Act! Smart Tasks

Working Smarter with Smart Tasks

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Introduction

Smart Tasks are a series of common and connected steps, such as those in a workflow, that automatically perform key tasks or actions for contacts or opportunities. Smart Tasks are ideal for automating routine tasks. You can use Smart Tasks to create processes that help you work smarter and reduce the time spent on manual repetitive tasks.

Benefits

- Automate key activities with Smart Tasks to help handle everyday details, such as sending emails for you or putting activities on your calendar.
- Use pre-defined templates for common activities.
- Apply right out-of-the-box or edit to personalize.
- Suitable for general productivity or sales efforts.
- Easy-to-use visual designer lets anyone create or manage Smart Tasks.
- Control the timing, contact lists, and opportunities for each Smart Task.

Automate key activities with Smart Tasks to help handle everyday details.

Comparing Smart Tasks to Activity Series

Smart Tasks and activity series are similar because you can automatically schedule a series of related activities (steps) for a workflow task. However, Smart Tasks can run automatically based upon completion of the previous step. Activity series steps are based on an anchor date and not upon completion of the previous step. The following table shows the features for each.

Feature	Activity Series	Smart Tasks
Create/edit templates	x	x
Delete my templates	x	x
Delete other users' templates	x	x
Manually run/schedule	x	x

Feature	Activity Series	Smart Tasks
Automatically run/schedule		x
Schedule emails to be sent		x
Add custom third-party steps to templates		x
Drag and drop steps within a template		x
Trigger activities to begin upon completion of a previous step (set Time Delay step)		x
Assign steps to the Record Manager		x
Assign steps to a predetermined contact		x
Preview steps before they are scheduled/sent		x
Run in the background		x
Run when Act! is closed or user is not logged on (offline Smart Tasks)		x
Update data in a selected contact or opportunity field		x

Smart Task Components

Before you create a Smart Task, you should understand its parts.

- **Template** – Templates organize the connected steps within a Smart Task. A template can have one or more steps.
- **Trigger** – Triggers tell the Smart Task how or when to run. You can run a Smart Task manually, at a scheduled time, or when conditions are met.
- **Conditions** – Conditions define what records (contacts or opportunities) the Smart Task should run against.

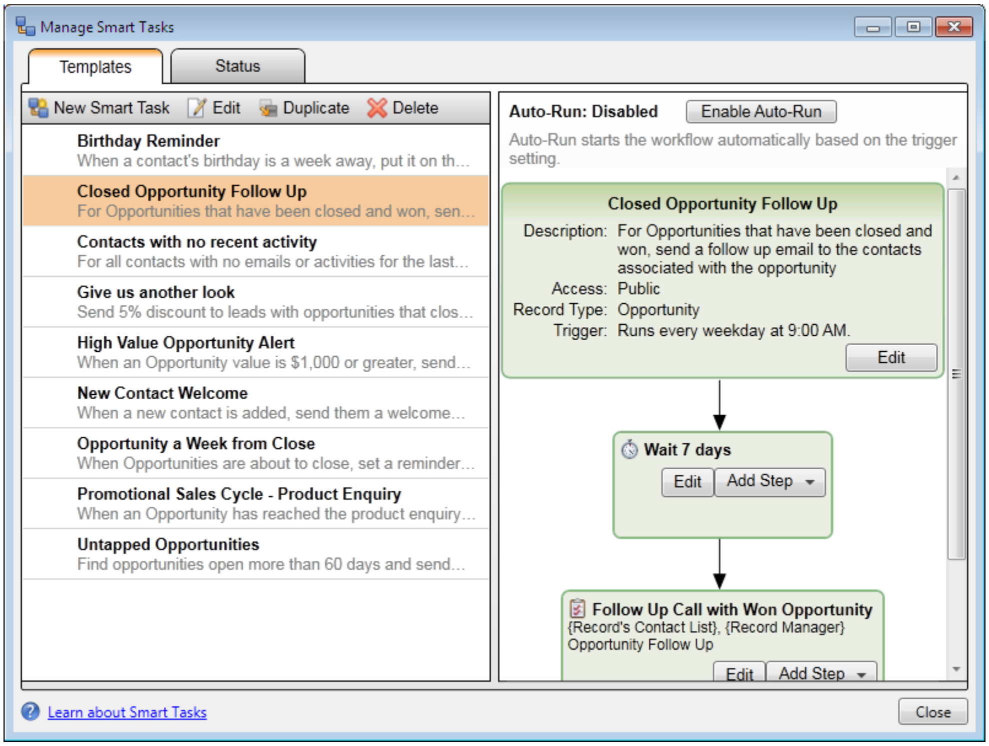


Figure 1: Manage Smart Tasks dialog box

When working with templates, the workflow appears in the right pane of the Manage Smart Tasks window. A workflow has a top-level box that shows details about the Smart Task and lower-level boxes that contain the steps of the workflow. You create and manage the steps of the workflow in the right pane. You can drag-and-drop steps in the Smart Task using the right pane.

Planning a Smart Task

Ask yourself what you want to do. Plan ahead. Then, review the default templates. You may be able to save time editing an existing template rather than creating a new one. The default templates can also be used as a guide when creating your own templates.

There are some steps in a Smart Task that cannot be edited once created, so decide how you want the workflow to perform before you create it. Editing is not always available because changes you make to a Smart Task do not apply to steps of the Smart Task already running against records. If you do edit a Smart Task, you can cancel and re-run the in-progress steps, but this may cause duplicated actions.

Default Templates

New Contact Welcome - When a new contact is added to the database (based on Create Date), the step sends a welcome email message. The contents of the email message are set up in the Smart Task step. The trigger is set to run the Smart Task every weekday at 9:00am.

Contacts With No Recent Activity - If a Record Manager has not had any emails or activities with a contact in the last 90 days, the step will schedule an activity for the Record Manager to follow up with the contact. The trigger is set to run the Smart Task every weekday at 9:00am.

Birthday Reminder - When a contact's birthday is a week away, the step will schedule a to-do reminder on the user's calendar. The trigger is set to run the Smart Task every weekday at 9:00am.

High Value Opportunity Alert - For an opportunity with a value of $1,000 or greater, the step sends an email to the Record Manager. The trigger is set to run the Smart Task every weekday at 9:00am.

Opportunity A Week From Close - When an opportunity is set to close based on the estimated close date of the next seven days, the step will schedule a to-do reminder for the Record Manager to follow up with the contact. The trigger is set to run the Smart Task every weekday at 9:00am.

Closed Opportunity Follow Up - When an opportunity's status is set to Closed-Won, seven days after close (time delay step), schedule a follow up call for the Record Manager to call the contacts associated with the opportunity. The trigger is set to run the Smart Task every weekday at 9:00am.

Promotional Sales Cycle - Product Inquiry - When an opportunity has reached the Product Enquiry stage of the Promotional Sales Cycle, the steps of this Smart Task will schedule a to-do reminder to collect product information, send an email, wait three days, and then schedule a meeting with the contacts associated to the opportunity. The trigger is set to run the Smart Task every weekday at 9:00am.

Creating a Smart Task

The following sections describe the steps you need to take to create a Smart Task. The process for creating a Smart Task is:

- Create a template.
- Define record type and triggers.
- Define conditions.

Create a Template

A Smart Task template contains all the information in the Smart Task workflow.

1. On the **Schedule** menu, click **Manage Smart Tasks**.
2. From the **Templates** tab, click **New Smart Task**.
3. In the **Smart Task Name** field, type a brief but descriptive name for the template.
4. In the **Description** field, type information to describe the template.
5. Select **Public** or **Private** to allow or restrict other users to access the template.
6. Set the record type, trigger, and conditions as detailed in the following sections.

Define Record Type and Triggers

You cannot change the record type or trigger when you edit or duplicate a Smart Task template. Ensure you select the correct record type and trigger when you create the template or you will need to delete and recreate it.

1. In the Smart Task template **Record Type** list, select if you want to run this Smart Task on Contact or Opportunity records.

2. In the **Trigger** list, select when the Smart Task should run.

    a. **Run manually only** – You must manually start the Smart Task each time you want it to run.

    b. **Run at scheduled time** – You can define when, how often, and under what conditions you want the Smart Task to run. Once a frequency is selected and you save the template, this schedule cannot be changed. However, you can run the Smart Task against manually selected records or disable it from automatically running.

    c. **Run when conditions are met** – You define the data conditions that must be met for the Smart Task to run.

3. If the Smart Task is set to Run at a scheduled time, select the time and frequency you want it to run.

4. If the Smart Task is set to Run at a scheduled time or Run when conditions are met, define the query conditions that will be used to trigger the Smart Task as detailed in the following section.

Define Conditions

You can open a saved query that you created to find contact or opportunity records (Lookup > Advanced > Advanced Query) and use that query in a Smart Task. You can use the query as-is or edit it for the Smart Task.

1. In the **Conditions** section, click **Edit Conditions** to add new query conditions that will be used to trigger the Smart Task. Alternatively, you can open an existing query using File > Open.

2. From the **Type** list, select the type of record (Contact, Opportunity, or Opportunity Product) for the Smart Task to run against.

3. From the **Field Name** list, select the field to run the Smart Task against.

4. From the **Operator** list, select a condition that will be used to limit or focus the data in the query.

5. In the **Value** field, type or select the specific data you are looking for. For example, to create a query of all contacts that have an ID/Status of Lead, use the following criteria.
    a. Type: Contact
    b. Field Name: ID/Status
    c. Operator: Equal To (=)
    d. Value: Lead

6. Click **Add to list**.

7. To add another condition to the query, repeat steps 1-6.

    a. After adding another condition, select the first row in the list.

    b. In the And/Or column click the drop-down arrow and select one of the following:
        - **And** – the records must match both conditions
        - **Or** – the records must match one of the conditions

    b. To enclose conditions in parentheses, click in the parentheses column and select an item in the list. Conditions enclosed in parentheses are processed first in the query search.

8. Click **Preview**. Verify the results meet your expectations based on the specified conditions. If the number of records does not seem correct, edit the conditions.

9. Click **OK**.

10. In the **Edit Smart Task** dialog box, select the **Run only once for any record** check box if you want the Smart Task to run against a record only once *per user*.
    This option prevents a Smart Task from being run against the same record multiple times by the same user. Other users can still run the Smart Task against the same record if the Smart Task is Public.

    TIP
    To prevent multiple users from running a Public Smart Task against the same record, you can do the following. 1. Create a custom field in the contact or opportunity record. 2. Have the Smart Task set a value in this custom field. For example, when the Smart Task runs it sets the value to True. 3. Set the Smart Task conditions to exclude records based on the value in the custom field. For example, exclude the record when the value of the custom field is True. This works like the Run only once for any record setting because it excludes records that have already been handled by the Smart Task.

11. Click **OK**.

12. In the **Manage Smart Tasks** window, select **Enable Auto-Run** if you want the template to run automatically.

Add Steps

Steps define the actions you want to have the Smart Task automatically perform, such as scheduling an activity or replacing the contents of a field when conditions are met.

Time Delay

Use Time Delay to select a time frame when the next step in the workflow should start based on when the previous step completes.

1. Click the **Click here to add a step** drop-down arrow and select **Time Delay**. If you are adding a step between two existing steps, use the **Add Step** drop-down arrow.
2. Use the spinner and drop-down box to set the time delay.
3. Click **OK**.

Schedule Act! Activity

Use Schedule Act! Activity to automatically schedule an appointment, call, meeting, or to-do.

Note: Steps scheduled after an activity will not trigger until the activity is cleared. If the activity is cancelled, every step after the activity in the Smart Task workflow is also cancelled. The activity must be completed for other Smart Task steps to run.

1. Click the **Click here to add a step** drop-down arrow and select **Schedule Act! Activity**. If you are adding a step between two existing steps, click the **Add Step** drop-down arrow.
2. In the **Step Name** field, type a name for the step.
3. Select the **Automatically schedule activity without prompting the user** option if you do not want to view the Schedule Activity dialog box when this step is triggered.
4. Select an **Activity Type** from the list.

5. Use the **Start Date** arrows to select the number of days between the date that the step is triggered and the date that the activity should be scheduled to start.

6. Use the lists to select a **Start Time** and **Duration**. For a timeless activity, select Timeless.

7. To have a banner for a timeless activity appear on your calendar, select **Use Banner**.

8. Click the **Schedule With Select** button and select the contact or contacts you want to attend the activity. Select one or more of the following:
   - **Select Contacts** - Allows you to select one or more contacts.
   - **{Contact}** - The contact selected when the Smart Task is started.
   - **{Record's Contact List}** - The contacts associated with the selected opportunity when the Smart Task is started.
   - **{Record Manager}** - The user or users responsible for managing the records selected when the Smart Task is started.
   - **{Smart Task User}** - The user who started the Smart Task.

9. Select the **Send invitation e-mail** check box to send an iCalendar message with the activity information to the attendees.

10. To associate a group, company, and opportunity with the activity, click the browse button (...) next to the **Associate With** field. Select a group, company, and opportunity. Click **OK**.

11. In the **Regarding** field, type a description for the activity.

12. Set the **Resources**, **Location**, **Priority**, and **Schedule For** information as appropriate.

13. Select the **Private** check box to make the activity private so that other users cannot access it (except those the activity is scheduled with). This setting takes precedence over your “Make new activities public”

preference. This means, if your preference is to make new activities private and you run a Smart Task that creates a public activity, the resulting new activity will be public. You can change this option when you Preview the step before running it.

14. If necessary, use the **Details** tab to add additional information or attach a file.

15. Click **OK**.

Send E-mail

Use Send E-mail to send an Outlook® email message. You must have Outlook set up as your email system and editor to use this step type. You cannot use the Act! E-mail Editor for send email steps.

1. Click the **Click here to add a step** drop-down arrow and select **Send E-mail**. If you are adding a step between two existing steps, click the **Add Step** drop-down arrow.

2. Select the **Automatically send e-mail without prompting the user** option if you do not want to preview the email before it's sent.

   Preview requires the user to preview and approve every email that is sent with this Smart Task. You may want to consider using preview only when testing the Smart Task because if you run the Smart Task against a large set of records, this may take a long time to preview each record and decide whether to send it.

3. Use the **Contacts** button to select who should receive the email.
   - **Select Contacts** - Allows you to select one or more contacts.
   - **{Contact}** - The contact selected when the Smart Task is started.
   - **{Record's Contact List}** - The contacts associated with the selected opportunity when the Smart Task is started.

- **{Record Manager}** - The user or users responsible for managing the records selected when the Smart Task is started.
- **{Smart Task User}** - The user who started the Smart Task.

4. In the **Subject** box, type the email subject that will appear in the email when it is sent.

5. To attach a file to the email, click the **Browse** button and select it.

6. In the **Message** box, type the text that will appear in the email message.

7. To set or clear additional email options, click the **More Options** arrow and select email options and/or the information to be saved as history.
   The email options (Send as HTML, Request Read Receipt, and Make history private) have three states to the check box: Solid fill - Inherits your email preference settings; Check mark - On; Blank - Off. You can change these options if you Preview the step before running it.

8. Click **OK**.

Update Field

Use Update Field to automatically update data in one or more fields in contact or opportunity records when defined conditions are met. Because you are changing data, you should consider making Smart Tasks that contain this step Private.

1. Click the **Click here to add a step** drop-down arrow and select a step type. If you are adding a step between two existing steps, click the **Add Step** drop-down arrow.

2. In the **Step Name** field, type a step name.

3. Select **The Automatically update this field without prompting the user** if you want to run the step without user interaction.
   If you do not select this option, before the step can proceed in the Smart Task, a user must preview it and select to run it. If you run the Smart Task

against a large set of records, this may take a long time to preview each record and decide whether to make the change.

4. In the **Update contents of field**, select a field.

5. In the **With value** field, type the new contents for the field.

6. Click **OK**.

Running a Smart Task

For a Smart Task to run automatically, it requires:

- A selected trigger, such as the "Run at a scheduled time" trigger with a defined frequency, or the "When conditions are met" trigger.
- Conditions defined that specify which records the Smart Task should run against.
- The Auto-Run option is enabled for the Smart Task. Each user, if there are multiple users in the database, can enable a Smart Task to Auto-run.

The following settings determine how and when the Smart Task should run.

- **Run Only Once** – This option (set in the New Smart Task or Edit Smart Task dialog box) prevents the Smart Task from being run over and over again by the same user against the same record if the record continues to meet the defined conditions. For example, if you have a Smart Task that automatically schedules an activity with a contact that has an opportunity over $1,000, you do not want that contact to receive multiple activity requests. This option is not enforced when the Smart Task is manually run unless you select the option to apply the defined conditions.

- **Auto-run** – This option (set in the right pane of the Manage Smart Tasks dialog box) enables the Smart Task to automatically run based on the defined trigger settings.

You can disable or enable the Auto-Run feature to determine if a Smart Task should run automatically. If disabled, the Smart Task will not run automatically even if the trigger conditions are met.

- **Run Offline** – Offline Smart Tasks (set up on the Tools > Set Up Offline Smart Tasks) will run independently when Act! is closed or when the user assigned to the Smart Task is offline. You need a Simple Mail Transfer Protocol (SMTP) server to handle outgoing mail notifications for the offline user. If you do not set up offline Smart Tasks, Smart Tasks will not run unless the user is logged into the Act! database.

The following table shows the results you get when "Run only once for any record" and "Auto-Run" settings are used for a Smart Task.

Trigger	Conditions	Run only once for any record	Auto-Run	Result
Run at scheduled time • Daily • Every Weekday • Time - 8:00 AM	Contact email Contains Data	Not selected	Enabled	Each weekday at 8:00 AM, the Smart Task runs against all contacts with an email address.
Run at scheduled time • Daily • Every Weekday • Time - 8:00 AM	Contact email Contains Data	Selected	Enabled	Each weekday at 8:00 AM, the Smart Task runs against any new contacts with an email address or any existing contacts with an email address added since the last time the Smart Task ran.
Run at scheduled time • Weekly • Every 2 Weeks on Monday • Time - 12:00 PM	Contact email Contains Data	Selected	Disabled	The Smart Task will not run automatically, but can be run manually.

When you create the Smart Task template, the template settings and auto-run option will automatically run the Smart Task as scheduled. If you created a Smart Task that does not run on a schedule, you must manually run the Smart Task. Manual Smart Tasks make sense for tasks you do not need to do very often, or when you want to run a scheduled Smart Task outside of its scheduled run. For example, you may have a Smart Task created to send an email to managers every week. This week, however, you are going on vacation before the Smart Task is scheduled to run, so you can run it manually before you leave.

Manually Running a Smart Task

If your Smart Task does not contain conditions for the records it should run against, you can run the Smart Task for a group or company by creating a list of records using a lookup. Then, run the Smart Task on the records in the lookup.

1. Select the record or records you want to run the Smart Task on. Or, if you are running a Smart Task with conditions, start with step 2.
   The Smart Task only runs against records that meet the defined conditions. For example, if you have selected 20 contacts, but only 15 meet the conditions, only those 15 records will have the Smart Task applied to them.

2. On the **Schedule** menu, click **Run Smart Task**.

3. In the dialog box that appears, do the following:

   a. Select a Smart Task from the list.

   b. Under **Apply To**, keep the default setting for the record selection or change it.

      By default, the option for the records to run the Smart Task against matches your initial record selection. This means, if you selected a single record, the option defaults to Selected [Contacts][Opportunities].

If you selected a Smart Task that has defined conditions and you want to apply those conditions to the selected records, ensure the **When manually running the selected Smart Task, apply the defined conditions** check box is selected. Otherwise, clear the check box.

   c. Click **Run**.

4. Review and proceed through any notifications or prompts by clicking **OK**.

Viewing and Managing Smart Tasks Status

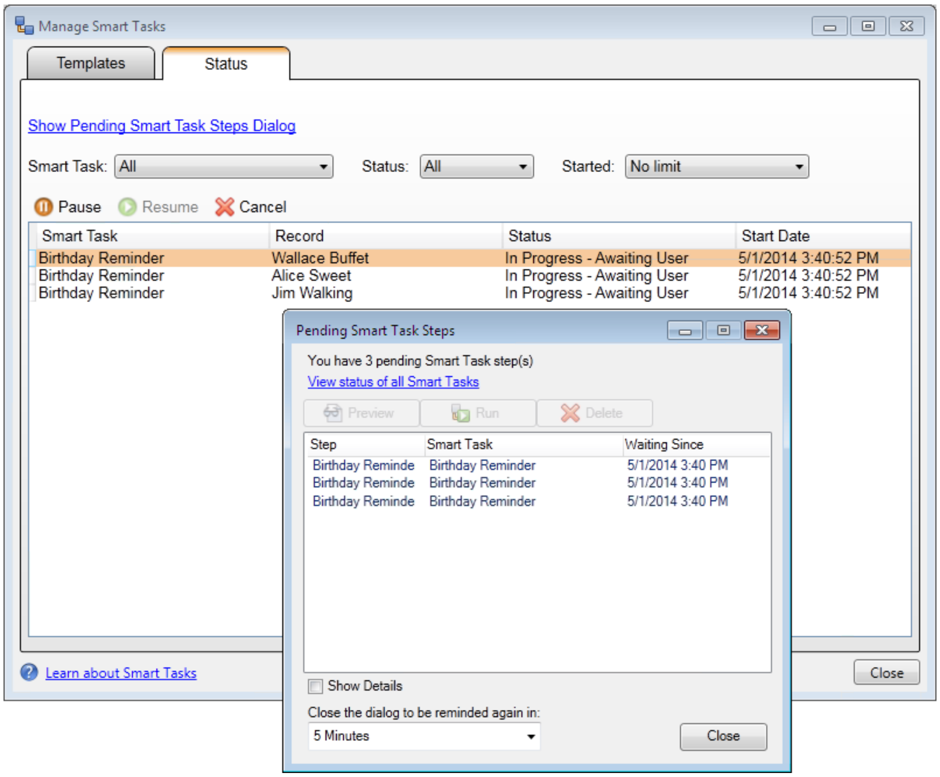
Once a Smart Task is scheduled, you can:

- View its status
- Pause it
- Cancel it

Pending Smart Tasks

Depending on the Smart Task step settings, the Pending Smart Task Steps dialog box may open. You can preview a step before it runs if the template specifies that the step should display before running. The dialog box also opens when a Smart Task step is scheduled to start.

Note: Smart Tasks will remain In Progress until all steps are completed, including the completion (clear or erase) of any calendar activity initiated by the Smart Task.



1. On the **Schedule** menu, click **Show Pending Smart Task Steps**.

2. In the grid, select the step.

3. Click **Run** or **Preview**.

4. If you Preview the step, do one of the following. Make sure you click **Send** or **OK** to activate the step after previewing it. If you cancel or close the dialog box, the step is cancelled.

   - **Send E-mail step**- The message window opens with the recipient's name in the To field. Make any changes and click **Send** to send the email.

   - **Schedule Act! Activity step**- The Schedule Activity dialog box opens with the information that was set when the step was created. Make any changes and click **OK** to schedule the activity.

- **Update Field step** - The dialog box opens showing the selected field and replacement value. Keep the original selections or make changes. Click **OK**.

5. After the step runs it is cleared from the queue.

Offline Smart Tasks

If a Smart Task is scheduled, it will not run unless the user is logged on to Act!. If you want to run Smart Tasks automatically whether you are logged on to Act! or not, set up offline Smart Tasks. With offline Smart Tasks, Act! does not need to be open for the Smart Task to run. Only the computer hosting the database must be on. However, if a Smart Task has a step that requires user interaction to proceed, when you log on, you are notified of pending steps.

When you enable offline Smart Tasks, Time Delay, Schedule Act! Activity, and Update Field Smart Tasks will run offline. To enable Send E-mail Smart Tasks to run offline, you must provide Outgoing Mail Server information.

1. On the **Tools** menu, click **Set Up Offline Smart Tasks**.
2. Select the **Enable Offline Smart Tasks** check box.
3. To set up a Simple Mail Transfer Protocol (SMTP) server that will send outgoing email notifications to the user assigned to the Smart Task, do the following:
   Each database needs information for only one SMTP server for all users.
   a. Enter the full address/name of the **SMTP server**.
   b. By default, the port number for outgoing email is 25. If you want to use another port, enter the port number.
   c. If the SMTP server supports Secure Sockets Layer (SSL) encryption, select the **Use SSL** check box. If the SMTP server requires authentication, enter the account name and password.

If you want to run Smart Tasks automatically whether or not you are logged on to Act!, set up offline Smart Tasks.

d. To ensure the Smart Task can connect to the SMTP server, in the **Test e-mail address** field, type a valid email address. Then, click **Test Connection**.

e. This action attempts to send a test email and provides a Success or Fail message.

f. Click **OK**.

Conclusion

Let Smart Tasks handle the things you need to get done every day. Use Smart Tasks like a personal assistant to put activities on your calendar and send emails for you so your customers get the service they expect. Amp up the emails you send by using professionally designed emarketing templates that complement your Smart Tasks.

Get started today with one of many sample Smart Task templates. Apply Smart Tasks as-is, make changes to fit your specific needs, or create your own.

About Swiftpage

Swiftpage is committed to empowering individuals, small business and mobile sales teams to better manage their business interactions, more intelligently engage their customers, and convert more interactions into transactions. The company's growing network of partners, customers, end-users and employees collectively represent the Swiftpage Nation, united across the globe as one team, on one journey. Learn more at www.swiftpage.com and join the conversation at social.swiftpage.com.