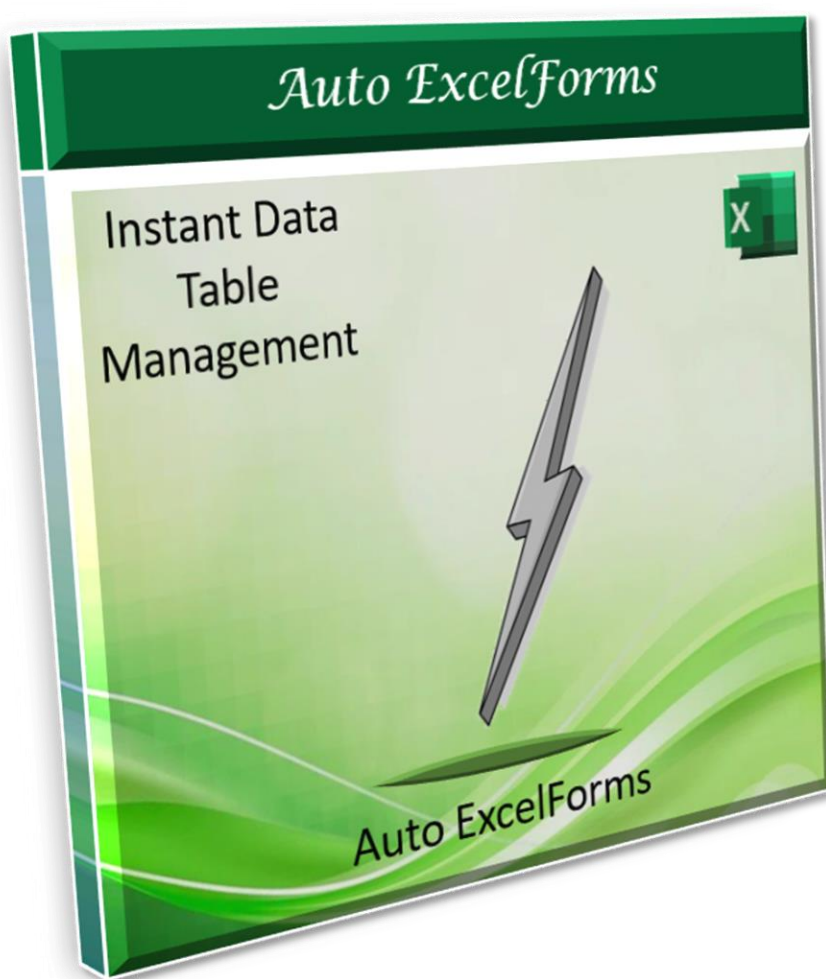




**” Instantly enter and manage data in Excel with customizable, professional-grade forms.”**



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## 2 Introduction

### 2.1 Overview

Excel isn't a database application — yet countless individuals and small businesses rely on Excel tables to store vital data. Managing, navigating, and safeguarding that data can quickly become complex.

Whether you're tracking customers, inventory, sales, or projects, AutoExcelForms helps you stay organized and accurate. This powerful add-in for Microsoft Excel (Windows and Mac) lets you create, update, search, and report on your data in just a few clicks — no coding required. If you don't need the overhead of a full Relational Database Management System (RDBMS), AutoExcelForms delivers database-like functionality without the complexity of learning a new tool like Access.

With a single click, AutoExcelForms generates professional, resizable data forms for any Excel table — and that's just the beginning. Unlike Excel's built-in data form, AutoExcelForms adds:

- Advanced search & navigation
- One-click reports & filters
- Dropdowns & relational links
- Built-in referential integrity
- UI customisation and User access control

All from a single, intuitive interface.

For power users and developers, AutoExcelForms Pro adds the ability to create fully distributable Excel workbooks with every AEF feature — including relational forms and referential integrity — so your team or clients can use your solutions without installing the add-in.

#### Single Click Userforms – Fully customizable

The screenshot displays the AutoExcelForms interface within an Excel environment. The top ribbon includes tabs for File, Home, Table Form, Insert, Draw, Page Layout, Formulas, Data, Review, View, RC, Developer, Help, Power Pivot, and Table Design. The 'Table Form' tab is active, showing options like Import Worksheets, Customise Columns, and New Starter Sheet. Below the ribbon, a data form is visible for 'E00769 Jose Kang', an Engineering Manager. The form includes fields for EID, Full Name, Job Title, Department, BizUnit, Gender, Ethnicity, Age, Hire Date, Annual Salary, Bonus %, Country, City, and Photo. A 'Record 5 of 41' status bar is shown. To the right, a data table is displayed with columns for EID, Full Name, Job Title, Department, BizUnit, Gender, and Photo. The table contains 41 records, with the first few rows visible. The interface is designed for easy navigation and data management.

## Auto ExcelForms

Create or open any Excel table—from scratch or your existing datasets—and Auto ExcelForms instantly builds an interactive form for entering, searching, and reporting data. No setup. No programming.

**From this:** (Example Random file downloaded from the internet):

WO	District	Lead Tech	Service	Rush	Req Date	Description	Work Date	Techs	Wty	Wty Parts	Lbr	Parts	Cost	Payment	Wait	Lbr Rate	Lbr Cost	Lbr Fee
A00111	South	Lopez	Repair	Yes	26-Apr-22	Rep 1 Gtx Mobile No Tx Rework/prog Loaner Port.	16-May-22	1			0.25	\$70.21	Account		20	80	\$20.00	20.00
A00119	Southeast	Khan	Repair		01-May-22	To Repair 1 Memo Express Pager Id #4998	10-May-22	2			0.50	\$120.00	Account		9	140	\$70.00	70.00
A00121	Southeast	Khan	Repair		30-Apr-22	To Repair One Memo Express Pager	15-May-22	1			1.75	\$341.00	C.O.D.		15	80	\$140.00	140.00
A00125	South	Lopez	Repair		02-May-22	To Repair Ext #13 & 17	22-May-22	1			0.50	\$37.92	Account		20	80	\$40.00	40.00
A00127	South	Lopez	Install		02-May-22	To Relocate 2 Extensions	22-May-22	1			0.25	\$202.29	Account		20	80	\$20.00	20.00
A00130	Southwest	Cartier	Repair		04-May-22	To Repair 1 Everon Numeric Pager/ Not Working	08-May-22	2			0.50	\$535.62	C.O.D.		4	140	\$70.00	70.00
A00145	Southeast	Burton	Repair		10-May-22	To Repair 1 Alphamete 250 Paging Terminal	29-May-22	1			0.25	\$6.22	C.O.D.		19	80	\$20.00	20.00
A00148	South	Lopez	Repair		10-May-22	To Install Base At Republic Bank Commerce Division	10-Jul-22	1			0.25	\$87.58	Account		61	80	\$20.00	20.00
A00155	Southeast	Burton	Repair		16-May-22	E999 Add Tobago Frequency To 4 Lts 2000 Portables	07-Jun-22	1			1.50	\$123.96	C.O.D.		22	80	\$120.00	120.00
A00157	Southeast	Khan	Repair		16-May-22	To Check & Repair 4 Radius P110 Portables-no Tx	20-Jun-22	2			0.50	\$1.17	C.O.D.		35	140	\$70.00	70.00
A00165	South	Khan	Repair		22-May-22	Rep 2 Mtx 888 Portable Radio/unit Dead 1 Fell	31-May-22	2			0.50	\$54.12	Account		9	140	\$70.00	70.00
A00175	South	Lopez	Repair		28-May-22	To Repair Base Radio. No T X No Rx	05-Jun-22	1			0.25	\$19.50	Account		8	80	\$20.00	20.00
A00176	South	Lopez	Repair		28-May-22	To Chk Repeater At Gran Couva. No Tx No Rx	05-Jun-22	1			0.25	\$22.42	Account		8	80	\$20.00	20.00
A00185	South	Lopez	Repair		30-May-22	To Program 2 Gm300 Portables	12-Jun-22	1			1.00	\$48.75	Account		13	80	\$80.00	80.00
A00186	South	Lopez	Repair		31-May-22	To Programme Add Freq On 1 Gp 300 Portable	13-Jun-22	1			0.25	\$36.43	Account		13	80	\$20.00	20.00

**To this:** (with Auto ExcelForms add-in installed) in 1 click. No programming!

Auto-Generated Data form

Auto-Updating Display of Related Table data

Whether you are a beginning Excel user or seasoned professional you will enjoy using the exceptional functionality in Auto ExcelForms. It works with Excel for Windows and Mac and includes the following core features.

## 2.2 Features

### One-Click Form Generation – No Coding

- Create dynamic, professional userforms for **any** Excel table
- Supports add, edit, delete, and navigate operations
- Automatically detects filters and stays in sync with them
- Works with protected or unprotected worksheets

### Built-In Navigation, Search, and Reporting Tools

- **Browse/Find Form** with incremental search to quickly locate records
- **Quick Report Generator** lets you choose columns and instantly print reports
- **Easy-Filter Form** builds AutoFilter or Advanced Filter conditions from a simple interface
- **Save & Retrieve Filters** lets you save frequently used filters and reapply them with one click — ideal for recurring queries like *“Installation jobs in the South”* or *“Orders over \$500 this month”*
- Optional **AutoFilter Feedback Bars** show active filters directly on your forms
- Fully supports international date formats and Excel worksheet protection

### Relational Awareness and Referential Integrity

Manage related tables such as Customers & Orders or Projects & Tasks—no configuration needed:

- Detects one-to-many relationships using Excel’s Data Model (Windows only)
- Offers a platform-independent **Relationship Manager** for manual setup (Mac & Windows)
- Adds **parent/child icons** beside related fields for contextual navigation
- Displays related records in read-only or searchable views
- Enforces referential integrity: prevents invalid keys or deletion of linked records
- Generates a complete **Relationship Report** to Excel for review
- Use the **browse/Find** form or **build 1-Click reports using columns from both the active table and any related (parent) tables**. — no VLOOKUPS or XLOOKUPS, no Power Query, and no macros required.

### Customize the Look in Seconds

Quickly tailor your forms to match your brand or personal preferences:

- Choose a **theme color**, logo (Windows only), font styles and sizes
- Control label, field, and frame colors
- Use **flat** or **sunken** entry field styles
- Set zoom level, calendar size, and week start day
- Toggle standard or color-themed message boxes
- Customize label and button placement

### Control Behavior Without Programming

Fine-tune how your forms handle data:

- Specify **required fields** and enforce non-empty values
- Automatically generate dropdown lists from table data
- Set fields to **read-only**, **number-only**, or **auto-increment**
- Define **primary key** columns and auto-increment values like ID0001 → ID0002

## Auto ExcelForms

- Renumber key columns in existing tables
- Hide selected columns from the form
- Choose to auto-commit or hold edits before navigating
- Optionally display a blank form after each new entry
- Set **default values** for new records

### Smart Defaults That Just Work

Auto ExcelForms intelligently configures forms based on your table layout:

- Automatically converts worksheet **data validation lists** into dropdowns (ComboBoxes) on the form—including support for **dependent dropdowns** (e.g., selecting a category updates the choices in a sub-category field)
- Adds a **calendar picker** for date fields
- Creates **multi-line fields** for wide columns
- Displays a **picture icon** for image file references (1 per table)
- Automatically creates **checkboxes** from dropdowns like “Yes, No” or “Complete, Incomplete”

### Built-In User Access Control

Easily restrict access to specific features based on user roles:

- Assign permissions for adding, editing, deleting, or configuring data
- Use the simple **User Access Form** to manage roles
- Once logged in, users see only the tools and commands they’re allowed to use

### Developer-Friendly Pro Features

The Pro version includes everything in the standard version, plus:

- Embed generated forms directly into the **Visual Basic Editor**
- Distribute or resell your customized workbooks with fully modifiable code
- Save time developing forms—or create solutions for clients in minutes

All settings are a click or two away—no formulas, no macros required.

Auto ExcelForms combines ease-of-use with powerful functionality—ideal for anyone who wants to take control of their Excel data.

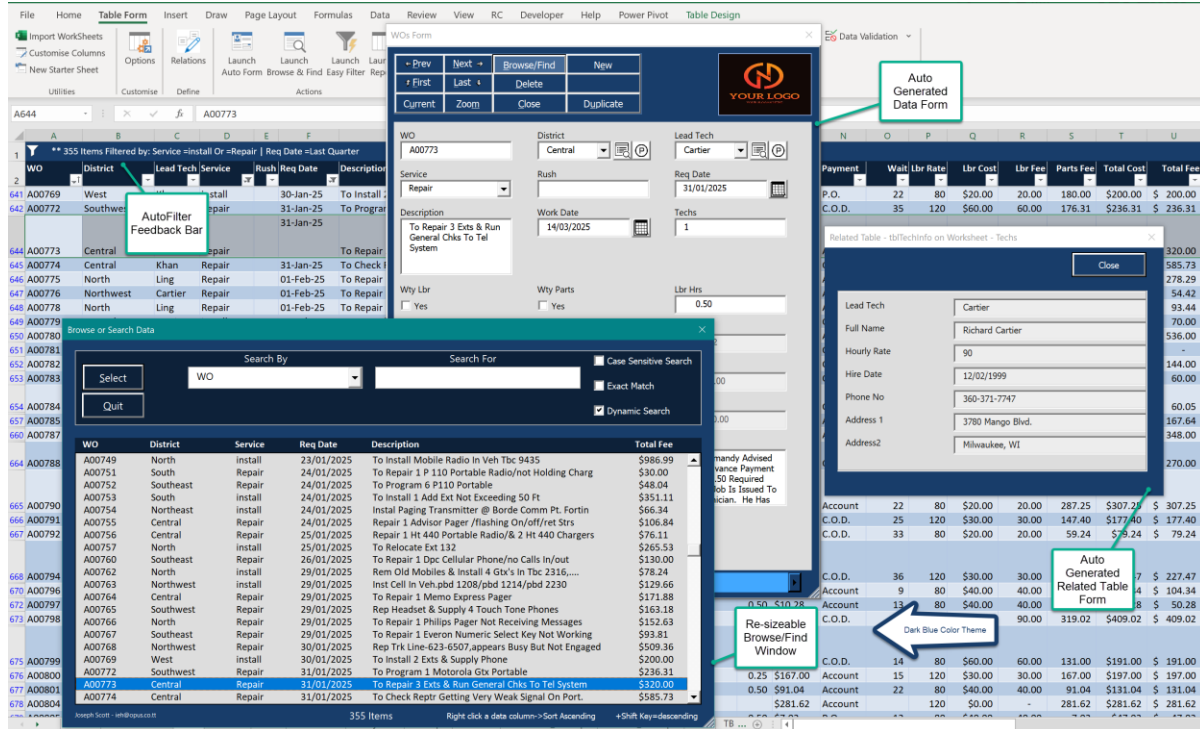
It's written entirely in VBA, with thousands of lines of code that handle all the heavy lifting—so you don't have to write any yourself.



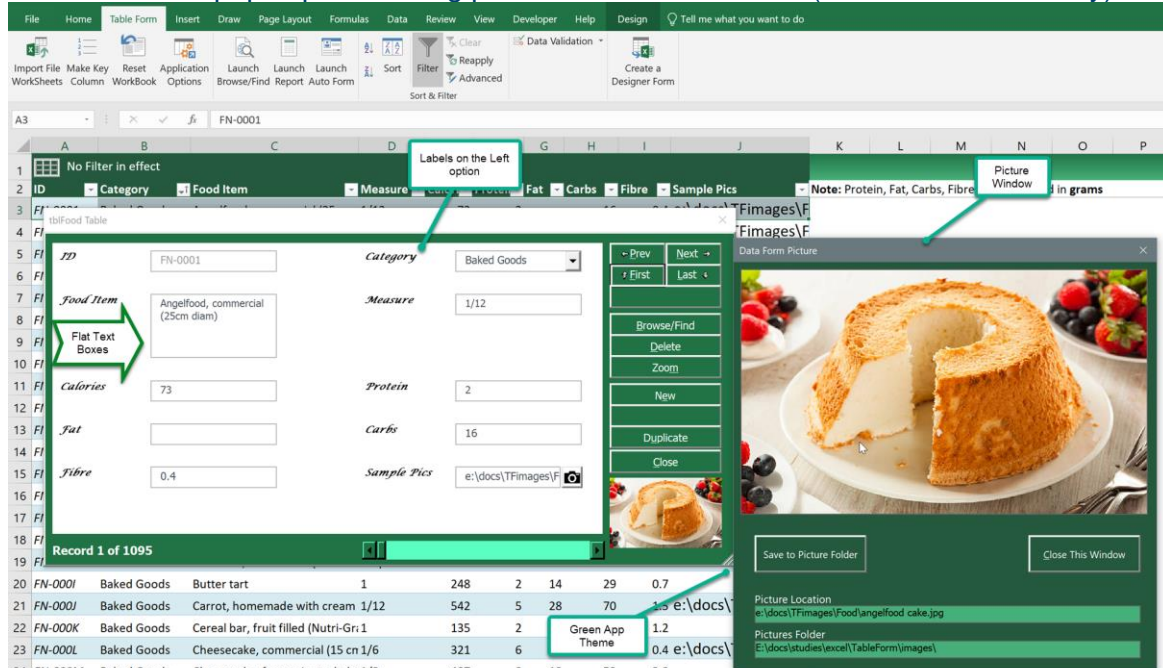
## 2.3 sample Screen shots

### 2.3.1 Sample screen shots - Auto ExcelForms (Standard version)

#### Re-sizeable Form with Related Table and Re-sizeable Browse/Find windows



#### Picture window pops up on clicking picture thumbnail on form (Windows version only)



\* Sample data in this guide is courtesy downloads from Contextures  
[www.contextures.com](http://www.contextures.com)

## Simultaneous view of Related parent and child data with custom background

The screenshot displays the Auto ExcelForms application interface. The main window, titled "orders Form", features a dark green background and contains various input fields for order details, including Orderid, Customerid, Employeeid, OrderDate, RequiredDate, ShippedDate, ShipVia, Freight, ShipName, ShipAddress, ShipCity, ShipRegion, ShipPostalCode, and ShipCountry. A navigation bar at the top of the form includes buttons for Prev, Next, Browse/Find, New, First, Last, Delete, Current, Zoom, Close, and Duplicate. The status bar at the bottom indicates "Record 4 of 831".

Two related data windows are open over the main form:

- Related Table - tblCustomers on Worksheet - customers**: This window displays customer information for the selected order. The data is as follows:

customerid	companyname	contactname	contacttitle	address	city	region	postalcode	country	phone
VICTE	Victuailles en stock	Mary Saveley	Sales Agent	2, rue du Commerce	Lyon	RJ	05454-876	Brazil	(21) 555-0091

- Related Table - tblOrderDetails on Worksheet - order\_details**: This window displays a list of order details for the selected order. It includes a search bar and a table of records.

Search By	Search For	Case Sensitive	Exact Match
orderid		<input type="checkbox"/>	<input type="checkbox"/>

orderid	productid	unitprice	quantity	discount	Product
10251	22	16.8	6	0.05	Gustaf's Knäckebröd
10251	57	15.6	15	0.05	Ravioli Angelo
10251	65	16.8	20	0	Louisiana Fiery Hot Pepper Sauce
10251	5	21.35	2	0	Chef Anton's Gumbo Mix
10251	12	38	2	0	Queso Manchego La Pastora
10251	13	6	0	0	Konbu

The status bar at the bottom of the related table window indicates "tblOrderDetails orderid - 10251" and "6 Records".

## Auto ExcelForms

### Plain old Classic Gray Form with side Labels!

File Home **Table Form** Insert Draw Page Layout Formulas Data Review View RC Developer Help Power Pivot Table Design

Import WorkSheets Customise Columns New Starter Sheet Utilities Customise Define Actions About Sort & Filter

Options Relations Launch Auto Form Browse & Find Easy Filter Report About User Permissions User Login Sort Filter Clear Reapply Advanced Data Validation

E04116

	A	B	C	D	E	F	G	H	I	
	EEID	Full Name	Job Title	Department	BizUnit	Gender	Ethnicity	Age	Hire Date	
18	E00549	Isabella Xi	Vice President	Marketing	Research & Development	Female	Asian	41	13/03/2013	
19	E00163	Bella Powell					Black	67	04/03/2002	
20	E00884	Camila Silva					Hispanic	64	01/12/2003	
21	E04116	David Barnes					Caucasian	64	03/11/2013	
22	E04625	Adam Dang					Asian	45	09/07/2002	
23	E03680	Elias Alvarado					Hispanic	56	09/01/2012	
24	E04732	Eva Rivera					Hispanic	36	02/04/2021	
25	E03484	Logan Rivera					Hispanic	59	24/05/2002	
26	E00671	Leonardo Dixon					Caucasian	37	05/09/2019	
27	E02071	Mateo Her					Asian	44	02/03/2014	
28	E02206	Jose Henderson					Black	41	17/04/2015	
29	E04545	Abigail Mejia					Hispanic	56	05/02/2005	
30	E00154	Wyatt Chin					Asian	43	07/06/2004	
31	E00126	Isabella Scott					Caucasian	58	26/04/2016	
32	E00304	Dylan Choi					Asian	63	11/05/2012	
33	E00276	Kennedy Romer					Hispanic	37	27/12/2018	
34	E00402	Dominic Guzman					Hispanic	65	16/05/2004	
35	E01994	Angel Powell					Caucasian	61	11/07/2008	
36	E03549	Mateo Vu					Asian	30	29/09/2016	
37	E03247	Caroline Jenkins					Caucasian	27	06/05/2018	
38	E02074	Nora Brown					Caucasian	32	11/02/2014	
39	E04152	Adeline Huang					Asian	34	16/12/2019	
40	E01628	Jackson Perry					Caucasian	27	20/10/2019	
41	E04285	Riley Padilla					Hispanic	35	15/05/2013	
42	E01417	Leah Pena					Hispanic	57	03/01/1994	
43	E01754	Owen Lam					Asian	30	29/05/2017	
44	E03749	Kennedy Foster					Caucasian	53	23/11/2013	
45	E03574	John Moore					Caucasian	52	08/11/2005	
46	E04600	William Vu	Account Representative	Sales	Speciality Products	Male	Asian	37	14/11/2013	
47	E00586	Sadie Washington	Sr. Manger	Marketing	Research & Development	Female	Caucasian	29	24/05/2019	
48	E03538	Gabriel Holmes	Enterprise Architect	IT	Research & Development	Male	Caucasian	40	04/11/2010	

Staff Form

◀ Prev   Next ▶   Browse/Find   New  
 ◀ First   Last ▶   Delete  
 Current   Zoom   Close   Duplicate

EEID: E04116   Full Name \*: David Barnes  
 Job Title \*: Director   Department \*: IT  
 BizUnit \*: Corporate   Gender: Male  
 Ethnicity: Caucasian   Age: 64  
 Hire Date \*: 03/11/2013   Annual Salary: \$186,503  
 Bonus %: 24%   Country: United States  
 City: Columbus   Photo:

Record 19 of 1000   Filter



## Retrieve Saved Filters

The screenshot displays the Auto ExcelForms application interface. The 'Table Form' ribbon is active, showing options like 'Options', 'Relations', 'Launch Auto Form', 'Launch Browse & Find', 'Launch Easy Filter', and 'Launch Report'. A red arrow points to the 'Launch Easy Filter' button. The 'Easy Filter Form' is open, showing a list of filters for 'TableData'. A yellow box highlights the 'Easy filter Form' label. Below it, the 'Filter Save and Retrieve Form' dialog is open, showing a list of saved filters. A yellow box highlights the 'Filter Save and Retrieve Form' label. The dialog also shows the 'Defined Filter Specifications' for the selected filter.

**Easy filter Form**

**Filter Save and Retrieve Form**

**AutoExcelForms Saved Filters for TableData**

TableName	FilterName
TableData	Cartier Lead
TableData	Ling as lead
TableData	Northeast installs or repairs for telephone systems
TableData	Portables worked on - South or West region
TableData	Northwest Jobs

**Defined Filter Specifications:**

District: Northeast  
 Service: Install or repair  
 Description: Contains telephone

## Auto ExcelForms

### Sample screen shot - Auto ExcelForms (Professional version)

#### Pro Version – modified form after a minute or two re-arranging controls in the VBE (Visual Basic Editor)

The screenshot displays the Auto ExcelForms Professional version interface. The top menu bar includes File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Developer, Help, and Design. The ribbon below the menu bar shows various formatting options like Font, Alignment, Number, and Styles. The main workspace shows a form titled 'Data Input Table' with a 'WO' (Work Order) form. The form contains fields for District (Southeast), Lead Tech (Ling), Service (Repair), Description (To Repair 1 Alphamete 250 Paging Terminal), Work Date (11/05/2022), Techs (1), Lbr Hrs (2.75), Parts (\$124.32), Lbr Rate (80), Parts Fee (124.32), Req Day (Tue), and Notes (Unit drawing down power supply and not coming on. N.B. E6 On Interface Board burnt after power supply was replaced and checks being made At South Office). The form is displayed over a background image of a server rack. The bottom status bar shows 'Record 46 of 1000'.



Auto ExcelForms **Standard** version creates highly configurable forms “on-the-fly” via a Point and click interface. If you are familiar with excel and know how to open the Visual Basic Editor, with Auto ExcelForms **Professional** version you can also save Auto Forms as actual editable forms for your workbooks in the VBE. You can then customize and distribute these ‘Designer’ forms freely to colleagues, clients or friends. *Choose windows or MAC as the destination OS.*

## 3 Getting Started

### 3.1 Start with existing data

Once installed, the easiest way to get familiar with Auto ExcelForms is to open a file with some data. Ensure that the data on the selected worksheet is formatted as a table. If not, Excel allows you to do it quite easily (Home Tab→Format as Table or Control-T).

**To create your first Auto Form: (1) click the Table Form tab then (2) click 'launch auto form.'**

The screenshot shows the Excel interface with the 'Table Form' tab selected. A red arrow labeled '1' points to the 'Table Form' tab. Another red arrow labeled '2' points to the 'Launch Auto Form' button in the 'Actions' group. The 'WOs Form' dialog box is open, displaying a form for editing a work order. The form includes fields for WO, District, Lead Tech, Service, Rush, Description, Work Date, Techs, Wty Lbr, Wty Parts, Lbr Hrs, Parts, Payment, Lbr Rate, Lbr Cost, Lbr Fee, Total Cost, Total Fee, and Notes. The dialog box also has buttons for navigation and a 'Pics' section for adding images.

That's it! Your form is ready for you to add records, browse the table, search for records or edit records.

It goes without saying that your form will be different depending on your table data. One or more special control types will appear. **These are smart Controls Based on Column Content**

Four of these are shown in the illustration:

#### A Dropdown Support with Dependency Awareness

Worksheet columns with Excel data validation lists are automatically rendered as **ComboBoxes** on the form, making data entry faster and more accurate. Supported list types include **named ranges** (e.g., =techNames), **comma-separated values** (e.g., North, South, East, West), and **cell range references** (e.g., =Lookups!\$G\$14:\$G\$20).

Even better, Auto ExcelForms preserves logic for **dependent dropdowns**: if one field's values depend on another (e.g., choosing "Fruit" updates the next list to show only Apples, Oranges, etc.), the form mirrors

that behavior automatically. Changing the parent field updates the child field's choices in real time—no extra setup required.

**B Date Columns:** Any column containing dates automatically displays a **date-picker icon** with a pop-up calendar, making date selection fast and reliable. All inputs are validated before saving.

**C Wide Columns:** Columns with long text values generate **multi-line, scrollable text boxes** to make editing easier without cutting off content.

**D Image Columns:** If a column contains references to image files (e.g., .jpg, .gif, .bmp), the form displays a **picture icon** to select or update the image path. The referenced image replaces the default logo for that row and can be enlarged with a click for better viewing.

As with most things in Auto ExcelForms these are optional behaviors that can be overridden as will be shown later.

## 3.2 Start with a clean sheet

You can start “with a clean sheet,” adding a table to a blank worksheet and then auto-generating a form to begin adding records. You can do this manually, or let Auto ExcelForms assist by creating a blank starter worksheet for you.

### To create your own table manually:

Simply type the column names on a new blank worksheet, then format the columns as an Excel table (using **Insert > Table** or **Ctrl + T**).

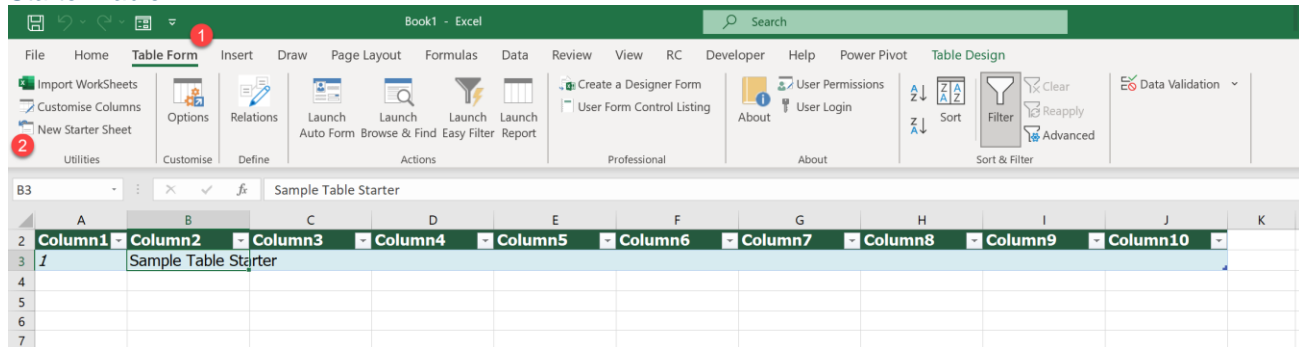
### To save time using Auto ExcelForms:

1. Click the **Table Form** tab.
2. Select **New Starter Sheet**.

Upon confirmation, a new worksheet is created with a starter table containing 10 generically named columns.

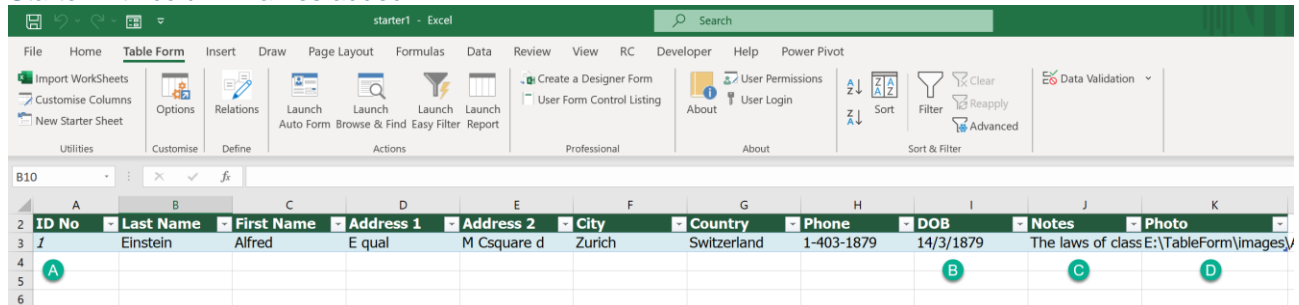
**Note:** The first column in this starter table is a special column that holds a primary key. This is described in more detail shortly.

### Starter Table



Once the “Table Starter” worksheet is generated, you **can freely add, remove, or rename columns to define your new “database” table**. For example:

### Starter with column names added



**You can now click “Launch Auto Form” to display an auto-generated data form. That’s it, you are now ready to add records via an Autoform!**

## Auto ExcelForms

In the example above, the user optionally chose to add a single record directly to the worksheet first. This allowed Auto ExcelForms to infer the type of data for each column (e.g., dates, dropdown lists) and generate special controls like date pickers and ComboBoxes automatically. This is an alternative to using column type specifiers, which are explained later.

A single record was added to the table before launching Auto ExcelForms this allowed Auto ExcelForms to interpret the column types implicitly

In this example we've seen three of these types already i.e.

**B** A table column that includes dates will auto-generate a date-picker icon with a pop-up calendar on the form. Date changes and additions will be validated.

**C** A multi-line scrollable edit box is automatically created for wide table columns

**D** A table column that has any references to picture files ( .jpg , .gif .bmp etc.) will auto-generate a picture-select icon that will allow addition of image references and at the same time will display a picture in lieu of the default "Your Logo" picture for each individual table row with image references. Clicking on this picture will pop-out a larger image window.

The result when launching the Auto Form is:

The screenshot displays the Auto ExcelForms application window, titled "Table Starter1 Form". The application is running over an Excel spreadsheet. The spreadsheet has a table with columns: ID No, Last Name, First Name, Address 1, Address 2, City, Country, Phone, Notes, and Photo. The first row of data is: 1, Einstein, Alfred, E qual, M Csquare d, Zurich, Switzerland, 1-403-1879, The laws of classical mechanics can no longer be reconciled with those of the electromagnetic field, and a picture of Albert Einstein.

The "Table Starter1 Form" window is a modal dialog box that allows editing the first record. It contains the following fields and controls:

- ID No:** A text box containing "1". A green circle with the letter "A" is next to it, indicating the Primary Key.
- Last Name:** A text box containing "Einstein".
- First Name:** A text box containing "Alfred".
- Address 1:** A text box containing "E qual".
- Address 2:** A text box containing "M Csquare d".
- City:** A text box containing "Zurich".
- Country:** A text box containing "Switzerland".
- Phone:** A text box containing "1-403-1879".
- DOB:** A date picker control showing "14/3/1879". A green circle with the letter "B" is next to it.
- Notes:** A multi-line text area containing "The laws of classical mechanics can no longer be reconciled with those of the electromagnetic field". A green circle with the letter "C" is next to it.
- Photo:** A picture-select icon showing a small image of Albert Einstein. A green circle with the letter "D" is next to it.

At the bottom of the form, it says "Record 1 of 1" and has a "Filter" button.

**A** The other feature highlighted on the form and table is the Primary Key.

### 3.3 Primary Key:

A well-structured database table should have a unique non-blank record identifier for each record/row. Such a key called a primary key can help you to identify and find records. This is a recommended practice that is supported by Auto ExcelForms.

The first table column in the *table starter* worksheet is designated as a primary key. In this case it is also an Auto-increment key that is maintained by the application. As a result:

- (i) The entry field Box on the form is disabled for user entry.
- (ii) Each new additional record added on the form by clicking “New” or “Duplicate” will increment the primary key by 1
- (iii) The corresponding (first) column on the table *restricts the user from making changes* with a warning message (see picture next page)

#### Note:

Primary keys aren’t just useful for identifying records — they also play a key role in maintaining connections between related tables. If your workbook uses multiple related tables (e.g., customers and orders, or students and courses), AutoExcelForms can use these key fields to enforce data consistency automatically. You can learn more about this powerful feature in the sections on [Working with Related Tables](#) and [Referential Integrity](#), introduced later in the guide. (Section 12)



You can add a primary key to an existing table with Auto ExcelForms under:  
Application Options - Behavior-Primary Key Setup.

Attempting to change an auto-increment Primary key on the worksheet results in an error message:

The screenshot shows the Auto ExcelForms application interface. The 'Table Form' tab is active, displaying a table with columns: Id No, Last Name, First Name, Address 1, Address 2, City, Country, and Phone. The 'Id No' column is highlighted in green, indicating it is the primary key. A red arrow points to the 'Id No' column with the text 'Primary AutoIncrement Key'. An error message dialog box is displayed, titled 'Read-Only Auto-Increment column', with the message: 'This value is automatically maintained by the pop-up form when data is added'. The dialog box has 'Retry', 'Cancel', and 'Help' buttons.

Id No	Last Name	First Name	Address 1	Address 2	City	Country	Phone
3	Einbergstein	Alphred	Eequal	Emcee	ByEmcce	Germany	1-403-197



### 3.4 Edit Data on the User Form

You can make changes that will be saved/submitted to the table by simply typing in the entry text boxes, drop-down boxes or clicking the checkboxes or icons where appropriate. Click the Save Changes button to submit changes.

You will notice there is no separate Edit or Modify button. Once you type or click anything on the form that causes the data on it to differ from what is on the corresponding table row, the *Save Changes* button becomes activated and you can click on it. The Save option disappears once there is a match between the table and the form. Later in the options section you will see how to set the option to automatically save changes on navigating to a new record, with or without a confirmation prompt. You have many choices available in terms of how the form behaves.

User Starts Typing on the form or Clicks an icon to start editing:

The screenshot displays the Auto ExcelForms interface. On the left is a data table with columns WO, District, and Lead Tech. The main area shows a user form for editing a record. The form includes various input fields and buttons. A calendar popup is open for selecting a work date. Red annotations highlight key interactions: arrow 1 points to the calendar icon, arrow 2 points to the selected date (May 4, 2022), and arrow 3 points to the 'Save Changes' button.

	WO	District	Lead Tech
2			
6	A00103	South	Lopez
14	A00111	South	Lopez
22	A00119	Southeast	Khan
24	A00121	Southeast	Khan
28	A00125	South	Lopez
30	A00127	South	Lopez
33	A00130	Southwest	Cartier
48	A00145	Southeast	Burton
51	A00148	South	Lopez
58	A00155	Southeast	Burton
60	A00157	Southeast	Khan
68	A00165	South	Khan
78	A00175	South	Lopez

In the picture example, the user clicked on the Work Date calendar icon, this caused the date selection calendar to popup, the user selected the new work date which in turn causes the Save changes button to appear. Other changes can be made as appropriate. Pressing the Save Changes button at any time will submit the form values to the table.

Any data validation rule that is violated will be highlighted. The user can go on to the next entry field but will not be allowed to update the worksheet with invalid entries.



Note that worksheet calculated (formula) fields are grayed out and disabled on the form. These are read-only and will be calculated by Excel as expected.



### 3.5 Add data using the User Form

To add data to the database table, click **New** or **Duplicate** then start entering data. Click the **Save Changes** button when finished.

Clicking on **New** will clear out all the entry boxes in preparation for a new addition. Clicking on **Duplicate** will make a copy of the current table row/User Form record. This can then be amended before saving as a new table record. This can be very useful if a user has to add a number of similar items with only slight differences, such as serial numbers.

User Clicks New Button to start adding records:

The screenshot displays the Auto ExcelForms application window. The main form, titled 'TableData Table', is overlaid on an Excel spreadsheet. The form is designed for data entry and includes the following fields and controls:

- Navigation Buttons (Right Side):** A vertical stack of buttons including 'Prev', 'Next', 'First', 'Last', 'Current', 'Browse/Find', 'Delete', 'Zoom', 'New', 'Duplicate', and 'Close'. A red circle '1' highlights the 'New' button, with a text annotation: 'Click New Button = Clear form for Data Entry'.
- Form Fields (Left Side):**
  - WO:** A text input field at the top left, highlighted with a red circle '2' and the annotation 'Begin Data Entry'.
  - District:** A dropdown menu.
  - Lead Tech:** A dropdown menu.
  - Service:** A dropdown menu.
  - Rush:** A dropdown menu.
  - Description:** A large text area.
  - Work Date:** A date picker.
  - Techs:** A text input field.
  - Req Date:** A date picker.
  - Wty Lbr:** A checkbox labeled 'Yes'.
  - Wty Parts:** A checkbox labeled 'Yes'.
  - Lbr Hrs:** A text input field.
  - Parts:** A text input field.
  - Payment:** A dropdown menu.
  - Wait:** A text input field.
  - Lbr Rate:** A text input field.
  - Lbr Cost:** A text input field.
  - Lbr Fee:** A text input field.
  - Parts Fee:** A text input field.
  - Total Cost:** A text input field.
  - Total Fee:** A text input field.
  - Req Day:** A dropdown menu.
  - Work Day:** A dropdown menu.
  - Notes:** A large text area.
  - Pics:** A text input field with a camera icon for uploading images.
- Footer:** A status bar at the bottom of the form indicates 'Record 1001 of 1001'.

The background Excel spreadsheet shows a table with columns WO, District, Lead Tech, Service, Rush, and Req, with rows 997 through 1019.

Once the user has begun entering data the **Save Changes** button appears, allowing him to submit the newly entered information when he is satisfied with it.

Note, in the illustrated form, the user chose to select a “Dark theme” to match the current Office/Excel setup. The user also elected to move the command buttons to the side, and use Flat boxes instead of sunken ones for a slightly different look. This was all done in about 3 clicks with Auto ExcelForms.

## 3.6 Reserved Rows Above the Table Header

AutoExcelForms uses two reserved rows directly above your table's header to store form settings and optional default values. You're free to use other rows (further above) for banners, titles, or notes — just keep these two rows clear for AutoExcelForms.


### 3.6.1 Spec Row (Required)

**Purpose:** Stores form and table settings (e.g., primary key flags, dropdown sources, read-only columns, layout preferences).

**Location:** The row directly above the table header.

**Behavior:**

1. If your table starts on row 1, AutoExcelForms will automatically insert this row and hide it.
2. Any merged cells or non-spec content in this row above the table will be **cleared or unmerged**.
3. Users typically won't need to edit this row manually.

 **Important:** Don't place captions, labels, or other content directly above your table header. This row is reserved for AutoExcelForms and will be overwritten.

### 3.6.2 Default Values Row (Optional)


**Purpose:** Supplies default values for new records added through the userform.

**Location:** Two rows above the table header.

**Behavior:**

1. Place constants (e.g., "Northwest") or formulas (e.g., `=TODAY()`) here to prefill form fields for new entries.
2. If you accidentally type something here, AutoExcelForms will treat it as a default value, which can cause confusion.

This row can be created/accessed using [Page 3 on the Options form](#).

 **Tip:** This row is optional and safe to use intentionally for repetitive data entry defaults.

### 3.6.3 Using Other Rows Above the Table

You're welcome to use additional rows above these two reserved rows for banners, titles, instructions, or spacing.

## 4 Data Form Components

The main parts of an auto-generated form and their details will be described in this section.

### 4.1 Overall Layout – Data Form Main Sections

The screenshot shows the 'WOs Form' dialog box with the following components highlighted by numbered callouts:

- Command button group:** A set of buttons for navigating and manipulating the database table, including Prev, Next, Browse/Find, New, First, Last, Delete, Current, Zoom, Close, and Duplicate.
- Image thumbnail:** A small image showing a satellite dish, representing the default logo or active row picture.
- Main data frame:** The central area containing all data form controls, including text boxes, dropdowns, and checkboxes for fields like WO \*, District \*, Lead Tech, Service \*, Rush, Req Date \*, Description \*, Work Date, Techs, Wty Lbr, Wty Parts, Lbr Hrs, Parts, Payment, Wait, Lbr Rate, Lbr Cost, Lbr Fee, Parts Fee, Total Cost, Total Fee, Req Day, Work Day, and Notes.
- Record counter:** A label indicating the current record number and total records, showing 'Record 4 of 1002'.
- Launch Filter Form Button:** A button labeled 'Filter' used to launch the filter form.
- Data scrollbar:** A horizontal scrollbar used to navigate through the data records.
- Form re-sizer:** A small icon in the bottom right corner used to resize the form.

1. The command button group is a button menu that will allow the user to navigate, search and manipulate the database table.
2. The Image thumbnail shows the default logo or active row picture (Windows OS)
3. The main data frame contains all the data form controls such as text boxes
4. The record counter
5. The Launch Filter Form Button
6. The data scrollbar
7. The form re-sizer

## 4.2 The Command Button Group

The individual command buttons

← <u>P</u> rev	<u>N</u> ext →	<u>B</u> rowse/Find	<u>N</u> ew
↑ <u>F</u> irst	<u>L</u> ast ↓	<u>D</u> elete	<u>S</u> ave Changes
<u>C</u> urrent	<u>Z</u> oom	<u>C</u> lose	<u>D</u> uplicate

### 4.2.1 Navigating the Form

Auto ExcelForms includes several navigation tools to help you move through your data with ease.

#### Navigate Using the Form Buttons

- **Prev** and **Next**: Move to the previous or next *visible* record in the table.
- **First** and **Last**: Jump to the first or last *visible* record.
- **Current**: If your table includes a date column, this button appears. It automatically scrolls to the first record in the current month, based on the first date column detected.

#### Visibility and Navigation Behavior

Unlike many userform solutions—including Excel’s built-in data form—**Auto ExcelForms fully respects Excel’s filtering**. Navigation occurs only within the filtered (i.e., visible) records. This includes both AutoFilter and Advanced Filter results. There’s no need to apply special filter settings within the form—it **stays in sync with Excel’s filters automatically**.

#### Keyboard Access

- Navigation buttons highlight when hovered over.
- Each button has a keyboard shortcut via Alt + underlined letter (e.g., Alt + L for **Last**).



Immediately after any navigation action, you can:  
 Use the Up and Down Arrow keys to scroll one record at a time.  
 Use Page Up and Page Down to scroll by ten records.

## 4.2.2 Zoom Function

Users can click the **Zoom** button to obtain a full-screen view of the form. The entire Excel application including the table is obscured. The Form itself is also magnified, to an extent defined in the settings option. Once zoomed in, the **Zoom** button changes to **Zoom Out**, which will revert the form to normal when pressed.

Zoomed in AutoForm Examples ( 3072x1920 screen resolution)

**Zoomed in Screen**  
All functions are the same as in Normal mode, except form re-sizing is not available.

**Picture Thumbnail was clicked**

**Zoomed in Screen**  
All functions are the same as in Normal mode, except form re-sizing is not available.

**Optional Row Dividers were added**

**Side Buttons Option**

**Zoomed in Screen**  
All functions are the same as in Normal mode, except form re-sizing is not available.

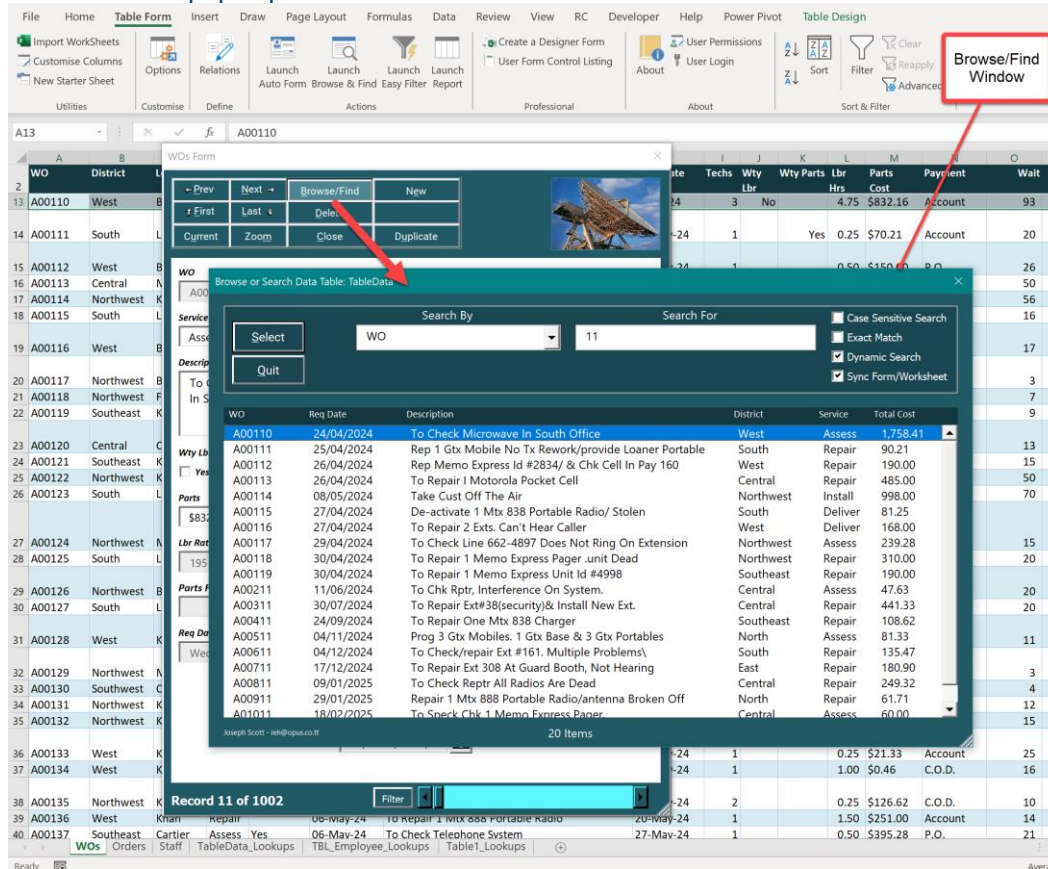
### 4.2.3 Delete Function

Click the **Delete** button to remove the table row that is currently displayed on the form. The user will be prompted for confirmation before actual deletion occurs

### 4.2.4 Browse Function

Clicking the Browse button will open up the Browse/Find window. This will allow the user to find table records and will be described in another section ([Browse/Find Window](#)).

Browse Button pops up the Browse/Find window



### 4.2.5 New and Duplicate Functions

These were covered in the “Getting Started” section.

Clicking on the **New** button will present a blank form for adding new data.

Clicking on the **Duplicate** button will create a copy of the currently displayed table record for modification and adding to the database table.

When satisfied the user will click the **Save Changes** button.

Depending on an option in the “Application Options” setup the user may first be prompted to confirm changes before they are submitted.

#### 4.2.6 Close Function

Clicking on the ***C*lose** button will cause the User form to be closed. Please note that any pending edits won't be saved.



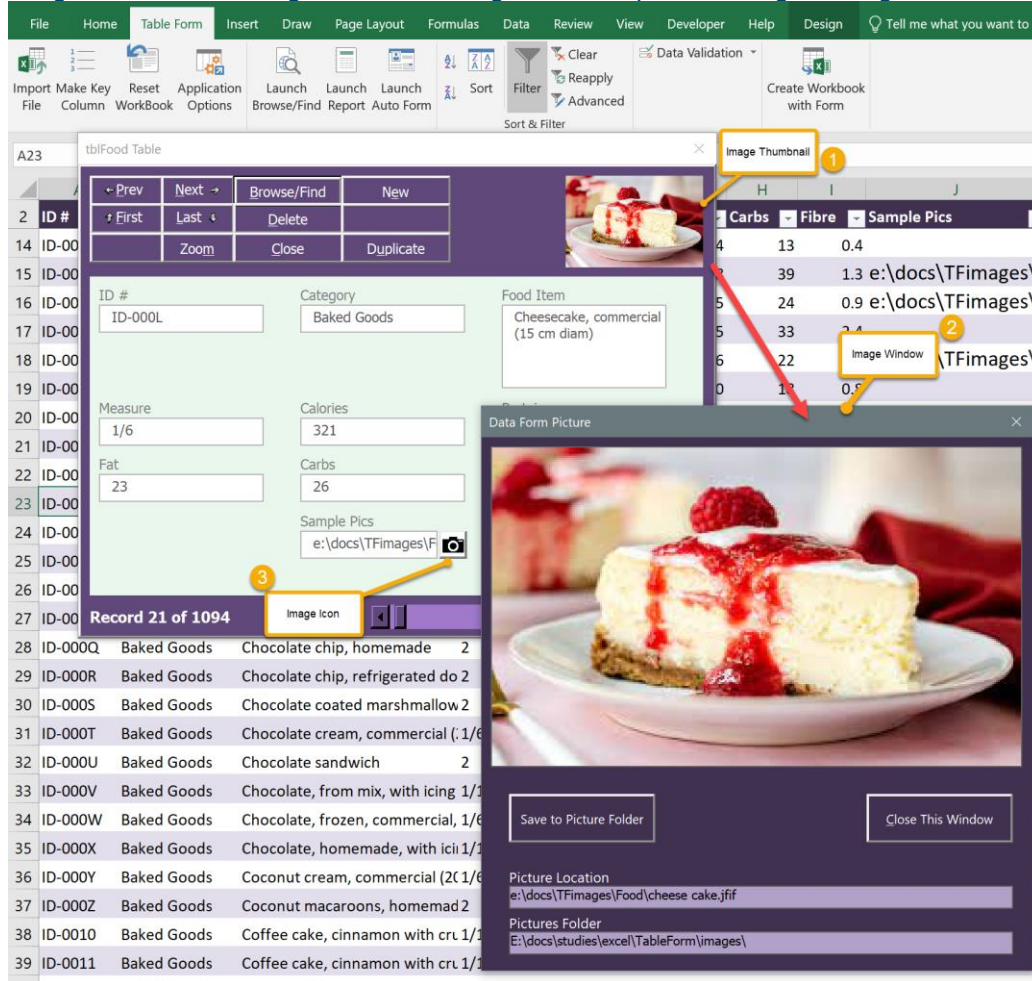
The User Form can be closed by (1) Clicking the Close button, (2) clicking the x at the top right of the form or (3) Pressing the Escape key



### 4.3 Image Thumbnail, Image icon and Image window (Windows OS)

Auto ExcelForms supports image handling through a combination of image thumbnails, image icons, and a popup image window. These features work together to provide visual context and allow users to assign or preview image files linked to table records.

Image Thumbnails, Image icons and Image windows provide image management in Auto ExcelForms.



#### Image Thumbnail <sup>1</sup>

The image thumbnail is located near the menu buttons at the top of the form. It initially displays a default logo or placeholder image. If the table associated with the form includes a **picture column**—i.e., a column that stores references to image files such as .jpg, .bmp, or .gif—the thumbnail will automatically update as the user navigates between records, showing the image linked to the current row.

- The reference to the image is stored as a **full file path** in the table row.
- If the file is **missing or invalid**, the thumbnail displays the **default image** instead.
- This default image path can be set (or cleared) in the **Options Form**. If no default is set and the image reference is invalid, the thumbnail area remains blank.
- Clicking the thumbnail opens the **Image Window**, displaying a larger version of the image for easier viewing.



### Image Icon <sup>3</sup>

If a picture column is detected in the table, a small **image icon** will appear next to the corresponding text box on the form.

- Clicking the image icon opens a **file picker dialog**, allowing the user to browse and select an image file.
- Upon selection of a valid image file, the full path is stored in the table row, the text box is updated, and the thumbnail refreshes to display the chosen image.
- This process works similarly to updating any standard text field, with the image path submitted to the table during save operations.

### Image Window <sup>2</sup>

The **Image Window** provides a larger preview of the image referenced in the current row. It can be opened by clicking the image thumbnail at the top of the form.

- The window will only display if a valid image file is associated with the current row.
- If no valid image is found, or if the image column is empty, the window will either show the default image (if one is set) or remain blank.

## 4.4 The Record Counter

The record counter, located at the lower left section of the user form provides visual feedback of:

- The number of records in the data table
- The position of the current record
- The filtered status of the table

Once again it must be remembered that the number and position are in relation to **visible or filtered records only**. For example, in the second situation below, record 1 is the first visible record in the table.

Record counter in an unfiltered table

**Record 12 of 8399**

Record counter in same table with a filter

**Record 1 of 3071 < Filtered >**



When the user clicks on the record counter, the table filtered status is shown

Example of Optional Theme colored Auto ExcelForms Message box

The screenshot shows a message box titled "Table Filter Status" with an information icon and the text: "\*\* 3071 Items Filtered by: Region =Atlantic Or West". Below the message box is the record counter: "Record 1 of 3071 < Filtered >". A red arrow points from the record counter to the message box. A yellow callout box with an arrow pointing to the message box contains the text: "Clicking Record counter reveals filter information". Another yellow callout box with an arrow pointing to the record counter contains the text: "Optional Auto TableForms Message Box".

Regular Office Message Box

The screenshot shows a regular office message box titled "Table Filter Status" with an information icon and the text: "\*\* 3071 Items Filtered by: Region =Atlantic Or West". Below the message box is the record counter: "Record 1 of 3071 < Filtered >". A red arrow points from the record counter to the message box. The background shows a form with fields for "Product Name" (Avery 506) and "Ship Date" (13/11/2012).

## 4.5 The Data Scrollbar

The data scrollbar can be used to navigate the data table.

- Click on the arrow buttons to advance or go back 1 record at a time.
- Drag the scroll thumb (scroll box) to smoothly move between the first and last records.
- Click the region along the scroll shaft to advance or go back 10 records at a time.



## 4.6 The Form Resizer

Click on the re-sizer icon and drag to expand the form horizontally, vertically or both.

Note, there is no magnification done. This is more or less equivalent to a stretching effect.

tblFood Table

← Prev	Next →	Browse/Find	New
↑ First	Last ↓	Delete	
	Zoom	Close	Duplicate

ID	FN-0007	Category	Baked Goods
Food Item	Banana bread, homemade (11cm X 6cm X 1cm)	Measure	1 slice
Calories	196	Protein	3
Fat	6	Carbs	33
Fibre	0.7	Sample Pics	e:\docs\TFimages\F

Record 7 of 1095

Form Resizer

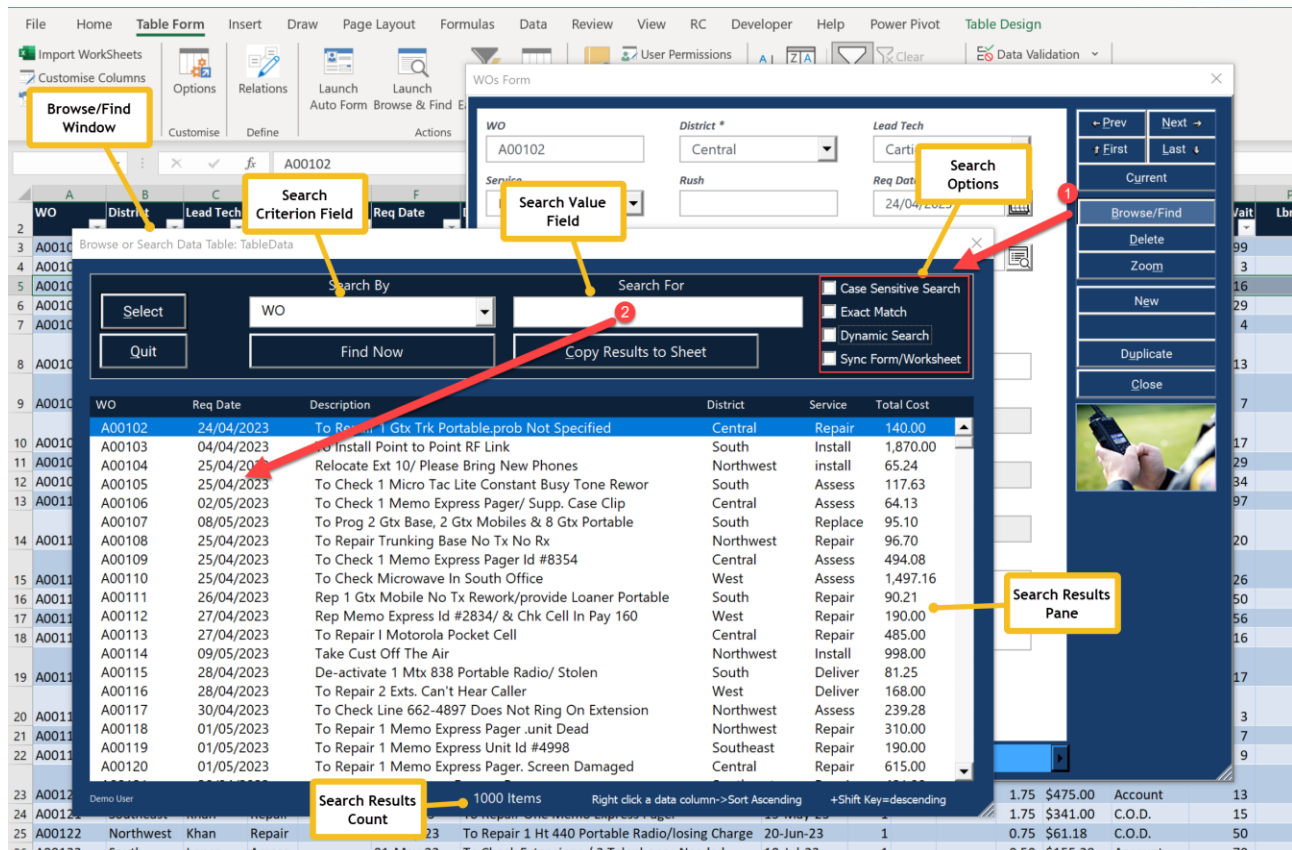
Once a form's size has been changed appreciably, Auto ExcelForms will "remember" the form position and size for each worksheet. **The easiest way to reset the default size is to click Zoom, then close the form.**

## 5 The Browse/Find window

The Browse/Find window can be accessed either from the Excel Ribbon menu or from the user form command button group.

From this window you can quickly and easily scroll through or find data.

### 5.1 Window Components



The main Browse/Find window parts are:

- Search Criterion Box – lets you choose which column(s) to search
- Search Value Box – where you enter what you're looking for
- Search Options – adjust how the search behaves
- Search Results Pane – displays matching records
- Search Results Count – shows how many matches were found
- Find Now Button – used only when dynamic search is off

By default, the search results pane shows the first six columns of the table. This can be customized under Select Browse Headers under Application Options. Column widths in the results pane match the proportions of the original table.

The **Search By** criterion drop-down allows you to pick any individual column, or choose "All Columns" for a broad search within the displayed columns.

## 5.2 Finding Records

To begin Searching for records simply start typing in the search value field. As you type, the results narrow further and are displayed in the Results pane. If *Dynamic Search* is **off**, you'll need to click **Find Now** to trigger the search.

**Note:** The Browse/Find window respects any filters already applied to the table — searches only apply to *visible* records

You can change the search criterion at any time using the drop-down menu. Once the desired record appears, you can:

- Hit **Enter**, or
- **Double-click** the record in the results pane, or
- Click the **Select button**

This will close the window and select the highlighted row.



If as you type in the Search value box, there is only 1 result in the results pane, then immediately hitting enter will close the window and make the selection without clicking or tabbing to the results pane. If there is more than one result, hitting enter will move focus to the results pane.

If the window was called from the User form, the form boxes are updated with the values from the selected table row. If the window was called from the worksheet (via the ribbon menu) then the table row is selected in the worksheet itself.

If the search value box has any characters already typed, you can hit the Esc key to clear the search value box and enter a new search. If the Esc key is hit with no characters in the box, the window will be closed.

## 5.3 Search Options

There are four optional settings that affect search behavior:

- **Case-Sensitive Search**
- **Exact Match**
- **Dynamic Search**
- **Sync Form/Worksheet**

Here's how they affect results. Suppose the search field is **Region**, and your data includes entries like "East", "Northeast", "Southeast":

You Type	Case Sensitive	Exact Match	Results
<b>East</b>	Off	Off	East, Northeast, Southeast
<b>East</b>	Off	On	East
<b>east</b>	On	Any	No records
<b>east</b>	Off	Off	East, Northeast, Southeast
<b>east</b>	Off	On	East

Like many things in Auto ExcelForms, Using the Browse/Find window is more intuitive and easier to do than it is to explain!!

As mentioned previously, with **dynamic search** turned off, the search is not narrowed as you type, and you must click the **"Find Now"** button to look for an item after entering the search value.

With **Sync Form/Worksheet** option **On**, the userform and worksheet will respond to navigation in the Browse window. With it off record selection occurs on clicking the select button or closing the Browser.

## 5.4 Sort the Browse Window and Table

Sorting from within the Browse/Find window affects not just the visible search results, but the entire underlying table. You can sort by any column shown in the results pane, and your chosen sort order—ascending or descending—will be applied to the full dataset after confirmation.

To sort a column in **ascending** order, right-click on any value within that column.

To sort in **descending** order, hold the **Shift** key while right-clicking the value.



**Note:** When you initiate a sort, you will be prompted to confirm the action. For example, if you right-click the column titled *Service date* while holding **Shift**, you'll see a prompt like:  
*"Sort on Service date in Descending order?"*  
 The sort is only applied if you click **"Yes"**.

### For Mac OS:

To sort in ascending order, hold the **Control** key and click on a value in the desired column.

To sort in descending order, hold both the **Control** and **Shift** keys while clicking.

As on Windows, a confirmation prompt will appear before the sort is applied.

## 5.5 Browsing Columns from Related Tables

You can include columns from related (parent) tables in the Browse/Find window — no VLOOKUPs, XLOOKUPs, or macros required.

For example, while browsing the Orders table, you can add columns like *Customer.CompanyName* or *Salesperson.LastName* — even though those fields reside in other tables. AutoExcelForms automatically detects relationships and makes these columns available in the Browse/Find setup (see “Select Browse/Find Headers”).

Related columns appear with headers like *RelatedTable.ColumnName*, and the browse window displays these headings in a different color.

These related fields work like any others:

- You can select them in the Search by dropdown and filter as you type.
- Right-clicking a related column will sort the results pane only, since related data cannot be used to sort the original worksheet table.

### Browsing columns from related tables

The screenshot shows the AutoExcelForms interface with the 'Browse Columns from Data Table' window open. The window displays a list of columns from the 'tblCustomers' and 'tblEmployees' tables. The 'Search By' dropdown is set to 'orderid'. The 'Search For' field is empty. The 'Dynamic Search' checkbox is checked. The 'Browse includes Columns from Related Tables' label points to the 'tblCustomers.companyname' and 'tblEmployees.lastname' columns. The 'Browse Columns from Data Table' label points to the 'orderid' and 'orderdate' columns.

orderid	customerid	employeeid	orderdate	requireddate	shippeddate	shipvia	freight	shipaddress	shipcity	shippostalcode	shipcountry
10248	VINET	5	01-Apr-22	28-Aug-22	10-Jul-22	3	32.38	59 rue de l'Abbaye	Reims	51100	France
10263			17/07/2022								
10264			18/07/2022								
10265			19/07/2022								
10266			20/07/2022								
10267			23/07/2022								
10268			24/07/2022								
10269			25/07/2022								
10270			26/07/2022								
10271			26/07/2022								
10272			27/07/2022								
10273			30/07/2022								
10274			31/07/2022								
10275			01/08/2022								
10276			02/08/2022								
10277			03/08/2022								
10278			06/08/2022								
10279			07/08/2022								
10280			08/08/2022								
10281			08/08/2022								
10282			09/08/2022								
10274	VINET	6	31-Jul-22	28-Aug-22	10-Aug-22	1	6.01	59 rue de l'Abbaye	Reims	51100	France
10275	MAGAA	1	01-Aug-22	29-Aug-22	03-Aug-22	1	26.93	Via Ludovico il Moro	Bergamo	24100	Italy
10276	TORTU	8	02-Aug-22	16-Aug-22	08-Aug-22	3	13.84	Avda. Azteca 123	México D.F.	05033	Mexico
10277	MORGK	2	03-Aug-22	31-Aug-22	07-Aug-22	3	125.77	Heerstr. 22	Leipzig	04179	Germany

## 5.6 Copy Results to Sheet

Clicking the **Copy Results to Sheet** button prompts you to select a destination cell within the current workbook. Once the target cell is selected, the filtered contents of the Browse window are copied to that location, including the corresponding column headers.

If the copied data would overlap existing content, you will be alerted before proceeding. Copying is not permitted if the data would:

- Overlap an existing Excel Table, or
- Be pasted onto the source (Browse) worksheet itself



## 6 The Filter Feedback Bar

If enabled, the filter feedback bar provides visual feedback of any Excel Autofilter applied to individual columns for the data table on the current sheet. If an advanced filter is in effect, it will simply display <Advanced Filter>.

Example Auto ExcelForms filter feedback bar

The screenshot shows the Auto ExcelForms interface with the Filter Feedback Bar. The bar is located above the data table and displays the filter criteria: District = South, Southeast, Southwest | Service = install Or Repair | Req Date = Last Quarter. The bar is highlighted with a red box and a yellow callout labeled "Filter Feedback Bar".

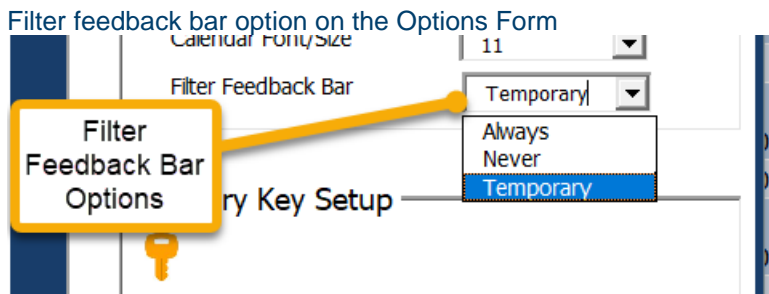
WO	District	TableData Table	Work Date	Techs
739 A00836	Southeast		04-Feb-23	2
741 A00838	Southeast		04-Feb-23	1
757	th		05-Mar-23	1
759	theast		30-Jan-23	1
763 A00860	Southeast		14-Feb-23	1
770 A00867	Southeast		16-Mar-23	2
780 A00877	Southeast		20-Feb-23	1
783 A00880	South		27-Feb-23	1
786 A00883	South		31-Jan-23	1
788 A00885	Southeast		14-Feb-23	1
789 A00886	Southeast		18-Feb-23	1
800 A00897	Southeast		06-Mar-23	1
806 A00903	South		12-Feb-23	1
807 A00904	South		12-Feb-23	1
810 A00907	Southeast		04-Mar-23	1
811 A00908	South		04-Mar-23	2

The filter bar is located exactly 1-row above the table header. If the table is located at Row 1 then a row is automatically inserted to make room for the bar.

## 6.1 Feedback Bar Options

The feedback bar is hidden when not in use and is visible depending on the application option. There are three options for this and they are:

- Temporary
- Always
- Never



With the **“Never”** option, filter feedback bars will not be added or displayed.

With the **“Temporary”** option, a feedback bar will appear when the data form is opened then removed when the form is closed.

With the **“Always”** option a *feedback bar will appear on any selected worksheet that has a table* whether there is a Form on display or not. These bars will be removed by setting the option to temporary or Never.

All feedback bars can also be removed In the Application Options form. (Actions – Remove All Filter Feedback Bars)

## 7 The Easy Filter Form

If you're familiar with Excel's drop-down filters (AutoFilters) and Advanced Filters, Auto ExcelForms will respect any filter in place—filtered rows remain hidden from view on any generated forms or windows. You can also launch the **Easy Filter Form**, a built-in tool offering a simple interface to define filter conditions. It resembles the data entry form and allows users to type criteria directly into fields representing table columns. Auto ExcelForms then applies these constraints seamlessly.

Despite its simplicity, the Easy Filter Form supports a powerful range of filtering techniques.

### 7.1 Basic Filters

You can enter straightforward expressions for common filtering needs.

For example, in a movie collection, enter:

- **Genre:** Documentary
- **Duration (minutes):** <=90  
to list documentaries that are 90 minutes or shorter.

Click **Launch Easy Filter** (or click the **Filter** button on any open form), enter criteria, then click **Set**. Filters apply immediately. Use the **Clear** button to remove filters, or **Quit** to close the form.

#### Simple Filter Form Example

The screenshot displays the Auto ExcelForms application interface. The 'Table Form' ribbon is selected, and the 'Filter' button is highlighted with a red arrow and a red circle labeled '1'. The 'MovieDatabase Filter Form' dialog box is open, showing filter criteria for 'Runtime' (≤90) and 'Genre' (Documentary). The dialog box has a title bar, a close button, and instructions: 'Input the filters you want to apply for one or more table columns. Then click Set when satisfied.' It includes fields for 'Nr.', 'Link', 'Year', 'Title', 'Runtime', 'Genre', 'MPAA', and 'Notes'. The 'Runtime' field contains '<=90' and is marked with a red circle labeled '2'. The 'Genre' dropdown is set to 'Documentary'. Buttons for 'Copy Results to Sheet', 'Set', 'Clear', 'Save-Retrieve', and 'Quit' are visible. At the bottom, there are radio buttons for 'Force Advanced Filter' and 'Use AutoFilter if possible'. The background shows a table of movie data with columns: Nr., Link, Year, Title, Runtime, Genre, MPAA, and Notes. The table is filtered to show 19 items.

**Note:** You can choose AutoFilter or Advanced Filter as your default mechanism. Advanced Filters are faster for large datasets, but their limitation is that the Filter Feedback Bar won't show details of filters in effect.

## 7.2 More Complex Filters

You can enter rich criteria using special syntax. Examples:

Syntax	Meaning
Item1	Column contains Item1 exactly
item1*	Column starts with item1
*item1	Column ends with item1
*item1*	Column contains item1
<item1	Column value is less than item1
>=item1	Column value is greater than or equal to item1
<>item1	Column value is not item1
Item1+Item2+...	Column matches Item1 OR Item2 OR Item3
item1&item2	Column contains both item1 AND item2
item1:item2	Column value lies between item1 and item2 (inclusive)
=	Field is blank
<>	Field is not blank
#	Starts a formula-based filter (evaluates to TRUE/FALSE)

By default, column filters are combined using **AND** logic.  
To apply **OR** logic between columns, prefix a field with +

### 7.2.1 Formula Mode

You can enter formulas by starting with #, in any unused box on the form. These must:

1. Evaluate to TRUE or FALSE
2. Reference the **first row of data** (e.g., D3, F3, etc.)

**Example:**

To filter by profit margin over 20%, where sales data is in G3 and profit in K3, use:  
#K3/G3 > 20%

To use named ranges, prefix them with \ (Auto ExcelForms replaces this with the active workbook name behind the scenes).

**Example:**

Filter records by new employee names in a named range newEmployees:

#COUNTIF(\newEmployees, E4)>0

Exclude those employees:

#COUNTIF(\newEmployees, E4)=0

These conditions can combine with standard ones. For example, type north+east+central in the **Region** box in addition to the formula entered in an unused box

## 7.2.2 More Complex Filter Examples

To show:

- Runtime between 90–120 mins
- Genre is **Sci-Fi** or anything containing **Action**
- OR any movie from the 1960s (regardless of other filters):

Use:

- **Runtime:** 90:120
- **Genre:** Sci-Fi+\*Action\*
- **Release Year:** +1960:1969

The screenshot displays the Auto ExcelForms application interface. At the top is a ribbon with tabs: File, Home, Table Form, Insert, Draw, Page Layout, Formulas, Data, Review, View, RC, Developer, Help, Power Pivot, and Table Design. Below the ribbon is a toolbar with various icons for actions like Import Worksheets, Customise Columns, New Starter Sheet, Options, Relations, Launch Auto Form, Browse & Find, Easy Filter, Report, About, User Permissions, User Login, Sort, Filter, Reapply, and Advanced. The main area shows a table with columns: Nr., Link, Year, Title, Runtime, Genre, MPAA, and Notes. The table is filtered to show 340 items. A red arrow points from the 'Easy Filter' button in the toolbar to a 'MovieDatabase Filter Form' dialog box. The dialog box has a title bar and a close button. It contains a text area for inputting filters, a 'Set' button, a 'Clear' button, a 'Save-Retrieve' button, and a 'Quit' button. Below the text area are input fields for 'Nr.', 'Link', 'Year', 'Title', 'Runtime', 'Genre', 'MPAA', and 'Notes'. The 'Year' field is set to '+1960:1969', the 'Runtime' field is set to '90:120', and the 'Genre' field is set to 'Sci-Fi+\*Action\*'. At the bottom of the dialog box, there are two radio buttons: 'Force Advanced Filter' (selected) and 'Use AutoFilter if possible'.

Nr.	Link	Year	Title	Runtime	Genre	MPAA	Notes
1890	1889	tt0430105	2005	Four Brothers	109	Action/Adventure	
1893	1892	tt4026600	346838	2015	Four Warriors	95	Action/Adventure
1909	1908	tt1815708	2012	Freelancers	96	Action/Adventure	
1910	1909	tt3735554	305044	2015	Freetown	113	Action/Adventure
1912	1911	tt0067116	1971	The French Connection	104	Action/Adventure	
1914	1913	tt2414766	218425	2013	Frequencies	105	Sci-Fi
1918	1917	tt0073019	56539	1975	Friday Foster	90	Action/Adventure
1919	1918	tt0390022	2004	Friday Night Lights	118	Action/Adventure	
1931	1930	tt0116367	1996	From Dusk Till Dawn	108	Action/Adventure	
1933	1932	tt1179034	2010	From Paris with Love	92	Action/Adventure	
1935	1934	tt0057076	1963	From Russia with Love	115	Action/Adventure	
1941	1940	tt2294629	2013	Frozen	102	Action/Adventure	
1953	1952	tt0060438	17768	1966	A Funny Thing Happened on the Way to the Forum	99	Comedy/Romance
						Approved	

The OR operator + on the third entry overrides other constraints—records matching it will be included even if others don't apply.

### 7.2.3 Another Formula Example

To show only rows where:


- Quantity < 5 **OR**
- Quantity divisible by 5  
(where Quantity data starts at D3):

Enter the following formula into any unused box on the filter form:

`#OR(MOD(D3,5)=0, D3<5)`

This assumes the Quantity data (not the column header) starts in cell D3.

If you're unsure, look at your table: the formula must reference the first actual data row, not the header row.

 **Tip:** Filtered data can be exported via the **Report** function—just one click copies it to a new formatted worksheet, ready for viewing or printing.

## 7.3 Copy Results to Sheet

The Copy Results to Sheet button lets you copy the currently filtered source table to a location of your choice within the workbook. When clicked, you will be prompted to select a destination cell. The entire table is copied, but only the visible rows and columns are included—making it easy to export filtered results.

If no filters are applied, the entire table is copied in full.

Copying is not permitted if the selected destination would:

- Overlap an existing Excel Table, or
- Place the data onto the source worksheet itself.

The screenshot shows an Excel spreadsheet with a table of movie data. The table has columns: Nr., Link, Year, Title, Runtime, Genre, and MPAA. A 'MovieDatabase Filter Form' dialog box is open, displaying various filter options like Title, Runtime, Genre, and MPAA. The 'Copy Results to Sheet' button is highlighted, and a yellow callout box points to it with the text: 'User Clicked on "Copy Results to sheet" and selected cell C2 on Sheet 3'.

Nr.	Link	Year	Title	Runtime	Genre	MPAA
69	tt2304933	299687	2016 The 5th Wave	112	Sci-Fi	PG-13
75	tt3012340	344213	2015 7 Cases	95	Thriller	NR
117	tt1861445	289723	2015 An Act of War	99	Thriller	NR
122	tt1735907	274504	2016 The Adderall Diaries	1h	Thriller	R
146	tt4581576	390051	2017 Aftermath	94	Thriller	R
157	tt2091478	284674	2015 Air	95	Sci-Fi	PG-13
188	tt3040216	340243	2015 All Mistakes Buried	1h	Thriller	NR
200	tt3410834	262504	2016 Allegiant			
222	tt4392770	385737	2016 Always Shine			
232	tt4060988	385691	2015 American Descent			
279	tt4073890	395883	2015 Andron			
280	tt3317208	277710	2016 Anesthesia			
285	tt5344752	377859	2015 Angel Whispers			
305	tt2484224	330628	2016 The Answer			
308	tt4190530	351339	2016 Anthropoid			
346	tt2543164	329865	2016 Arrival			
363	tt3030354	326057	2015 Assassin			
364	tt3030354	326057	2015 Assassin			
375	tt3472714	379050	2015 At Granny's House			
400	tt4296026	323660	2015 Avengers Grimm			
403	tt2395427	99861	2015 Avengers: Age of Ultron			
412	tt2048865	342502	2015 AWOL-72			
454	tt3355510	322850	2015 Badge of Honor			
576	tt2278870	401222	2016 Beyond the Edge			
580	tt2911668	284289	2015 Beyond the Reach			
603	tt2689958	332839	2015 Big Sky			
712	tt4334642	336049	2017 Bonded by Blood 2			
738	tt4145324	316410	2015 Bound			
746	tt3181822	241251	2015 The Boy Next Door			
774	tt3682448	296098	2015 Bridge of Spies			
790	tt3701714	278925	2016 Broken Vows			
846	tt3923388	388347	2016 The Call Up	1h	Sci-Fi	NR
854	tt2639514	277353	2015 Campus Code	1h	Sci-Fi	NR
862	tt3498820	271110	2016 Captain America: Civil War	147	Sci-Fi	PG-13
870	tt3268668	331190	2015 Captive	1h	Thriller	PG-13
875	tt1629242	317744	2015 Careful What You Wish For	91	Thriller	R
882	tt1363224	378088	2015 The Carrier	1h	Sci-Fi	NR
895	tt3294664	384446	2016 Cassidy Way	1h	Thriller	NR



## 7.4 Save & Retrieve Filters

AutoExcelForms' Easy Filter already lets users apply simple or complex filter logic using a clean, form-based interface — no formulas required. Now, the Easy Filter has been enhanced with a **Save & Retrieve** feature, making it even easier to reuse your favorite filter combinations.

### 7.4.1 Save time by saving filters

When working with frequently used filters — like “Open Jobs in the North Region” or “Orders over \$500” — you can now save your current filter settings and reuse them later with a couple of clicks.

After setting up any filter on the Easy Filter form, click the **Save-Retrieve** button to open the Save-Retrieve window.

The screenshot displays the AutoExcelForms application interface. The top ribbon includes tabs for File, Home, Table Form, Insert, Draw, Page Layout, Formulas, Data, Review, View, RC, Developer, Help, Power Pivot, and Table Design. The 'Table Form' tab is active, showing various utility and customization options. A red arrow points from the 'Easy Filter' button in the ribbon to the 'Easy Filter Form' window.

The 'Easy Filter Form' window is open, showing a list of filters on the left and a form for defining filters on the right. The form includes fields for 'WO', 'District', 'Lead Tech', 'Service', 'Description', 'Wty Lbr', 'Parts Cost', 'Lbr Rate', 'Parts Fee', and 'Req Day'. A red arrow points from the 'Save-Retrieve' button in the form to the 'AutoExcelForms Saved Filters for TableData' window.

The 'AutoExcelForms Saved Filters for TableData' window is open, showing a list of saved filters. The 'Filter Save and Retrieve Form' window is also open, showing the 'Retrieve and Close' button. A yellow arrow points from the 'Retrieve and Close' button to the 'Filter Save and Retrieve Form' window.

The background shows a table with columns: Work Date, Techs, Wty Lbr, Wty Parts, Lbr Hrs, and Parts C. The table contains data for various work orders (WO) and their associated costs and labor hours.

### 7.4.2 What you'll see

<u>Control</u>	<u>Purpose</u>
<b>Add New</b>	Saves the currently defined filter from the Easy Filter form.
<b>Delete</b>	Removes a previously saved filter.
<b>Retrieve and Close</b>	Loads a selected saved filter back into the Easy Filter form for reuse or editing.
<b>Close</b>	Exits without making changes.
<b>Submit Spec</b>	Confirms and saves a new filter (only visible once a name is entered).
<b>Saved Filter Name</b>	Enter or edit the name of the filter to be saved.
<b>Defined Filters</b>	A list of previously saved filters for the current table.
<b>Defined Filter Specs</b>	A read-only summary of the selected filter's criteria in plain English.

### 7.4.3 How it works

#### 1. Saving a filter

- On the Easy Filter form, define your desired filter.
- Click **Save-Retrieve**.
- In the Save-Retrieve form, click **Add New**.
- Enter a name in the **Saved Filter Name** box. The **Submit Spec** button will appear.
- Click **Submit Spec** to save.

#### 2. Retrieving a filter

- Click the **Save-Retrieve** button.
- Select a saved filter from the list.
- Click **Retrieve and Close** to load it back into the Easy Filter form.
- From there, click **Set** to apply it, or make changes before applying.

#### 3. Deleting a filter

- Select it from the list and click **Delete**.

#### The "Defined Filter Specs" Box

Once saved filters are given meaningful names others should have no problem interpreting what they represent. In addition to this, users can refer to the Defined Filter Specs box — a read-only text area that translates the technical filter conditions into a more readable format. This is for informational purposes only, to help you quickly understand what a saved filter does.

Suppose you're working in the **Orders** table and define this filter:

- **Description:** \*printers\*
- **Price:** >250
- **Region:** West+South

The **Defined Filter Specs** box will display:

*Description: Contains printers*

*Price: Greater than 250*

*Region: West or South*

This helps users instantly grasp the logic behind the saved filter without needing to interpret raw symbols or operators.

#### 7.4.4 Notes

- You must provide a filter name to save it — otherwise, an error will appear.
- You must have at least one filter condition defined before saving.
- Saved filters are specific to the current data table (e.g., Orders, Customers).

## 8 Auto Reports

AutoExcelForms provides a fast, convenient way to display or print selected table columns from the active worksheet's data.

By default, the first 10 columns of the table are included in the report. However, any combination of up to 10 columns—contiguous or non-contiguous—can be selected through the User Options interface. This is something that's typically not easy to do in Excel without manual setup. You can also easily rearrange the column order using a simple point-and-click interface.

The rows included in the report reflect any filters currently applied to the source data. Column widths and number formats are also inherited from the source table.

The output is pre-formatted for printing or PDF export on letter-sized paper in **landscape orientation**. The report is a regular Excel table, so you can freely customize its appearance—change column widths, adjust styles, or update the heading—before printing. Page headers repeat on each printed page, and there are one-click options to include page numbers, totals, or a custom banner at the top of the first page.

### 8.1 Table Output

The report data is generated on a new worksheet named **AutoTable Report**. From this worksheet, you can

- Add or remove totals at the bottom
- Include a custom first-page banner
- Print directly using Ctrl+P or File → Print

After printing or exporting, you may delete the worksheet if you wish.

#### Auto Report Worksheet

Adjusted column widths or delete columns as needed. Use Excel "File - Print" when done. Press the "Regenerate Report" button to the right of here to regenerate if any of the parameters to the left like "Print Page #"

Print Page # [Yes/No] | Print Totals? [Yes/No] | Print Top Header? [Yes/No]

Re-Generate Report

WO	Service	Description	District	Lead Tech	Req Date	Parts Cost	Lbr Cost	Total Cost
A00768	Repair	Rep Trk Line-623-6507,appears Busy But Not Engaged	Northwest	Burton	01-Jan-23	\$479.36	\$35.00	\$14.36
A00769	install	To Install 2 Exts & Supply Phone	West	Khan	01-Jan-23	\$180.00	\$20.00	200.00
A00772	Repair	To Program 1 Motorola Gtx Portable	Southwest	Khan	02-Jan-23	\$176.31	\$70.00	246.31
A00773	Repair	To Repair 3 Exts & Run General Chks To Tel System	Central	Cartier	02-Jan-23	\$280.00	\$40.00	320.00
A00774	Repair	To Check Reprtr Getting Very Weak Signal On Port.	Central	Khan	02-Jan-23	\$345.73	\$280.00	625.73
A00775	Repair	To Repair 1 Memo Express Pager/ Fell In Water	North	Ling	03-Jan-23	\$158.29	\$140.00	298.29
A00776	Repair	To Repair Ext 111 Line Dead	Northwest	Cartier	03-Jan-23	\$14.42	\$40.00	54.42
A00778	Repair	To Repair 1 Johnson Base Set With P/s & Mic	North	Ling	03-Jan-23	\$63.44	\$35.00	98.44
A00779	install	Re-prog All Ext O/seas Access/rem Fax Line .	Central	Cartier	03-Jan-23	\$30.00	\$40.00	70.00
A00780	Repair	To Repair Exts 15 & 18 & Supply 5 Tel Line Cords	Northeast	Ling	03-Jan-23	\$496.00	\$40.00	536.00
A00781	Repair	To Repair 2 Flow Meters.	Northwest	Cartier	03-Jan-23	\$126.81	-	126.81
A00782	Repair	To Repair Fax Line 623-3785.	West	Khan	03-Jan-23	\$144.00	-	144.00
A00783	Repair	E999 Rep 1 Lts 2000 & Mobile Veh Pbb 5930/no Tx	East	Ling	05-Jan-23	\$494.93	\$70.00	564.93
A00784	Repair	To Check Repeater/ All Rados Down/ Ch1 Not Working	North	Ling	05-Jan-23	\$30.05	\$35.00	65.05
A00785	Repair	To Repair 1 Memo Express Pager Unit Not Working	Southeast	Burton	07-Jan-23	\$147.64	\$20.00	167.64
A00787	Repair	To Repair Housing On 1 Gp300 Porable	Northeast	Ling	07-Jan-23	\$288.00	\$70.00	358.00
A00788	Repair	To Check/repair One Gp300, W/charger & Power Supp.	Northwest	Cartier	07-Jan-23	\$150.00	\$140.00	290.00
A00790	Repair	Rep 1 Radius Mobile/supply Antenna/access Tbc2396	North	Ling	07-Jan-23	\$287.25	\$20.00	307.25
A00791	install	Site Survey For Tel Line Installation In Trailer	West	Cartier	07-Jan-23	\$147.40	\$35.00	182.40
A00792	install	To Install Ext In Server Room	North	Ling	07-Jan-23	\$59.24	\$20.00	79.24
A00794	Repair	To Repair 1 Visar Portable No Tx No Rx	North	Ling	07-Jan-23	\$197.47	\$35.00	232.47
A00796	Repair	Rep M/w System.incoming Calls Routed To Optr	Southeast	Burton	08-Jan-23	\$64.34	\$40.00	104.34
A00797	Repair	To Repair Switchboard/blank intermittent	South	Lopez	08-Jan-23	\$10.28	\$40.00	50.28
A00798	Repair	To Repair 1 Gtx Portable Problem Not Specified	Northwest	Burton	08-Jan-23	\$319.02	\$105.00	424.02
A00799	Repair	To Repair 1 Memo Express Pager.	Northwest	Khan	08-Jan-23	\$131.00	\$60.00	191.00
A00800	install	To Install 1 Gtx Mobile In Veh Tbc 5372	North	Ling	08-Jan-23	\$167.00	\$35.00	202.00
A00801	Repair	To Repair Ext 120, Phone Defective	Southeast	Burton	08-Jan-23	\$91.04	\$40.00	131.04
A00804	Repair	To Repair 2 Gtx Portable Not Working	Southeast	Cartier	08-Jan-23	\$281.62	-	281.62

## 8.2 Sample Report

Sample pdf from Auto Report

Printed On: 22/04/2023

** 257 Items Selected By: Service =Install Or Repair   Req Date =Last Quarter from Data Table: TableData										
WO	District	Lead Tech	Service	Req Date	Description	Work Date	Payment	Total Cost	Total Fee	
A00768	Northwest	Burton	Repair	01-Jan-23	Rep Trk Line-623-6507.appears Busy But Not Engaged	14-Jan-23	Account	\$514.36	\$514.38	
A00769	West	Khan	install	01-Jan-23	To Install 2 Exts & Supply Phone	23-Jan-23	P.O.	\$200.00	\$200.00	
A00772	Southwest	Khan	Repair	02-Jan-23	To Program 1 Motorola Gtx Portable	06-Feb-23	C.O.D.	\$246.31	\$246.31	
A00773	Central	Cartier	Repair	02-Jan-23	To Repair 3 Exts & Run General Chks To Tel System	13-Feb-23	Account	\$320.00	\$320.00	
A00774	Central	Khan	Repair	02-Jan-23	To Check Repr Getting Very Weak Signal On Port.	12-Mar-23	C.O.D.	\$625.73	\$625.73	
A00775	North	Ling	Repair	03-Jan-23	To Repair 1 Memo Express Pager/ Fell In Water	21-Jan-23	Account	\$298.29	\$298.29	
A00776	Northwest	Cartier	Repair	03-Jan-23	To Repair Ext 111 Line Dead	22-Jan-23	Account	\$54.42	\$54.42	
A00778	North	Ling	Repair	03-Jan-23	To Repair 1 Johnson Base Set With P/s & Mic	29-Jan-23	Account	\$98.44	\$98.44	
A00779	Central	Cartier	install	03-Jan-23	Re-prog All Ext O/leas Access/rev Fax Line .	06-Feb-23	C.O.D.	\$70.00	\$70.00	
A00780	Northwest	Ling	Repair	03-Jan-23	To Repair Exts 15 & 18 & Supply 5 Tel Line Cords	07-Feb-23	Account	\$536.00	\$536.00	
A00781	Northwest	Cartier	Repair	03-Jan-23	To Repair 2 Flow Meters.		C.O.D.	\$126.81	-	
A00782	West	Khan	Repair	03-Jan-23	To Repair Fax Line 623-3785.		C.O.D.	\$144.00	\$144.00	
A00783	East	Ling	Repair	05-Jan-23	E999 Rep 1 Lts 2000 & Mobile Veh Pbb 5930/no Tx	28-Jan-23	C.O.D.	\$564.93	\$70.00	
A00784	North	Ling	Repair	05-Jan-23	To Check Repeater/ All Rados Down/ Ch1 Not Working	29-Jan-23	C.O.D.	\$65.05	\$65.05	
A00785	Southwest	Burton	Repair	07-Jan-23	To Repair 1 Memo Express Pager Unit Not Working	15-Jan-23	Account	\$167.64	\$167.64	
A00787	Northwest	Ling	Repair	07-Jan-23	To Repair Housing On 1 Gp300 Portable	23-Jan-23	Account	\$358.00	\$358.00	
A00788	Northwest	Cartier	Repair	07-Jan-23	To Check/repair One Gp300, W/charger & Power Supp.	23-Jan-23	C.O.D.	\$290.00	\$290.00	
A00790	North	Ling	Repair	07-Jan-23	Rep 1 Radius Mobile/supply Antenna/access Tbc2396	29-Jan-23	Account	\$307.25	\$307.25	
A00791	West	Cartier	install	07-Jan-23	Site Survey For Tel Line Installation In Trailer	01-Feb-23	C.O.D.	\$182.40	\$182.40	
A00792	North	Ling	install	07-Jan-23	To Install Ext In Server Room	09-Feb-23	C.O.D.	\$79.24	\$79.24	
A00794	North	Ling	Repair	07-Jan-23	To Repair 1 Visar Portable No Tx No Rx	12-Feb-23	C.O.D.	\$232.47	\$232.47	
A00796	Southwest	Burton	Repair	08-Jan-23	Rep M/w System, incoming Calls Routed To Opt	17-Jan-23	Account	\$104.34	\$104.34	
A00797	South	Lopez	Repair	08-Jan-23	To Repair Switchboard/blank, intermittent	21-Jan-23	Account	\$50.28	\$50.28	
A00798	Northwest	Burton	Repair	08-Jan-23	To Repair 1 Gtx Portable Problem Not Specified	24-Jan-23	C.O.D.	\$424.02	\$424.02	
A00799	Northwest	Khan	Repair	08-Jan-23	To Repair 1 Memo Express Pager.	22-Jan-23	C.O.D.	\$191.00	\$191.00	
A00800	North	Ling	install	08-Jan-23	To Install 1 Gtx Mobile In Veh Tbc 5372	23-Jan-23	Account	\$202.00	\$202.00	
A00801	Southwest	Burton	Repair	08-Jan-23	To Repair Ext 120, Phone Defective	30-Jan-23	Account	\$131.04	\$131.04	
A00804	Southwest	Cartier	Repair	08-Jan-23	To Repair 2 Gtx Portable Not Working		Account	\$281.62	\$281.62	
A00805	South	Lopez	Repair	09-Jan-23	Estimate Cost/rep,micro Tac Lite Cell.no Rx Calls	21-Jan-23	P.O.	\$47.02	\$47.02	
A00806	South	Lopez	Repair	09-Jan-23	To Repair 4 Mtx 838 Trk Portables	21-Jan-23	Account	\$69.00	\$69.00	
A00807	South	Lopez	install	09-Jan-23	To Install Analog Card,music On Hold & Wall Board	21-Jan-23	P.O.	\$90.57	\$90.57	
A00808	East	Ling	install	09-Jan-23	Site Survey To Relocate Base Radio	24-Jan-23	C.O.D.	\$341.79	\$341.79	
A00809	East	Ling	Repair	09-Jan-23	To Program 1 Gtx Mobile	19-Feb-23	Warranty	\$49.70	-	
A00810	Southwest	Cartier	Repair	10-Jan-23	To Repair 1 Tele Tac 250 Unit Not Working	29-Jan-23	C.O.D.	\$766.36	\$455.00	
A00811	Central	Cartier	Repair	10-Jan-23	To Check Repr All Radios Are Dead	01-Feb-23	C.O.D.	\$249.32	\$249.32	
A00812	Northwest	Cartier	install	10-Jan-23	To Install 1 Lucent Analog Port Card.	07-Feb-23	Account	\$114.53	\$114.53	
A00813	Central	Cartier	install	10-Jan-23	To Install Add Exts In Container	18-Feb-23	C.O.D.	\$793.22	\$793.22	
A00815	North	Ling	Repair	10-Jan-23	To Program 3 Gtx Portables		Account	\$49.42	\$49.42	
A00816	Southwest	Burton	install	10-Jan-23	Site Survey To Relocate Base Radio .	08-Mar-23	C.O.D.	\$852.55	\$852.55	
A00817	Northwest	Burton	install	11-Jan-23	To Install Mobile In Veh Tah 7551	22-Jan-23	Account	\$76.75	\$76.75	
A00818	Northwest	Cartier	install	11-Jan-23	Restrict Ext For Guard/ & Install 1 Add Ext	12-Feb-23	P.O.	\$137.97	\$137.97	
A00819	Northwest	Cartier	Repair	11-Jan-23	To Repair Midland Base Radio, Intermittent Tx/rx		P.O.	\$90.00	\$90.00	
A00820	Northwest	Burton	Repair	12-Jan-23	Rep 1 Gp 300 Radio & 6 P/s. & Ret To Mr. Taylor		C.O.D.	\$108.51	\$108.51	
A00821	North	Ling	Repair	14-Jan-23	To Repair Exts In Office. Unidentified .	23-Jan-23	Account	\$42.00	\$42.00	
A00823	South	Lopez	install	14-Jan-23	To Relocate Exts 105 & 116	05-Feb-23	Account	\$171.15	\$171.15	
A00824	South	Burton	Repair	14-Jan-23	To Repair 1 Mtx 838 Portable No Tx/rx	04-Mar-23	Account	\$344.54	\$344.54	
A00825	Central	Cartier	Repair	14-Jan-23	Rep 1 Mocom 10 Base/supply	07-Mar-23	C.O.D.	\$697.69	\$697.69	
A00827	Southwest	Khan	Repair	15-Jan-23	To Programme 1 Gm 300 Mobile Radio	09-Feb-23	C.O.D.	\$66.57	\$66.57	
A00828	West	Burton	install	15-Jan-23	To Install 2 Add. Exts.	04-Feb-23	C.O.D.	\$184.60	\$184.60	
A00829	West	Khan	install	15-Jan-23	To Install Lucent Tech. Partner Tel System	06-Feb-23	C.O.D.	\$431.29	\$431.29	
A00830	East	Ling	Repair	15-Jan-23	To Repair Tel System, Cannot Transfer Calls	25-Feb-23	C.O.D.	\$178.00	\$178.00	
A00831	Northwest	Cartier	Repair	15-Jan-23	To Repair Mobile Radio In Veh Pbb	11-Mar-23	C.O.D.	\$187.24	\$187.24	
A00832	Central	Burton	install	15-Jan-23	Remove From Pba 3788 & Install In Tbc 8036 & 8037		C.O.D.	\$151.28	-	
A00833	Northwest	Cartier	Repair	15-Jan-23	To Programme 6 Gtx Trk Portables & 2 Gtx Mobiles		P.O.	\$47.05	\$47.05	
A00834	Northwest	Burton	Repair	16-Jan-23	To Repair 1 Mtx 838 Portable Radio.no Tx No Rx	25-Jan-23	C.O.D.	\$71.73	\$71.73	

Page 1 of 5



## 8.3 Auto Report Columns from Related Tables

You can include columns from related (parent) tables in 1-click Auto Reports — no VLOOKUPs, XLOOKUPs, or macros required.

For example, while doing reports from the Orders table, you can add columns like *Customer.CompanyName* or *Salesperson.LastName* — even though those fields are stored in other tables. AutoExcelForms automatically detects relationships and makes these columns available in the Select Report Headers setup (see “[Select Report Headers](#)”).

Related columns appear with headers on 2 rows like

**RelatedTable**  
**ColumnName**

Note: Auto column sizing may be less precise when related columns are included. You may need to manually adjust column widths for optimal display.

Reporting columns from related tables

Printed On 02/06/2025

Report Selected Table columns

Report Related Table columns

** 117 Items Selected By: freight >150 from Data Table: tblOrders							
customerid	employeeid	orderdate	shippeddate	tblCustomers companyname	tblCustomers city	tblEmployees lastname	tblEmployees firstname
FRANK	4	29/07/1996	06/08/1996	Frankenversand	München	Peacock	Margaret
QUICK	8	21/08/1996	30/08/1996	QUICK-Stop	Cunewalde	Callahan	Laura
HUNGO	6	05/09/1996	11/09/1996	Hungry Owl All-Night Grocers	Cork	Suyama	Michael
OLDWO	8	13/09/1996	09/10/1996	Old World Delicatessen	Anchorage	Callahan	Laura
RATTC	1	27/09/1996	08/10/1996	Rattlesnake Canyon Grocery	Albuquerque	Davolio	Nancy
SAVEA	9	08/10/1996	10/10/1996	Save-a-lot Markets	Boise	Dodsworth	Anne
SPLIR	4	15/10/1996	23/10/1996	Split Rail Beer & Ale	Lander	Peacock	Margaret
BONAP	1	29/10/1996	08/11/1996	Bon app'	Marseille	Davolio	Nancy
QUICK	2	04/11/1996	11/11/1996	QUICK-Stop	Cunewalde	Fuller	Andrew
ERNSH	1	11/11/1996	20/11/1996	Ernst Handel	Graz	Davolio	Nancy
PICCO	7	13/11/1996	25/11/1996	Piccolo und mehr	Salzburg	King	Robert
SEVES	5	21/11/1996	26/11/1996	Seven Seas Imports	London	Buchanan	Steven
QUICK	1	22/11/1996	03/12/1996	QUICK-Stop	Cunewalde	Davolio	Nancy
SPLIR	8	02/12/1996	09/12/1996	Split Rail Beer & Ale	Lander	Callahan	Laura
QUEEN	5	04/12/1996	09/12/1996	Queen Cozinha	Sao Paulo	Buchanan	Steven
BERGS	3	16/12/1996	20/12/1996	Berglunds snabbköp	Luleå	Leverling	Janet
HILAA	6	26/12/1996	03/01/1997	HILARION-Abastos	San Cristóbal	Suyama	Michael
MAGAA	2	03/01/1997	08/01/1997	Magazzini Alimentari Riuniti	Bergamo	Fuller	Andrew
MEREP	7	23/01/1997	27/01/1997	Mère Paillard	Montréal	King	Robert
ERNSH	4	30/01/1997	03/02/1997	Ernst Handel	Graz	Peacock	Margaret
BLOINP	3	05/02/1997	11/02/1997	Blondel père et fils	Strasbourg	Leverling	Janet
QUICK	4	19/02/1997	12/03/1997	QUICK-Stop	Cunewalde	Peacock	Margaret
WARTH	8	24/02/1997	03/03/1997	Wartian Herkku	Oulu	Callahan	Laura
RATTC	3	19/03/1997	21/03/1997	Rattlesnake Canyon Grocery	Albuquerque	Leverling	Janet
HILAA	7	31/03/1997	03/04/1997	HILARION-Abastos	San Cristóbal	King	Robert
SAVEA	6	18/04/1997	28/04/1997	Save-a-lot Markets	Boise	Suyama	Michael
BONAP	4	18/04/1997	21/04/1997	Bon app'	Marseille	Peacock	Margaret
ERNSH	3	22/04/1997	16/05/1997	Ernst Handel	Graz	Leverling	Janet
QUICK	2	23/04/1997	23/05/1997	QUICK-Stop	Cunewalde	Fuller	Andrew
TORTU	4	25/04/1997	05/05/1997	Tortuga Restaurante	México D.F.	Peacock	Margaret
BERGS	1	01/05/1997	07/05/1997	Berglunds snabbköp	Luleå	Davolio	Nancy
PICCO	3	08/05/1997	12/05/1997	Piccolo und mehr	Salzburg	Leverling	Janet
FOLKO	8	12/05/1997	22/05/1997	Folk och få HB	Bräcke	Callahan	Laura
QUICK	3	19/05/1997	13/06/1997	QUICK-Stop	Cunewalde	Leverling	Janet
VICTE	1	23/05/1997	27/05/1997	Victuailles en stock	Lyon	Davolio	Nancy
SEVES	3	23/05/1997	02/06/1997	Seven Seas Imports	London	Leverling	Janet
QUICK	5	27/05/1997	30/05/1997	QUICK-Stop	Cunewalde	Buchanan	Steven
SAVEA	6	02/06/1997	04/06/1997	Save-a-lot Markets	Boise	Suyama	Michael
FOLKO	2	06/06/1997	09/06/1997	Folk och få HB	Bräcke	Fuller	Andrew
MEREP	3	17/06/1997	19/06/1997	Mère Paillard	Montréal	Leverling	Janet
QUICK	2	03/07/1997	10/07/1997	QUICK-Stop	Cunewalde	Fuller	Andrew
LEHMS	7	09/07/1997	13/08/1997	Lehmanns Marktstand	Frankfurt a.M.	King	Robert
MEREP	1	21/07/1997	29/07/1997	Mère Paillard	Montréal	Davolio	Nancy
SAVEA	5	22/07/1997	25/07/1997	Save-a-lot Markets	Boise	Buchanan	Steven
SAVEA	1	28/07/1997	01/08/1997	Save-a-lot Markets	Boise	Davolio	Nancy
MEREP	1	01/08/1997	08/08/1997	Mère Paillard	Montréal	Davolio	Nancy
ERNSH	7	15/08/1997	18/08/1997	Ernst Handel	Graz	King	Robert
FOLIG	4	15/08/1997	21/08/1997	Foies gourmandes	Lille	Peacock	Margaret
QUEEN	6	19/08/1997	26/08/1997	Queen Cozinha	Sao Paulo	Suyama	Michael
LINOD	3	20/08/1997	01/09/1997	LINO-Delicatessen	I. de Margarita	Leverling	Janet
HILAA	4	22/08/1997	26/08/1997	HILARION-Abastos	San Cristóbal	Peacock	Margaret
FAMIA	5	29/08/1997	03/09/1997	Familia Arquibaldo	Sao Paulo	Buchanan	Steven
SAVEA	2	04/09/1997	15/09/1997	Save-a-lot Markets	Boise	Fuller	Andrew

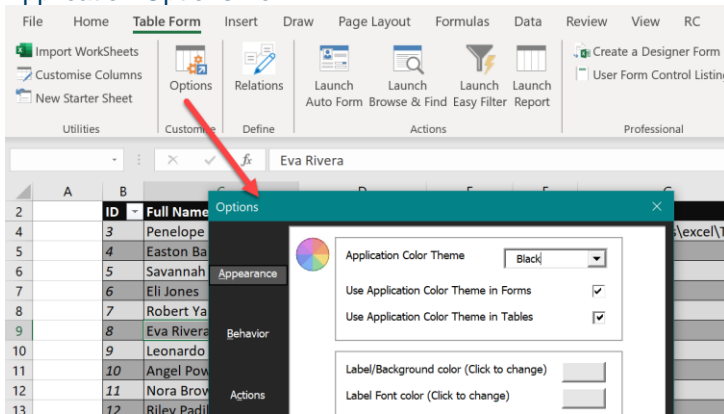
## 9 Application Options and Form Customization

It is easy to use Auto ExcelForms and generate user forms, browse/find windows and reports on demand in one or two clicks without setting up anything, just select a worksheet with a table and click on Launch Autoform. However, you will find that you can customize and do quite a lot more through **options setup** for:

- Your **forms**, their **associated tables** and other **application wide settings**.
- Individualized settings** for how each table column is represented on a generated form.

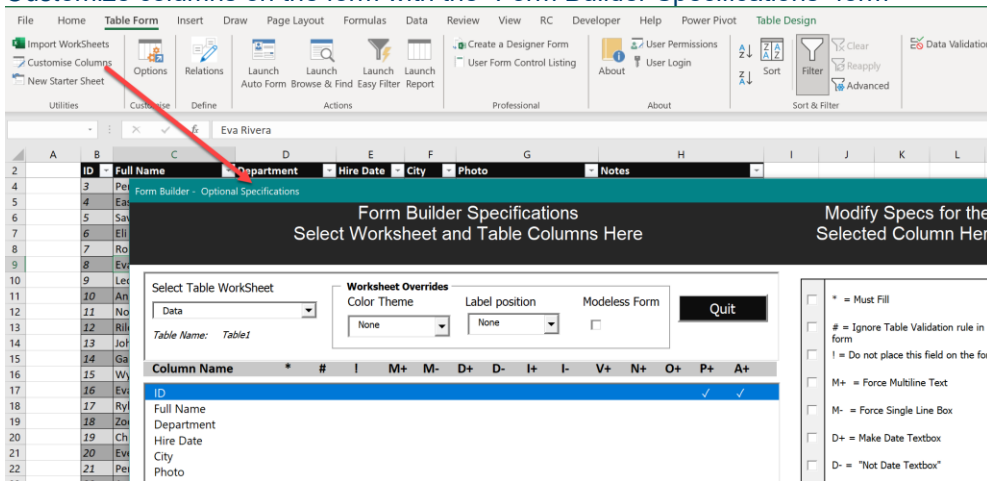
In the case of (a) you can click on the ribbon item “Options” under the TableForm tab and this will bring up the multipage **Options form for general application settings**. *The options form is covered in this section.*

### Application Options Form



In the case of (b), you can **click on the ribbon item “Customize Columns”** under the TableForm tab. This will bring up the “Form Builder Specifications” form allowing you to **customize the form generation results** in granular fashion. *Form build customizations are covered in section 10.*

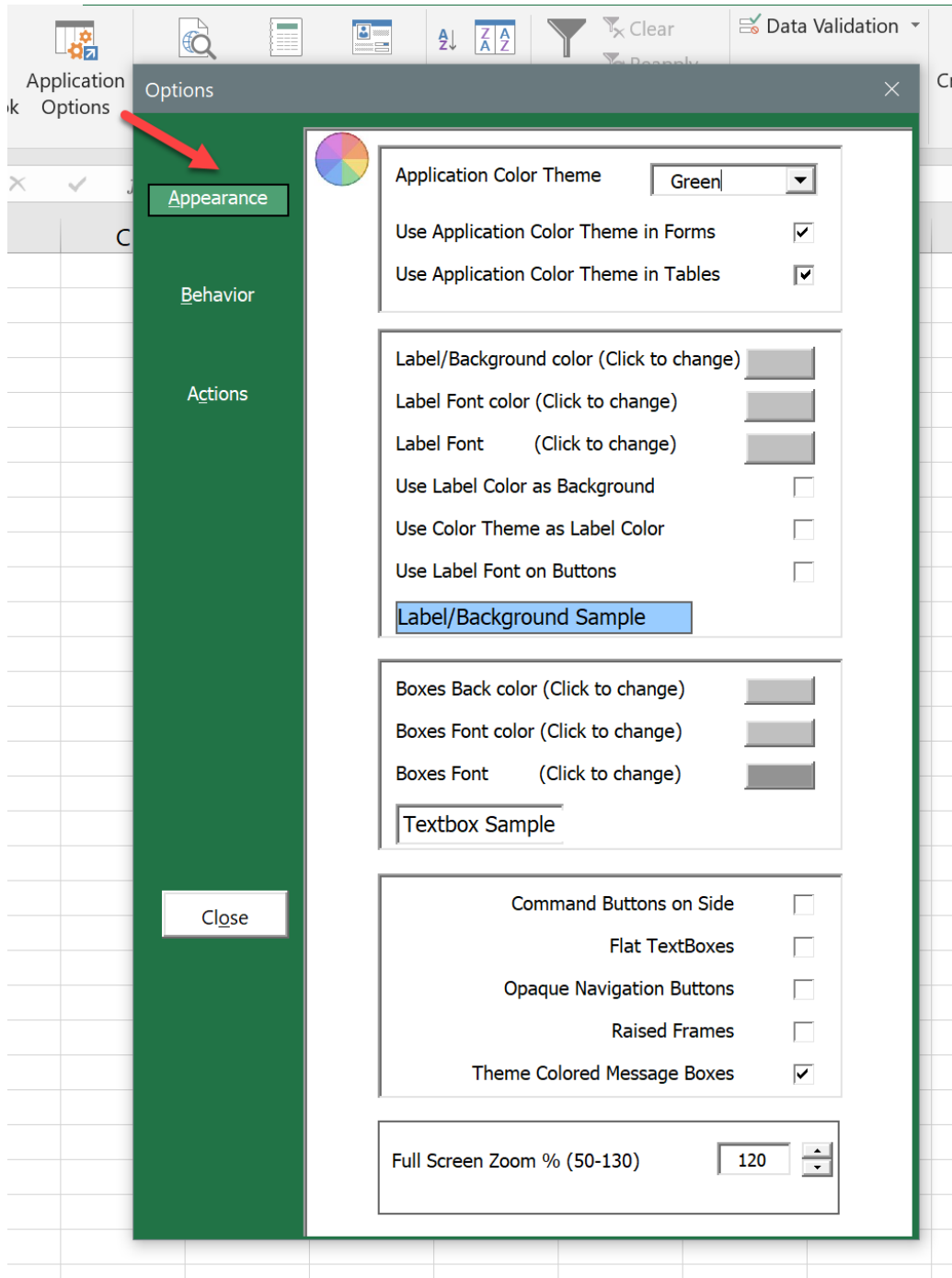
### Customize columns on the form with the “Form Builder Specifications” form





## 9.1 Application Options - Appearance

Clicking the ribbon item “Application Options” will bring up a form with three sections (pages). Appearance, Behavior and Actions. Selecting the first page will bring up various options related to appearance of the various form components.

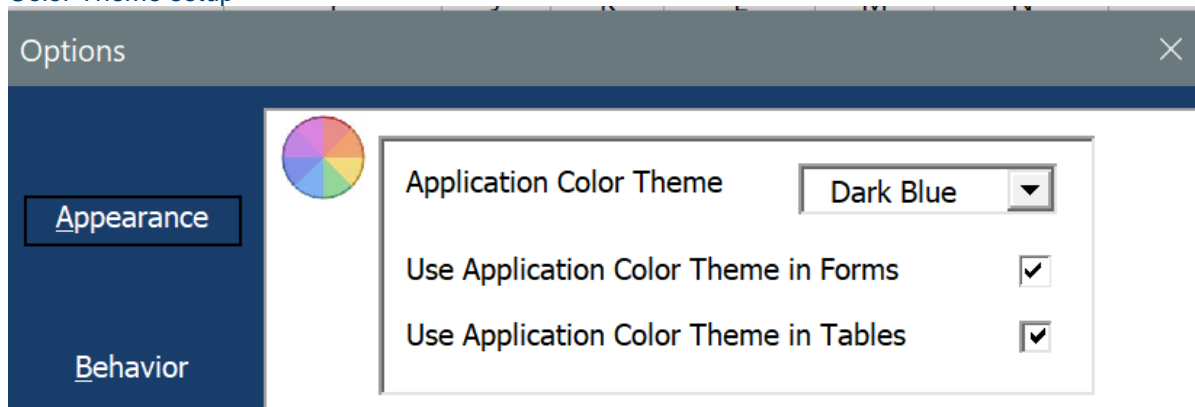


### 9.1.1 Application Theme

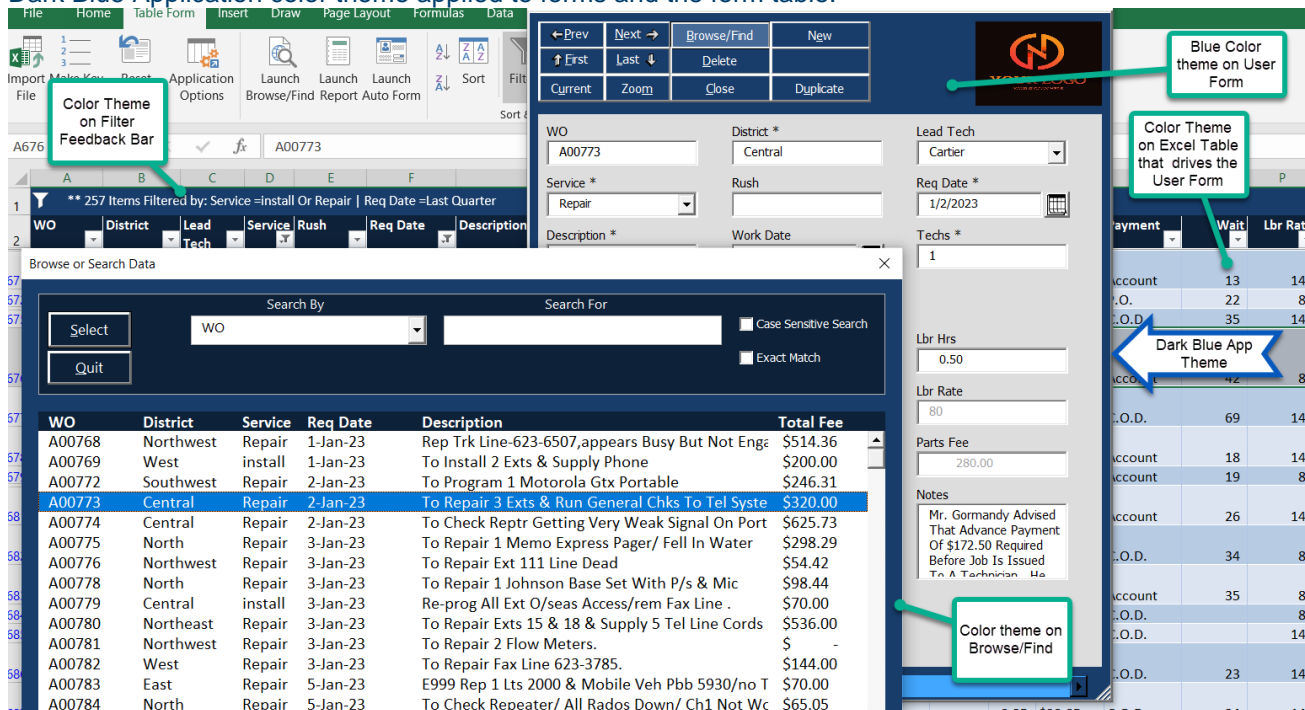
The first section on this form page deal with the application color theme. This basically allows for a coherent set of colors for the forms and tables used in Auto ExcelForms.

In this section you can select the color theme and choose whether to apply it to the Auto ExcelForms forms, worksheet tables, or both.

#### Color Theme setup



#### Dark Blue Application color theme applied to forms and the form table.

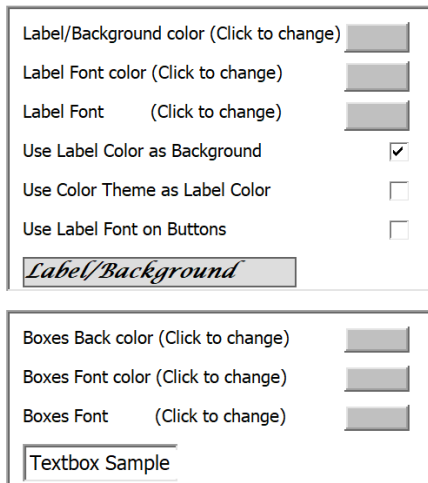


The Application theme color does not apply to the inner section of the user form that holds the labels and boxes. Those colors can be set up in the next two sections of the "appearance" page.

## 9.1.2 Labels and Boxes

This is where you can get quite creative, but hopefully tastefully so! The form data frame and its elements can be modified in terms of colors and fonts. Font selection and color dialog boxes are available to allow as much customization as you wish.

### Labels and Boxes Customization



Label/Background color (Click to change)

Label Font color (Click to change)

Label Font (Click to change)

Use Label Color as Background ☒

Use Color Theme as Label Color ☐

Use Label Font on Buttons ☐

**Label/Background**

---

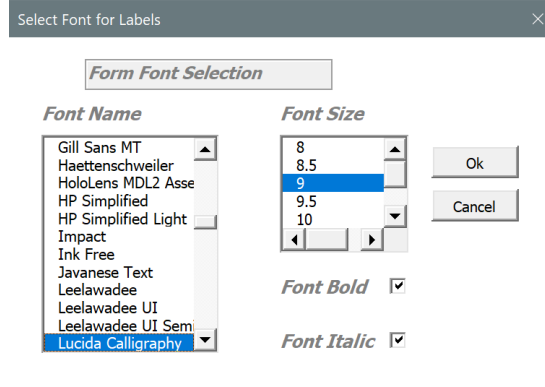
Boxes Back color (Click to change)

Boxes Font color (Click to change)

Boxes Font (Click to change)

Textbox Sample

### Font selection Dialog



Select Font for Labels

**Form Font Selection**

Font Name: Gill Sans MT, Haettenschweiler, Hololens MDL2 Asse, HP Simplified, HP Simplified Light, Impact, Ink Free, Javanese Text, Leelawadee, Leelawadee UI, Leelawadee UI Sem, **Lucida Calligraphy**

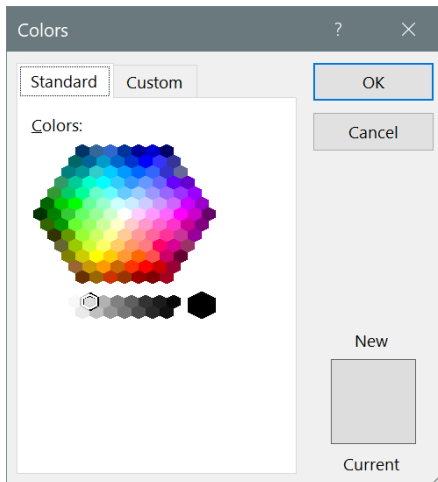
Font Size: 8, 8.5, **9**, 9.5, 10

Font Bold ☒

Font Italic ☒

Ok Cancel

### Color Picker dialog



Colors

Standard Custom OK Cancel

Colors:

New

Current



tblFood Table

Prev Next Browse/Find New

First Last Delete

Zoom Close Duplicate

ID #	Category	Food Item
ID-000D	Baked Goods	Boston cream pie, commercial

Measure	Calories	Protein
1/6	232	2

Fat	Carbs	Fibre
8	39	1.3

Sample Pics: e:\docs\TFimages\Fc

Record 13 of 1094

In the example above, the user prefers the traditional grey user form background instead of the default white that comes with Auto ExcelForms, he also prefers a slightly different label font. This was easily done with a click or two.

Please note, the label background color is always the same as the color of the background frame. Therefore, to change the overall frame color, first select the label background color by clicking the first button, then tick the box, "Use label color as background".



If using anything other than white or grey as Label/background, it usually is best to first tick the "use color theme as label color" before modifying it in the custom color dialog. This will help maintain an overall look that is visually appealing.

### 9.1.3 Additional appearance Options

Further customization can be achieved with the additional options on page 1 of the options form

Feel free to try out these options for different layouts and appearances as they are all self-explanatory.

Command Buttons on Side	<input type="checkbox"/>
Flat TextBoxes	<input checked="" type="checkbox"/>
Labels Above Test Boxes?	<input type="checkbox"/>
Raised Frames	<input type="checkbox"/>
Theme Colored Message Boxes	<input checked="" type="checkbox"/>

Full Screen Zoom % (50-130)	120
-----------------------------	-----

#### Sample appearance options

The left screenshot displays a 'TableData Table' form with a sidebar containing buttons like 'Prev', 'Next', 'First', 'Last', 'Current', 'Browse/Find', 'Delete', 'Zoom', 'New', 'Duplicate', and 'Close'. Annotations highlight 'Command Buttons on the side', 'Flat Text Boxes', and 'Purple Color theme'. The right screenshot shows a data table with annotations for 'Labels on side 2 columns per row' and 'Dark Gray Theme to Complement Office Dark Gray'.



Note that the “Labels above Text Boxes” option will generate 3 columns of Boxes per row instead of 2 columns when using the frequently seen “labels at the side” arrangement. The former is more compact and easier for users to associate the label with the entry.

## 9.2 Application Options – Behavior

### 9.2.1 Form Attributes

Clicking on “Behavior” from the Application Options menu will allow the user to select a number of attributes that will change the behavior of Autogenerated userforms.



Momentarily hovering the cursor over the control box will reveal a tooltip explaining the individual option.

The screenshot shows the 'Options' dialog box with the 'Form Attributes' section active. The left sidebar has three tabs: 'Appearance', 'Behavior' (selected), and 'Actions'. The 'Form Attributes' section contains the following options:

- Make Form Sizeable ? ☒
- Confirmation Prompt Before Saving Data ☐
- Moving to new record commits changes ☐
- Continue Adding after Each New Record ☒
- Freeze Top Table Row ☒
- Numeric Boxes as Displayed on Table ☒
- Allow CheckBox Controls ☒
- Calendar First Day of Week: Monday (dropdown)
- Calendar Font/Size: 11 (dropdown)
- Filter Feedback Bar: Never (dropdown)

The configurable attributes in this section are:

- **Make Form Sizeable** – This determines if the User Form and the Browse windows can be re-sized
- **Confirmation Prompt Before Saving Data** – When ticked, the user will need to confirm via a dialog box before changes are committed to the data table. If unticked, changes are saved immediately when the Save button is clicked.
- **Moving to new record commits changes** – If this is ticked and there are unsaved changes, those changes will be saved automatically when the user navigates to another record. If the confirmation prompt option is also ticked, the user will be asked to confirm before saving. If this is not ticked, then trying to move to a different record with unsaved changes will trigger a warning. The user can choose to continue without saving or stay on the current record.

- **Continue adding after each new record** – When a new record has been added and saved, a new blank form will appear if this option is ticked. If not the newly added record remains in the display, and the user can choose to add another by clicking New or Duplicate again, or choose to do anything else.
- **Freeze top table row** – This option will enable the top table row to remain “frozen” in place at the top of the display.
- **Numeric text boxes as displayed on table** – When this is not ticked, Auto ExcelForms will behave as many user forms including the built-in (hidden) Excel user form. Numeric values are displayed in their raw form. For example, the user will see 63.726 on the form, even though on the spreadsheet the display is \$63.73 based on cell formatting.

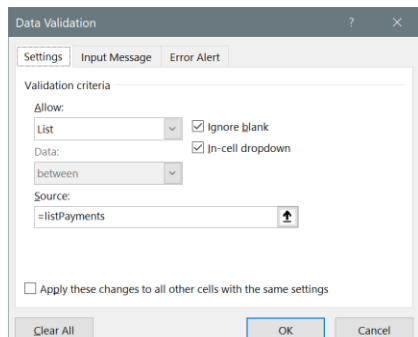
With this option ticked, you have the option of displaying the data as \$63.73 on the form just as displayed on the datasheet. You should be careful with this however. In this case if there is discrepancy between what is displayed and the underlying data, *and there is a change to any field for that record*, the form will submit the form-displayed value \$63.73 back to the table. (Auto ExcelForms will submit any data on the form that differs from the table for non-calculated fields.) In most cases this is not a problem since this usually happens with calculated fields which are read-only on the form, however the user should be aware of situations where this option may cause issues.

- **Calendar First Day of Week** – You can set this to any value from Sunday to Saturday:

- **Calendar Font Size** – The size of the calendar also increases slightly with the font size. This option may be helpful in certain situations where the Display scaling is not set to the recommended value for a particular screen resolution. If the month or year label is not fully displayed, adjusting this setting should resolve the situation.
- **Filter Feedback Bar** – This was explained earlier. The setting here allows for having filter feedback:
  - Always = For any table on any worksheet
  - Temporary = Feedback Bar appears when the form is displayed, removed when the form closes.
  - Never = No Filter Feedback

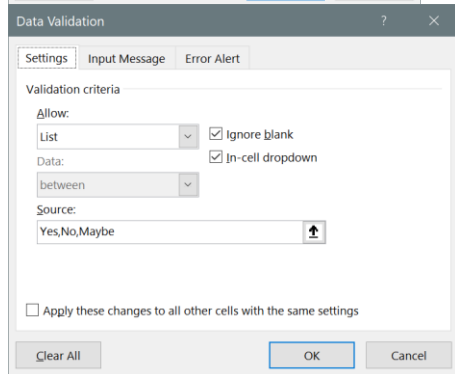
## Auto ExcelForms

- **Allow checkbox controls** – In Auto ExcelForms the data validation rules for individual data columns can be used to drive how the form is built. For instance, if the data validation for a column is a list represented by any named range, (for example: =PaymentTypes ) Auto ExcelForms will build a drop-down combo box for that column.



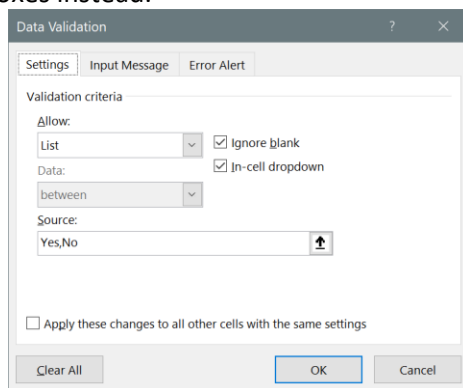
The screenshot shows a form with several fields. The 'Payment' field is a drop-down menu with the following options: Account, C.O.D., Credit, P.O., and Warranty. The 'C.O.D.' option is selected. A yellow callout box with the text 'Drop-Down Combo Box' points to the drop-down arrow.

The same can be achieved by directly using a comma separated list in the data validation setup:



The screenshot shows a form with several fields. The 'District' field is a drop-down menu with the following options: Northwest, Yes, No, and Maybe. The 'Northwest' option is selected. A yellow callout box with the text 'Drop-Down Combo Box' points to the drop-down arrow.

A list with just 2 values (e.g. *Yes,No* or *Complete,Incomplete*) would similarly generate a drop down box with just two values. However, by clicking **Allow checkbox controls in options** you have the option of checkboxes instead:



The screenshot shows a form with several fields. The 'Wty Lbr' and 'Wty Parts' fields are checkboxes. The 'Wty Lbr' checkbox is checked. A yellow callout box with the text 'Checkbox Control' points to the checkbox. The 'Wty Parts' checkbox is also checked. A yellow callout box with the text 'Checkbox Control' points to the checkbox.



## 9.2.2 Primary Key Setup

Use this option to tell Auto ExcelForms that the first table column should be treated as a Primary key and if so, as an Autoincrement Key or not. You can also set up a column of keys for any table.

This section will allow you to do Primary key management.

A primary key is associated with a table column (text box on the form) that has two main characteristics, it cannot be empty, and must not be duplicated. It normally is used to uniquely identify a table row. In Auto ExcelForms, an autoincrement key is a primary key whose value is maintained by the application. The primary key is normally in column 1 of the table.

With deference to some purists, Auto ExcelForms will allow more than one “primary” key, however only *the* primary key in column 1 can be autoincremented.

The primary key setup in this section deals with the main (column 1) primary key only.

The screenshot shows the 'Primary Key Setup' form. It includes a key icon and two checkboxes at the top: 'Column 1 in Table is Primary Key' (checked, callout 1) and 'Auto-Increment Primary Key in column 1' (checked, callout 2). Below these is a button labeled 'Press to (Re)Generate Column of Keys' (callout 6). The form also has several input fields: 'Primary Key Type' (a dropdown menu set to 'Numeric', callout 3), 'Alpha Key Start Value' (a text box containing 'E00001'), 'Numeric Key Start Value' (a text box containing '1', callout 4), and 'Primary Key Name' (a text box containing 'ID', callout 5).

You can tell Auto ExcelForms that the active worksheet table has a primary key in column 1 by clicking the first checkbox <sup>1</sup>. All additions and edits will be checked for duplications or blank values. By clicking the second checkbox <sup>2</sup> the highest key value will be incremented and used as the key value for each new table row added.

If you wish to generate a whole column of keys for an existing or new table, you can use the lower section of this form to do it:

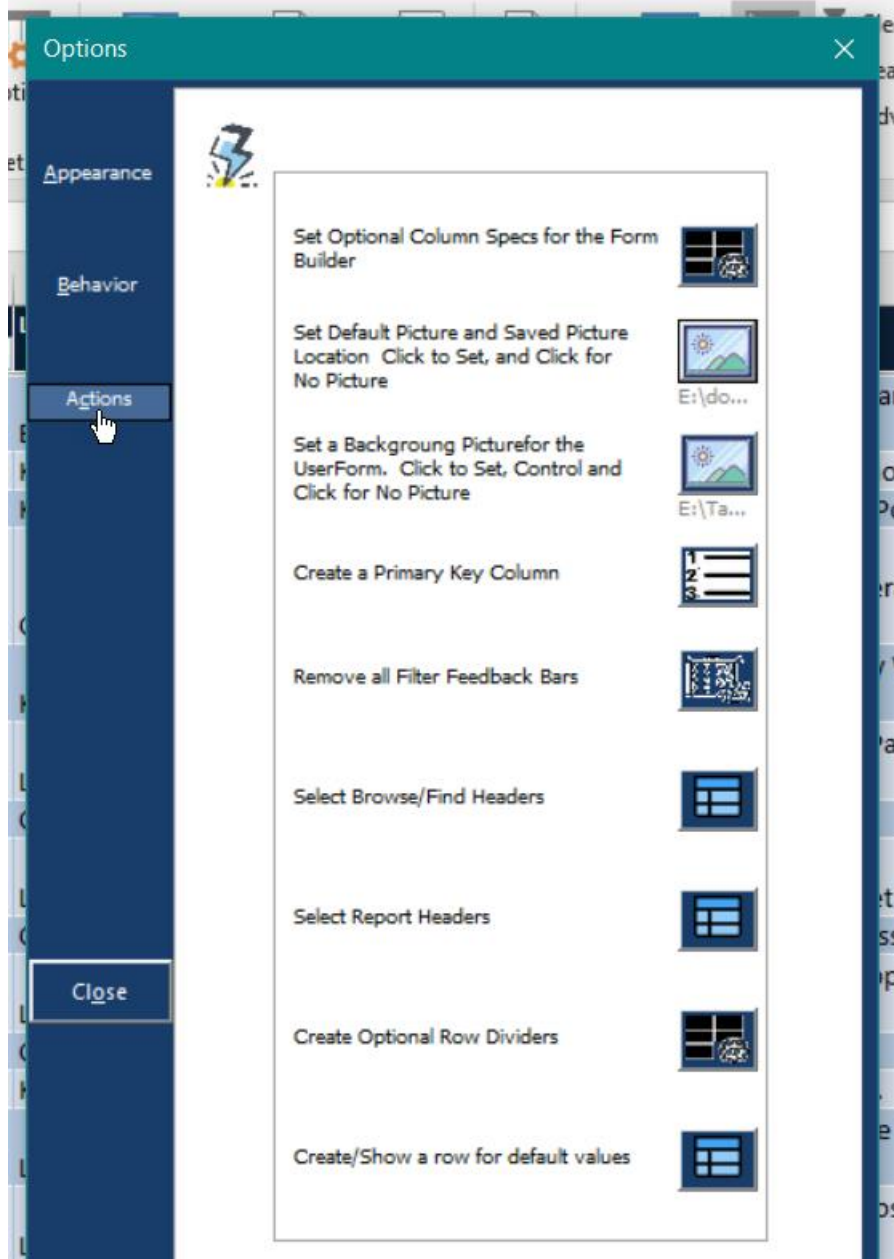
- Specify if you want numeric values or alpha values in <sup>3</sup>.
- The start value can be set in <sup>4</sup>.
- Specify the name of the table column to be used for the primary key in <sup>5</sup>.
  - If the Primary key name is the same as the name already there in the header of column 1 the key values will be **regenerated** for that column.
  - If the Primary key name is not the same as the one in column 1, **a new column with that name is added to the start of the table** and the key values generated there.

Click the button <sup>6</sup> to generate the primary key column.

You will first be prompted to select a worksheet to generate the primary key.

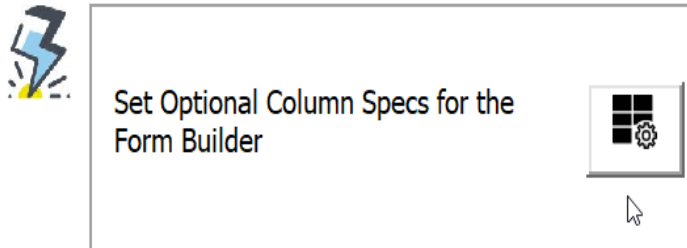
### 9.3 Application Options – Actions

Options Action Page - This is where the main action is!



This page will allow you to accomplish a tremendous amount of customization if you wish to do so. This includes, form building specifications, selecting columns to be used in the Browse/Find and Reports windows, and other activities.

### 9.3.1 Setting Optional Column Specifications for the Form Builder



Clicking the first button on Page 3 of the Applications Options form allows you to do comprehensive form customization without having to write a single line of code.

**N.B.** You can access this directly from the Ribbon item “Customise columns” on the extreme left of screen.

Full description of this functionality is covered in section 10

### 9.3.2 Set Default Picture and location

This page 3 option will allow you to choose the default picture that appears on the form. The user is presented with a file picker dialog to select a picture file. The location (directory) of this file is also saved as the default image location for pictures.



Set Default Picture and Saved Picture Location Click to Set, Control and Click to Clear for No Picture



When the image thumbnail for a table row is clicked, the user has an option to save the picture to the default location if the image reference is different from this default.

### 9.3.3 Set a Background Picture for the Userform

This option will allow you to choose a background image that will act as a “wallpaper” for the form. This will override any background colors in the data frame and form border.



Set a Background Picture for the UserForm. Click to Set, Control and Click for No Picture



E:\Ta...

You may have to manually set the label font color on page 1

The “picturesizemode” setting is Clip and “pictureTiling” is set to true. One strategy therefore, could be to select small image sizes (100x100 pixels or less) that will form an attractive symmetrical pattern when tiled, or alternatively a larger image that will approximately fill the form dimensions.

### 9.3.4 Create a Primary Key Column

This is identical to clicking the button on page 2 under “Primary Key Setup”. If you wish to generate a whole column of keys for an existing or new table it can be done here as well.

### 9.3.5 Remove all Filter Feedback Bars

Click this option to quickly remove any filter bars on any worksheet within the active workbook.

Normally, if you select a worksheet with a filter feedback bar and the option for feedback bars is “Temporary” or “Never”, the bar will be removed. This option will remove them all at once, and a message pops up to indicate how many were removed.



Remove all Filter Feedback Bars



### 9.3.6 Select Browse/Find Headers

Use this option to select which Table columns are included in the Browse/Find window.

By default, the Browse/Find window will include the first six (6) columns of the data table. The user can change this at any time on a table-by-table basis with the simple Dialog in this section.

Select Browse/Find Headers



Browse/Find Header Selection dialog

Select a worksheet from the drop down list in <sup>1</sup> then use the horizontal arrow buttons <sup>2</sup> to move your selections between the two window panes, one at a time or all at once. Clicking the “All at once” button will alternately clear the right window pane or fill it with the maximum number of headers. You can use the vertical arrows <sup>3</sup> to change the order in which selected columns will be displayed.

Remember to click on save <sup>4</sup> when satisfied with your selection.

### 9.3.7 Select Report Headers

Use this option to select which Table columns are included for Generated Reports.

By default, a table report will include the first ten (10) columns of the data table. The user can change this at any time on a table by table basis with the simple Dialog in this section.

Select Report Headers



Report Header Selection dialog

Select a worksheet from the drop-down list in <sup>1</sup> then use the arrow buttons <sup>2</sup> to move your selections between the two window panes, one at a time or all at once. Clicking the “All at once” button will alternately clear the right window pane or fill it with the maximum number of headers. You can use the vertical arrows <sup>3</sup> to change the order in which selected columns will be reported.

Remember to click on save <sup>4</sup> when satisfied with your selection. The headers in the right column will be used the next time a report is generated for that table.

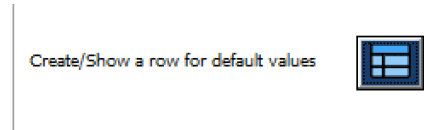


### 9.3.8 Create, Show or Hide a row for default values

This option will reveal a row that is located 2 rows above the table header and insert one if unavailable.

This row will allow you to enter default values whenever a new record is created.

When finished you can click the button again to hide the row. This row will also automatically be hidden when a form is launched.



You can enter a default value for any table column. Simply enter the desired default in the desired column but in the row that is 2 rows above the table header.

Constants or formulas can be used.

**Example (i):** Northwest entered in the column for Region will result in the constant value Northwest in that column for a new record.

**Example (ii):** Entered values can also be formulas such as `=TEXT(now(),"dd-mmm-yyyy")` which will result in 24-Jan-2024 for a new record on that date

**Example (iii):** You can use structured table references as well if you are sufficiently conversant with these. So that if one enters `=OFFSET(TableData[@Techs],-1,0) + 2` in the techs column the default new value will be the value in that column 1 row above plus 2. Keep in mind, though, that `Offset()` is a volatile function and can potentially slow down large complex workbooks.

### 9.3.9 Create Optional Row Dividers

Use this option to create a “Divider” Label and Line between form rows.

These optional dividers are very basic divisions within the form.

Create Optional Row Dividers



To set these up you will need to decide which row the divider will come before in the form. Keep in mind there are three (3) table columns for each form row. So, for example, to set up a divider before the second row, we must specify it in column three of the table.

If you opt for the 2 columns per row option layout then use even numbered columns to set up a divider before the next column.

The dialog to achieve this will explain how to do it.

#### Form Divider Dialog and AutoForm that was generated.



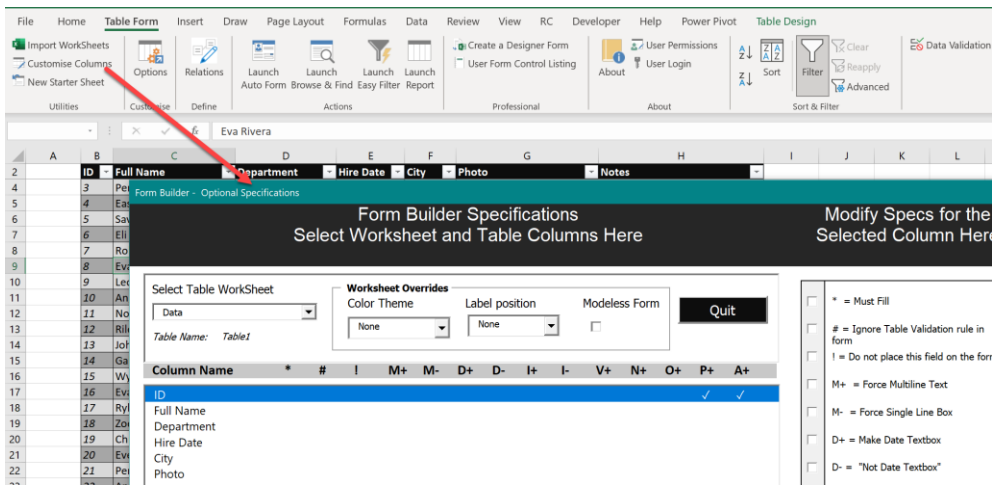
generated.

As stated, these are very basic and not much more can be done for an auto-generated form.

Of course, with the Pro version of Auto ExcelForms, an auto generated form can be saved as a permanent form in the Visual Basic Editor, and you can manipulate these by adding frames, boxes and other form objects

## 10 Customize columns on the form with the “Form Builder Specifications”

Clicking on the ribbon item “Customize Columns” under the TableForm tab will bring up the “**Form Builder Specifications**” form allowing you to customize the form generation results in granular fashion. It will allow you to control what happens when a form is auto-generated and over-ride some general application wide settings such as color.



## 10.1 Setting Optional Column Specifications for the Form Builder

Excel VBA programming and a lot of time would normally be required for customized Excel Userforms. With Auto ExcelForms it is a matter of a few clicks, as easy as 1-2-3. (not Lotus :-). Familiarize yourself with this interface and you will be customizing your forms in no time at all.

### Customization interface.

The basic three step process is:

- 1 Select a worksheet with the Table whose form needs customization
- 2 Select a table column that needs customization
- 3 Tick the parameter(s) that you want to apply for that table column

That's it, the next time you launch an auto-form for the selected table, these parameters will be applied.

Although these are fairly self-evident, a description of the individual parameters that can be changed are described in the following section.

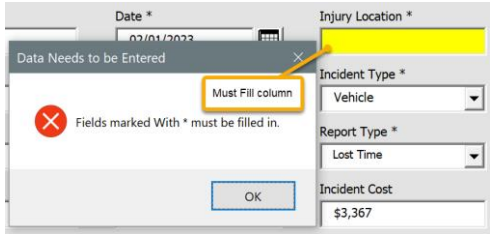
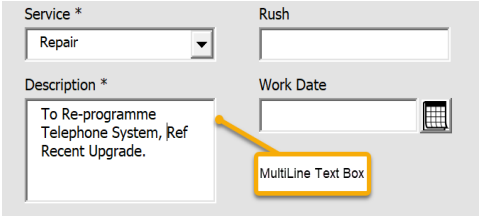


**Note:** When you select a table for column spec modification, any existing parameters are displayed in the table-column pane and are ticked off in the modification column where applicable. When you tick (or untick) a parameter, the change is immediately saved.

### 10.1.1 The Customization Parameters

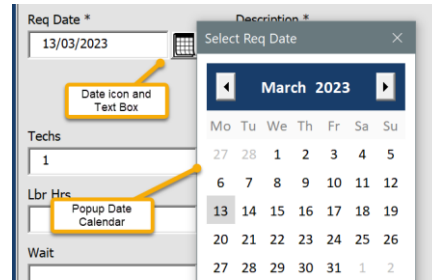
The customization parameters are optional indicators that can either provide additional functionality that the internal form builder cannot determine on its own, or override the auto form-builder defaults.

There is no need to be concerned with, or memorize the specification shortcuts like M+, !, D+ etc. These are used internally. However, pro users may find these useful later in customizing “designer forms”.

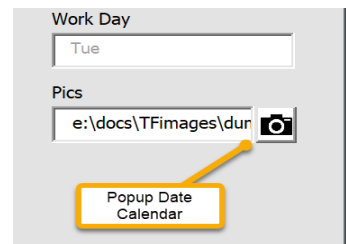
- \* **Must Fill** – Columns defined as “must-fill” will have an asterisk (\*) displayed to the right of the label on the form to alert the user that these fields must be filled in. Attempts to save a record to a table row with an empty text box will fail with an error message, focus will be set to the text box and its color highlighted:
 
- # **Ignore Table Validation rule in form** – This should not normally be needed, but if for any reason there is a need to avoid the table validation rule for this column before committing the form data to the table, then this option is available. Normally, with this option unticked, a data validation violation for that particular column will result in an error message and highlighting similar to the previous illustration. (Any custom validation fail message for that cell will be displayed).
- ! **Do not place this field on the form** – By default, all table columns will be represented on Auto-generated forms. You can override this for any individual columns of your choice. For example, columns with calculated cells.
- M+ **Force Multiline Text** – Use this option to specify that this column needs a text box that has text that would not normally fit in the standard text box and create a scrollable multiline box instead. By default, Auto ExcelForms will make one of these for any table column found with cells having more than 32 characters.
 
- M- **Force Single Line Box** – This option will override the Auto ExcelForms default of creating multiline boxes for columns with data having more than 32 characters. A normal single line box will be generated instead.

## The Customization Parameters Contd.

- **D+ Make Date Text box** – With table columns containing any dates, the form generator will create a date text box and a date icon with popup calendar, providing for date entry and date checks. You can force this behavior, for instance if the column has not been populated with any data yet.



- **D- Not Date Text box** – This will override the default date creation boxes and icons by Auto ExcelForms for the selected column. The form generator attempts to distinguish a real date from what appears to be a real date but is not. In some cases, there is no detectable difference. For instance, a 'unit of measure' column, that for some reason has an entry such as 1/8. If this column is formatted as text, then it would not be a problem. If however, it is not, you would have to use the "Not Date Text box" option to avoid generating date boxes and icons for this column.
- **I+ Make Picture Text box** – References to an image (such as *myphoto.jpg*) in a table column will be recognized by Auto ExcelForms and a special text box and icon created for that column to allow for Image management (*see section 4.3*). You can force this behavior for a table column with this option. Note, only one such column is allowed per table.
- **I- Not Picture Text box** – Use this option to suppress the default recognition of a table column as a Image/Picture column. This could be useful if your table has more than 1 column of images, and you wish to use the one that is not the first.



## The Customization Parameters Contd.

- **V+ – Make Combo Box, Drop-Down Lists, and Generate a Lookup/Validation Table**

Selecting this option for a table column (V+) does quite a lot in one step. When you next launch an AutoForm, the system will:

- Create a dropdown list for the worksheet table column.
- Display a combo box on the form for that column, using the same list.
- Generate a corresponding single-column lookup table, populated with any existing values from the column.

	A	B	C	D	E
1		District		Payment	
2		Central		Account	
3		East		C.O.D.	
4		North		Credit	
5		Northeast		P.O.	
6		Northwest		Warranty	
7		South			
8		Southeast			
9		Southwest			
10		West			
11					

	04	05	06
04	Northwest	Cartier	install
05	South	pez	Assess
06	East	rtier	Assess
07	North	pez	Replace
08	Northeast		
09	Southwest	kria	
10	West	Burton	Assess

If the column is empty (e.g., in a brand-new table), a ready-to-use expandable table is still created, so you can start entering your own lookup values. Either way, this makes setting up dropdowns a breeze.

The lookup table is stored on a worksheet named after the main table. For example, if your form is based on a table called TableData, then a worksheet called TableData\_Lookup is created to store all your lookup lists.

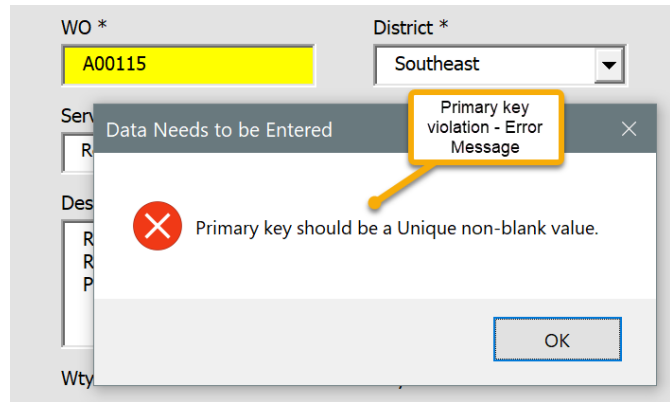
Once the AutoForm is launched and the setup is complete, the V+ entry is cleared from the column spec. You can always re-select it later if you want to repeat or reset the process.

- **N+ Force Numbers only** – Clicking on this option ensures that values entered on the form for this table column are numeric.



- **P+ Primary Key -**

This is the one section where you can set up a primary key other than in the first column. Remember, a primary key in a table is a column (text box on the form) that has two main characteristics, it cannot be empty, and must not be duplicated. If either of these is not true, a warning message will pop up and the user will not be able to transfer the form data to the worksheet. In this example, the user attempted to enter a work order number that already exists.



- **A+ Autoincrement Key** – This option is allowable for column 1 in the table. If this is ticked Auto ExcelForms will make this key “read-only in the table, disable entering or editing values in the form, and increment the largest value in the column for new entries.

## 10.2 Worksheet Override Options

On the column customization- Form Builder Specifications form you also have the option to override three of the application-wide options for the selected worksheet. They are:

1. **Form and worksheet color theme.** You can, for instance, apply a dark gray theme for a worksheet resulting in that color set being applied to the data forms, browsers, filter forms, reports and the worksheet itself, even though the main (default) color theme is blue.
2. **Arrangement of labels and controls.** By default, all forms are built with **either** Labels above and 3 columns of controls per form **or** Labels on the side and 2 columns per form. You can select a particular option to override this on a worksheet basis.
3. **Launch a Modeless form** for the selected sheet. By default, when a form is launched it is launched as "Modal". This means that users are prevented from interacting directly with anything other than the form until it is closed. For instance, they cannot click on the worksheet or anything else within Excel.

With the modeless option you can, for instance, click on another worksheet, copy some cell data and paste it on the form. You should use this option only if you actually need to do such things.

***You should note that once related tables are setup or detected (e.g. Excel data model), autogenerated forms will be launched non-modally to allow navigation between parent or child forms.***

### Worksheet Overrides

Form Builder - Optional Specifications

Form Builder Specifications  
Select Worksheet and Table Columns Here

Modify Specs for the Selected Column Here

Optional lookup Table and Return Column for the Selected Item

Select Table WorkSheet  
WOs

Table Name: TableData

**Worksheet Overrides**

Color Theme: None

Label position: None

Modeless Form: ☒

Quit

Column Name \* # ! M+ M- D+ D- I+ I- V+ N+ O+ P+ A+

WO																	
District																	
Lead Tech																	
Service																	
Rush																	
Req Date																	
Description																	
Work Date																	
Techs																	
Wty Lbr																	
Wty Parts																	

Override the application-wide options

\* = Must Fill

# = Ignore Table Validation rule in form

! = Do not place this field on the form

M+ = Force Multiline Text

M- = Force Single Line Box

D+ = Make Date Textbox

D- = "Not Date Textbox"

I+ = Make Picture Textbox

I- = "Not Picture Textbox"

V+ Make a validation Table

Click to Clear

Lookup Table Name: tblRates

Lookup Column Name: Techs

## 10.3 Lookup Table Popups

Drop down lists and comboboxes on the form help make it easier to enter accurate and consistent entries. Auto ExcelForms goes one step further by giving you the ability to popup an entire lookup table which can be searched to quickly retrieve a data item. This takes the form of a mini Browse/Find form very similar to the main Auto ExcelForms Browser/Finder.

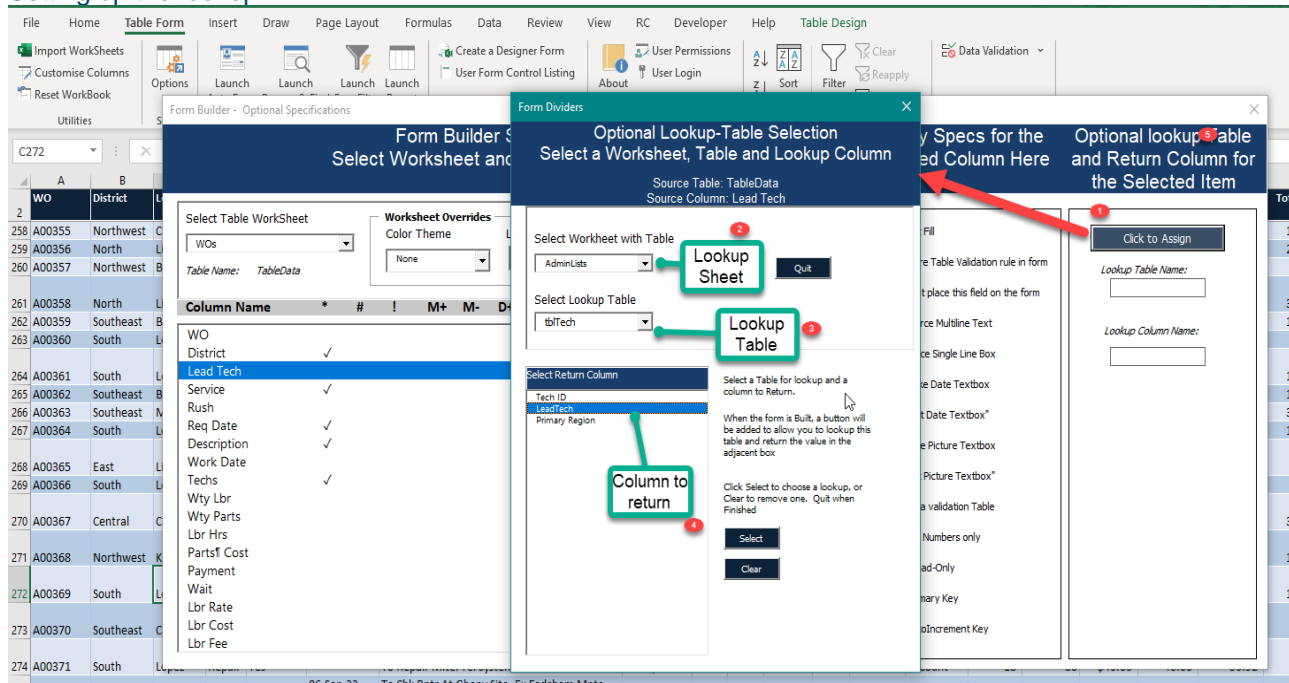
This is especially useful with longer lookup lists or where you need more context of the item being retrieved.

Once set up, an icon is created next to the textbox or combo box for that column which will generate the lookup form once clicked.

**Please note that these icons are now auto-generated for tables that have a related “Parent” table defined in the Excel data model, or in the Auto ExcelForms relationship manager.**

If you choose not to define any relationships, the feature can be manually set up here.

### Setting up the lookup



Setting up is quite straightforward.

1. Select a worksheet with the lookup table
2. Select the data table to pop up
3. Select the column with the data item to be retrieved
4. Click select



Note: If you wish you can also set up the order in which the popped-up lookup table columns are displayed. Just treat it as any other Browse/Find table and set this up as per section 9.3.7

### 10.3.1 Lookup Table Popups cont'd

After setting up as in the previous section, the Auto generated form will have a lookup icon and popup for the Techs column as follows:

#### Example Lookup Table

The screenshot shows an Excel form titled 'WOs Form' with various fields for work order management. A 'Lookup Icon' is highlighted on the 'Lead Tech' field. A 'Lookup Table' popup is open, showing a search for 'LeadTech' and a table of results.

**Lookup Table Data:**

LeadTech	Tech ID	Primary Region
Burton	1	Southeast
Cartier	2	Northwest
Khan	3	Central
Ling	4	West
Lopez	5	South
Michner	6	Northwest
Flynn	7	East
Thomas	8	Northwest
Roberts	9	North

**Form Fields and Values:**

- WO: A00370
- District: Southeast
- Lead Tech: Lopez
- Service: Repair
- Rush: Yes
- Reg Date: 06/09/2023
- Description: To Repair 1 Bravo A/n Pager /disabled On Screen
- Work Date: 17/09/2023
- Wty Lbr: \$70.82
- Parts: \$70.82
- Payment: C.O.D.
- Wait: 11
- Lbr Hrs: 0.25
- Lbr Rate: 80
- Lbr Cost: \$20.00
- Lbr Fee: 20.00
- Total Cost: 90.82
- Total Fee: \$ 90.82
- Req Day: Wed
- Work Day: Sun
- Notes: 98.01.19 Attention Anju/rental Admin Please Take Note Of Technician's Findings On This Rental Unit And Issue
- Pics: [Camera Icon]

**Background Table Data:**

0.50	\$45.29	Account	21	140	\$70.00	70.00	
0.25	\$11.70	Account	8	80	\$20.00	20.00	
0.25	\$37.71	P.O.	113	80	\$20.00	20.00	
1.00	\$155.04	C.O.D.	12	80	\$80.00	80.00	
1.25	\$93.60	P.O.	22	80	\$100.00	100.00	
0.25	\$21.33	Account	20	80	\$20.00	20.00	
2.50	\$357.11	Account	61	80	\$200.00	200.00	
0.25	\$120.00	C.O.D.	8	80	\$20.00	20.00	
0.50	\$52.35	C.O.D.	15	80	\$40.00	40.00	

## 11 Using AutoExcelForms with Protected Worksheets.

AutoExcelForms works with protected Excel worksheets, including those that use passwords for protection. Since certain operations, like adding, deleting, or editing table rows require the worksheet to be temporarily unprotected, AutoExcelForms must know how to do this safely and automatically.

This section explains how to securely authorize AutoExcelForms to unprotect and re-protect your sheets without requiring you to enter a password every time you open a form.

### 11.1 Protection without a password.

If your worksheet is protected without a password (e.g. just to prevent accidental changes), AutoExcelForms handles this automatically. The form will unprotect the sheet, perform its operations, and re-protect it upon closing, all with no setup needed on your part.

### 11.2 Protection With a Password — Assigning Passwords via the UI

If your worksheet is protected with a password, you'll need to let AutoExcelForms know the password so it can unprotect and re-protect the sheet during form usage. You can now do this easily through the AutoExcelForms UI ... no need to manually enter anything in worksheet cells.

The screenshot shows the AutoExcelForms Options Form (Actions Page) with a dialog box titled "Worksheet Unprotection Passwords" open. The dialog box contains the following fields and buttons:

- Worksheet Name:** A dropdown menu showing "orders".
- Password:** A text field containing "\*\*\*\*\*".
- Confirm Password:** A text field containing "\*\*\*\*\*".
- Buttons:** "Assign", "Assign to All", and "Quit".

In the background, the "Worksheet Protection Data" button is highlighted with a red arrow. The background form also shows sections for "Set Default Picture and Saved Picture Location" and "Set a Background Picture for the UserForm".

From the **Options Form** (Actions Page), click the "**Worksheet Protection Data**" button. This opens a dialog with:

- A dropdown list showing all sheets in the workbook (defaults to the active sheet).
- Two password entry fields: one for the password and one for confirmation.
- Two buttons: Assign and Assign All.

To assign a password:

- Select the sheet (or leave it as the active sheet).
- Enter the sheet's protection password and confirm it.
- Click Assign to authorize AutoExcelForms to use that password for unprotecting/re-protecting that sheet.

To assign the same password to all sheets in the workbook, click Assign All after entering and confirming the password.

Passwords are securely stored for internal use only. Once assigned, AutoExcelForms can seamlessly handle password-protected sheets in this workbook — opening forms, editing data, and restoring protection automatically when done.

### 11.3 What About Previously Used Manual Methods

In earlier versions, users could optionally enter passwords manually into a hidden "spec row" above each table. This approach is no longer necessary. The new Assign Sheet Password feature is more user-friendly, secure, and avoids the need to unhide rows or directly modify worksheet content.

### 11.4 Code Protection Method (Pro Version only)

AutoExcelForms is fully functional without requiring any VBA knowledge. However, for advanced users with the Professional version, there is an alternative method of handling password-protected sheets, directly via the VBA editor.

This method is useful if:

- You prefer not to use the Assign Password UI.
- You want to hardcode a sheet protection password into the form logic.
- You are building a workbook to be distributed with pre-configured behavior.

The method is as follows:

- Open The VB Editor
- Locate the code module for the userform named AutoFormTemplate.
- Find the procedure named Unprotect\_BeforeForm (it's usually the third procedure in the module).
- Uncomment the three lines that refer to sheet unprotection and replace "54321" with your actual worksheet password in each line:

```
Sub Unprotect_BeforeForm()
    Dim ws As Worksheet, sPass As String
    On Error GoTo HandleError

    Set ws = FormSheet

    ' 'If setting password in code uncomment this block of code
    ' *****CODE PASSWORD SETUP*****
    'ws.Unprotect Password:="54321"
    'SetPassword ("54321") ' will enter it in col 1 above header, hide it and encrypt it
    'ws.Protect Password:="54321" ' reprotect for subsequent test

    'if sheet was protected and password was entered in col 1 above header use it here
    If TestPasswordProtection Then
        sPass = GetPassword
        ws.Unprotect Password:=sPass
        colSpecProtection = True
    End If
End Sub
```

This ensures the worksheet is unprotected before the form runs, and re-protected afterward.

**Important:**

This code runs for all forms generated from any table.

If you only want to apply this password to a specific worksheet, wrap the code in a conditional block like this:

```
If ws.Name = "MySheetName" Then
    ws.Unprotect "YourPassword"
    SetPassword("YourPassword")
    ws.Protect Password= "YourPassword"
End If
```

Etc.



## 12 Working with Related Tables

AutoExcelForms does more than just generate forms — it understands your data relationships.

### *Why define relationships between tables?*

By linking tables based on shared fields (like a Customer ID or Product Code), you avoid repeating data across multiple tables — reducing errors, keeping records consistent, and simplifying data entry.

### 12.1 Core functionality

Whether you're using Windows or Mac, AutoExcelForms gives you the ability to view, navigate, and validate related records across multiple Excel tables — all without writing a single line of code.

1. **On Windows**, AutoExcelForms can detect table relationships from two sources:
  - The built-in *Excel Data Model* (such as those defined in Power Pivot), or
  - AutoExcelForms' own lightweight *Relationship Manager* — ideal for users who don't use Power Pivot or prefer a simpler setup.
2. **On Mac**, where Excel does not include the Data Model, AutoExcelForms still provides relationship functionality via its built-in Relationship Manager. This allows you to define and work with parent-child table links for intuitive data entry, navigation and assistance with referential integrity.

**(Note: This does not provide advanced analytical features such as Power Pivot, DAX, or relational queries — which are natively provided by Excel for windows but not included in Excel for Mac.)**

Once relationships are defined, AutoExcelForms can automatically:

- Display **parent record details** from lookup tables as you navigate or edit related records
- List **child records** dynamically in scrollable forms with powerful search and filter tools
- **Autogenerate a Lookup icon** beside foreign key fields (fields that reference values in another table) that open a searchable list of parent records — simply click to select and autofill in the entry field value. Great while adding or editing.
- Enforce **referential integrity**, warning you about missing parent keys or related child records on attempted deletion or edits.

This section will explain how to set up, visualize, and benefit from these relationships across platforms — helping you turn your Excel tables into a more intelligent, connected solution.

## 12.2 Relations in action – Example

In the following scenario, Let's say a user opens an AutoExcelForms-generated form based on a *Sales* table. This Sales table avoids repeating product and salesperson details. Instead, it links to separate Product and Salesperson tables — a structure designed for Power Pivot and clean reporting.

That structure is excellent for summary reports and analysis — but it makes data entry and record review in Excel painful. Without AutoExcelForms, users would need to create clunky lookup formulas to interactively view related details, and entering new records would be error-prone.

With AutoExcelForms, it takes just two clicks to remove those barriers:

### A floating “parent” display window

The screenshot illustrates the AutoExcelForms interface. The background is an Excel spreadsheet with a 'Sales' table. The table has columns: Salesperson ID, Geography, Product ID, Date, Amount, and Boxes. A floating window titled 'Global Sales Data Form' is open, showing the current record (Record 35 of 356). The form has fields for Salesperson ID, Geography, Product ID, Date, Amount, and Boxes. A red arrow points from the 'Salesperson ID' field in the table to the 'Salesperson ID' field in the form. Another red arrow points from the 'P' icon next to the 'Salesperson ID' field in the form to a 'Related Table - tblTeam on Worksheet - Sales Team' window, which shows a list of salesperson details.

When the user opens the form, AutoExcelForms generates the usual editable fields based on the *Sales* table — but also detects that a relationship exists between *Sales* and other tables (via Power Pivot or the built-in Data → Relationships dialog, or the simple Auto ExcelForms Relationship manager described later).

For each related parent table, AutoExcelForms automatically adds two small clickable icons next to the relevant field:

- A **“P” icon** that brings up a read-only parent display
- A **Search icon** (magnifying glass) for browsing and selecting parent records

In the example above, the user clicks the **“P” icon** beside the Salesperson ID field. Instantly, a **floating window** appears showing the full *Salesperson* details. As the user navigates the *Sales* table via the main form, the data in the floating window updates in real time — no setup or coding required.

But what if the user is adding a new *sales* record, or wants to change the *salesperson*? Instead of flipping through sheets or scrolling endlessly, they can simply click the **search icon** — the magnifying glass next to the Salesperson ID field.

Using the search icon to find a parent record when adding or editing.

Salesperson ID	Sales person	Team	Office	Commission %
SID-0001	Barr Faughny	Yummies	Auckland	3.7%
SID-0002	Dennison Crosswaite	Yummies	Auckland	1.3%
SID-0003	Gunar Cockshoot	Yummies	Auckland	2.0%
SID-0004	Wilone O'Kietl	Delish	Auckland	1.5%
SID-0005	Gigi Bohling	Delish	Auckland	2.2%
SID-0007	Kaine Padly	Delish	Auckland	4.9%
SID-0008	Ches Bonnell	Tempo	Auckland	3.2%
SID-0009	Andria Kimpton	Jucies	Auckland	2.2%
SID-0010	Brien Boise	Jucies	Auckland	4.4%

This opens a searchable lookup list of all records in the *Salesperson* table. The list shows multiple columns — such as *name*, *region*, and *ID* — and lets the user quickly filter by any field. As they type, the list narrows instantly.

In the illustration the user wishes to change the *salesperson* on the sales record and knows that the *salesperson* is from the Auckland location.

In just a couple keystrokes, the user quickly narrows the search to find the correct individual and clicks to select. The correct ID is automatically entered into the field — no typos, no guesswork, no manual lookup needed.

**Very powerful, not a single formula or line of code.** This was data-driven based on the relationship model.

## 12.3 Continuing the Example: Viewing Related Child Records

So far, we've viewed the data from the perspective of a child table — in this case, a Sales record that looks up details from two related parent tables: tblProducts and tblTeam (for products and salespeople). Each sale is linked to a single product and a single salesperson — classic one-to-one relationships from the sales record's point of view.

But from the parent perspective — say, tblTeam — the relationship is one-to-many: each salesperson can appear in dozens of sales records. AutoExcelForms handles this seamlessly.

When you launch a userform for a parent table (like tblTeam), AutoExcelForms detects the child relationships and automatically adds a clickable “C” icon next to the relevant field. Clicking this icon opens a floating window that shows all related child records.

This child record view is dynamic, scrollable, and includes:

- Column-based search
- Case-sensitive or insensitive matching
- Partial or exact match filtering

As the user navigates through the parent table with the main form (viewing different salespeople), the child window updates automatically to show all linked sales records in real time.

### Floating window with Child records

The screenshot shows the AutoExcelForms interface. The main form is titled 'Sales Team' and displays a table with columns: Salesperson ID, Sales person, Team, and Office. The table contains records for Curtice Advani and Kaine Paddy. A red arrow points from the 'C' icon next to the 'Sales person' field to a floating window titled 'Sales Team Form'. This window displays a search interface with a 'Search By' dropdown set to 'Geography' and a 'Search For' field. Below the search fields is a table of related child records. The table has columns: Geography, Date, Amount, tblTeam Sales person, tblTeam Team, and tblProducts Product. The table lists various sales records for Kaine Paddy. A red arrow points from the 'C' icon next to the 'Sales person' field in the main form to the 'Sales person' field in the floating window. The floating window also displays a 'Record 7 of 24' status bar.

For any field having more than one child table, clicking on its “C” icon pops up a small selection window allowing you select which table of related records to view as you navigate the main form.

No setup. No formulas. No code.

Just data-driven insight — **powered entirely by the table relationships you've defined.**

The following example illustrates a table that has both related “Parent” and “Child” tables.

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If the user chooses to launch windows for each, they will be **updated simultaneously** as the user navigates the main table using the main data form. In this case, customer detail as well as related order items for this order are displayed as the user navigates the table.

The screenshot displays the Auto ExcelForms application interface. The main window shows a table with columns: orderid, unitprice, quantity, discount, and tblProducts productname. The table is filtered to show records for orderid 11035. A red arrow points from the 'customerid' field in the main table to the 'customerid' field in the 'Related Table - tblCustomers on Worksheet - customers' form. Another red arrow points from the 'orderid' field in the main table to the 'orderid' field in the 'Related Table - tblOrderDetails on Worksheet - order\_details' form.

**Related Table - tblCustomers on Worksheet - customers**

customerid	SUPRD
companyname	Suprêmes délices
contactname	Pascale Cartrain
contacttitle	Accounting Manager
address	Boulevard Tirou, 255
city	Charleroi
region	#N/A
postalcode	B-6000
country	Belgium
phone	(071) 23 67 22 20

**Related Table - tblOrderDetails on Worksheet - order\_details**

orderid	unitprice	quantity	discount	tblProducts productname
11035	18.00	10	0.00	Chai
11035	18.00	60	0.00	Steakya Stout
11035	14.00	30	0.00	Singaporean Hokkien Fried Mee
11035	7.45	10	0.00	Tourtière

Record 788 of 830

## 12.4 Related Table Navigation – The “Open Form” Button

From any floating related window — whether parent or child — you can click the **“Open Form”** button to drill deeper into the related data.

Clicking this button will:

- Close the current **main/home form**.
- Navigate to the worksheet containing the **related table**.
- Open a **full-featured AutoForm** for that related table, with the corresponding record automatically selected.

This enables seamless transitions between related tables for viewing, editing, or adding records — all without needing to search manually.

### Example:

If you're viewing a **Customer** form and click the **“C” (Child)** icon, a floating window appears showing all **Orders** for that customer. You can select Order **10380** in the list, then click **“Open Form”** (or just double-click the item). The Customer form will close, the Orders worksheet is activated, and a full Orders form opens directly at Order 10380.

You can navigate back to the customer just as easily by clicking the **“P” (Parent)** icon on the Orders form — bringing up the corresponding Customer record in its own form.

Like much of AutoExcelForms, this navigation is faster and more intuitive in practice than it may sound in description.

### The “Open Form” Button

The screenshot displays the AutoExcelForms application interface. At the top is a ribbon with tabs: File, Home, Table Form, Insert, Draw, Page Layout, Formulas, Data, Review, View, RC, Developer, Help, Power Pivot, and Table Design. Below the ribbon is a list of tables: tblOrders, tblCustomers, tblEmployees, and tblEmployees. The 'tblOrders' table is selected, and a context menu is open over it. The menu includes options like 'Search By', 'Search For', 'Close/Quit', 'Open Form', 'Case Sensitive Search', and 'Exact Match'. The 'Open Form' button is highlighted with a red box. A tooltip above the button reads 'Navigate to Order 10380 on Orders worksheet'. In the background, a 'customers Form' window is visible, showing fields for customerid, companyname, contactname, contacttitle, address, city, region, postcode, country, phone, and fax. The 'customerid' field is set to 'HUNGO'.

orderid	orderdate	companyname	tblEmployees	tblEmployees	notes
10288	30/06/2022	Hungry Owl All-Nig	Soyama	Michael	Michael is a graduate of Sussex University (
10309	13/09/2022	Hungry Owl All-Nig	Leverling	Janet	Janet has a BS degree in chemistry from Bo
10335	16/10/2022	Hungry Owl All-Nig	King	Robert	Robert King served in the Peace Corps and
10373	29/11/2022	Hungry Owl All-Nig	Peacock	Margaret	Margaret holds a BA in English literature fr
10380	04/12/2022	Hungry Owl All-Nig	Callahan	Erin	Erin is a graduate of Sussex University (
10429	23/01/2023	Hungry Owl All-Nig	Leverling	Janet	Janet has a BS degree in chemistry from Bo
10503	05/04/2023	Hungry Owl All-Nig	Suyama	Michael	Michael is a graduate of Sussex University (
10516	18/04/2023	Hungry Owl All-Nig	Fuller	Andrew	Andrew received his BTS commercial in 197
10567	06/06/2023	Hungry Owl All-Nig	Davolio	Nancy	Education includes a BA in psychology from
10646	21/08/2023	Hungry Owl All-Nig	Dodsworth	Anne	Anne has a BA degree in English from St. Lu
10661	03/09/2023	Hungry Owl All-Nig	King	Robert	Robert King served in the Peace Corps and
10687	24/09/2023	Hungry Owl All-Nig	Dodsworth	Anne	Anne has a BA degree in English from St. Lu
10701	07/10/2023	Hungry Owl All-Nig	Suyama	Michael	Michael is a graduate of Sussex University (

## 12.5 Referential Integrity

If you've ever ended up with mismatched data in Excel — like records that reference codes or values that no longer exist — you've seen what happens when *referential integrity* is missing.

**Referential integrity** is a data principle that ensures links between related tables stay valid. In simple terms:

- You shouldn't be able to enter a reference to something that doesn't exist.
- And you shouldn't delete something if other data still depends on it.

Excel doesn't enforce this automatically. While features like *Data Validation* can help in basic scenarios, there's no built-in mechanism to prevent someone from deleting or changing a key record in one table, leaving others full of broken references.

### 12.5.1 Why does this matter?

Let's say you're tracking student enrollments. You have one table with **student enrollments** and another listing **courses**. Each enrollment record points to a Course ID. Now imagine someone edits the course table and accidentally deletes or renames a Course ID — suddenly, the student records are referencing a course that no longer exists. You'd only notice the problem much later, when reports don't match or values are missing.

### 12.5.2 How AutoExcelForms helps with this.

When you define relationships between your tables (using either Excel's Data Model or AutoExcelForms' own Relationship Manager), AutoExcelForms automatically steps in to enforce referential integrity — quietly, in the background, every time a form is used.

Here's what happens when you launch a form to view, add, or edit data:

#### 1. Foreign keys are validated — and assisted

You can't enter or change a value in a foreign key field (like Course ID) unless that value exists in the related parent table. But AutoExcelForms doesn't just block invalid entries — it helps you get it right.

Next to every field with a parent relationship, you'll see a small **"P" icon** and a **search icon (magnifying glass)**. Click the magnifying glass to open a powerful search window, where you can find and select a valid record from the parent table using any field as a filter. This makes it easy to find the right record — and ensures it's valid.

#### 2. Deletion is protected

If you try to delete a record from a parent table (like a course), and that course is still being referenced in another table (like student enrollments), AutoExcelForms will stop you — and alert you that other records depend on it.

#### 3. Primary keys can't be accidentally changed

If a record in a parent table has dependent records elsewhere, you won't be able to change its key



value (like modifying a Course ID) unless you first update or remove the related records. This keeps everything aligned and avoids silent breakage.

### 12.5.3 A safety net for real-world spreadsheets

Excel isn't a database manager — but many users rely on it to track structured, interconnected data. Whether you're managing staff assignments, customer transactions, or inventory, if your workbook includes more than one table, keeping those links consistent is critical. AutoExcelForms adds a layer of protection where Excel falls short — without requiring formulas, VBA, or technical setup

#### Referential Integrity strictly enforced

The screenshot shows the AutoExcelForms interface with a spreadsheet containing a table of staff data. The table has columns: Lead Tech, Full Name, Hourly Rate, Hire Date, Phone No, Address 1, and Address2. The data includes records for Burton, Cartier, Khan, Ling, and Michner. A 'Techs Form' dialog is open, showing the details of a record for 'Burton'. A 'Deletion Prohibited' warning box is shown, stating that the key value 'Burton' is linked to data in another table, and deletion is not allowed for this key value.

Lead Tech	Full Name	Hourly Rate	Hire Date	Phone No	Address 1	Address2
Burton	Andrew Burton	70.00	21-03-20	734-580-5795	2105 Rowley Ave	Madison, Wi
Cartier	Richard Cartier	90.00	12-02-99	360-371-7747	3780 Mango Blvd.	Milwaukee, WI
Khan	Zainool Khan	70.00	03-11-16	112-784-8144	899 First Street	Madison, Wi
Ling	Keith Ling	70.00	04-05-14	738-140-4140	6322 Koch Street	Gren Bay, Wi
Ling	Manuel Lopez	80.00	06-09-22	876-811-3735	8317 Davis Ave.	Milwaukee, WI
Michner	Sally Michner	120.00	03-10-05	965-884-0562	6522 Third Street	Gren Bay, Wi

The 'Techs Form' dialog shows the following details for the selected record:

- Lead Tech: Burton
- Full Name: Andrew Burton
- Hourly Rate: 70.00
- Hire Date: 21/03/2020
- Phone No: 734-580-5795
- Address 1: 2105 Rowley Ave
- Address2: Madison, Wi

The 'Deletion Prohibited' warning box states: "Key value 'Burton' is linked to data in: Table.....TableData Worksheet....WOs. Deletion is not allowed for this key value."

### 12.5.4 Built-in flexibility: "Strict enforcement" option

By default, referential integrity is strictly enforced — deletions or edits to parent records are blocked if related (child) records exist. However, AutoExcelForms also recognizes that there are cases where users may need to proceed with full awareness.

In the **Relationship Manager**, there's an option labeled **"Strict enforcement for child deletions and edits"**, which is normally set to **Yes**. If a user with sufficient access changes it to **No**, then attempts to delete or edit a parent record will still trigger a warning — but the user can choose to proceed after confirming via a prompt. This balances protection with control and may be useful in more advanced workflows.



Note: If you wish to work with related tables and ensure data integrity, remember to protect your worksheet. This will ensure accidental edits don't occur via the worksheet and that only Auto ExcelForms will be used for data input.



## 12.6 Defining Relationships

Relational data models allow you to connect information across multiple tables, making your forms far more powerful. AutoExcelForms supports two approaches for defining these relationships:

### 12.6.1 Option 1: Use the Excel Data Model

If you choose to use the Excel Data Model, any relationships previously created using **Data > Relationships** or via Power Pivot will be honored by AutoExcelForms. These relationships drive parent-child behaviors such as linked forms and referential checks.

**Important:** If you rename tables used in the Excel Data Model, make sure to rename them from within **Power Pivot**, not directly on the worksheet. Changes made only on the sheet won't be reflected in the relationship metadata — this is a known Excel limitation, not unique to AutoExcelForms.

Although the Excel Manage Relationships dialog may appear unfamiliar to some users, it's typically used by those already comfortable with Power Pivot. For that reason, instructions on its use are not reproduced here. However, if selected, AutoExcelForms will detect and interpret its relationships automatically.

Please note: If you've chosen to use the Excel Data Model in your workbook along with AutoExcelForms, the very first time you open a form with related tables, there may be a short delay (typically 3–4 seconds). This happens because Excel is initializing the Data Model. It's a one-time delay per session and is a normal behavior of Excel—not AutoExcelForms—similar to the initial load time when opening Power Pivot.

### 12.6.2 Option 2: Use the AutoExcelForms Relationship Manager

For users who want an Excel-native method, AutoExcelForms provides a built-in **Relationship Manager** that requires no use of Power Pivot or the Excel Data Model.

#### **Example**

*Consider a workbook with the following two tables:*

- A **Salesperson** table with a unique **Salesperson ID** (primary key)
- A **Sales** table that itemizes sales made by a salesperson, where each row includes a link to that salesperson via their **Salesperson ID** (foreign key)

*This is a classic one-to-many setup: one salesperson may have many sales.*

In **AutoExcelForms**:

- The **Salesperson** table is the **Parent Table**
- The **Salesperson ID** column is the **Parent Column**
- The **Sales** table is the **Child Table**
- The **Salesperson ID** in Sales is the **Child Column**

### Terminology Comparison

If you're familiar with Excel's Power Pivot relationship editor:

- AEF's **Parent Table / Column** = Excel's **Related Table / Primary Key**
- AEF's **Child Table / Column** = Excel's **Table / Foreign Key**

AEF presents the parent first, which more clearly reflects the real-world direction of the relationship — for example, a salesperson generates sales, not the other way around.

## 12.6.3 Using the Relationship Manager Form

The form consists of four **combo boxes**:

- **Parent Table**
- **Parent Column**
- **Child Table**
- **Child Column**

These boxes are populated with all recognized tables and columns from the active workbook. When you select a table, its matching column dropdown is automatically filtered to show only its columns.

To **add a relationship**:

1. Click the **New** button. All dropdowns clear.
2. Select a parent table and column, and then a child table and column.
3. Once any changes are made, a **Save** button appears (instead of requiring an “Edit” button, consistent with other AutoExcelForms forms).
4. The Save button is enabled and visible only when all four dropdowns are filled and the parent/child tables are distinct.

The Table Relationship manager

## Auto ExcelForms

The screenshot displays the AutoExcelForms application interface. The top ribbon includes tabs for File, Home, Table Form, Insert, Draw, Page Layout, Formulas, Data, Review, View, RC, Developer, Help, Power Pivot, and Table Design. The Table Design tab is active, showing options like Import Worksheets, Customise Columns, New Starter Sheet, Options, Relations, Launch Auto Form, Launch Browse & Find, Easy Filter, Report, Create a Designer Form, User Form Control Listing, User Permissions, User Login, About, Sort, Filter, Clear, Reapply, Advanced, and Data Validation.

The main window shows a table with columns: Salesperson ID, Geography, Product ID, Date, Amount, and Revenue. The table is filtered for 'New Zealand' and '25-Jan-22'. A dialog box titled 'AutoExcelForms Table Relationships' is open, showing the following configuration:

Parent Table	Parent Column	Child Table	Child Column
tblTeam	Salesperson ID	tblSales	Salesperson ID
tblProducts	Product ID	tblSales	Product ID

The dialog box also includes a 'Report' button and a section for 'Use the Excel Data Model or this Form to Manage table Relationships' with radio buttons for 'AutoExcelForms' (selected) and 'Excel Data Model'. A 'Strict Enforcement for child Edits and Deletions' section has radio buttons for 'Yes' (selected) and 'No'.

A help window titled 'Defining Table Relationships' is also open, providing information about table relationships and how they are defined in AutoExcelForms. It explains that parent tables have a primary key, and child tables have a foreign key that points to the parent's primary key. It also notes that the parent table is listed first in the relationships, reflecting the logical direction of the relationship.

To **edit** a relationship:

- Select an item in the **relationship listbox**. The four combo boxes will populate with its details.
- Modify any field. The **Save** button appears automatically.
- Click Save to commit your change.

To **delete** a relationship:

- Select it from the listbox and click **Delete**.

Although this may sound involved, the layout and workflow are intuitive. The Save button appears contextually whenever edits or new entries are detected.

### ***Additional Options on the Manager Form***

There are two pairs of option buttons.

Both these options take effect immediately and can be changed at any time.

#### **Relationship Source:**

*"Use the Excel Data Model or this form to manage table relationships"*

AutoExcelForms – Use relationships defined in this form

Excel Data Model – Use built-in Power Pivot/Excel relationships

#### **Enforce Integrity**

*"Strict Enforcement for Child Edits and Deletions"*

Yes (default) – Child rows referencing a parent cannot be deleted or reassigned

No – Users are warned of dependent records but may proceed after confirming

*This setting enforces referential integrity, a key database concept that prevents data inconsistencies. However, for flexibility, administrators may relax enforcement when needed.*

#### **Report Button**

The form also includes a **Report** button. When clicked, and upon user confirmation, this generates a summary of all defined relationships and outputs it to a worksheet named **"Workbook Relationships."**

- If the worksheet does not already exist, it will be created automatically.
- Relationships defined in the **Excel Data Model** are listed first, followed by those defined using the **AutoExcelForms Relationship Manager**. Each set appears in its own clearly labeled table for easy comparison.

#### **Helpful Tooltips and Terminology Guide**

To assist new users, the Relationship Manager form includes built-in guidance:

- **Terminology Help** — Click the **question mark (?) button** to view a quick reference guide explaining key terms such as *Parent Table*, *Child Table*, *Primary Key*, and *Foreign Key*.
- **Hover Tooltips** — Hover your mouse over any control on the form to see a brief explanation of its purpose and how to use it.

## 12.6.4 Summary

Relationships allow your forms to function with rich, linked behaviors. Whether you're using Power Pivot or AutoExcelForms' internal manager, you can:

- Show parent details from a child record
- Dynamically List and filter child records for a parent
- Prevent invalid deletions or foreign key mismatches

## 13 Administration – User access and Logins

When first installed, the user has access to all the functionality of Auto ExcelForms. By default, the end-user has full administrative rights and there is no need to do anything further.

However, if you wish, it is possible to allow different access rights for others who make use of the add-in, in a very granular fashion.

You can, for instance, setup a user who can use the data form for adding and editing data but cannot do deletions of data records. You can, for instance, optionally control access to reporting, or access to setting up configuration options on an individual basis.

All this is done in Auto ExcelForms by using the “**User permissions**” and “**User Logins**” menu items on the ribbon. As an administrator, you can allow end users to select a user name and enter a password for access. Their access rights will be determined once they login.

### 13.1 The Admin Worksheet

Click on the User Permissions item on the Table form menu to bring up the access rights screen as seen below.

#### User Permissions/Access screen

The screenshot displays the 'User Access Rights' interface within the Auto ExcelForms application. The main window shows a table of users and their permissions. The 'User Access Control' dialog box is open, allowing the user to manage access for a specific user (Sarah). The dialog includes fields for 'User Name' and 'Password', and a section for 'All Functions' with checkboxes for various permissions. The 'Users Access Worksheet' is highlighted in the bottom ribbon.

User Name	All	Add	Edit	Delete
Admin	✓	✓	✓	✓
John	✗	✗	✗	✗
Joe	✓	✗	✗	✗
Ricky	✗	✗	✗	✗
Sarah	✗	✗	✗	✗
John22	✗	✗	✗	✗

Annotations in the image:

- Indicates that Sarah is restricted from adding data (points to the 'Add' column for Sarah).
- Indicates that Sarah can edit data (points to the 'Edit' column for Sarah).
- Click on a checkbox to allow or restrict access (points to the 'Add Records' checkbox in the dialog).
- Users Access Form (points to the 'User Access Control' dialog box).
- Users Access Worksheet (points to the 'Users Access' worksheet in the bottom ribbon).

The first record (Admin) cannot be deleted or edited, except for the password. The default password for this Admin user is **admin** (Lower case). You can edit and use other existing entries as you wish. You can also add more if needed.

For each user, enter a name and password. This password is masked with a \* in the usual manner for passwords. **Passwords need to be at least 5 characters in length and are case sensitive.** User names are not case sensitive.

## 13.2 The Login Screen

You can change what can be accessed within Auto ExcelForms by logging in as a different user, with credentials, established by the administrator (Section 11.1).

1. Click “User Login” on the menu.
2. Enter a valid username and password then
3. click Ok or hit Enter on the keyboard.

### The Login Form

The screenshot shows the Auto ExcelForms application window. The 'Table Form' tab is active, and the 'User Login' menu item is highlighted with a red circle and arrow. A 'Login Screen - Enter username and password' dialog box is open, showing fields for 'User Name' and 'Password', and buttons for 'Ok' and 'Quit'. The 'Ok' button is highlighted with a red circle and arrow.

Order ID	Order Date	Order Priority	Order Qty.	Sales	Discount	Sh. Mode	Profit	Unit Price	Shipping Cost	Customer Name	Province	Region	Customer Seg	Product Name	
3	08/04/2022	Low	6	\$259.29	0.04	Delivery Truck	\$213.25	\$38.94	\$35.00	Tom Zandusky	Nunavut	Nunavut	Small Business	Eldon Base for stackable stc	
4	27/03/2024	High	49	\$9,553.87	0.07	Delivery Truck	\$457.81	\$208.16	\$68.02	Barry French	Nunavut	Nunavut	Consumer	1.7 Cubic Foot Compact 'Ci	
5	27/03/2024	High	27	\$235.27	0.01	Regular Air	\$46.71	\$8.69	\$2.99	Barry French	Nunavut	Nunavut	Consumer	Cardinal Slant-D8 Ring Binc	
6	483	03/01/2023	High	30	\$5,413.31	0.08	Regular Air	\$1,198.97	\$195.99	\$3.99	Clay Rozendal	Nunavut	Nunavut	Corporate	R380
7	515	21/02/2022	Not Specified	19	\$386.65	0.08	Regular Air	\$30.94	\$21.78	\$5.94	Carlos Soltero	Nunavut	Nunavut	Consumer	Holmes HEPA Air Purifier
8	515	21/02/2022	Not Specified	21	\$137.42	0.05	Regular Air	\$4.43	\$6.64	\$4.95	Carlos Soltero	Nunavut	Nunavut	Consumer	G.E. Longer-Life Indoor Rec
9	613	11/12/2022	High	12	\$92.69	0.03	Regular Air	\$24.94	\$7.30	\$7.72	Carl Jackson	Nunavut	Nunavut	Corporate	Angle-D Binders with Lockin
10	613	11/12/2022	High	22	\$962.28	0.09	Regular Air	\$107.70	\$42.76	\$6.22	Carl Jackson	Nunavut	Nunavut	Corporate	SAFCO Mobile Desk Side F
11	643	17/09/2022	High	21	\$2,732.87	0.07	Express Air	\$65.00	\$138.14	\$35.00	Monica Federle	Nunavut	Nunavut	Corporate	SAFCO Commercial Wire S
12	678	22/09/2021	Low	44	\$212.11	0.07	Regular Air	\$226.35	\$4.98	\$8.33	Dorothy Badders	Nunavut	Nunavut	Home Office	Xerox 198
13	807	19/05/2022	Medium	45	\$196.85	0.01	Regular Air	\$166.85	4.28	\$6.18	Neola Schneider	Nunavut	Nunavut	Home Office	Xerox 1980
14	807	19/05/2022	Medium	32	\$123.34	0.04	Regular Air					Nunavut	Nunavut	Home Office	Advantus Map Pennant Flag
15	868	03/12/2023	Not Specified	32	\$702.90	0	Regular Air					Nunavut	Nunavut	Home Office	Holmes HEPA Air Purifier
16	868	03/12/2023	Not Specified	31	\$1,431.49	0.04	Regular Air					Nunavut	Nunavut	Home Office	DS/HD IBM Formatted Disk
17	933	28/01/2024	Not Specified	15	\$50.61	0.02	Regular Air					Nunavut	Nunavut	Small Business	Wilson Jones 1" Hanging Di
18	995	23/11/2022	Medium	46	\$1,762.93	0.03	Regular Air					Nunavut	Nunavut	Home Office	Ultra Commercial Grade Du
19	998	21/05/2021	Not Specified	16	\$235.60	0.07	Regular Air					Nunavut	Nunavut	Small Business	#10-4 1/8" x 9 1/2" Premium
20	1154	10/08/2023	Critical	44	\$4,291.62	0.04	Delivery Truck					Nunavut	Nunavut	Home Office	Hon 4-Sheet Metal Bookcas
21	1154	10/08/2023	Critical	11	\$657.80	0.25	Regular Air					Nunavut	Nunavut	Home Office	Lesro Sheffield Collection C
22	1344	10/10/2023	Low	15	\$935.72	0.06	Regular Air					Nunavut	Nunavut	Corporate	g520
23	1344	10/10/2023	Low	18	\$2,788.73	0.01	Regular Air					Nunavut	Nunavut	Corporate	LX 788
24	1412	05/09/2021	Not Specified	13	\$43.67	0.1	Express Air					Nunavut	Nunavut	Consumer	Avery 52
25	1412	05/09/2021	Not Specified	21	\$94.66	0.05	Regular Air					Nunavut	Nunavut	Consumer	Plymouth Boxed Rubber Bar
26	1539	02/09/2022	Low	33	\$458.08	0.1	Regular Air					Nunavut	Nunavut	Corporate	GBC Pre-Punched Binding I
27	1539	02/09/2022	Low	38	\$181.46	0.05	Regular Air	\$144.55	\$4.89	\$4.93	Carl Ludwig	Nunavut	Nunavut	Corporate	Maxell 3.5" DS/HD IBM-For
28	1540	29/01/2024	High	30	\$79.32	0.09	Regular Air	\$5.76	\$2.88	\$0.70	Don Miller	Nunavut	Nunavut	Home Office	Newell 335
29	1702	30/10/2022	High	23	\$62.33	0.06	Regular Air	\$4.90	\$2.84	\$0.93	Annie Cyprus	Nunavut	Nunavut	Home Office	SANFORD Liquid Accent. T
30	1761	18/06/2022	High	25	\$11,186.25	0.01	Delivery Truck	\$547.61	\$449.99	\$49.00	Carl Ludwig	Nunavut	Nunavut	Corporate	Canon PC940 Copier
31	1792	04/05/2022	Low	28	\$366.85	0.04	Regular Air	\$5.45	\$13.48	\$4.51	Carlos Soltero	Nunavut	Nunavut	Consumer	Tenex Personal Project File
32	2275	16/04/2024	Not Specified	49	\$275.26	0.08	Regular Air	\$41.67	\$6.08	\$1.17	Grant Carroll	Nunavut	Nunavut	Small Business	Col-Erase® Pencils with Era
33	2277	27/06/2022	Not Specified	10	\$63.58	0.01	Regular Air	\$46.03	\$5.98	\$4.38	Don Miller	Nunavut	Nunavut	Home Office	Imation 3.5" DS/HD IBM For
34	2277	27/06/2022	Not Specified	21	\$829.13	0.06	Regular Air	\$33.67	\$40.99	\$19.99	Don Miller	Nunavut	Nunavut	Home Office	White Dual Perf Computer P
35	2532	05/04/2023	High	39	\$277.03	0.03	Regular Air	\$140.01	\$7.31	\$0.49	Alan Barnes	Nunavut	Nunavut	Corporate	Self-Adhesive Address Lab
36	2532	05/04/2023	High	24	\$501.22	0.01	Regular Air	\$78.96	\$20.99	\$2.50	Alan Barnes	Nunavut	Nunavut	Corporate	Accessory37
37	12631	19/03/2022	Low	27	\$1,019.44	0.08	Regular Air	\$252.66	\$40.96	\$1.99	Jack Garza	Nunavut	Nunavut	Corporate	Fuji 5.2GB DVD-RAM

Depending on the access levels assigned to a user, certain application menu items will be either greyed out or invisible.



Note that the restrictions discussed in this section such as Edit, Add and delete will only apply insofar as using Auto ExcelForms for your data input. The end user can still inadvertently edit or delete data directly on the worksheet unless you also use normal Excel worksheet protection. (*Review-> Protect Sheet* on Excel ribbon).

## 14 Auto ExcelForms – Professional Version

### 14.1 Value Proposition

Whether you're a busy Excel user looking to save time, or a professional developer building solutions for others, Auto ExcelForms Pro gives you the tools to work smarter and deliver faster.

In just a click or two, you can generate fully-functional Designer Forms—customizable, distributable userforms with built-in Auto ExcelForms functionality. Modify them as much as you like, and freely share them with colleagues or clients. Save time. Earn income.

With the standard Auto ExcelForms add-in, you can instantly launch AutoForms from any data table and customize them on the fly with just a few clicks. However, if someone else wants to use that same functionality, they would need their own copy of Auto ExcelForms installed. That's not a big hurdle—after all, the app is very affordable (starting at free!).

But if you want to create forms for others, or if you need even deeper customization than the standard version allows, then **Auto ExcelForms Pro** is for you.

Whether you're a developer or someone with basic Excel experience, the Pro version unlocks powerful options. The only prerequisite is that you're comfortable opening the Visual Basic Editor and changing a couple of settings.

#### What Pro Unlocks

Auto ExcelForms Pro lets you convert any automatically generated TableForm into a permanent, editable form embedded in your workbook. Once created, it behaves like a native form that you can fully customize—just like one you'd build from scratch in the editor.

You can then share that workbook—with working forms included—without requiring the recipient to install Auto ExcelForms.

The embedded forms retain nearly all the rich features of Auto ExcelForms Standard:

- Browse/Find window
- Report Generator
- Filter feedback bars
- Theme customization
- Navigation synced to Excel filters
- View/navigate/lookup related tables
- Referential integrity
- ...and more.

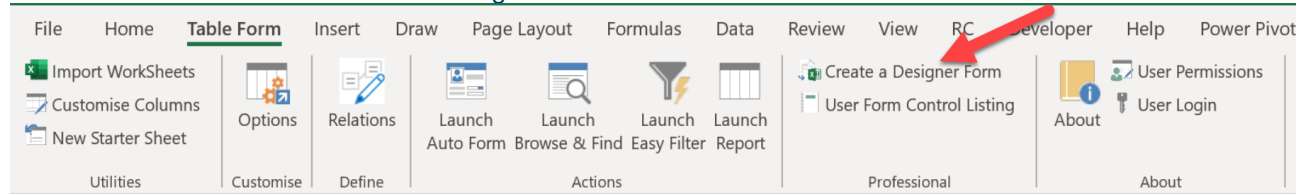
If you prefer, you can skip the built-in code and write your own—either way, you've saved hours of design work.



All of this functionality is available within a click or two.

The pro version adds a menu item to the Excel ribbon that is not included in the standard version.

### Auto ExcelForms Pro Version adds 'Designer Forms



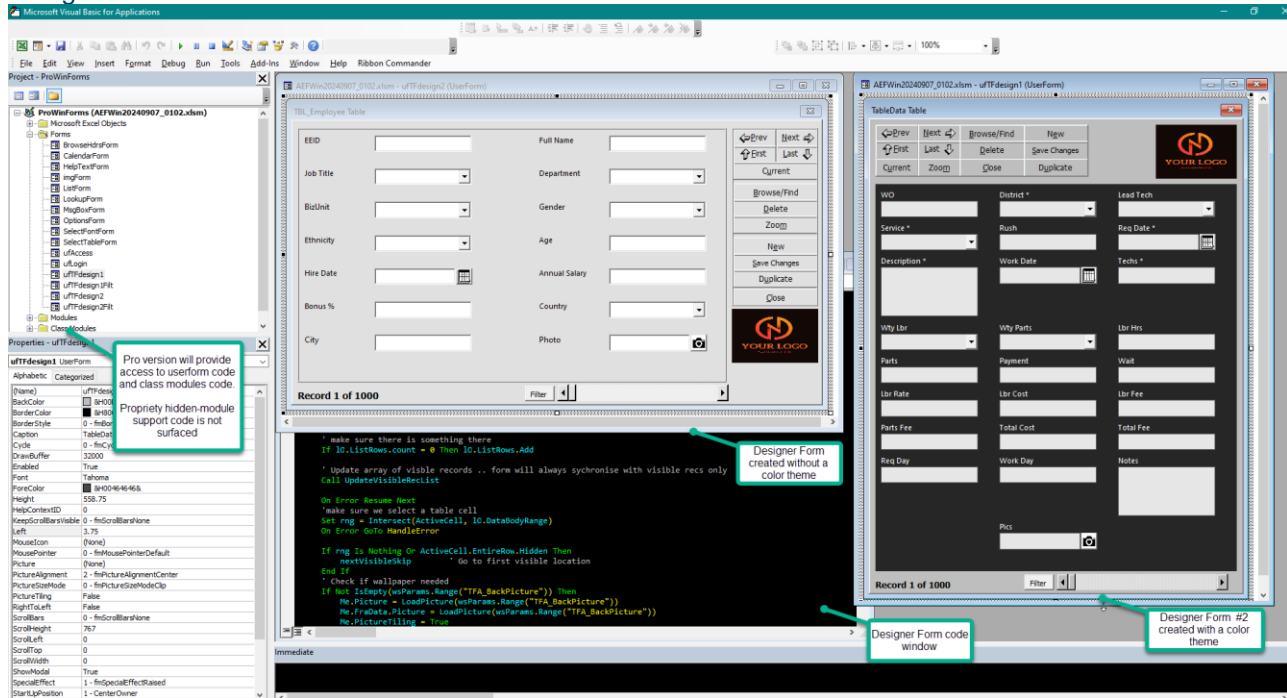
## 14.2 Features

Auto ExcelForms Professional provides extremely powerful functionality, especially for slightly more experienced users of Excel.

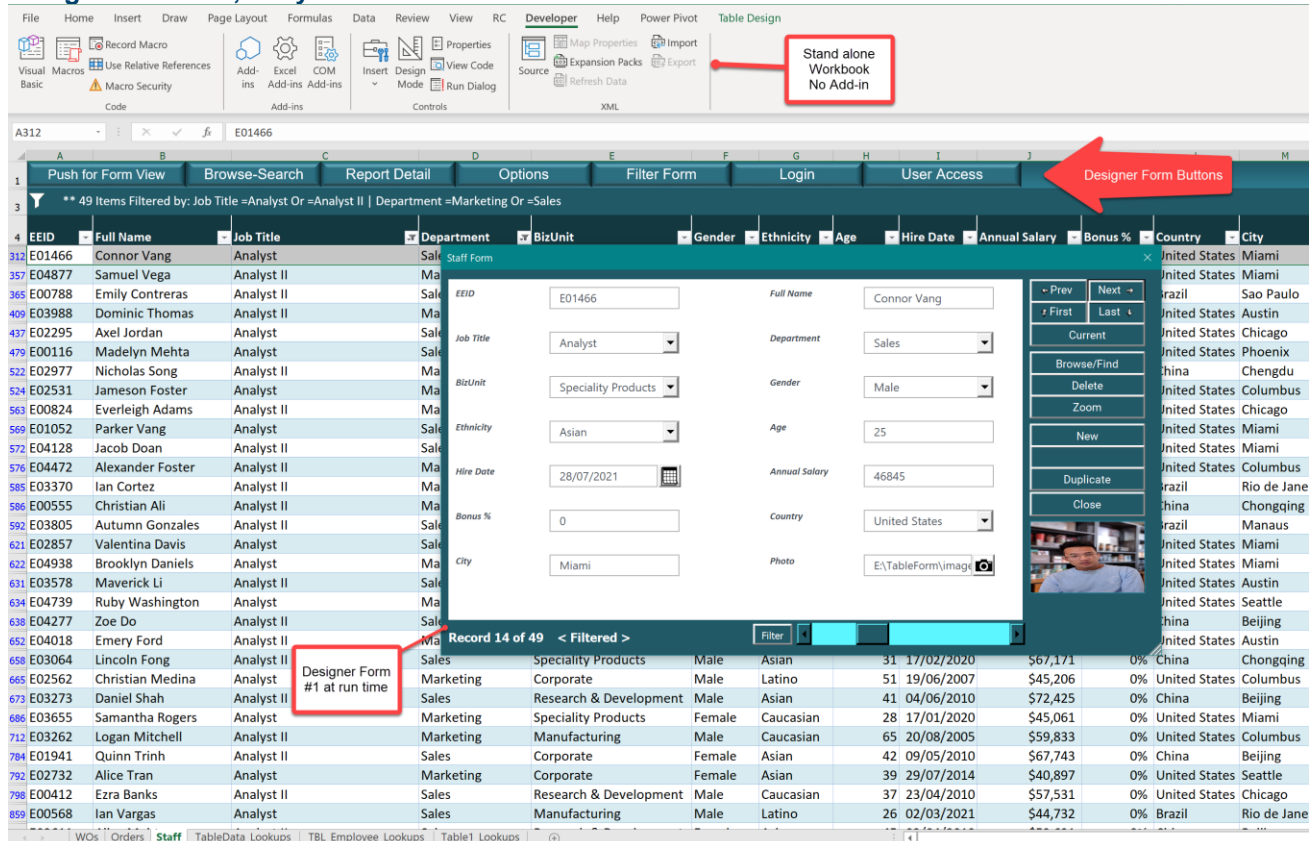
- Automatically Create modifiable userforms in seconds, not hours, days or weeks. These reside in the Visual Basic Editor. *In Auto ExcelForms these are called **Designer Forms***
- Text boxes and Combo boxes and option buttons can be added to a Designer Form and these will include all the Navigation, Add, Edit and other data form functionality. This will happen without needing any additional code whatsoever.
- Auto ExcelForms functionality is included in Distributable workbooks with Designer forms. This includes the Browse/Finder and Reporter, form navigation, Add/Edit/Delete etc.
- **Options Window for end-users** is included in the distributable workbooks allowing users to select most of the options available for an AutoForm (You can choose to limit this if you wish).
- As many Designer forms as you require can be included in a Distributable workbook
- Modify/Add code to the user form as you wish
- **Controls List Report for Userforms** – List all controls on the form with their properties, such as height, length, position, fonts etc.
- Each Worksheet with an associated Designer Form has its own menu buttons. *(Of course, You can do your own and assign the appropriate macros)*

## 14.3 Screen shot samples

### Designer Forms in the Visual Basic Editor



### Designer Form #1, Fully functional in Workbook without the Auto ExcelForms Add-in



## Designer Form #2, Fully functional in Workbook without the Auto ExcelForms Add-in

The screenshot shows the Microsoft Excel environment with the 'Developer' tab active. The 'Formulas' group on the ribbon includes buttons for 'Add-ins', 'Excel Add-ins', 'COM Add-ins', 'Insert', 'Design Mode', 'View Code', 'Run Dialog', 'Map Properties', 'Import', 'Export', and 'Refresh Data'. The main worksheet displays a data table with the following columns: WO, District, Lead Tech, Service, Rush, Req Date, Description, Techs, Wty Lbr, Wty Parts, Lbr Hrs, Parts Cost, Payment, Wait, Lbr Rate, Lbr Cost, Lbr Fee, Parts Fee, and Total Cost. A red box highlights the text 'Designer Form #2 at run time' in the 'Description' column. A 'Browse or Search Data Table: TableData' dialog box is open, showing a search for 'WO' and a list of records. The dialog box includes a 'Search By' dropdown set to 'WO' and a 'Search For' field. The list of records shows various work orders (WO) with their respective dates, descriptions, districts, services, and total costs. The status bar at the bottom indicates 'Record 4 of 1002' and 'Average: 8143.916667 Count: 22 Sum: 97727'.

## 14.4 Pro Version Designer Pre-requisite

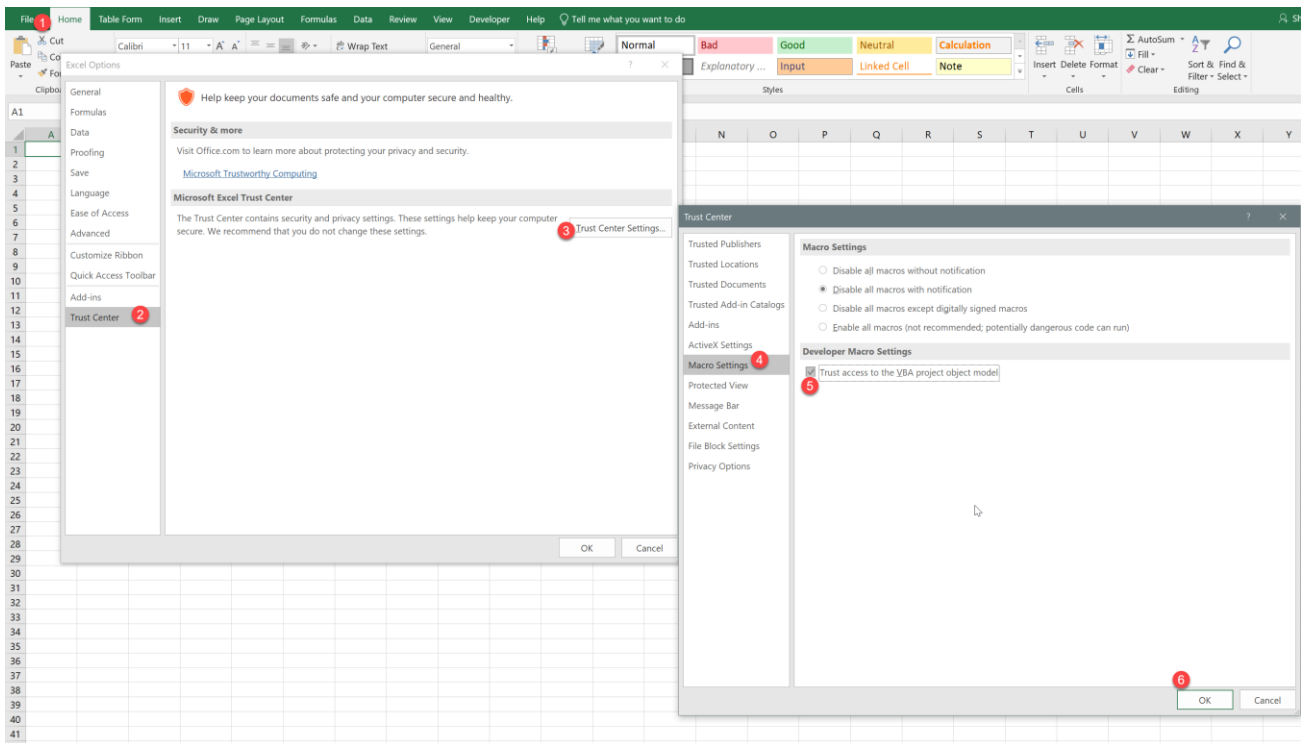
The only requirement to be up and running with Auto ExcelForms Pro functionality is that you enable an additional Excel setting. In particular you must:

***Enable trust access to the VBA project object model***

### 14.4.1 Enable trust access to the VBA project object model

With Microsoft Excel open do the following:

1. Click File and then Options.
2. In the navigation pane, select Trust Center.
3. Click Trust Center Settings....
4. In the navigation pane, select Macro Settings.
5. Ensure that Trust access to the VBA project object model is checked.
6. Click OK.



That's it. You are all set to build designer forms.!!

N.B. This setting is only required for you to build workbooks with Designer forms. The end users for these workbooks do not need to have these settings. Of course, they should have macros enabled, since these will be macro-enabled workbooks.

## 14.5 Creating the Designer TableForm

Creating the designer table-form takes just a couple of clicks. You should keep in mind though, that at the end of the process a form will actually now be laid out and fully defined in the Visual Basic Editor. This form should be as close as possible to how you would like it, so that you'd have minimal modifications if any, to do before using it or distributing it to others. So here are some suggested tips to get going.

### 14.5.1 Suggested Tips

Select the worksheet with the data table for the form, run an AutoForm first and confirm it is how you would like your form and table to look and work together. For example, select Options on the ribbon menu and setup the following things before generating the designer form ***if applicable***:

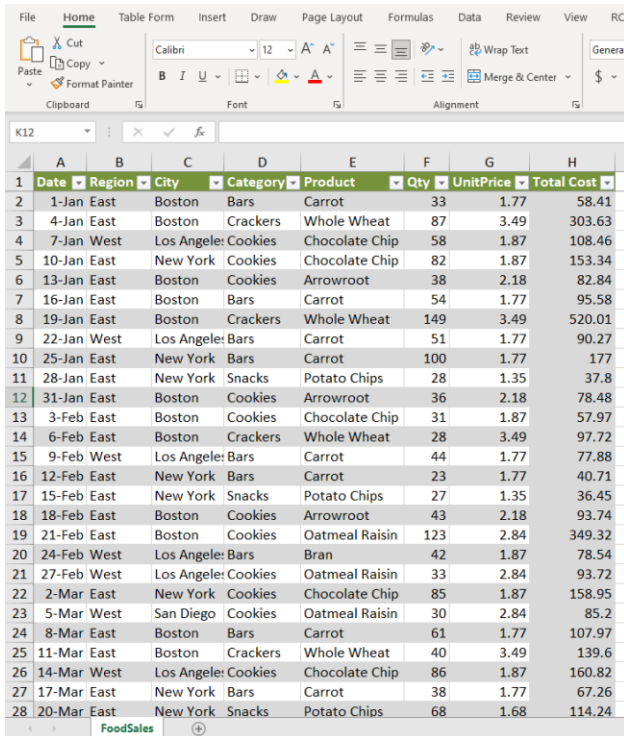
- Command Buttons on side or not
- Labels above Text Boxes or not (results in 3 column or 2 column layouts)
- Primary Key and AutoIncrement key
- Use the *Conditional Column specs* option on page 3 of the Options form to do the following if applicable
  - Multiline boxes (M+ Only necessary if the AutoForm generator didn't automatically detect one and you need one)
  - Image Boxes and date boxes (I+ D+ Only necessary if they weren't automatically detected)
  - Validation tables if needed (the V+ option automates this) for combo boxes and data validation
- Allow checkbox controls or not (Page 2 on Options form)

Click on Launch AutoForm and if satisfied, go ahead and create the Designer form. Of course, you can restart the process and rebuild the designer form again, but you will waste less time getting it right the first time!

## 14.5.2 Example setup

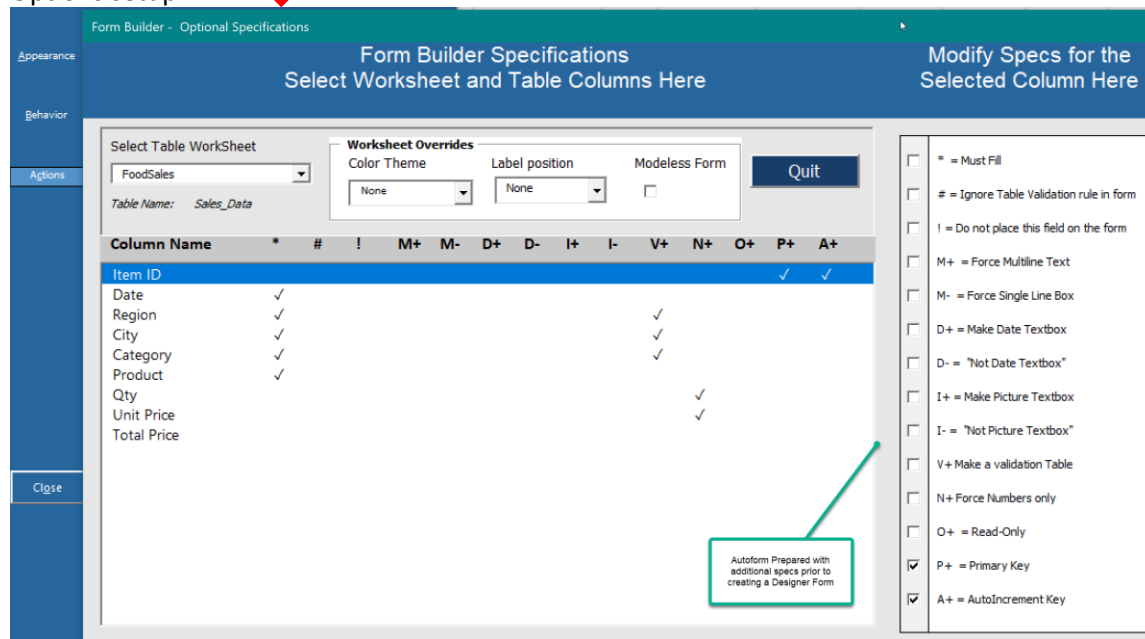
The following is an example of a simple, raw file with a table. We can select the sheet with the table, immediately click the ribbon button to create a designer form and it will work just fine, but we can end up with a better initial result if we do just a little preparation:

### Raw Table



	A	B	C	D	E	F	G	H
1	Date	Region	City	Category	Product	Qty	UnitPrice	Total Cost
2	1-Jan	East	Boston	Bars	Carrot	33	1.77	58.41
3	4-Jan	East	Boston	Crackers	Whole Wheat	87	3.49	303.63
4	7-Jan	West	Los Angeles	Cookies	Chocolate Chip	58	1.87	108.46
5	10-Jan	East	New York	Cookies	Chocolate Chip	82	1.87	153.34
6	13-Jan	East	Boston	Cookies	Arrowroot	38	2.18	82.84
7	16-Jan	East	Boston	Bars	Carrot	54	1.77	95.58
8	19-Jan	East	Boston	Crackers	Whole Wheat	149	3.49	520.01
9	22-Jan	West	Los Angeles	Bars	Carrot	51	1.77	90.27
10	25-Jan	East	New York	Bars	Carrot	100	1.77	177
11	28-Jan	East	New York	Snacks	Potato Chips	28	1.35	37.8
12	31-Jan	East	Boston	Cookies	Arrowroot	36	2.18	78.48
13	3-Feb	East	Boston	Cookies	Chocolate Chip	31	1.87	57.97
14	6-Feb	East	Boston	Crackers	Whole Wheat	28	3.49	97.72
15	9-Feb	West	Los Angeles	Bars	Carrot	44	1.77	77.88
16	12-Feb	East	New York	Bars	Carrot	23	1.77	40.71
17	15-Feb	East	New York	Snacks	Potato Chips	27	1.35	36.45
18	18-Feb	East	Boston	Cookies	Arrowroot	43	2.18	93.74
19	21-Feb	East	Boston	Cookies	Oatmeal Raisin	123	2.84	349.32
20	24-Feb	West	Los Angeles	Bars	Bran	42	1.87	78.54
21	27-Feb	West	Los Angeles	Cookies	Oatmeal Raisin	33	2.84	93.72
22	2-Mar	East	New York	Cookies	Chocolate Chip	85	1.87	158.95
23	5-Mar	West	San Diego	Cookies	Oatmeal Raisin	30	2.84	85.2
24	8-Mar	East	Boston	Bars	Carrot	61	1.77	107.97
25	11-Mar	East	Boston	Crackers	Whole Wheat	40	3.49	139.6
26	14-Mar	West	Los Angeles	Cookies	Chocolate Chip	86	1.87	160.82
27	17-Mar	East	New York	Bars	Carrot	38	1.77	67.26
28	20-Mar	East	New York	Snacks	Potato Chips	68	1.68	114.24

### Options setup



Form Builder - Optional Specifications

Form Builder Specifications  
Select Worksheet and Table Columns Here

Modify Specs for the Selected Column Here

Select Table WorkSheet: FoodSales  
Table Name: Sales\_Data

Worksheet Overrides:  
Color Theme: None  
Label position: None  
Modeless Form: ☐

Quit

Column Name	*	#	!	M+	M-	D+	D-	I+	I-	V+	N+	O+	P+	A+
Item ID														
Date	✓													
Region	✓													
City	✓													
Category	✓													
Product	✓													
Qty														
Unit Price														
Total Price														

Legend:

- \* = Must Fill
- # = Ignore Table Validation rule in form
- ! = Do not place this field on the form
- M+ = Force Multiline Text
- M- = Force Single Line Box
- D+ = Make Date Textbox
- D- = "Not Date Textbox"
- I+ = Make Picture Textbox
- I- = "Not Picture Textbox"
- V+ Make a validation Table
- N+ Force Numbers only
- O+ = Read-Only
- ✓ P+ = Primary Key
- ✓ A+ = AutoIncrement Key

Autoform Prepared with additional specs prior to creating a Designer Form

## Auto ExcelForms



Check Auto Form before generating the “Designer Form”

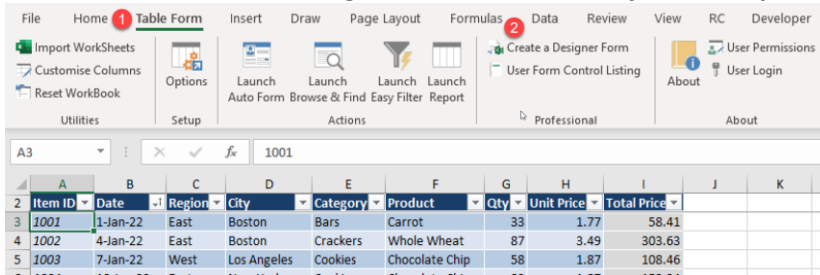
The screenshot shows the Excel ribbon with the 'Table Form' tab selected. The 'FoodSales Form' dialog box is open, displaying a form for 'FoodSales Form'. The form includes fields for Item ID, Date, Region, City, Category, Product, Qty, and Unit Price. The 'Item ID' field is highlighted with a callout stating 'Primary AutoIncrement Key was created'. The 'Region', 'City', and 'Category' fields are dropdown menus, with a callout stating 'Combo Boxes Generated'. The 'Product' field is a text box, and the 'Qty' and 'Unit Price' fields are numeric text boxes. A callout states 'Mandatory Fields Specified' for the 'Region', 'City', 'Category', and 'Product' fields. The 'Total Price' field is calculated as 90.27. The dialog box also shows a 'Record 8 of 244' and a 'Filter' button. The background shows an Excel spreadsheet with columns for Item ID, Date, Region, City, Category, Product, Qty, Unit Price, and Total Price.

Item ID	Date	Region	City	Category	Product	Qty	Unit Price	Total Price
1001	1-Jan-22	West	Boston	Bars	Carrot	33	1.77	58.41
1002	2-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1003	3-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1004	4-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1005	5-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1006	6-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1007	7-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1008	8-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1009	9-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1010	10-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1011	11-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1012	12-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1013	13-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1014	14-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1015	15-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1016	16-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1017	17-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1018	18-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1019	19-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1020	20-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1021	21-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1022	22-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1023	23-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1024	24-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1025	25-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1026	26-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1027	27-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1028	28-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1029	29-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1030	30-Jan-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1031	31-Jan-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1032	1-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1033	2-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1034	3-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1035	4-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1036	5-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1037	6-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1038	7-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1039	8-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1040	9-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1041	10-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1042	11-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1043	12-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1044	13-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1045	14-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1046	15-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1047	16-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1048	17-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1049	18-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1050	19-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1051	20-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1052	21-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1053	22-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1054	23-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1055	24-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1056	25-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1057	26-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1058	27-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1059	28-Feb-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1060	29-Feb-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1061	1-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1062	2-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1063	3-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1064	4-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1065	5-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1066	6-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1067	7-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1068	8-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1069	9-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1070	10-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1071	11-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1072	12-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1073	13-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1074	14-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1075	15-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1076	16-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1077	17-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1078	18-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1079	19-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1080	20-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1081	21-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1082	22-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1083	23-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1084	24-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1085	25-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1086	26-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1087	27-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1088	28-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1089	29-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1090	30-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1091	31-Mar-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1092	1-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1093	2-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1094	3-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1095	4-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1096	5-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1097	6-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1098	7-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1099	8-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1100	9-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1101	10-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1102	11-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1103	12-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1104	13-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1105	14-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1106	15-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1107	16-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1108	17-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1109	18-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1110	19-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1111	20-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1112	21-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1113	22-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1114	23-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1115	24-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1116	25-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1117	26-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1118	27-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1119	28-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1120	29-Apr-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1121	30-Apr-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1122	1-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1123	2-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1124	3-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1125	4-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1126	5-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1127	6-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1128	7-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1129	8-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1130	9-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1131	10-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1132	11-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1133	12-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1134	13-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1135	14-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1136	15-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1137	16-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1138	17-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1139	18-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1140	19-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1141	20-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1142	21-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1143	22-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1144	23-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1145	24-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1146	25-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1147	26-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1148	27-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1149	28-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1150	29-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1151	30-May-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1152	31-May-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1153	1-Jun-22	West	Los Angeles	Bars	Carrot	33	1.77	58.41
1154	2-Jun-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1155	3-Jun-22	West						

### 14.5.3 How to Create the Designer TableForm and the Designer Workbook

Once satisfied with your data table and the AutoForm that it generates you can create a designer form. Simply

1. **click “Table Form “ on the Excel ribbon and then**
2. **click the “Create a Designer Form” Button and follow the prompts.**



You will be prompted to locate a template file which is included with Auto ExcelForms Pro version.

To create workbooks and forms for windows operating system use the template file

*TFProTemplate Win.xlsm*

To create workbooks and forms for Mac operating system use the template file

*TFProTemplate Mac.xlsm*

**Click OK to the first prompt, select the folder with your template and select the appropriate template file (Mac or Windows)**

**That's it! You are now free to click the on-sheet buttons to run forms independently of AutoExcelForms.**

All new “Designer” workbooks will be created in a sub folder from the folder with your template file.

Note: You cannot create designer workbooks and forms without a template file so please secure a backup copy in a safe place.

### 14.5.4 What happens behind the scenes:

Once you click OK to the first prompt, select the template folder and click on the appropriate template file (Mac or Windows) the following will happen:

- Everything in your active workbook including worksheets, existing Forms, classes etc will be copied across to a **“Designer workbook”** that has Auto ExcelForms code. This new workbook file will have a unique name based on the date and time
- Your original source (active) workbook is saved and closed.
- In the new workbook, the active worksheet sheet data table will be designated as a **“Designer sheet”** and assigned a designer codename in the Visual Basic editor: wsTFDesignxx where xx is some number. Menu buttons providing Auto ExcelForms functionality are added to the worksheet.
- A **“Designer Form”** is created in the Visual Basic Editor identical to the Autoform that the table would have generated. The name of the form will be ufTFDesignxx where xx is the same number from the worksheet codename in (c)



## Auto ExcelForms

This normally takes several seconds and a progress bar will display what is happening.

That's it! You are now free to click the on sheet buttons to run the form independently of AutoExcelForms.

Once inside the designer workbook you can create additional forms from any other worksheets with tables within this workbook without needing to do steps (a) and (b). Just select another worksheet and click the "Create a Designer Form" Button once more. Steps (c) and (d) will execute for each new form.



N.B. This new Designer workbook can stand on its own and does NOT need the Auto ExcelForms add-in to function.

## 14.5.5 Designer Form Example

The results for the example from the previous section are illustrated next. The Auto ExcelForms add-in is disabled to illustrate that designer workbooks and forms are totally self-contained and do not require the add-in.

Design Workbook and Table from the current example.

The screenshot shows an Excel spreadsheet with a 'FoodSales' table. The table has the following data:

Item ID	Date	Region	City	Category	Product	Qty	Unit Price	Total Price
1001	1-Jan-22	East	Boston	Bars	Carrot	33	1.77	58.41
1002	14-Mar-22	West	Los Angeles	Cookies	Chocolate Chip	86	1.87	160.82
1003	17-Mar-22	East	New York	Bars	Carrot	38	1.77	67.26
1004	20-Mar-22	East	New York	Snacks	Potato Chips	68	1.68	114.24
1005	23-Mar-22	West	San Diego	Cookies	Chocolate Chip	39	1.87	72.93
1006	26-Mar-22	East	Boston	Bars	Bran	103	1.87	192.61
1007	29-Mar-22	East	Boston	Cookies	Oatmeal Raisin	193	2.84	548.12
1008	1-Apr-22	West	Los Angeles	Bars	Carrot	58	1.77	102.66

The 'FoodSales Form' dialog box is open, showing the following fields:

- Item ID: 1001
- Date: 01/01/2022
- Region: East
- City: Boston
- Category: Bars
- Product: Carrot
- Qty: 33
- Unit Price: 1.77
- Total Price: 58.41

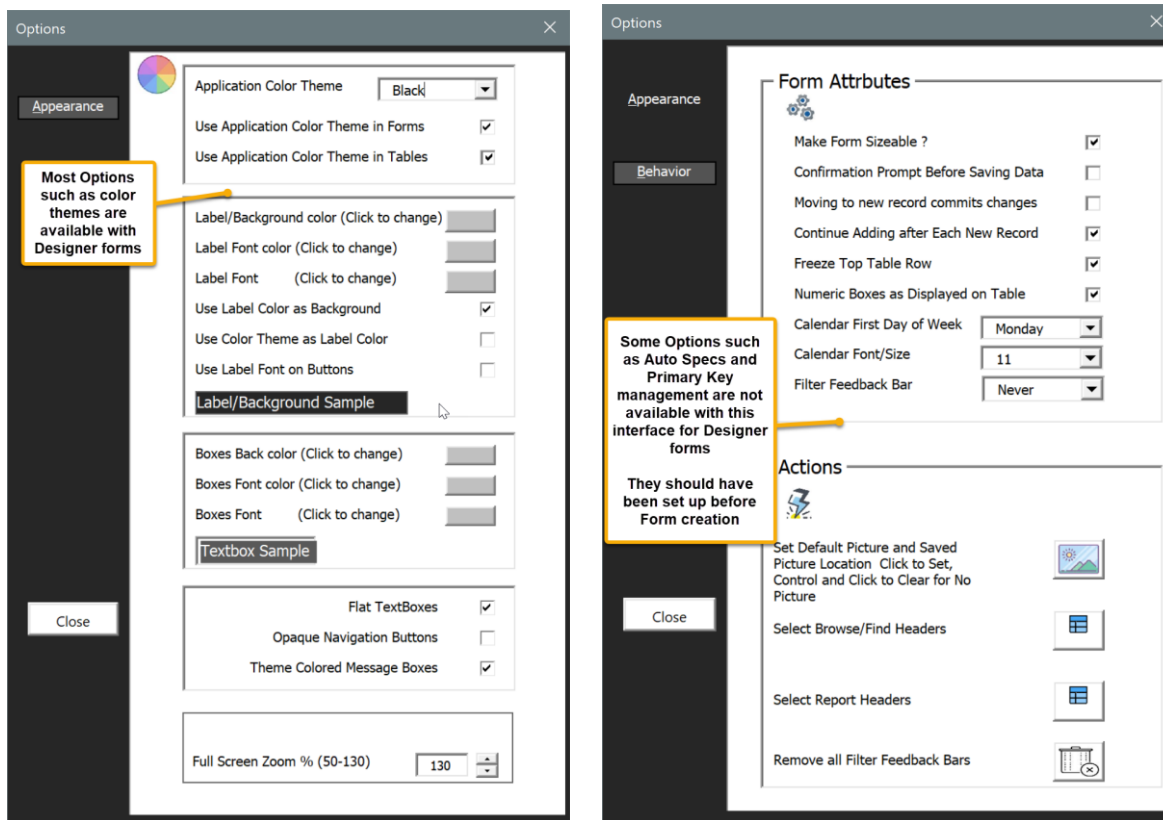
The dialog box also includes navigation buttons (Prev, Next, First, Last, Current, Zoom, Close, Duplicate) and a 'Filter' button at the bottom.

The new Designer form looks exactly like the AutoForm created by Auto ExcelForms but is a totally different animal. It is independent of Auto ExcelForms, is based on an actual user form in the Visual Basic Editor and is fully customizable in the editor.

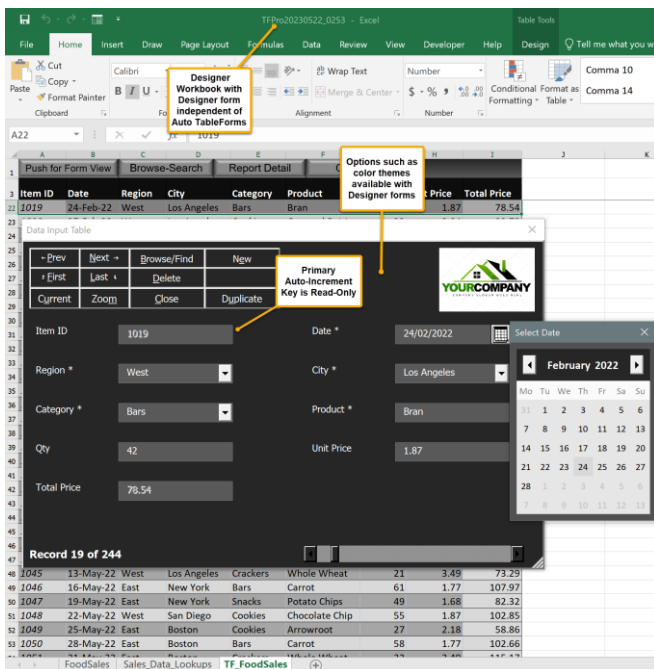
The options form for a designer workbook will allow most, but not all of the Auto ExcelForms options form functionality.

## Auto ExcelForms

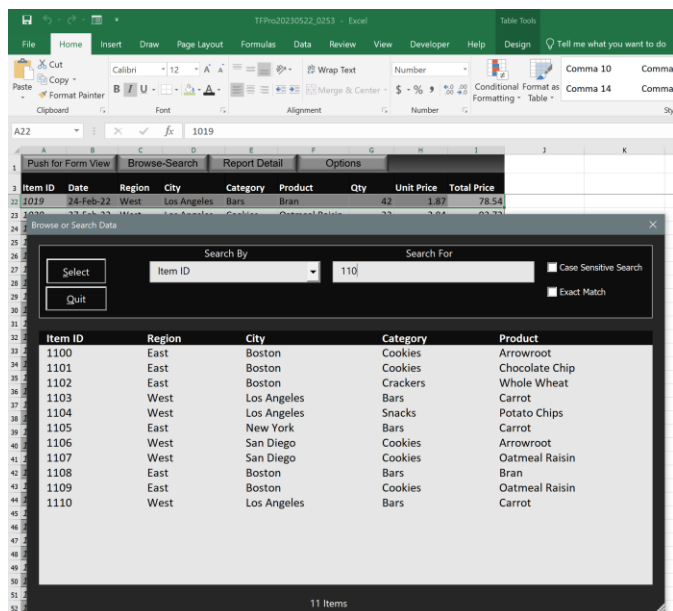
Designer Workbook Options Form, similar to Auto ExcelForms Options Form for Run time control



Designer Form From Example with Dark Theme



Includes Auto ExcelForms Browse/Find Window



## Auto ExcelForms

As mentioned, a designer form can be viewed and modified in the Visual Basic Editor. Its appearance and behavior can be controlled at launch time via options set in the options form. You will notice, in this example the form in the editor already has a color theme. ***If you want to start off with a plain grey user form in the VBE, you should untick the option to “Use application color theme in forms” before generating a designer form.***

### Designer Form for the Example in the VBE

The screenshot displays the Microsoft Visual Basic for Applications editor. The main window shows a designer form titled 'TFPro20230522\_0253.xlsm - uTFDesign1 (UserForm)'. The form is designed to look like a sales data table with a blue header bar containing the 'YOUR COMPANY' logo and navigation buttons: '- Prev', 'Next -', 'Browse/Find', 'New', 'First', 'Last', 'Delete', 'Save Changes', 'Current', 'Zoom', 'Close', and 'Duplicate'. The form body contains several input fields: 'Item ID', 'Date \*', 'Region \*', 'City \*', 'Category \*', 'Product \*', 'Qty', 'Unit Price', and 'Total Price'. A status bar at the bottom of the form indicates 'Record 1 of 1000'. The Properties window on the left shows the 'cboCity' control. The Code window on the right contains VBA code for password protection.

```
Method 2 will try to unprotect all sheets with the code entered in the code box.

Unprotect_BeforeForm()
Dim ws As Worksheet, sPass As String
On Error GoTo HandleError

Set ws = FormSheet

' If setting password in code uncomment this block of code
' *****CODE PASSWORD SETUP*****
'ws.Unprotect Password:="54321"
' SetPassword ("54321") ' will enter it in col 1 above header
'ws.Protect Password:="54321" ' reprotect for subsequent use

If sheet was protected and password was entered in col 1
If TestPasswordProtection Then
sPass = GetPassword
ws.Unprotect Password:=sPass
colSpecProtection = True
' if no password supplied will protect (with password)
ElseIf TestOpenProtection Then
ws.Unprotect ' Same but no password was used
```

## 14.6 Modifying a Designer workbook Form

### 14.6.1 The Designer Workbook Advantage

You can modify an Auto ExcelForms *designer form* just like you would any normal Excel Userform in the Visual Basic Editor. Move around controls, add controls, resize controls etc.

But there is a very important distinction/advantage.

If you add or change columns in the associated data table, you will not have to do any coding whatsoever.

If you add/change columns to your table, you can add/change Text Boxes without coding.

If you add/change columns to your table, you can add/change Combo Boxes without coding.

If you add/change columns to your table, you can even add/change Option Buttons without coding.

In fact, you could even replace the table on the worksheet, remove all the data controls and put in new ones on the form and get them to all work together with no coding whatsoever.

Remember, this section is only applicable if you want to modify forms by hand in the Visual basic editor (VBE) and add new controls, for instance, after modifying a data table. Even then, in most cases it is easier to just modify the table, regenerate a designer form and use that for distribution etc.

The 'Designer Form' in the VBE created by the Auto ExcelForms form generator functions perfectly without any further intervention. However, you can do extensive modifications on your own as you wish.

## 14.6.2 Adding a TextBox or a ComboBox without needing VBA code

Auto ExcelForms has many lines of code working behind the scenes so you don't have to write any! It is remarkably easy to add immediately functional input controls without any code. Simply follow a very simple and intuitive naming convention. You simply need to understand what Auto ExcelForms refers to as a **"cleaned-up name"**

A cleaned-up name in the designer workbook is one where any character other than a number or a letter is replaced with the underscore character \_

Basically, **cleaned-up names** are control names that are acceptable to the VBE editor

### Adding TextBoxes

In the properties window:

Enter the control name using the cleaned-up name of the Data Table header prefixed with txt

Examples:

Data Table	Address	Last Name	Qty	Unit Cost \$
Header				
TextBox Name	txtAddress	txtLast_Name	txtQty	txtUnit_Cost__

### Adding ComboBoxes

In the properties window:

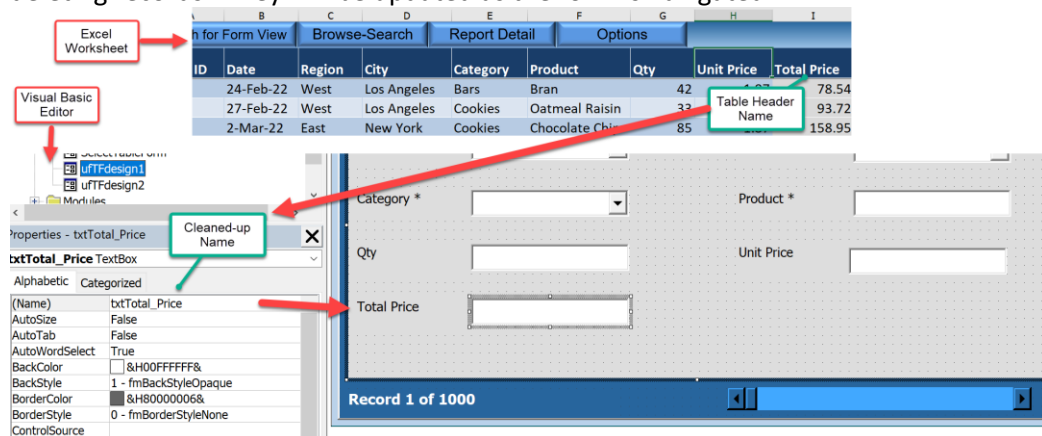
Enter the control name using the cleaned-up name of the Data Table header prefixed with cbo

Examples:

Data Table	Category	Non-Conformance	Dept.	Unit Cost \$
Header		Type		
ComboBox Name	cboCategory	cboNon_Conformance_Type	cboDept_	cboUnit_Cost__

That's it!! Zero code needed!!

These controls will now behave perfectly consistent with what you would expect for adding, editing and deleting records. They will be updated as the form is navigated.



### 14.6.3 Adding Option Buttons to the Userform without needing VBA code

If you look at the many Userform tutorials on YouTube, you will notice that a fair amount of code needs to be added if you want option buttons on the form. There is code to update the buttons from the table and vice versa. The more buttons on the form there are on the form, the more code needs to be written. With Auto ExcelForms designer workbooks, option buttons are much easier. Just a little bit more work than text boxes and combo boxes.

#### Adding Option Buttons

On the Userform in the Editor:

Add a frame to hold and group the buttons (flat style, border style “none” if you don’t want it to be seen)

Add as many buttons as you would like inside the frame

In the properties window:

Enter the control name for the Frame using the cleaned-up name of the Table header prefixed with fra (e.g. fraMarital\_Status for “Marital Status”)

For each option button:

Make the caption property the same as the option to be checked/updated (e.g. “Single”, “Married” )

Make the Name property the cleaned-up name of the caption property preceded by opt (e.g. optSingle)

Example:

Data Table Header      Branch Location

Buttons Frame

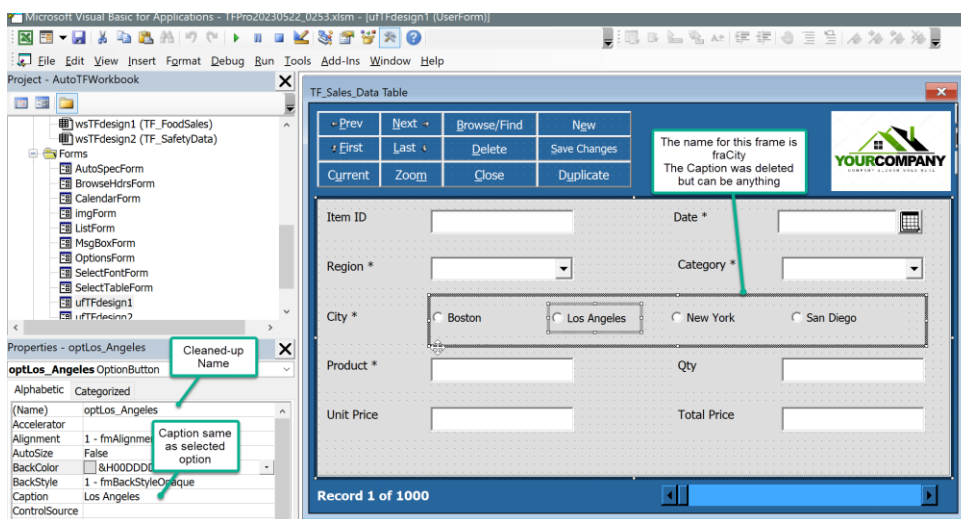
Name      FraBranch\_Location

Table Data Choice	New York	Tokyo	Buenos Aires
-------------------	----------	-------	--------------

Option Button Caption	New York	Tokyo	Buenos Aires
-----------------------	----------	-------	--------------

Option Button Name	optNew_York	optTokyo	optBuenos_Aires
--------------------	-------------	----------	-----------------

Using our previous example, the City Combo Box was easily replaced with Option Buttons. Requiring no VBA coding:



## Results after adding Option Buttons

Designer Form from example with option buttons added to replace City Combo Box

Excel spreadsheet showing the Designer Form interface overlaid on a data table. The form is titled "Data Input Table" and contains various input fields and buttons.

**Excel Spreadsheet:**

- Formula bar: A12, 1009
- Row 1: Push for Form View, Browse-Search, Report Detail, Options

**Form Interface:**

**Buttons:** Prev, Next, Browse/Find, New, First, Last, Delete, Current, Zoom, Close, Duplicate.

**Form Fields:**

- Item ID: 1009
- Date \*: 25/01/2022
- Region \*: East
- Category \*: Bars
- City \*: Boston, Los Angeles, New York, San Diego (Radio buttons)
- Product \*: Carrot
- Qty: 100
- Unit Price: 1.77
- Total Price: 177

**Annotations:**

- A green box highlights the City field with the text: "City Combo Box from Example replaced with Option Buttons".
- A green arrow points from this box to the "Los Angeles" radio button.

**Footer:** Record 9 of 244



## 14.7 User Form Control listing

This button on the Auto ExcelForms ribbon (pro version) serves as a convenience to create a tabular list of all the controls on the designer form in the Visual Basic Editor associated with the selected worksheet. You can do this immediately after a form was generated or any time after.

The screenshot shows the Auto ExcelForms ribbon with the 'User Form Designer Form Control Listing' button highlighted. A red arrow points from this button to the 'Data Form Spec for Userform - uTFDesign1 for Worksheet1\_Worksheets' table. A green callout box labeled 'Sample Userform Controls Listing' points to the table.

Name	Control	Parent Name	Background Color	BackStyle	BorderStyle	Cancel	Caption	Accelerator	Enabled	Font Family	Font Size	Height	Left	Top	Width	Tag	specialEffect	TabIndex	ControlTipText
chkWhyLibr	CheckBox	FraData	16777215	1			Yes		TRUE	Tahoma	9.00	18.3500004	138	166.5	34.1500015		Yes/No	2	21
chkWhyParts	CheckBox	FraData	16777215	1			Yes		TRUE	Tahoma	9.00	18.3500004	270	166.5	34.1500015		Yes/No	2	23
cboDistrict	ComboBox	FraData	16777215	1	0				TRUE	Tahoma	9.00	18.2999992	270	18.5	108	*Lkup_District	2	5	
cboLead_Tech	ComboBox	FraData	16777215	1	0				TRUE	Tahoma	9.00	18.2999992	6	55.5	108	listTechs	2	7	
cboPayment	ComboBox	FraData	16777215	1	0				TRUE	Tahoma	9.00	18.2999992	270	203.5	108	Lkup_Payment	2	29	
cboService	ComboBox	FraData	16777215	1	0				TRUE	Tahoma	9.00	18.2999992	138	55.5	108	*listServices	2	9	
cmdBack	CommandButton	FraButtons	14474460	0		FALSE	Prev	P	TRUE	Tahoma	9.00	20	0	0	48			0	Go to previous visit
cmdBottom	CommandButton	FraButtons	14474460	0		FALSE	Last	L	TRUE	Tahoma	9.00	20	47	18	48			3	Go to last visible
cmdBrowse	CommandButton	FraButtons	14474460	0		FALSE	Browse/Find	B	TRUE	Tahoma	9.00	20	94	0	72			4	Quickly Browse
cmdClose	CommandButton	FraButtons	14474460	0		TRUE	Close	C	TRUE	Tahoma	9.00	20	94	37.5	72			8	Close This
cmdCurrent	CommandButton	FraButtons	14474460	0		FALSE	Current	U	TRUE	Tahoma	9.00	20	0	37.5	48			6	Attempt to Go to a date
cmdDelete	CommandButton	FraButtons	14474460	0		FALSE	Delete	D	TRUE	Tahoma	9.00	20	94	18	72			5	Delete the record
cmdDup	CommandButton	FraButtons	14474460	0		FALSE	Duplicate	U	TRUE	Tahoma	9.00	20	165	37.5	72			11	Create a copy of
cmdForward	CommandButton	FraButtons	14474460	0		FALSE	Next	N	TRUE	Tahoma	9.00	20	47	0	48			1	Go to next visible
cmdNew	CommandButton	FraButtons	14474460	0		FALSE	New	E	TRUE	Tahoma	9.00	20	165	0	72			9	Add a new record and is
cmdPdf	CommandButton	uTFDesign1	14737632	1		FALSE	PDF Input	N	TRUE	Tahoma	8.25	18	486	36	48			1	
cmdSave	CommandButton	FraButtons	14474460	0		FALSE		S	FALSE	Tahoma	8.10	20	165	18	72			10	Save this Data Record
cmdTop	CommandButton	FraButtons	14474460	0		FALSE	First	F	TRUE	Tahoma	9.00	20	0	18	48			2	Go to the first visit
cmdZoom	CommandButton	FraButtons	14474460	0		FALSE	Zoom	m	TRUE	Tahoma	9.00	20	47	37.5	48			7	Zoom form F
FraButtons	Frame	uTFDesign1	6962456		0				TRUE	Tahoma		59	6	6	239		0	2	