

Account Number Generator for ACT!2005/2006

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Installation and Usage

Account Number Generator generates an identifier or ID, based on the template and factors that you specify. The “template” controls the composition of each “number”, which can be unique within each database.

You can reference the current user, the current date and/or time, field values from any current record, and a “sequence number”. You can also include number and/or alphabetic constants, along with punctuation. You control how the ID is generated, so that it meets your unique requirements.

Account Number Generator stores the results into either the current record or into each record in the current lookup – either Company, Contact or Group.

Installation

1. Shut down all running programs
2. Run **Install_AccountNumberGenerator.exe**
3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will create (if necessary) the \TNHG subfolder within the folder that Windows “knows” as the “Program Files” folder – usually C:\Program Files. It will create the \TNHG\AccountNumberGenerator subfolder, and install **AccountNumberGeneratorTrigger.exe**, and other supporting files, into that folder. The installation process will also copy into the \ACT\Act for Win 7\Plugins and into the \ACT\Act for Windows\Plugins subfolders (within that same “Program Files” folder) the supporting files necessary to operate within ACT!2005 and ACT!2006.

Usage

The command to execute **Account Number Generator** consists of the entire path-and-filename of the Account Number Generator program, followed by a “command” or “argument string”. Please note that if there are any “blanks” in the

path-and-filename, then it must be enclosed in “quotes” – Windows treats the blank as a “terminator”, and the quotes are necessary to tell Windows that the string continues past the blank.

The Program Name

If the path-and-filename contains any blanks (such as C:\Program Files\TNHG...), then that entire path-and-filename must be enclosed in quotes, such as:

```
"C:\Program Files\TNHG\AccountNumberGenerator\AccountNumberGeneratorTrigger.exe"
```

The Command String

The “command string” consists of entries that start with a “question mark”, followed by a single letter, and “equal sign” and then more information. For example:

```
?V=T
```

```
?T=<C:Account Nbr>=I-D-S(3)
```

```
?F=S:\Triggers\IDTemplate.txt
```

```
?R=M
```

```
?S=L
```

Each “Question mark-Letter-Equals” string is used to tell Account Number Generator a specific detail of its operation:

?V= indicates whether or not you want to view the Account Number Generator window while it is performing its copy operation.

- ?V=T indicates that you DO want to see the window, and that you will need to click the [OK] button on that window when the copying is complete.
- ?V=F indicates that you do NOT want to see the window. This is the default value, and if you don’t want to see the window, you can leave out this entire ?V= “argument”

?T= indicates the “template” to be used in generating the Account Number. . The name of the field to hold the results comes first, followed by the “equals” sign, followed by the other fields and factors to be used in computing the results.

- Each fieldname is enclosed in “carets” `< >` similar to what you’ll see in mail-merge templates.
- Each fieldname includes as the first letter an indication of which record “type” is used as the source of that field. A indicates the Company record, C indicates the Contact record, and G indicates the Group record. The record type is separated from the fieldname by a colon; for example, `<A:Discount>` refers to the Discount field on the Company record.
- Each field (other than the field holding the results) can also have, after the fieldname and before the closing caret (`>`), an optional length specification, enclosed in parentheses. This length indicates how many characters should be used from the field, starting with the left-most character. For example, `<C:District(4)>` would indicate that only the first 4 characters are to be used from the District field on the Contact record.

The RESULT field goes first, followed by the equal-sign, followed by the template. Think “this field COMES FROM that template”.

The template consists of any combination of “codes” (see below) and “constants”, such as hyphen (-), period/full-stop (.), and hash (#). **NB: The question mark (?) and caret (<) and (>) characters are NOT allowed as constants in the account number.**

Available codes are:

- **I** : The upper-case letter I represents the “user’s initials”. The user’s initials are the first letter of the current user’s First Name and the first letter of the Last Name.
- **D (x)** : The upper-case letter D represents the current date. The default format for the date is YYYYMMDD format (4-digit year, 2-digit month, 2-digit day). You can also follow the D with (6), including the parentheses, to indicate that you want the date in the format YYMMDD, or (4) to indicate that you want the date in the format of YYMM.
- **T (x)** : The upper-case letter T represents the current time. The default format for the time is HHMMSS format (2-digit hour using the 24-hour clock, 2-digit minute, 2-digit second). You can also follow the T with (4), including the parentheses, to indicate that you want the time in the format HHMM.
- **S (x)** : The upper-case letter S, optionally followed by a single-digit integer enclosed within parentheses, represents a sequential number with the number of digits represented by the optional integer. If no length is specified, then the number will have as many digits as it takes to represent

the number. If a length IS specified, then the number will contain as many leading zeros as may be needed.

- `U(x)`: The upper-case letter U, optionally followed by a single-digit integer enclosed within parentheses, represents the “user’s logon id”, of the length indicated by the optional integer. If no length is specified, the entire logon id will be used. If a length IS specified, the user’s logon id will be truncated to the indicated length.
- `<e:fieldname(x)>`: Any fieldname (except the “results field”) may be followed by an option “length indicator”, in the form of a single-digit integer enclosed in parentheses. If no length is specified, the entire contents of that field on that current record will be used. If a length IS specified, the contents of that field on that current record will be truncated to the indicated length.

?S= indicates the “scope” of the operation to be performed. The default scope is the **current record** of the type specified in the result field.

- `?S=L` indicates that the scope should be the entire **current lookup** of the type specified in the result field. **Warning: using this scope will update EVERY record in the current lookup, and cannot be undone.**

?F= indicates that the template is to be read from a file instead of being included in the trigger command itself. This can be very handy if your template is really long, or if it changes frequently, or if you’d rather use a text editor to establish or maintain your template. When you use the `?F=` argument, the entire-path-and-filename follows the equal-sign. So, for example, you might use

```
?F=S:\ACT\Common\Triggers\ANG_Master.txt
```

if your template is in the `ANG_Master.txt` file, in the subfolder `\ACT\Common\Triggers` in the shared folder `S:.` The contents of this file should contain **ONLY** the template; it should **NOT** include `?V=` or `?R=`.

?R= indicates the sequence number Reset Frequency. If your sequencing should restart at 0 (zero) periodically (weekly, monthly, yearly, etc.), Account Number Generator needs to know when it should do this. You can set the Reset Frequency to:

- `D`: daily. The first time Account Number Generator is used each day, it will reset the “Last Used Sequence” to 0, so that first number it will generate will include “1”.

- M: monthly. The first time Account Number Generator is used each calendar month, it will reset the “Last Used Sequence” to 0, so that first number it will generate will include “1”.
- Q: quarterly. The first time Account Number Generator is used each calendar quarter, it will reset the “Last Used Sequence” to 0, so that first number it will generate will include “1”.
- WS or WM: weekly. The first time Account Number Generator is used each calendar week, it will reset the “Last Used Sequence” to 0, so that first number it will generate will include “1”. The first day of the week (Sunday, or Monday) is determined by the letter following the W. S indicates that the week starts on Sunday, M that it starts on Monday.
- Y: yearly. The first time Account Number Generator is used each calendar year, it will reset the “Last Used Sequence” to 0, so that first number it will generate will include “1”.

The Batch File

The version of ACT! in commercial release at the time of this writing does not allow a trigger to include a “command string” or “argument list”, like the one that tells Account Number Generator how to operate. Therefore, the trigger definition must be placed in a “DOS .bat file”, and that file used as the trigger definition on the ACT! field. When the .bat file “runs”, a DOS window will appear on the screen, showing the commands included in the .bat file and waiting for the commands to finish. This can be somewhat disconcerting to users, so you might want to include a command to hide this window. (A utility is provided in the \TNHG folder, in case you need one. Its name is `ConsoleTool.exe`, and it uses the `/hide` “switch” to tell DOS to hide the window. An example of its use is included below.)

As an example, you might use Notepad (or any other text editor) to create a file that contains the following lines:

```
"C:\program files\TNHG\ConsoleTool.exe" /hide
"C:\program files\TNHG\AccountNumberGenerator\AccountNumber_
GeneratorTrigger.exe" "?F=C:\Program Files\TNHG\AccountNumb_
erGenerator\ANG_Generator.txt ?V=T"
```

(There are really only two lines in this example but the page isn't wide enough to show the entire second line on a line by itself. The underscores `_` are not really part of the line – they are there only to indicate that the REAL line continues on the next “text line”.)

The above example uses the `ConsoleTool` to hide the DOS window (`/hide`), then runs the Account Number Generator program (`AccountNumberGenerator.exe`),

shows the window while it operates (?V=T), and uses the `c:\Program Files\TNHG\AccountNumberGenerator\ANG_Generator.txt` file to provide the template, reset frequency and visibility setting.

If you save this file as

`ANG_Generator.txt`

In the `s:\act\common` folder, then your trigger would be

`s:\act\common\ANG_Generator.bat`