Automatic Web Forms II

for ACT! 2011 and up

e×ponenciel

User's manual – part 6

How to use forms to validate your ACT! data

NOTE: The data validation features are only available to paid subscribers.

The process explained

Automatic Web Forms offers you a great way to validate the data your ACT! database contains by your contact themselves.

The process is simple. You create a form that includes the fields you want to validate. You select a lookup of contacts and upload their data to Automatic Web Forms server (only the data contained in the fields included in the form gets uploaded). Automatic Web Forms creates a unique Web address (URL) and copies it to each contact record (in a pre-set URL address field). Each contact therefore gets a unique address.

You can then send a link with their unique address to your contacts. When the contact clicks on the link, he sees the form already pre-filled with his data. He can make corrections, fill in additional information and submit his new data.

You then get notified in ACT! as usual and may import the new data. This new data is treated the same way as when you import a duplicate (see the document about import settings for more on duplicate treatment). This means that you may globally or selectively import the new data (i.e. you can decide field by field).

Choosing a URL address field for the unique Web address

As explained above, when Automatic Web Forms receives data from your database, it generates a unique address specific to the form and contact. This address needs to be stored in your ACT! record so that you can send it to your contacts.

This information needs to be stored in a text field at least 132 character long. If you do not have one, you will need to create one. To set the Validation URL field, go to *Import>Edit Import Settings…* and select the *Data Validation* tab.

Preventing users to validate their data more than once

There are many possible use of the data validation features of Automatic Web forms. Some of these uses could require that a use can only validate his data once. For instance, if you want to use it for a voting system. Each voter being a contact in Act!, with the data validation system, each gets a unique URL to gather their vote but you want to make sure they only vote once. For this, simply check the box *Only allow one validation per record*.

Making certain fields read-only (for information)

For information purposes, you may want to display certain fields in the validation form that you don't want the user to modify. There is a right-click menu item in the *Field Labels and options* screen of the *Form Basic Details* wizard named *Edit Validation Settings*…

If you select this option, you'll get the *Validation Settings* window which will allow you to set the field to Read-Only. This setting will only be effective in a validation form <u>and</u> when the field is not empty.

Importing validated data directly

Just below the drop-down list to select your Validation field, you have an option to import data without any prompt. If you select this option, the validated data will automatically overwrite any existing data in your ACT! database. We do not really recommend this option as it might result in data loss, if for any reason the person who validated the data decided to wipe some fields out.

Uploading data to the server

To upload data to the server, first make sure the form you want to upload data for is selected in the main window of the add-on and then go to *Uploads>Upload Records For Validation*…
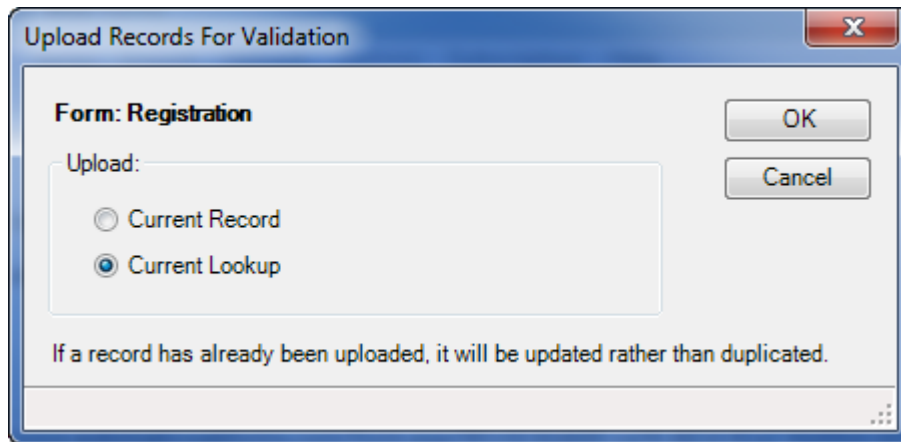
Once records have been uploaded, the field you chose to store the validation url now contains an address specific to the ACT! record.

If you click this link, you will get the form pre-filled with the contact's data.

You are now ready to send each contact his own address and wait for them to validate your data.

Managing uploaded records

Because you get a limited quota of uploaded records, you will want to manage your uploaded records so that they do not sit on the server for nothing. To see how many records can be uploaded, go to *Uploads>Manage Uploaded Records*.

In this window, you can look up the uploaded records in ACT! whether they are validated, not validated and even based on the time that have been on the server. Simply check the appropriate check boxes and click *Lookup Checked*.

If you change the number of days, make sure you click the Update button to refresh the record count.

Using the same method, you may delete uploaded records. Obviously deleting uploaded records has no impact on the data contained in your ACT! database.

Contacting support

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