

# Knowtifier

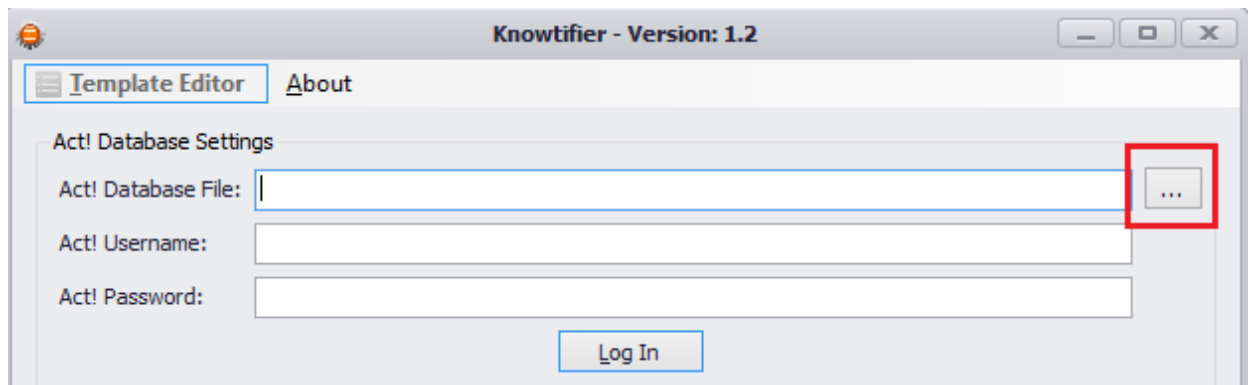
## How do i set up the Knowtifier?

In this article, we will briely go over setting up the Knowtifier to send a basic birthday email to Contacts in your Act! database. More advanced notices can easily be set up using the concepts described below.

Before continuing, please ensure you are running Knowtifier while being logged in as a Windows administrator, and have the appropriate read/write access to your Act! database.

### Installation

1. Install Knowtifier by running the Knowtifier installer and following the on-screen prompts. If you are upgrading Knowtifier from an older version, you will be prompted to stop the Knowtifier service, in which case, click Yes to continue installation and then manually start the service.
2. After the installation is complete, start up Knowtifier and enter your license key if needed. On the main Knowtifier screen, click on the small ellipsis button to browse for your Act! database.



3. If your Act! database is hosted on your computer, navigate to your Act! database's PAD file and then click open.  
**Note:** If your database is hosted on a different machine (e.g. a server), and you are accessing it over the network, please contact your Act! administrator. Your administrator will be able to assist you in determining the correct location of your database.
4. Once you have selected the database, type in your Act! username and password and click **Log In**.
5. After logging in, you will need to install and start the Knowtifier service. In addition to this, you will need to enter your email credentials so that Knowtifier can send emails on your behalf. The email address entered is what the end user will see when they receive an email from you.
6. Click on the **Email Options** button on the main screen of the Knowtifier.
7. Enter your email credentials and server settings in the fields displayed. These settings are different for each email provider. Please contact your email administrator for the correct email server settings.
8. In the **Service Settings** section, enter the **Start Time** of your choosing. Knowtifier will run once a day at the time specified and process all notices

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sequentially.

9. Finally, click on the **Install** button to install the service, and click on the **Start** button to start the knowtifier service. Ensure the **Service Status** displays "Running".
10. Click **OK** to close the Email Options window and press **Apply** to save your settings.

The screenshot shows the 'Email Options' dialog box. It is divided into three main sections:

- Email Account Settings:** Includes fields for Email Address (youremail@domain.com), Email Username (youremail@domain.com), Email Password (masked with asterisks), and SMTP Server (mail.domain.com). There are 'Test Connection' and 'Autodetect' buttons. The SMTP Port is set to 25.
- Service Settings:** Includes a 'Start Time' dropdown menu set to 06:00 PM.
- Service Status:** Shows the service status as 'Running'. There are buttons for 'Start', 'Stop', 'Restart', 'Refresh', 'Install', and 'Uninstall'.

At the bottom of the dialog are 'OK', 'Close', and 'Cancel' buttons.

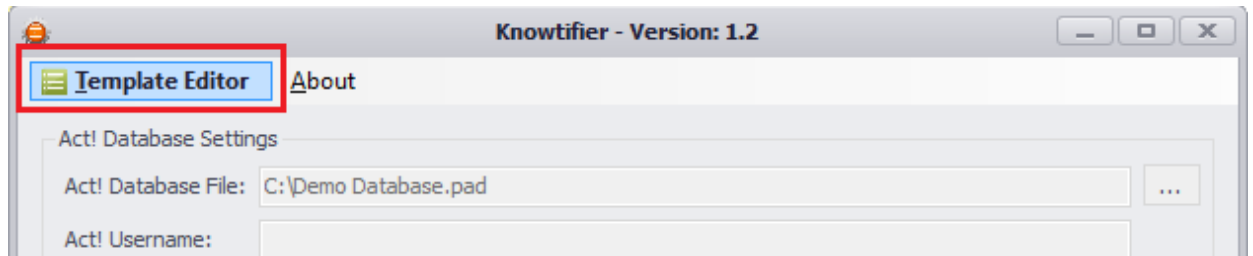
## Notice Configuration

1. Now that you are logged in, you must create a template which will be used to send out the emails to your Contacts. For this example, we will create a birthday reminder email notice.

**Note:** If you have installed Knowtifier on a machine that is running a Remote Database, please ensure you are logged in to Act! prior to making any changes to templates. Failure to do so will result in changes not syncing properly to the server.

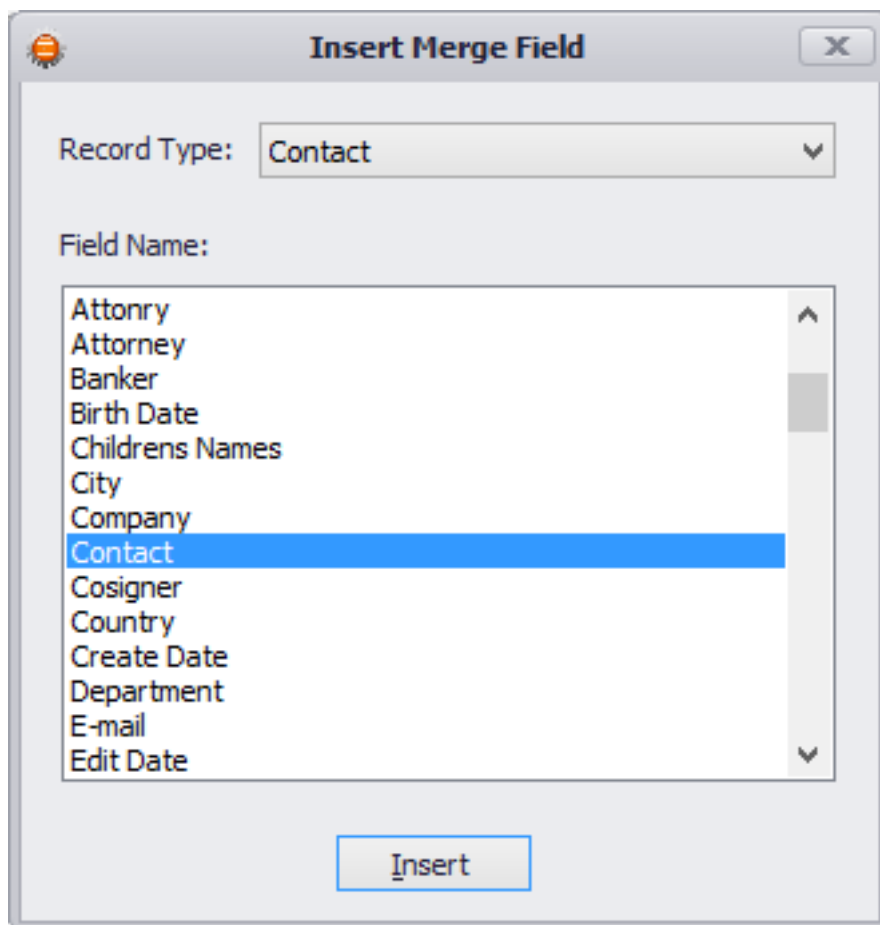
2. Click on the **Template Editor** button to start the editor.

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3. In the main Mail Merge window, enter the message you would like to send to your client. To enter a placeholder for items such as the Contact's name, navigate to the **Insert Merge Field** window, click on the **Record Type** dropdown and select **Contact**. Finally, select a field labelled **Contact** and click the **Insert** button. This will enter a placeholder in your document for the Contact's name and this placeholder will be replaced by the actual Contact's names when the notice runs. Similarly, if you are setting up a notice that uses custom tables, or opportunities, select the respective record type from the dropdown menu, and this will show you a list of all fields available for that record type.

If you accidentally close the "Insert Merge Field" window, you can re-open it by clicking the "Insert Merge Field" button on the **Home** tab of the editor.

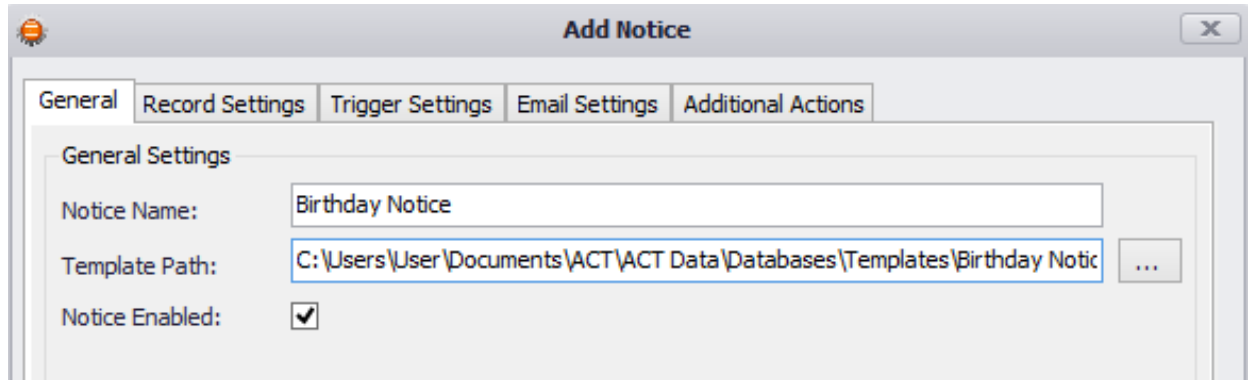


4. Once you are satisfied with the template, click **File > Save** and give the

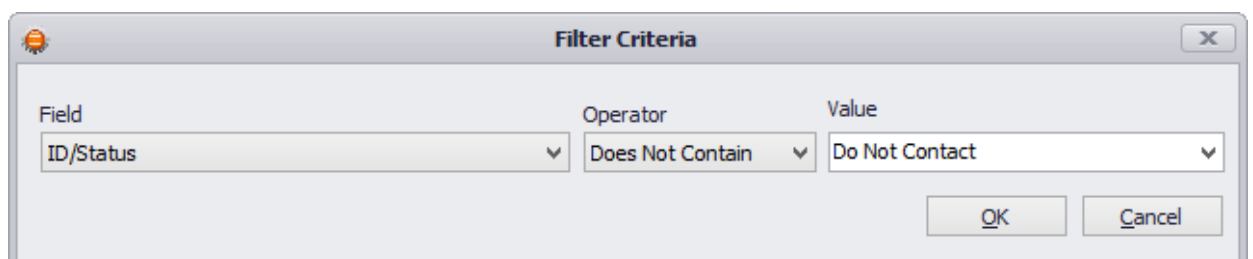
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notice a meaningful name, such as "Birthday notice". Close the template editor after the changes are saved.

5. From the main Knowtifier screen, click on the **Add** button.
6. On the **General** tab, type in a meaningful name for the notice, such as "Birthday Reminder".
7. Click on the ellipsis button to browse for the template file, and select the birthday notice template you created earlier.
8. Click on the **Notice Enabled** checkbox to enable this notice.



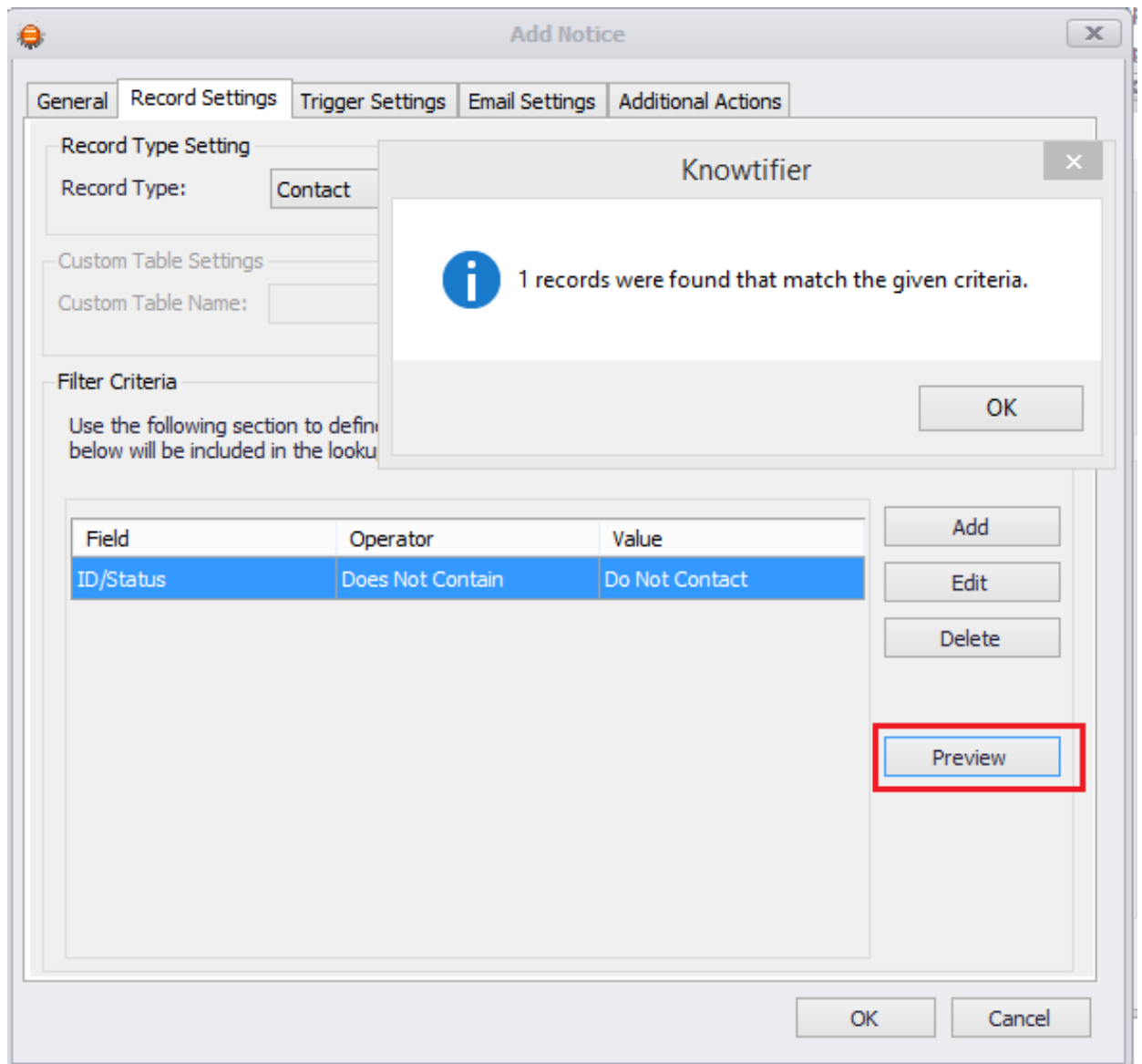
9. On the record settings tab, select the **Record Type** you are working with. In this case, we will select Contact. If you are working with a Custom table, select Custom table from the dropdown which will enable the **Custom Table Name** field which will allow you to select the appropriate custom table.
10. In the **Filter Criteria** section, you can define filters which will help you exclude any contacts from your database that do not match certain predefined conditions. In our example, we will assume that you record the contact preferences under the **ID/Status** field. If this field contains the word "Do Not Contact", then this Contact should not be sent an email. To add this condition, click on the **Add** button and select the field and value similar to what is shown below. These filters will be different depending on how the database is used so please take extra caution in defining these filters. Failure to properly filter your database will result in too many, or too little contacts receiving your communications.



11. You can define as many filters as you like. If you define more than 1 filter, only the Contacts that pass **all** filters will be included in your email blast. Once you are happy with the filter, you can quickly verify the results by clicking the **Preview** button. In our demo database, we only have 1 Contact

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that matches this filter.

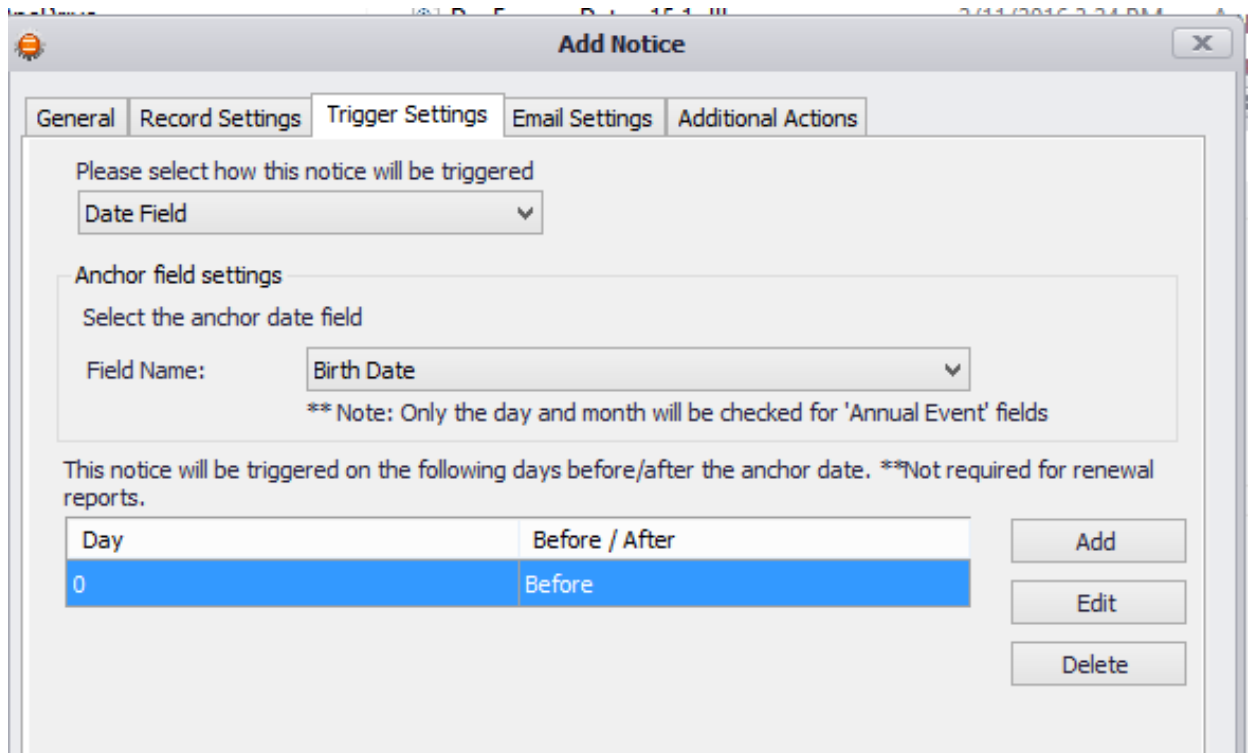


12. Click on the **Trigger Settings** tab, and select **Date Field** from the dropdown menu.
13. From the **Field Name** dropdown menu, select the "Birth Date" field.
14. Next, you will define how often the Contact will receive an email. Since this is a birthday reminder, it will be sufficient to send an email on their birthday. For other notices, such as Renewal notices, you can send an email 30 days before renewal and repeat every week.
15. Click on the **Add** button, and enter **0** in the **Days** field, and press OK. This trigger will now be activated when the "Birth Date" field's value is the same as the current date.

**Important Note:** If a field type in Act! is set to "Annual Event", then only the month and day parts of the field will be compared. This means that if the Birth Date field's value is 1/1/1980, and today's date is 1/1/2016, the notice will be triggered because the month and day parts match. For regular date fields, the year part must also match. For example, if you record the expiry date of a subscription plan, make sure the field type is set to "Date" and not "Annual Event" otherwise the email notice will be triggered every year

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instead of trigger on the expiry date.

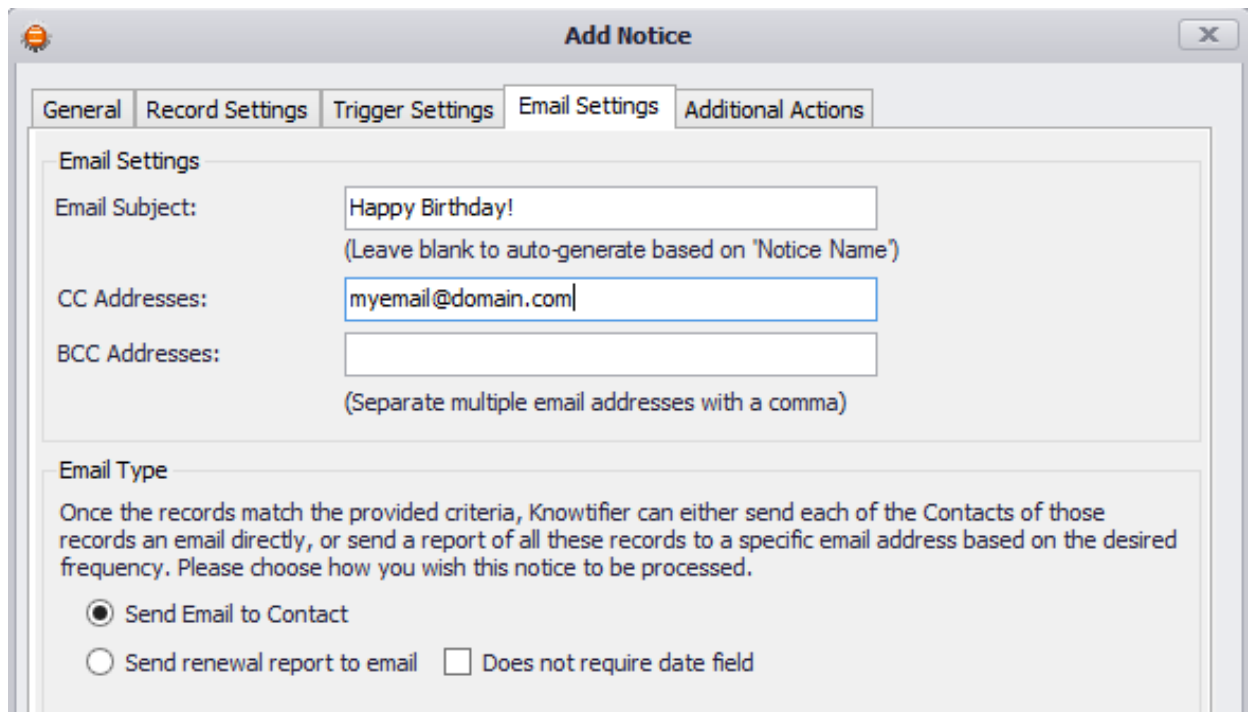


The screenshot shows the 'Add Notice' dialog box with the 'Trigger Settings' tab selected. The 'Date Field' dropdown is set to 'Date Field'. Under 'Anchor field settings', the 'Field Name' dropdown is set to 'Birth Date'. A note states: '\*\* Note: Only the day and month will be checked for 'Annual Event' fields'. Below this, a table shows the trigger configuration:

Day	Before / After
0	Before

Buttons for 'Add', 'Edit', and 'Delete' are visible on the right side of the table.

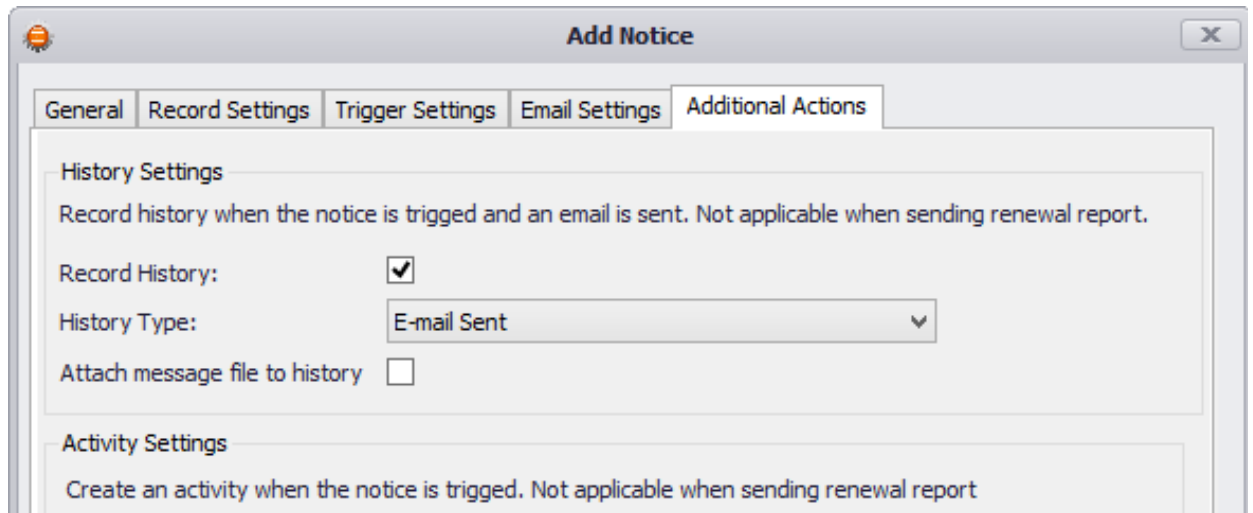
16. Click on the **Email Settings** tab, and give the email an appropriate subject and enter any email addresses to CC or BCC as required.
17. In the **Email Type** section, make sure that **Send Email to Contact** is selected.



The screenshot shows the 'Add Notice' dialog box with the 'Email Settings' tab selected. The 'Email Subject' field contains 'Happy Birthday!'. The 'CC Addresses' field contains 'myemail@domain.com'. The 'Email Type' section has the 'Send Email to Contact' radio button selected.

18. In the **Additional Actions** tab, you can perform certain actions such as record history, or create an activity for a user in your database. In this example, we would like to record a history once an email is sent, and set the history type to **Email Sent**.

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The screenshot shows a window titled "Add Notice" with a close button (X) in the top right corner. The window has five tabs: "General", "Record Settings", "Trigger Settings", "Email Settings", and "Additional Actions". The "Additional Actions" tab is selected. Inside this tab, there are two sections: "History Settings" and "Activity Settings".

**History Settings**  
Record history when the notice is triggered and an email is sent. Not applicable when sending renewal report.

Record History:

History Type:

Attach message file to history

**Activity Settings**  
Create an activity when the notice is triggered. Not applicable when sending renewal report

19. Finally, click **OK** to save the notice, and click **Apply** to save your settings. Your contacts will now receive an automated birthday notice on their birthdays!

Unique solution ID: #1000

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