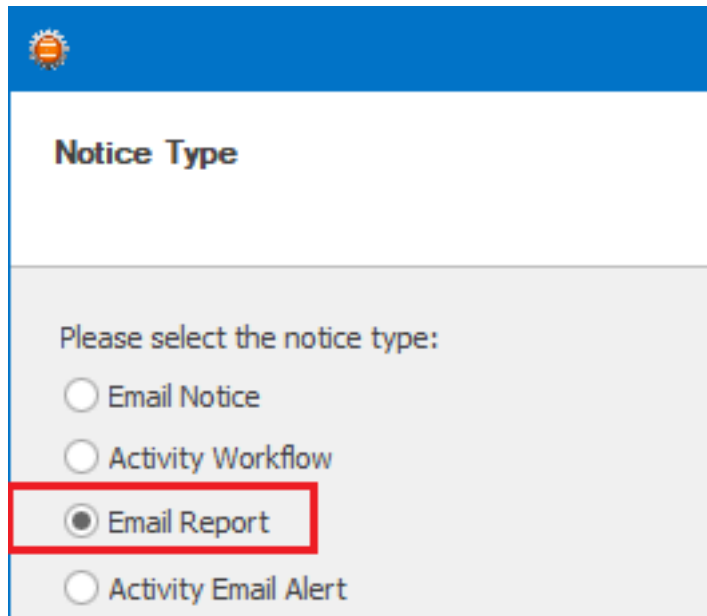


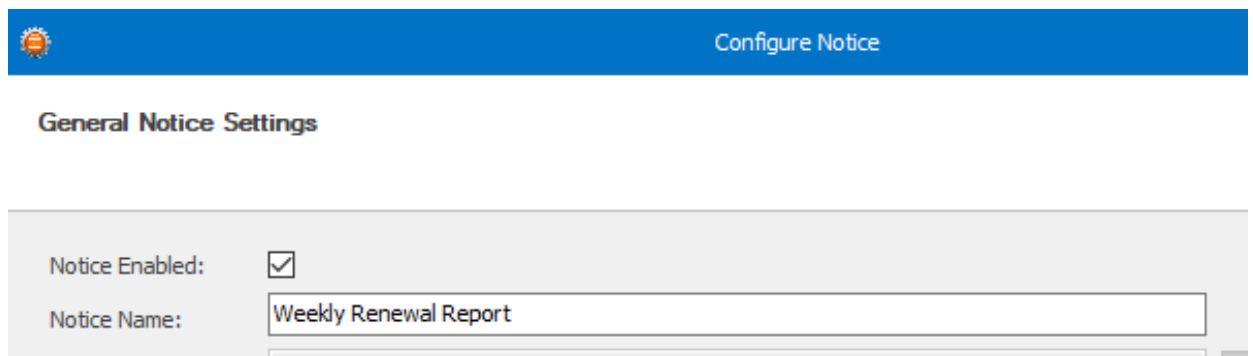
Knowtifier

Creating an Email Report Notice in Knowtifier

- From the main Knowtifier screen after logging in, click the **Add** button.
- On the **Notice Type** screen, select the **Email Report** 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.

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- Click the **Preview** button to get a quick count of how many Contacts pass 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	Add
								Edit
								Move Up
								Move Down
								Remove
								Remove All
								Preview

< 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. If the report does not rely on an anchor date field, enable the **report does not require an anchor date field checkbox**. Enabling this option will mean that the report will include all records that pass the filter criteria defined on the previous page. 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 enter a value of 7 days before, your report will include a

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list of records where the anchor date is 7 days from today.

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.

☐ Monday

☐ Tuesday

☐ Wednesday

☒ Thursday

☒ Friday

☒ Saturday

☐ 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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The screenshot shows the 'Configure Notice' dialog box with the 'Trigger Settings' tab selected. The title bar is blue with a sun icon on the left and a close button on the right. The main content area is light gray. At the top, it says 'Trigger Settings'. Below that, a prompt reads 'Please select how this notice will be triggered'. A dropdown menu shows 'Date of Month'. Another prompt follows: '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.' Below this is a list of dates from 16 to 31, each with an unchecked checkbox. The 'Last day of month' option is checked and highlighted in blue. A 'Select / Deselect All' button is below the list. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

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
☐ 19
☐ 20
☐ 21
☐ 22
☐ 23
☐ 24
☐ 25
☐ 26
☐ 27
☐ 28
☐ 29
☐ 30
☐ 31
☒ Last day of month

Select / Deselect All

< Back Next > Cancel

- Once a trigger is chosen, click Next to continue.
- On the **Email Settings** screen, enter an **Email Subject**. As required, enter any CC or BCC addresses in the provided fields.
- If you wish to change the Reply To address of the email message, enable the **Set "Reply To" Address** checkbox and either enter the email address.

The screenshot shows the 'Configure Notice' dialog box with the 'Email Settings' tab selected. The title bar is blue with a sun icon on the left and a close button on the right. The main content area is light gray. At the top, it says 'Email Settings'. Below that, there are four input fields: 'Email Subject' (containing 'Renewal Report'), 'CC Addresses', 'BCC Addresses', and 'Set "Reply To" Address' (which is unchecked). A small text note below the 'Email Subject' field says 'Leave blank to auto-generate based on the regarding field'. Another note below the 'BCC Addresses' field says '(Separate multiple email addresses with a comma)'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Configure Notice

Email Settings

Email Subject: Renewal Report
Leave blank to auto-generate based on the regarding field

CC Addresses:

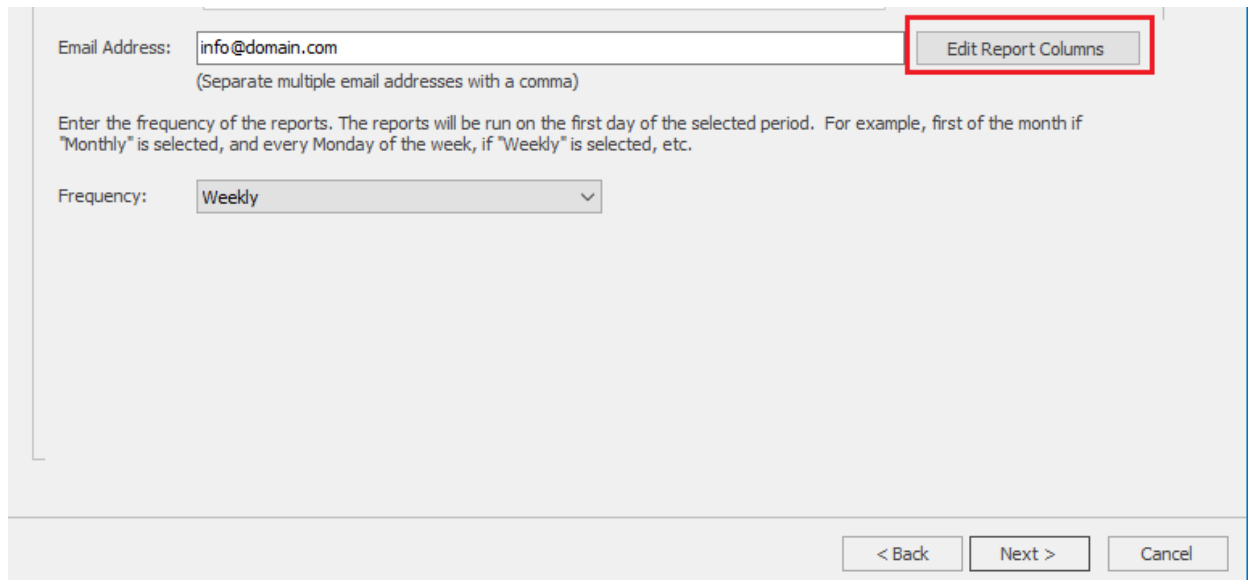
BCC Addresses:
(Separate multiple email addresses with a comma)

☐ Set "Reply To" Address

< Back Next > Cancel

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- In the **Email Address** field, enter the email address of the person that will receive the report.
- Select how often the report will be sent by selecting a value in the **Frequency** dropdown.
- Click the **Edit Report Columns** to show columns of your choice in the report.



The screenshot shows a web-based configuration dialog for a report. At the top, there is an 'Email Address' field containing 'info@domain.com' and a red-bordered button labeled 'Edit Report Columns'. Below this, a note states: '(Separate multiple email addresses with a comma)'. Further down, a text block explains the frequency selection: 'Enter the frequency of the reports. The reports will be run on the first day of the selected period. For example, first of the month if "Monthly" is selected, and every Monday of the week, if "Weekly" is selected, etc.' Below this text is a 'Frequency' dropdown menu currently set to 'Weekly'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

- On the Column Settings dialog, first select the field you wish to display from either the **Contact Field** dropdown, or **Custom Table Field** dropdown if your record type is Custom Table. Click the **Add** button beside the dropdown to add the selected field to your report. You may reorganize the fields by selecting one of the fields and press the **Up** or **Down** buttons. Once satisfied, click OK to save the columns, and press **Next** to continue.

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Column Settings

Contact Field: Birth Date Add

CustomTable Table Field Add

Contact:Company
Contact:Country
Contact:E-mail
Contact:Birth Date

Up
Down
Delete

OK Cancel

- 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: #1051

Author: Ahsan

Last update: 2018-11-21 15:03