

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". At the top left, there is a "Form:" dropdown menu with "Registration" selected. Below this is a checked checkbox with the text "Send an e-mail to the Form Submitter immediately after Submission". There are four input fields: "From (Your E-mail):" (empty), "To (E-mail Field):" (dropdown menu with "Contact | E-mail" selected), "Subject:" (text box containing "Thank you for subscribing to our newsletter" and a "..." button), and "Message:" (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). On the right side of the dialog, there are "OK" and "Cancel" buttons.

Internal E-mail Notification

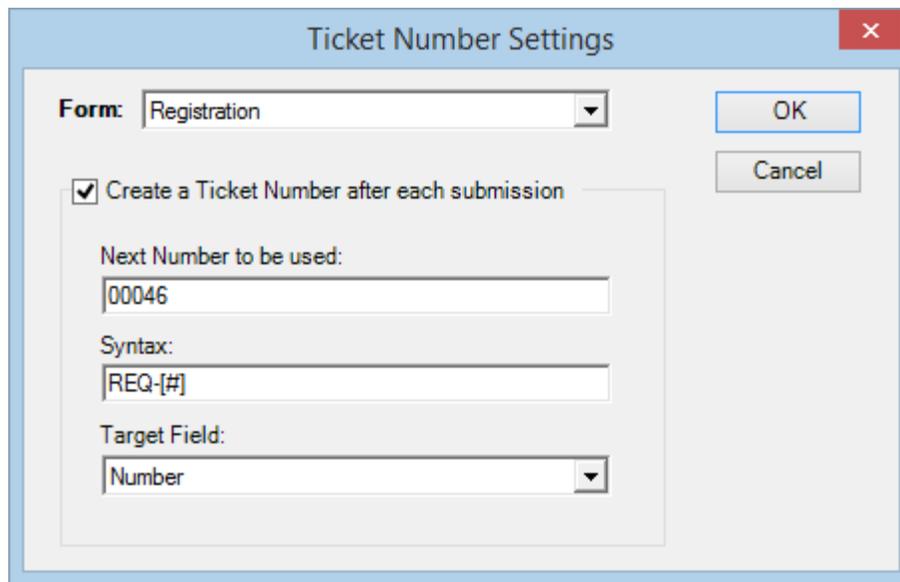
We already talked about this option in Part 1 of our user's manual.

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....*



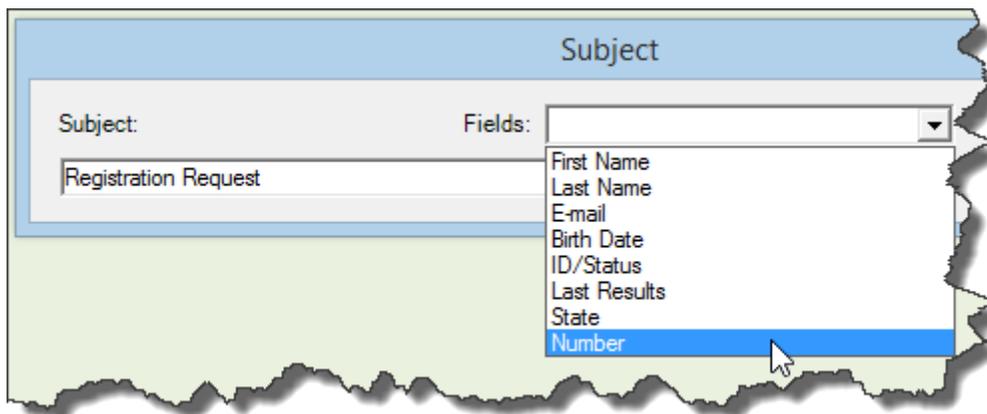
The screenshot shows a dialog box titled "Ticket Number Settings". At the top left, there is a "Form:" dropdown menu with "Registration" selected. To the right are "OK" and "Cancel" buttons. Below this, a checkbox labeled "Create a Ticket Number after each submission" is checked. Underneath, there are three input fields: "Next Number to be used:" with the value "00046", "Syntax:" with the value "REQ-[#]", and "Target Field:" with a dropdown menu showing "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 configuration window for an email subject. The title is "Subject". On the left, there is a "Subject:" label and a text box containing "Registration Request". On the right, there is a "Fields:" label and a dropdown menu. The dropdown menu is open, showing a list of fields: "First Name", "Last Name", "E-mail", "Birth Date", "ID/Status", "Last Results", "State", and "Number". The "Number" field is highlighted in blue, and a mouse cursor is pointing at it.

Email To Submitter

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 by e-mail at support@exponencial.com.

Rev. Aug. 5, 2015 - v.5.1.0.0