

Automatic Web Forms II

for ACT! 2011 and up



User's manual – part 9

Server Triggers

Server Triggers explained.....	2
E-mail to the Submitter.....	2
Internal E-mail Notification.....	2
Ticket Number.....	2
Why is it a server Trigger?.....	3
Contacting support	4

Server Triggers explained

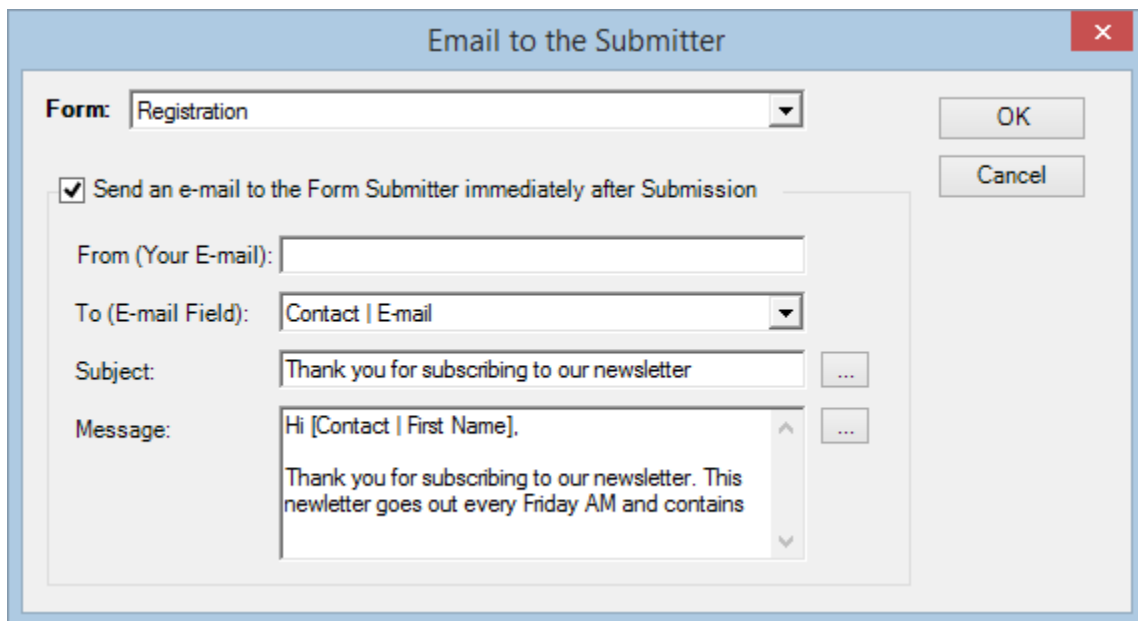
We call Server Triggers, actions that are triggered automatically after the form is submitted.

E-mail to the Submitter

An e-mail may be sent to the person who submitted the form (this feature is not available with all subscription packages).

This e-mail is sent on your behalf and may contain any information you want including data coming from the form itself.

To define the parameters of this e-mail, go to *Forms>Edit Form>Server Triggers>E-mail to the Submitter...*



The screenshot shows a dialog box titled "Email to the Submitter" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Form:** A dropdown menu with "Registration" selected.
- Send an e-mail to the Form Submitter immediately after Submission**
- From (Your E-mail):** An empty text input field.
- To (E-mail Field):** A dropdown menu with "Contact | E-mail" selected.
- Subject:** A text input field containing "Thank you for subscribing to our newsletter" and a "..." button to the right.
- Message:** A text area containing "Hi [Contact | First Name],
Thank you for subscribing to our newsletter. This newsletter goes out every Friday AM and contains" and a "..." button to the right.
- Buttons:** "OK" and "Cancel" buttons are located in the top right corner of the dialog.

Internal E-mail Notification

We already talked about this option in Part 1 of our user's manual.

Ticket Number

You may have the server create a ticket number after each submission (this feature is not available with all subscription packages). A ticket number is made of an automatically incremented number (which may contain leading zeros) and optionally any sequence of characters before, after or both.

For instance, it could look like 46, 0000046, REQ-00046, 000046-FQ, REQ-000046FG.

You may define the settings of this ticket number under *Forms>Edit Form>Server Triggers>Ticket Number....*

The screenshot shows a dialog box titled "Ticket Number Settings". At the top left, there is a dropdown menu labeled "Form" with "Registration" selected. To the right of this are "OK" and "Cancel" buttons. Below the "Form" dropdown is a checked checkbox labeled "Create a Ticket Number after each submission". Underneath this checkbox are three input fields: "Next Number to be used:" containing "00046", "Syntax:" containing "REQ-[#]", and "Target Field:" with a dropdown menu set to "Number".

This window should be self-explanatory. The syntax needs to include the placeholder for the Next Number to be used. This placeholder is [#].

Why is it a server Trigger?

The ticket number is created at the time the form is submitted and not when the record is successfully imported into Act!. The reason for this is that we want you to be able to include it in the Email to the Submitter or in the Thank you message displayed directly in the form.

In the example above, we have assigned the Ticket number to the field named *Number* in our Act! database. Therefore, the [Number] field placeholder is now available in the list of field available to be inserted in the subject and message of the E-mail to the Submitter.

The screenshot shows a window titled "Subject". On the left, there is a "Subject:" label followed by a text box containing "Registration Request". To the right, there is a "Fields:" label followed by a dropdown menu. The dropdown menu is open, displaying a list of fields: "First Name", "Last Name", "E-mail", "Birth Date", "ID/Status", "Last Results", "State", and "Number". The "Number" field is highlighted with a blue background, and a mouse cursor is pointing at it.

Email To Submitter [X]

Form: Registration

Send an e-mail to the Form Submitter immediately after Submission

From (Your E-mail): mail@example.com

To (E-mail Field): E-mail

Subject: Registration Request [Number] has been submitted suc ...

Message: Hi [First Name],
Your subscription has been received and it has been assigned the number [Number] which you should keep for future reference. ...

OK

Cancel

Contacting support

Support is provided through our ticket system at <http://support.exponencial.com>.

Rev. Aug. 5, 2015 - v.5.1.0.0