



## **Automator4Act**

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# **Automator4Act**

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# 1 Automator4Act

## 1.1 Welcome



**Automator4act performs calculations, mail merges, creates notes or histories, and a whole lot more!**

Think of it as Macros for your Act! database. Automator4act is designed to make repetitive tasks simple, quick, and error-free.

- Specify Buttons for particular task
- Perform multiple tasks with a single button
- Make tasks conditional with if/then statements
- Reference fields in the database within your actions
- Create lookups using data from current contact
- Mail Merge HTML documents
- Perform complex mathematical equations

**Example:**

A common button created is the “New Contact” button. After putting the vital info that cannot be automated such as Contact name, phone number, email address, etc. A push of this button will create a history regarding the creation of the contact, creates a company, sets field data like ID/status and record manager or sales rep, creates activities for follow ups, and does an email merge welcome email.

**System Requirements**

- Computer with a Pentium IV or better processor.
- Microsoft Windows 10, 11 (32bit and 64bit versions)
- Act! v21+

## 1.2 Installing

### 1.2.1 Installing

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

Automator4Act requires a minimum Act! version of 19 and supports 32 and 64 bit versions of Act!.

Automator4Act requires that all system requirements for Act! be met on the system.

These requirements are determined by your version of Act!.

Please refer to the Act! System Requirements documentation for the version you are using to verify compatibility.

To install, simply run the Automator4Act\_Installer.exe. The installer will place the necessary files into the Act! Tools folder.

There are no files to install into the standard Program Files folders.

## 1.3 Act! Setup

### 1.3.1 Where to find Automator4Act inside of Act!

Automator4Act is a custom tool for your Act! layout. It can only be found by editing your layouts. Contact, company, group and opportunity layouts are all supported.

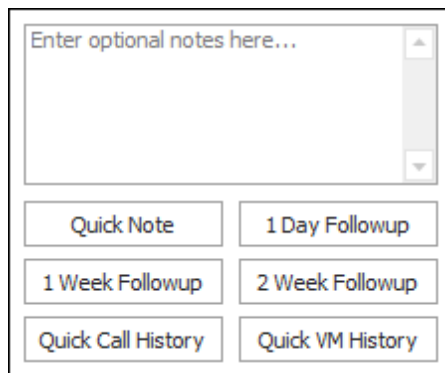
There are 2 types of controls. The Automator4Act button which allows the user to select various, pre-defined functions and the QuickAction control.

The Automator4Act button will appear as a standard button in Act and can be modified with various properties, similar to that of other Act! layout controls.

The QuickAction control is a composite of 6 different buttons, or "quick actions."

These allow the user to quickly enter a Note; Schedule follow-ups in 1 Day, 1 Week or 2 Week intervals; or create a Call History or Voicemail History.

Notes are optional, but should be used for a Quick Note, otherwise your note will be empty. Notes for Follow-ups and Histories will appear in the details section of the call or history.



The image shows a screenshot of a software interface. At the top is a text area with the placeholder text "Enter optional notes here..." and a vertical scrollbar on the right. Below this text area is a grid of six buttons arranged in three rows and two columns. The buttons are labeled: "Quick Note", "1 Day Followup", "1 Week Followup", "2 Week Followup", "Quick Call History", and "Quick VM History".

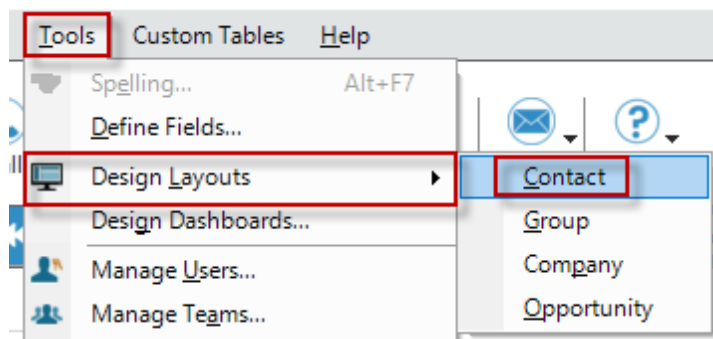
To add a button, go to the Adding an Automator4Act button.

To add a QuickAction control, go to the Adding the QuickActions control.

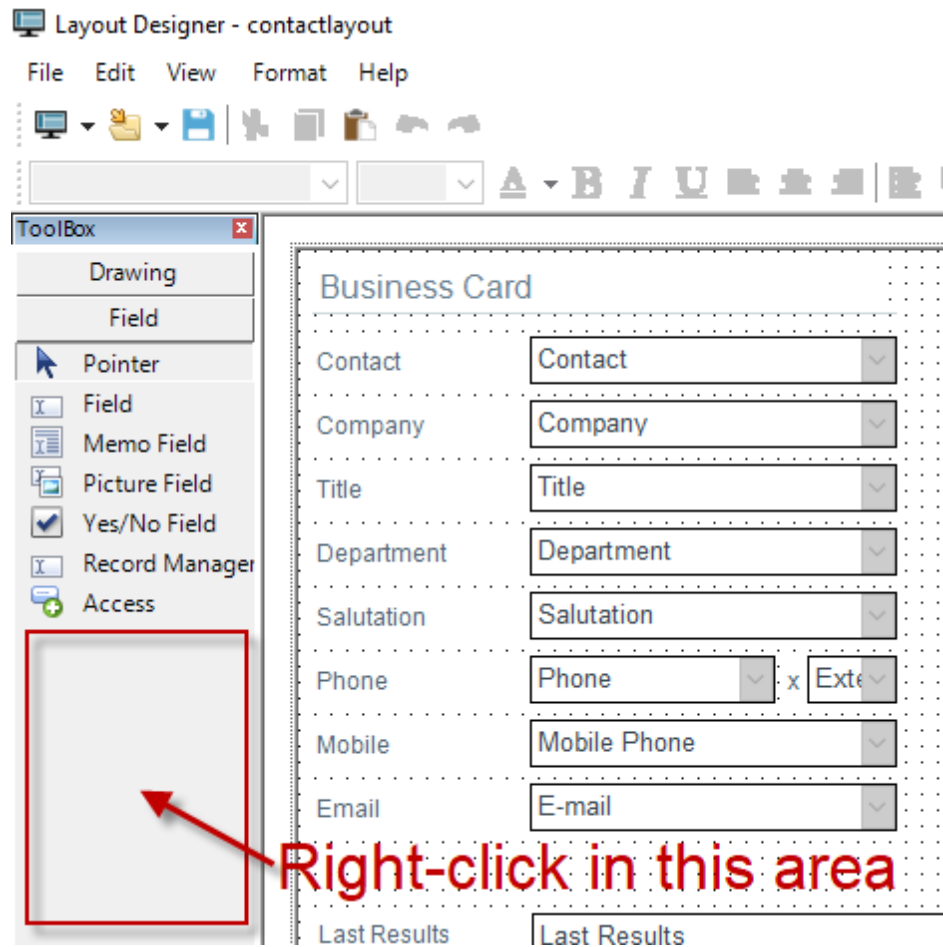
### 1.3.2 Adding an Automator4Act Button

1. In Act!, go to **Tools, Design Layouts** and select the layout type you would like to modify.

Here, the Contact Layout is being selected:

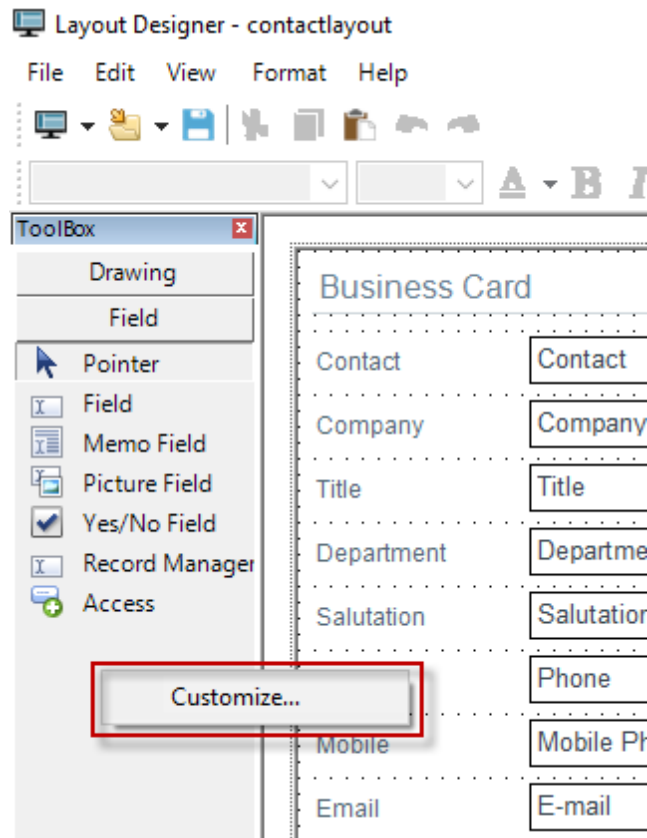


2. In the layout designer, right-click in the **Toolbox** window in a blank area.

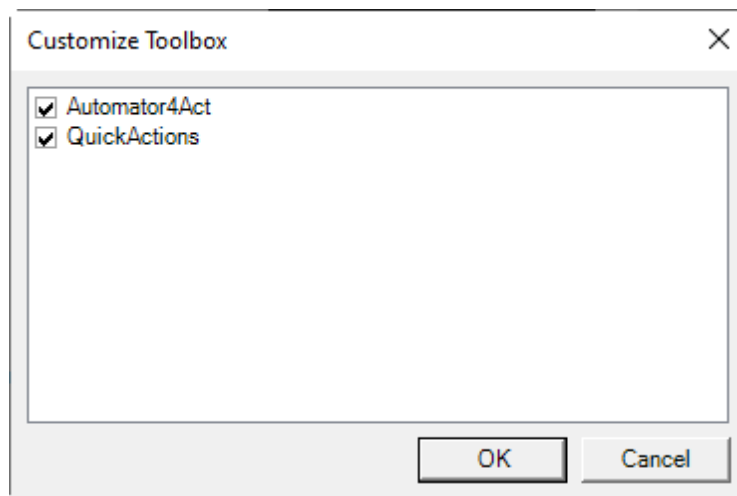


3. In the right-click popup menu, select **Customize**

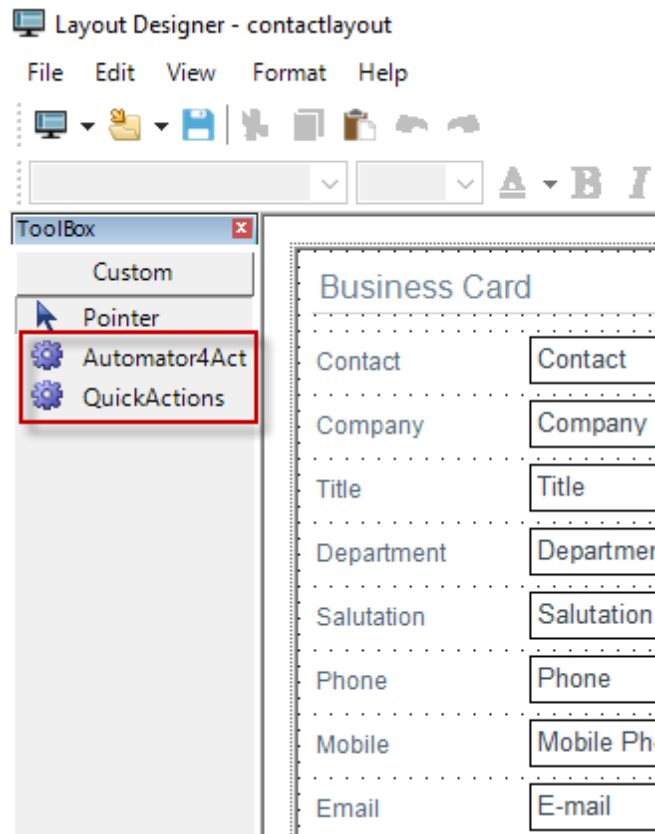




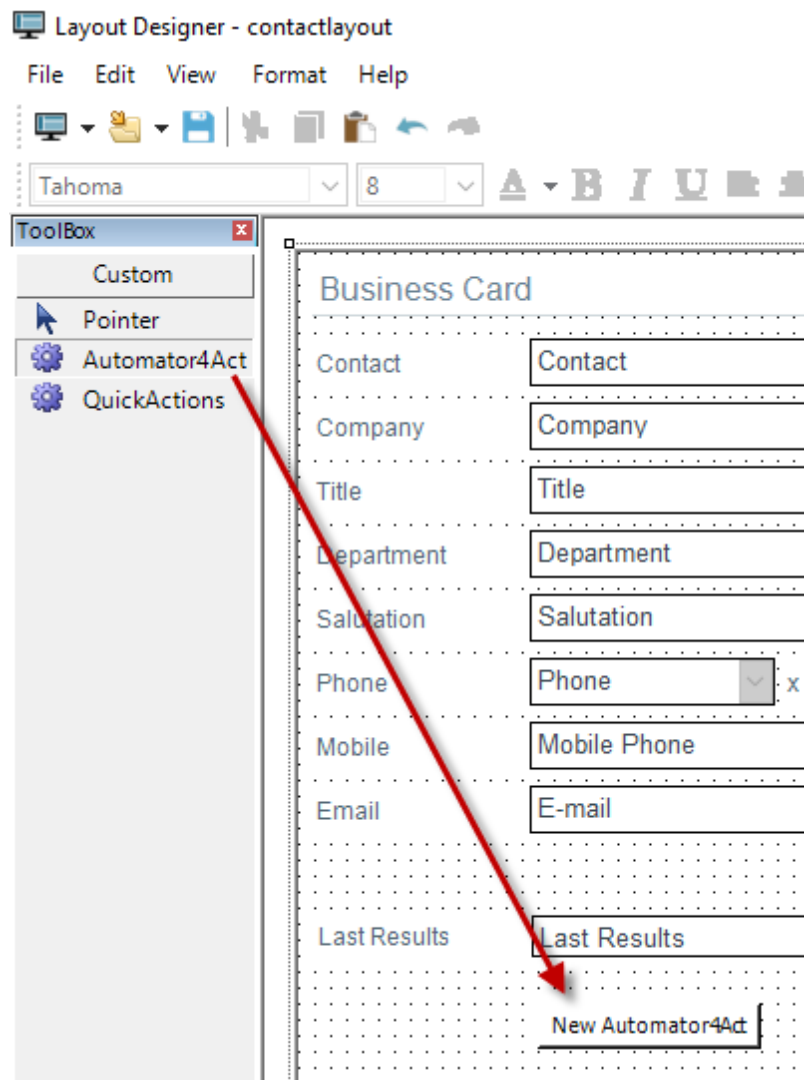
4. In the Customize Dialog box, select **Automator4Act** and **QuickActions**, then click OK.



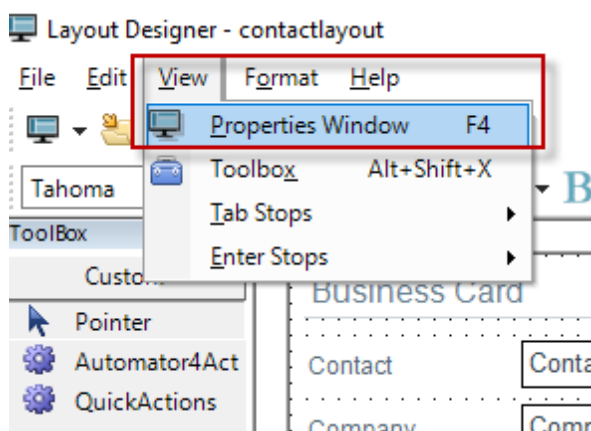
5. The Toolbox window will now contain the two, custom controls for Automator4Act as shown below.



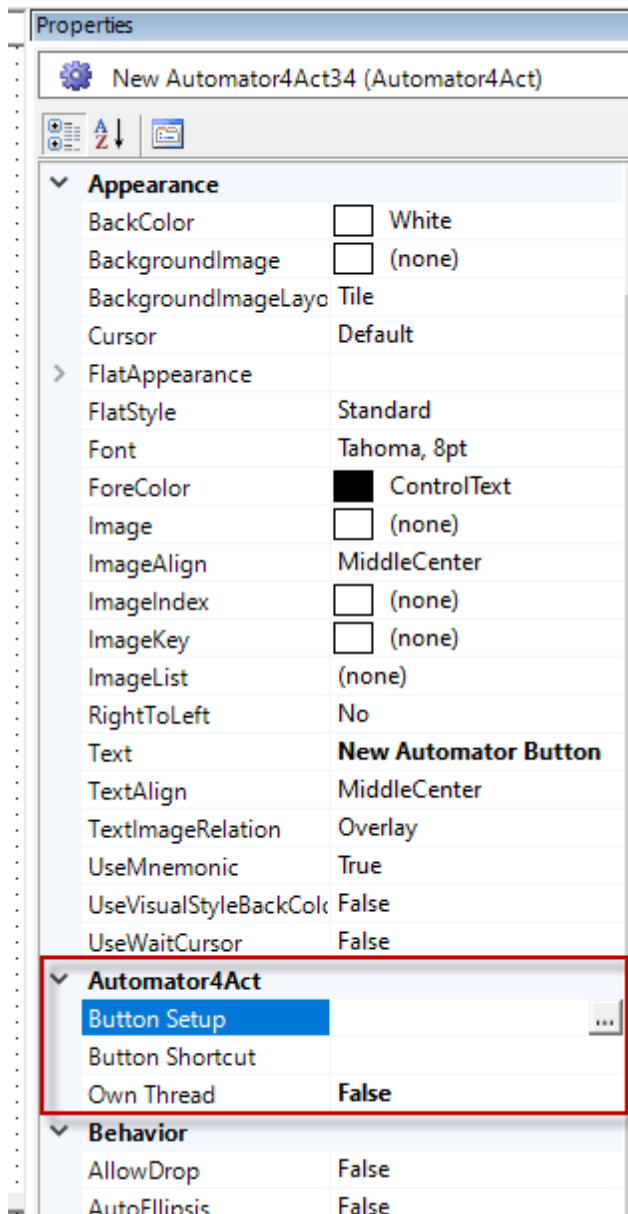
6. To add a normal Automator4Act button, click the Automator4Act option, then draw on your layout the size button you would like.



7. After adding your button, you'll need to set the properties for the button. Click on View, Properties in the Layout Editor.



8. In the Properties window, look for the Automator4Act section. Click the Button Setup line, a button will appear.

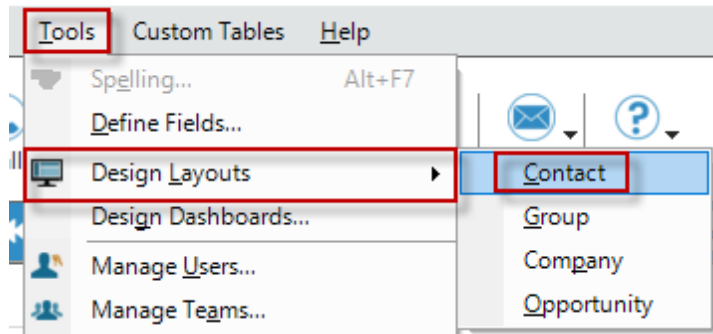


9. See the Edit Actions section to continue setting up your button.

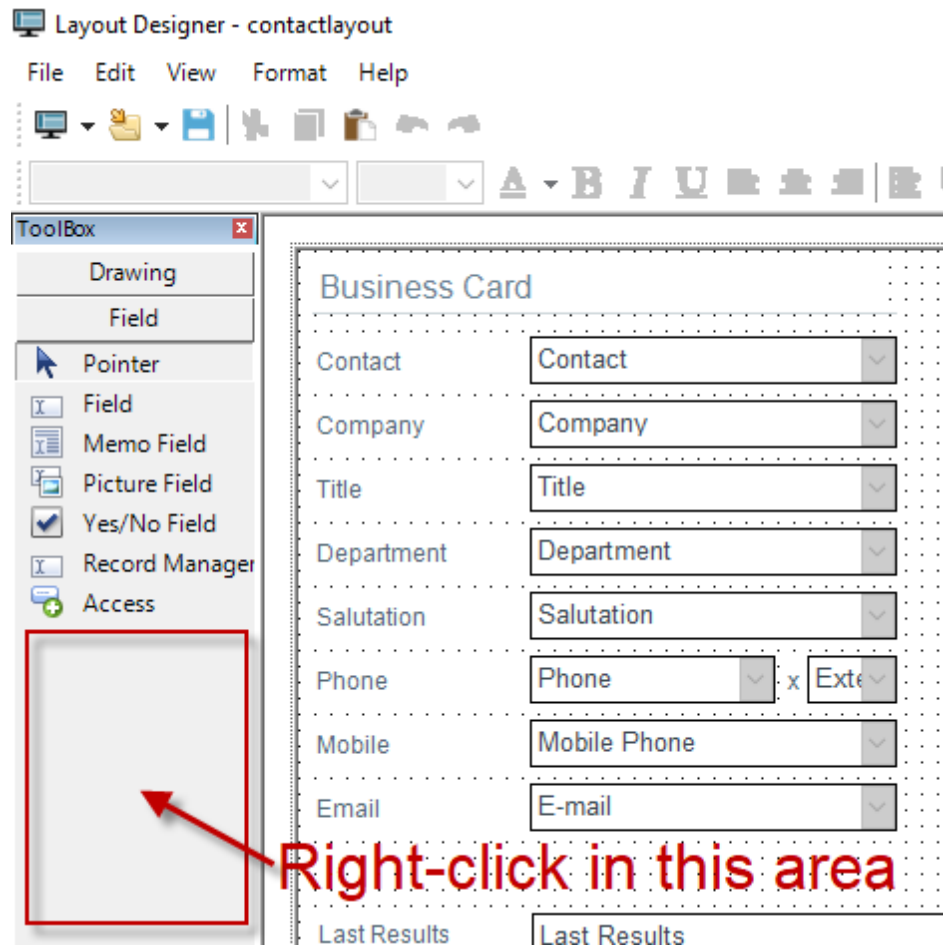
### 1.3.3 Adding the QuickActions control

1. In Act!, go to **Tools**, **Design Layouts** and select the layout type you would like to modify.

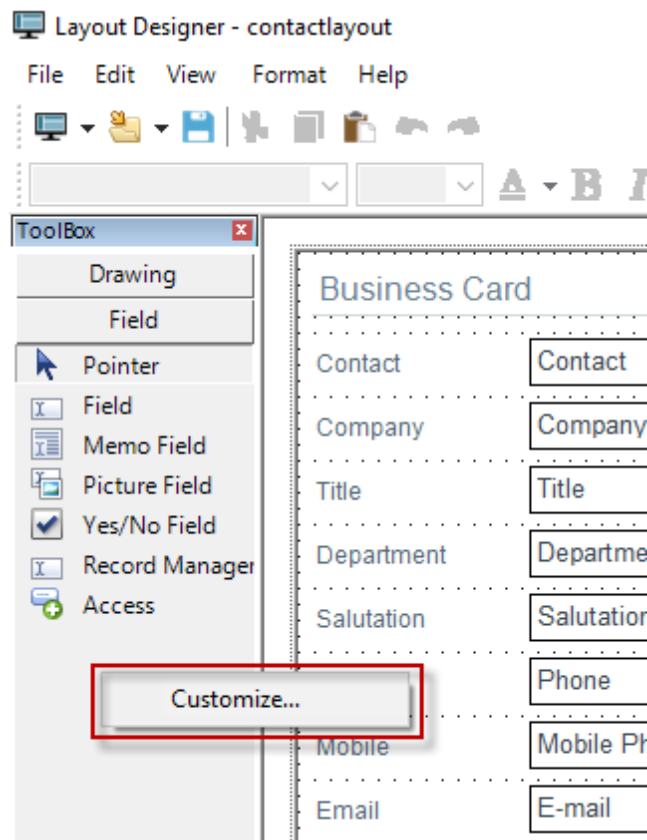
Here, the Contact Layout is being selected:



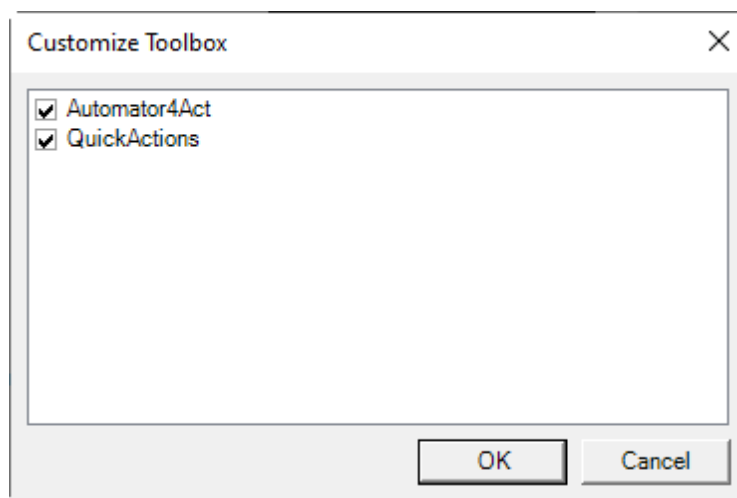
2. In the layout designer, right-click in the **Toolbox** window in a blank area.



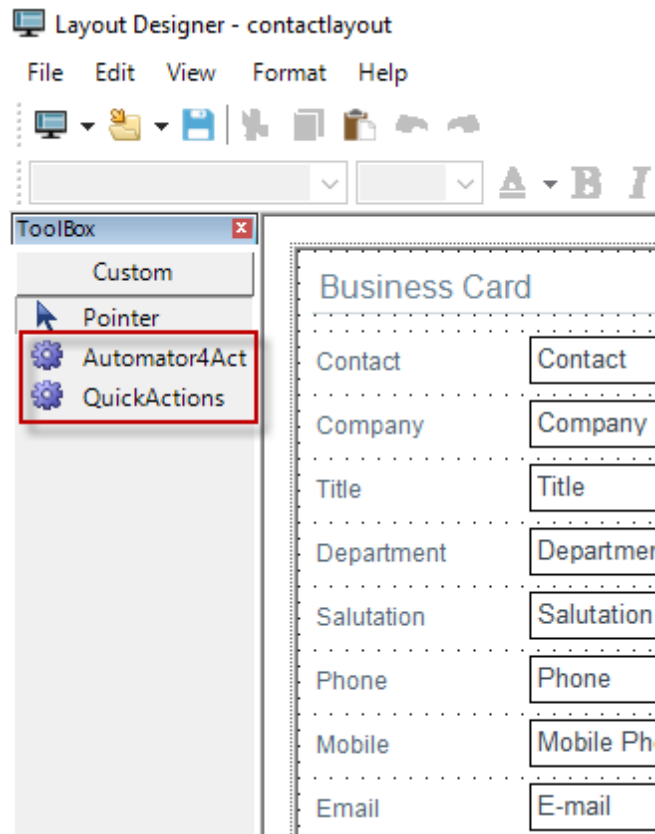
3. In the right-click popup menu, select **Customize**



4. In the Customize Dialog box, select **Automator4Act** and **QuickActions**, then click OK.

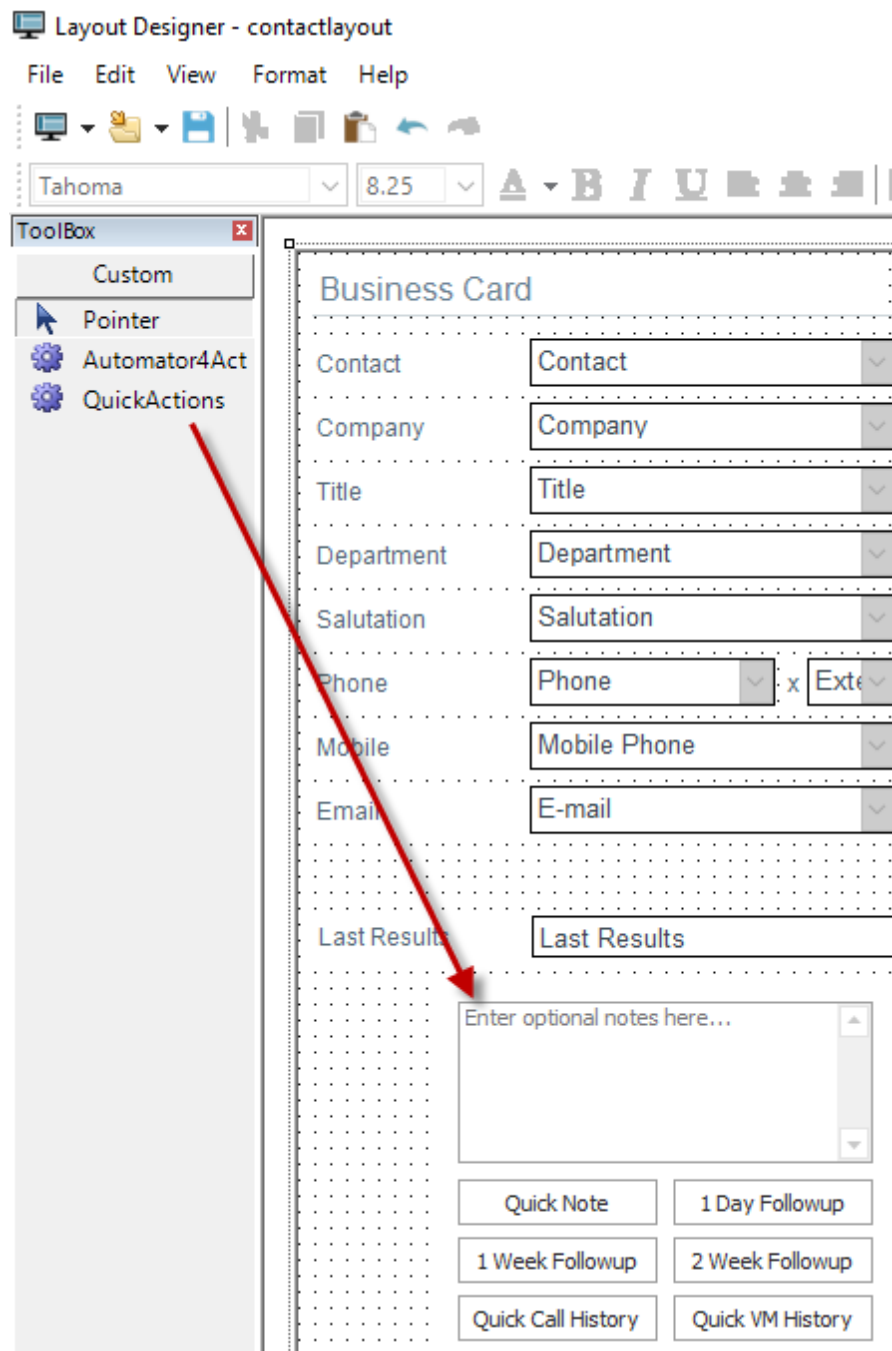


5. The Toolbox window will now contain the two, custom controls for Automator4Act as shown below.



6. To add a normal Automator4Act button, click the QuickActions option, then draw on your layout the size control you would like.



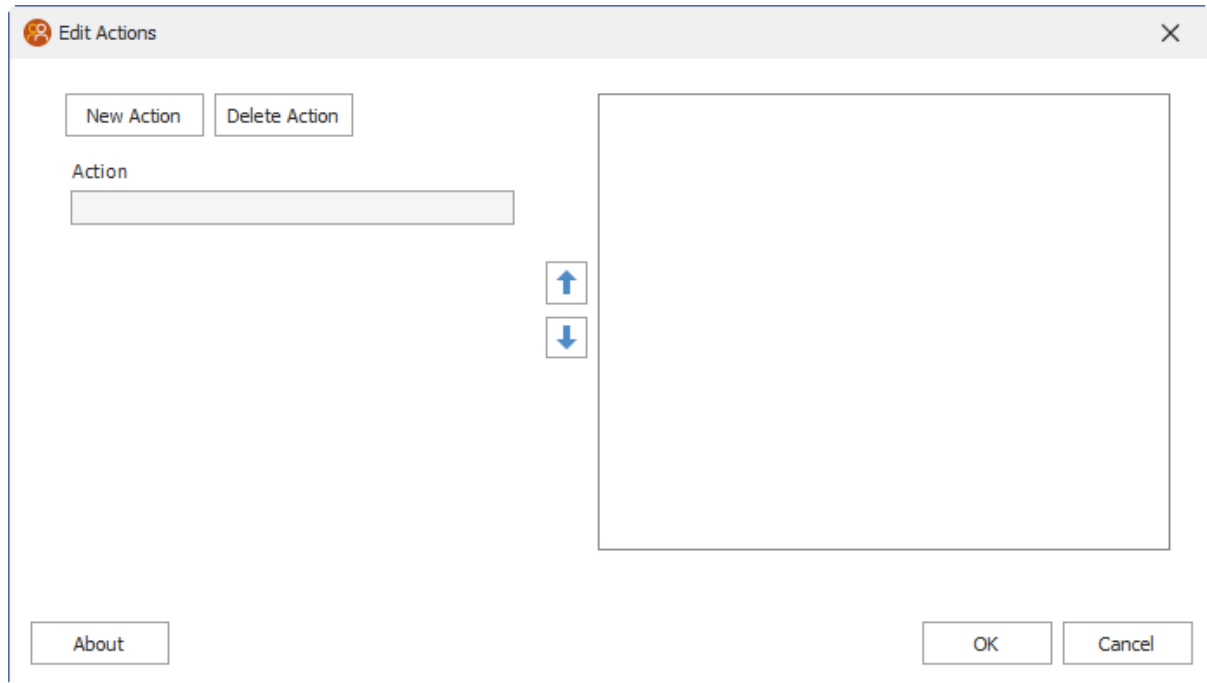


7. The QuickActions control does not have any additional setup need.
8. Save the layout and close the layout editor to being using the QuickActions control.

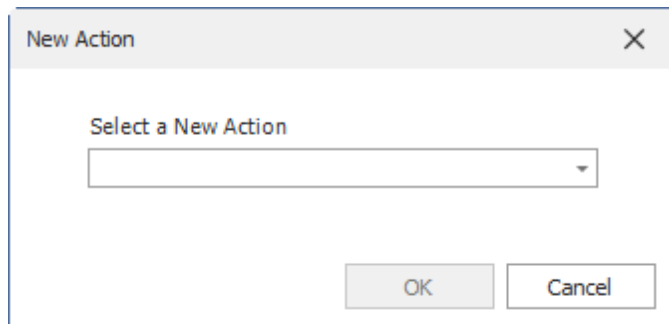
## 1.4 Edit Actions

### 1.4.1 Edit Actions Dialog

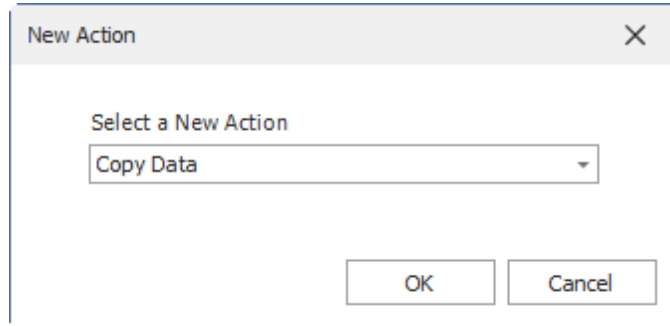
The Edit Actions screen will appear blank after clicking the Button Setup for a newly added button.



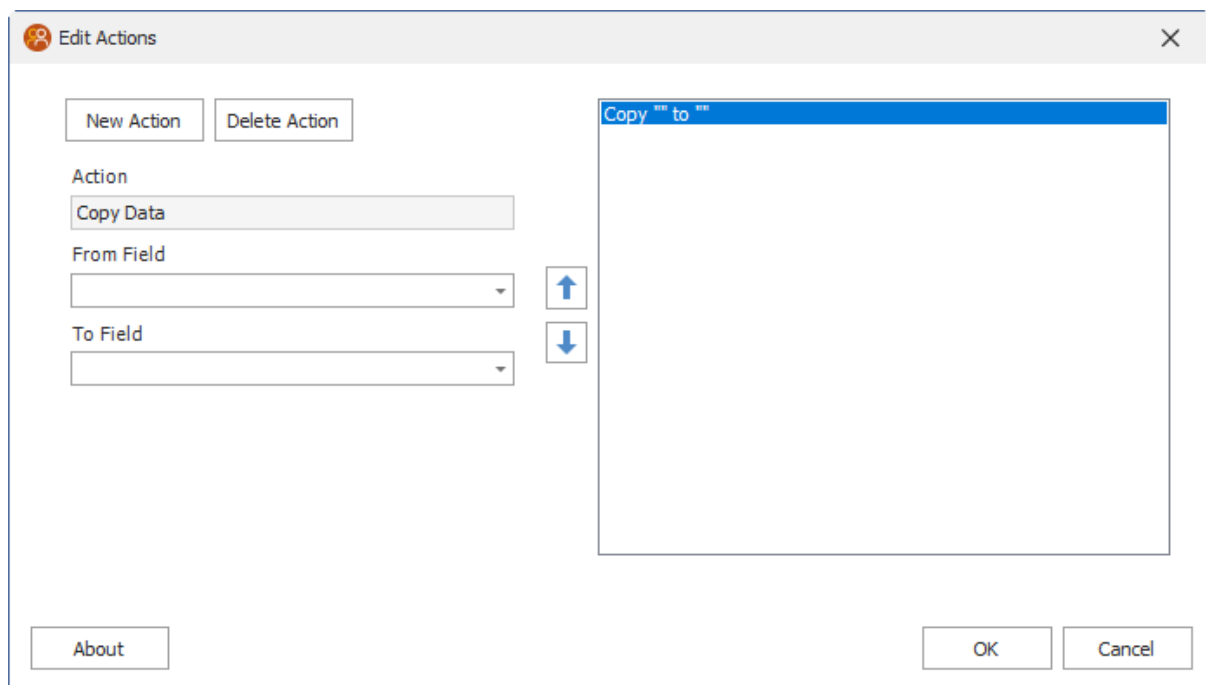
1. To add an action to the button, click the **New Action** button and you'll see the New Action dialog.



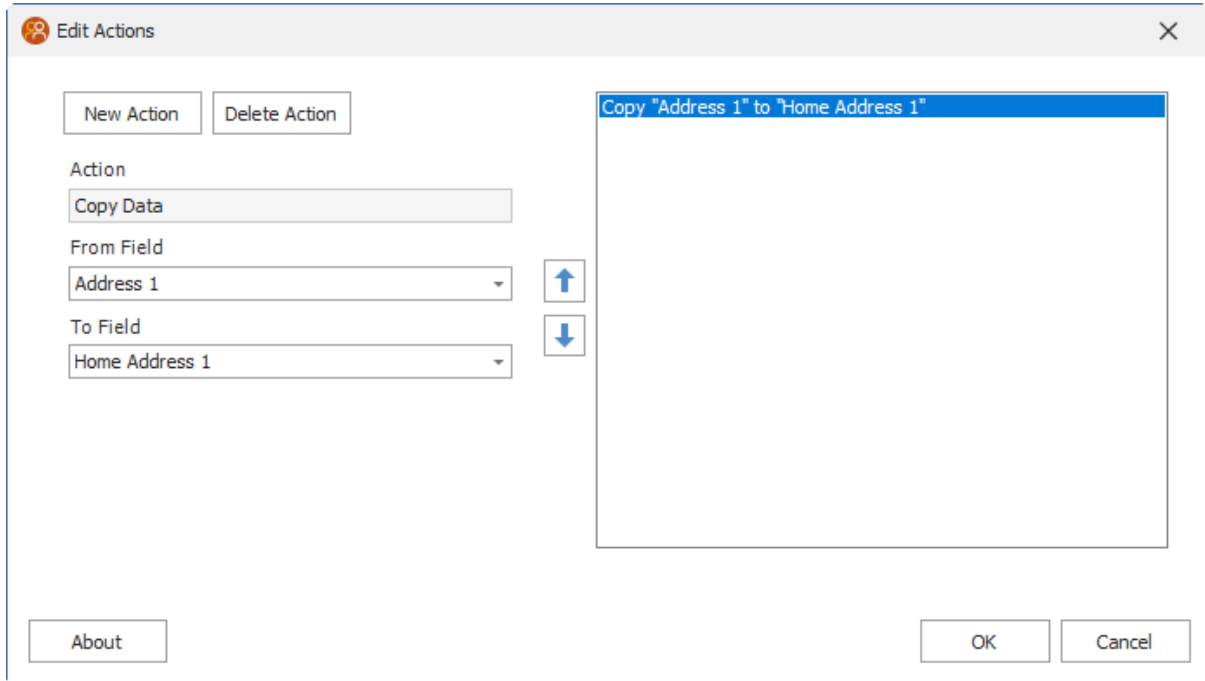
2. From the drop-down, select your action. The below example uses the "Copy Data" action.



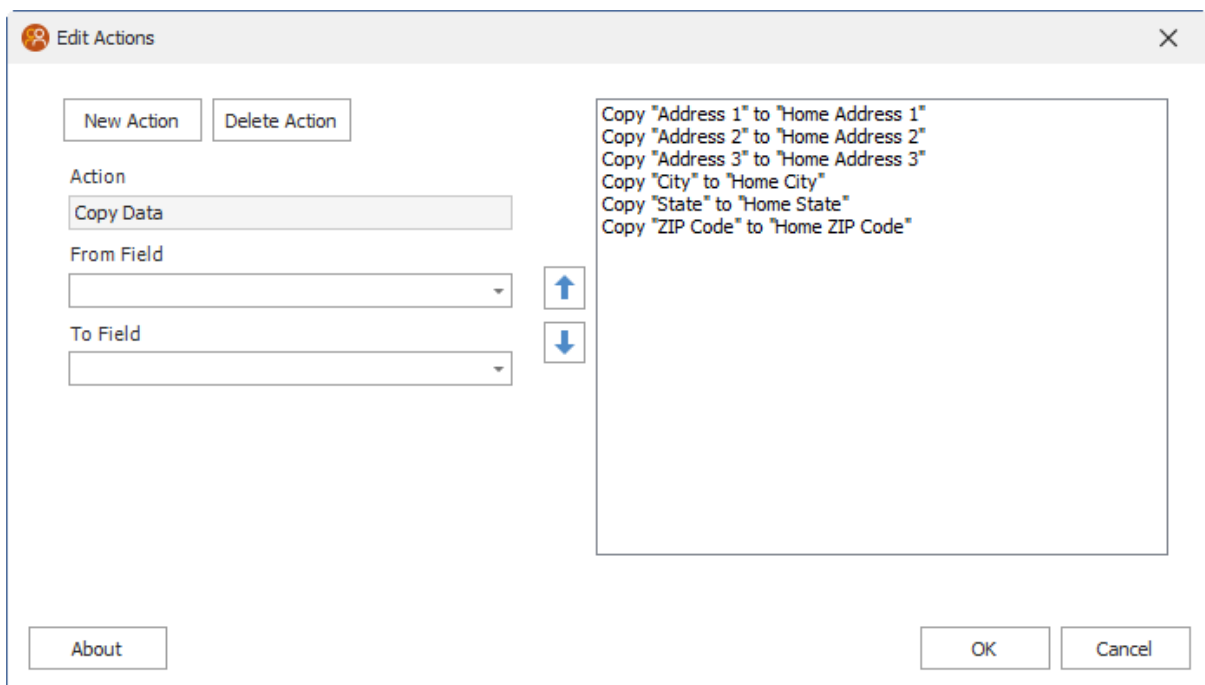
3. Click OK after selecting your action. The Edit Actions dialog will now reappear with various options shown. Below is showing the Copy Data action.



4. Below shows an example of using the Copy Data function to copy from "Address 1" to "Home Address 1."



5. Click OK to save your action, or click the New Action button again to add more actions to this button.
6. As an example of multiple actions, below shows copying all Primary Address fields to their respective Home Address fields.

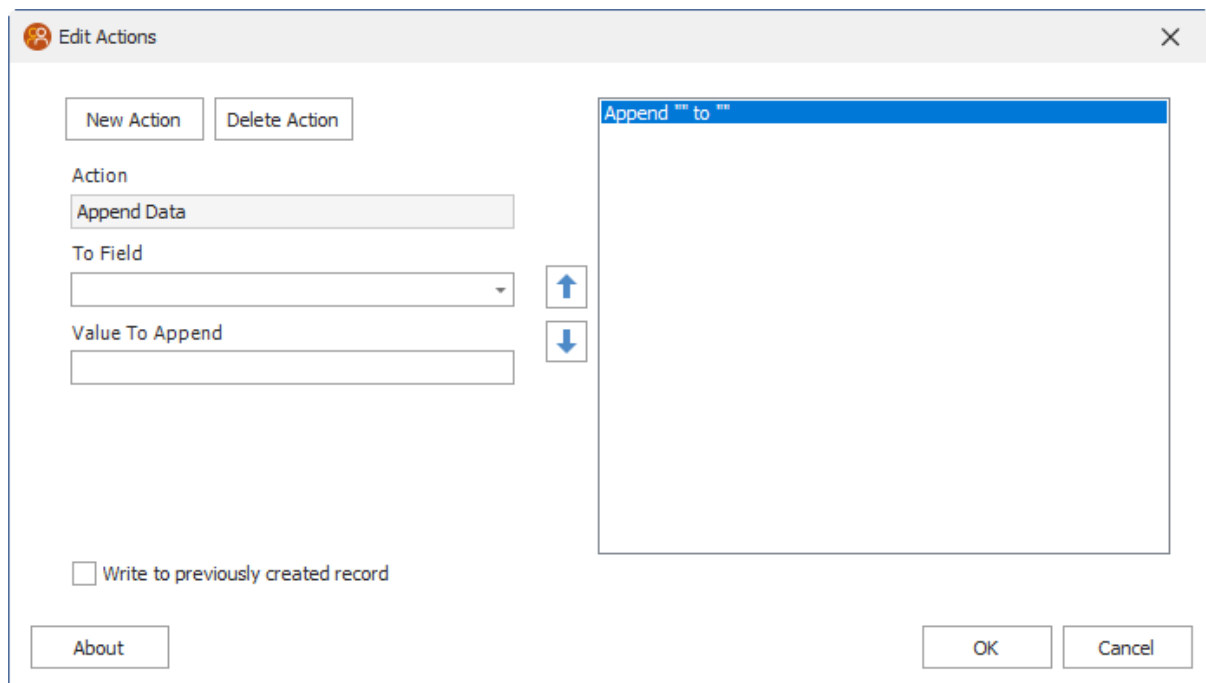


7. After specifying one or more actions, click the OK button, then save your layout and being using your new button.

## 1.5 Actions

### 1.5.1 Append Data

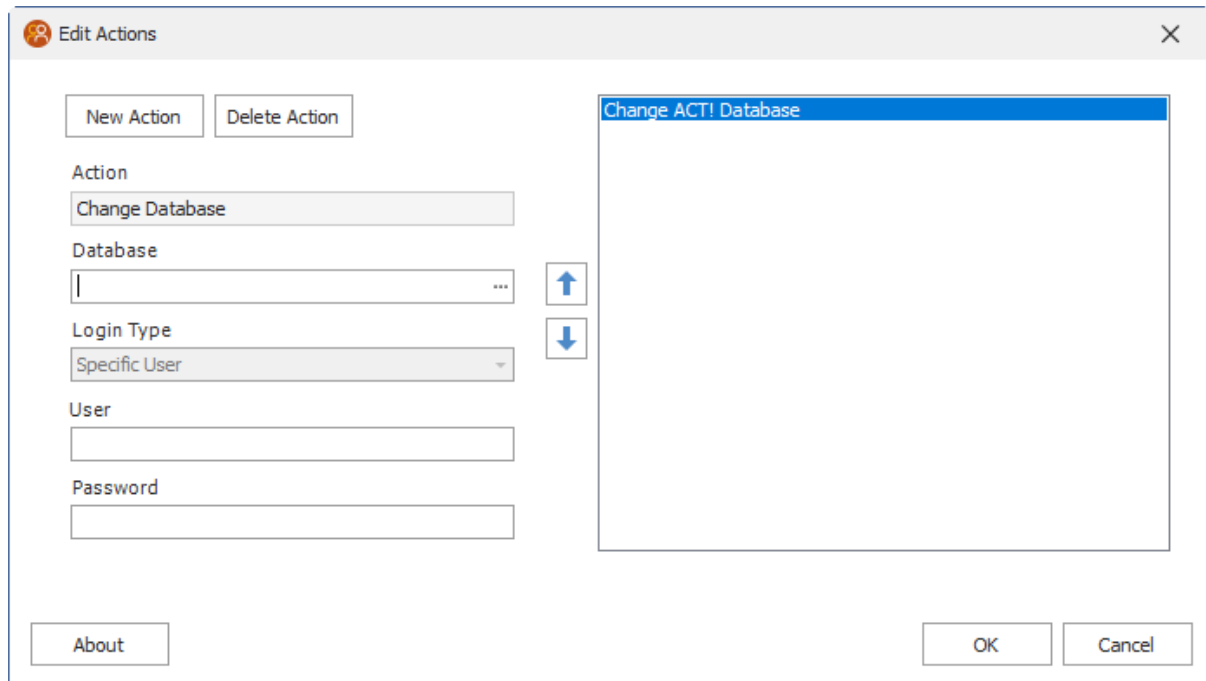
The Append Data function allows you to append a value to the target field. Choose the target field in the **To Field** drop-down, and then specify the value you want to append in the **Value To Append** section. This value can be a static value (for example "Apples"), a value from another field (for example "{Spouse}"), or a complex expression.



The screenshot shows the 'Edit Actions' dialog box. At the top left, there are 'New Action' and 'Delete Action' buttons. Below them, the 'Action' dropdown menu is set to 'Append Data'. The 'To Field' dropdown menu is empty. The 'Value To Append' text box is empty. To the right of these fields are two arrow buttons (up and down). At the bottom left, there is an unchecked checkbox labeled 'Write to previously created record' and an 'About' button. At the bottom right, there are 'OK' and 'Cancel' buttons. A large preview window on the right side of the dialog shows the text 'Append "" to ""'.

### 1.5.2 Change Database

Change Database will close the currently opened database and open the specified one. To avoid mismatches in usernames, it is usually advised to use the **Specific User** option selected in the **Login Type** drop-down.

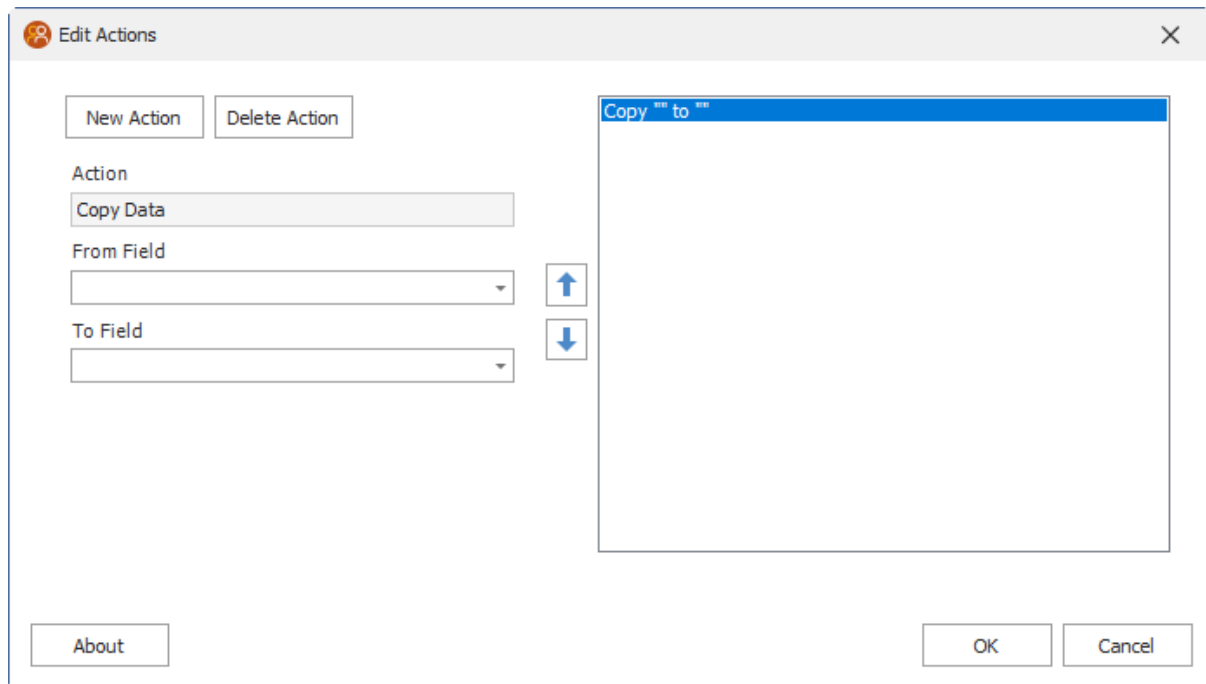


The screenshot shows the 'Edit Actions' dialog box with the following fields and controls:

- Buttons:** 'New Action', 'Delete Action', 'About', 'OK', and 'Cancel'.
- Action:** A text field containing 'Change Database'.
- Database:** A text field with a dropdown arrow (three dots) on the right.
- Login Type:** A dropdown menu currently showing 'Specific User'.
- User:** A text field.
- Password:** A text field.
- Navigation:** Up and down arrow buttons next to the 'Database' and 'Login Type' fields.
- Right Panel:** A list box containing 'Change ACT! Database'.

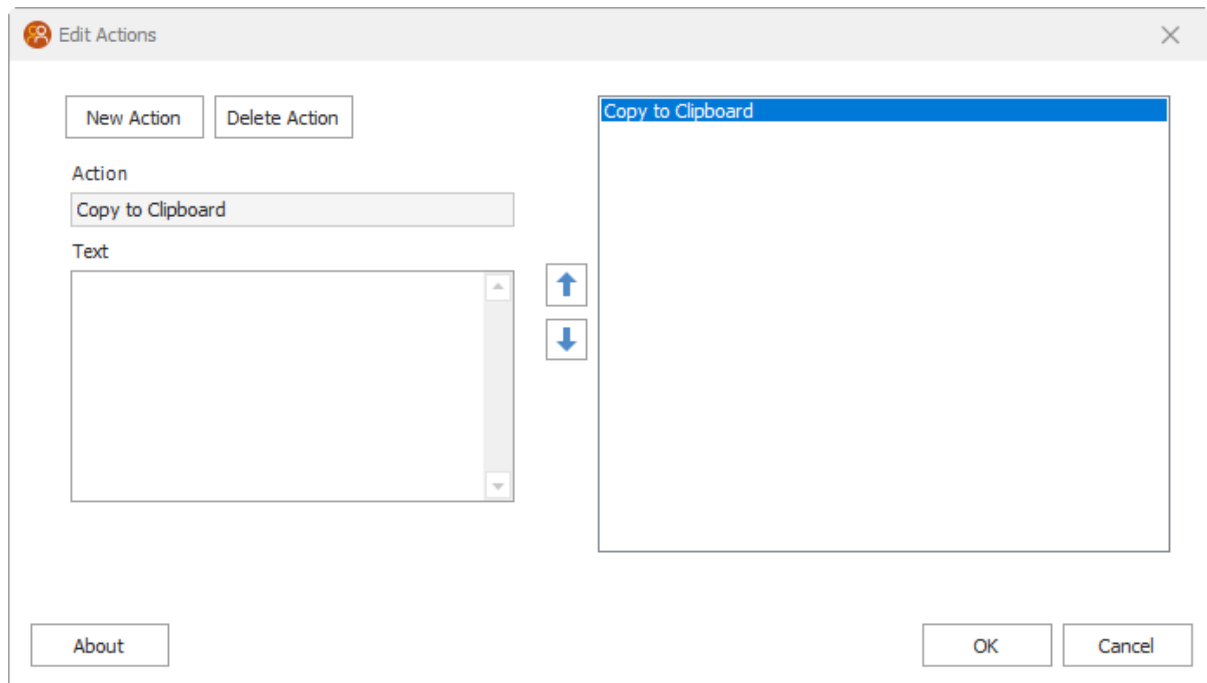
### 1.5.3 Copy Data

The Copy Data function allows you to copy data from a one field to another field. This will overwrite the value in the target field.



### 1.5.4 Copy to Clipboard

Copy the specified static text or data from a field specified as {field name}.

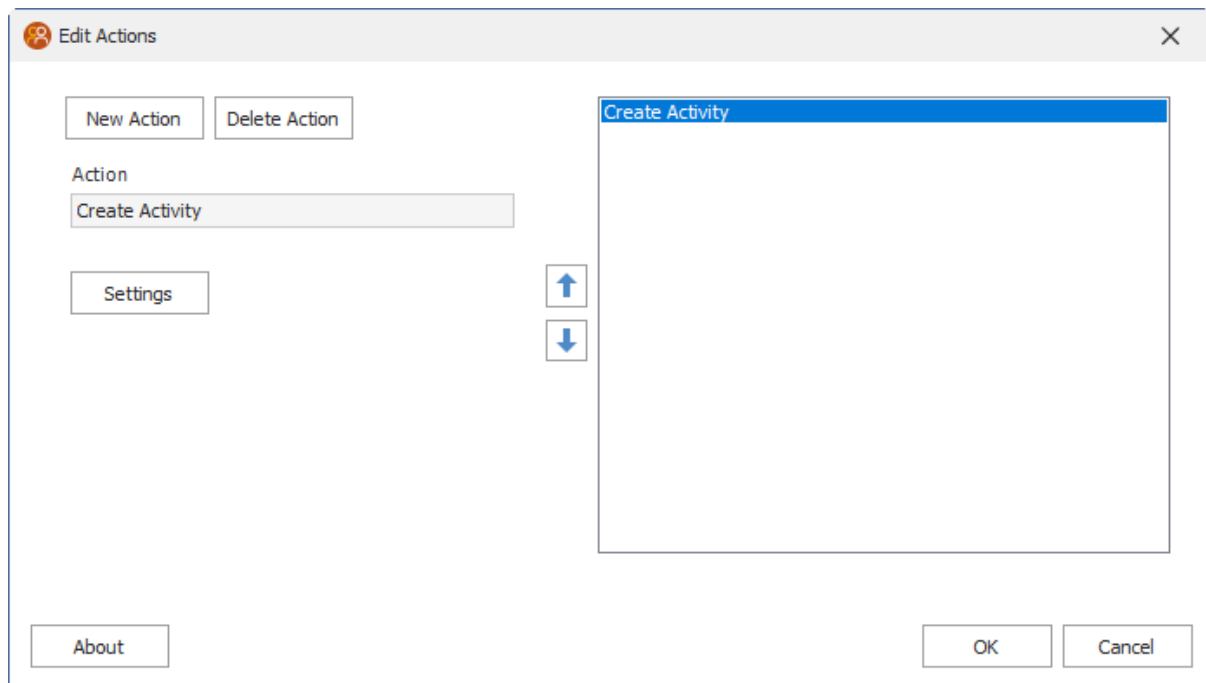




### 1.5.5 Create Activity

The Create Activity function enables the scheduling of an activity based on a date in a field on the current record. For example, if a user needed to commonly schedule an activity 45 days prior to a date on the record, that can be achieved using the Create Activity function.

Click the Settings button to view all options for the new activity.



Specify the following settings to create the new Activity.

Activity Options

General Settings

Details

Activity Type

Call

Priority

Low

Color

Regarding

Start Date

☒ Anchored

1

Days

From

Today

☐ Static Day

First

Tuesday

When

Next Month

☐ Static Date

19th

May

When

Schedule With

Associated Contacts and Companies

Contacts

☐ Associate With Current Record (Company/Group/Opportunity Records)

Schedule For

☐ If activity falls on a weekend, move to the

Previous Friday

☐ If activity falls on a blackout date, move to the

☐ Only count work days (Non-Blackout weekdays)

Start Time

12:00 AM

Duration

☐ Timeless

☐ Use Current Time

☐ Use Alarm

Lead Minutes

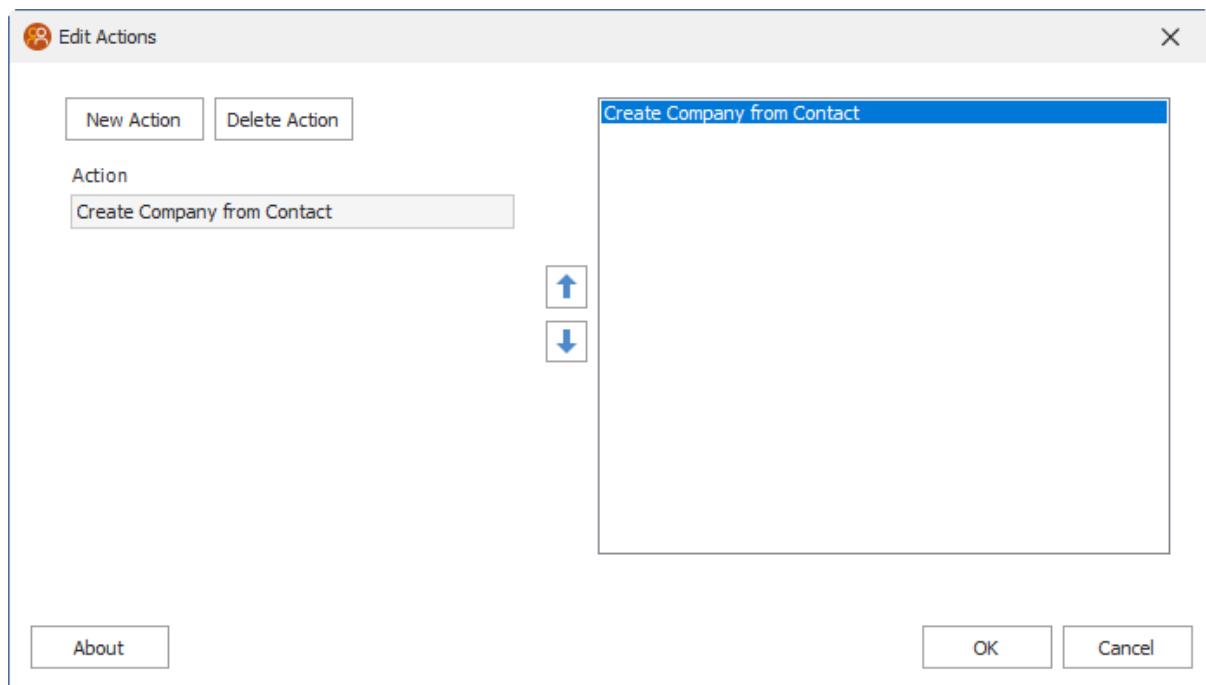
15

OK

Cancel

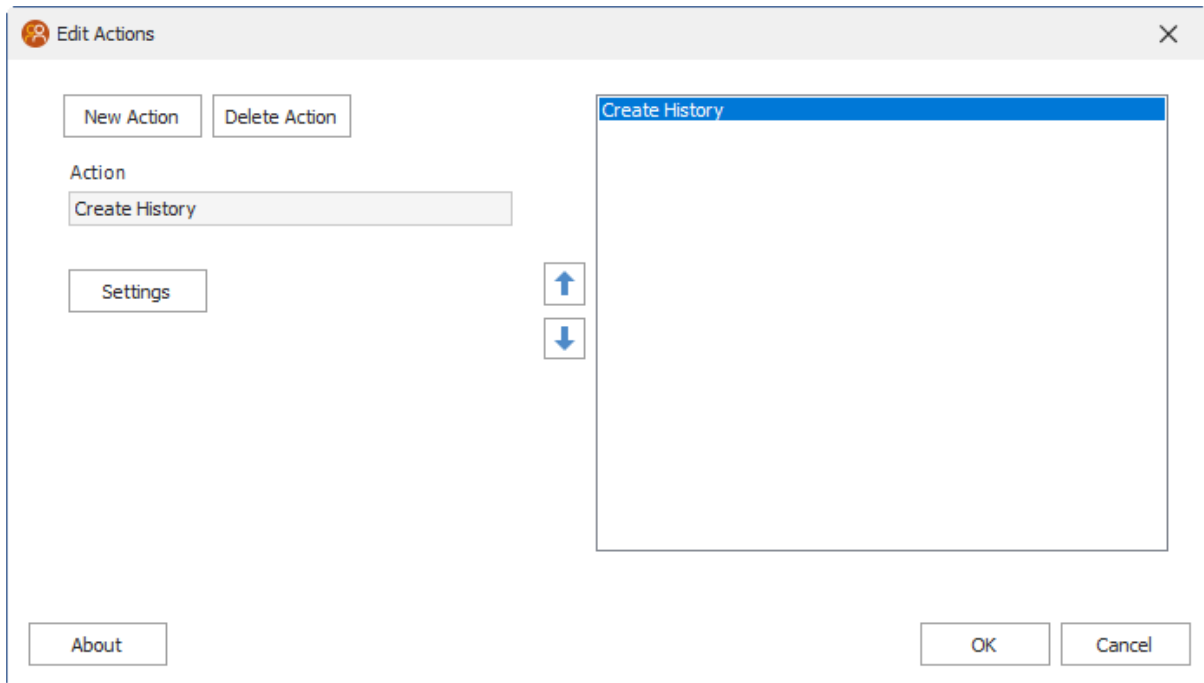
### 1.5.6 Create Company from Contact

Simply create a new Company based on data from the current Contact record.

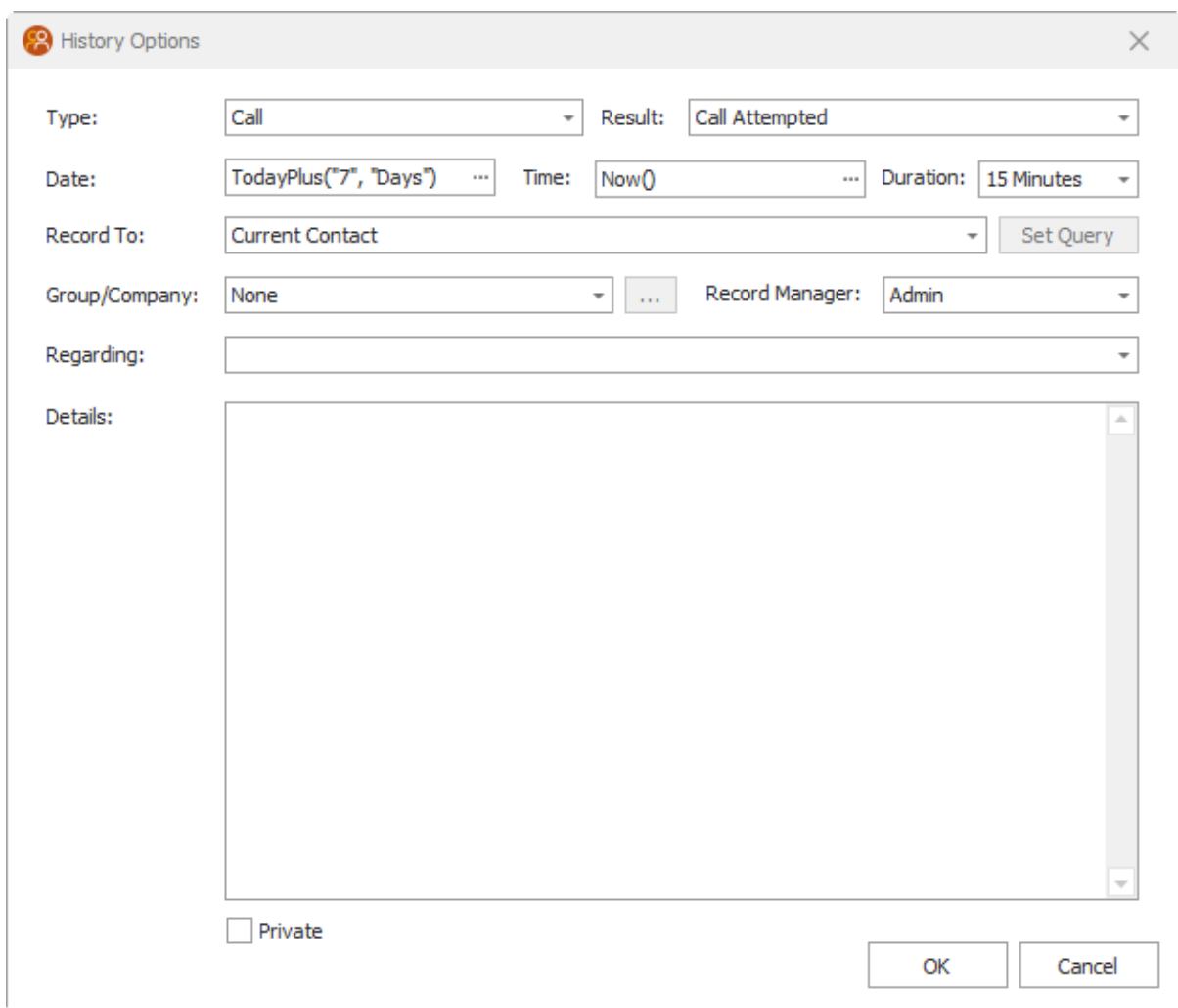


### 1.5.7 Create History

Create a new History with the specified settings. Click the Settings button to view all options for the new History.



Specify the following settings to create the new History.



The 'History Options' dialog box is a window with a title bar containing a user icon and the text 'History Options'. It features several input fields and buttons. The 'Type' field is a dropdown menu set to 'Call'. The 'Result' field is a dropdown menu set to 'Call Attempted'. The 'Date' field contains the text 'TodayPlus("7", "Days")' followed by an ellipsis button. The 'Time' field contains the text 'Now()' followed by an ellipsis button. The 'Duration' field is a dropdown menu set to '15 Minutes'. The 'Record To' field is a dropdown menu set to 'Current Contact', with a 'Set Query' button to its right. The 'Group/Company' field is a dropdown menu set to 'None', followed by an ellipsis button. The 'Record Manager' field is a dropdown menu set to 'Admin'. The 'Regarding' field is an empty dropdown menu. The 'Details' field is a large, empty text area with a vertical scrollbar on the right. At the bottom left, there is a checkbox labeled 'Private'. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

History Options

Type: Call Result: Call Attempted

Date: TodayPlus("7", "Days") ... Time: Now() ... Duration: 15 Minutes

Record To: Current Contact Set Query

Group/Company: None ... Record Manager: Admin


Regarding:

Details:

☐ Private

OK Cancel

When clicking the Date ... button, you'll see the following Date Constructor Dialog. Likewise, when clicking the Time ... button, you'll see the Time Constructor dialog. These will help you build your date and time values for the History Options dialog.

 Date Constructor ✕


Specify a Date Type

☐ Date - Specify a Date  
Year:  Month:  Day:

☐ Today - Set the Date for Today at Midnight  
Amount:  Period:

☒ TodayPlus - Add a Time period to Today's Date at Midnight

Result: 7/22/2022 12:00:00 AM  
Formatted: TodayPlus("1", "Days")

 Time Constructor ✕

Specify a Time Type

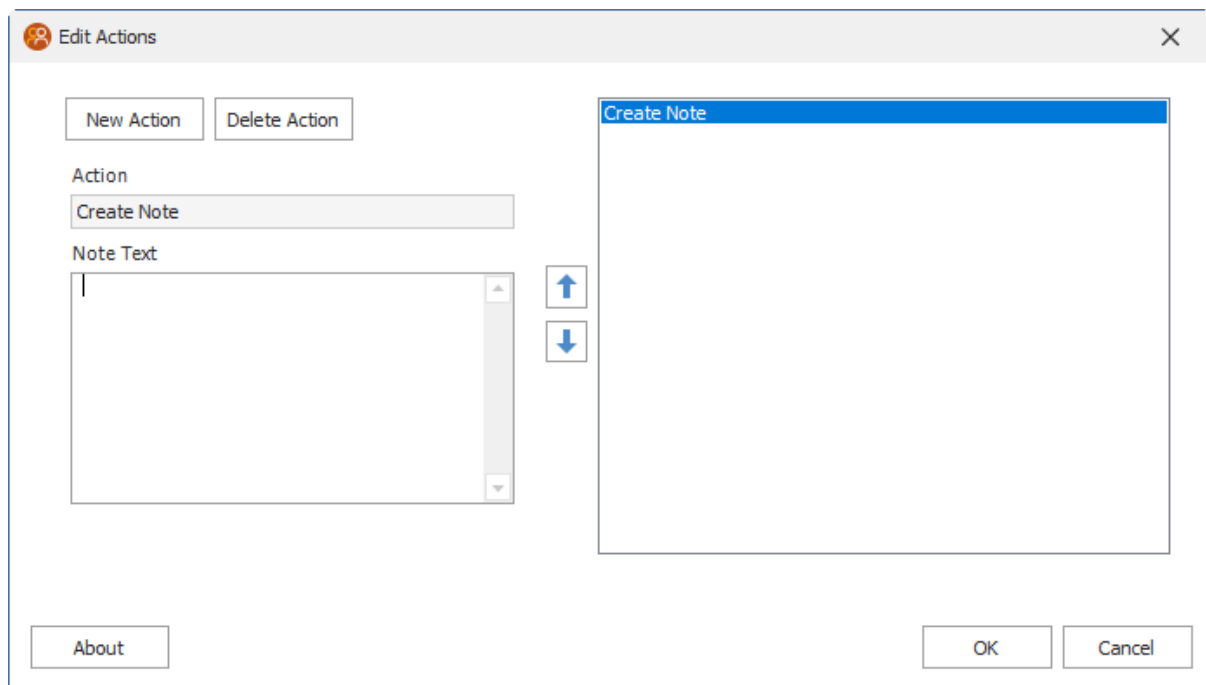
☒ Now - Set the Date and Time for Now

☐ NowPlus - Add a Time period to Today's date Now  
Amount:  Period:

Result: 7/21/2022  
Formatted: Now()

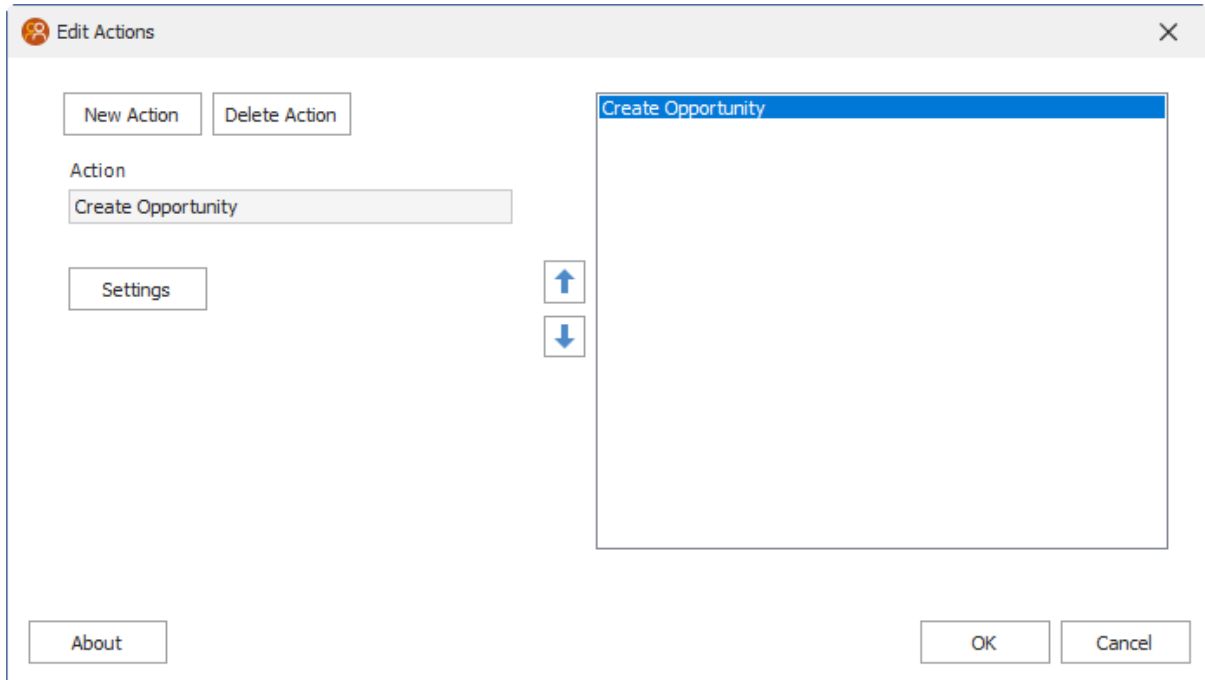
### 1.5.8 Create Note

Create a new Note from static text or data from a field specified as {Field Name}.



### 1.5.9 Create Opportunity

Create a new Opportunity with the specified settings. Click the Settings button to view all options for the new Opportunity.



Specify the following settings to create the new Opportunity.



Opportunity Options

Name:  
New Opportunity for {Contact} at {Company}

Contact:  
Current Contact

Associate With:  
Linked Company

Status

☒ Open  
☐ Closed - Won  
☐ Closed - Lost  
☐ Inactive

Forecast:



Process: Stage: Probability: Est. Close Date:  
Act! Sales Cycle Initial Communication 10 TodayPlus("30", "Days")

ITEMCODE	ITEMTYPE	UNITCOST	DISCOUNTPR	UNITDISCOU	UNITPRICE	NAME	EXTI
----------	----------	----------	------------	------------	-----------	------	------

☐ Private Opportunity

OK Cancel

When clicking the Date ... button, you'll see the following Date Constructor Dialog. These will help you build your date value for the Opportunity Options dialog.

 Date Constructor 

Specify a Date Type

☐ Date - Specify a Date  
Year:  Month:  Day:

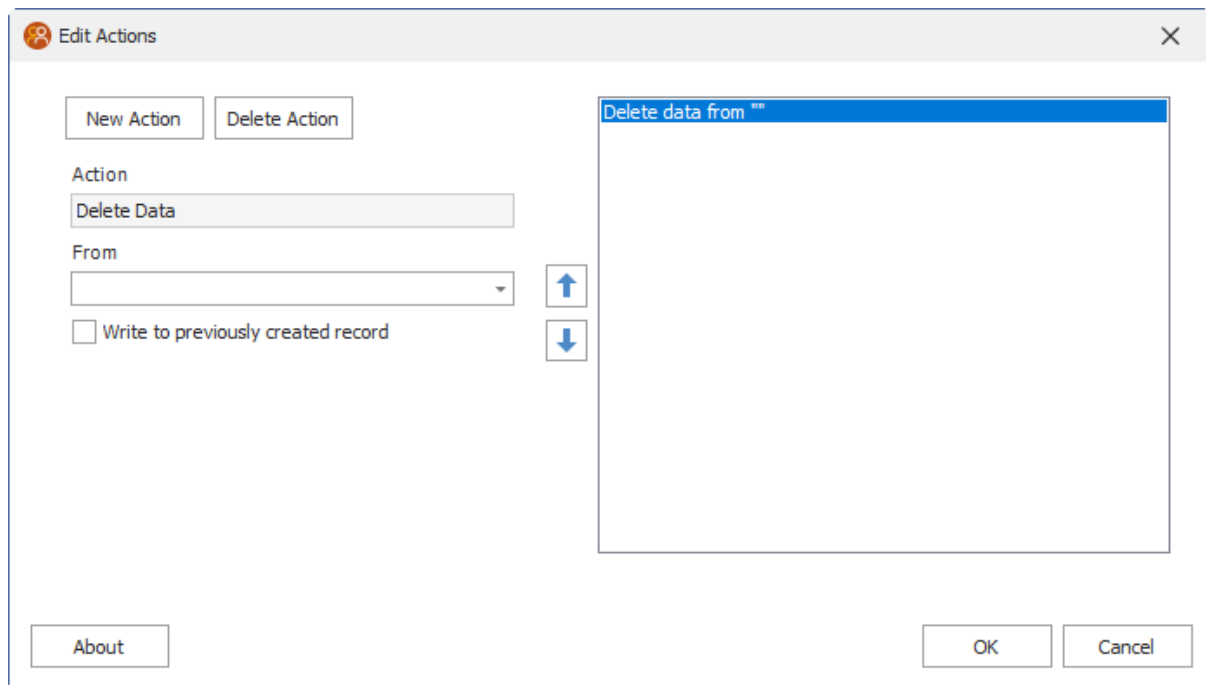
☐ Today - Set the Date for Today at Midnight  
Amount:  Period:

☒ TodayPlus - Add a Time period to Today's Date at Midnight

Result: 7/22/2022 12:00:00 AM  
Formatted: TodayPlus("1", "Days")

### 1.5.10 Delete Data

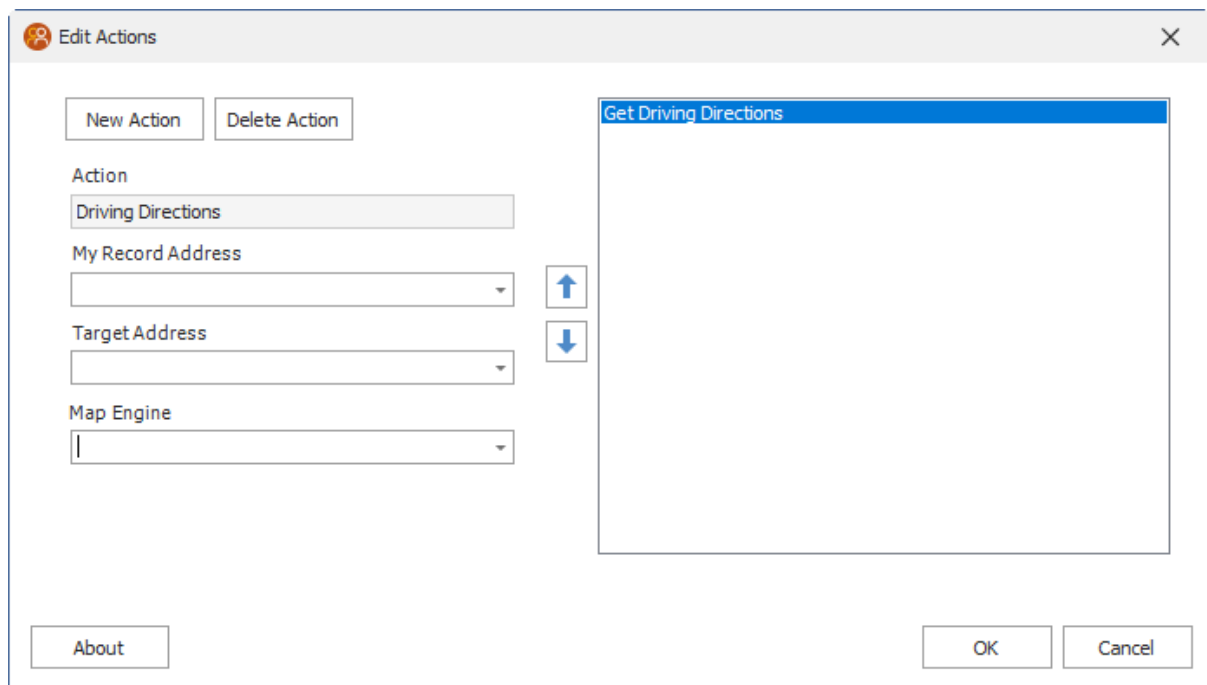
The Delete Data function will simply delete any data in the target field.



### 1.5.11 Driving Directions

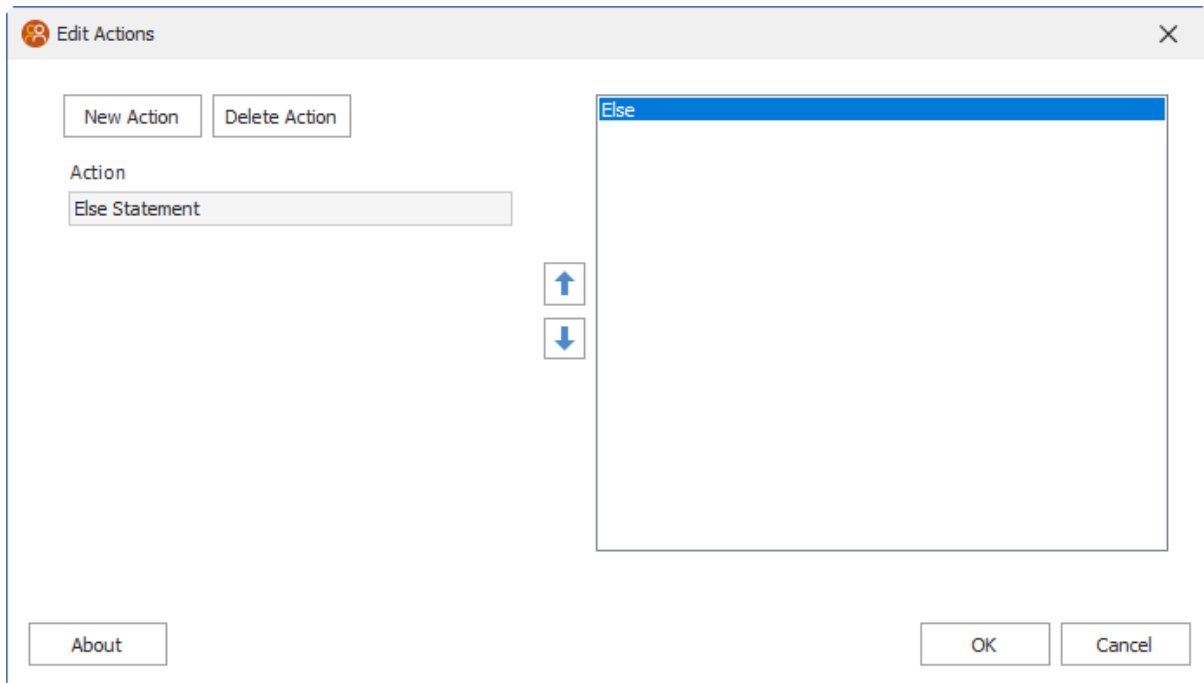
The Driving Directions function will open up driving directions from the My Record to the current record for the selected address blocks. Maps currently use Google Maps for these directions. MapQuest was removed due to changes in the MapQuest static lookup.

Specify what Address types to use for the My Record and the Target record.



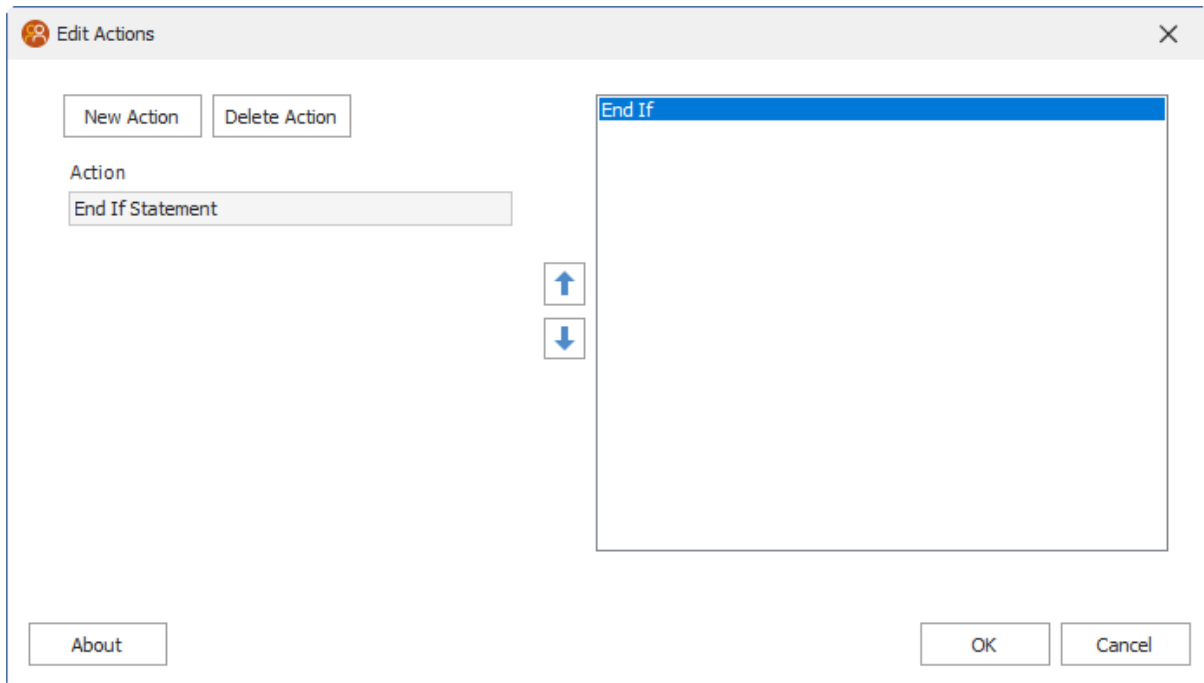
### 1.5.12 Else Statement

The Else statement is used as part of the conditional If statement and allows for alternate actions, different from the initial If statement.



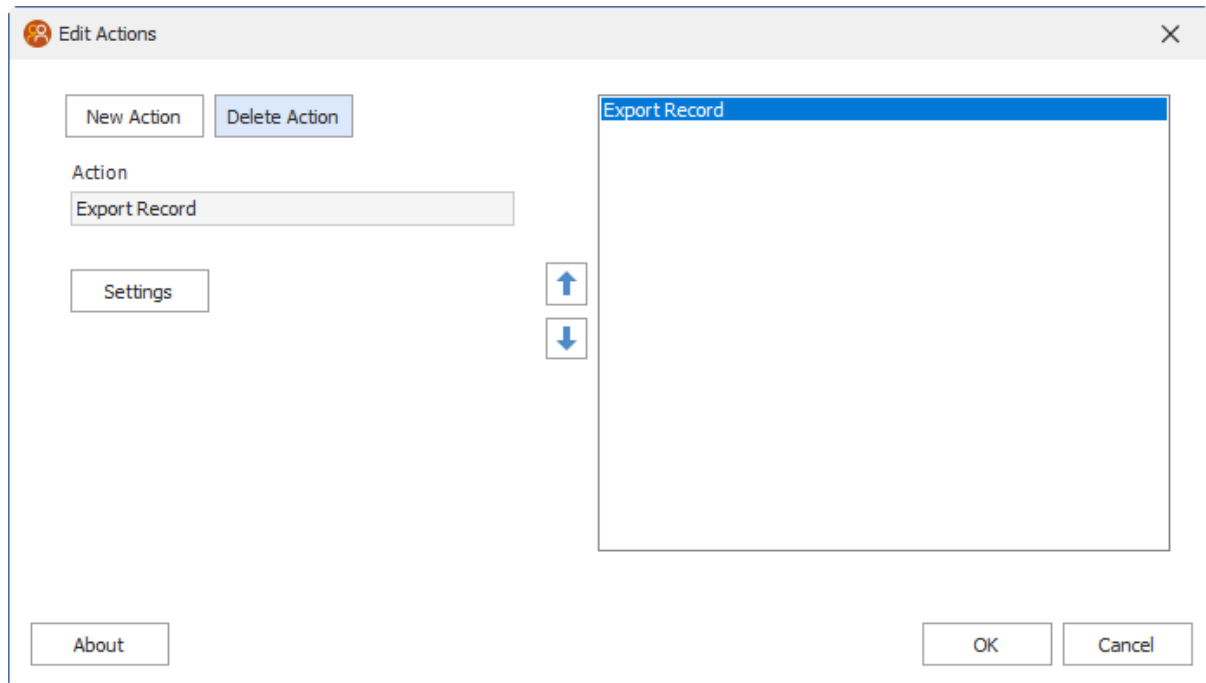
### 1.5.13 End If Statement

The End If statement is used as part of the conditional If statement and signifies the end of the If statement.

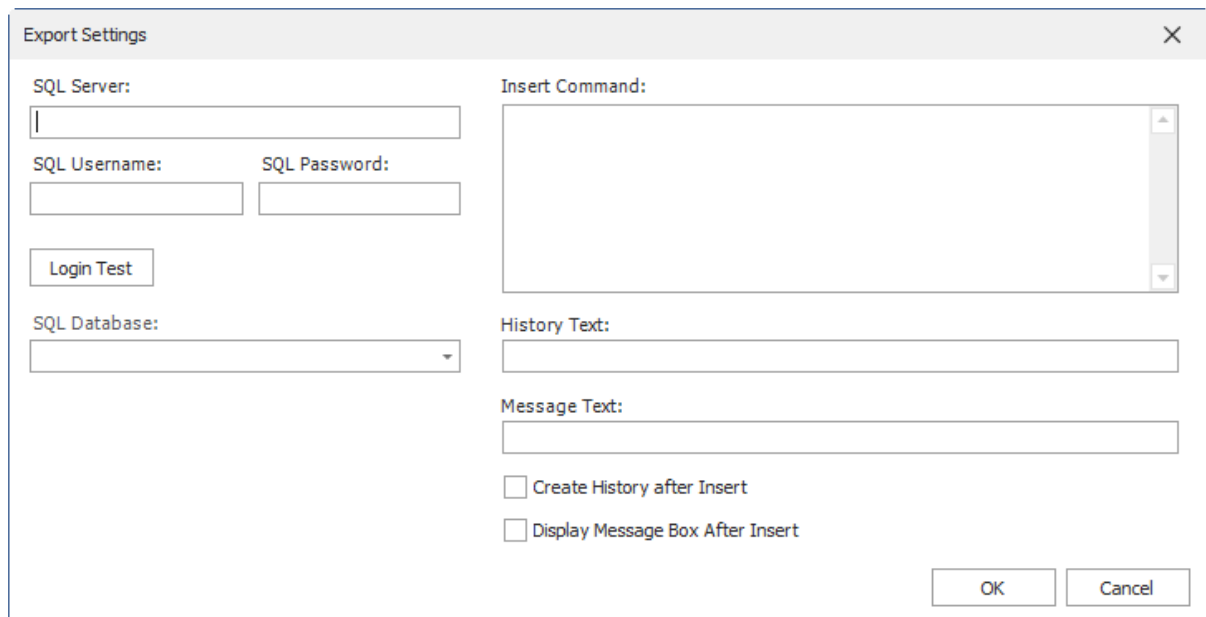


### 1.5.14 Export Record

Export your data to a SQL database.



Specify the following settings to export data to a specified SQL database and table.



### 1.5.15 Go To

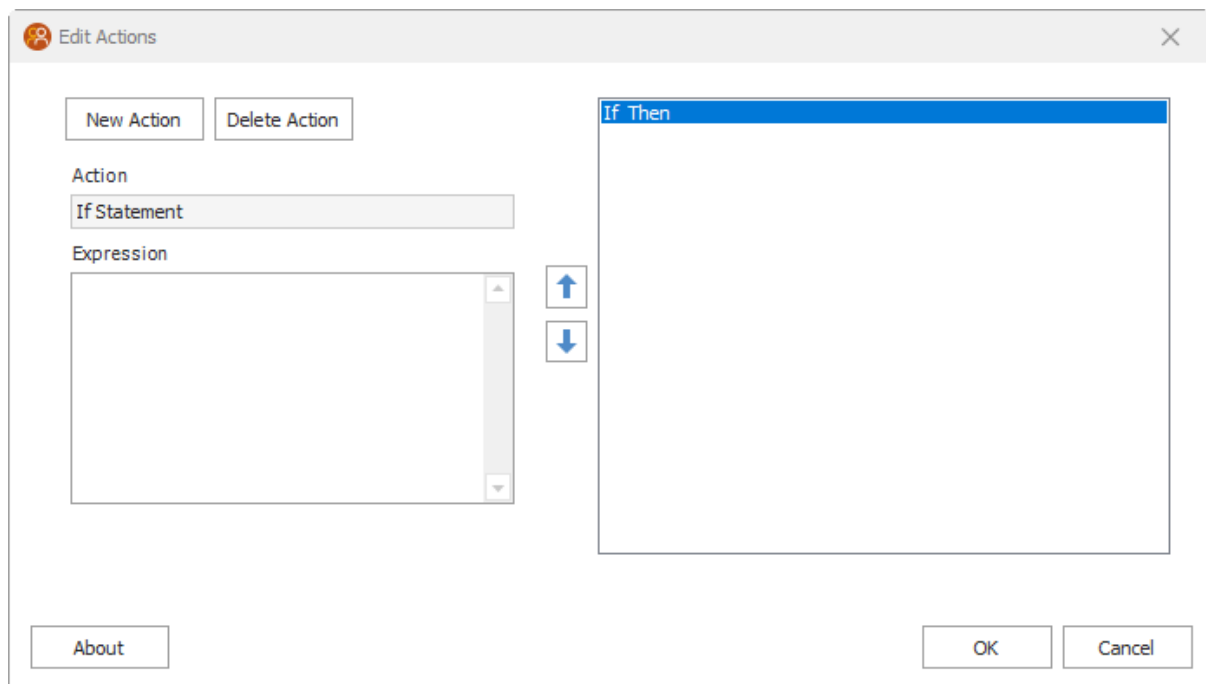
The Go To function will perform a lookup and present the results to the user. Go To can look up one or many Contacts, Groups, or Companies. If no result is found, nothing will happen when. Go To can use field queries, or specific other criteria, such as taking the user to the Linked Company, or the first group record found that the contact belongs to.

The screenshot shows the 'Edit Actions' dialog box with a title bar containing a person icon and a close button. Inside the dialog, there are two buttons at the top left: 'New Action' and 'Delete Action'. Below these, the 'Action' field is set to 'Go To'. The 'Entity Type' field is a dropdown menu, and the 'Find How' field is also a dropdown menu. To the right of these fields are two small square buttons with up and down arrows. On the right side of the dialog is a large rectangular area titled 'Go To Record' with a blue header bar. At the bottom left is an 'About' button, and at the bottom right are 'OK' and 'Cancel' buttons.



### 1.5.16 If Statement

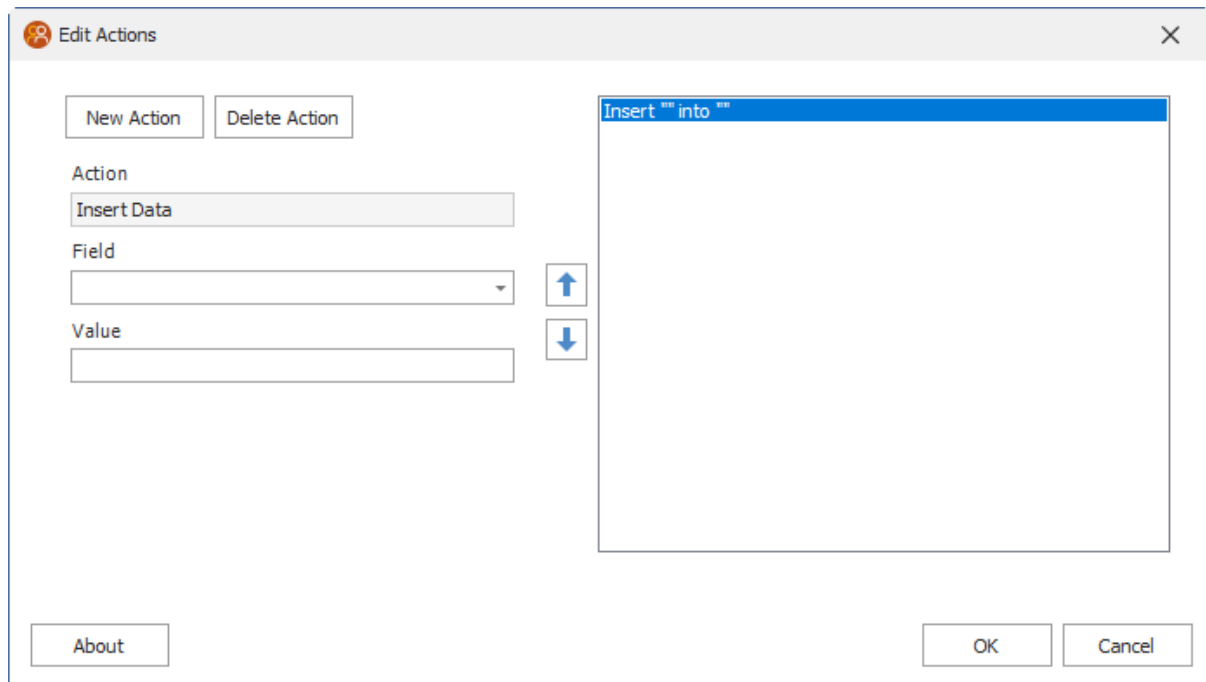
The If statement is a conditional statement that, if proved true, performs a function. If the condition is false, you can include an Else statement to perform the alternate function.



### 1.5.17 Insert Data

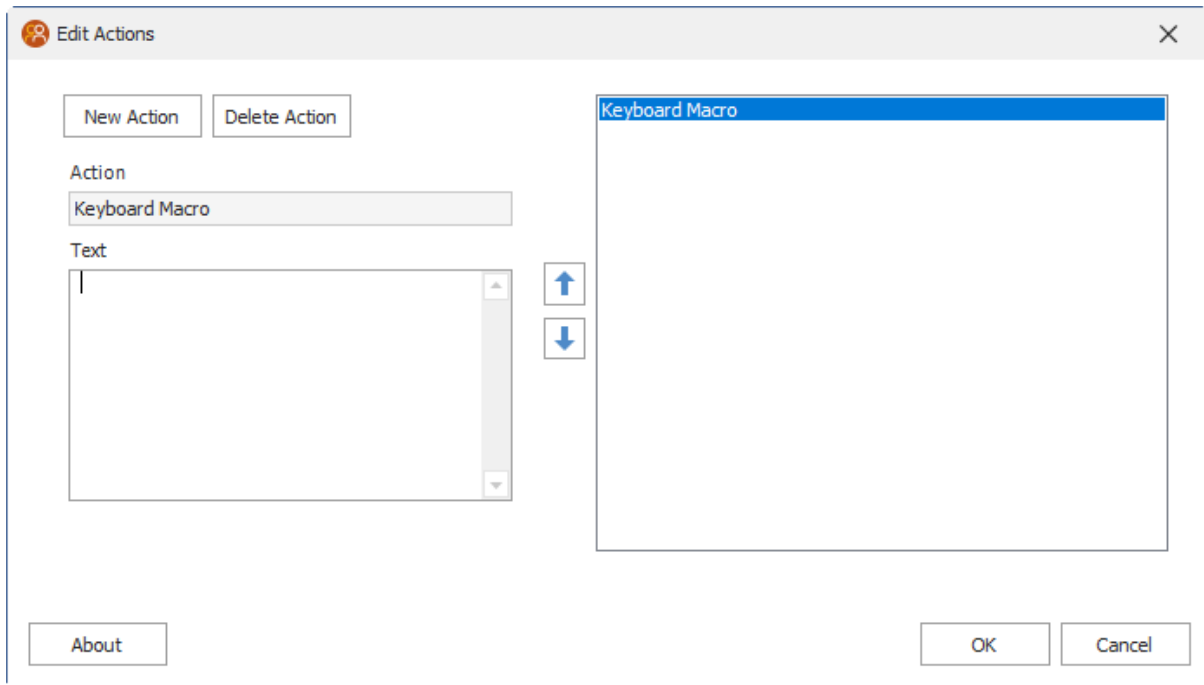
The Insert Data function allows you to insert a value at the beginning of the target field. Choose the target field in the **Field** drop-down, and then specify the value you want to insert in the **Value** section.

This value can be a static value (for example "Apples"), a value from another field: {User 1}, or a complex expression.



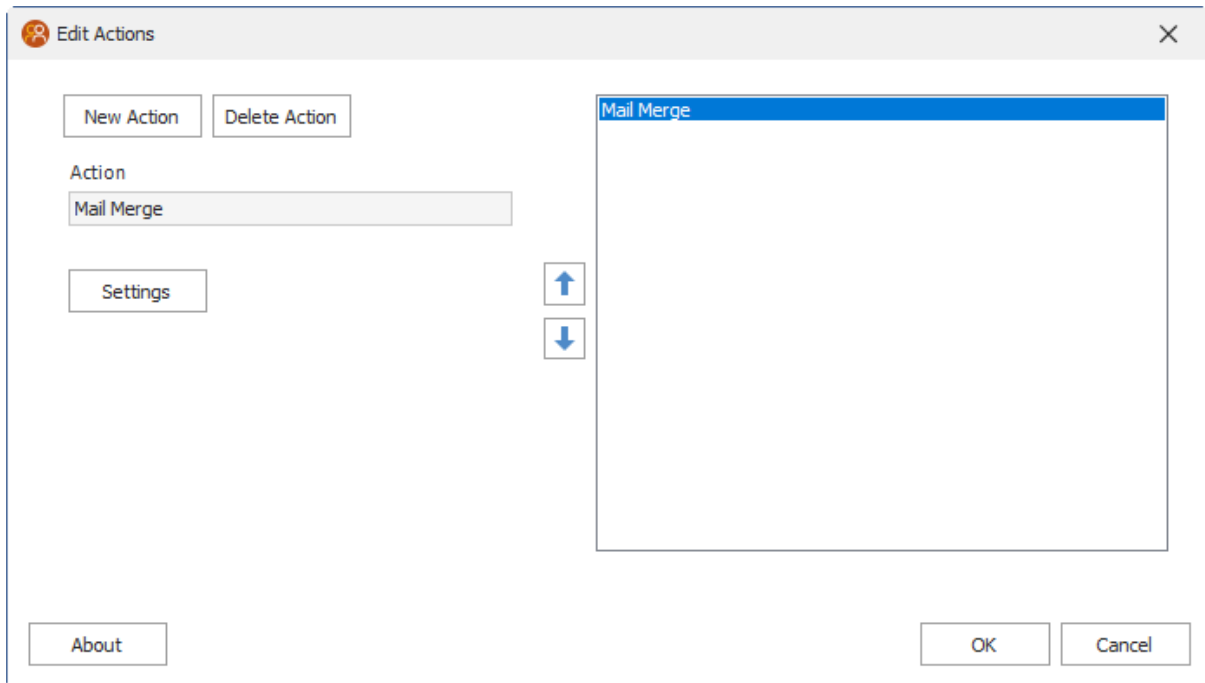
### 1.5.18 Keyboard Macro

Keyboard Macro allows the user to send keys directly to Act!. See the Act! user's guide for the various keyboard commands.



### 1.5.19 Mail Merge

The Mail Merge action allows the user to merge a specified template to the Word Processor, send it as an E-mail or save the merged file.



Click the Settings button in the previous screen to see the Mail Merge Options.

Mail Merge Options

Mail Merge Type

☒ Word Processor

☐ E-mail

Send To:  2

Subject:

From:

☐ File

Save As:

Template:

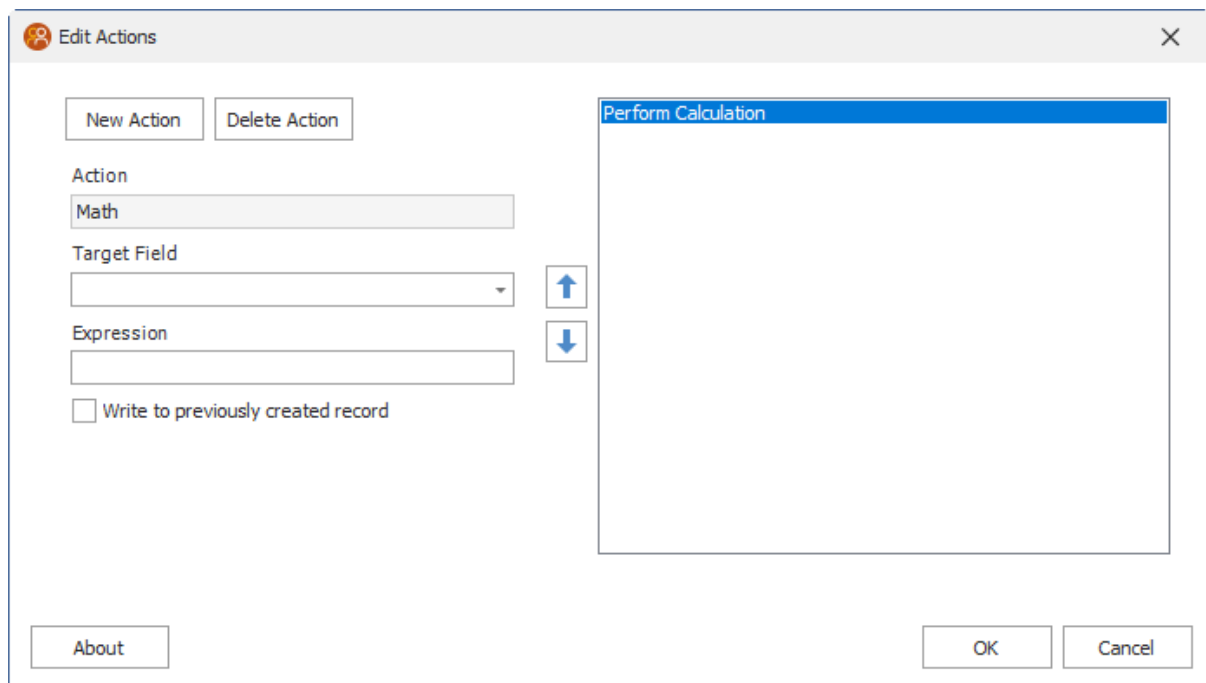
Merge For

Current Contact

### 1.5.20 Math

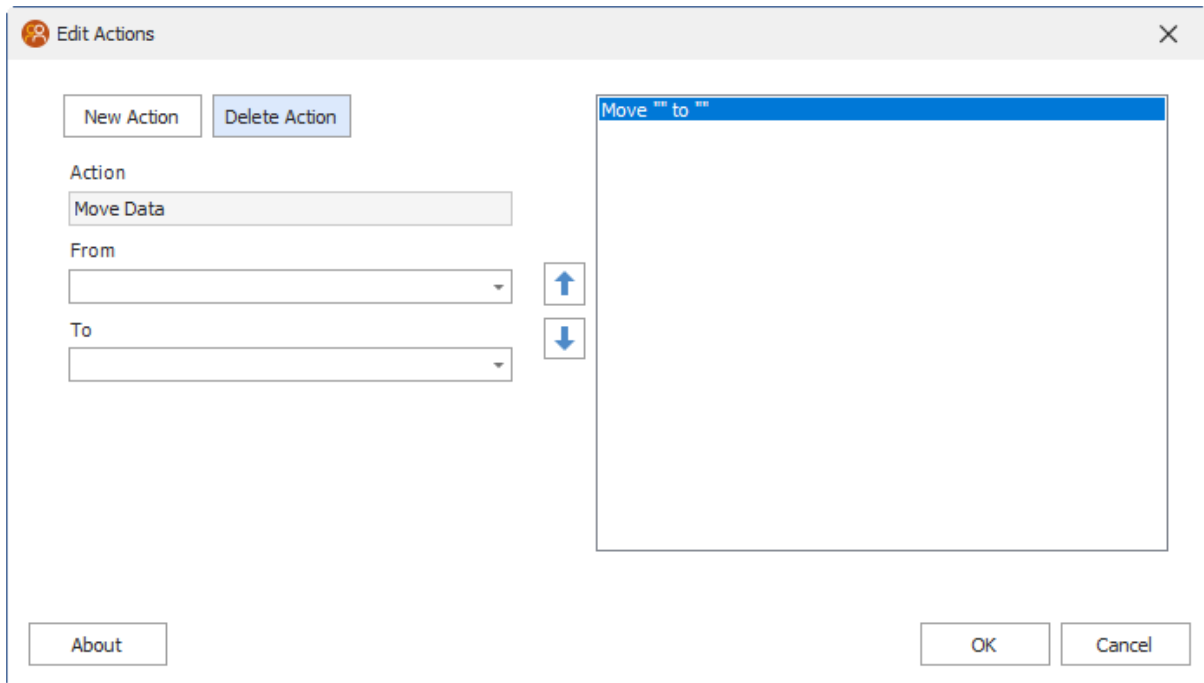
Automator4Act uses an advanced system to be able to offer the user very complex mathematical expression evaluation. Normal mathematical expressions such as "5 + 5", more complex expressions such as "{Amount Owed} \* (.08 \* (365 / DaysSince({Create Date})))", and extremely complex expressions involving If statements, sin(), cos(), tan(), exponents, and other mathematical operators and methods are all valid. Simply choose the target field, and enter in the expression.

For much more powerful Math and String manipulation, try Keystroke's ConCalculator product.



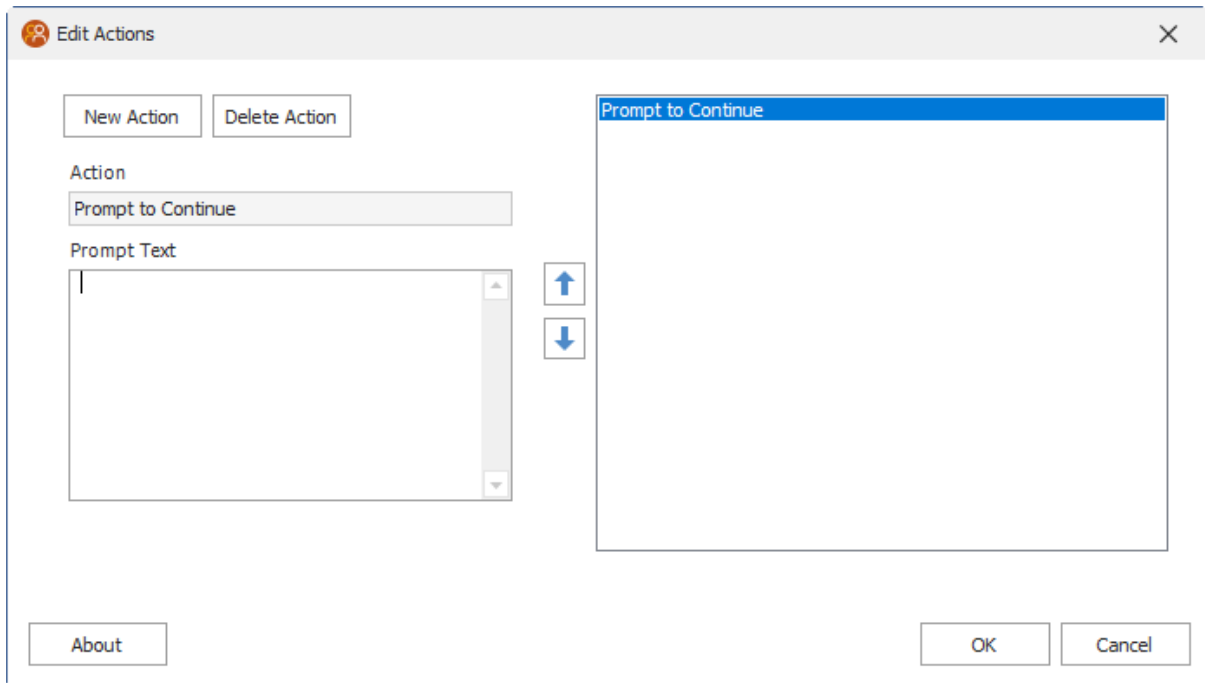
### 1.5.21 Move Data

The Move Data function will move a value from one field to another. The value will no longer exist in the source field.



### 1.5.22 Prompt to Continue

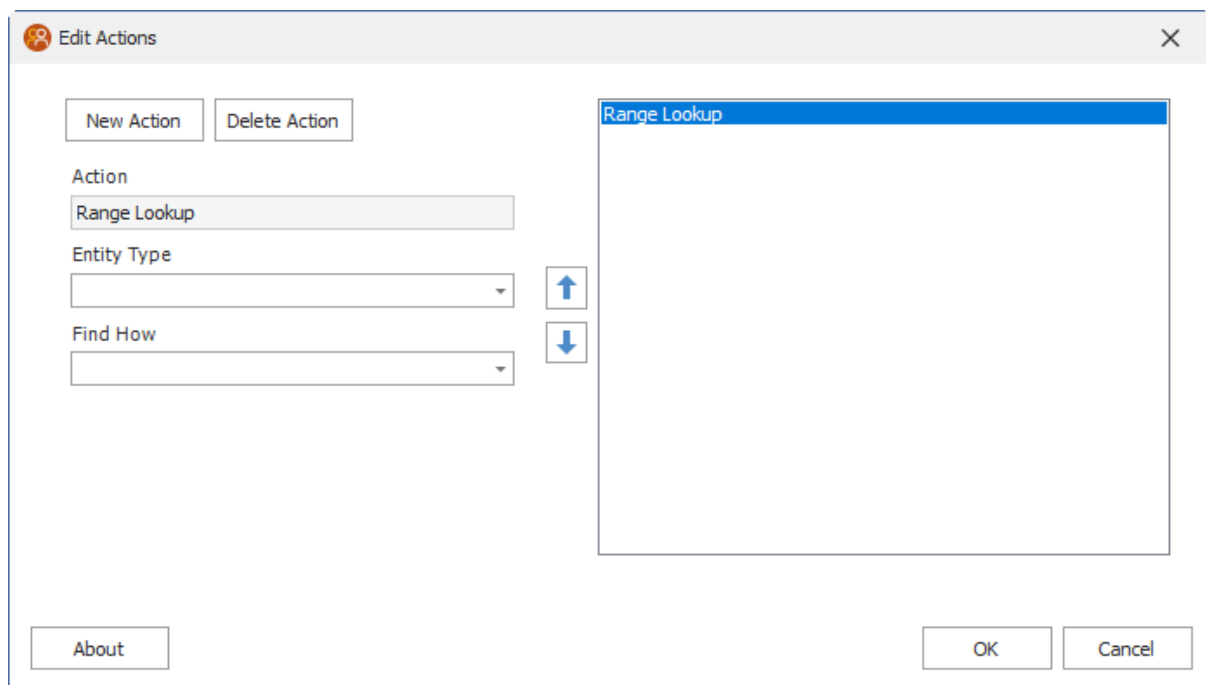
Prompt to Continue will pause execution of multiple actions, until the prompt is responded to.





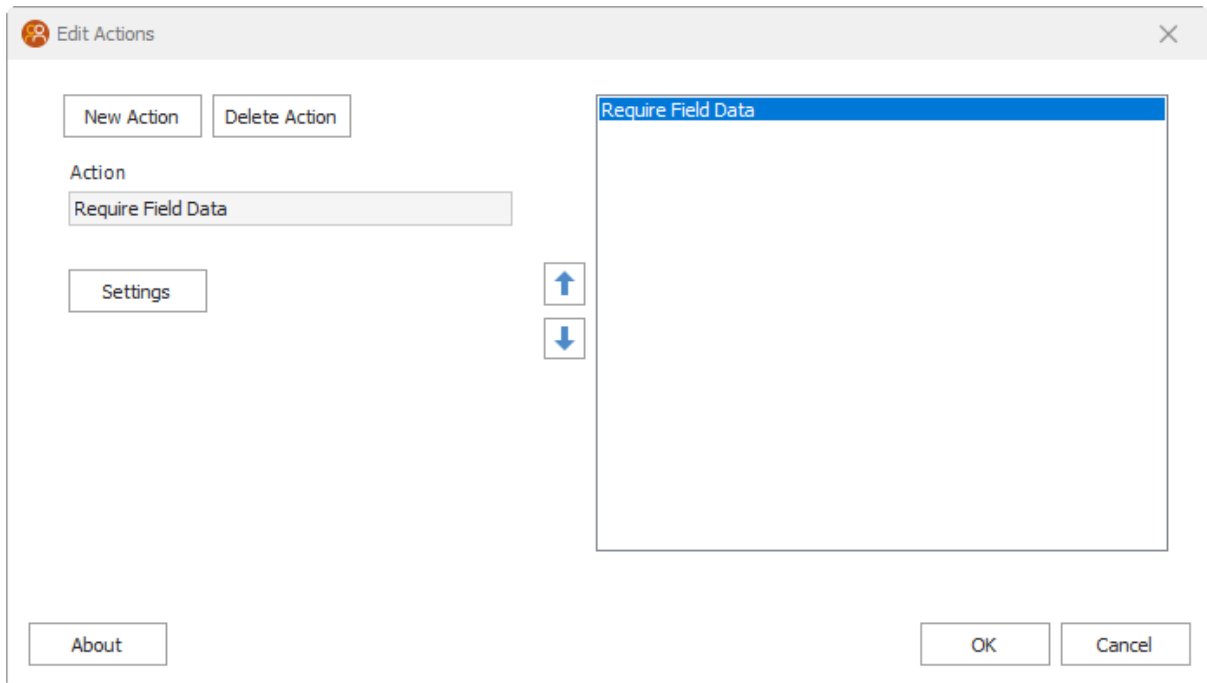
### 1.5.23 Range Lookup

The Range Lookup function is identical to the Go To function, except that if it finds more than 1 record that matches the criteria, it will allow the user to specify that they want to only create a lookup of records X through Y. This can be useful in situations where you need to do a large mail merge, and don't want to mail merge to ALL contacts at once. Use Range Lookup to do the lookup, and return records 1 through 99, then 100 through 199, then 200 through 299, etc.



### 1.5.24 Require Field Data

Require Field Data allows you to ensure that certain criteria is met before saving the current record.



After clicking the Settings button in the previous dialog, you then click the Add button to setup your specified criteria.

Required Field Data Options

Required Fields:

Field:

Condition:

Value:

Invalid Data Message:

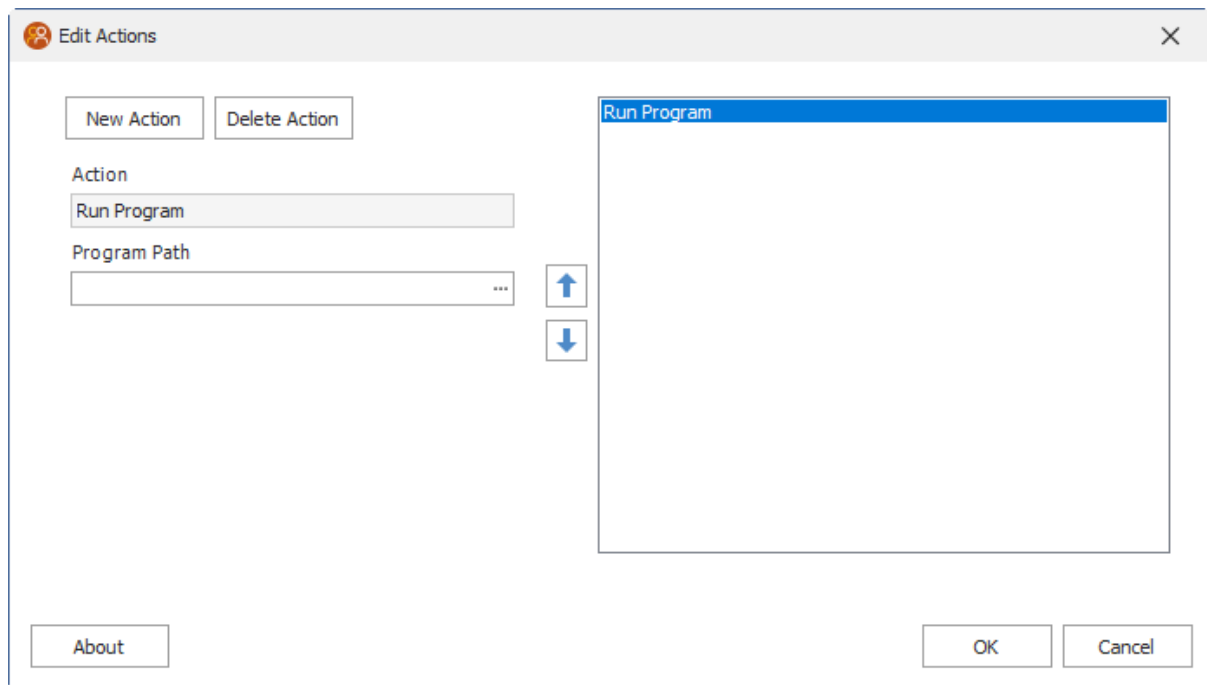
Add Remove OK Cancel

### 1.5.25 Resolve Zip Code

Resolve Zip Code has been removed from Automator4Act due to changes with the United States Postal System no longer allowing static lookups.

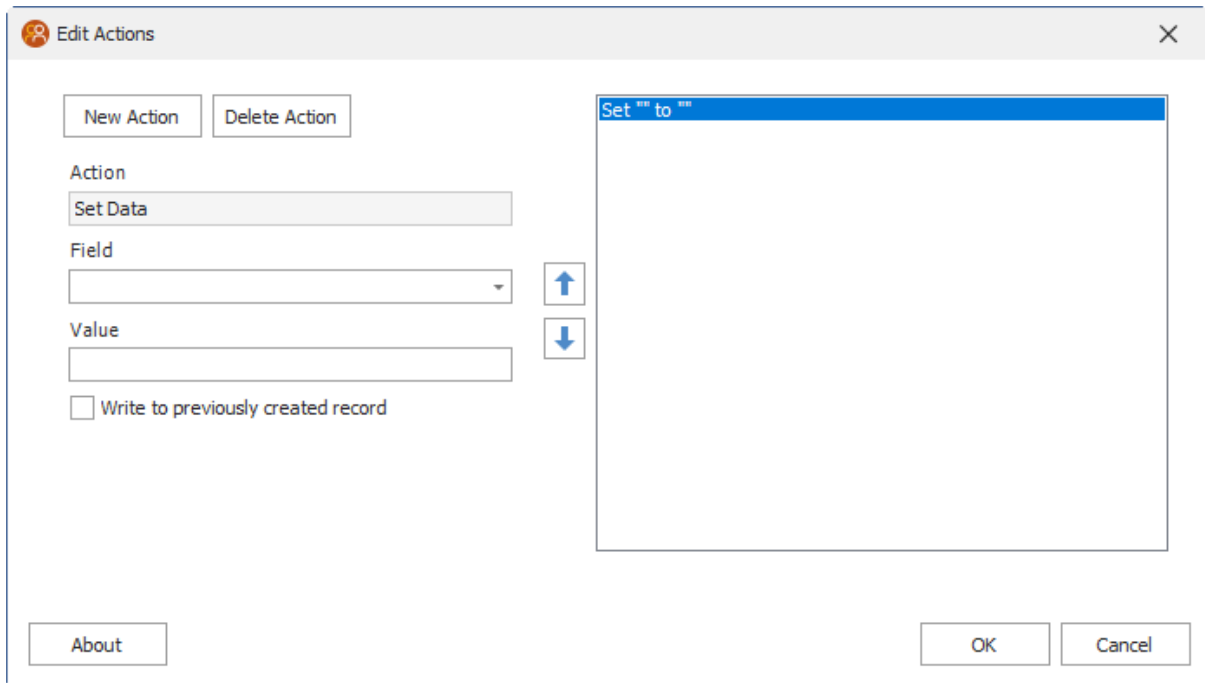
### 1.5.26 Run Program

The Run Program function makes it possible to launch a program, and pass command line parameters along to it. This is a great way to get around the issue that Act! field entry and exit triggers will not allow command line parameters to be passed to external programs.



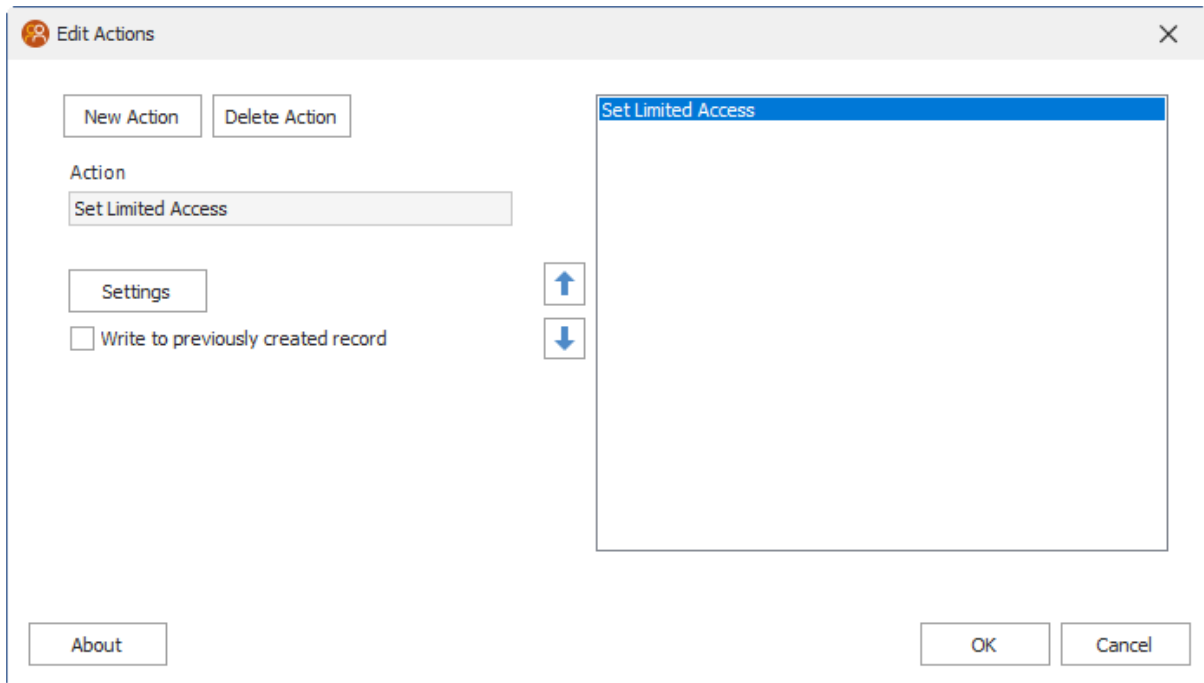
### 1.5.27 Set Data

The Set Data function simply overwrites the target field with a value. This value can be a static value, a value from another field (using the {Field Name} notation), or an expression that is evaluated.



### 1.5.28 Set Limited Access

The Set Limited Access action allows the user to restrict records based on the criteria specified in the Limited Access Options dialog.



Click the Settings button in the previous dialog to access these options. You can select one or more Users and/or Teams.

Limited Access Options

Users: Teams:

☐ [Current Record's Record Ma  
☐ [Current User]  
☐ A  
☐ Admin  
☐ B  
☐ Designer - Do Not Delete  
☐ Duane

Add Dynamic User based on the  
field named Add

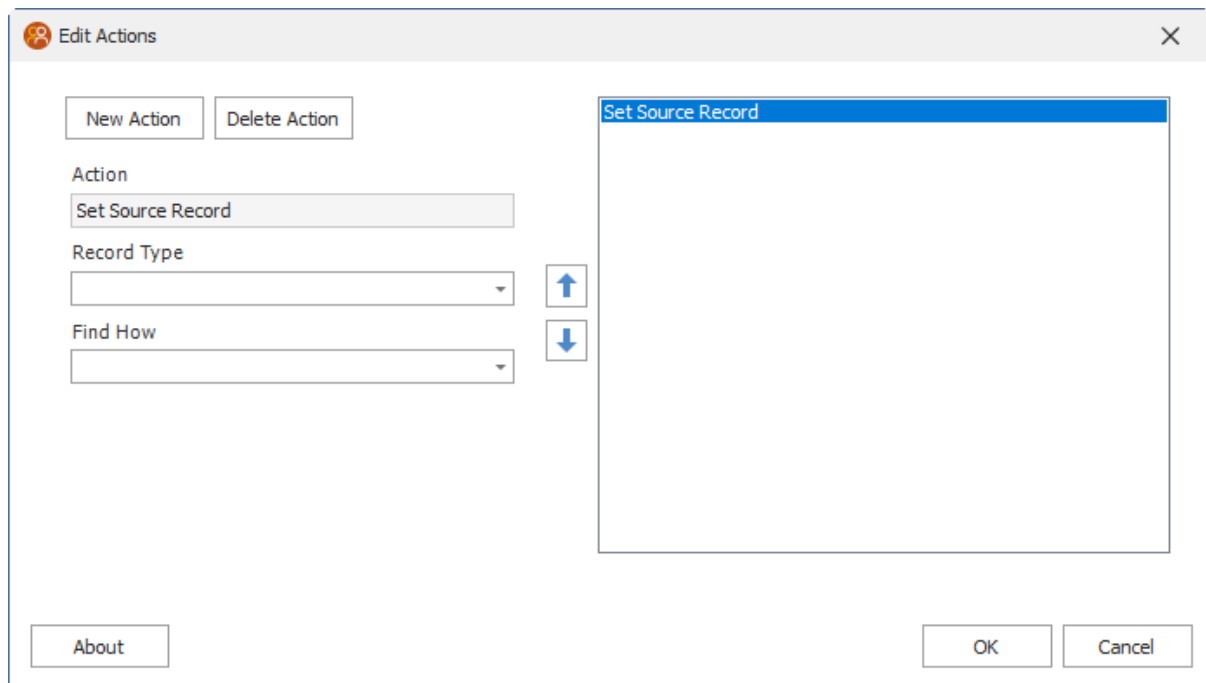
☒ Set Limited Access to Selected Values  
☐ Add Selected Values to Existing Limited Access Users/Teams

OK Cancel



### 1.5.29 Set Source Record

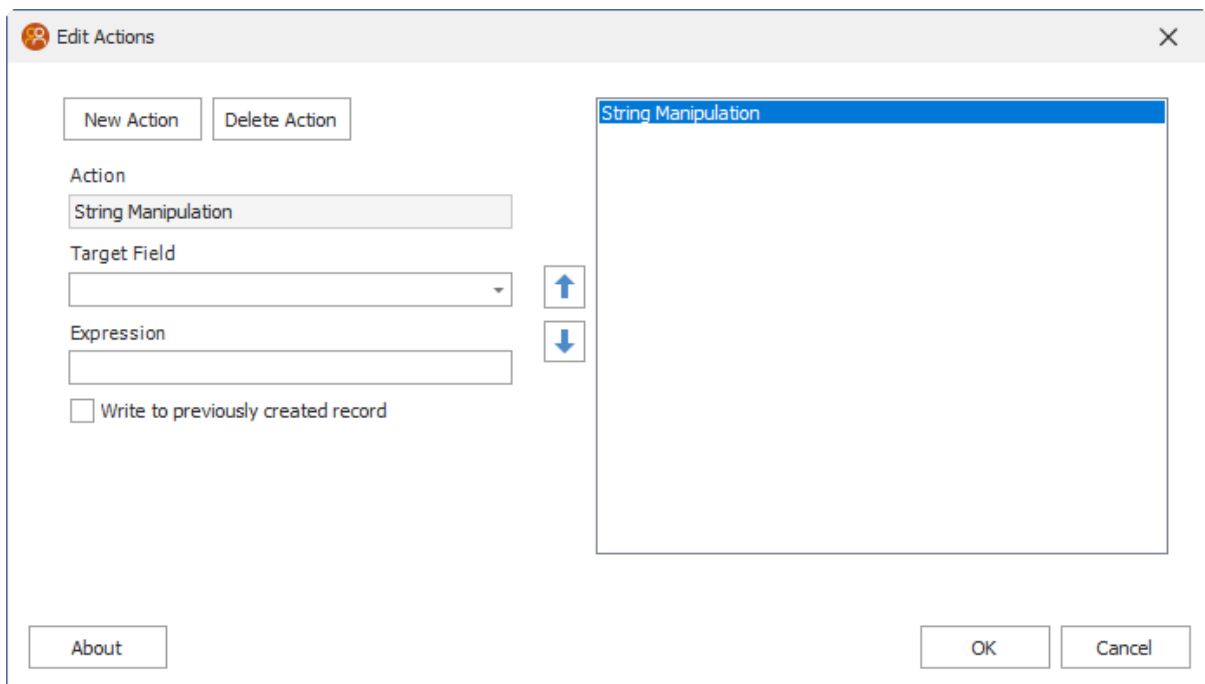
The Set Source Record function will cause Automator4Act to read values from the record chosen by the user when Set Source Record is called. For example, if a user is in the real estate business, they often want to be able to keep track of several contacts who are participating in the transaction. Using the Set Source Record function, the user could be prompted to choose a Realtor, and then copy the name, address, phone, etc. from the chosen realtor to the current record. This eliminates data entry errors, and is all around a lot faster than manually looking up the desired contact, writing down the details, and entering them on the borrower's record.



### 1.5.30 String Manipulation

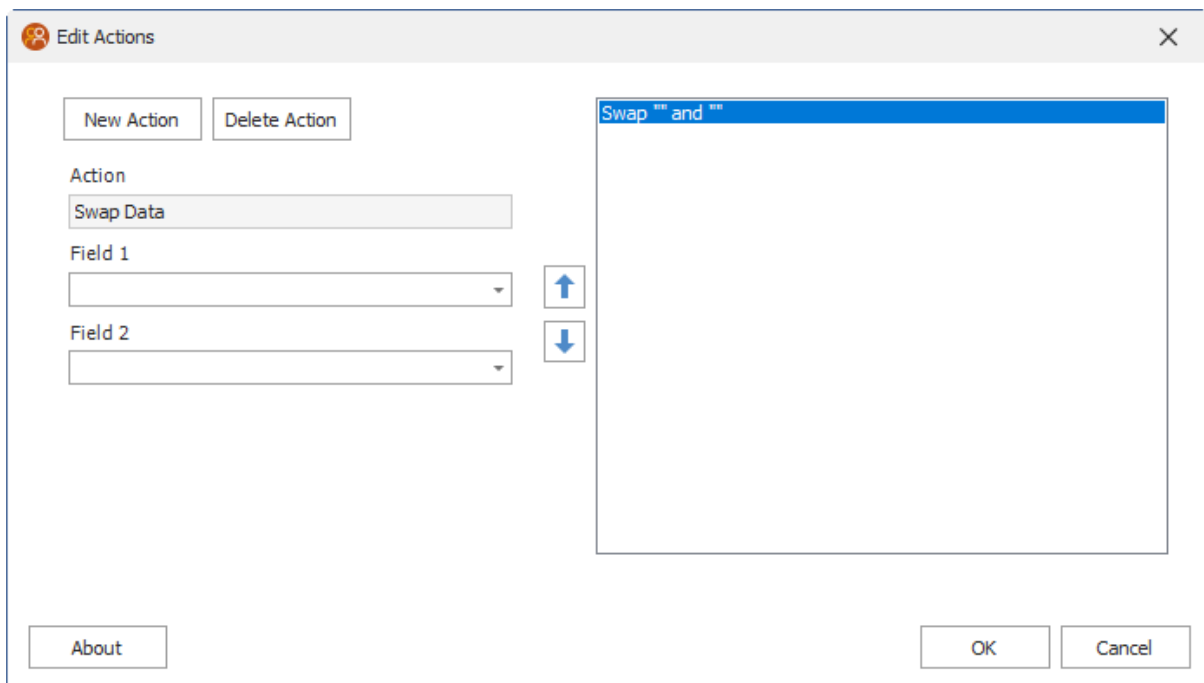
The String Manipulation function is designed to work with the complex expressions required to correctly massage data for things like concatenating the First Name and Spouse's first name into a certain field.

Functionally, String Manipulation is identical to Set Data, except that String Manipulation automatically calls Eval() on the value.



### 1.5.31 Swap Data

The Swap Data function will trade values between two fields. This can be very handy when dealing with two address blocks and the ability to run a mail merge on both is needed.



## 1.6 Advanced Query Editor

### 1.6.1 Advanced Query Editor

Some functions allow the user to Set Criteria. Clicking the Set Criteria button will display the advanced query editor.

This editor is similar to the Act! Advanced Query Editor. See below for an example of using the Contact entity's State field equal to AZ.

Advanced Query Editor

Type:  Field Name:  Operator:  Value:

Add To List

(	Type	Field Name	Operator	Value	)	And/Or
▶	Contact	State	Equal To (=)	AZ		End

Move Up  
Move Down  
Remove  
Remove All

OK Cancel

1. In any "value" field, a field name inside curly braces (for example, {Contact}) will cause Automator4Act to copy the value from the specified field before running any other functions. For example, to perform a lookup for all people in the same city as the current contact, add a new action button, set the first action as a "Go To", choose "Contact" as the entity, "Field Criteria" as the method to find them, and then set up the query dialog as follows:

Advanced Query Editor

Type: Contact Field Name: City Operator: Equal To (=) Value: |

Add To List

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

Move Up

Move Down

Remove

Remove All

OK Cancel

2. Actions are executed in the order they are displayed in the Action Editor. A "Set Source Record" that comes before subsequent "Copy Data" functions will copy data from the selected source record.
3. In a "value" field, you can use expressions. For example, to create an "Add Employee" button, add a button to the layout, then set its action to "Set Data", and in the value enter: **Eval({Number of Employees} + 1)**  
This will increment the number of employees by 1. The Eval() function has many functions it can call, outside of performing general mathematical operations. These include Sin(), Cos(), Tan(), SendKeys(), Now(), Today(), Rnd(), Random(), Mid(), InStr(), Len(), Trim(), If(), Format(), UCase(), LCase(), WCase(), Date(), Int(), Round(), and GetString().  
Explanations of these functions can be found in the Functions section.
4. When using the Eval() function, the keyword "Contact" is equal to the current Act! Contact object. This means that things such as "Contact.ID", or "Contact.Fullname" can be used. Other functions that are not listed above will be searched for. Many Visual Basic functions can be accessed inside the Eval() function. The only way to know if something will work is to try it out. In general, using GetString() instead of Something.ToString works better in this context.

## 1.7 Functions

### 1.7.1 Date Functions

#### Date(Number Year, Number Month, Number Day)

The Date() function accepts three numbers as input. It will return a Date variable with the value of the input Month, Day, and Year.

#### Now()

The Now() function does not accept input. It returns the current date and current time.

**NowPlus()**

The NowPlus() function accepts two input values.

Value 1 is the amount of time, Value 2 is the time period. See below for values.

Both Amount and Period values require quotes, example: NowPlus("7", "Days")

**Today()**

The Today() function does not accept input. It returns the current date and time of midnight.

**TodayPlus(String Amount, String Period)**

The TodayPlus() function accepts two input values.

Value 1 is the amount of time, Value 2 is the time period. See below for values.

Both Amount and Period values require quotes, example: TodayPlus("7", "Days")

**TimePeriods for NowPlus and TodayPlus:**

Days

Hours

Minutes

Months

Seconds

Weeks

Years

## 1.7.2 Math Functions

**Cos(Number)**

The Cos() function takes a number as its input and returns the cosine of that number.

**Int(Number)**

The Int() function accepts a single number as input. Its function is to truncate any decimal portion. For

example, 1.2 becomes 1. 1.9 also becomes 1.

**Sin(Number)**

The Sin() function takes a number as its input and returns the sine of that number.

**Random()**

The Random() function does not accept input. It returns a random number (double-precision) between 0 and 100.

**Rnd(Optional Number)**

The Rnd() function can accept a number as its input. If a number is given, Rnd() will return a number

between 0 and the number input. If no input is made, Rnd() returns an integer between 0 and 100.

**Round(Number)**

The Round() function accepts a single number as input. Its function is to round that number to the nearest whole number.

**Tan(Number)**

The Tan() functions takes a number as its input and returns the tangent of that number.

### 1.7.3 String Functions

**Format(Object, String)**

The Format() function accepts as input an object value (string, integer, double, etc) and formats it based on the value in the string.

**GetString(Object)**

The GetString() function accepts a single value as input. Its function is to attempt to convert the input to a string, regardless of what it is.

**InStr(String, String)**

The InStr() function accepts two strings as input. Its function is to look for the second string inside of the first string, and if found it returns the location of the second string within the first string. If no result is found, the returned value will be below 1.

For example: InStr("The quick brown fox jumped over the lazy dog.", "jumped") would return 20. This function is NOT case sensitive.

**Len(String)**

The Len() function accepts a single string as input. Its function is to return a count of the number of characters in the string.

**LCase(String)**

The LCase() function accepts a single string as input. Its function is to convert the string to all lowercase.

**Mid(String, Integer, Integer)**

The Mid() function accepts a string, an integer, and another integer as input. Its function is

to return the portion of the string starting at the first integer and continuing for a number of characters equal to the second integer. For example, Mid("Duane Anderson", 1, 5) would return "Duane".

**Trim(String)**

The Trim() function accepts a single string as input. Its function is to remove any white space from the beginning and the end of the string.

**UCase(String)**

The UCase() function accepts a single string as input. Its function is to convert the string to uppercase.

**WCase(String)**

The WCase() function accepts a single string as input.

Its function is to convert the string to alternating upper/lower case such as: WaCkY CaSe.



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