select the option *Private* under *Access Type* in the first page of the wizard. Then click the *Credentials...* button to set up your users' username and password.

**Form Basic Details**

### Basic Form Information

The name, the type of records and the access type of the form.

Name of the form (30 characters max.):  
Registration

Main Record:

- Contact
- Company
- Group
- Opportunity
- Other:

Secondary Records (Optional):

- Company
- Group
- Opportunity
- Note
- History
- Activity

Access Type:

- Public Form
- Private Form (requires login) **Credentials...**

Cancel < Previous Next > Apply OK

Use credentials from:

Use specific credentials:

Username	Status
Jasmine	Active
John	Active

You can add as many users as you want. If you already have a form set up with credentials, you can simply use the same credentials. Choose *Use credentials from* and select the form with proper credentials. If the same credentials are used, a user already logged on will be able to switch between forms without having to identify himself.

## Getting an e-mail confirmation when data is submitted

Although Automatic Web Forms is designed to notify you directly from within ACT! when data has been submitted through your forms, you might find it convenient to receive an e-mail at the same time. You may include more than one e-mail address in the email address box. If you do, just make sure you separate them with a comma (also note that all e-mail addresses will appear to all recipients).

To set up e-mail notification, go to *Forms>Edit Forms>Server Triggers>Internal E-mail Notification...*

Form:

Settings:

E-mail address:

Send Notification without Data

Send Notification with Data (not recommended for security reasons)

### **Why is Sending Notification with Data not recommended?**

We consider it not recommended because it is not secure. When the submitter submits data to the Automatic Web Forms server, the connection is secured (SSL connection). When you download data from the server into Act!, it is again through a secure connection. But when you send yourself this data through an e-mail message, the connection is not secure at all.

### **Contacting support**

Support is provided by e-mail at [support@exponencial.com](mailto:support@exponencial.com).

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