



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

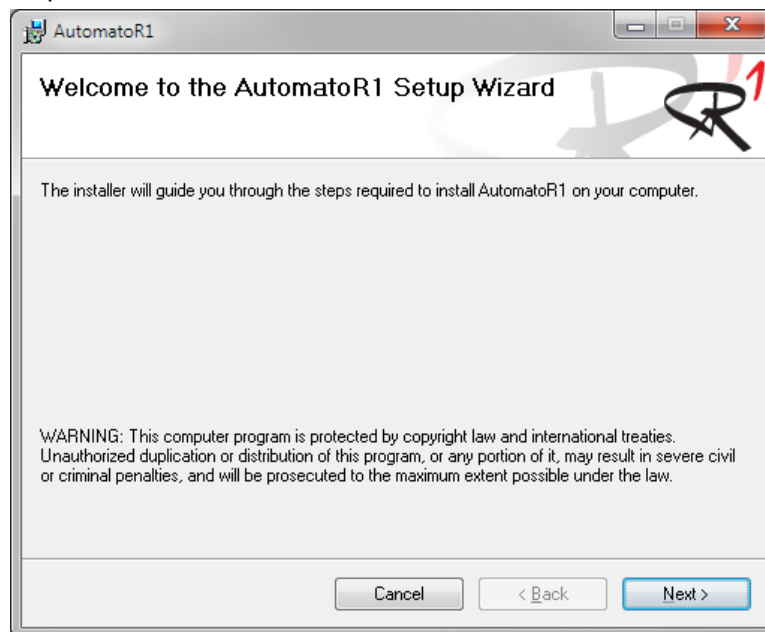
Obtain the software by downloading it

from <http://www.designr1.com/downloads/AutomatoR1Setup-2.2.4.msi>

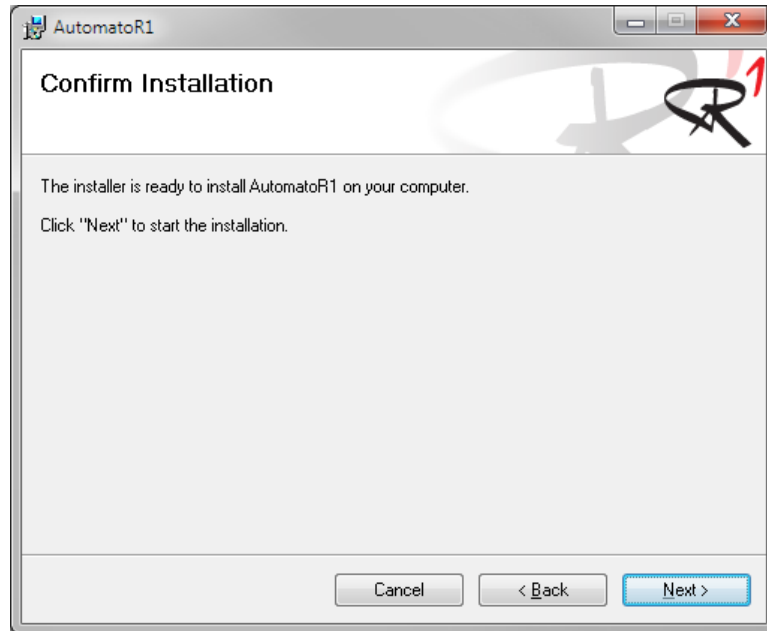
Before installation of AutomatoR1, it is recommended you close all open applications, including ACT!

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.

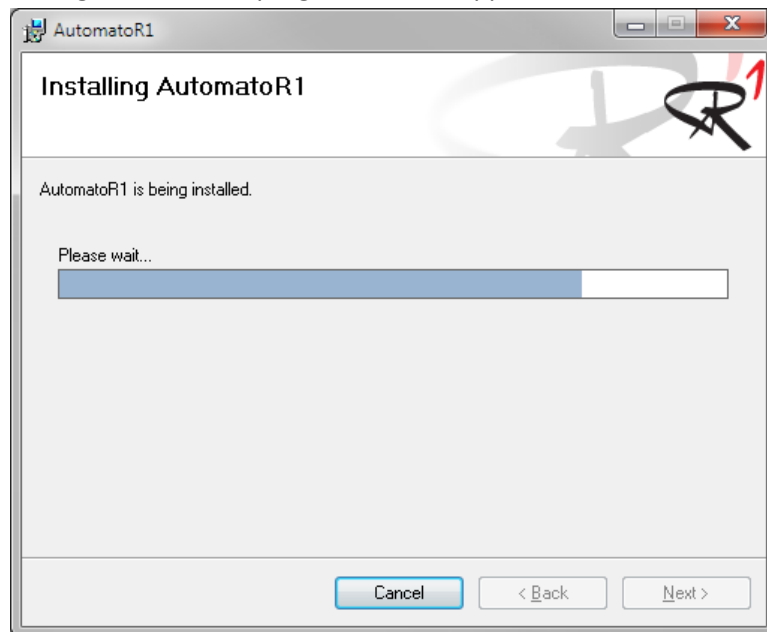
1. To proceed with installation click **Next**.



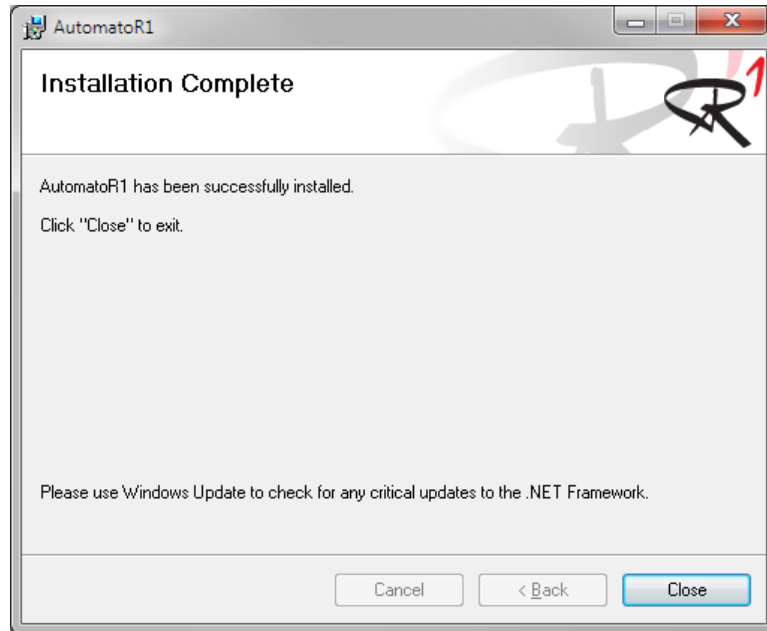
2. After picking your installation preferences, the Setup Wizard will continue after clicking **Next**.



3. During installation a progress bar will appear.



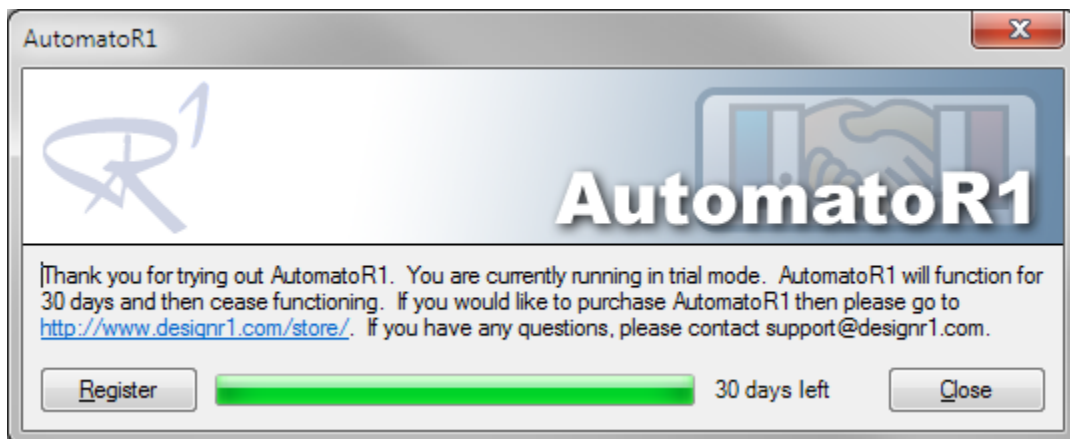
- When the installation is complete a dialogue box will appear, click **Close** to complete the installation.



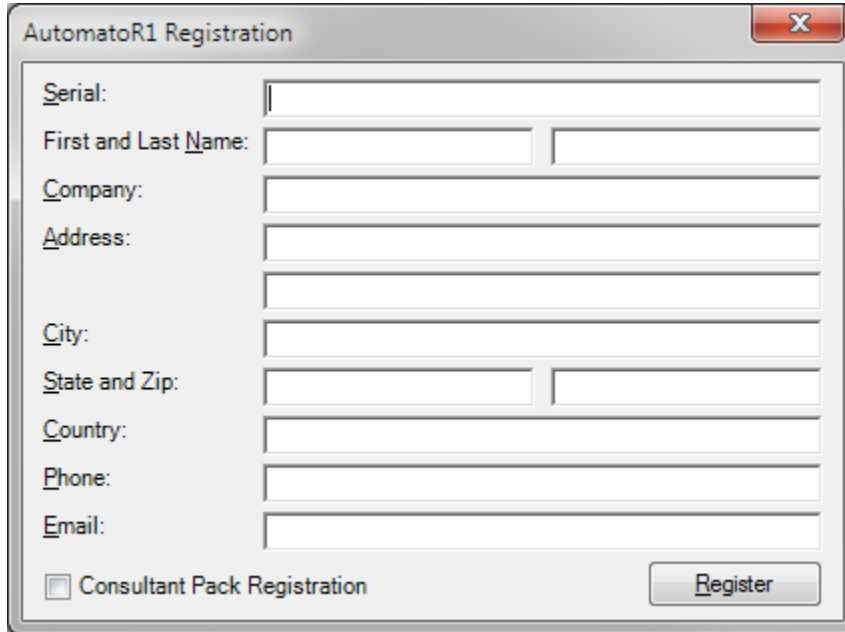
Registering AutomatoR1

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

- If you load a layout with no AutomatoR1 buttons on it yet when you place a button the Register pop up will be presented.
- 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.



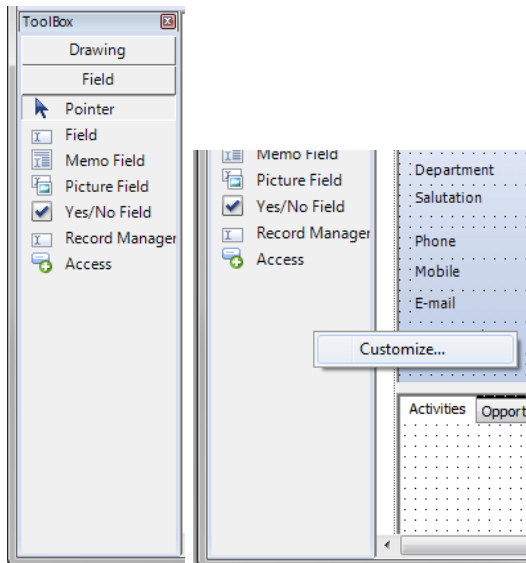
The image shows a Windows-style dialog box titled "AutomatorR1 Registration". It contains several text input fields for registration information: "Serial:", "First and Last Name:" (split into two boxes), "Company:", "Address:" (split into two boxes), "City:", "State and Zip:" (split into two boxes), "Country:", "Phone:", and "Email:". At the bottom left, there is a checkbox labeled "Consultant Pack Registration". At the bottom right, there is a button labeled "Register". The dialog box has a standard Windows window border with a close button (X) in the top right corner.

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.

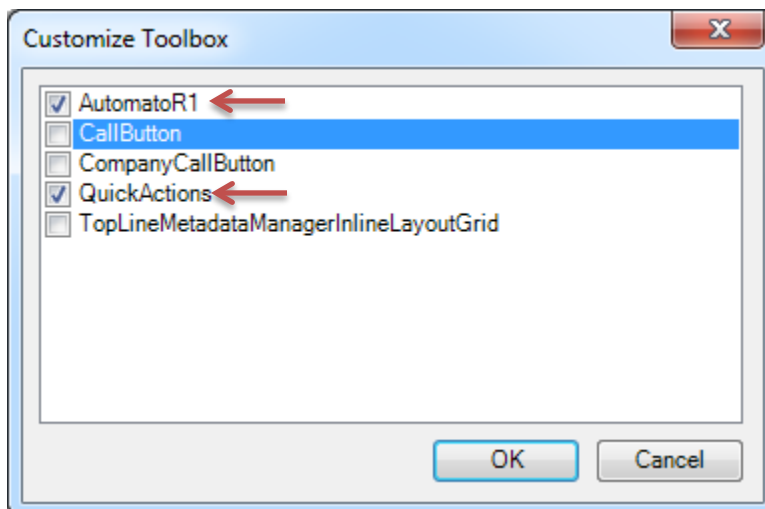
Using AutomatoR1

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...

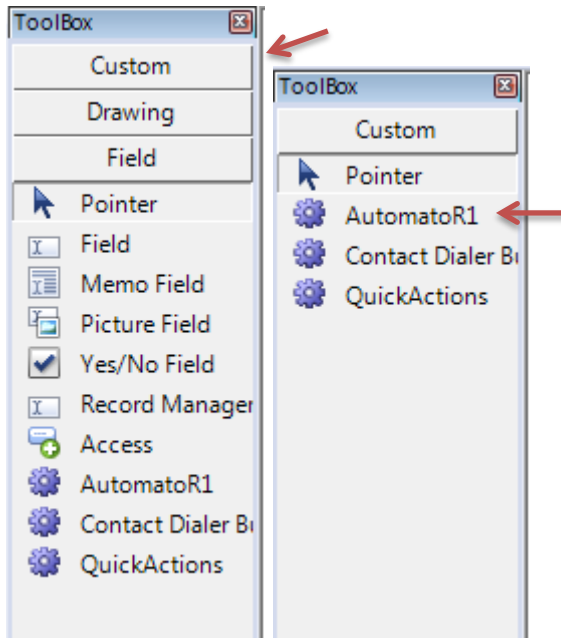


In the Customize Toolbox menu, check off AutomatoR1 and QuickActions

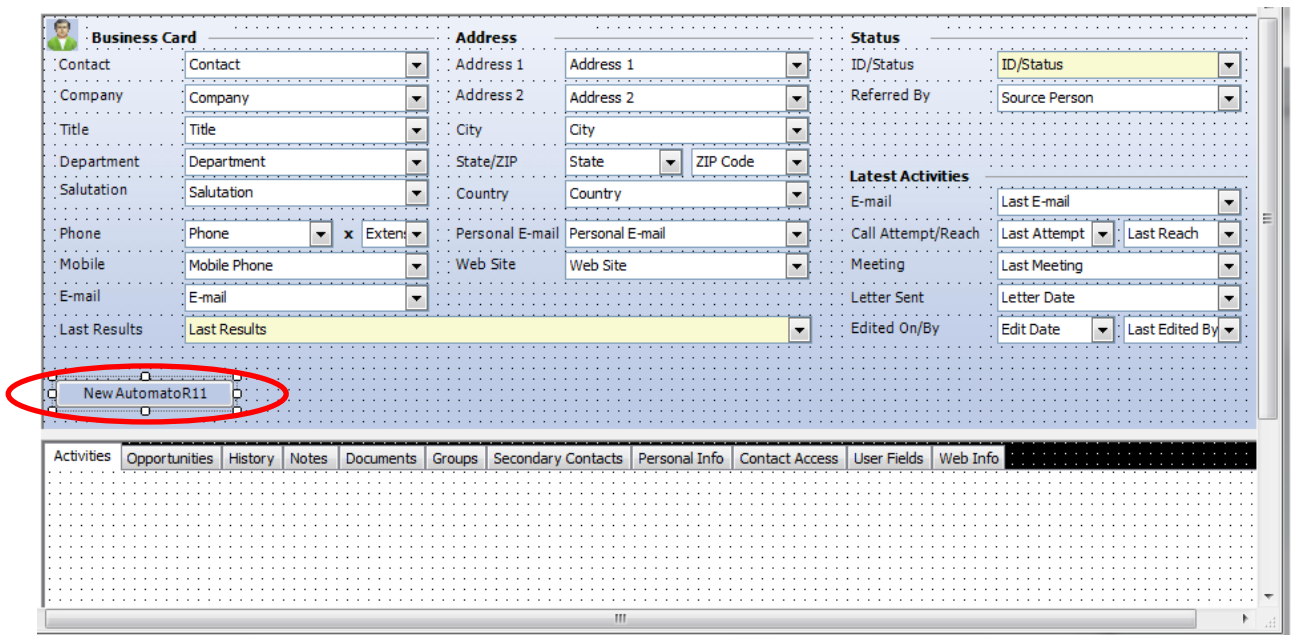


Adding Automator1 buttons to ACT! layouts

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.

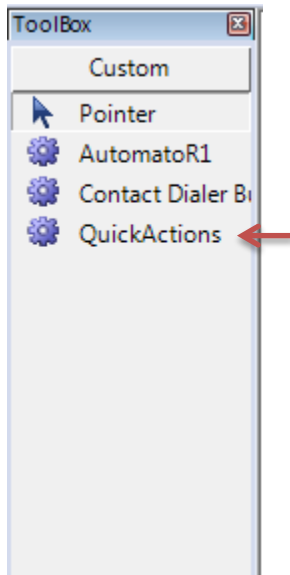


After choosing Automator1 a new button can be placed on the layout.

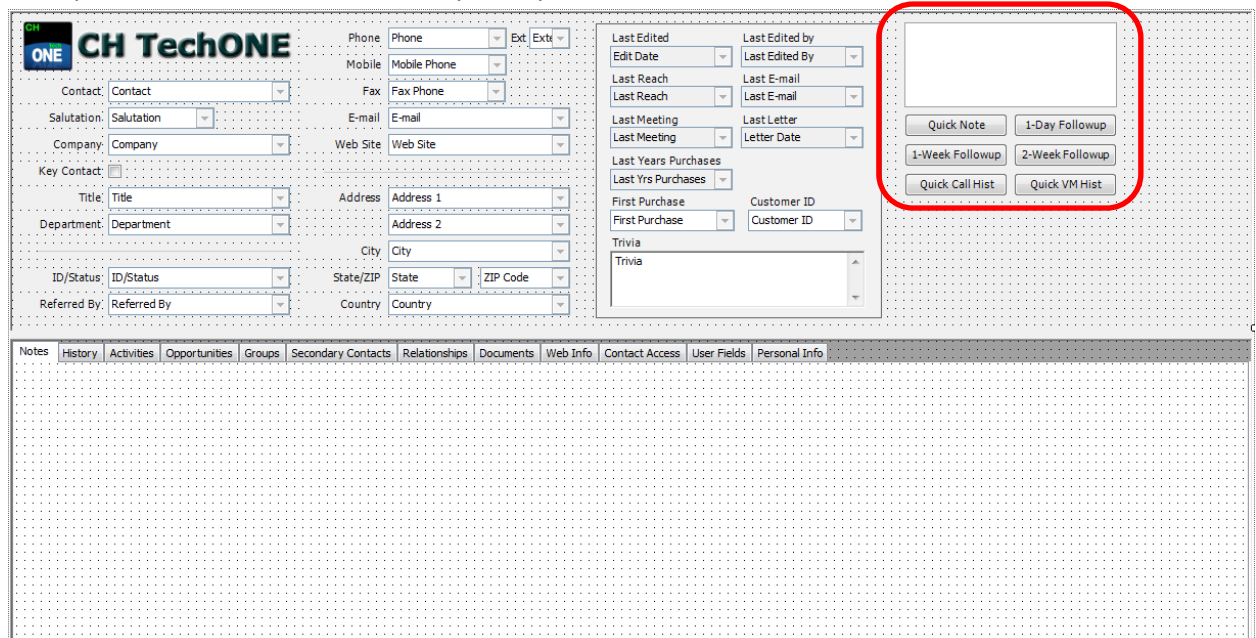


Adding QuickAction buttons to ACT! layouts

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



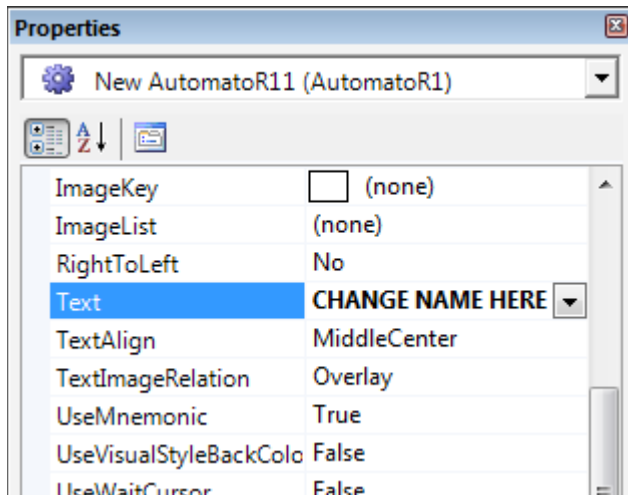
Then place in the desired location on your layout.



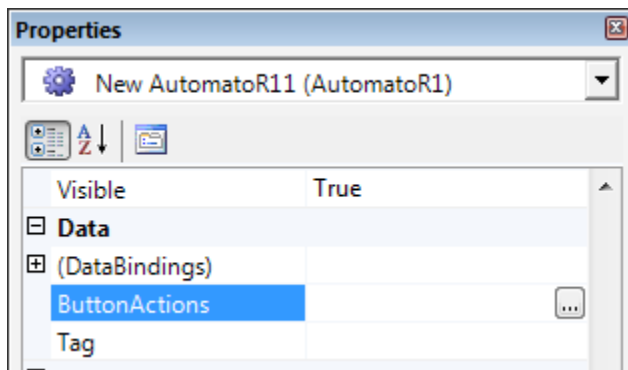
Please note that this can be placed on any layout. QuickActions is not customizable. If you would like to edit the actions you will have to build the custom buttons.

Configuring Automator1 Buttons on ACT! Layouts

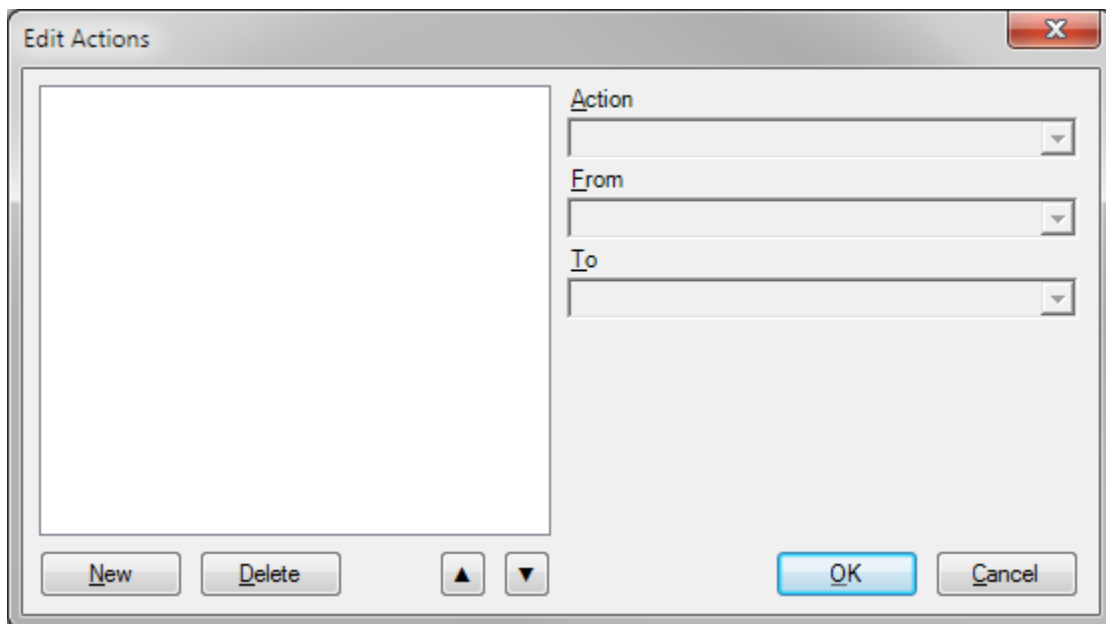
Automator1 buttons use a default naming scheme when first created. This can be changed by adjusting the Text property in the properties window for the button.



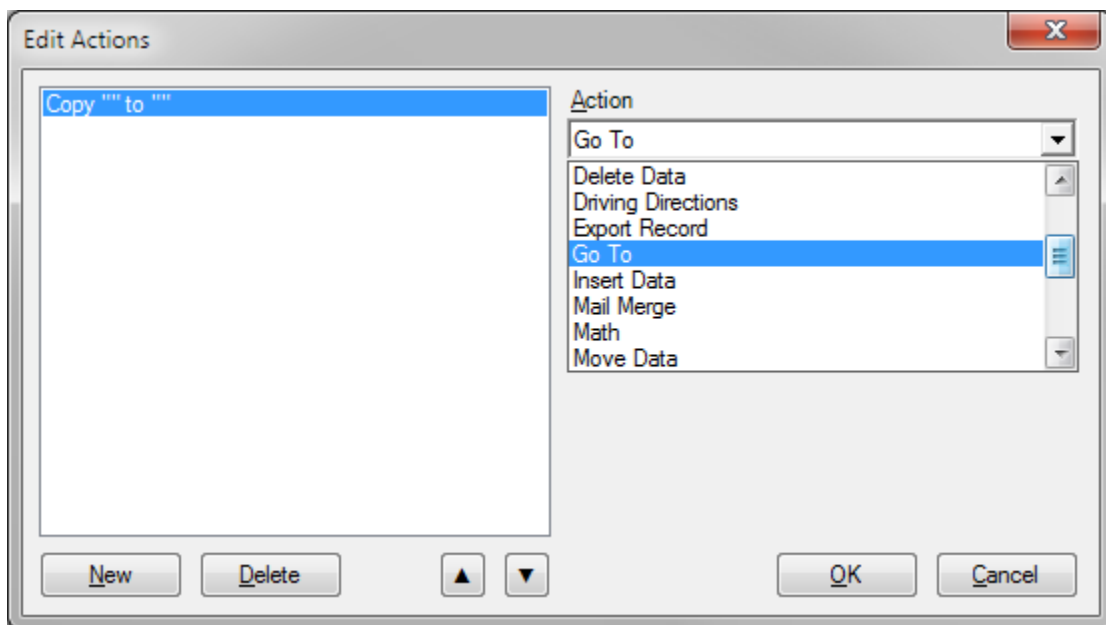
After setting the Automator1 button on the layout and adjusting the name, the button properties can be changed by modifying the ButtonActions property under data in the properties window for the button.



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.

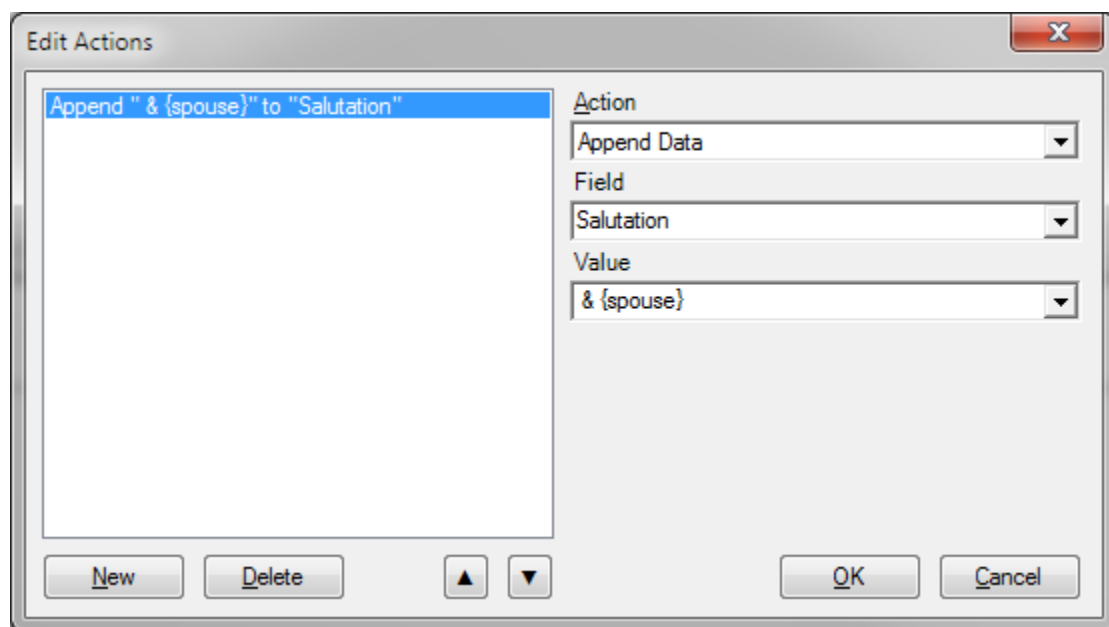
Automator1 Button Actions

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 field 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

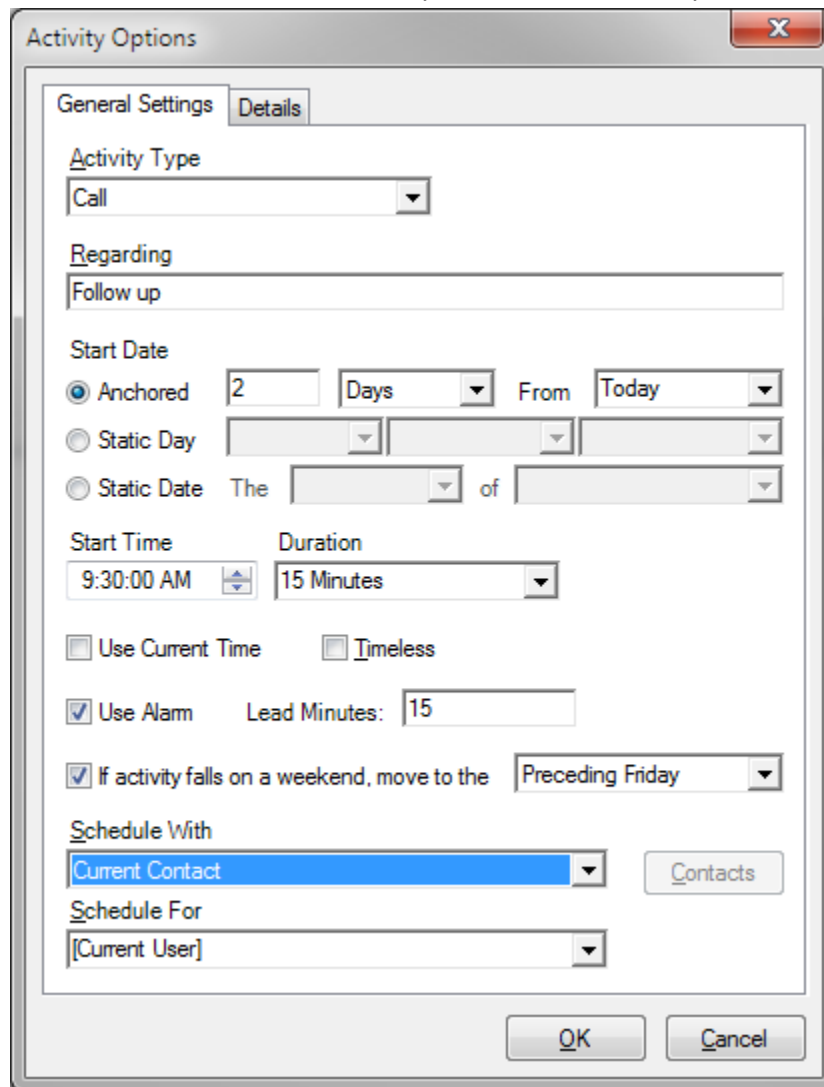
Delete Data

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.



The screenshot shows the 'Activity Options' dialog box with the 'General Settings' tab selected. The settings are as follows:

- Activity Type:** Call (dropdown menu)
- Regarding:** Follow up (text field)
- Start Date:**
 - ☒ Anchored: 2 Days From Today
 - ☐ Static Day
 - ☐ Static Date: The [] of []
- Start Time:** 9:30:00 AM (time picker)
- Duration:** 15 Minutes (dropdown menu)
- ☐ Use Current Time ☐ Timeless
- ☒ Use Alarm: Lead Minutes: 15 (text field)
- ☒ If activity falls on a weekend, move to the: Preceding Friday (dropdown menu)
- Schedule With:** Current Contact (dropdown menu) [Contacts button]
- Schedule For:** [Current User] (dropdown menu)

At the bottom are 'OK' and 'Cancel' buttons.

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.

History Options

Type: To-do Result: To-do Done

Date: Now() Time: Now() Duration: 15 Minutes

Record To: Current Contact Set Query...

Group/Company: None Record Manager: Chris Huffman

Regarding: Invoice Sent

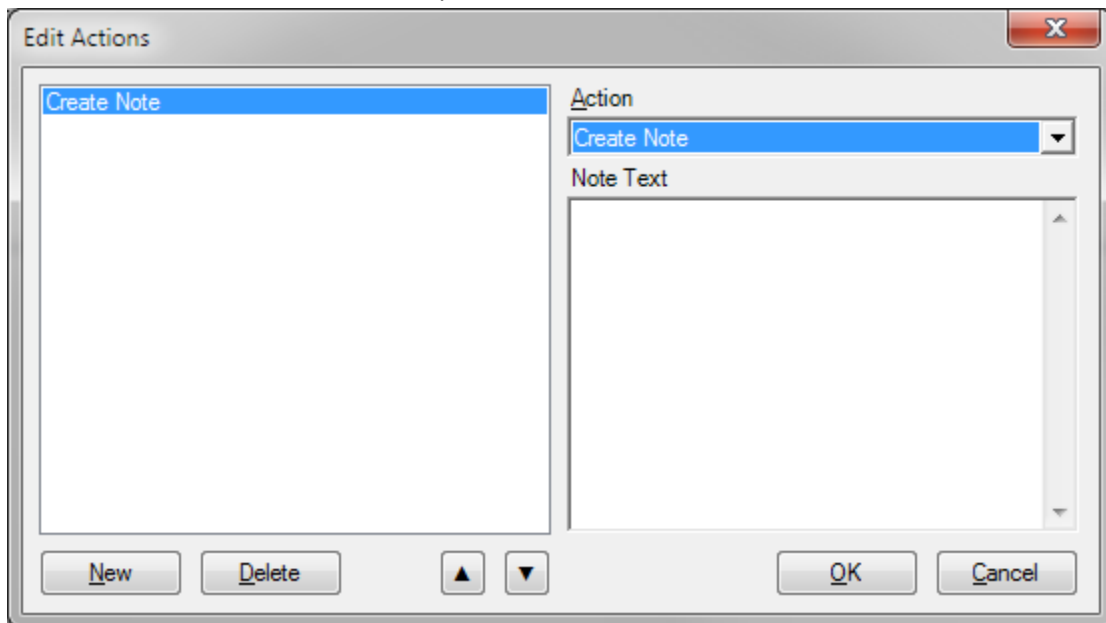
Details:

The invoice for the month of Format("Now", "MMMM") has been sent.

☐ Private OK Cancel

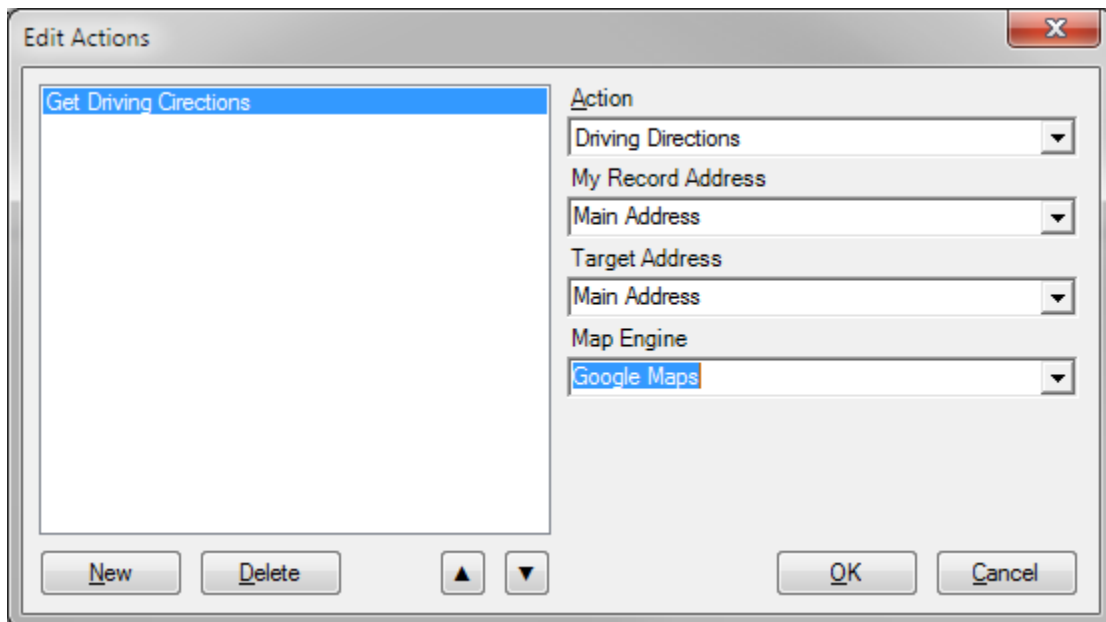
Create Note

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



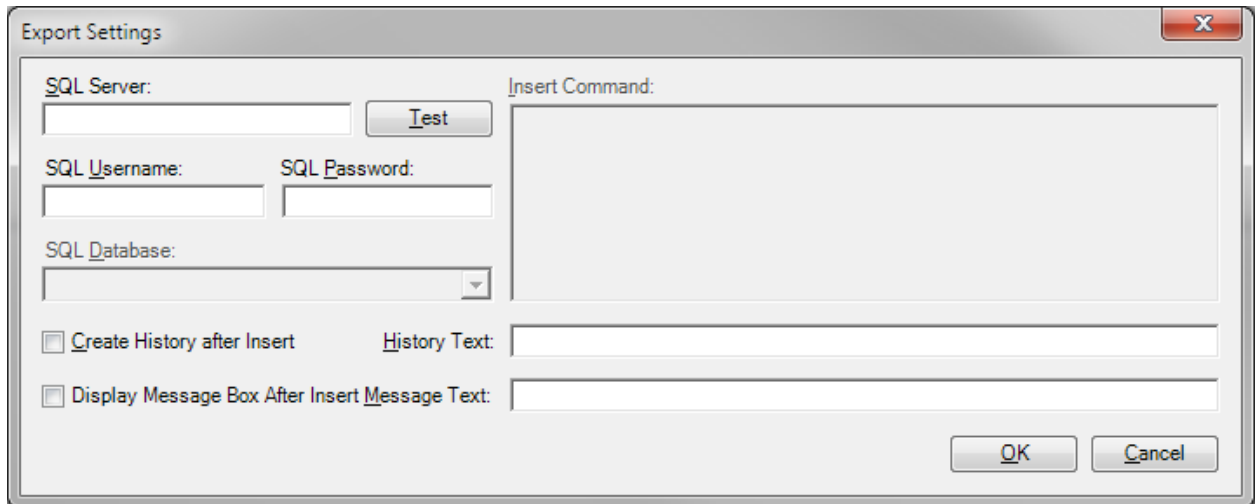
Driving Directions

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.

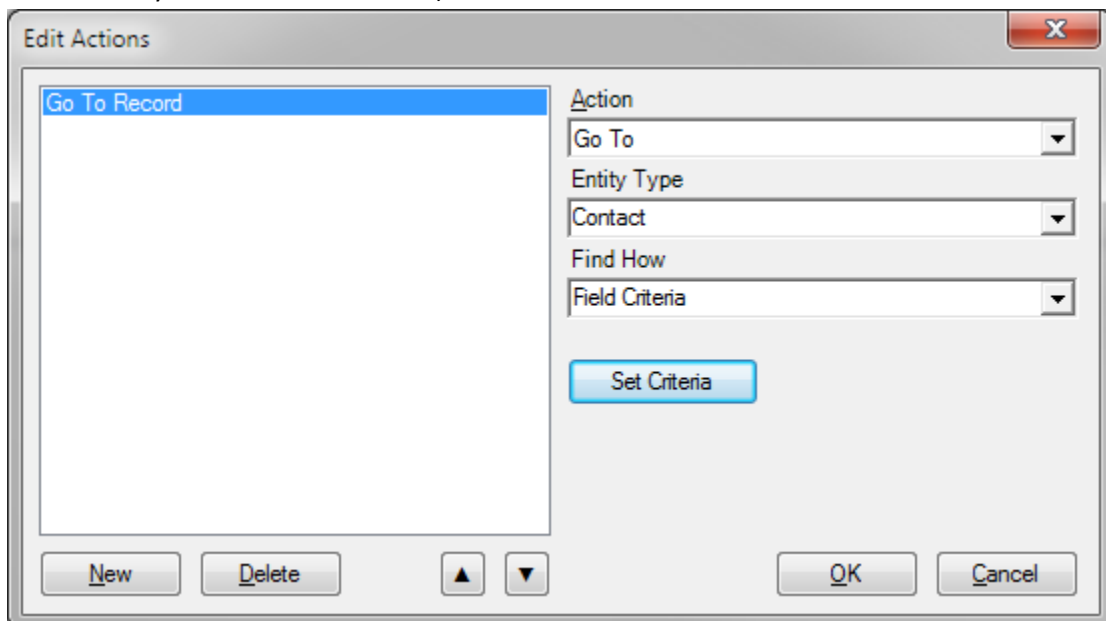


The **Export Settings** dialog box is used to configure the export of a record to a SQL database. It includes the following fields and options:

- SQL Server:** A text input field with a **Test** button next to it.
- SQL Username:** A text input field.
- SQL Password:** A text input field.
- SQL Database:** A dropdown menu.
- Insert Command:** A large text area for entering the SQL insert command.
- ☐ **Create History after Insert**: A checkbox with a **History Text:** input field next to it.
- ☐ **Display Message Box After Insert**: A checkbox with a **Message Text:** input field next to it.
- Buttons:** **OK** and **Cancel** buttons at the bottom right.

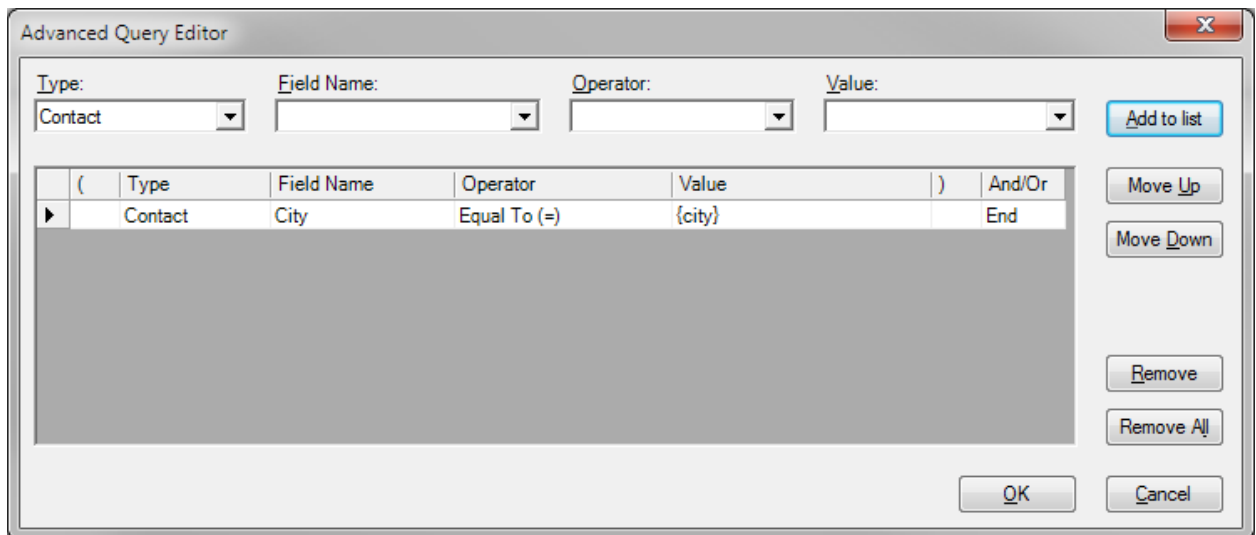
Go To

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).



The **Edit Actions** dialog box is used to configure the **Go To** action. It includes the following fields and options:

- Action List:** A list box on the left containing the **Go To Record** action, which is currently selected.
- Action:** A dropdown menu showing **Go To**.
- Entity Type:** A dropdown menu showing **Contact**.
- Find How:** A dropdown menu showing **Field Criteria**.
- Set Criteria:** A button to configure the search criteria.
- Buttons:** **New**, **Delete**, and arrow buttons at the bottom left; **OK** and **Cancel** buttons at the bottom right.



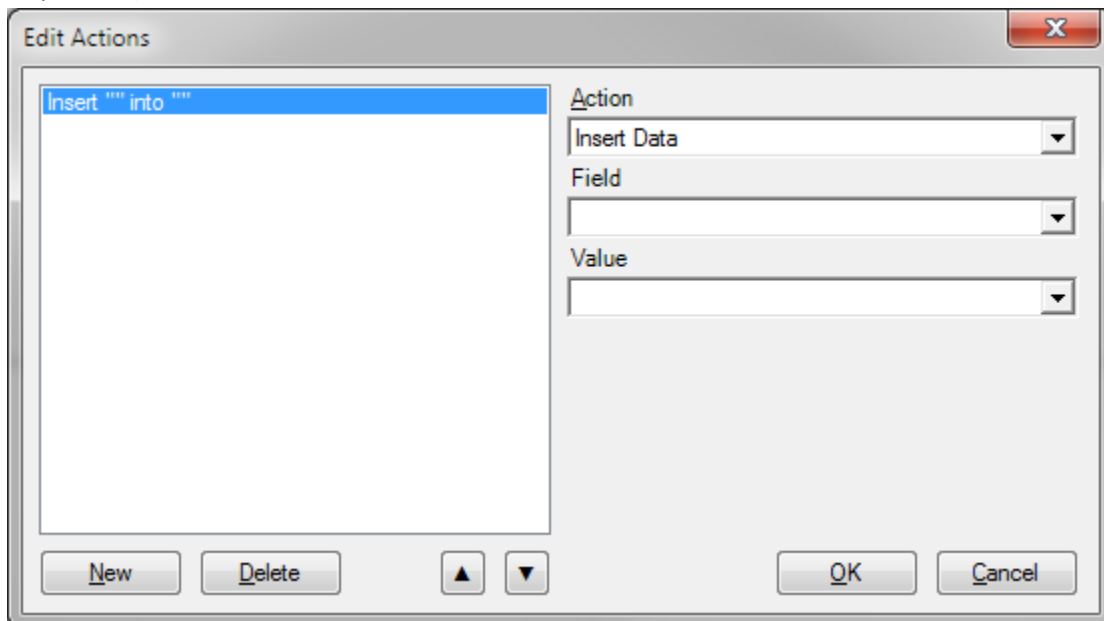
Advanced Query Editor

Type: Field Name: Operator: Value:

	(Type	Field Name	Operator	Value)	And/Or
▶		Contact	City	Equal To (=)	{city}		End

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}”).



Edit Actions

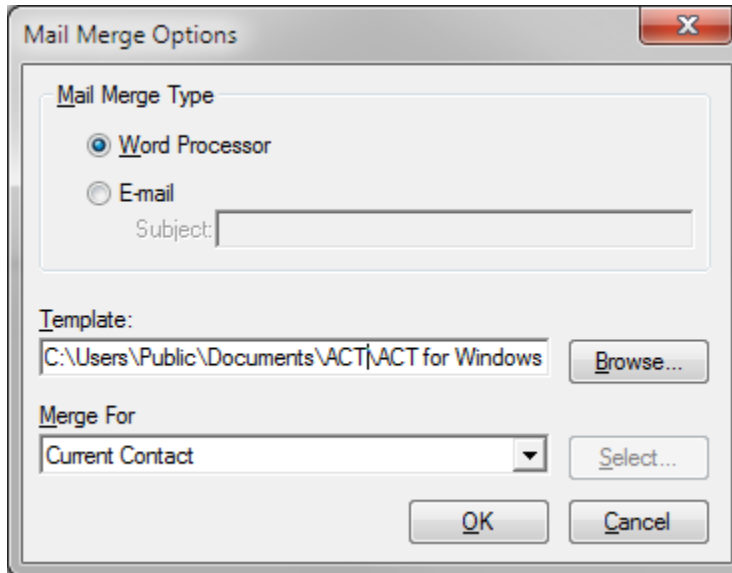
Action:

Field:

Value:

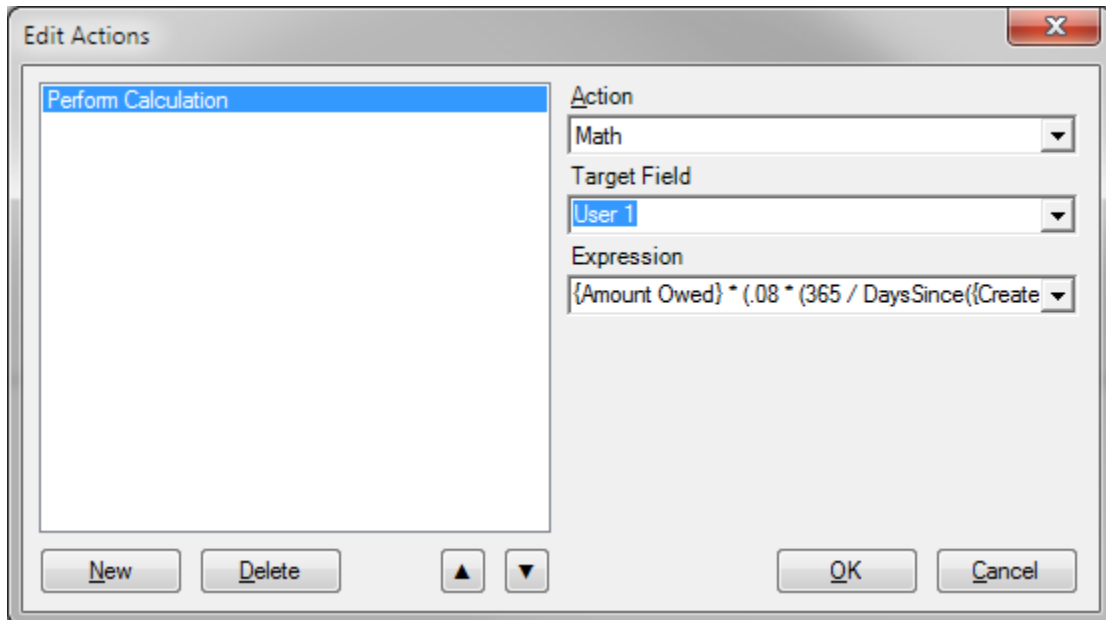
Mail Merge

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.



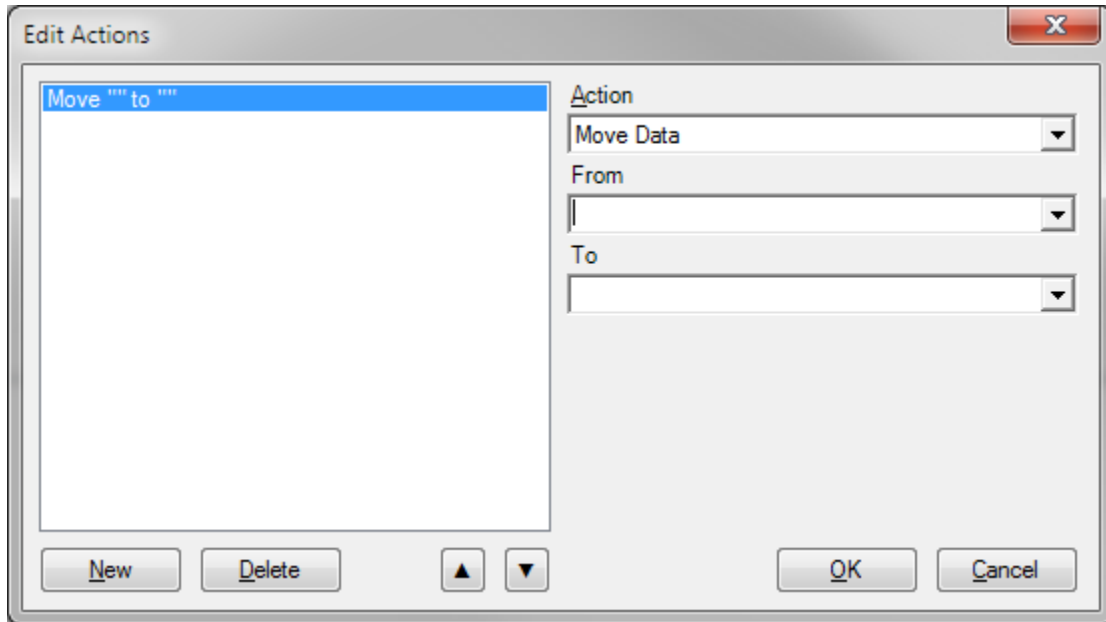
Math

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

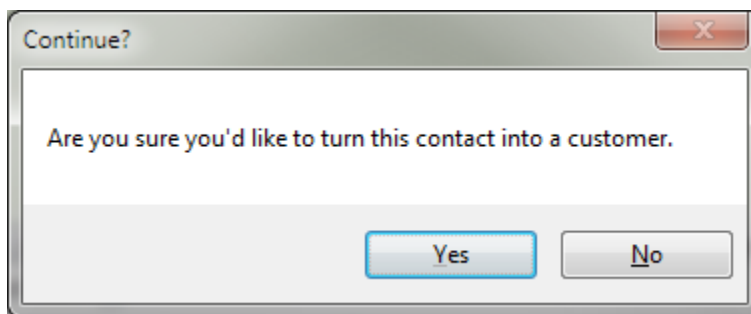
This action will move the data from one specified field to another for the current contact. The data will be removed from the original field.



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.

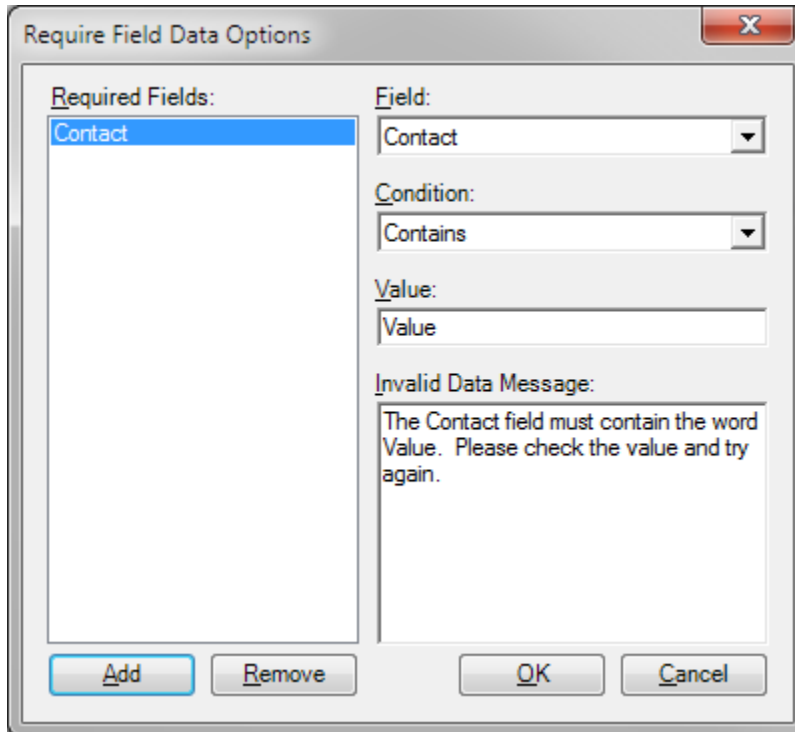


Range Lookup

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

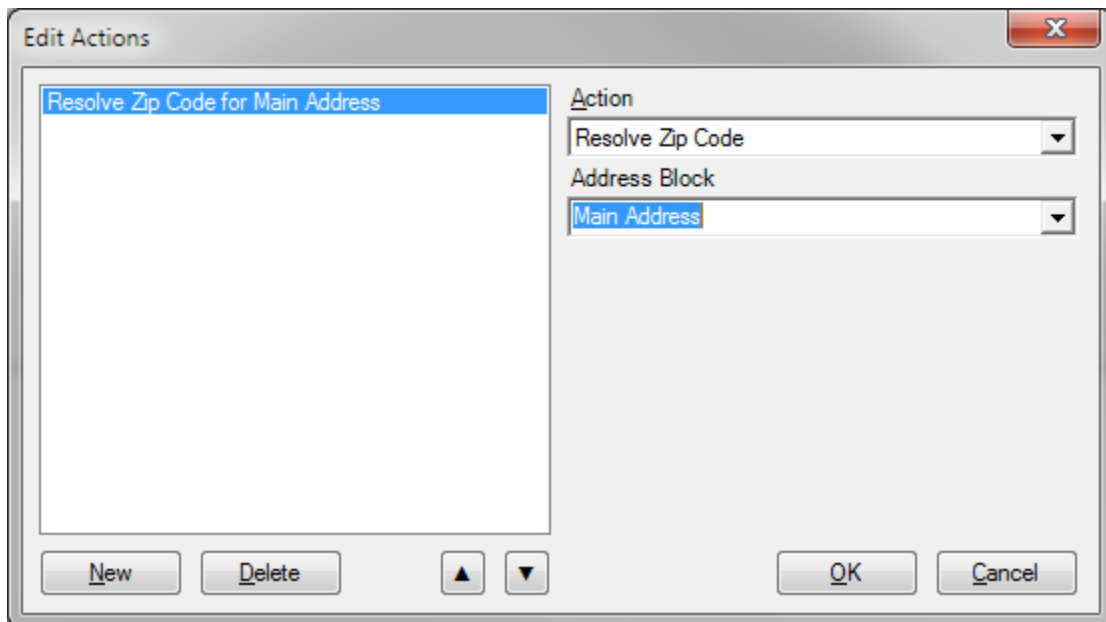
This action will can be placed into a button to make a certain field or set of fields required in order to proceed with the rest of your actions.



The 'Require Field Data Options' dialog box is shown. It has a title bar with a close button (X). The dialog is divided into two main sections. On the left, under 'Required Fields:', there is a list box containing the word 'Contact'. On the right, there are four labeled fields: 'Field:' with a dropdown menu showing 'Contact', 'Condition:' with a dropdown menu showing 'Contains', 'Value:' with a text input field containing 'Value', and 'Invalid Data Message:' with a text area containing the message 'The Contact field must contain the word Value. Please check the value and try again.' At the bottom of the dialog, there are four buttons: 'Add', 'Remove', 'OK', and 'Cancel'.

Resolve Zip Code

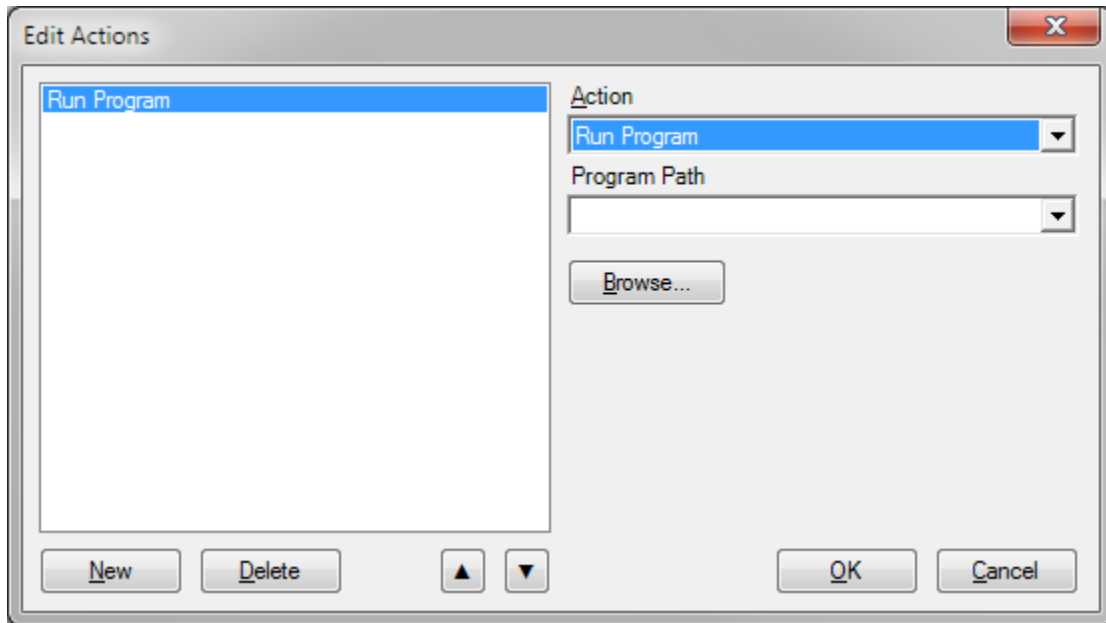
This action will resolve the Zip+4 for the current contact from the specified address block (main or home).



The 'Edit Actions' dialog box is shown. It has a title bar with a close button (X). The dialog is divided into two main sections. On the left, there is a list box containing the action 'Resolve Zip Code for Main Address'. On the right, there are two labeled dropdown menus: 'Action' with 'Resolve Zip Code' selected, and 'Address Block' with 'Main Address' selected. At the bottom of the dialog, there are four buttons: 'New', 'Delete', and two arrow buttons (up and down), followed by 'OK' and 'Cancel'.

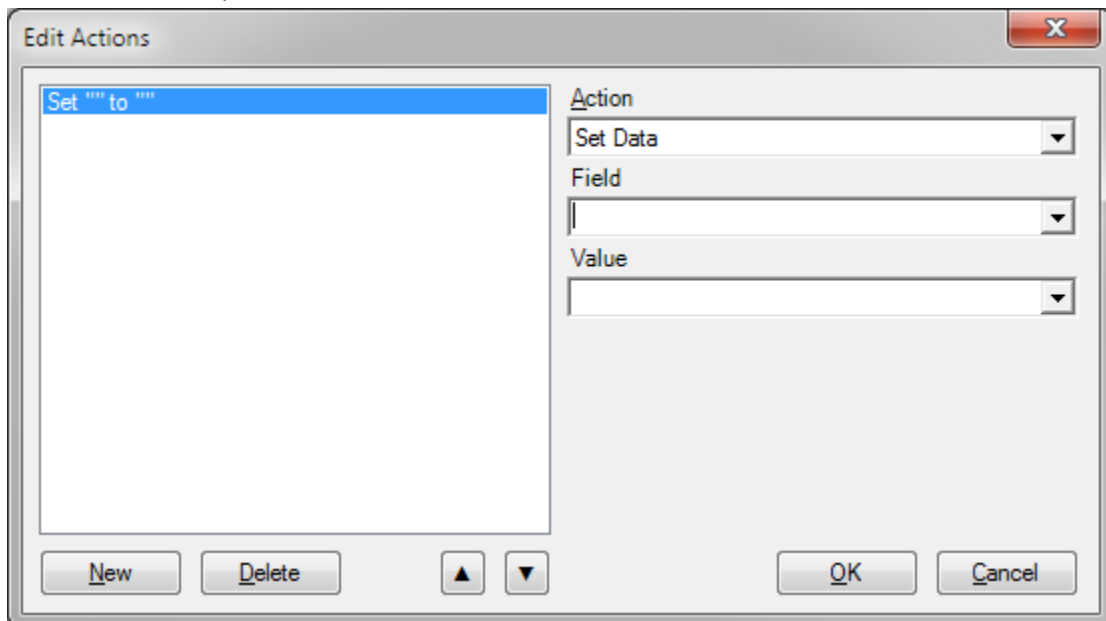
Run Program

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}").

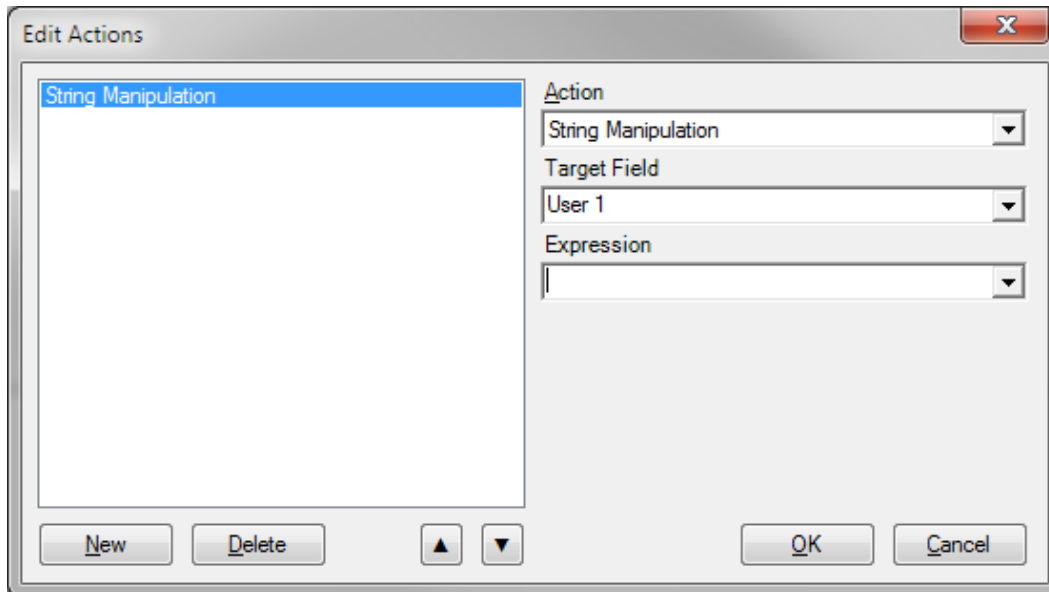


Set Source Record

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.

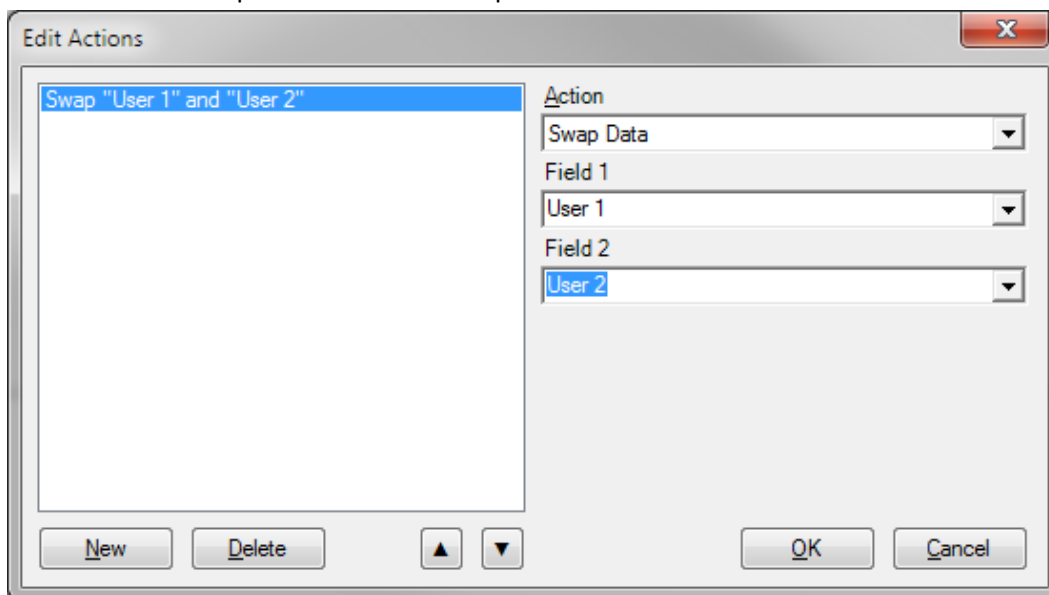
String Manipulation

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