Batch Field Creator Pro

Installation and Usage

Add any number of pick-lists, pick-list items, and/or fields to the ACT! By Sage Contact, Group or Company records, using an Excel spreadsheet holding the field definitions.

Instead of wending your way through the interactive Field Definition wizard, create a spreadsheet holding the non-default values for the fields you want to define, then “batch” the process. Quick, easy, effortless! And Batch Field Creator can also create pick-lists (“Dropdown Lists”) and add pick-list items the same way.

(Requires Microsoft Excel v9.0 or higher to edit the field definition spreadsheet.)

Installation

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

This will create the \TNHG\BatchFieldCreator folder within your Windows “program files” folder (usually c:\program files), and install **BatchFieldCreator.exe** (and all necessary supporting files) into that folder. It will also add the TNHG group to your Start > Programs menu, and add the Batch Field Creator sub-folder.

Usage

To use Batch Field Creator, you first create your ACT! By Sage database (see ACT! documentation for additional information of creating a new database.) Then, you develop a spreadsheet detailing the fields, pick-lists and/or pick-list items to be added to the database. If you will be adding fields to more than one entity (Contact, Group or Company), you should develop an individual spreadsheet for each entity where new fields will be added using Batch Field Creator.

Pick-list, Item and Field Definition Spreadsheet

One of the supporting files installed into the \TNHG\BatchFieldCreator folder is the BFC_Skeleton.xls file. Open this spreadsheet file and save it in a convenient location, using a new name (*suggestion:* store the spreadsheet in the same folder where you database is stored, and name it the same as your database, with an extension of .xls).

The spreadsheet contains three worksheets – one for field definitions, one for pick-list definitions, and one for pick-list item definitions. The pick-list definitions will be processed first, so references in the field definitions and pick-list item definitions may refer to either pre-existing pick-lists, or pick-lists to be added during the current execution of Batch Field Creatore.

Field Definition Worksheet

The worksheet holding the field definitions MUST be named “Fields” or “Sheet1”.

The first row of the worksheet contains the “column headings” - names of what is to be found in each column - along with some “tooltip” help text, explaining what values are expected and/or required.

Each row (after the first) contains the specifications for a field to be added to the database. You can leave blank rows if you wish - perhaps to help visually group and organize your new fields. Batch Field Creator will ignore the first row (expecting it to contain the column headers) and any blank row.

Column A holds the **Name** of the field to be created. (Remember that there are some fairly tight restrictions on what formulating ACT!2005 field names; please refer to the ACT!2005 documentation for more details.) Each fieldname must be unique. This entry is **mandatory**.

Column B holds the **Type** of the new field. This entry is optional, and defaults to `Character`. Valid entries are:

- **`Address`** or **`AD`** indicates an address field group
- **`Annual Event`** or **`AN`** or **`AE`** indicates an Annual Event field
- **`Character`** or **`CH`** indicates a Character field
- **`Currency`** or **`CU`** or **`$`** or **`$$`** indicates a Currency field
- **`Date`** or **`DA`** indicates a Date field

Date/Time or **DT** indicates a Date/Time field
Decimal or **DE** indicates a Decimal field
Email Address or **EM** indicates an Email Address
Initial Capitals or **IC** or **IN** indicates an Initial Caps field
Lowercase or **LC** or **LO** indicates a Lowercase field
Memo or **ME** indicates a Memo field
Number or **NU** indicates a Number field
Phone or **PH** indicates a Phone field group
Picture or **PI** indicates a Picture field
Time or **TI** indicates a Time field
Uppercase or **UC** or **UP** indicates an Uppercase field
URL Address or **UR** indicates a URL field
Yes/No or **YE** or **YN** indicates a Yes/No field

(Please refer to the ACT!2005 documentation for more information on field types and their default settings.)

Column C holds the **Length** of the field. This entry is optional, and defaults to various values, depending on the field type (as established in column B). For all text type fields (Character, Initial Caps, Lowercase, Uppercase), the default is 50. For Currency fields, the default is 16.2. For Decimal fields, the default is 13.5. For URL fields, the default is 128. When specifying a non-default value for a Character type field, Number field or URL field, specify the total length expressed as an integer (no decimal point or decimal digits - ex. 50, NOT 50.0). When specifying a non-default length for a Currency or Decimal field, use a format that provides the left-of-decimal, dot, right-of-decimal lengths, with the maximum length of 18 (ex 13.2 for total length of 15). Entries for Address, Annual Event, Date, Date/Time, Email Address, Memo, Phone, Picture, Time and Yes/No fields are ignored.

Column D indicates whether or not the field is **updatable**. This entry is optional, and defaults to True. Valid entries are: **Yes**, **No**, **True**, and **False**.

Column E indicates whether or not the field **can be blank**. This entry is optional, and defaults to True. Valid entries are: **Yes**, **No**, **True**, and **False**.

Column F indicates whether or not changes to the field value **generate history** entries. This entry is optional, and defaults to False. Valid entries are: **Yes**, **No**, **True**, and **False**.

Column G indicates whether or not the field is considered a **"primary" field**. This entry is optional, and defaults to False. Valid entries are: **Yes**, **No**, **True**, and **False**.

Column H indicates the **default value** for the field. This entry is optional, and defaults to blank for all field types except Yes/No. For Yes/No fields, the default is `No`.

Column I indicates the **type** of Field Change Trigger for the field, column K indicates the **type** of Field Entry Trigger for the field, and column M indicates the **type** of Field Exit Trigger for the field. These entries are optional, and default to `None`. Valid entries are **`Activity Series`** or **`A`** or **`AC`** or **`AS`** or **`Executable`** or **`E`** or **`EX`** or **`None`** or blank.

Column J indicates the actual Field Change Trigger, column L indicates the actual Field Entry Trigger, and column N indicates the actual Field Exit Trigger for the field. These entries are optional, and default to blank. Valid entries are blank or the text that accurately indicates the full trigger definition.

Column O indicates the name of the pre-existing Picklist to be assigned to the field. This entry is optional, and defaults to blank. Valid entries are blank or the EXACT name of the existing Picklist in the ACT! database (including spaces, special characters, upper/lower case, etc).

Column P indicates whether or not the field values will be **"limited to picklist values"**. This entry is optional, and defaults to False. Valid entries are: **`Yes`**, **`No`**, **`True`**, and **`False`**.

Column Q indicates whether or not the field is allowed to **"multi-select"** from the picklist. This entry is optional, and defaults to False. Valid entries are: **`Yes`**, **`No`**, **`True`**, and **`False`**.

Column R indicates whether or not the field is treated as **"type ahead"** for the picklist entries. This entry is optional, and defaults to False. Valid entries are: **`Yes`**, **`No`**, **`True`**, and **`False`**.

Column S indicates whether or not the picklist will **"show description"**. This entry is optional, and defaults to False. Valid entries are: **`Yes`**, **`No`**, **`True`**, and **`False`**.

Column T indicates the field "format" or "template" to be applied to values that are entered into this field. For example, if you want a SSN to be separated by hyphens, you might use "xxx-xx-xxxx". This entry is option, and defaults to blank or nothing. Consult your ACT! documentation for valid entries and formatting.

Column U indicates the default Field Level Security for ACT!2007 (ACT! v9) or later. This entry is option, and defaults to "ReadWrite". Valid entries are: **`Deny,`** **`ReadOnly`** and **`ReadWrite`**.

Once you have filled in a row for each new field, containing all the non-default values, save the spreadsheet.

Pick-list Definition Worksheet

The worksheet holding the pick-list definitions MUST be named “Picklists.

The first row of the worksheet contains the “column headings” - names of what is to be found in each column - along with some “tooltip” help text, explaining what values are expected and/or required.

Each row (after the first) contains the specifications for a pick-list to be added to the database. You can leave blank rows if you wish - perhaps to help visually group and organize your new pick-lists. Batch Field Creator will ignore the first row (expecting it to contain the column headers) and any blank row.

Column A holds the **Name** of the pick-list to be created. Each pick-list name must be unique. This entry is **mandatory**.

Column B holds the **Type** of the new pick-list. This entry is optional, and defaults to `Character`. Valid entries are:

`Character` or **`CH`** indicates a Character field
`Currency` or **`CU`** or **`$`** or **`$$`** indicates a Currency field
`Decimal` or **`DE`** indicates a Decimal field
`Number` or **`NU`** indicates a Number field

Column C holds the Description of the pick-list. This entry is optional.

Column D indicates whether or not the pick-list is **editable** by the users. This entry is optional, and defaults to True. Valid entries are: **`Yes`**, **`No`**, **`True`**, and **`False`**.

Column E indicates whether or not the pick-list is **auto-insert**. This entry is optional, and defaults to True. Valid entries are: **`Yes`**, **`No`**, **`True`**, and **`False`**.

(Please refer to the ACT!2005 documentation for more information on pick-lists and their settings.)

Once you have filled in a row for each new pick-list, containing all the non-default values, save the spreadsheet.

Pick-list Item Definition Worksheet

The worksheet holding the pick-list item definitions MUST be named “PicklistItems.

The first row of the worksheet contains the “column headings” - names of what is to be found in each column - along with some “tooltip” help text, explaining what values are expected and/or required.

Each row (after the first) contains the specifications for an item to be added to a pick-list in the database. You can leave blank rows if you wish - perhaps to help visually group and organize your new pick-list items. Batch Field Creator will ignore the first row (expecting it to contain the column headers) and any blank row.

Column A holds the **Name** of the pick-list to which the item will be added. This entry is **mandatory**.

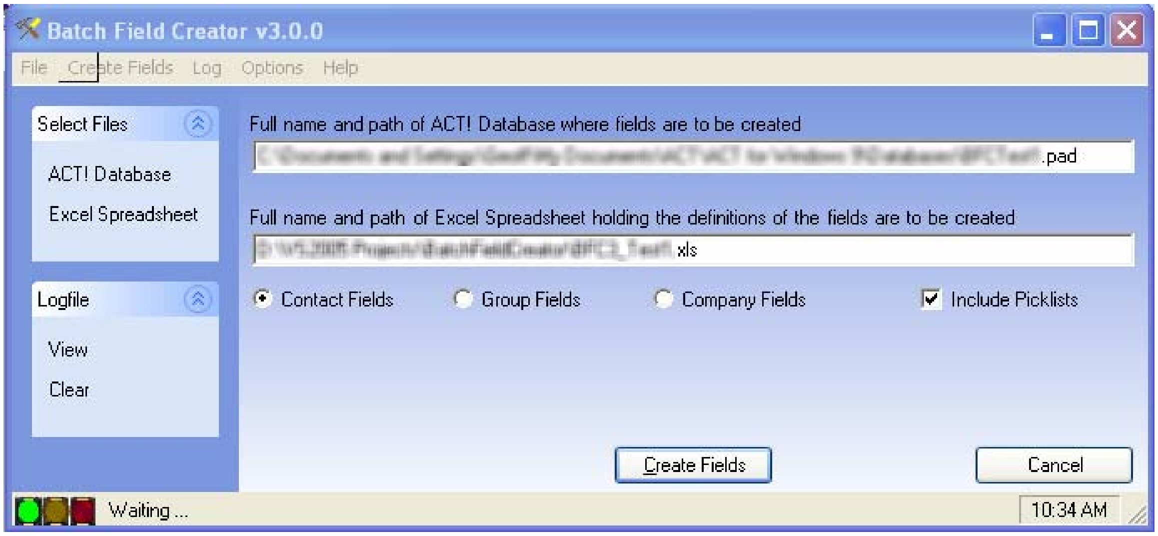
Column B holds the **Value** of the new item. This entry is **mandatory**. It is important that this column be ***formatted as “Text”***, even though it may hold numerical values.

Column C holds the Description of the pick-list. This entry is optional.

Once you have filled in a row for each new pick-list item, containing all the non-default values, save the spreadsheet.

Start Batch Field Creator

Use your windows taskbar Start button menu of programs, and select the TNHG program group and the Batch Field Creator subgroup. Select the Batch Field Creator option to start Batch Field Creator.



Use the File menu > Select ACT! Database option, or the Select File task panel > ACT! Database option, to open a standard Windows File Open dialog window. Navigate to and select the database where the fields will be defined.

Use the File menu > Select Excel Spreadsheet option, or the Select File task panel > Excel Spreadsheet option, to open a standard Windows File Open dialog window. Navigate to and select the spreadsheet holding the field specifications.

Select the entity type for the new fields: Contact, Group or Company. If you are only adding pick-lists and/or pick-list items, and not adding any fields, you may select any entity type – it will have no effect on the pick-list creation.

If you have specified pick-list and/or pick-list item definitions to be added to the database, then “check” or select the “Include Picklists” option.

Use the Create Fields menu, or the Create Fields button, to start the field creation process.

During operation, if Batch Field Creator encounters any problems with the specifications found in the spreadsheet, it makes a log entry to record that situation. In addition, a window will appear notifying you of the problem. You can toggle the Options > Show Messages option on or off the control the display of these messages. Each message will also offer you the option to “Continue and Show Messages (Yes)”, “Continue and Don’t Show Messages (No)”, or “Cancel”. Since some messages are to be expected (see below) you may want to turn them off so that you don’t have to respond to each one. You can always check the log (see below) for more information, even if you have optioned NOT to receive the messages.

One type of “problem” is when Batch Field Creator encounters a fieldname in Column A that already exists in the ACT! database. This may or may not be a “real” problem; you may have restarted Batch Field Creator, and would want it to skip those fields that had already been added during an earlier execution, or, these “duplicate” names may be a surprise to you, and cause a real problem that needs resolution. Using the message windows and the log, you should be able to isolate those situations that are real problems, and be able to resolve them quickly.

Use the Log menu > View Logfile option and the Logfile task panel > View option to display the current activity log produced as Batch Field Creator performs its functions. You can clear an old log using the Log menu > Clear Logfile option or the Logfile task panel > Clear option.

(At the time of this publication, there is a known “undocumented feature” of ACT! by Sage, wherein some internal processing must periodically take place when adding fields to the database. While the interactive Define Fields wizard handles this processing quite handily, Batch Field Creator cannot do so. Therefore, you may encounter a situation where you will need to use the ACT! tools menu > Define Field option to manually add a field, and then resume processing with Batch Field Creator. The window that appears provides the name of the field to be added in this fashion. Just start ACT!, open the database, select the Tools menu > Define Fields option, select the proper Entity type (Contact, Group or Company), and Add New Field. Add the field indicated in the error window, following the wizard to provide all non-default values, then click [Finish] and [Close]. Close the database and restart Batch Field Creator. It will “remember” the selections for database, spreadsheet and type, so you should be able to just start the Create Fields operation, and resume where things left off before encountering this “feature”. Sage Software indicates that they are planning on fixing the “feature” in some future release.)