Automator4Act

Designer Edition Product Manual

Keystroke.ca

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Automator4Act

Section I

1.1 Software Compatibility and System Requirements.

Automator4Act is compatible with ACT! 2005 through ACT! 2011

To work properly and reliably Automator4Act requires that all system requirements for ACT! be met on the system. These requirements are determined by software version. Please refer to the system requirements documentation for the versions you are using to verify compatibility.

Automator4Act also requires .Net framework version 1.1. If this is not installed, you will receive a prompt to download it from the Microsoft website.
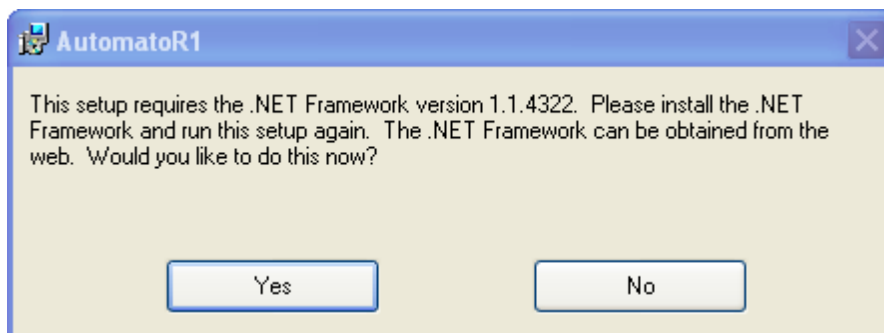
1.2 Installation.

Obtain the software by downloading it from https://www.keystroke.ca/en/apps/keystroke-downloads/summary/21-keystroke-products/142-automator4act.html

Before installation of Automator4Act it is recommended you close all open applications, including ACT!

Automator4Act is packaged in a single installation file and this will extract and install all components on the system. Double-clicking the install file will launch the Setup Wizard.

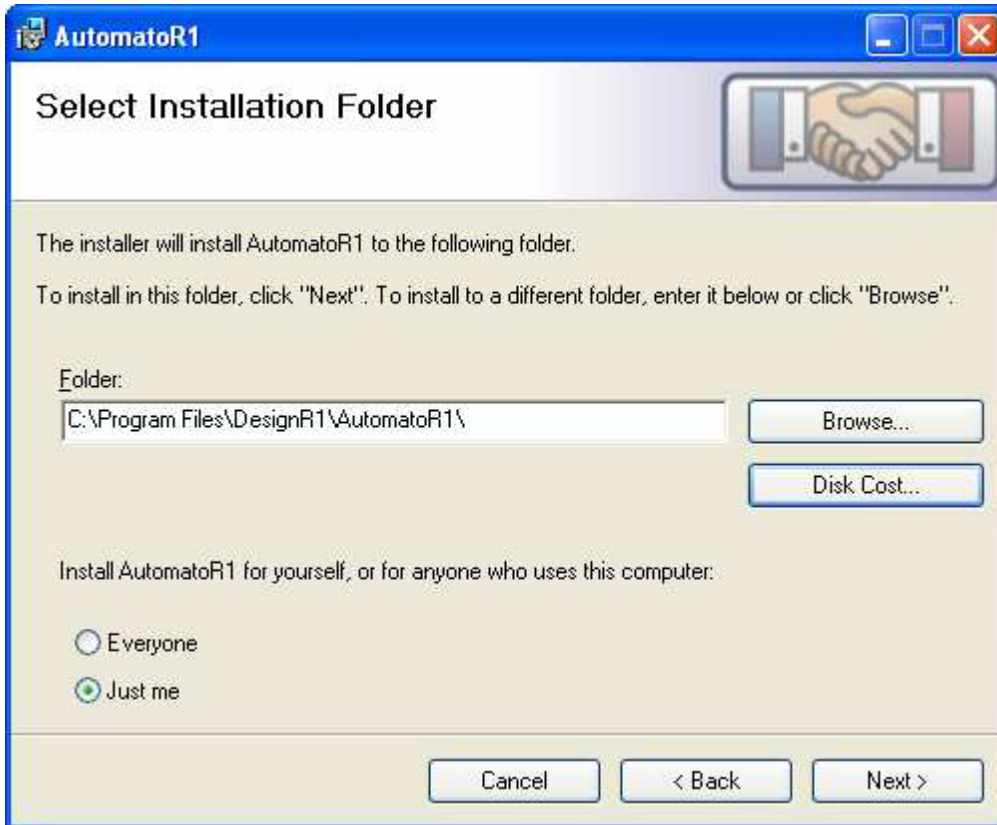If .Net Framework 1.1 is not present the follow message will appear:

Clicking **Yes** will direct you to a Microsoft downloads page where you can acquire .Net 1.1.

It will be necessary to launch the installation again after .Net 1.1 has been installed.
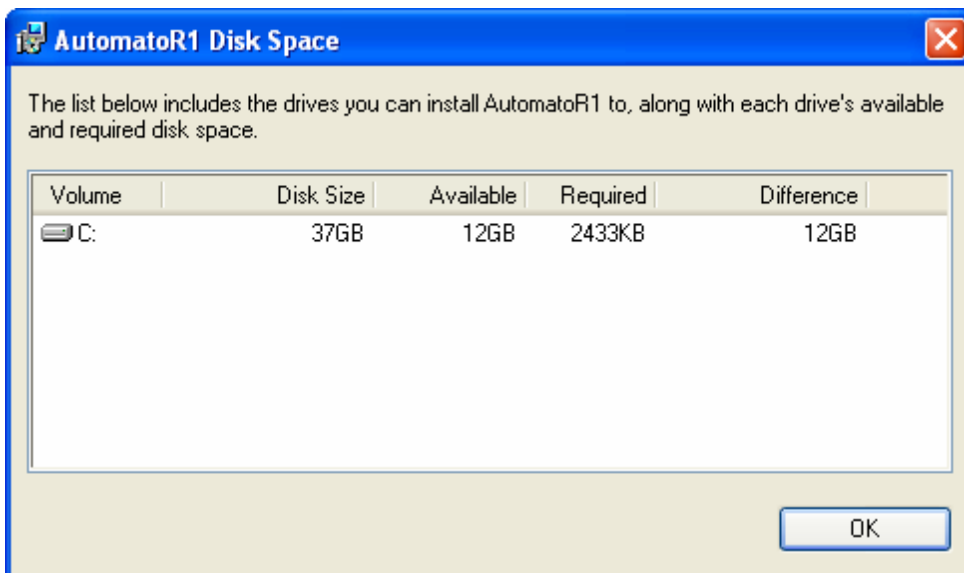
After verifying that .Net 1.1 is installed, the setup wizard will continue.

<Insert Picture Setup up wizard first screen>

To proceed with installation click **Next**. This next section will allow you to customize some of the installation options. In most cases the default settings will work best.

Also from this screen you can choose Disk Cost… This will show the available hard disk space for installation and tell you the amount required for Automator4Act (2433 KB).

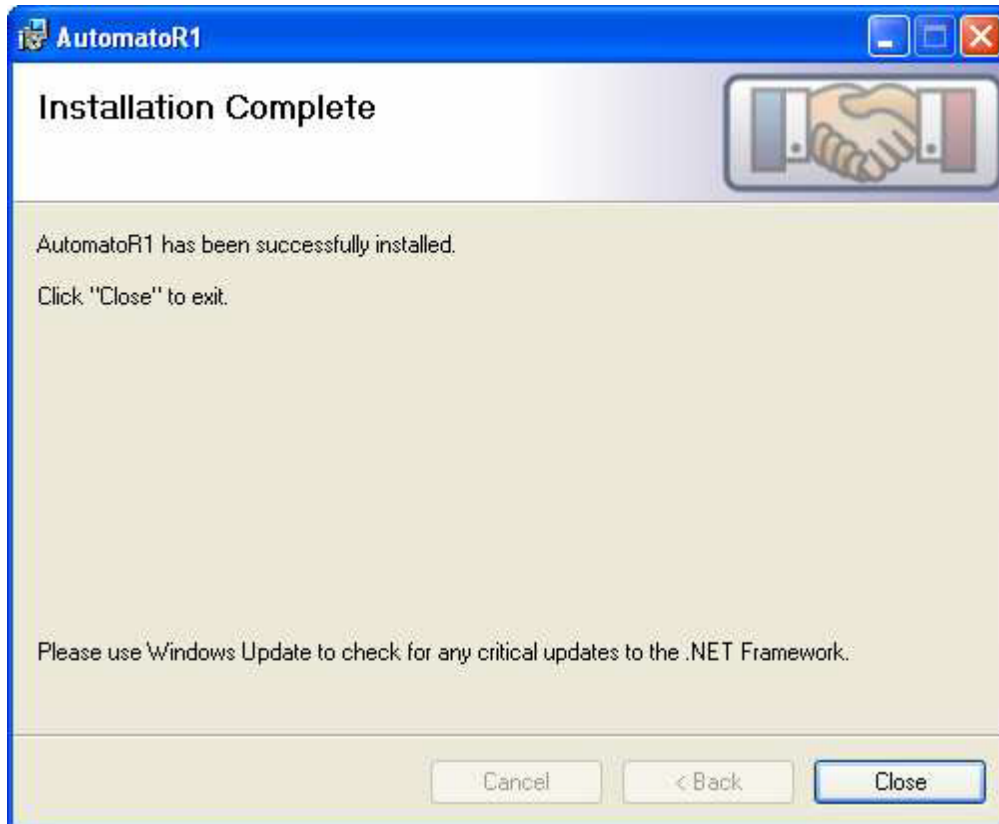After picking your installation preferences, the Setup Wizard will continue after clicking **Next**.

During installation a progress bar will appear.

<Insert a picture of progress bar here>

When the installation is complete a dialogue box will appear.

1.3 Registering Automator4Act

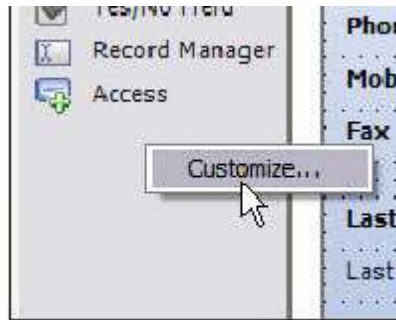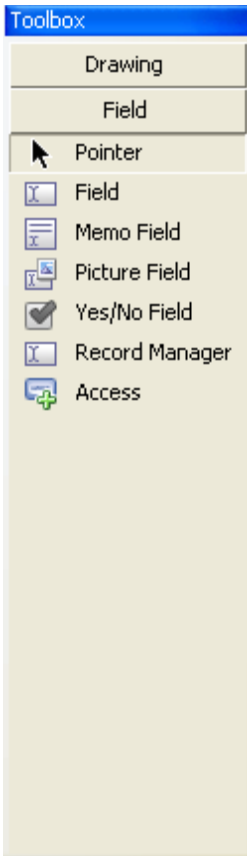To register Automator4Act after installation, you must click on the Help menu in ACT! and choose Register Automator4Act…

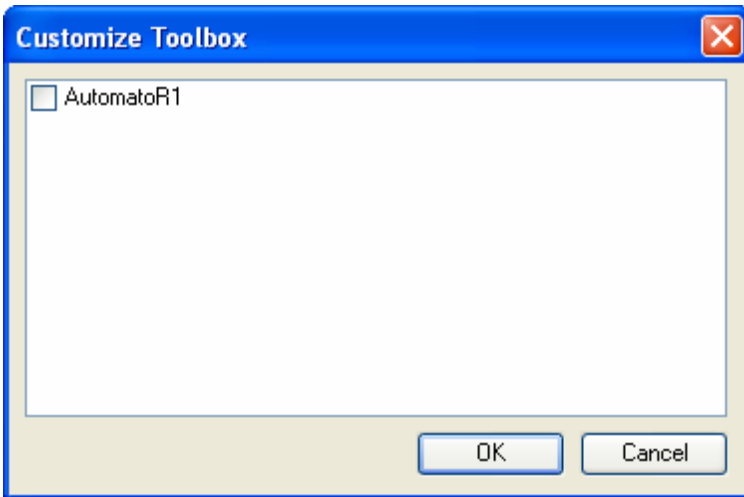<Insert a picture of Automator4Act Register Screen>

Section II

Using Automator4Act

2.1 Adding Automator4Act options to the ACT! Layout Designer.

Automator4Act works within the ACT! layout designer. To make Automator4Act available in the ACT! layout designer, it is necessary to right-click in the layout designer toolbox and then choose Customize…
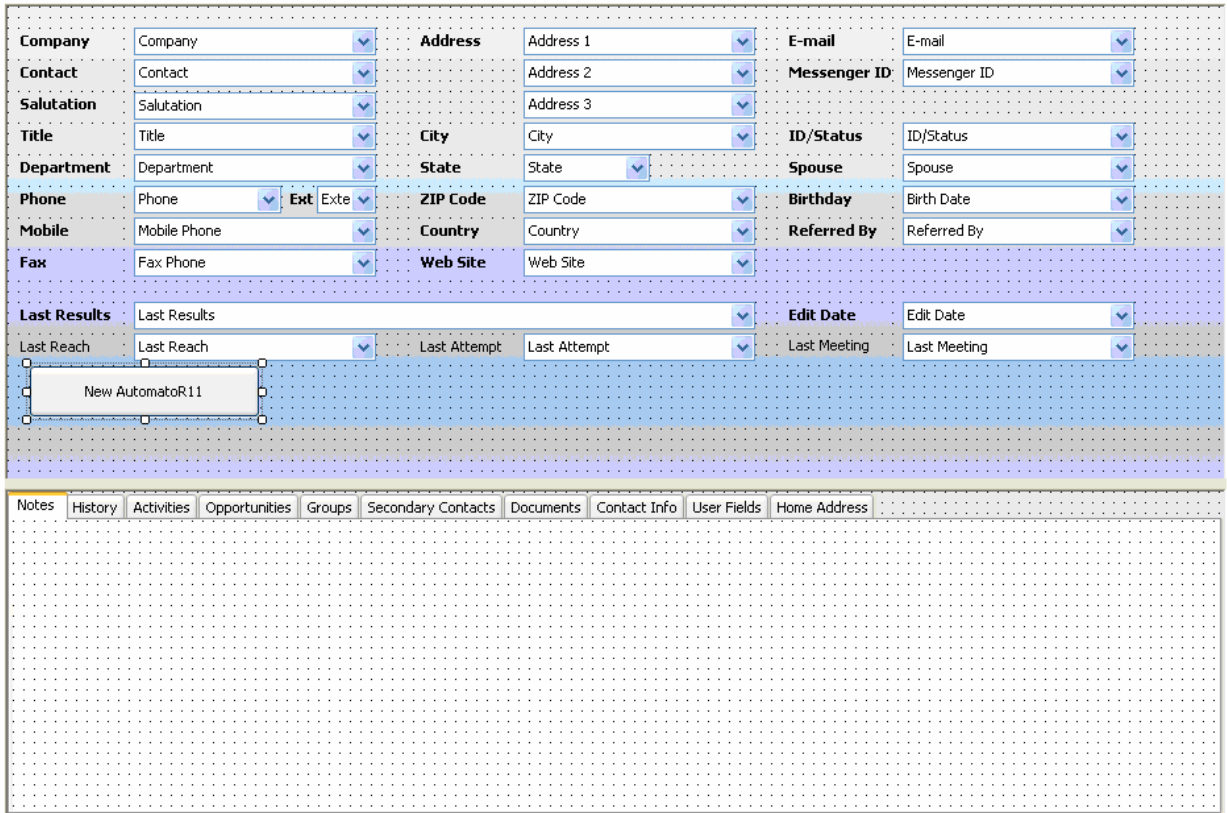
In the Customize Toolbox menu, check off Automator4Act.

2.2 Adding Automator4Act buttons to ACT! layouts.

After adding Automator4Act to the Layout Designer toolbox, a new section called "Custom" will appear and under Custom an option for Automator4Act will appear.
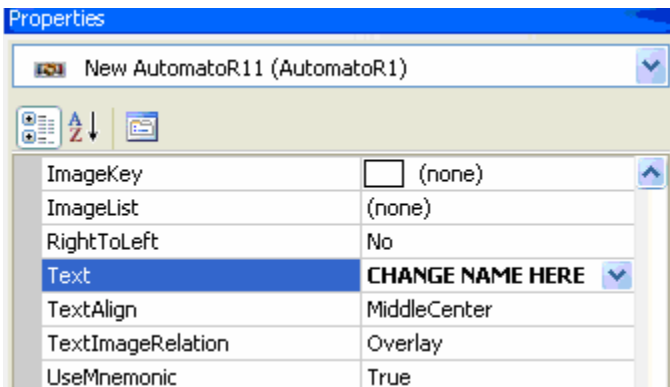
<Insert Picture of Toolbox> <Insert Picture of toolbox w/ automator>

After choosing Automator4Act a new button can be placed on the layout.

2.3 Configuring Automator4Act buttons on ACT! layouts.
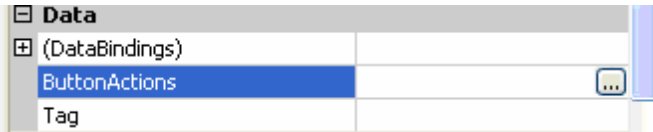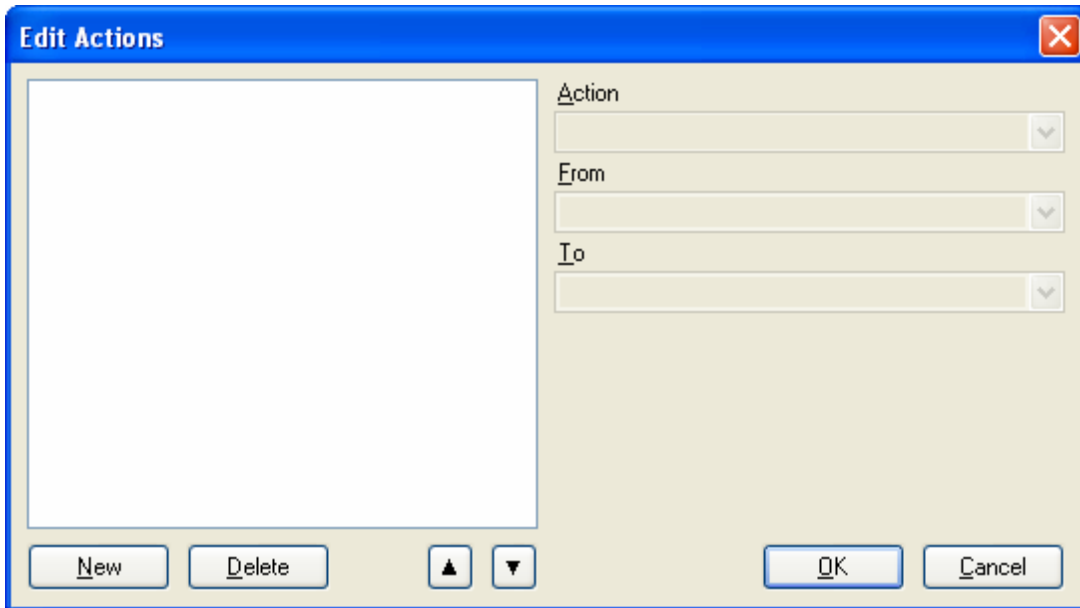
Automator4Act buttons use a default naming scheme when first created. This can be changed by adjusting the Text property in the properties window for the button.

After setting the Automator4Act button on the layout and adjusting the name, the button properties can be changed by modifying the ButtonActions property under data in the properties window for the button.

Click the ellipses (…) in the ButtonActions box and the Automator4Act Edit Actions dialogue will appear.

To create a new action click the New button. This will enable the Action dropdown which will have situational options beneath it.

<Insert Picture of Edit Actions>

An individual Automator4Act button can have multiple actions configured to launch when clicked. They are processed in order from top to bottom. Changes made with the Automator4Act button are applied to the current contact when applicable.

2.4 Automator4Act button actions.

There are 16 actions available with Automator4Act. These actions are defined below.

Append Data

This action will append data to any field in the database specified for the current contact. This value may be a static value (for example "Apples"), the contents of another field identified with braces (for example "{spouse}" or with a complex expression.

Copy Data

This action will copy data from one specified field to another on the current contact. This action will overwrite the data in the target field.

Delete Data

This action will delete the data in the target field.

Driving Directions

This action will use Google Maps or MapQuest (as selected) to map driving directions from the My Record's home or main address to the current contact's home or main address.

Go To

This action will perform a defined lookup for company, contact or group data. If there are no results found, no action will be taken. This function can be used to perform static lookups for specific data (for example the city of Chicago) or a matching field based off of the current contact noted in braces (for example a contact search for data {city} will return all contacts in the same city as the current contact).

Insert Data

This action will insert a value at the beginning of the target field. This can be static data (for example "Apples") or the contents of another field identified by braces (for example "{spouse}").

Math

This action will perform a specified mathematical equation. This can be a simple static equation ("5+5"), a conditional equation ("{Amount Owed} * (.08 * (365 / DaysSince({Create Date})))") or even extremely complex equations involving If statements, sin(), cos(), tan(), exponents, and other mathematical operators and methods.

Move Data

This action will move the data from one specified field to another for the current contact. The data will be removed from the original field.

Range Lookup

This action will perform a function identical to Go To but will prompt for a range when the lookup is completed if there are more than 1 records matching the criteria. For example, if a lookup returns 300 results the Range Lookup can be set to only return 1-99.

Resolve Zip Code

This action will resolve the Zip+4 for the current contact from the specified address block (main or home).

Run Program

This action will launch a specified program. Command line parameters can be set for this action.

Schedule Activity

This action will schedule an activity based upon a date in the current contact.

Set Data

This action will overwrite the data in the specified field with a static value ("Apples") or another field in braces ("{spouse}").

Set Source Record

This action will allow Automator4Act actions to pull data from a specified contact other than the current record when initiated.

String Manipulation

This action will process complex equations for the specified field on the current contact. This is identical in function to the Set Data action but will automatically call Eval() on the value.

Swap Data

This action will swap data between two specified fields.

Support

If you are still experiencing problems please contact our support team on:
service@kqc.ca