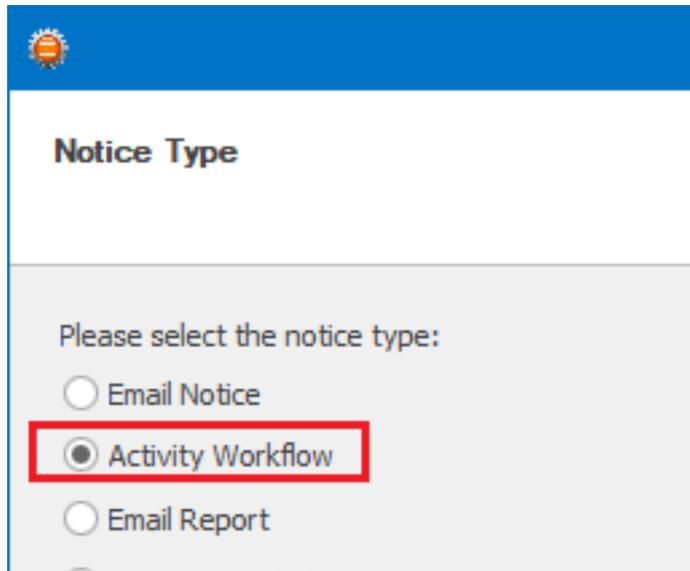


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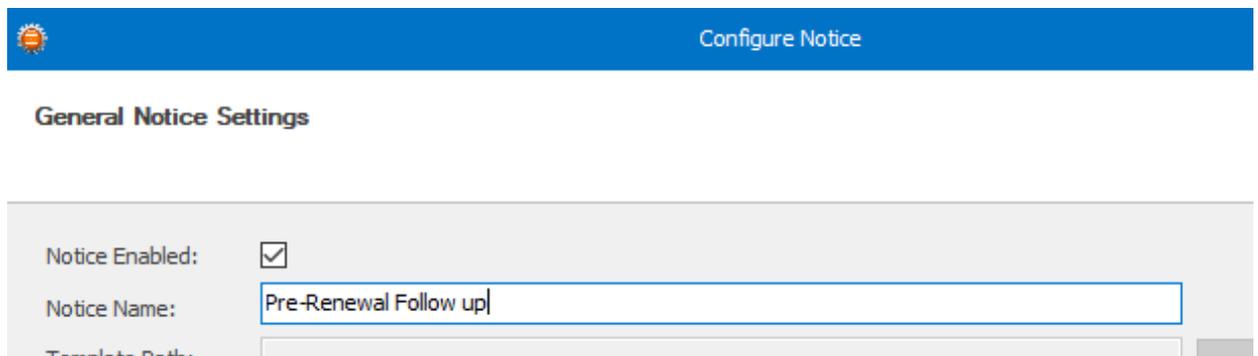
## Creating Activity Workflow notice in Knowtifier

- From the main Knowtifier screen after logging in, click the **Add** button.
- On the **Notice Type** screen, select the **Activity Workflow** option and press Next.



The screenshot shows the 'Notice Type' configuration screen. At the top, there is a blue header with a sun icon. Below the header, the title 'Notice Type' is displayed. A light gray box contains the instruction 'Please select the notice type:'. There are three radio button options: 'Email Notice', 'Activity Workflow', and 'Email Report'. The 'Activity Workflow' option is selected, and its label is enclosed in a red rectangular box.

- Enable the notice by enabling the **Notice Enabled** checkbox.
- Enter a meaningful name in the **Notice Name** textbox. Click Next to continue.



The screenshot shows the 'Configure Notice' screen. At the top, there is a blue header with a sun icon and the text 'Configure Notice'. Below the header, the title 'General Notice Settings' is displayed. A light gray box contains the following fields: 'Notice Enabled:' with a checked checkbox, 'Notice Name:' with a text input field containing 'Pre-Renewal Follow up', and 'Template Path:' with an empty text input field.

- On the Record Settings screen, select the **Record Type** that you wish to use. The Record Type setting depends on where your trigger field is located. If you wish to send out these emails based on a Contact field, such as Birthday; then select Contact. Otherwise, select Opportunity, or Custom Table based on your needs. If you select Custom Table, select a Custom Table from the **Custom Table Name** dropdown.
- In the **Filter Criteria** section, enter any criteria that will be used to exclude unwanted Contacts. Only Contacts that pass the listed criteria will be included in the email blasts. For example in the screenshot below, we are checking a field called "Email Permission". Only Contacts that do not contain the word "Denied" in that field will be included.
- Click the **Preview** button to get a quick count of how many Contacts pass

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the listed filter. Click Next To Continue.

The screenshot shows the 'Configure Notice' dialog box with the 'Record Settings' section expanded. It includes a 'Record Type' dropdown set to 'Contact', a 'Custom Table Name' dropdown, and a 'Filter Criteria' section. The 'Filter Criteria' section contains a table with one row: ( Contact Email Permission Does Not Contain Denied ) And. To the right of the table are buttons for 'Add', 'Edit', 'Move Up', 'Move Down', 'Remove', 'Remove All', and 'Preview'. At the bottom of the dialog are '< Back', 'Next >', and 'Cancel' buttons.

(	Table	Field	Operator	Value	)	And Or	
(	Contact	Email Permission	Does Not Contain	Denied	)	And	Add

- In the **Trigger Settings** section, select the trigger type from the top dropdown menu which will change how the notice will be triggered. We will cover these different Trigger types below.
- **Date Field**
- If your notice will be triggered a certain number of days before or after a date field value in your database, select the **Date Field** option.
- In the **Field Name** dropdown, select the date field that will be used as a trigger.
- Click the **Add** button to add one or more day triggers. If you wish to trigger the notice if the date field value equals to the current date, enter **0** as the Day field value. Repeat this process to add as many triggers as you need. For example, if you are sending out renewal notices, you can add triggers for 30, 14, and 7 days to ensure the customer receives multiple notices of renewal before their service is shut down.

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Configure Notice

### Trigger Settings

Please select how this notice will be triggered

Date Field

Anchor field settings

Select the anchor date field

Field Name: Birth Date

\*\* Note: Only the day and month will be checked for 'Annual Event' fields

This notice will be triggered on the following days before/after the anchor date. \*\*Not required for renewal reports.

Day	Before / After
0	Before

Add

Edit

Delete

< Back Next > Cancel

- **Day of Week**
- If your notice is not based on a Date field and you wish to send it to any Contacts that match the **Filter Criteria** on certain days of the week, select the **Day of Week** trigger type.
- Select the required days from the list below.

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Configure Notice

### Trigger Settings

Please select how this notice will be triggered

Day of Week

Please select the days on which this notice will be triggered. \*\* Not applicable for renewal reports.

<input type="checkbox"/>	Monday
<input type="checkbox"/>	Tuesday
<input type="checkbox"/>	Wednesday
<input checked="" type="checkbox"/>	Thursday
<input checked="" type="checkbox"/>	Friday
<input checked="" type="checkbox"/>	Saturday
<input type="checkbox"/>	Sunday

Select / Deselect All

< Back   Next >   Cancel

- **Date of Month**

- If your notice is not based on a Date field and you wish to send it to any Contacts that match the **Filter Criteria** on certain days of the month, select the **Day of Month** trigger type. From the list select the day of the month you wish the notice to run on. If you always need the notice to run on the last day of the month, select the Last day of month from the list.

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**Trigger Settings**

Please select how this notice will be triggered

Date of Month

Please select the dates of the month on which this notice will be triggered. If the current date does not equal one of the selected dates, the notice will be skipped. \*\* Not applicable for renewal reports.

16  
 17  
 18  
 19  
 20  
 21  
 22  
 23  
 24  
 25  
 26  
 27  
 28  
 29  
 30  
 31  
 Last day of month

Select / Deselect All

< Back    Next >    Cancel

- **Field Change**
- If you wish the notice to run any time a field is changed, select the **Field Change** trigger, and select the field from the **Field Name** dropdown. Note that Field changes are tracked once every 15 minutes.

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The screenshot shows the 'Configure Notice' dialog box with the 'Trigger Settings' section. The title bar reads 'Configure Notice' and has a close button. The main heading is 'Trigger Settings'. Below it, there is a prompt: 'Please select how this notice will be triggered'. A dropdown menu is set to 'Field Change'. Underneath, there is a section titled 'Field change settings' with the instruction 'Select the field whose value will be monitored'. A 'Field Name:' label is followed by a dropdown menu currently showing 'Last Results'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

- Once a trigger is chosen, click Next to continue.
- In the **Additional Actions** section, click the **Add** button in the **Activity Settings** section.

The screenshot shows the 'Configure Notice' dialog box with the 'Additional Actions' section. The title bar reads 'Configure Notice' and has a close button. The main heading is 'Additional Actions'. Below it, there is a section titled 'Activity Settings' with the instruction 'Create an activity when the notice is triggered. Not applicable when sending renewal report'. There are four input fields: 'Activity Type', 'Day', 'Schedule With', and 'Regarding'. To the right of these fields are two buttons: 'Add' and 'Edit'. The 'Add' button is highlighted with a red rectangular box.

- In the day settings area, select the day the activity will be created on from the dropdown.
- Select the **Activity Type** from the dropdown menu.
- Enter a number for the **Start and End Date** fields. This number will be subtracted from the trigger date's value in order to get the new Start/End

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Date. For example, if you are setting up a renewal notice and you are sending out a renewal notice 7 days before the renewal, you can enter 1 in the Start and End Date fields so that an activity is created for 1 day before the renewal date.

- Populate the rest of the activity fields similar to the native Act activity settings and press OK to save this activity setting.

Activity Settings

Day Settings

Select the day on which this activity will be created.

0 days Before  Do not send an email on this day

Activity Settings

Activity Type

Call

Start Date (from anchor date) Start Time:

0 09:00:00 AM  Timeless

End Date (from anchor date) End Time:

0 09:00:00 AM

Alarm (mins)

0  Enable Alarm

Schedule For: Priority: Color:

John Smith  Record Manager High ■ ...

Regarding:

Call regarding renewal

OK Cancel

- Press Next on the Additional Actions screens, and finally click **Finish** to save the notice.
- To save the notice to disk so that the Knowtifier service can load your changes, press the **Apply** button.

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