DesignR1

AutomatoR1

Product Manual

DesignR1 Software, LLC.

877-755-9029

Software Compatibility and System Requirements

AutomatoR1 is compatible with ACT! 2005 through Current

To work properly and reliably AutomatoR1 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.

AutomatoR1 also requires .Net framework version 1.1. If this is not installed, you will receive a prompt to download it from the Microsoft website.
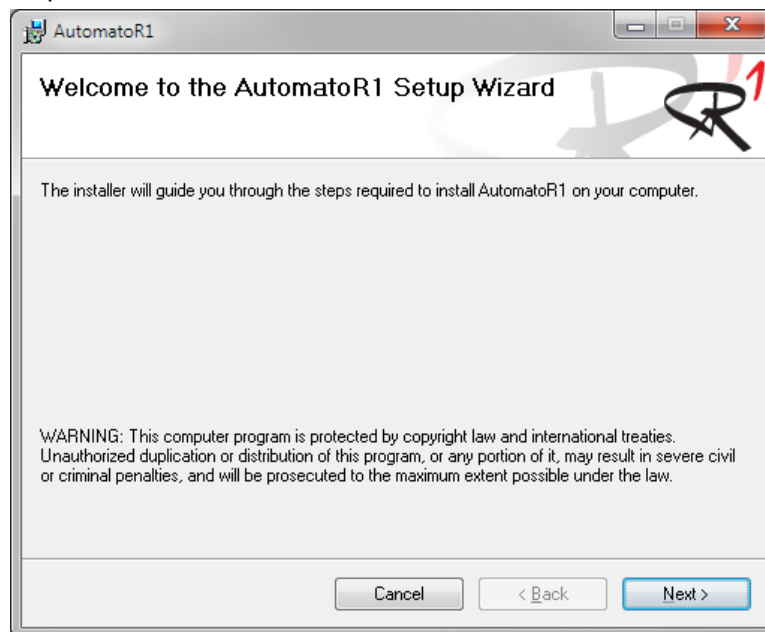
Installation

Obtain the software by downloading it from http://www.designr1.com/downloads/AutomatoR1Setup-2.2.4.msi

Before installation of AutomatoR1, it is recommended you close all open applications, including ACT!

AutomatoR1 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.
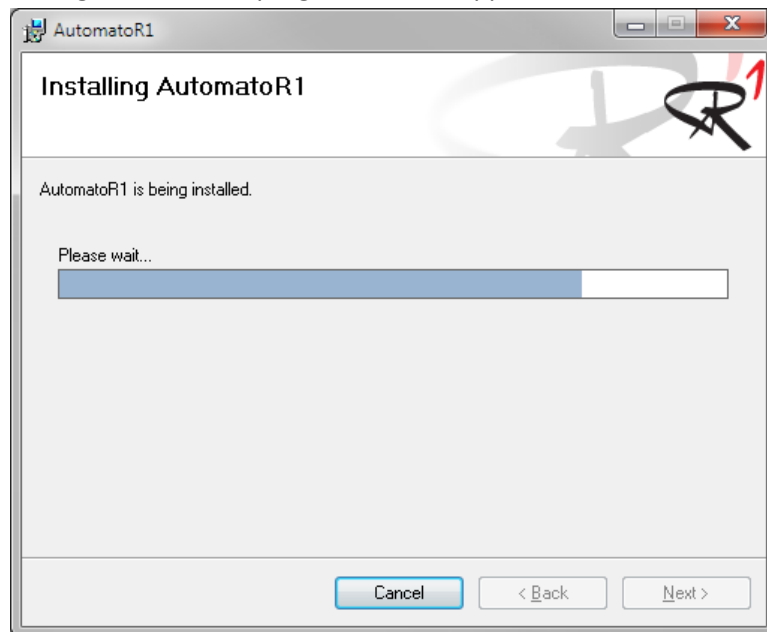
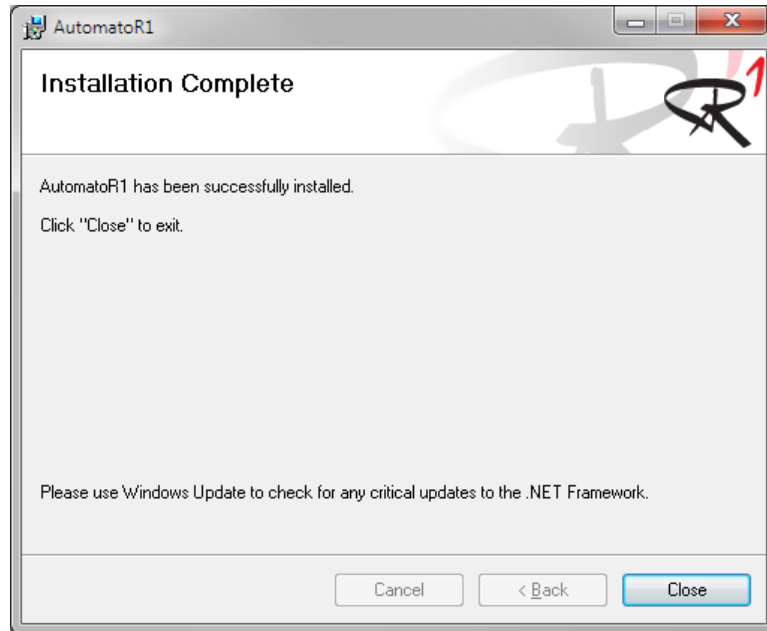1. To proceed with installation click **Next**.

2. After picking your installation preferences, the Setup Wizard will continue after clicking **Next**.
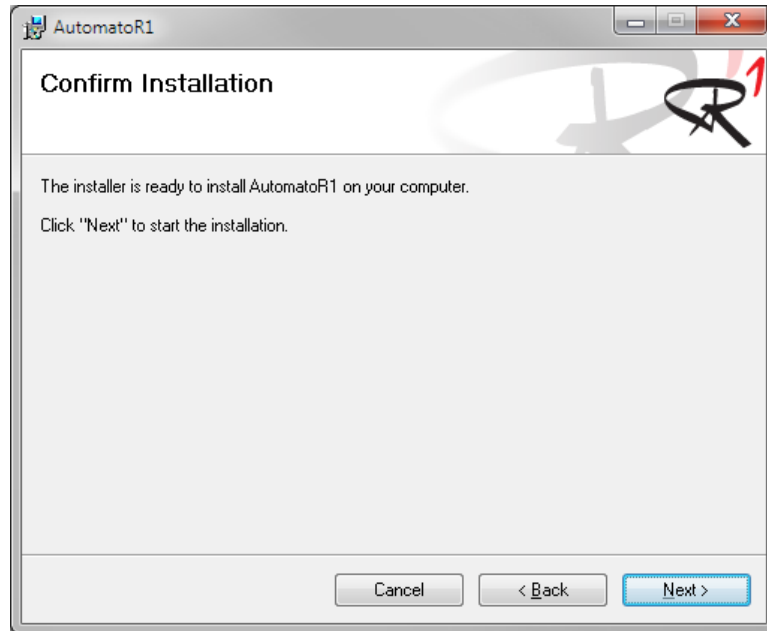
3. During installation a progress bar will appear.

4. When the installation is complete a dialogue box will appear, click **Close** to complete the installation.
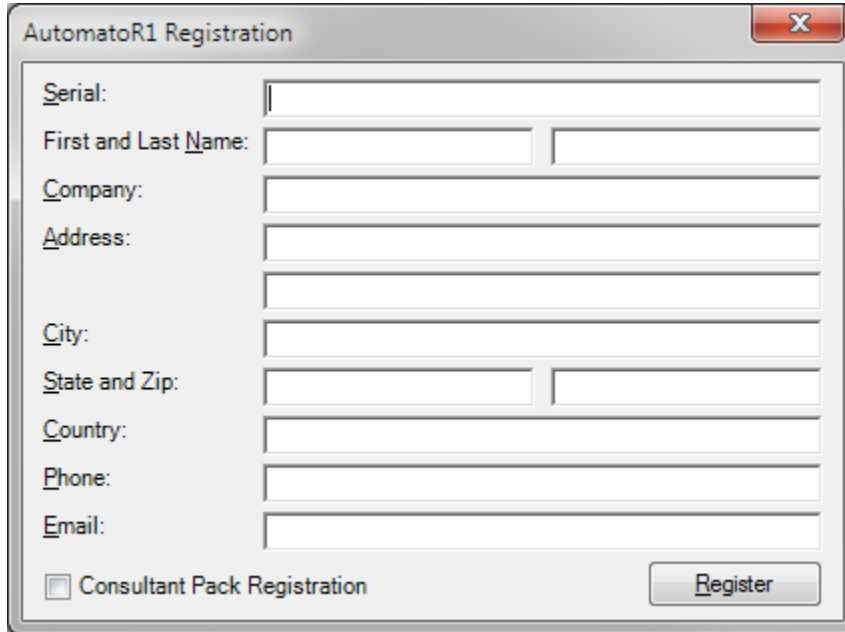

Registering AutomatoR1

There are two instance where the registration will pop up for you to register:

1. If you load a layout with no AutomatoR1 buttons on it yet when you place a button the Register pop up will be presented.
2. If you load a layout with an AutomatoR1 button already on it, the registration pop up will be presented when ACT! loads up.
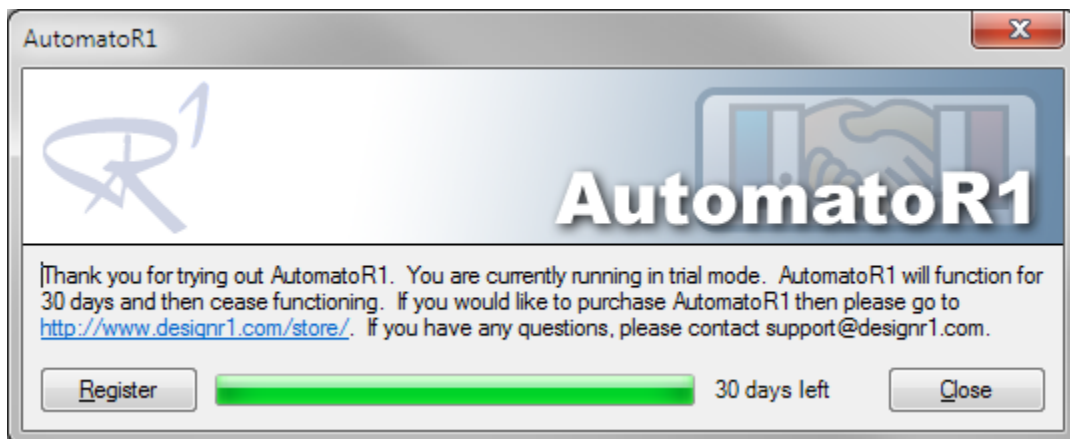
On the first screen press the **Register** button and the following screen will be displayed.


After you fill in your Registration info press the **Register** button, it may take a few seconds. A green message saying you've been activated will appear on the bottom of the screen to the left of the Register button. If it did not register correctly a red message will display in the same location saying why it didn't register correctly.
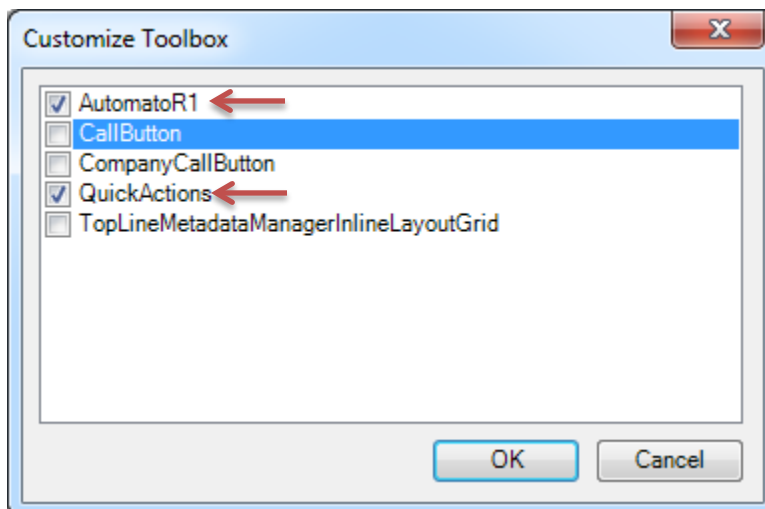
Using AutomatoR1

Adding AutomatoR1 options to the ACT! Layout Designer

AutomatoR1 works within the ACT! layout designer. To make AutomatoR1 available in the ACT! layout designer, it is necessary to right-click in the layout designer toolbox and then choose Customize…
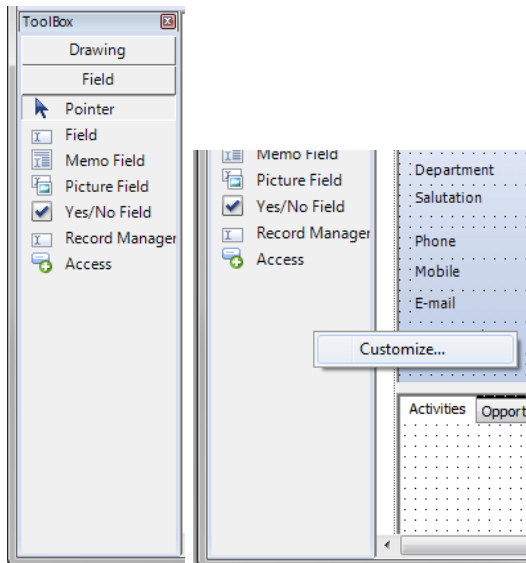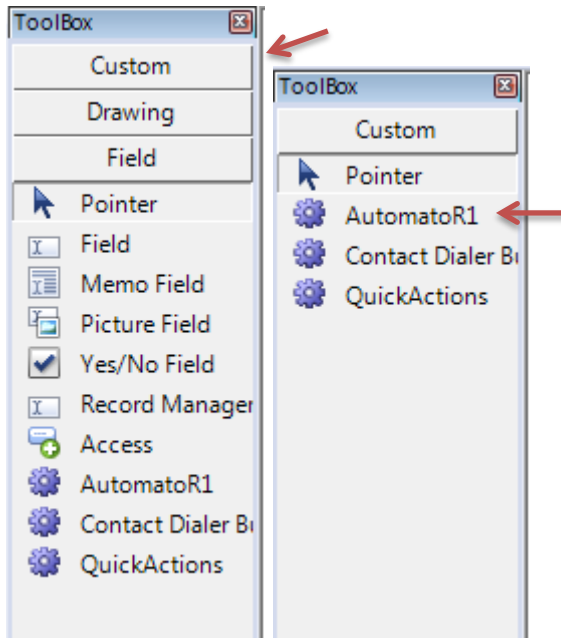

In the Customize Toolbox menu, check off AutomatoR1 and QuickActions
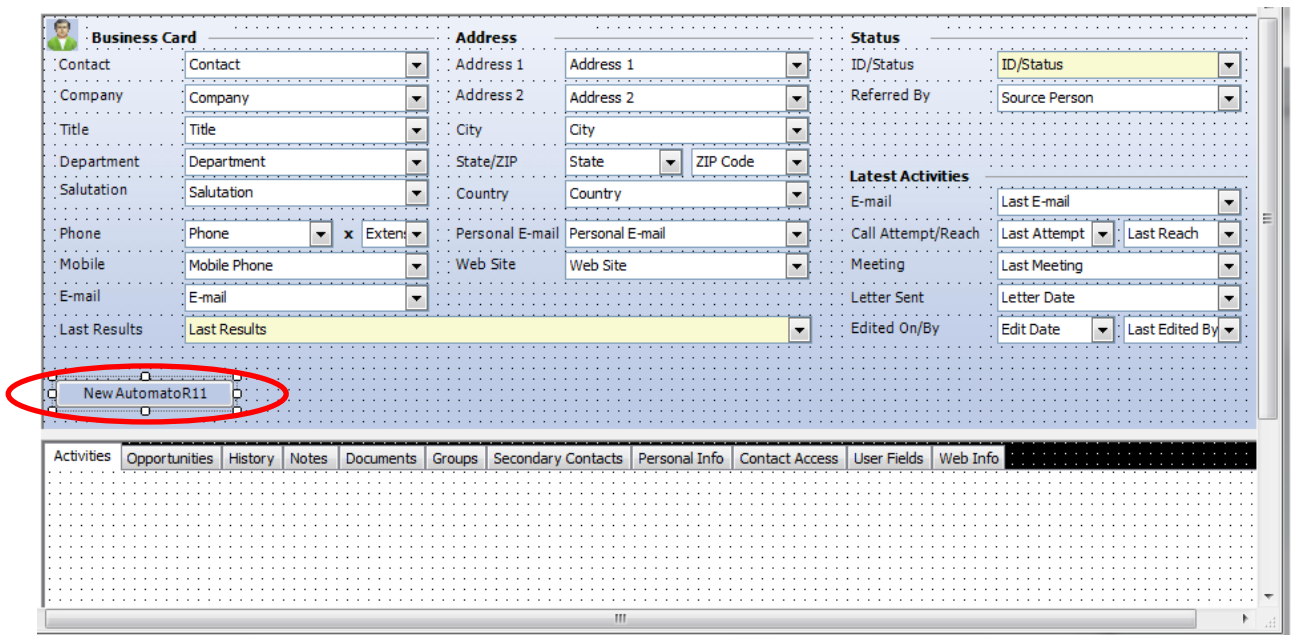
Adding AutomatoR1 buttons to ACT! layouts

After adding AutomatoR1 to the Layout Designer toolbox, a new section called "Custom" will appear and under Custom an option for AutomatoR1 and QuickActions both appear.
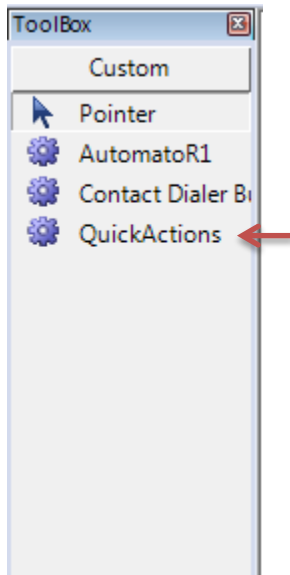

After choosing AutomatoR1 a new button can be placed on the layout.
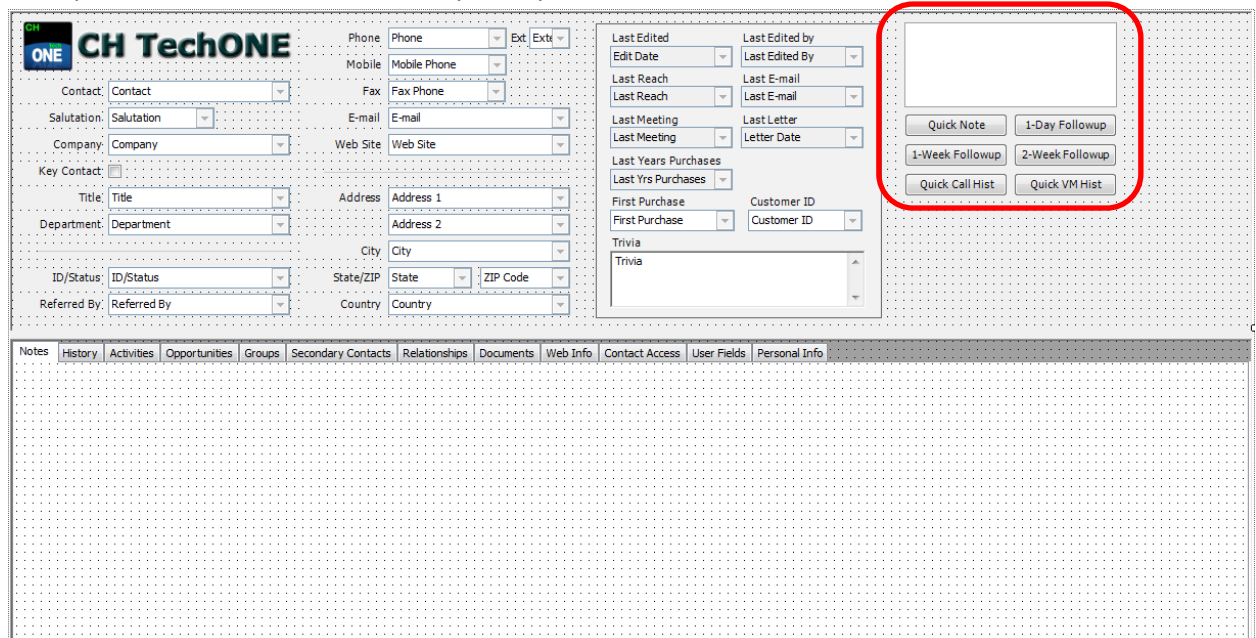
Adding QuickAction buttons to ACT! layouts

Simply add the QuickActions buttons by clicking on the QuickActions option in the ToolBox


Then place in the desired location on your layout.

Please note that this can be placed on any layout. QuickActions is not customizable. If you would like to edit the actions you will have to build the custom buttons.

## Configuring AutomatoR1 Buttons on ACT! Layouts

AutomatoR1 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.
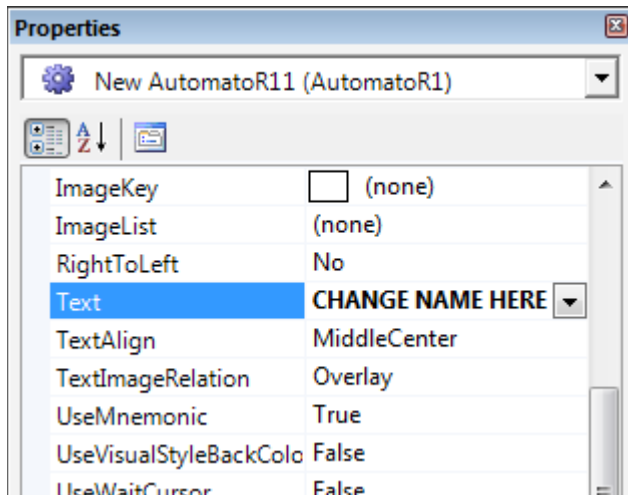

After setting the AutomatoR1 button on the layout and adjusting the name, the button properties can be changed by modifying the ButtonActions property under data in the properties window for the button.
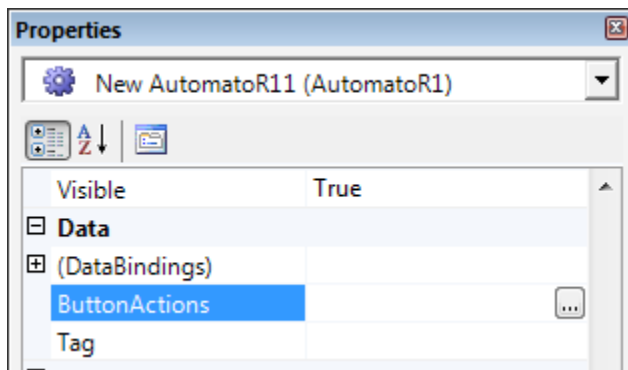
Click the ellipses (…) in the ButtonActions box and the AutomatoR1 Edit Actions dialogue will appear.
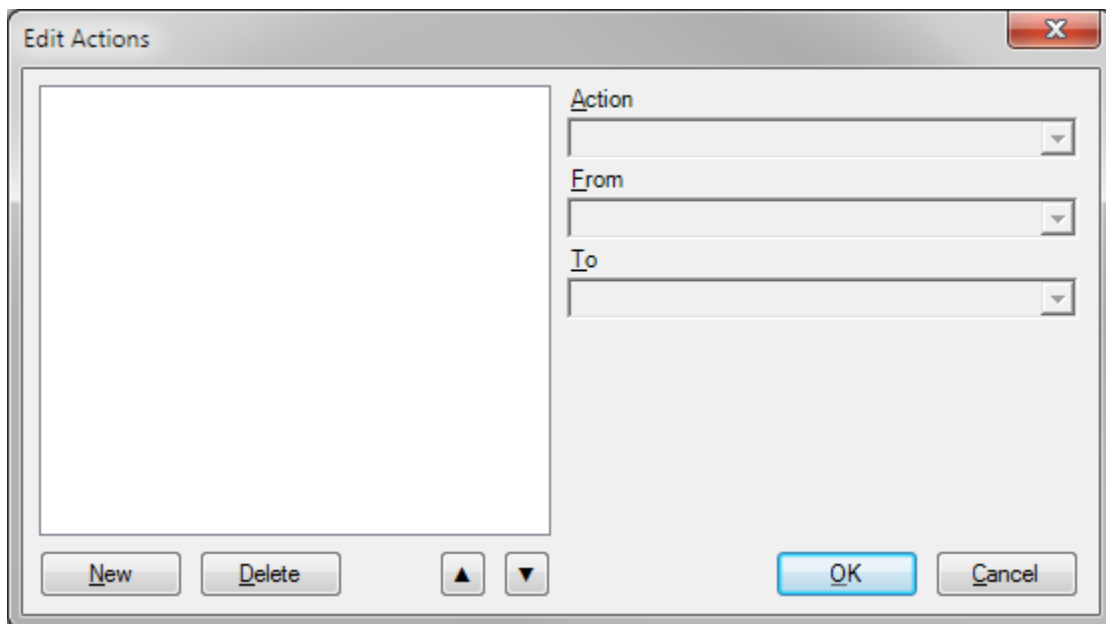
To create a new action, click the **New** button. This will enable the Action dropdown which will have situational options beneath it.
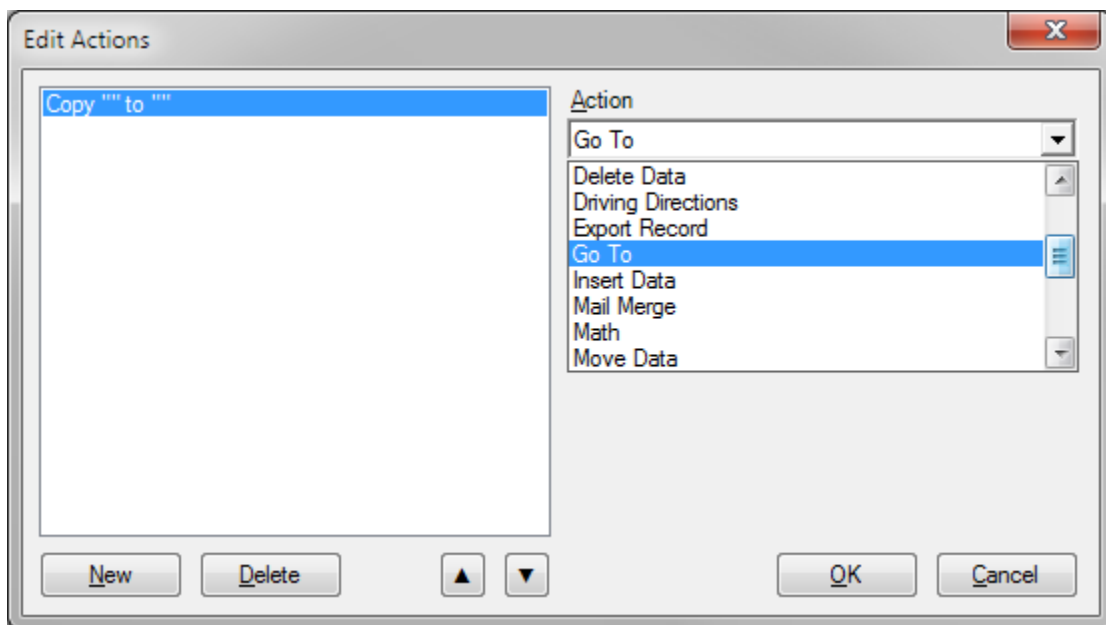
An individual AutomatoR1 button can have multiple actions configured to launch when clicked. They are processed in order from top to bottom. Changes made with the AutomatoR1 button are applied to the current contact when applicable.

AutomatoR1 Button Actions

There are 16 actions available with AutomatoR1. 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.

Example: If the salutation filed value started out as "Fred" and the value in the spouse field was "Wilma" the button would change the salutation field to read "Fred & Wilma"
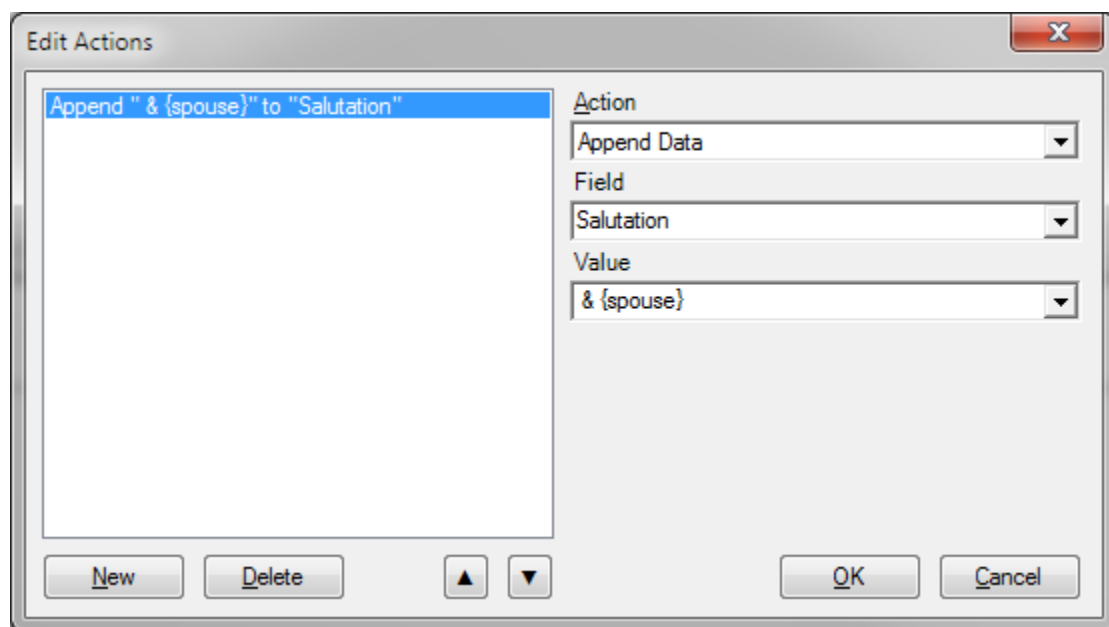
Copy Data

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.

Example: A button could be created to copy an address to a mail merge address block for the purpose of mail merges. So if a contact has 3 addresses, a button could be created for each address block that would allow that address data to be copied to the mail merge address block. Copying data overwrites any value that may currently be in that field
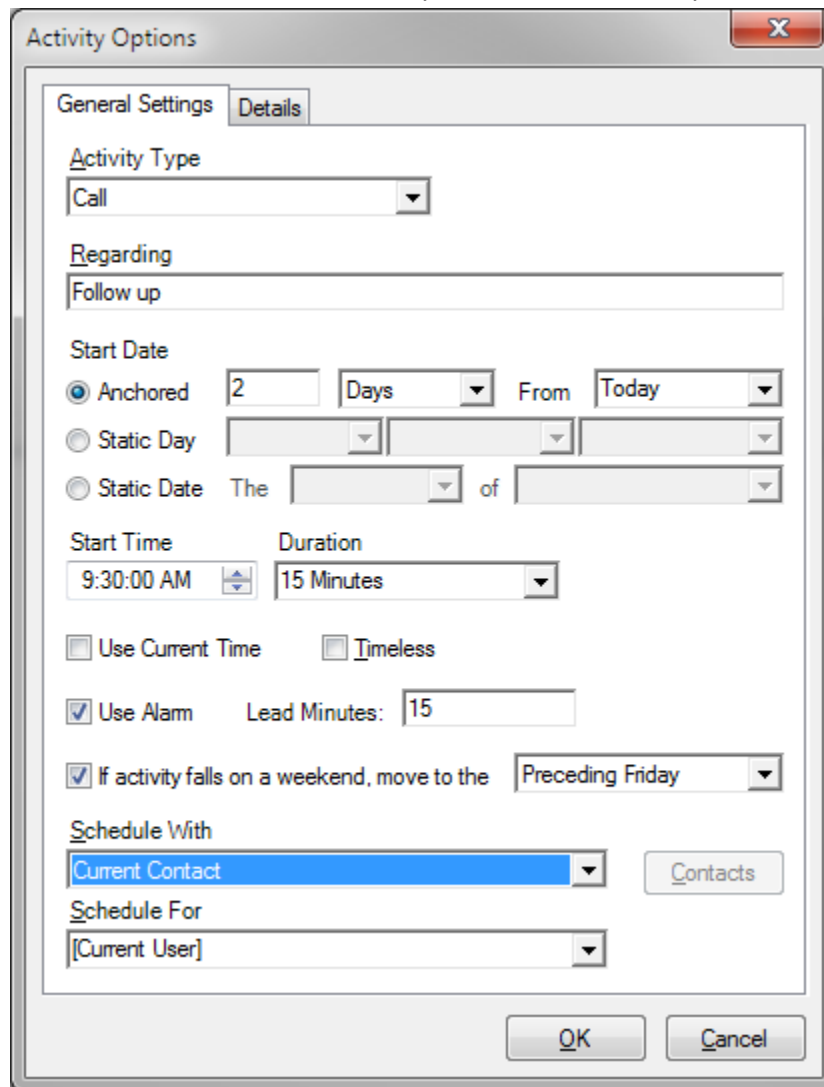
Delete Data

This action will delete the data in the target field.

Create Activity

This action will create an activity based on the settings you define in the Activity Options dialog

Example: Creating a button for a sales person that would create an Activity to follow up with the current contact 2 days from the day the button was press at 9:30am and will ring an alarm 15minues before the appointment. Also if the activity scheduled ends up on a weekend you can set it to be scheduled for the Friday before or the Monday after.

Create History

This action will create a History with the parameters sent in the History Options dialog.

Example: Creating a button that will create a history on the current record saying that the current month's invoice has been sent.
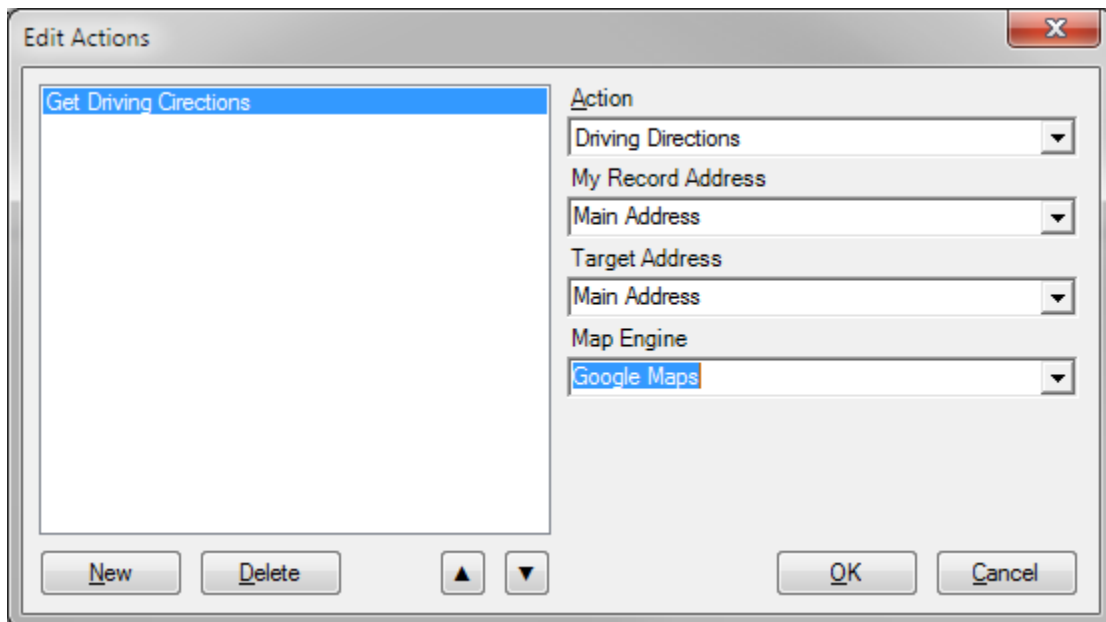
Create Note

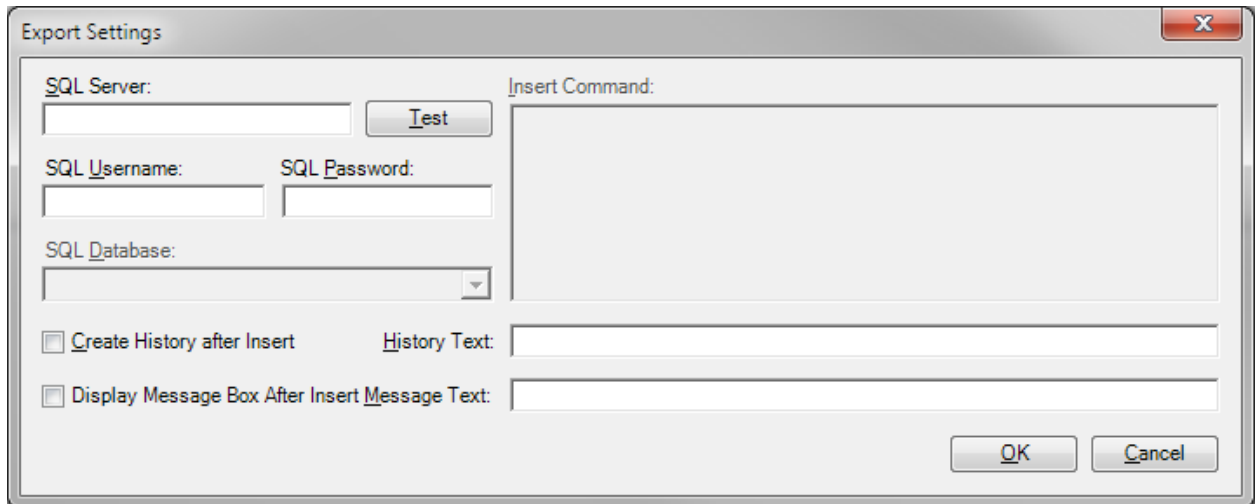This action will create a Note with a predefined text on the current record.
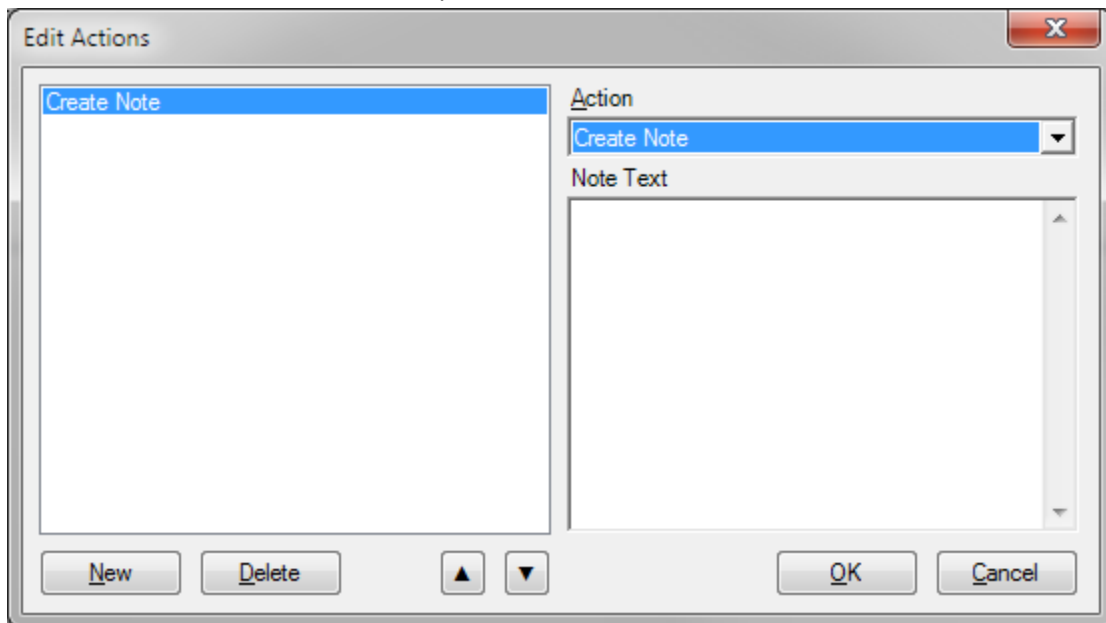
Driving Directions

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.

Export Record

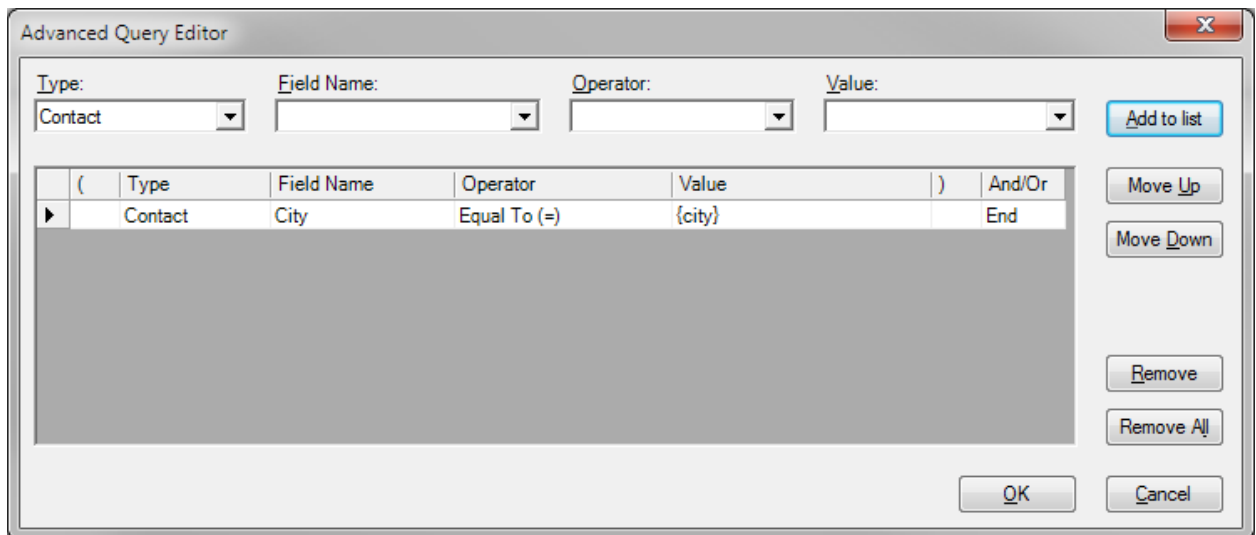This action will copy a record to a specified SQL database.

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}").

Mail Merge
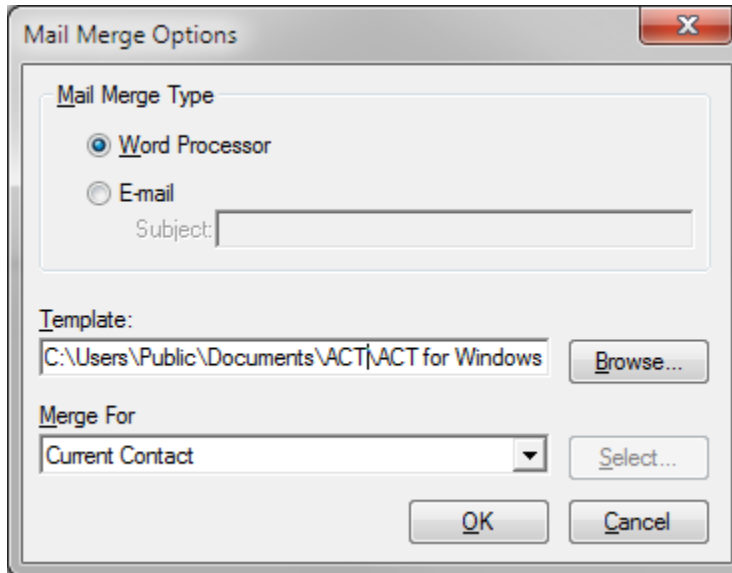
This action will perform a mail merge on a specified Template for a specified record or set of record defined in the Mail Merge Options dialog.


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.
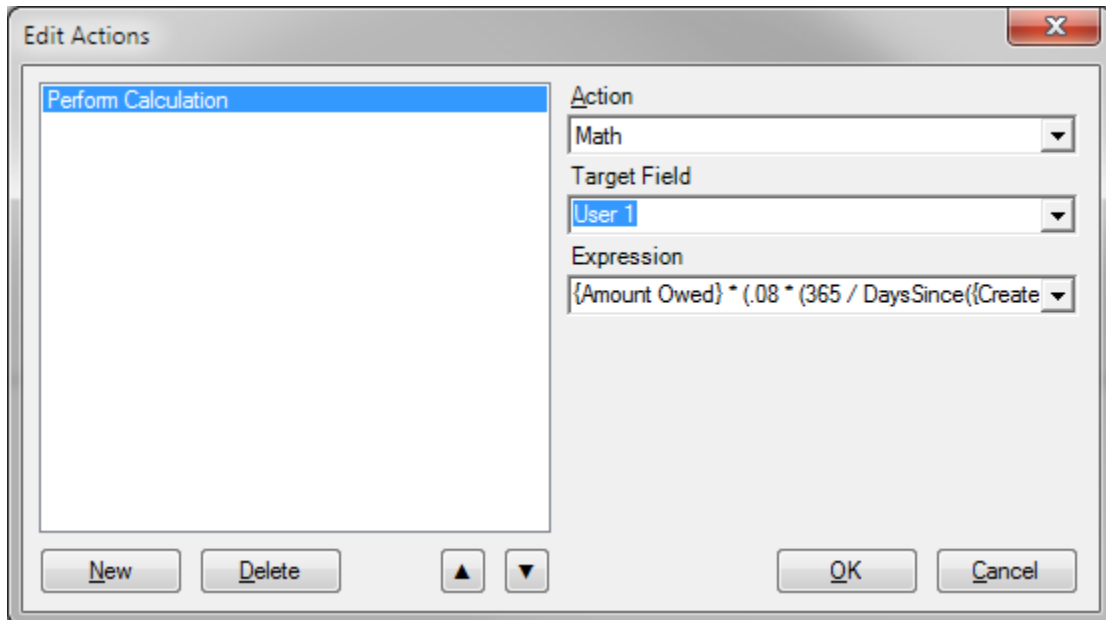
Move Data

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.
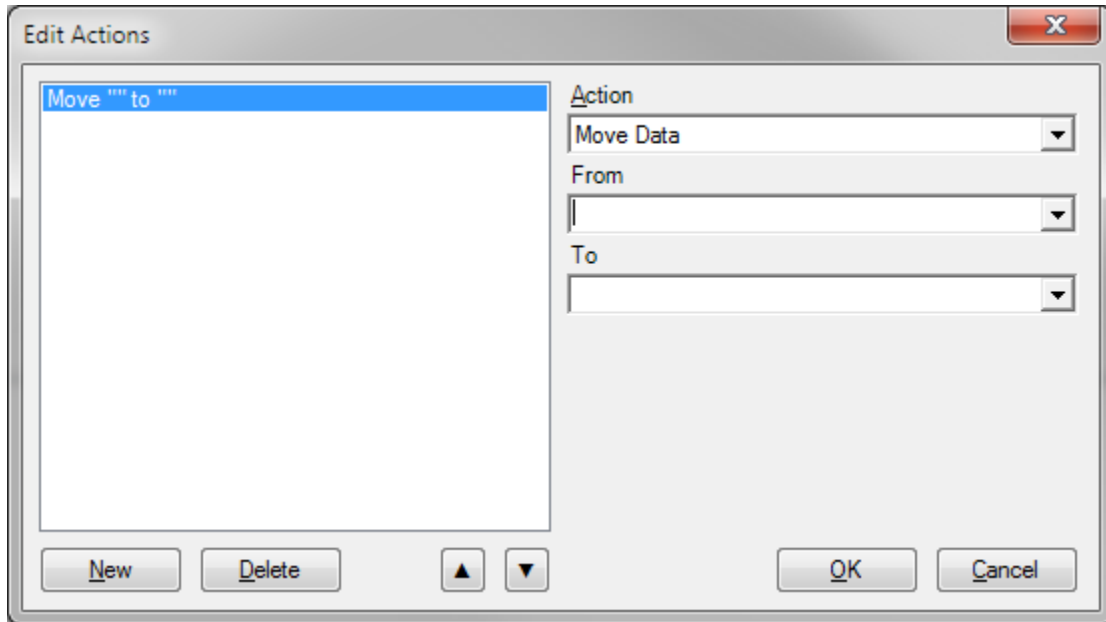
Prompt to Continue

This action could be placed in a list of other actions to verify you'd like to continue with the actions the button is about to execute.

Example: creating a prompt that would ask if you'd like to continue to turn a contact into a customer. A no would stop the button action and a yes would allow the button to continue on to the next action in the action list for that button.
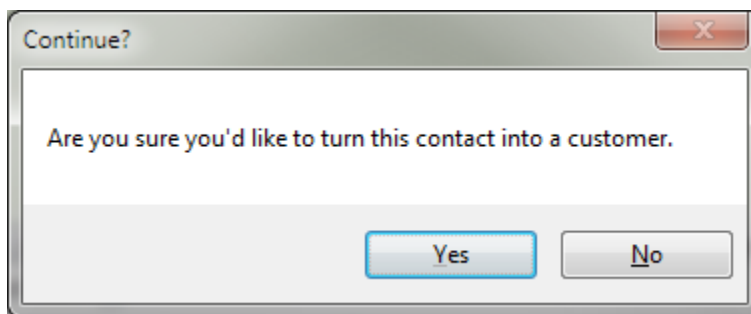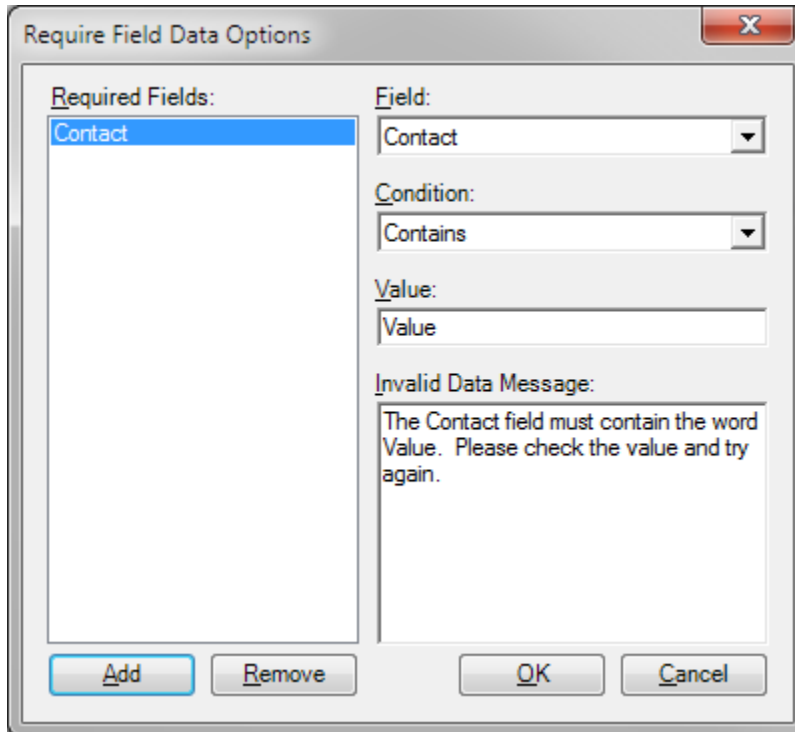

Range Lookup

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.
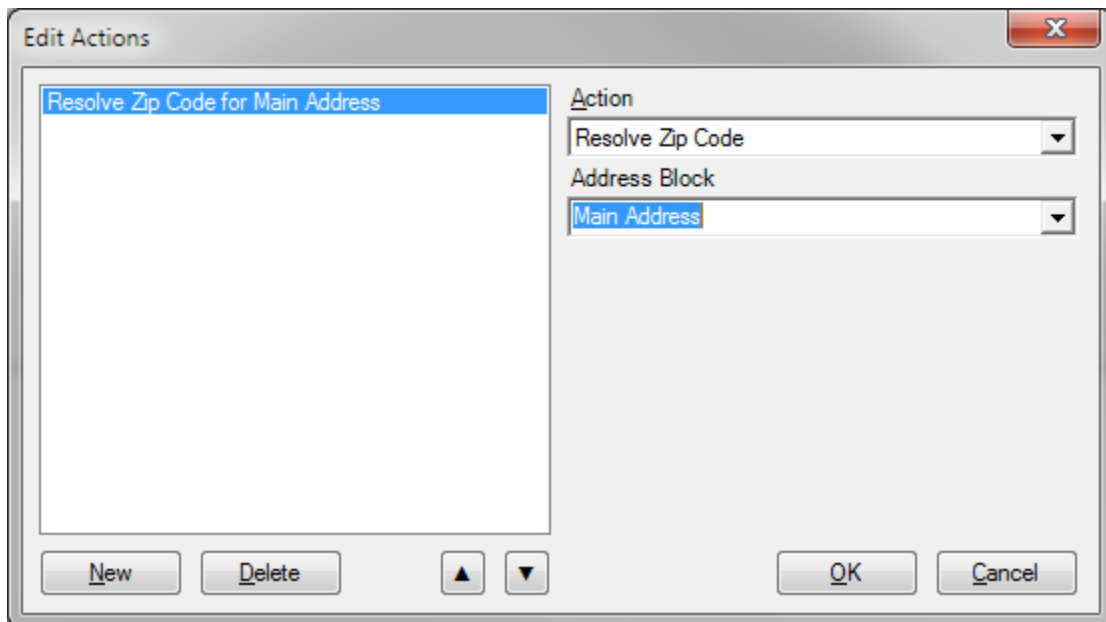
Require Field Data

This action will can be placed into a button to make a certain field or set of fields required in order to proceed with the rest of your actions.

Resolve Zip Code

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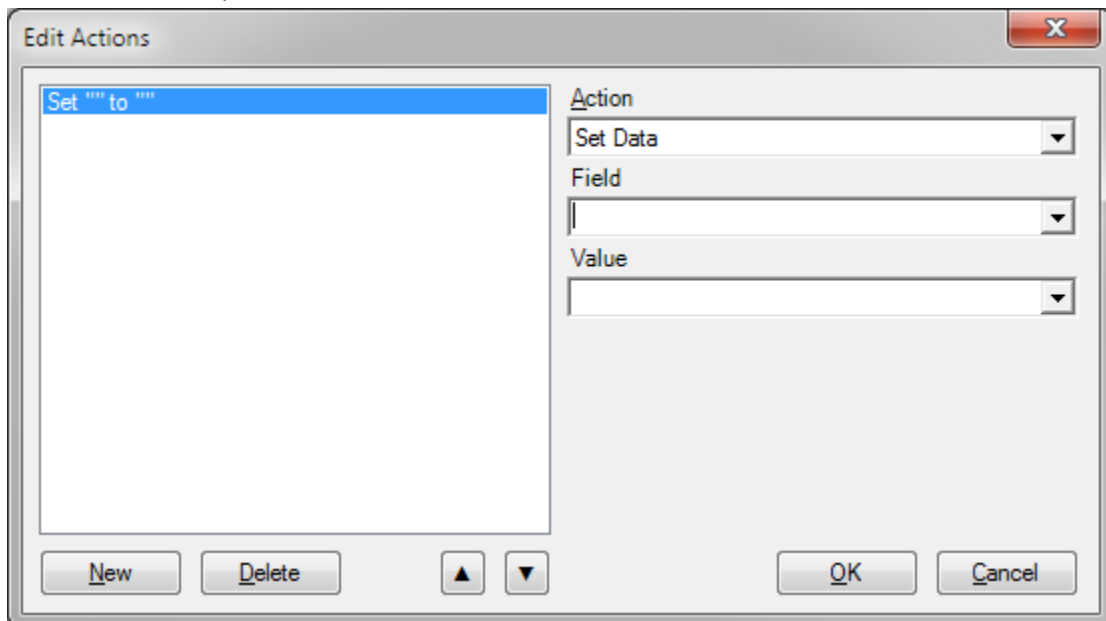
Run Program

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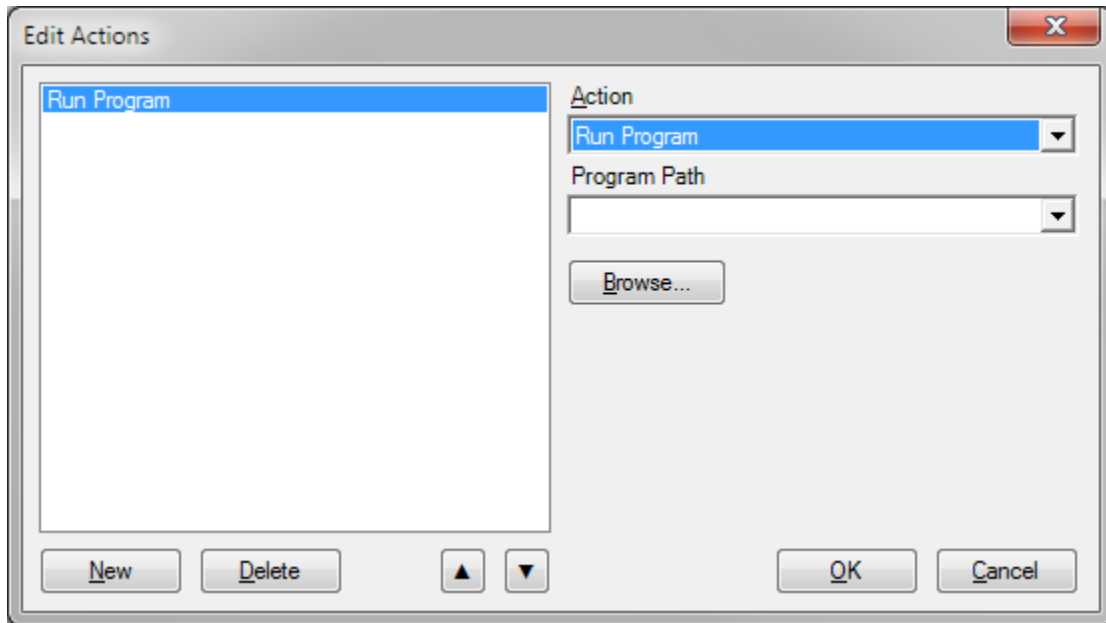
Set Data

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 AutomatoR1 actions to pull data from a specified contact other than the current record when initiated allowing you to do other actions after that like copying data from the newly set source record.
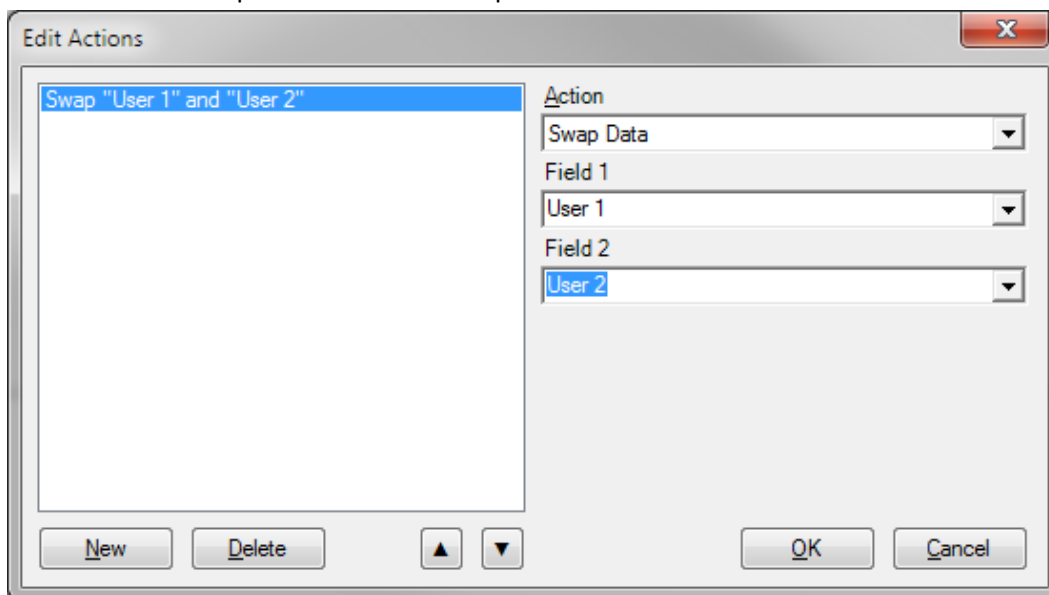
String Manipulation

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.
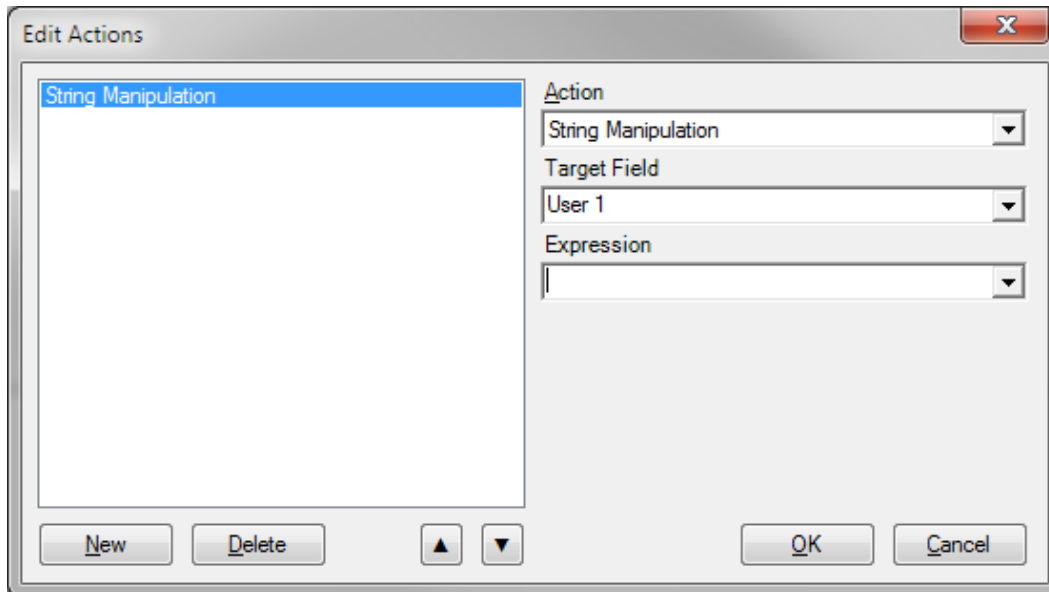
Swap Data

This action will swap data between two specified fields.

Support

If you are experiencing problems please contact our support team at:
877-755-9029 or support@designr1.com