Automatic Web Forms II

for ACT! 2011 and up

exponenciel

User's manual – part 4

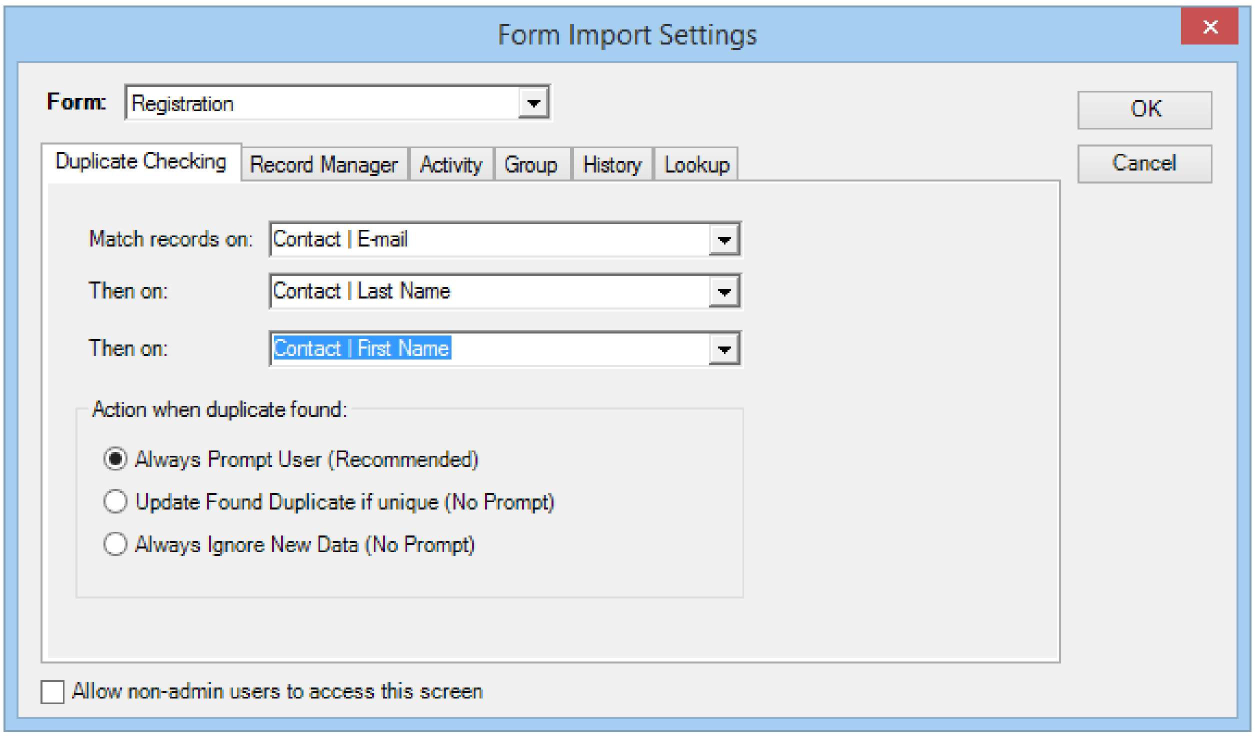
How to import form results

How to edit your import settings

To edit your import settings, launch the add-on by double-clicking the notification area on your ACT! menu bar and go to *Import>Edit Import Settings…*

Duplicate checking

Duplicate checking is important if you do not want to run the risk of getting duplicates in your database. Like in ACT!, you may select up to 3 fields for identifying duplicates.

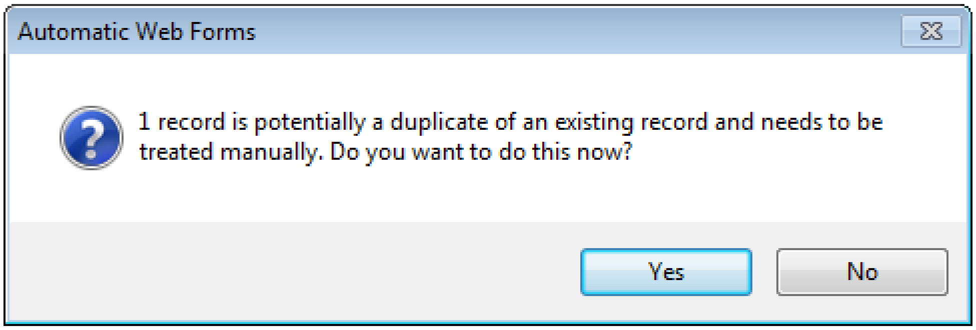


When a duplicate is found, you have 3 options:

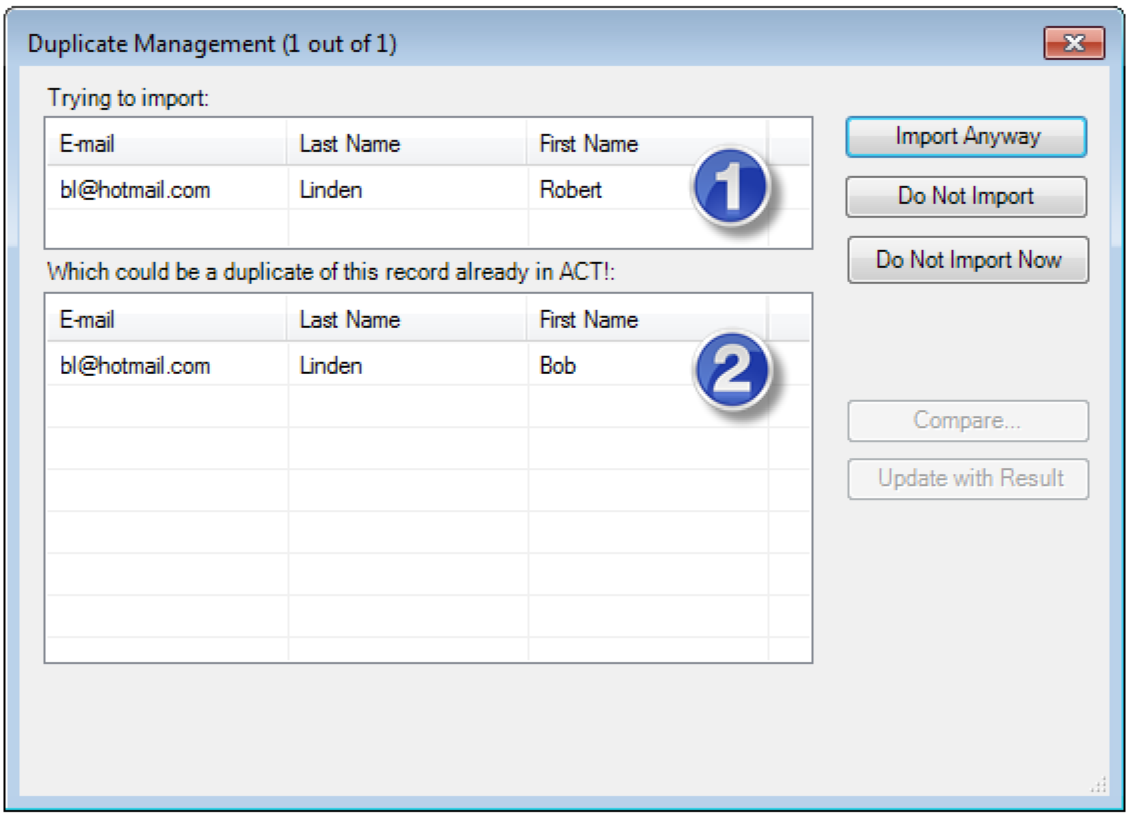
- *Always Prompt User (Recommended)*, i.e. have the add-on display a prompt to confirm whether or not you want to import the form result. This is the recommended option. We will see further down what the prompt looks like.
- *Update Found Duplicate if unique (No Prompt)*, i.e. have the add-on automatically update the record already in ACT! if it just found one duplicate. There will be no prompt at all. The information in the fields included in the form will overwrite existing information in ACT!
- *Always Ignore New Data (No Prompt)*: this makes sense if you are basically just collecting e-mail addresses for instance and the rest of the information if any is not vital.

If you selected the first option and the record you are importing is identified as a potential duplicate, here is what is going to happen.

First, you get this message.



If you click *No*, the form result will remain on the server, so that you may import it later. If you click *Yes*, you get a screen like the one below. Note that the 3 columns displayed are the 3 fields selected for duplicate checking.

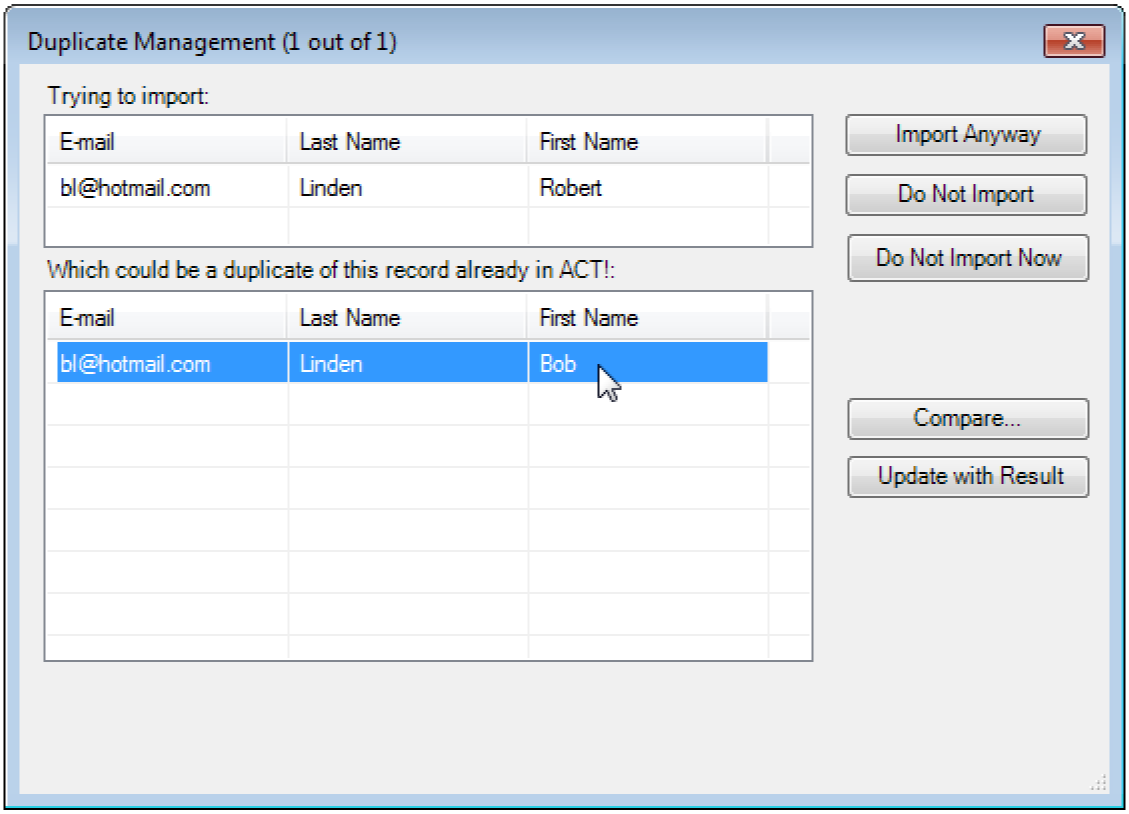


The list at the top (1) displays the record you are trying to import. The list at the bottom (2) lists the records in ACT! that look like duplicates.

You have several options here.

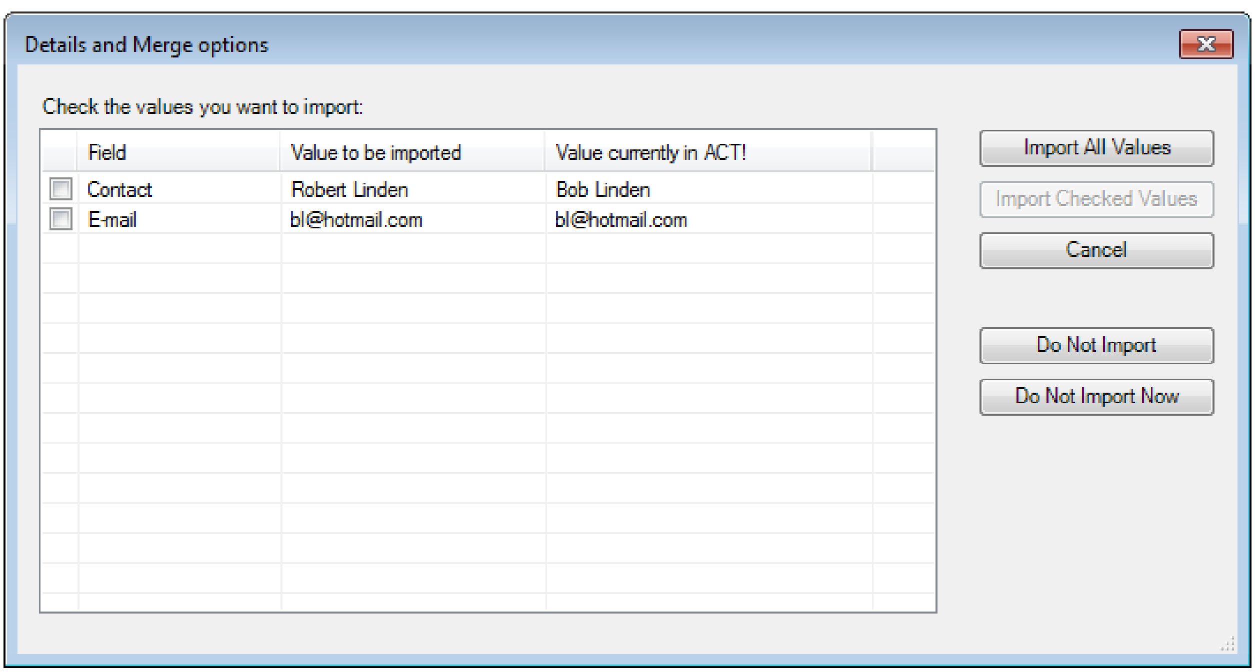
- To import the new record entirely, click *Import Anyway*.
- To not import the record at all, click *Do Not Import*. The data will be flagged as already imported on Automatic Web Forms server. You will not be prompted to import it again.
- To postpone the decision, click *Do Not Import Now*. The data will be flagged as not imported yet on Automatic Web Forms server and therefore will still be available for download from the notification area.

To import selectively (field by field) or to update the record in ACT!, you need to select the record or one of the records in the bottom list (2). This activates the 2 buttons titled *Compare* and *Update with Result*.



Now you have 2 additional options:

- To update the selected record in ACT!, click *Update with Result*. Data from the form will overwrite corresponding fields in ACT!
- To import data selectively, click *Compare…* The following screen will pop up:



In this screen, you can check the values you want to import and then click the *Import Checked Values* button. All other values currently in ACT! will remain untouched.

As you can see, Automatic Web Forms gives you a lot of flexibility as far as duplicates are concerned.

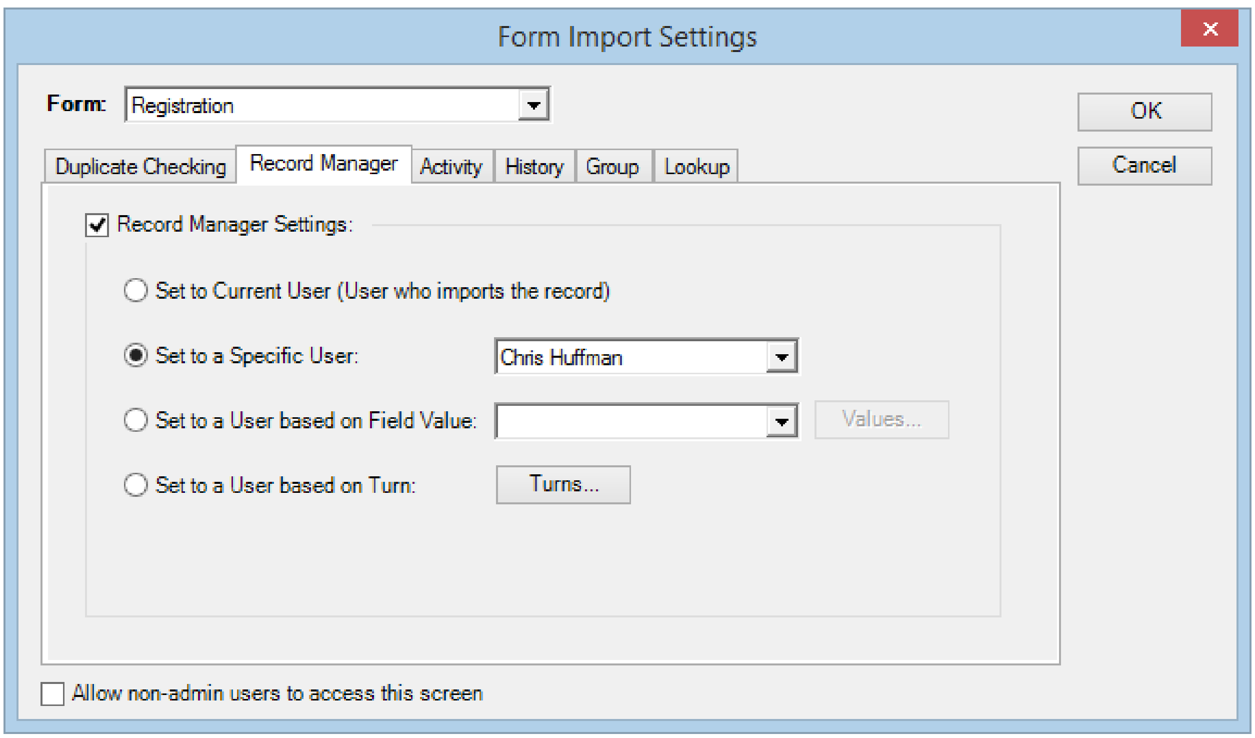
Record Manager Assignment (paid subscription only)

By default, any record imported by the add-on will have for Record Manager the user who is importing the records.

The Record Manager tab gives you more flexibility. The first option is the default option explained above.

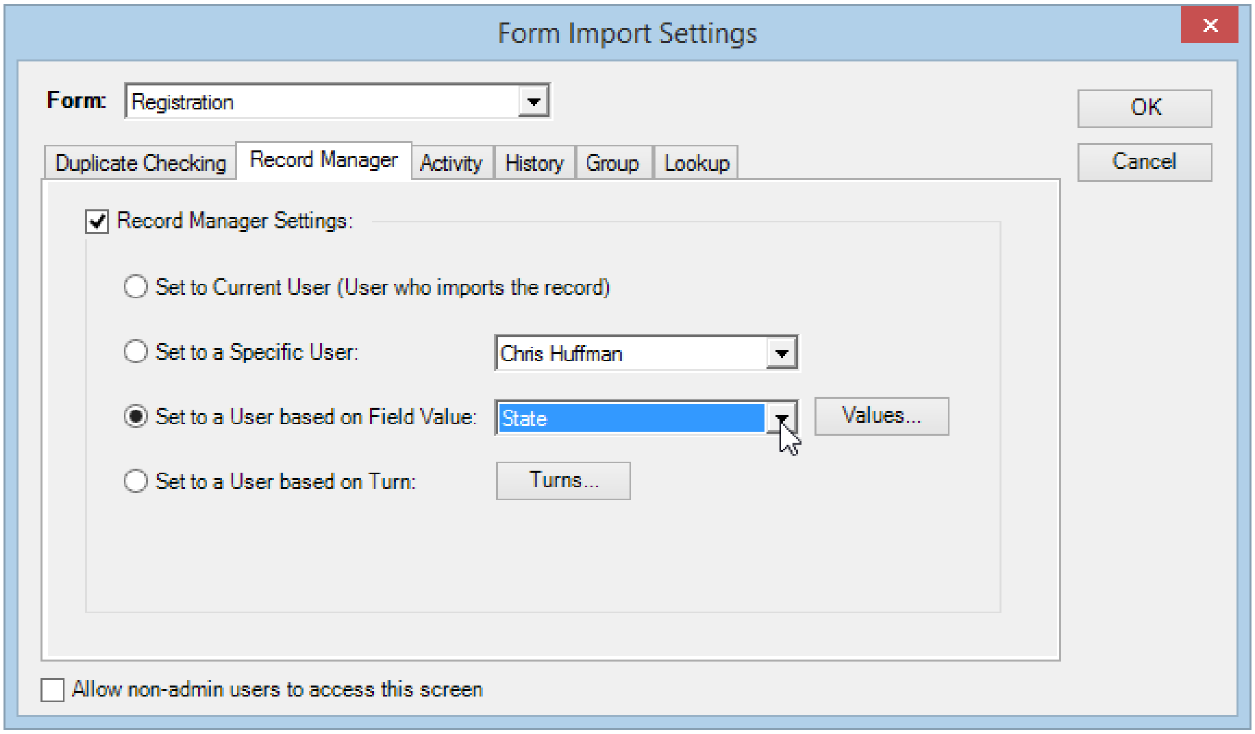
Assigning imported records to a pre-set user

The second option allows you to specify a specific user, no matter who imports the records.

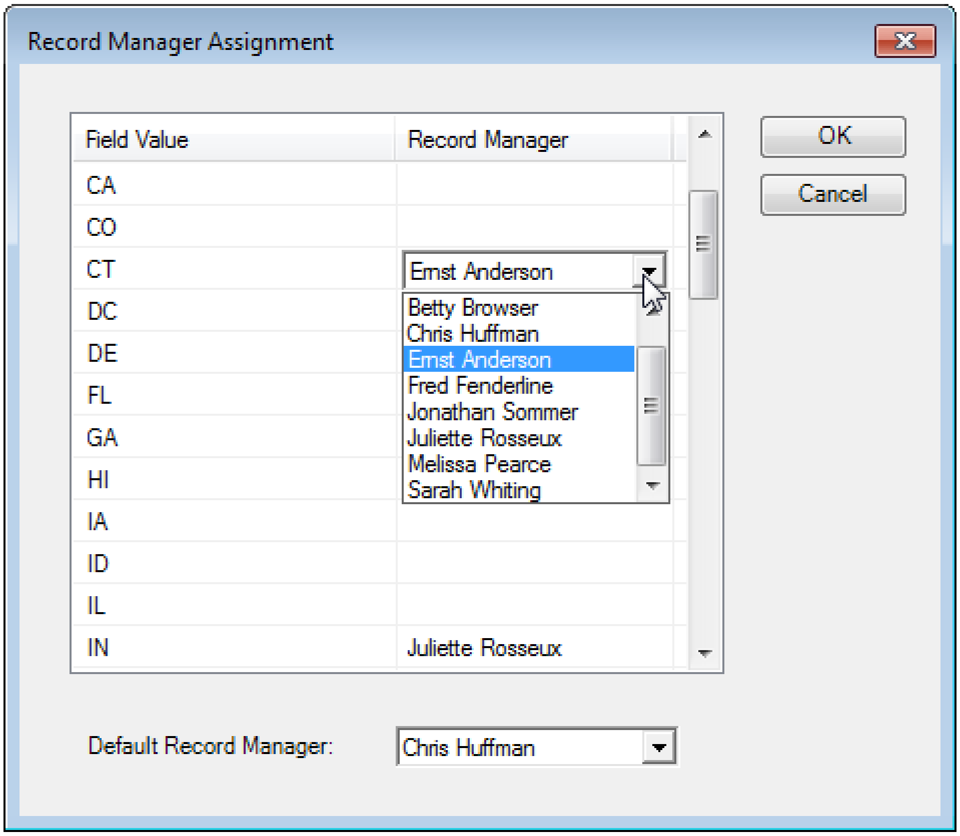


Assigning imported records based on an imported value

If you select the third option, you can pick a field and set the record manager based on the values of this field. In the drop-down list highlighted below, only yes/no fields and fields with a dropdown list appear.



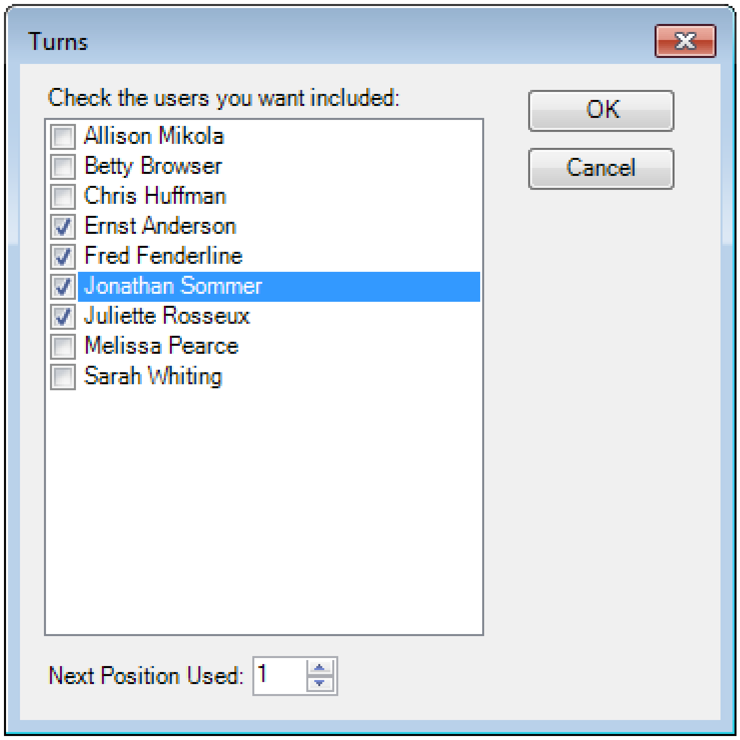
Once you have selected your field, click the *Values…* button. You have the ability to select a user per field value. Note that you have a Default Record Manager at the bottom that serves as a catch-all if you do not assign a record manager to all values.



Assigning imported records a record manager based on turns

The last option is to use turns to set the record manager. If you have a team of sales people covering the same territory and you want to assign the leads to them each in turn, select this option then click on the *Turns…* button.

In the *Turns* window, you are able to select the users you want included:

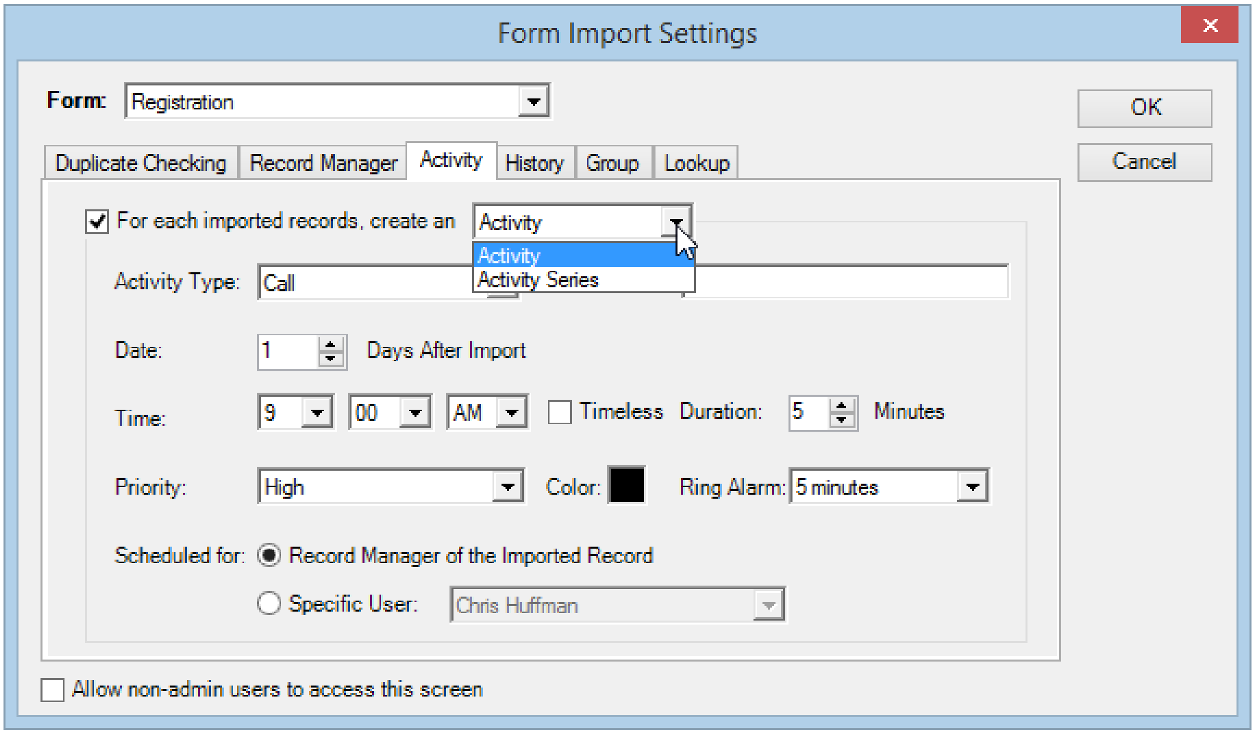


The *Next Position Used* indicates who will be assigned the next imported record. In this case it will be Ernst Anderson as he is in position 1. The next position used is stored on Automatic Web Forms server. Bear in mind that it is not the name of the record manager which is stored but the position. So if you add new users the position might change and you might want to adjust the *Next Position Used*.

Creating an activity after each import (paid subscription only)

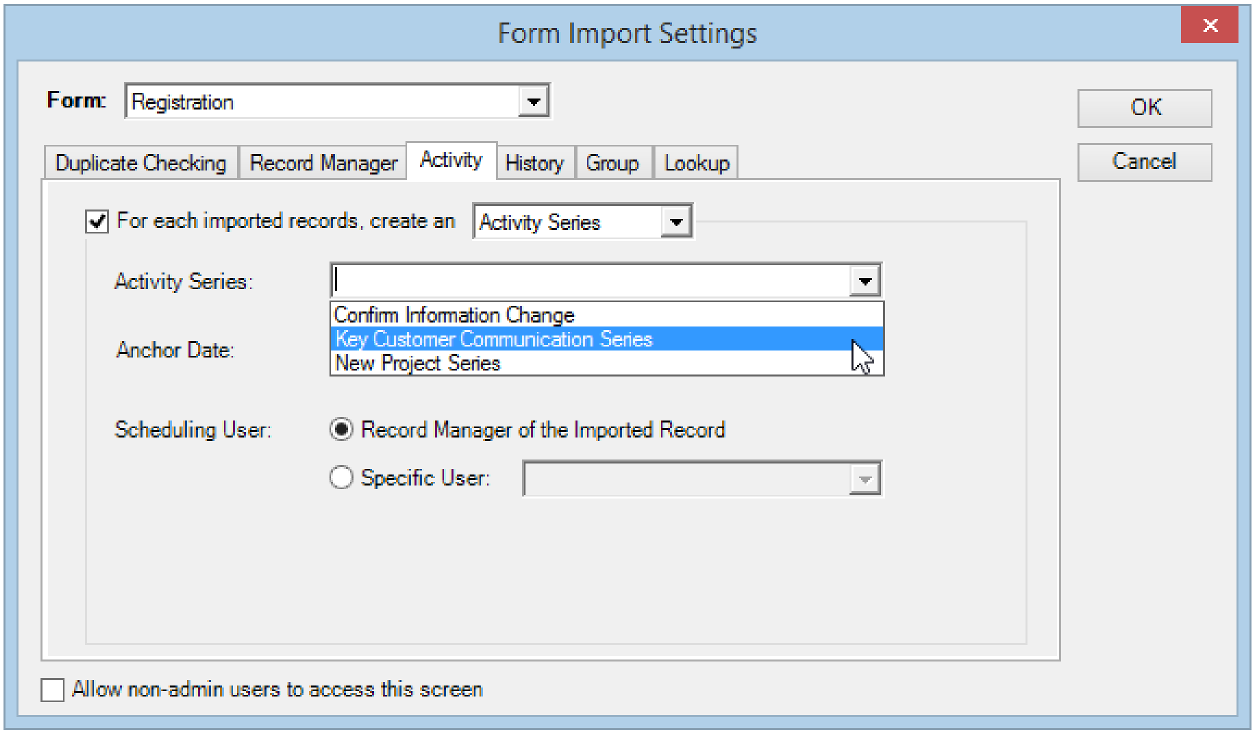
Once a record is imported, you might want to create an activity or an activity series in ACT! to remind you to do something (call the person who registered, send literature, etc.).

The Activity tab allows you to define the settings of this activity.

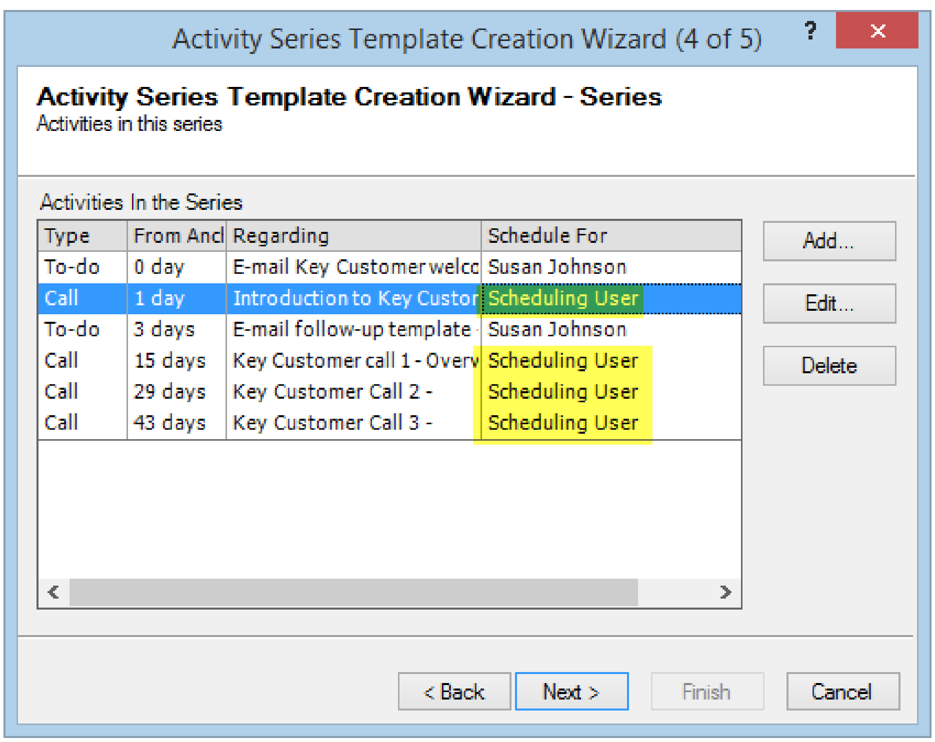


An important setting of this activity is the user it is scheduled for. By default, it is set to the Record Manager of the Imported Record. This means that it will be the same user you have set up under the *Record Manager* tab.

If you wish to create an activity series, instead of an activity, you'll be able to pick among the activity series already created in Act!.

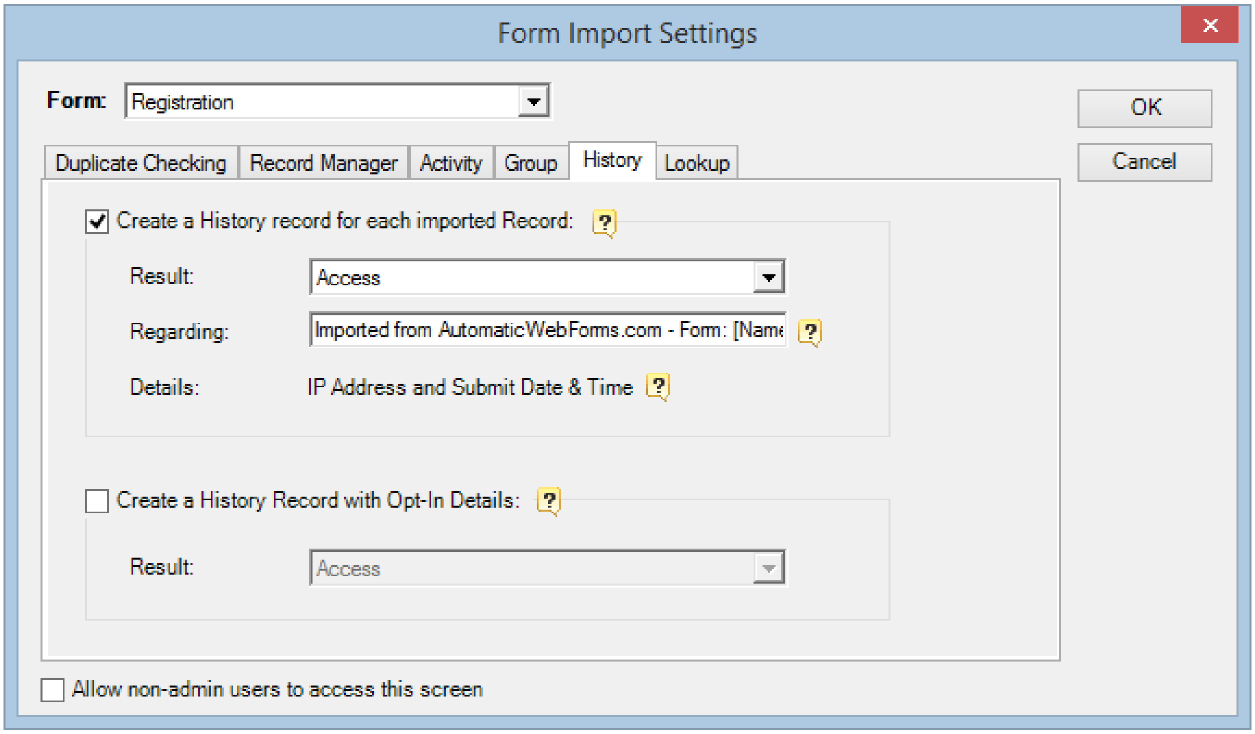


You'll be able to set the Scheduling user. The Record Manager that you choose will only be used when the activity in your series is set to Scheduling user. For instance, if your series is set like the one below, only the highlighted activities will be affected by your Scheduling user setting.



Creating a history record for each imported record

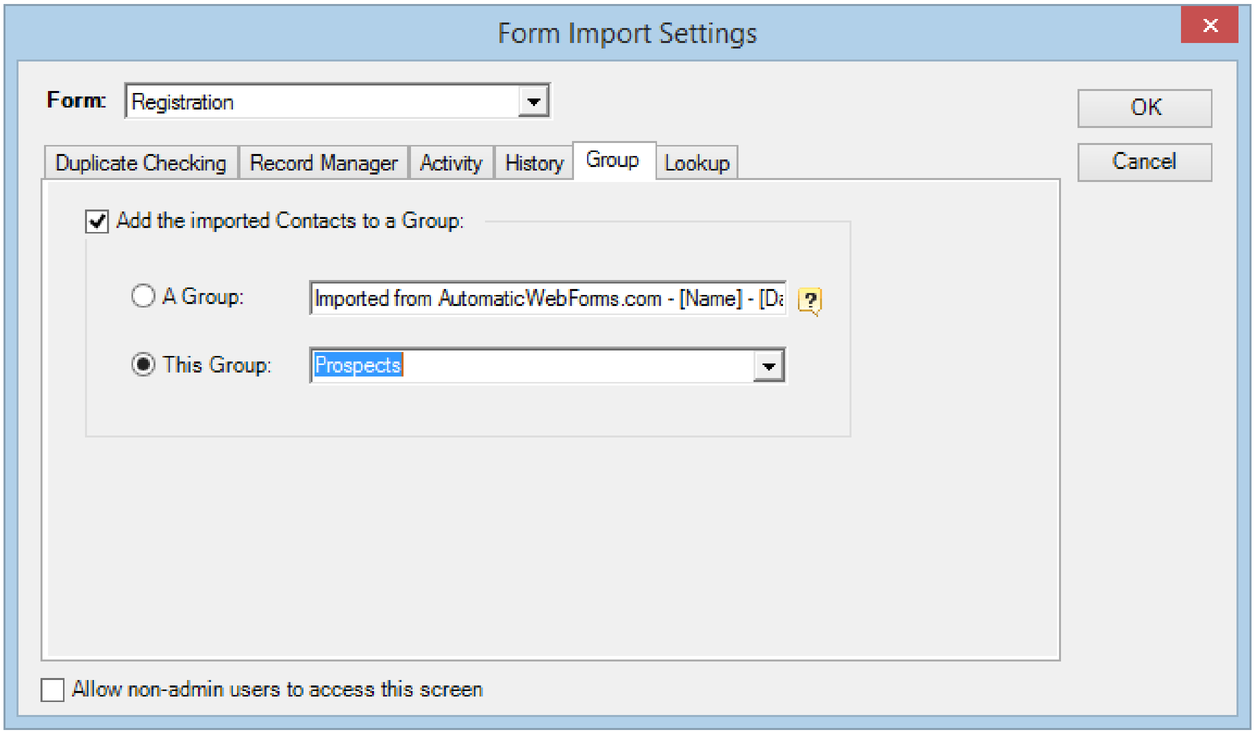
You may have each import be recorded as a history item. This is particularly useful if you want to get a record of the IP address of the person who filled out the form. In the case of a mailing list subscription for instance, with regulations like the the **CAN-SPAM Act**, you may want to have this information available in case of complaint.



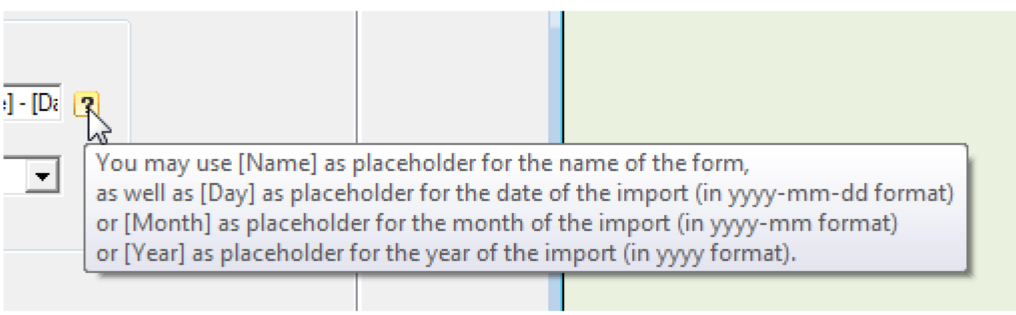
Note that you may use [Name] as placeholder for the name of your form in the *Regarding* field.

Adding the imported contacts to a group

You might find it convenient to automatically add imported records to a group. This option is available for contact records only. You may either choose a static group of a group which name is built on the fly (first option).



If you use the first option, you may include a number of placeholders. Click the question mark next to the text box to find what they are.

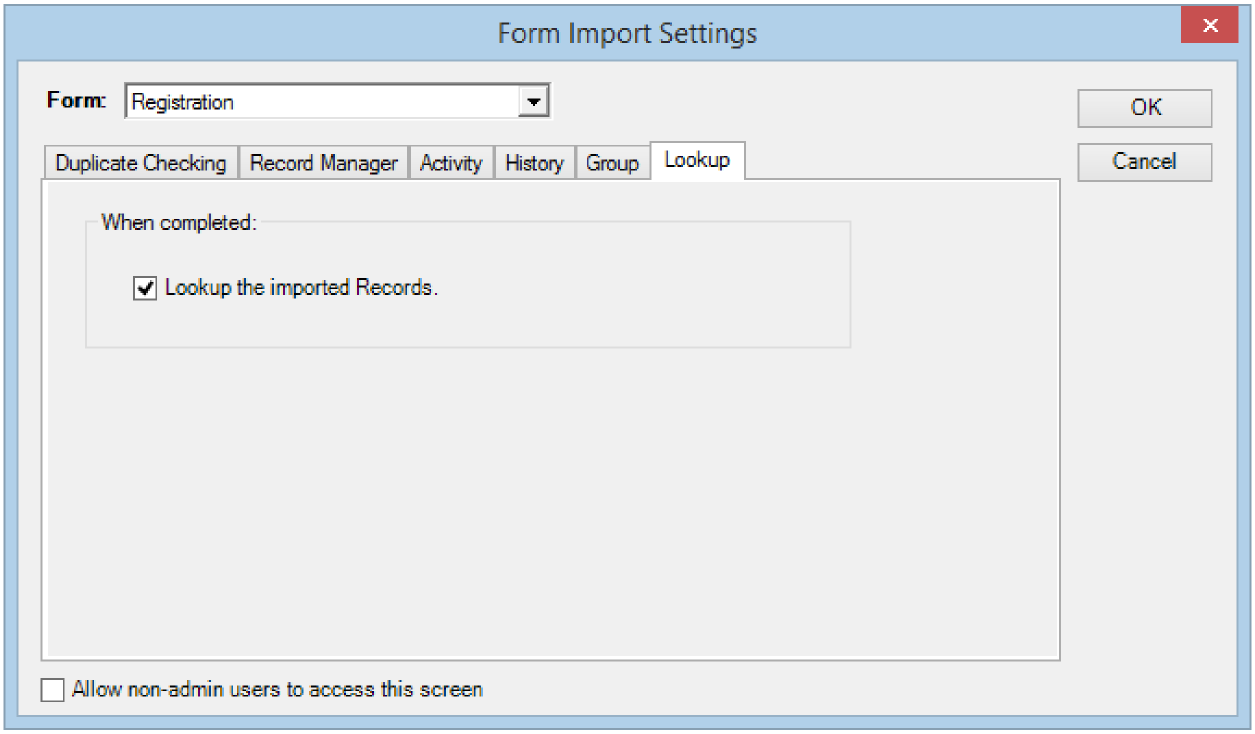


When a contact is imported, the add-on will look for the group name based on the syntax entered.

If you used [Form]-[Month] and your form is called *Newsletter* and you are in May 2013, the group name will be: Newsletter-2013-05. If the group already exists, the contact will be added to this group. If it does not exist, Automatic Web Forms will create it first and add the contact to it.

Creating a lookup of imported records

By default, at the end of the import process, Automatic Web Forms will create a lookup of the imported records or of the parent records of the imported records. You can turn this option on and off under the Lookup tab.



Contacting support

Support is provided by e-mail at support@exponenciel.com.

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