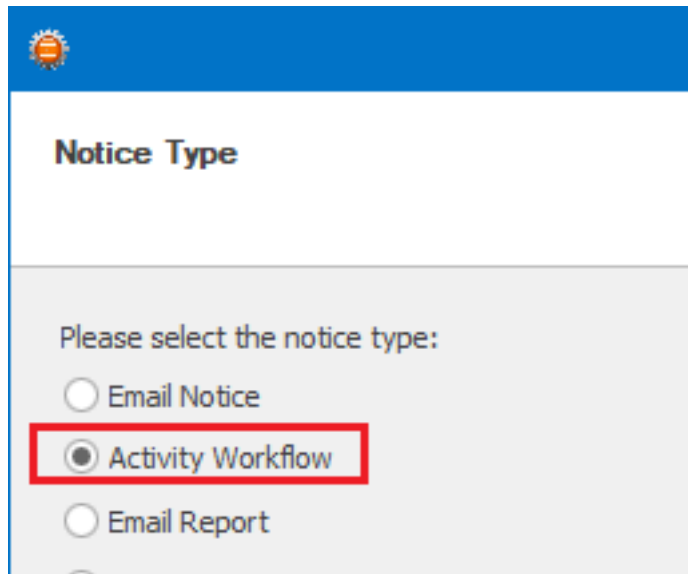


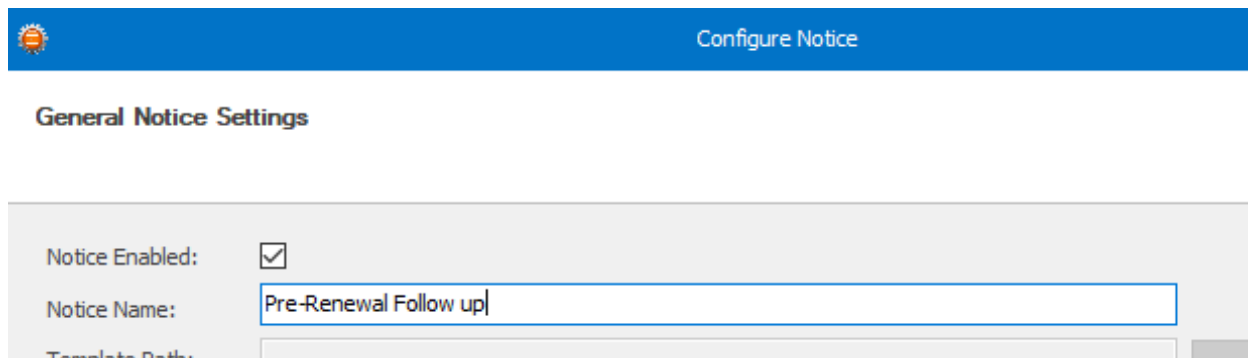
# Knowtifier

## 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.



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



- 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

# Knowtifier

the listed filter. Click Next To Continue.

**Record Settings**

Record Type Settings

Record Type: Contact

Custom Table Settings

Custom Table Name:

Filter Criteria

Use the following section to define additional lookup requirements. Only the records matching the criteria below will be included in the lookup.



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

**Buttons:** Add, Edit, Move Up, Move Down, Remove, Remove All, Preview

**Footer Buttons:** < Back, Next >, Cancel

- 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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**Configure Notice**

**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.

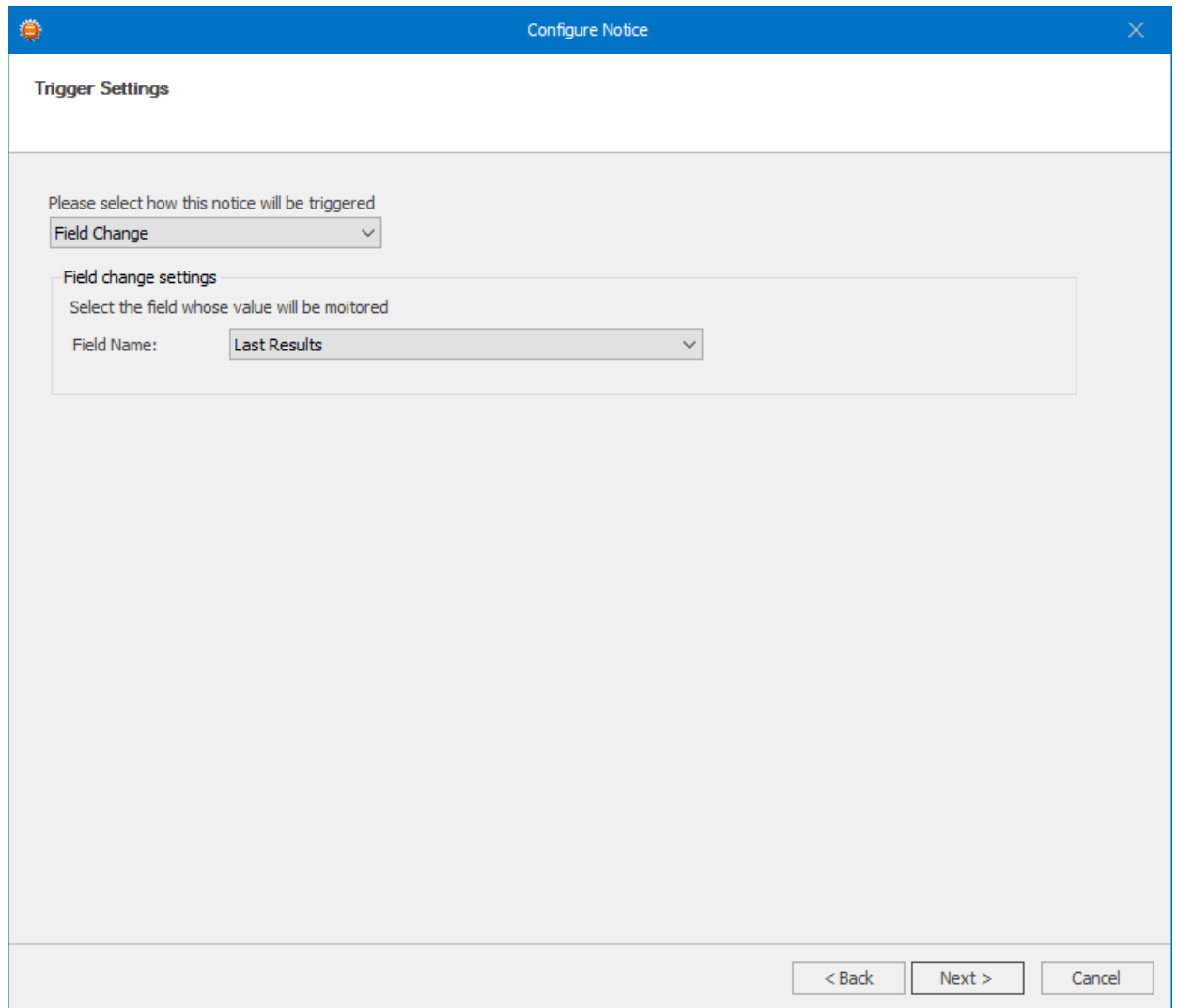
☐ 16  
☐ 17  
☐ 18  
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☐ 23  
☐ 24  
☐ 25  
☐ 26  
☐ 27  
☐ 28  
☐ 29  
☐ 30  
☐ 31  
☒ Last day of month

Select / Deselect All

< Back   Next >   Cancel

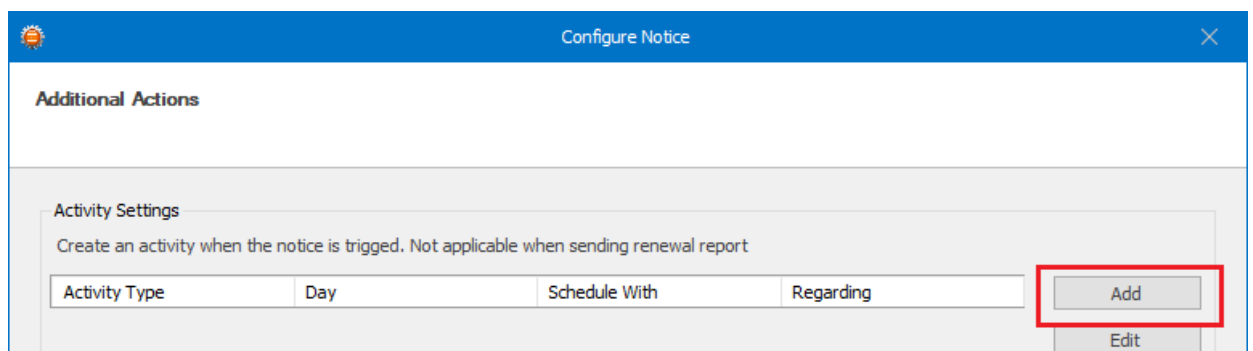
- **Field Change**
- If you wish the notice to run any time a field is changed, select the **Field Change** trigger, and select the field from the **Field Name** dropdown. Note that Field changes are tracked once every 15 minutes.

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The screenshot shows the 'Configure Notice' dialog box with the 'Trigger Settings' tab selected. The dialog has a blue header bar with the title 'Configure Notice' and a close button. Below the header, the 'Trigger Settings' section is visible. It contains a prompt 'Please select how this notice will be triggered' followed by a dropdown menu set to 'Field Change'. Below this is a 'Field change settings' section with the prompt 'Select the field whose value will be monitored' and a 'Field Name:' dropdown menu set to 'Last Results'. At the bottom right of the dialog 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' tab selected. The dialog has a blue header bar with the title 'Configure Notice' and a close button. Below the header, the 'Additional Actions' section is visible. It contains an 'Activity Settings' section with the prompt 'Create an activity when the notice is triggered. Not applicable when sending renewal report'. Below this prompt 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 rectangle.

- 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

# Knowtifier

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) 0 Start Time: 09:00:00 AM ☒ Timeless

End Date (from anchor date) 0 End Time: 09:00:00 AM

Alarm (mins) 0 ☐ Enable Alarm

Schedule For: John Smith ☐ Record Manager Priority: High Color: ■ ...

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.

Unique solution ID: #1050

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