Knowtifier

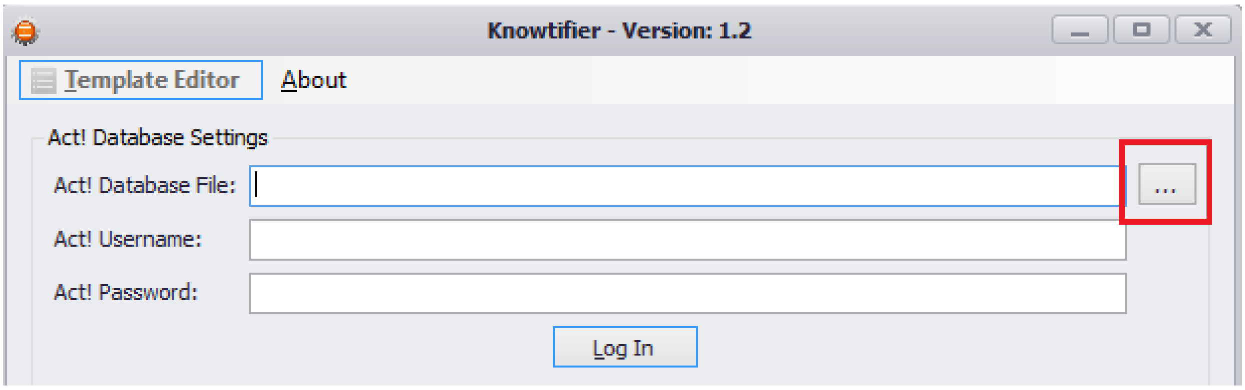
How do i set up the Knowtifier?

In this article, we will briely go over setting up the Knowtifier. 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.

Note For IT Admins: If the database is not hosted on the machine where Knowtifier is installed, please ensure the database is shared with the "Everyone" group with full access. If the network share requires domain authentication, please follow the instructions below to install the Knowtifier service and navigate to the Windows Services list by running **services.msc** and change the Knowtifier Service to run as a domain user instead of the default Local System.

Installation

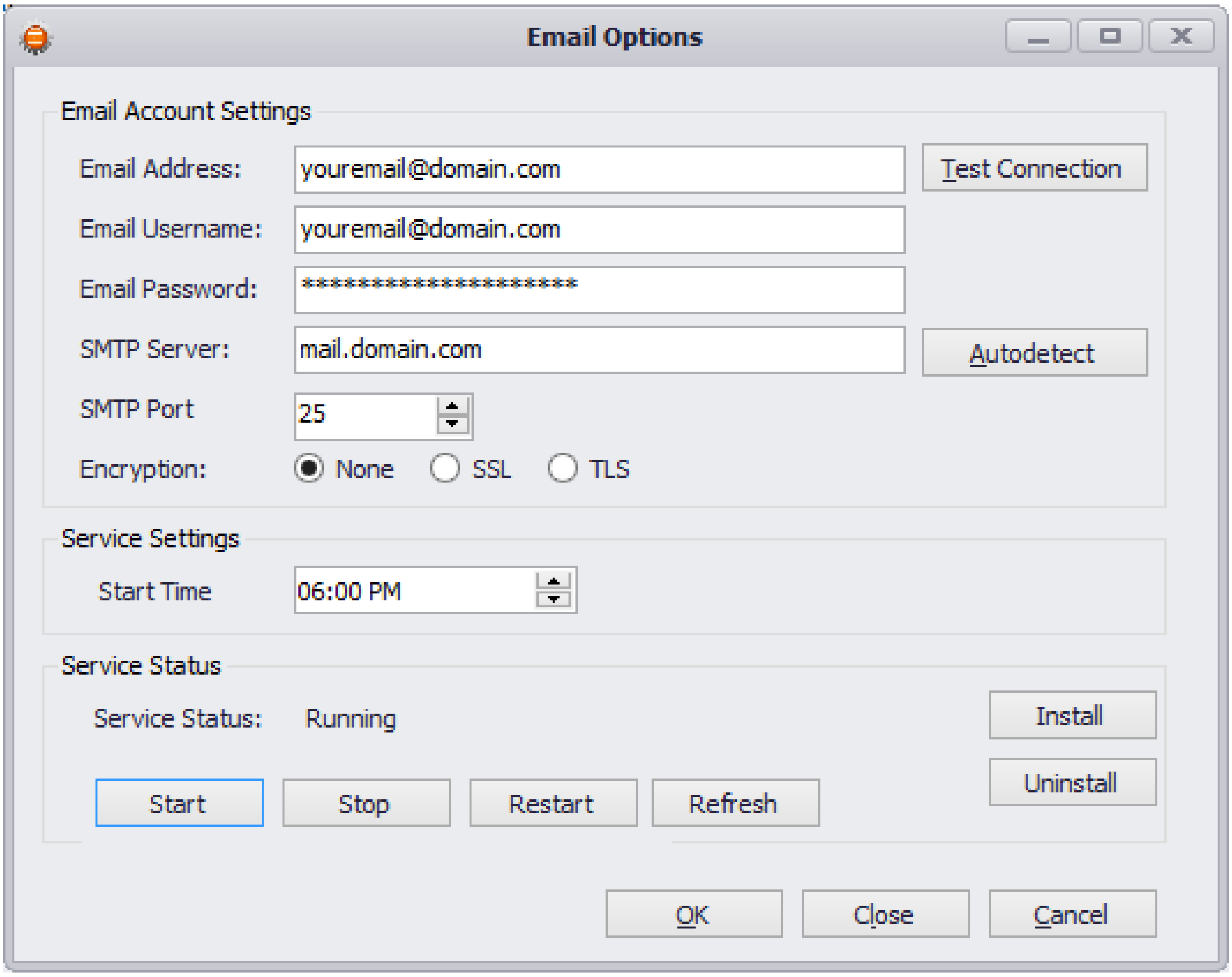
1. Install Knowtifier by running the Knowtifier installer and following the on-screen prompts. If you are upgrading Knowtifier from an older version, you will be prompted to stop the Knowtifier service, in which case, click Yes to continue installation and then manually start the service.
2. After the 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.



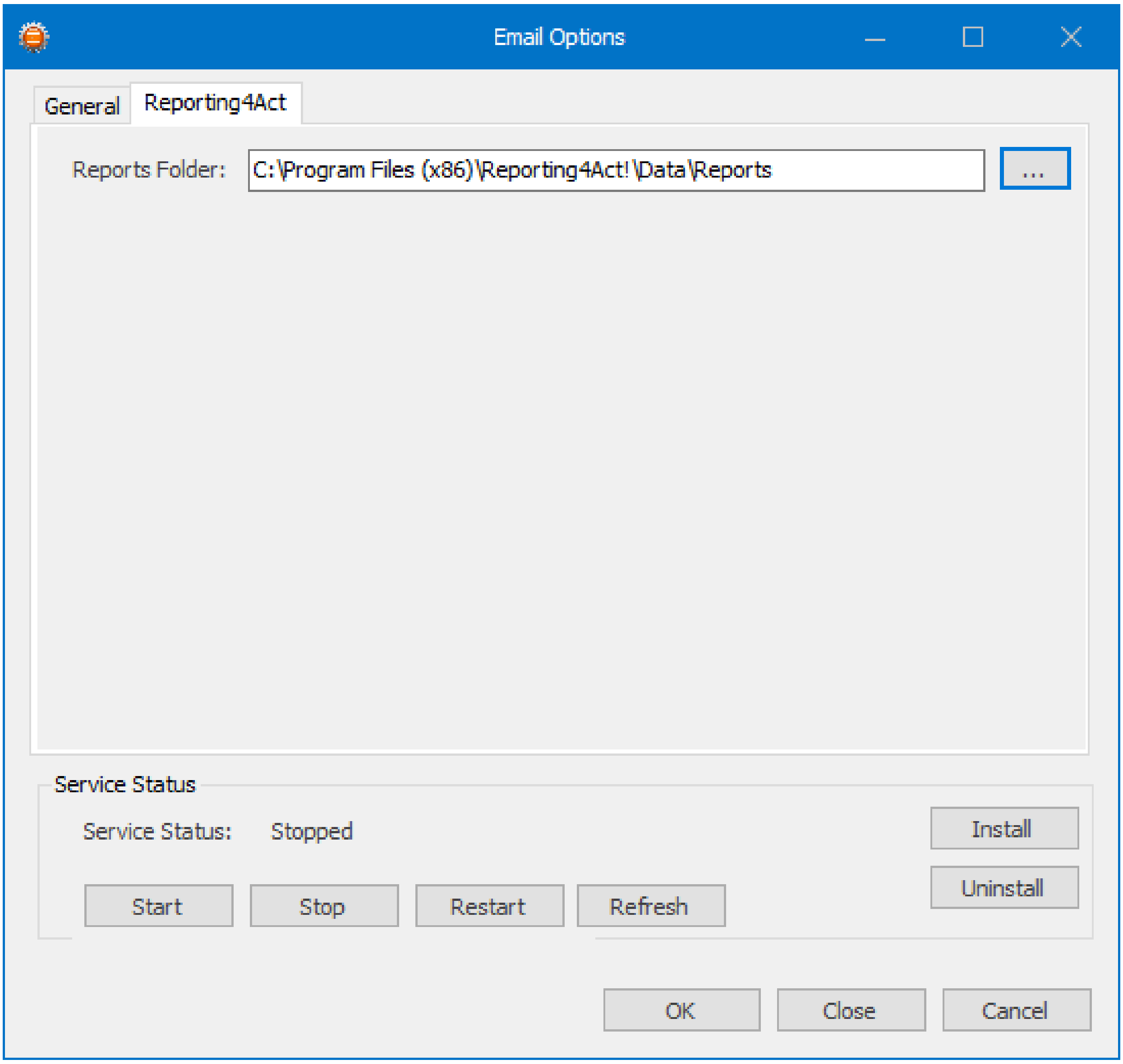
3. If your Act! database is hosted on your computer, navigate to your Act! database's PAD file and then click open.
   Note: If your database is hosted on a different machine (e.g. a server), and you are accessing it over the network, please contact your Act! administrator. Your administrator will be 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 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.



11. If you will be using Reporting4Act with Knowtifier, click **Settings** again and click the **Reporting4Act** tab.
12. Click the Browse button near the **Reports Folder** textbox and browse to your Reporting4Act Reports folder and press OK.
13. Click Apply to save your settings.



Template Configration

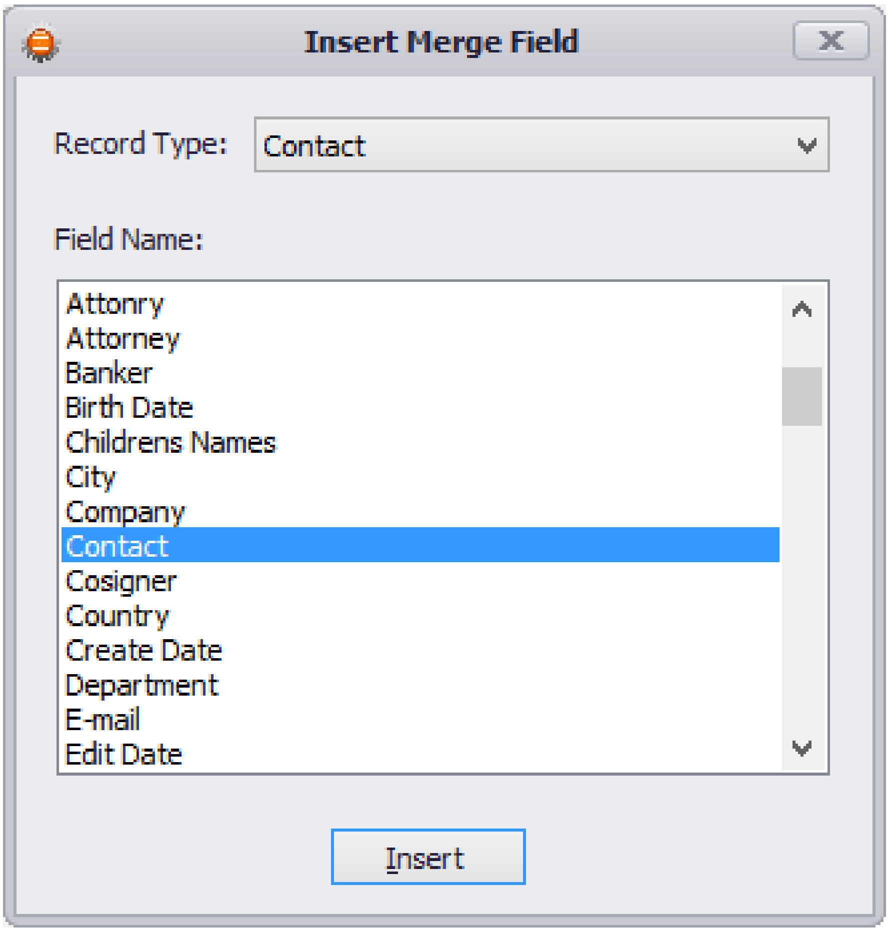
1. Now that you are logged in, you must create a template which will be used to send out the emails to your Contacts. For this example, we will create a birthday reminder email notice.

   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 synching properly to the server.

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

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 and field labelled **Contact** and click the **Insert** button. This will enter a placeholder in your document for the Contact's name and this palceholder 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 accidently 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

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

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