Postcodes4Act!
Installation Guide

Revision 2.1

Postcodes4Act! User Guide Contents

What is Postcodes4Act!?

Postcodes4Act! is an AddOn for Act! that automatically inserts the State and Postcode into the contact record when you enter the suburb.

Postcodes4Act! Features

- Simple to install and easy to use

- Automatically inserts State and Postcode

- Detects change in suburb and automatically updates Postcode and State (if required)

- Allows user to select from multiple suburb choices
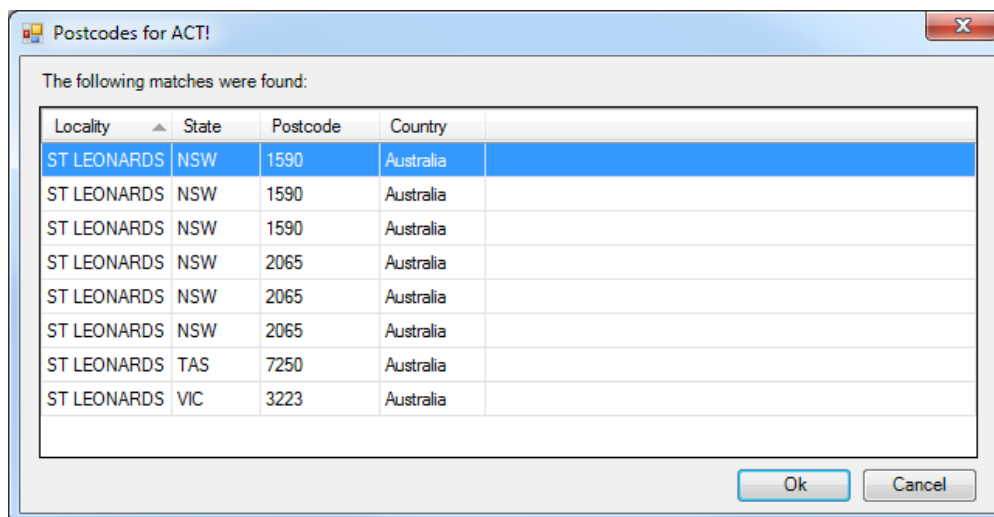
- Lookup contacts based on a postcode range

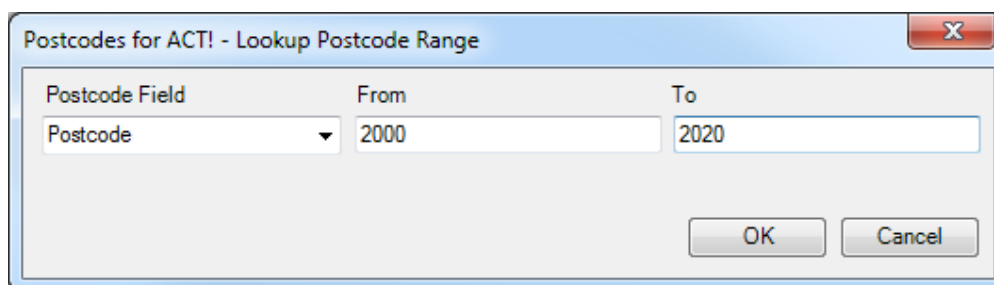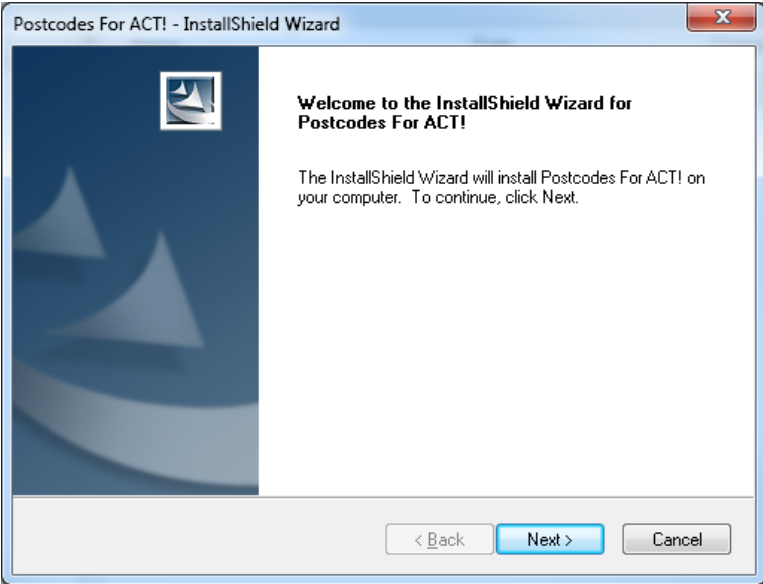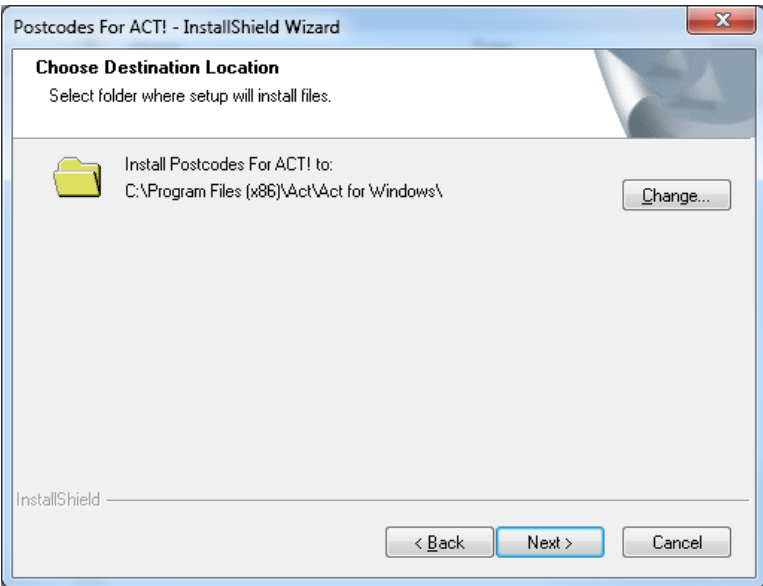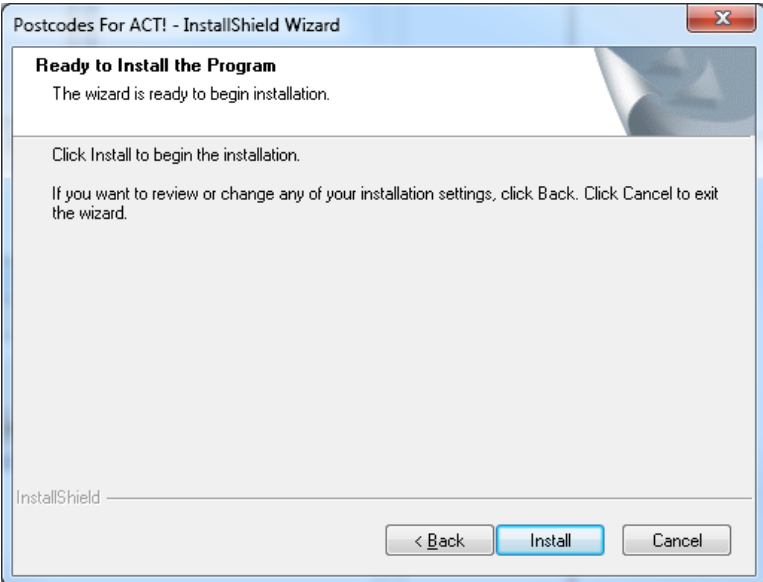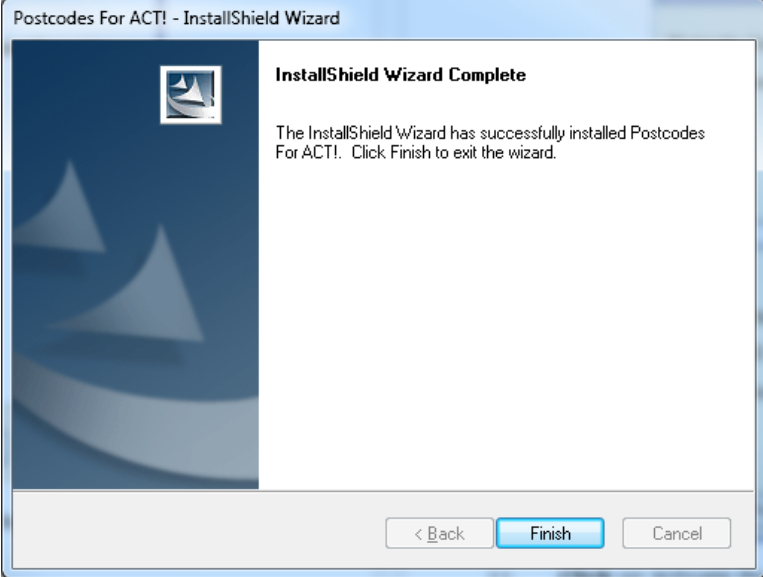**Image 1.** Select from multiple suburb matches

Image 2. Lookup contact based on a postcode range

How to Install Postcodes4Act!

To ensure an easy setup, we suggest that you read the installation instructions in full before commencing.
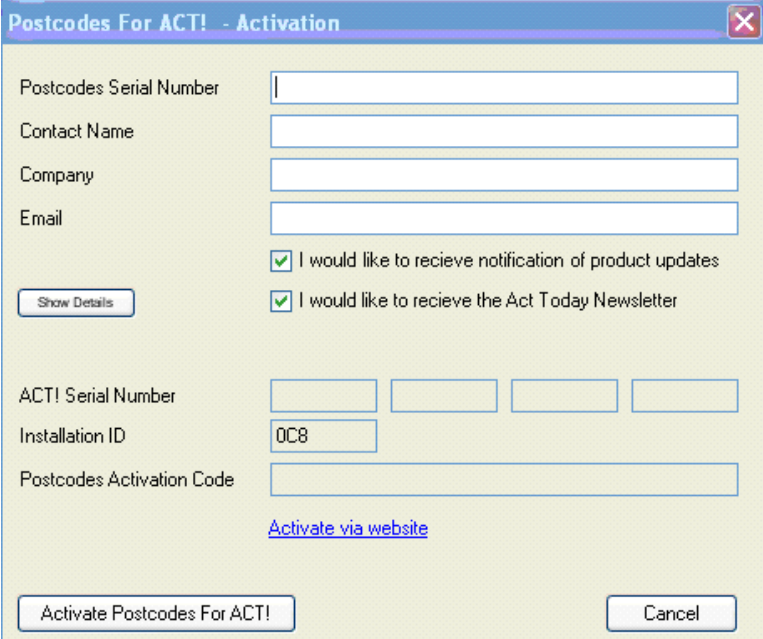
- Login to your PC as a user with Local Administrator rights

- All applications must be closed including Act!

- Download the Postcodes4Act! software applicable to your version of Act! from www.acttoday.com.au/crm-software/downloads/addons.

- Click the *Help Menu>About Act!* to confirm what version of Act! you are using.

Step	What to do	Comments
1.	Locate the *Postcodes for Act!.exe* and **double-click** to start the install	The Postcodes for Act! Installation Wizard will commence.
2.	Click **Next**	
3.	Click **Next** Note: It is suggested that you install to the default location however you can change the location if you have installed Act! to a different location.	

4.	Click **Install**	

Postcodes For ACT! - InstallShield Wizard

Ready to Install the Program
The wizard is ready to begin installation.

Click Install to begin the installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

InstallShield

< Back | Install | Cancel

5.	Click **Finish** Postcodes4Act! is installed to C:\Program Files (x86)\ACT\Act for Windows\Plugins	

Postcodes For ACT! - InstallShield Wizard

InstallShield Wizard Complete

The InstallShield Wizard has successfully installed Postcodes For ACT!. Click Finish to exit the wizard.
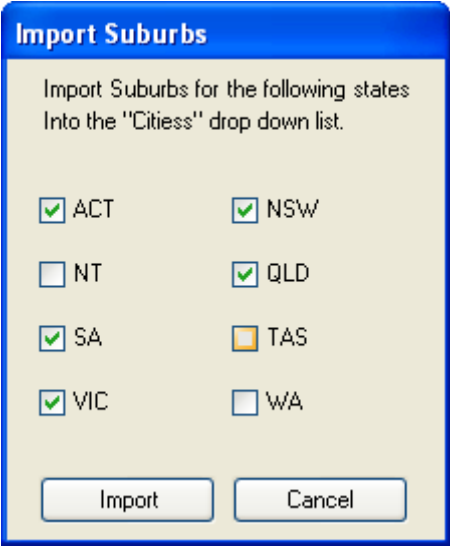
< Back | Finish | Cancel

How to Activate Postcodes4Act!

After installing Postcodes4Act!, you will have 30 days to use it before requiring you to activate a Serial Number. See acttoday.com.au/estore/ to purchase a Postcodes4Act! Serial Number.

Step	What to do	Comments
1.	**Launch** Act!	
2.	Select the **Tools** menu, select **Postcodes4Act!**, **Activate Postcodes4Act!**	**UPDATE SCREEN SHOT**
3.	**Enter** your **Postcodes Serial Number** that you have been allocated and your details.	
5.	**Click** the **Activate Postcodes4 Act!** button. If successful a confirmation will appear.	
6.	**Repeat** the Installation and Activation steps for each user	Note: A licence is required for each install. If you have purchased a multi-user licence, you will be able to use the same licence for each install.

How to Import the Suburb List

In the Postcodes4Act!.zip file, we supply you with a csv file containing a list of suburbs that you can import into the Suburb field in Act! after you have installed Postcodes4Act!

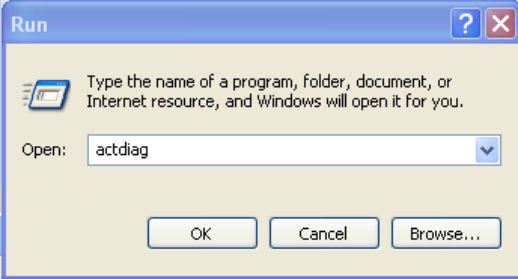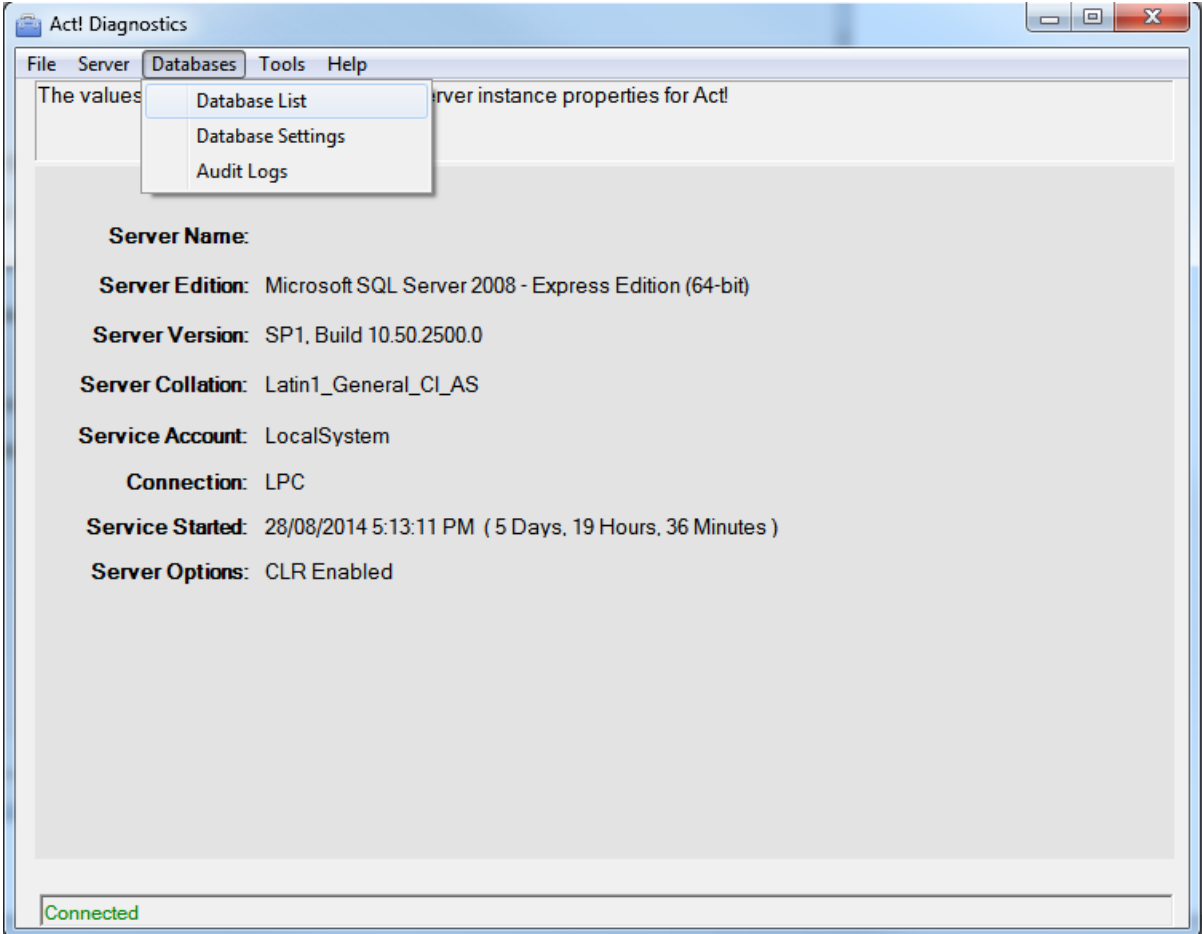| Step	What to do	Comments
1.	**Restart** Act!	
2.	Select the **Tools** menu, **Postcodes4Act!**, then **Import Suburb List**	**Import Suburbs** Import Suburbs for the following states Into the "Citiess" drop down list. ☑ ACT ☑ NSW ☐ NT ☑ QLD ☑ SA ☐ TAS ☑ VIC ☐ WA Import Cancel
3.	Select a **State** and click **Import**	We suggest that you only select one State at a time
4.	Repeat Steps 2 and 3 for each State	We suggest that you only import the suburbs for your state as there are over 16000 cities/suburbs Australia wide and a large drop down menu affects performance.

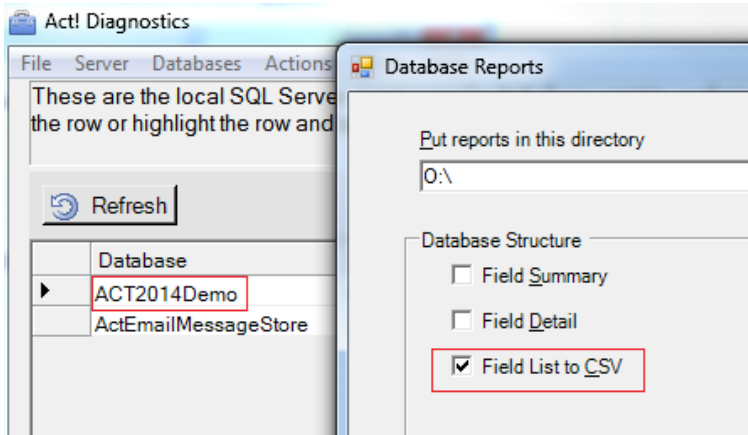## *How to Configure Postcodes4Act! for Custom Address Fields*

By default, Postcodes4Act! works with the standard address fields in Contacts, Companies and Groups. If your database is customised with additional address fields, you can configure Postcodes4Act! to operate in these fields as well.

Step	What to do	Comments
1.	Navigate to *C:\Program Files\ACT\Act for Windows\Plugins\Postcodes4Act!*	
2.	**Open** the *Postcodes4Act.ini* in notepad	You will see this file contains the standard field names # field listings are suburb field, state field, postcode field [FIELDS] TBL_CONTACT.BUSINESS_CITY, TBL_CONTACT.BUSINESS_STATE, TBL_CONTACT.BUSINESS_POSTALCODE TBL_CONTACT.HOME_CITY, TBL_CONTACT.HOME_STATE, TBL_CONTACT.HOME_POSTALCODE TBL_GROUP.BUSINESS_CITY, TBL_GROUP.BUSINESS_STATE, TBL_GROUP.BUSINESS_POSTALCODE TBL_COMPANY.BUSINESS_CITY, TBL_COMPANY.BUSINESS_STATE, TBL_COMPANY.BUSINESS_POSTALCODE TBL_COMPANY.BILLING_CITY, TBL_COMPANY.BILLING_STATE, TBL_COMPANY.BILLING_POSTALCODE TBL_COMPANY.SHIPPING_CITY, TBL_COMPANY.SHIPPING_STATE, TBL_COMPANY.SHIPPING_POSTALCODE
3.	Let say we create a new address called **'Street'** … **Copy** the first 3 lines and paste at the bottom of the list.	TBL_CONTACT.BUSINESS_CITY, TBL_CONTACT.BUSINESS_STATE, TBL_CONTACT.BUSINESS_POSTALCODE Note: For assistance in creating new fields, please speak to one of our consultants.
4.	Replace **Business** with **Street**	TBL_CONTACT.**STREET**_CITY, TBL_CONTACT. **STREET** _STATE, TBL_CONTACT. **STREET** _POSTALCODE
5.	**Save** the file and re-start Act!	

What is the SQL name of the Act! field?

If you have created new Address fields, you need the SQL name not the Act! display name. To find out the SQL name, follow the procedures below.

Step	What to do	Comments
1.	From your Desktop, go to **Start**, **Run** and type in *actdiag*, select **Enter**	 The Act! Diagnostic tool will appear.
2.	Click on the **Database** menu and select **Database List.** The Database list will appear. 	

3.	**Right-click** on your database name, select **Database Reports**, then **Field List to CSV,** and **OK**	
4.	From the list you will be able to check the actual custom field name that needs to be inserted into the ini file.	

Troubleshooting

If you have any trouble with the installation or use of Postcodes4Act!, please try the following steps prior to requesting support.

Activate Postcodes4Act! Menu is not available

In some environments, you may not be able to access the 'Activate Postcodes4Act!' menu.

Step	What to do	Comments
1.	**Close** Act!	
2.	Go to the Windows **Run** command **<CNTRL + R>**	
3.	Type in **%appdata%,** and press **Enter**	This will take you to your Windows User Profile Application Data location
4.	Navigate *to the ACT\ACT Data folder*	
5.	**Rename** the *DependentDlls.xml* file to *DependentDlls.old*	The DependentsDlls.xml file stores details on custom plugins for Act!. This file will re-create when you next launch Act!
6.	**Open** the file called *DependentDlls.xml* and rename to *DependentDlls.old*	Located in *C:\Documents and Settings\<NAME>\Application Data\ACT\Act for Windows*
7.	**Re-start** Act!	The *Activate Postcodes4Act!* menu option should now appear

Still Need Help?
If the problem persists, contact support@acttoday.com.au.
Please include the version of Act! and Windows being used and any relevant screen shots.