



Service-IT_EN

User Manual

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Service-IT_EN

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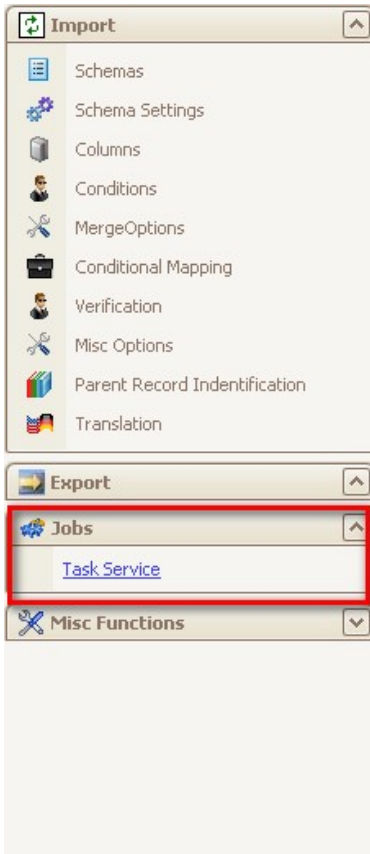
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Home > Service IT tasks

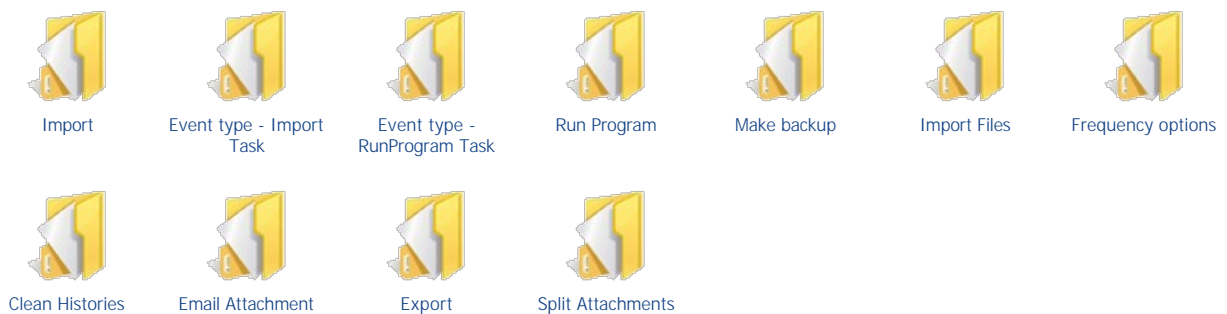
Service IT Options

Task Service is an integrated into Import IT tool. It makes Import IT more convenient in usage and saves your time for running tasks manually. With Task Service you can perform your imports automatically in particular time of day, week or month.

Task Service is an addon that allows making Imports, back ups, importing files and starting other programs automatically. It can be opened from "Jobs" menu:



With Service IT addon you can set to start programs, make back ups, import documents or run imports automatically. The time can be specified once, on daily, weekly and monthly basis.



See also

- [Reporting options](#)

Home > Service IT tasks > Import

Import

Please follow Task Service Wizard steps to set your Import task properly:

ServiceWizard

Task options

Select event type

Task name: Contact

Event type: Time

Task type: Import

Show advanced options

Run as specific user

User name: username

User password: password

Next > Cancel

With the next step you can set the [task frequency](#) : once, daily, weekly or monthly.

ServiceWizard

Task options

Schedule options

Frequency: Once

Once

Date: 12/18/2010

Time: 12:00:00 AM

Execute if missed

Next > Cancel

Specify here your Import task options. You can select a schema for import, set a number of records and make a backup if necessary. It is also possible to use different source files for import, no matter which file was specified in your Import schema. This feature is very useful if you make automated imports of exported files that are saved to a particular folder. In this case you can set to import all *.CSV files of this folder. The command will have the following look: C:\Import*.csv. This feature is supported only for files in Excel and CSV formats at present. Service program will save all file names that were imported in order not to import them anew. It is also possible to move file to another folder after import. This setting can be configured on the Misc Options tab of Import IT tool.

If you wish to import some particular files that begin with a word "import" for example, you can set this in the command and it will have the following look: C:\Import*.csv.

ServiceWizard

Task options

Import task options

Schema name: Contacts_update

Use different source file

Import: All records

Start: 0 End: 1844...

Make a backup

When: Before import

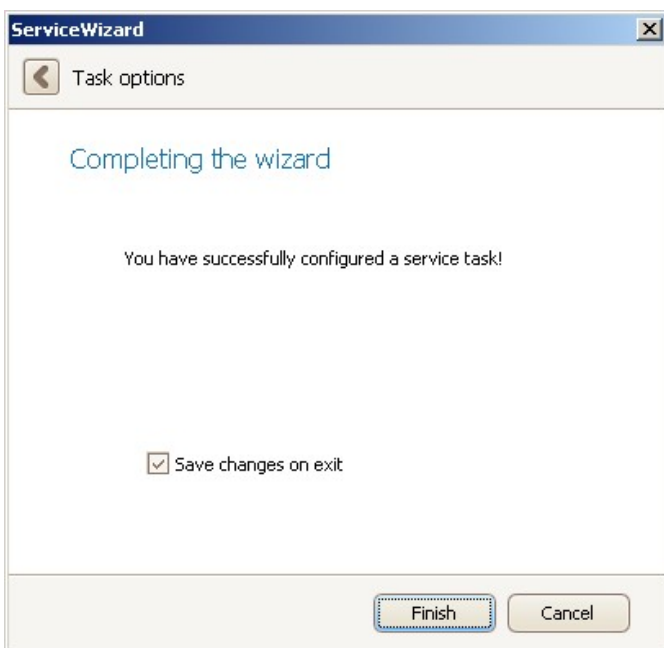
Backup Path: C:\Documents and Settings\All User



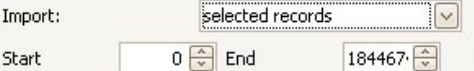
With attachments

Next > Cancel

Once you finish specifying all settings, click 'Next' to proceed and then 'Finish' on the

'Completing the Wizard' window:



Function	Description
Task name	Specify here the name for your task
Schema name	Select the schema you would like to set the import task for. If you do not have any schemas, you will need to create them.
Event type: 	' Time ' is for settings the task execution for particular time of the day, week or month. ' Task ' is for setting a sequence of task executions, i.e. running one task after another. When selecting 'Task' you can also set a delay which this task will be executed after.
Frequency	Set here how often you would like to execute the task: once, daily, weekly or monthly.
Task type	Specify here if you would like to run import or any other program
 	Here you can specify the number of records you would like to import: all records or a range of records
Execute if missed	Check this box if you would like to execute this task on computer start if it was not executed in time. E.g. you computer was off and the task was not executed. The Schema will be imported once after you power on the computer if ' Execute if missed '

<input checked="" type="checkbox"/> Show advanced options <input checked="" type="checkbox"/> Run as specific user User name: <input type="text" value="username"/> User password: <input type="text" value="password"/>	option is enabled Check ' Show advanced options ' box if you would like to run this task under particular act user. Specify there your username and password
<input checked="" type="checkbox"/> Make a backup When: <input type="text" value="Before import"/> <input type="button" value="v"/> Backup path: <input type="text" value="C:\Documents and Settings\..."/> <input type="button" value="..."/> <input type="checkbox"/> With attachments	<input type="text" value="BeforeImport"/> <input type="button" value="v"/> BeforeImport AfterImport WithoutImport If you would like to make a backup of your ACT! database before, after the task or without the Import, please check ' Make a backup ' box and select the path where the backup file should be stored. If you would like to backup attachments, check ' With attachments ' box.
<input checked="" type="checkbox"/> Save changes on exit	You can save your configuration settings by checking ' Save changes on exit ' box.

See also

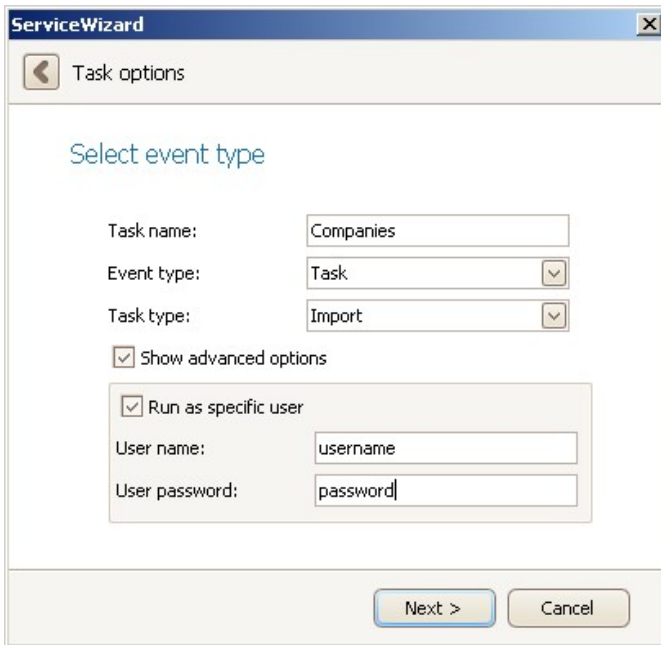
- [Event type - Import Task](#)
- [Event type - RunProgram Task](#)
- [Run Program](#)
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- [Split Attachments](#)

Add Comment

[Home](#) > [Service IT tasks](#) > [Event type - Import Task](#)

Event type - Task

Selecting '**Task**' as event type means settings a sequence of task executions. This command allows setting a new task execution after a particular task already set in Service IT.

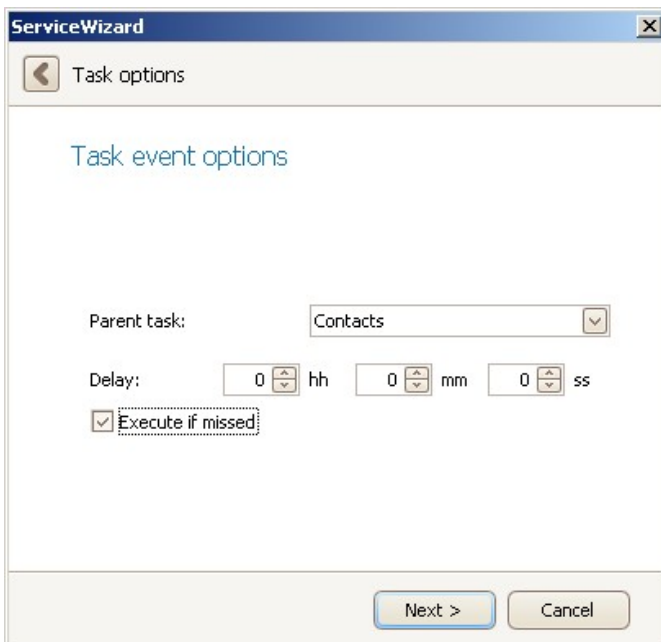


The screenshot shows the 'ServiceWizard' window with the 'Task options' tab selected. The window title is 'ServiceWizard'. Below the title bar, there is a back arrow icon and the text 'Task options'. The main content area is titled 'Select event type'. It contains the following fields and controls:

- 'Task name:' text box containing 'Companies'
- 'Event type:' dropdown menu set to 'Task'
- 'Task type:' dropdown menu set to 'Import'
- A checked checkbox labeled 'Show advanced options'
- A sub-section containing a checked checkbox labeled 'Run as specific user', followed by 'User name:' text box containing 'username' and 'User password:' text box containing 'password'

At the bottom of the dialog, there are two buttons: 'Next >' and 'Cancel'.

On the following tab you can specify the parent task and task delay. Parent Task is the task which the current task will be executed after. Delay is optional, but if you would like to delay task execution for some time you can specify this here.



The screenshot shows the 'ServiceWizard' window with the 'Task event options' tab selected. The window title is 'ServiceWizard'. Below the title bar, there is a back arrow icon and the text 'Task options'. The main content area is titled 'Task event options'. It contains the following fields and controls:

- 'Parent task:' dropdown menu set to 'Contacts'
- 'Delay:' section with three spinners: '0' for hours (hh), '0' for minutes (mm), and '0' for seconds (ss)
- A checked checkbox labeled 'Execute if missed'

At the bottom of the dialog, there are two buttons: 'Next >' and 'Cancel'.

Specify here how many records you would like to import and make a backup if necessary.

ServiceWizard

Task options

Import task options

Schema name: Companies

Import: all records

Start: 0 End: 1844...

Make a backup

When: BeforeImport

Backup path: C:\Documents and Settings\...

With attachments

Next > Cancel

□

Finish the task configuration by clicking '**Finish**' button.

ServiceWizard

Task options

Completing the wizard

You have successfully configured a service task!

Save changes on exit

Finish Cancel

Function	Description
Task Name	Specify here the name for your task
Schema name	Specify here the name of the Schema you would like to import
Event Type	'Task' is for executing one task after another. When selecting 'Task' you will also need to set a delay which this task will be executed after.

Parent task: <input type="text" value="Contacts"/>	Select here the Task which your new Task should be executed after
Task type	Import - for importing Schemas set in Import IT
Delay: <input type="text" value="0"/> hh <input type="text" value="0"/> mm <input type="text" value="0"/> ss	A delay for executing the task can be set here. E.g. you would like to execute the task in five minutes after another task
Import: <input type="text" value="all records"/> Start <input type="text" value="0"/> End <input type="text" value="1844..."/> Import: <input type="text" value="selected records"/> Start <input type="text" value="0"/> End <input type="text" value="184467"/>	Here you can specify the number of records you would like to import: all records or a range of records
<input checked="" type="checkbox"/> Make a backup When: <input type="text" value="Before import"/> Backup path: <input type="text" value="C:\Documents and Settings\..."/> <input type="checkbox"/> With attachments	<div style="border: 1px solid black; padding: 2px;"> BeforeImport BeforeImport AfterImport WithoutImport </div> If you would like to make a backup of your ACT! database before, after the task or without the Import, please check ' Make a backup ' box and select the path where the backup file should be stored. If you would like to backup attachments, check ' With attachments ' box.
<input checked="" type="checkbox"/> Show advanced options <input checked="" type="checkbox"/> Run as specific user User name: <input type="text" value="username"/> User password: <input type="text" value="password"/>	Check ' Show advanced options ' box if you would like to run this task under particular act user. Specify there your username and password
<input checked="" type="checkbox"/> Save changes on exit	You can save your configuration settings by checking ' Save changes on exit ' box.
Execute if missed	Check this box if you would like to execute this task on computer start if it was not executed in time. E.g. you computer was off and the task was not executed. The Schema will be imported once after you power on the computer if ' Execute if missed ' option is enabled

See also

- [Import](#)
- [Event type - RunProgram Task](#)
- [Run Program](#)
- [Make backup](#)
- [Import Files](#)
- [Frequency options](#)
- [Clean Histories](#)
- [Email Attachment](#)
- [Export](#)
- [Split Attachments](#)

Home > Service IT tasks > Event type - RunProgram Task

RunProgram Task

If you select **'RunProgram'** as a **Task type**, then the following windows will appear:

ServiceWizard

Task options

Select event type

Task name: Program

Event type: Task

Task type: RunProgram

Show advanced options

Run as specific user

User name: username

User password: password

Next > Cancel

On the following tab you can specify the parent task and task delay. Parent Task is the task which the current task will be executed after. Delay is optional, but if you would like to delay task execution for some time you can specify this here.

ServiceWizard

Task options

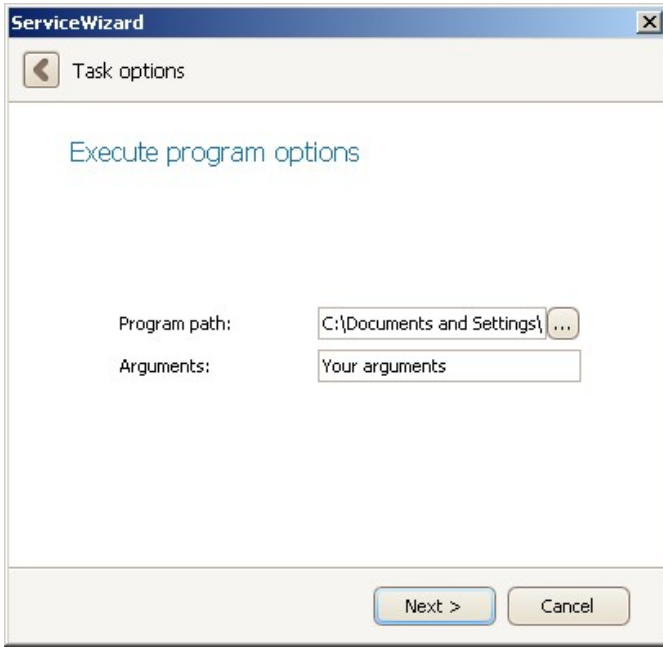
Task event options

Parent task: Contacts

Delay: 0 hh 0 mm 0 ss

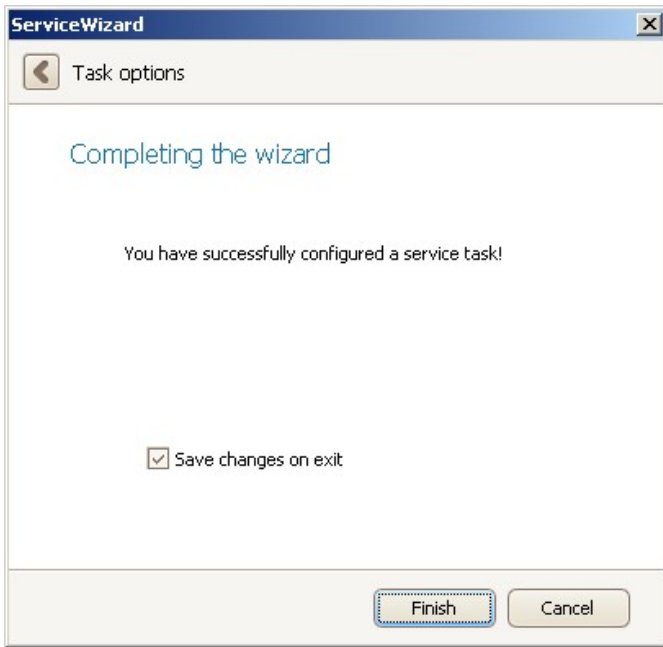
Execute if missed

Next > Cancel



□

Finish the task configuration by clicking '**Finish**' button.



Function	Description
Task Name	Specify here the name for your task
Program path	Specify here the path to the program that should be started
	Select here the type for your event: 'Time' is for settings the task execution for particular time of the day, week or month.

Event Type	'Task' is for setting a sequence of task executions, i.e. running one task after another. When selecting 'Task' you will also need to set a delay which this task will be executed after.
Parent Task	Select here the name of the Task which the current task should be executed after
Task type	RunProgram task type allows starting any program automatically using Task Service tool
Arguments	An argument can be added as a description to each run program task
Delay: <input type="text" value="0"/> hh <input type="text" value="0"/> mm <input type="text" value="0"/> ss	Set here how long the program should wait before current task execution.
Execute if missed	Check this box if you would like to execute this task on computer start if it was not executed in time. E.g. you computer was off and the task was not executed. The Schema will be imported once after you power on the computer if ' Execute if missed ' option is enabled
<input checked="" type="checkbox"/> Show advanced options <input checked="" type="checkbox"/> Run as specific user User name: <input type="text" value="username"/> User password: <input type="text" value="password"/>	Check ' Show advanced options ' box if you would like to run this task under particular act user. Specify there your username and password
<input checked="" type="checkbox"/> Save changes on exit	You can save your configuration settings by checking ' Save changes on exit ' box.

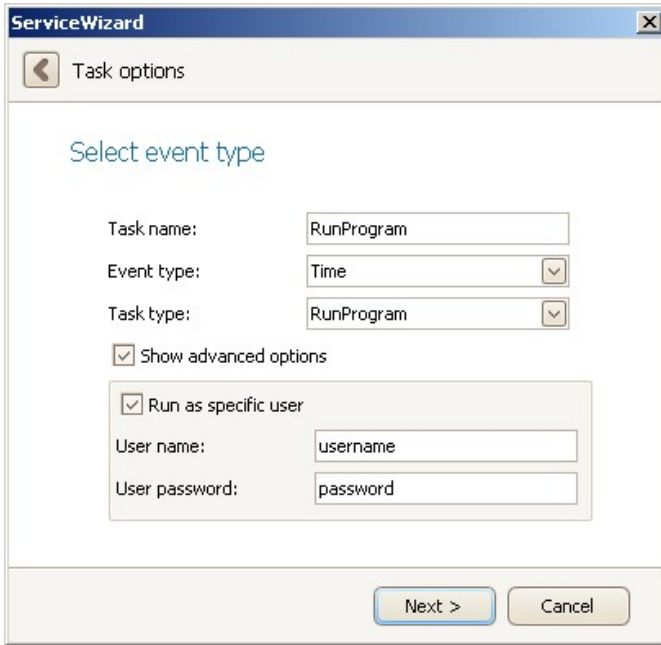
See also

[Import](#)
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Home > Service IT tasks > Run Program

Run Program

Please follow Task Service Wizard steps to set your RunProgram task properly:

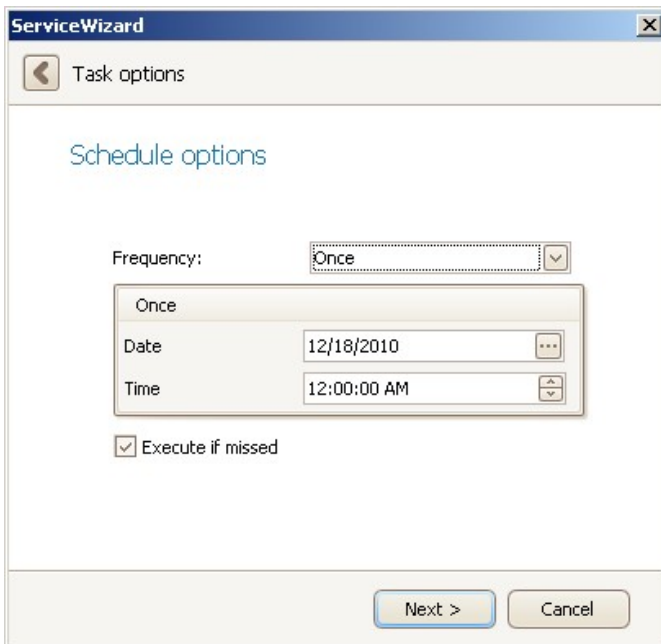


The screenshot shows the 'ServiceWizard' window with the 'Task options' tab selected. The main heading is 'Select event type'. The form contains the following fields and options:

- Task name: RunProgram
- Event type: Time (dropdown menu)
- Task type: RunProgram (dropdown menu)
- Show advanced options
- Run as specific user
- User name: username
- User password: password

At the bottom, there are 'Next >' and 'Cancel' buttons.

On the next step you can set the [task frequency](#) : once, daily, weekly or monthly.

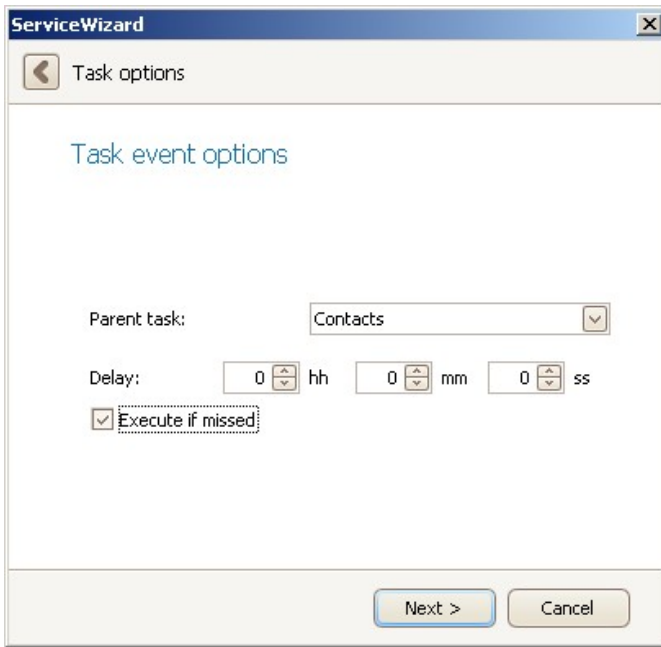


The screenshot shows the 'ServiceWizard' window with the 'Task options' tab selected. The main heading is 'Schedule options'. The form contains the following fields and options:

- Frequency: Once (dropdown menu)
- Once (expanded dropdown menu):
 - Date: 12/18/2010 (calendar icon)
 - Time: 12:00:00 AM (time picker)
- Execute if missed

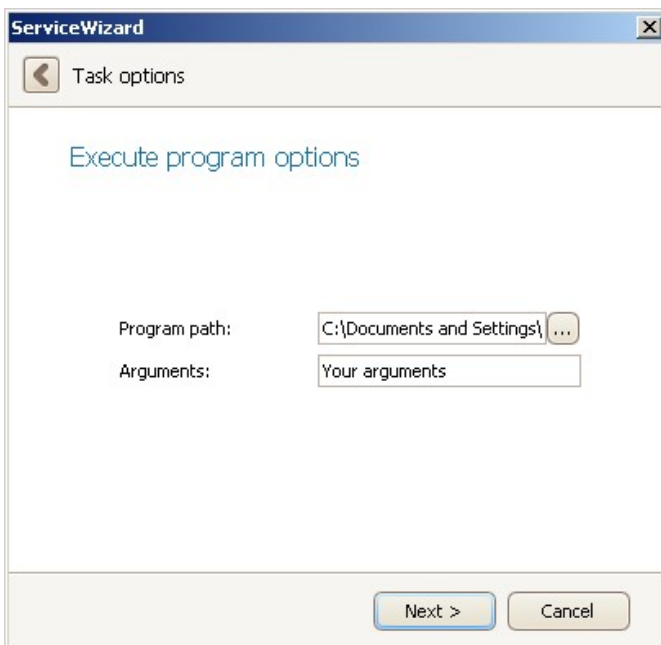
At the bottom, there are 'Next >' and 'Cancel' buttons.

Specify here your RunProgram execute task options: parent task and task delay. Parent Task is the task which the current task will be executed after. Delay is optional, but if you would like to delay task execution for some time you can define this here.



The screenshot shows the 'ServiceWizard' window with the 'Task options' tab selected. The main heading is 'Task event options'. Below this, there is a 'Parent task:' label followed by a dropdown menu containing the text 'Contacts'. Underneath, there is a 'Delay:' label followed by three spinners for 'hh', 'mm', and 'ss', each with the number '0' displayed. Below the spinners is a checked checkbox labeled 'Execute if missed'. At the bottom of the dialog, there are two buttons: 'Next >' and 'Cancel'.

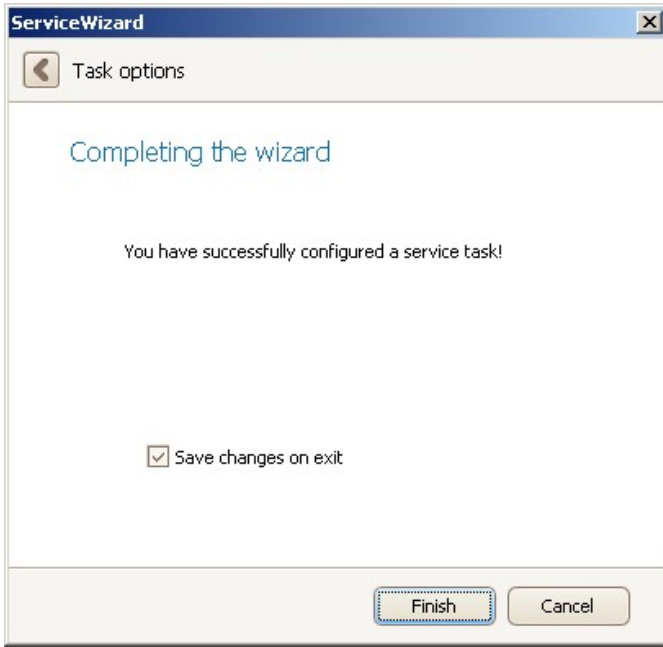
□



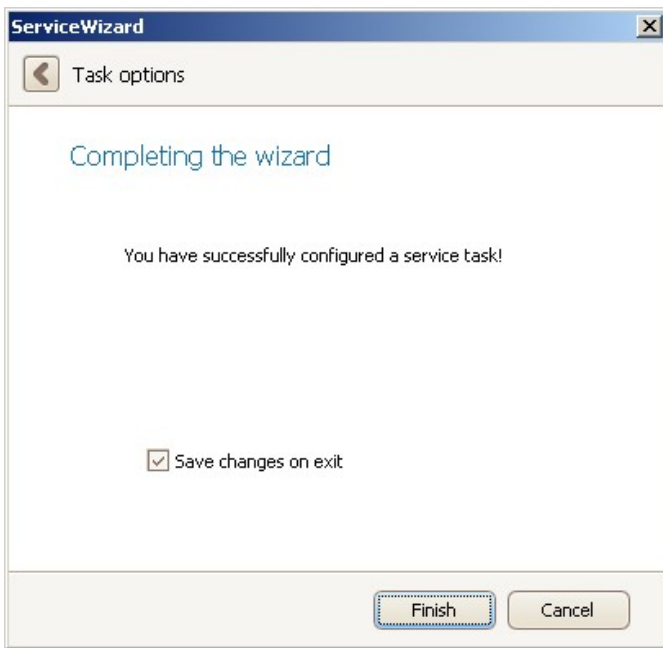
The screenshot shows the 'ServiceWizard' window with the 'Task options' tab selected. The main heading is 'Execute program options'. Below this, there is a 'Program path:' label followed by a text box containing 'C:\Documents and Settings\...' and a browse button (...). Underneath, there is an 'Arguments:' label followed by a text box containing 'Your arguments'. At the bottom of the dialog, there are two buttons: 'Next >' and 'Cancel'.

□


Finish the task configuration by clicking '**Finish**' button.



Once you finish specifying all settings, click 'Next' to proceed and then 'Finish' on the 'Completing the Wizard' window:



Function	Description
Task name	Specify here the name for your task
Schema name	Select the schema you would like to set the import task for. If you do not have any schemas, you will need to create them.
	'Time' is for settings the task execution for

Event type: 	particular time of the day, week or month. 'Task' is for setting a sequence of task executions, i.e. running one task after another. When selecting 'Task' you can also set a delay which this task will be executed after.
Frequency	Set here how often you would like to execute the task: once, daily, weekly or monthly.
Task type	Specify here if you would like to run import or any other program
Program path	Specify here the path to the program that should be started
Execute if missed	Check this box if you would like to execute this task on computer start if it was not executed in time. E.g. you computer was off and the task was not executed. The Schema will be imported once after you power on the computer if 'Execute if missed' option is enabled
<input checked="" type="checkbox"/> Show advanced options <input checked="" type="checkbox"/> Run as specific user User name: <input type="text" value="username"/> User password: <input type="text" value="password"/>	Check 'Show advanced options' box if you would like to run this task under particular act user. Specify there your username and password
Arguments	An argument can be added as a description to each run program task
<input checked="" type="checkbox"/> Save changes on exit	You can save your configuration settings by checking 'Save changes on exit' box.
Parent Task	Select here the name of the Task which the current task should be executed after
Delay: <input type="text" value="0"/> hh <input type="text" value="0"/> mm <input type="text" value="0"/> ss	Set here how long the program should wait before current task execution.

See also

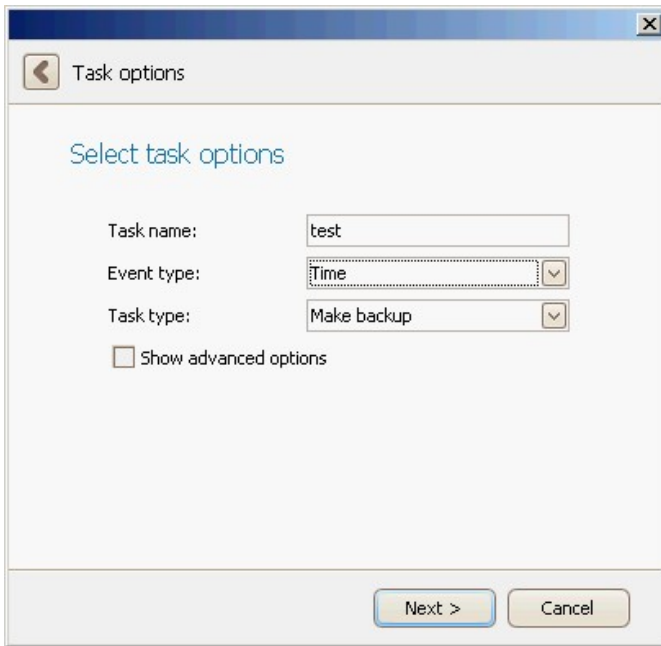
- [Import](#)
- [Event type - Import Task](#)
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[Home](#) > [Service IT tasks](#) > [Make backup](#)

Make backup

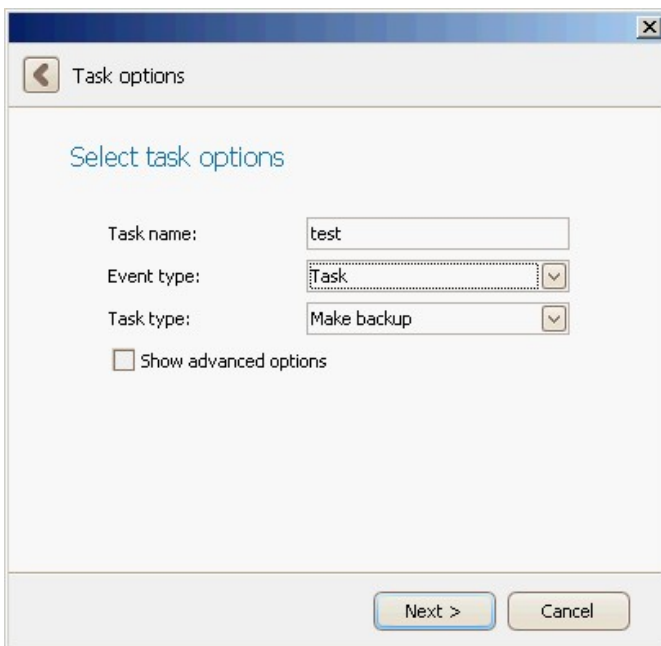
Task service can be set to make automated backups in particular time or after particular

task. In case you would like to set the time for your database backups you need to select "Time" option for your task:



The screenshot shows a dialog box titled "Task options" with a back arrow icon on the left and a close button (X) on the right. The main heading is "Select task options". Below this, there are three fields: "Task name:" with a text input containing "test"; "Event type:" with a dropdown menu showing "Time"; and "Task type:" with a dropdown menu showing "Make backup". There is also a checkbox labeled "Show advanced options" which is currently unchecked. At the bottom of the dialog, there are two buttons: "Next >" and "Cancel".

In case you would like the backup to be performed after some particular task you will need to create backup with option "Task":



The screenshot shows a dialog box titled "Task options" with a back arrow icon on the left and a close button (X) on the right. The main heading is "Select task options". Below this, there are three fields: "Task name:" with a text input containing "test"; "Event type:" with a dropdown menu showing "Task"; and "Task type:" with a dropdown menu showing "Make backup". There is also a checkbox labeled "Show advanced options" which is currently unchecked. At the bottom of the dialog, there are two buttons: "Next >" and "Cancel".

Creating backups feature makes Task Service more reliable since it allows saving database before and after each task so that you could restore your database in case something runs improperly.

The Task Service allows saving backups [to file](#) or [to FTP](#) .

See also

[Import](#)
[Event type - Import Task](#)
[Event type - RunProgram Task](#)
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[Import Files](#)
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[Export](#)
[Split Attachments](#)

Home > Service IT tasks > Make backup > Backup to file

Backup to file

In case you would like to store your data locally, you need to select an option "Backup to file":

The screenshot shows a 'Task options' dialog box with a 'Backup options' section. The fields are as follows:

- ACT! Database: C:\Documents and Settings\ ...
- User: chris huffman
- Password: (empty)
- Backup attachments
- Backup to: File (dropdown menu)
- Backup path: (empty) ...
- Max backups: 10 (spin box)

At the bottom of the dialog are 'Next >' and 'Cancel' buttons.

On the above form you need to specify login details for your ACT! database, put checkmark to the box if you would like to backup with attachments, specify backup path - a zip file which the backup will be made to and write a number of maximum backups.

A number of maximum backups means how many backup files will be stored locally on your machine. I.e. if you select '5' for maximum number of backups the system will store first latest 5 backup files. Then when the sixth backup is being created the very first backup file is removed the rest are renamed and a new backup file is added.

See also


[Backup to FTP](#)

Home > Service IT tasks > Make backup > Backup to FTP

Backup to FTP

In case you would like to store backups on your FTP server you need to select 'Backup to FTP server' option:

ACT! Database:	C:\Documents and Settings\ ...
User:	chris huffman
Password:	
<input checked="" type="checkbox"/> Backup attachments	
Backup to	FTP server
FTP account	ftpserver
Remote path	backupfolder
Max backups	10

In order to specify settings for your FTP account you need to click  button and specify FTP connection settings:

Backup options	
ACT! Database:	C:\Documents and Settings\ ...
User:	chris huffman
Password:	
<input checked="" type="checkbox"/> Backup attachments	
Backup to	FTP server
FTP account	
Remote path	
Max backups	1

Connection name:	ftpserver
Host:	hpst
Port:	21
<input type="checkbox"/> Passive mode	
Login:	login
Password:	*****
<input type="checkbox"/> Use SSL	Auto

FTP settings form

This way you can create several accounts in case you would like to store data on different FTP servers. Later you will be able to select needed account from the drop down list.

In the '**Remote path**' field you need to write folder name where the backup file will be store. Please note, this should be the name of real folder, this option does not allow browsing FTP server for folders or creating new folders.

A number of **maximum backups** means how many backup files will be stored on your FTP server. I.e. if you select '5' for maximum number of backups the system will store first latest 5 backup files. Then when the sixth backup is being created the very first backup file is removed the rest are renamed and a new backup file is added.

See also

[Backup to file](#)

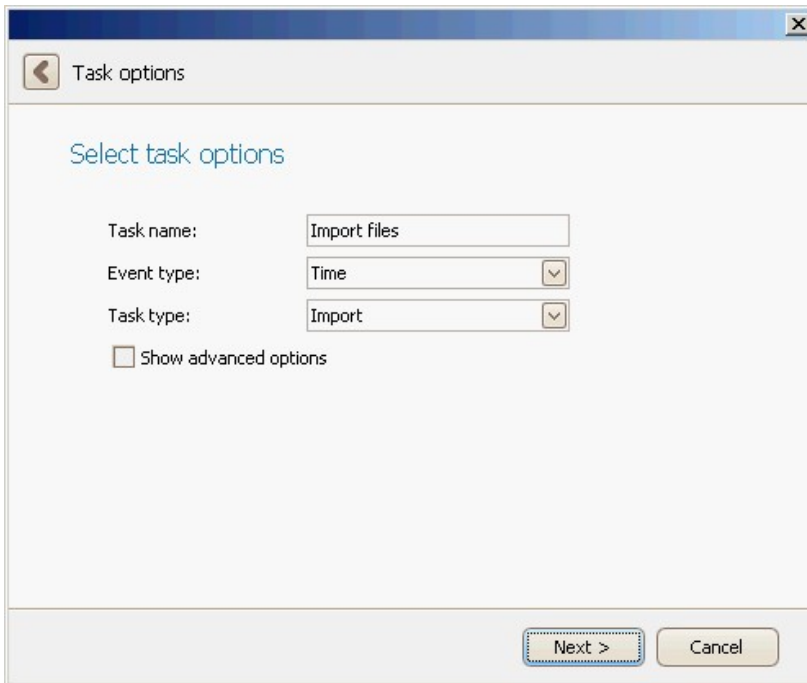
Home > Service IT tasks > Import Files

Import Files

You can create a task service schema for importing files to your ACT!. Imported files will appear under "Documents" section in your CRM.

To start configuring your schema for files import you need to follow Service Wizard steps and specify all needed settings.

Schema name can be specified on the following window:



Task options

Select task options

Task name: Import files

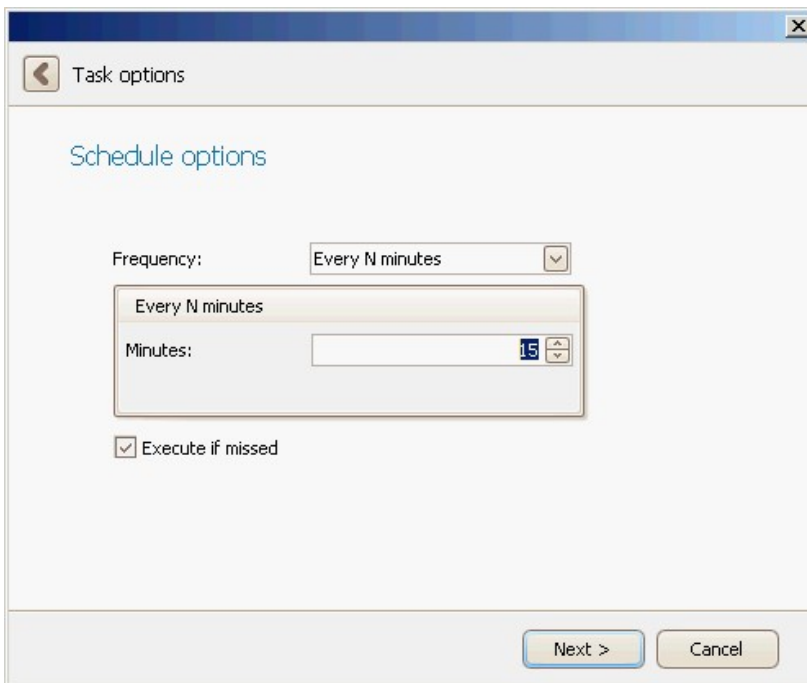
Event type: Time

Task type: Import

Show advanced options

Next > Cancel

Then you will need to select a [frequency option](#) for running your task:



Task options

Schedule options

Frequency: Every N minutes

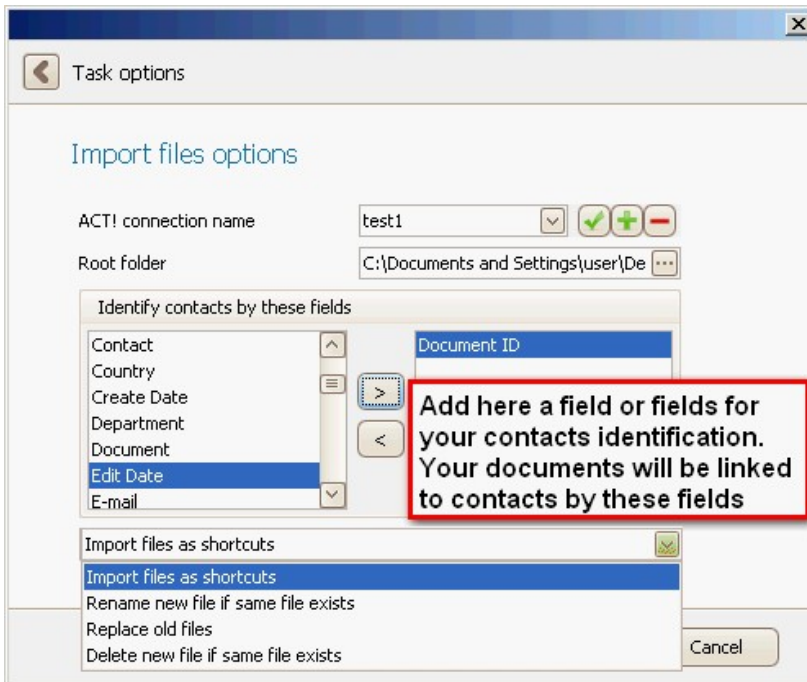
Every N minutes

Minutes: 15

Execute if missed

Next > Cancel

On the following screen documents import options should be configured:



- **ACT! connection name** - select a database where your documents will be imported to. If there is no database connection in the list then you can create a new connection by specifying user name and password for your ACT! database.
- **Root folder** - specify a root folder where your documents folders are stored. **Please note!:** Documents will be imported only from the folders which were found based on contacts identification options, e.g. "Document ID". Subfolders from documents folders will not be imported. E.g. your root folder "Documents" contains folders with Document IDs 01, 02, 03, etc. If these folders contain documents in subfolders those subfolders will not be checked and documents will be ignored.
- **Identify Contacts by these fields** - select a field or fields which will be used to link your documents to contacts

You may also select an option for documents importing to your ACT! database:

- **Import files as shortcuts** - the file will remain in the folder and a link to it will appear in ACT!
- **Rename file if same file exists** - If the file with the same name already exists a new file will be renamed and imported. E.g. your database already contains a file "order.xls". If the file with the same name is being imported it will be renamed to "order1.xls". After import all files will be removed from the root folder.
- **Replace old files** - If your database contains a file with the same name as the one being imported, it will be replaced with a new file. After import all files will be removed from the root folder.
- **Delete new file if same file exists** - if a file with the same name already exists it will not be imported, just removed from the root folder. If there is no file with the same name then it will be imported and then removed from the root folder.

See also

[Import](#)
[Event type - Import Task](#)
[Event type - RunProgram Task](#)
[Run Program](#)
[Make backup](#)
[Frequency options](#)
[Clean Histories](#)

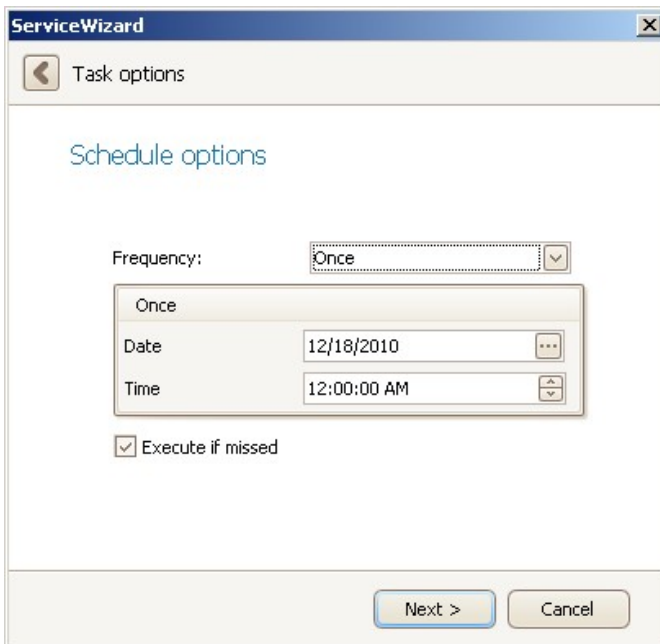
[Email Attachment](#)
[Export](#)
[Split Attachments](#)

[Home](#) > [Service IT tasks](#) > [Frequency options](#)

Frequency Options

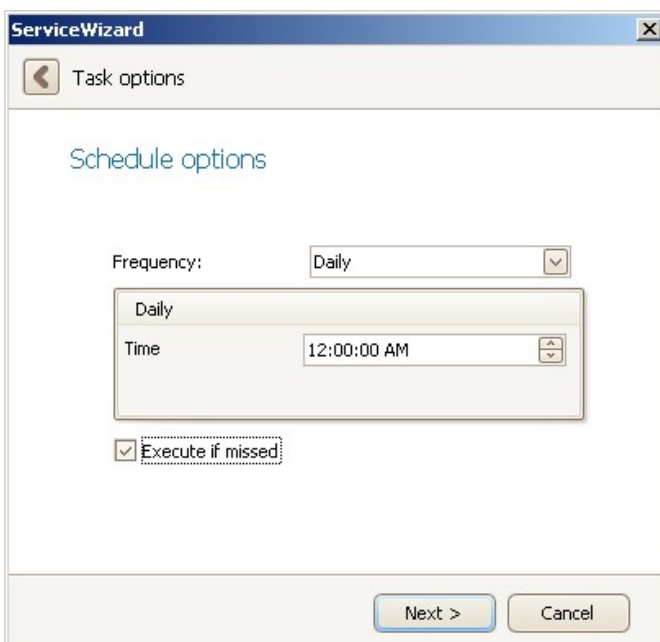
You can set your task to run once, on daily, weekly or monthly basis. This setting can be set on the second step of the Task Service Wizard:

In case you would like to run your task **once**, you need to specify date and time:



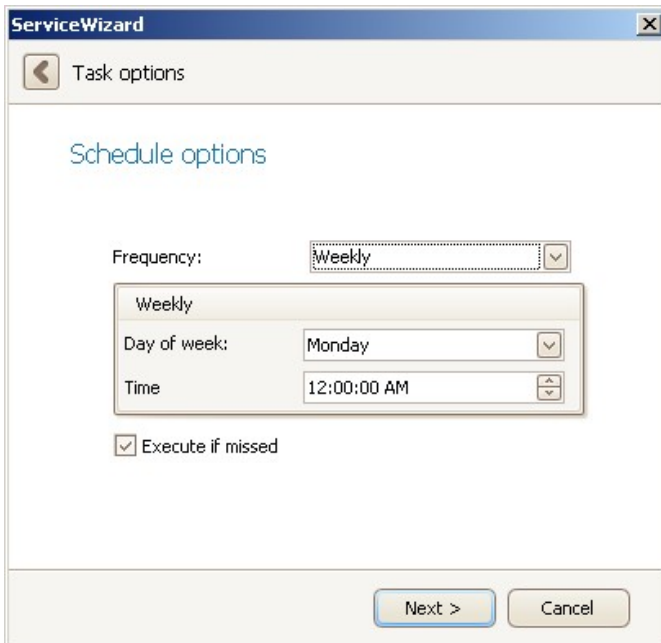
The screenshot shows the 'ServiceWizard' dialog box with the 'Task options' tab selected. Under 'Schedule options', the 'Frequency' dropdown is set to 'Once'. A sub-dialog box for 'Once' is open, showing 'Date' as '12/18/2010' and 'Time' as '12:00:00 AM'. The 'Execute if missed' checkbox is checked. 'Next >' and 'Cancel' buttons are at the bottom.

In case the task should be performed **daily**, you will need to specify only time:



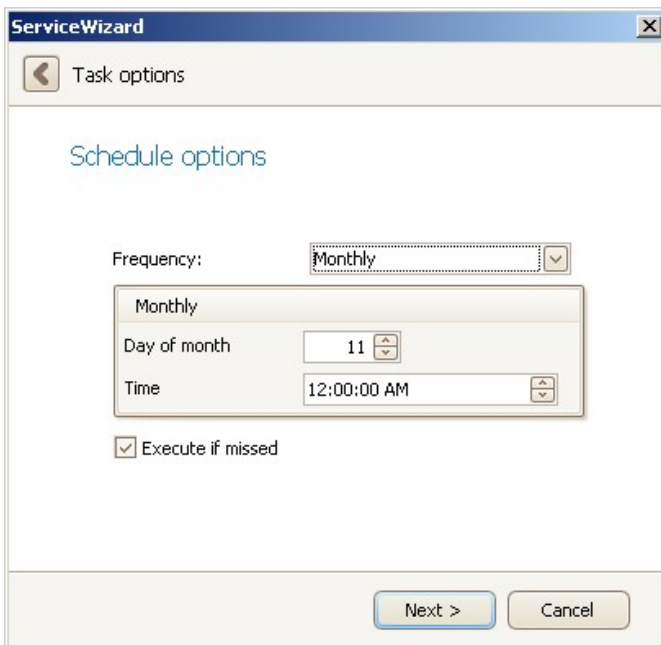
The screenshot shows the 'ServiceWizard' dialog box with the 'Task options' tab selected. Under 'Schedule options', the 'Frequency' dropdown is set to 'Daily'. A sub-dialog box for 'Daily' is open, showing 'Time' as '12:00:00 AM'. The 'Execute if missed' checkbox is checked. 'Next >' and 'Cancel' buttons are at the bottom.

For **weekly task running** a day of week and time should be specified:



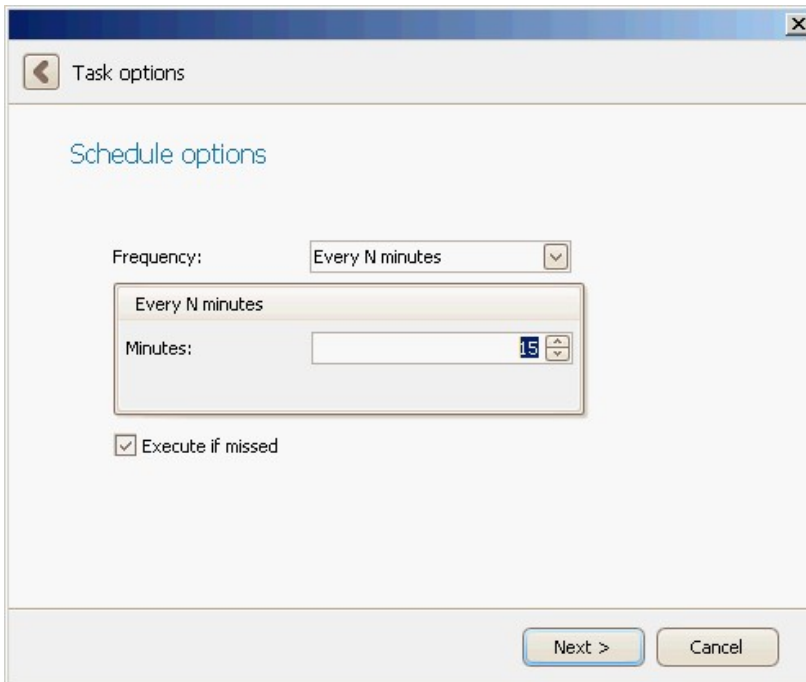
The screenshot shows the 'ServiceWizard' dialog box with the 'Task options' tab selected. Under the 'Schedule options' section, the 'Frequency' is set to 'Weekly'. A sub-dialog box for 'Weekly' is open, showing 'Day of week' set to 'Monday' and 'Time' set to '12:00:00 AM'. The 'Execute if missed' checkbox is checked. At the bottom, there are 'Next >' and 'Cancel' buttons.

For **monthly task running** a day of month and time should be specified:



The screenshot shows the 'ServiceWizard' dialog box with the 'Task options' tab selected. Under the 'Schedule options' section, the 'Frequency' is set to 'Monthly'. A sub-dialog box for 'Monthly' is open, showing 'Day of month' set to '11' and 'Time' set to '12:00:00 AM'. The 'Execute if missed' checkbox is checked. At the bottom, there are 'Next >' and 'Cancel' buttons.

It is also possible to run task every n minutes:




See also

[Import](#)
[Event type - Import Task](#)
[Event type - RunProgram Task](#)
[Run Program](#)
[Make backup](#)
[Import Files](#)
[Clean Histories](#)
[Email Attachment](#)
[Export](#)
[Split Attachments](#)

Home > Service IT tasks > Clean Histories

Clean Histories

With **Clean Histories** feature you can analyze and delete Histories from your ACT! database. E.g. you would like to remove all Histories that are older than 1 year. You will be able to run analysis that will group your Histories depending on the day of creation.

You can create Clean Histories schema by clicking  button and selecting "Clean Histories" in your Task Service. You can set this option to run in some specific time, in this case you need to select "Time" as event type for your schema or after some particular task, in this case you need to select "Task" as event type for your schema:

Task options

Select task options

Task name: Clean Histories

Event type: Time

Task type: Clean Histories

Show advanced options

Next > Cancel

On the next step you will need to specify frequency options if you would like to run this task on time basis:

Task options

Schedule options

Frequency: Once

Once

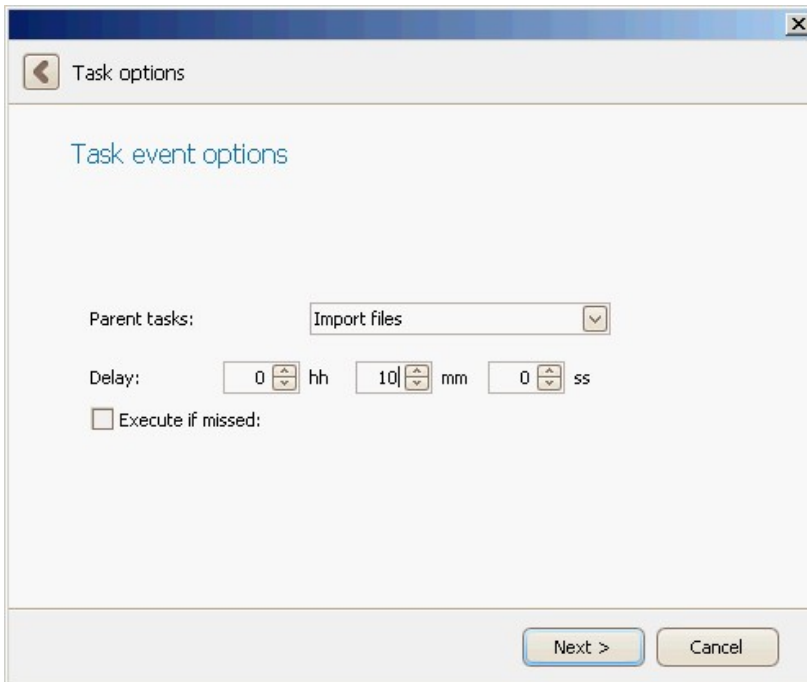
Date: 7/19/2011

Time: 9:12:31 AM

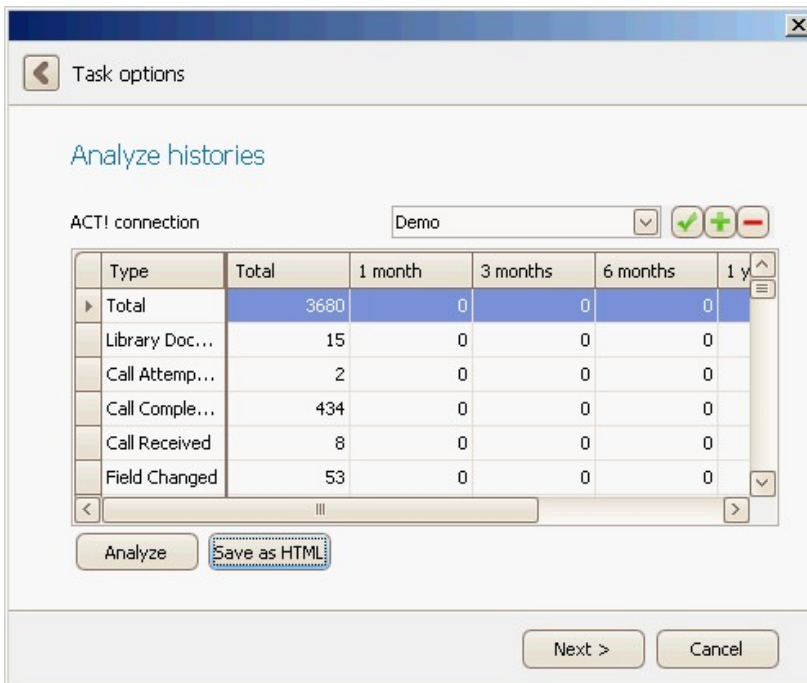
Execute if missed


Next > Cancel

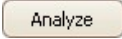
or specify Parent Task and delay time if you would like to run this task after some particular task created in your Service:

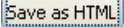


Then you will be able to start analyzing your ACT! Histories:



In ACT! connection, please select from the list a connection to the database you would like to run analysis for. If there is no database connection in the list then you can create a new connection by clicking  button and specifying user name and password for your ACT! database.

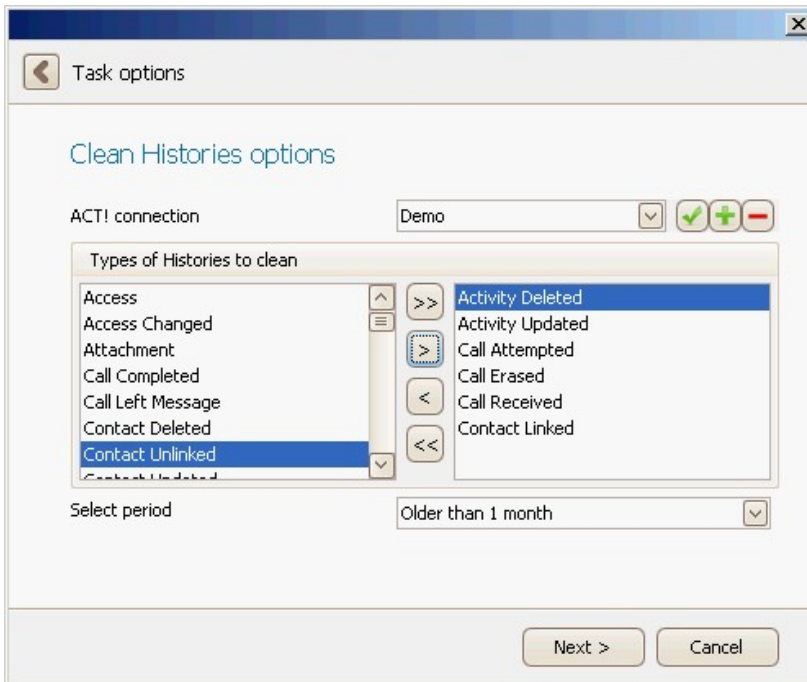
To start analysis, please click  button. The analysis will show the total number of your Histories and will group them by period of creation.

You can save Histories analysis results as an HTML report. To do this, please click  button.

Histories analyses for database DEMO

Type	Total	Last month	1-3 months	3-6 months	6-12 mo
Total	11625	0	0	0	0
Library Document	72	0	0	0	0
Call Attempted	9	0	0	0	0
Call Completed	914	0	0	0	0
Call Received	38	0	0	0	0
Field Changed	201	0	0	0	0
Access	0	0	0	0	0
Letter Sent	35	0	0	0	0
Meeting Held	3948	0	0	0	0
Meeting Not Held	134	0	0	0	0
To-do Done	1285	0	0	0	0
To-do Not Done	9	0	0	0	0
Timer	0	0	0	0	0
Call Erased	0	0	0	0	0
Contact Deleted	98	0	0	0	0
Contact Updated	37	0	0	0	0

To proceed with Histories cleaning, click **"Next"** button:



On the above window you will be able to select Histories types you would like to remove and dates range for them. In the 'Types of Histories to clean' please select needed histories types and using arrows move them to the right column.

You can define needed period in the '**Select period**' drop down list:



or you can also define your custom time range by selecting '**User defined**' option:



Click "**Next**" to finish Service Task configuration.

See also

- [Import](#)
- [Event type - Import Task](#)
- [Event type - RunProgram Task](#)
- [Run Program](#)
- [Make backup](#)
- [Import Files](#)
- [Frequency options](#)
- [Email Attachment](#)
- [Export](#)
- [Split Attachments](#)


Home > Service IT tasks > Email Attachment

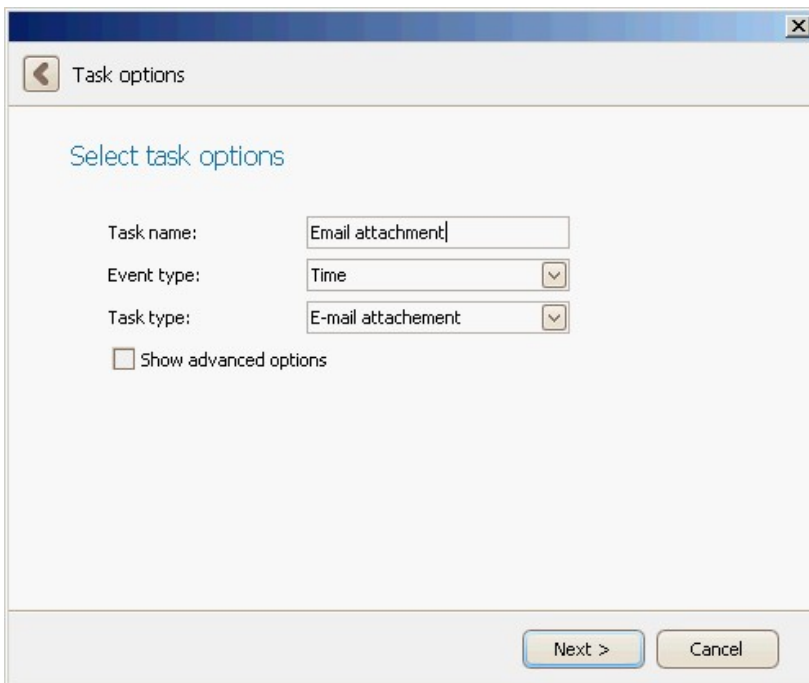
Email Attachment

If fax server in your organization sends all incoming faxes by email you can print them for a proper person automatically using the Task Service. **Email Attachment** option allows assigning such emails to proper Companies or Contacts in your ACT! database and print them for a records manager.

Task Service parses phone numbers in all incoming emails and searches a Contact or a Company by a phone number, then assigns incoming email. If such Contact or Company do not exist then a new record is created.

Please note!: If you would like to use **Email Attachment** feature for emails printing, please install and configure all printers from the list on the "Identify Sales Manager" dialog on the server where Task Service is installed.

You can create Email Attachment schema by clicking  button and selecting "Email Attachment" in your Task Service. You can set this option to run in some specific time, in this case you need to select "Time" as event type for your schema or after some particular task, in this case you need to select "Task" as event type for your schema:



Task options

Select task options

Task name:

Event type:

Task type:

Show advanced options

Next > Cancel

On the next step you will need to specify [frequency options](#) if you would like to run this task on time basis:

Task options

Schedule options

Frequency: Once

Once

Date: 7/19/2011

Time: 9:12:31 AM

Execute if missed

Next > Cancel

Then, please specify Processing Options:

Task options

Processing Options

Mail connection: your connection name

All attachments: All attachments

ACT! connection: test1



Attach files to contacts

Attach files to companies

If file exists then: rename the new file

Next > Cancel

On the above window you will need to:

1. Select mail connection if it is already specified or create a new one by clicking  button and filling all necessary fields for connecting to your mail server.
2. Select if you would like to parse all attachments or only of some specific format, e.g. *.pdf: .pdf
3. Select connection to your ACT! Database. If it is not specified, click  button and

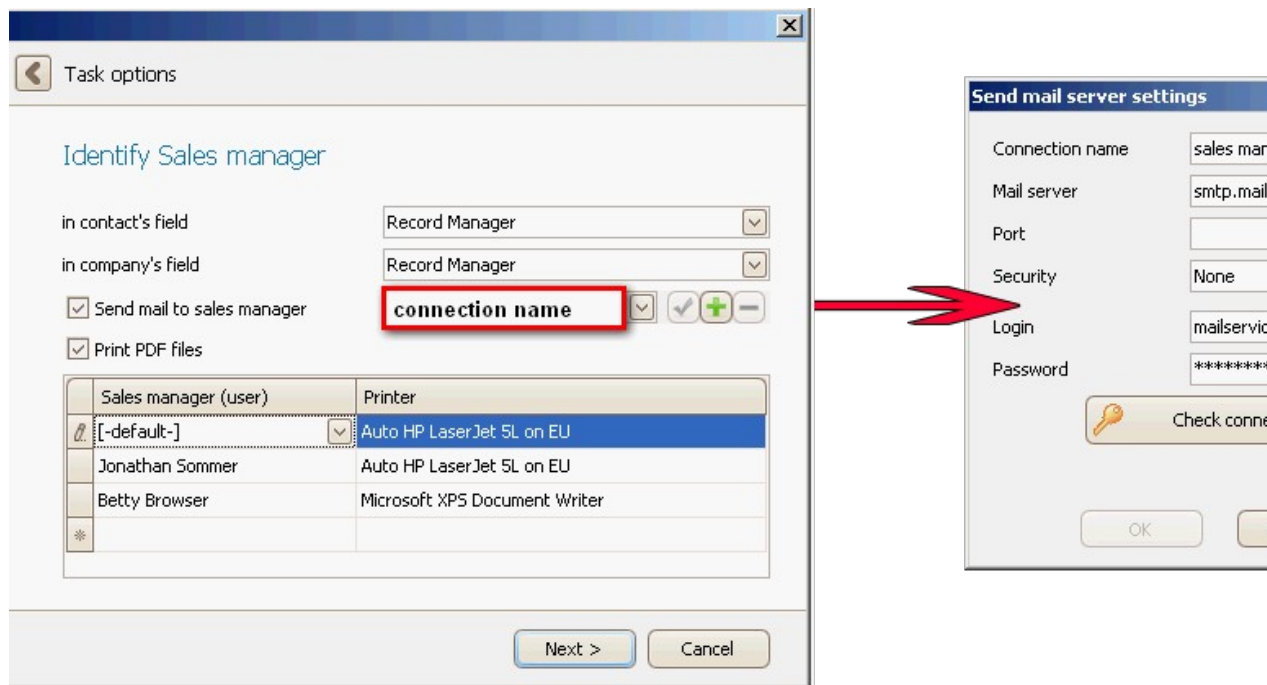
define ACT! Database, user name and password.

4. Select if you would like to attach files to Contacts, to Companies or to both.
5. Specify an action for file handling if it already exists:

If file exists then

rename the new file	▼
rename the new file	
replace it	

Once after you define all settings, please click **"Next"** to proceed:



On this step you will be able to identify Sales Manager and define printer for documents printing:

1. Select the field that corresponds to Sales Manager in your ACT! database
2. Check the option 'Send mail to sales manager' if you would like email to be sent to sales manager
3. If you would like to print PDF files in attachment, check 'Print PDF files' option, otherwise files will not be printed
4. Define printers for your users

See also

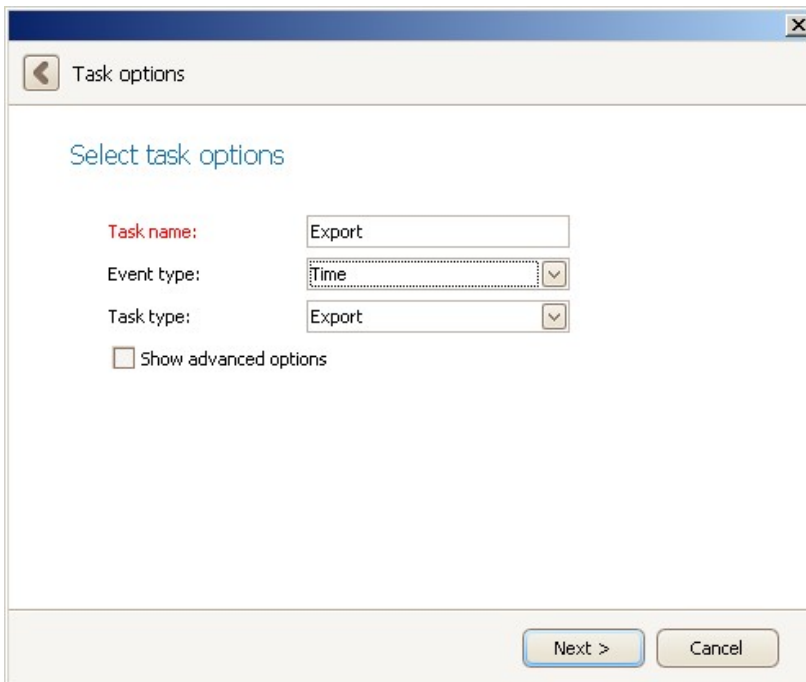
[Import](#)
[Event type - Import Task](#)
[Event type - RunProgram Task](#)
[Run Program](#)
[Make backup](#)
[Import Files](#)
[Frequency options](#)
[Clean Histories](#)
[Export](#)
[Split Attachments](#)

Home > Service IT tasks > Export

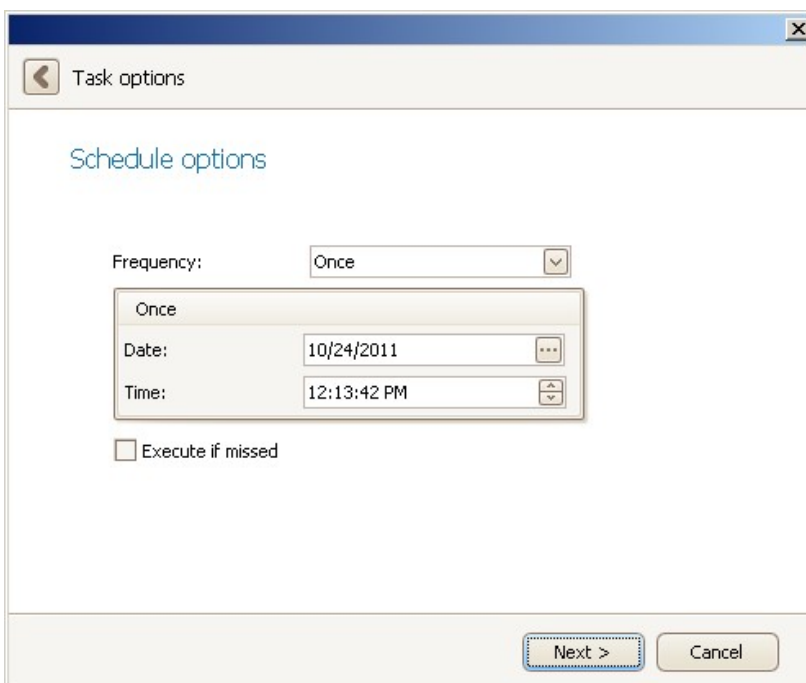
Export

Export task in Service application allows setting automated tasks for Export IT addon. You can run such tasks in a sequence after a particular program or in defined time period. For using this option Export IT addon should be installed on the machine. With Export option you can run exports automatically and then import data to another database.

To create Export schema, please specify schema name, select "Export" type of task in the drop down list and define event type (specific time or sequence of programs execution):

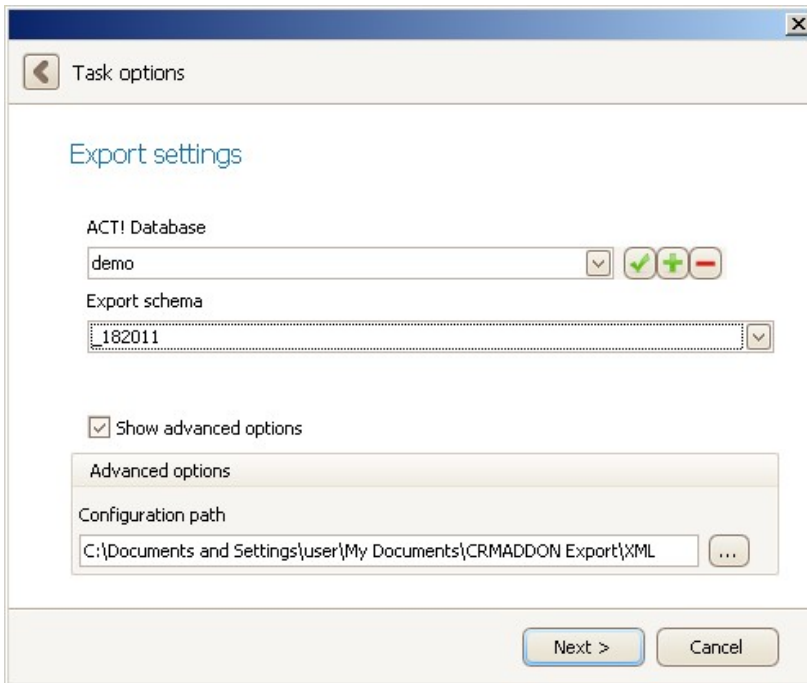


Then define a time option if you decided to run a task in a particular time period:



On the following dialog export settings should be specified. You would need to select ACT!

database connection or create a new one and select export schema created in Export IT addon. Selected schema will be run there automatically. If you have changed the default location of Export IT files you would need to specify the path to export XML files under Advanced Options / Configuration path.



The screenshot shows a dialog box titled "Task options" with a back arrow icon. The "Export settings" section includes:

- ACT! Database:** A dropdown menu showing "demo" with a downward arrow, a green checkmark, a green plus sign, and a red minus sign.
- Export schema:** A dropdown menu showing "182011" with a downward arrow.
- Show advanced options**
- Advanced options:** A sub-section containing:
 - Configuration path:** A text box containing "C:\Documents and Settings\user\My Documents\CRMADDON Export\XML" and a browse button (...).

At the bottom of the dialog are "Next >" and "Cancel" buttons.

See also

- [Import](#)
- [Event type - Import Task](#)
- [Event type - RunProgram Task](#)
- [Run Program](#)
- [Make backup](#)
- [Import Files](#)
- [Frequency options](#)
- [Clean Histories](#)
- [Email Attachment](#)
- [Split Attachments](#)

[Home](#) > [Service IT tasks](#) > [Split Attachments](#)

Split Attachments

Split attachment type of task allows dividing attachment files into separate parts.

To create a new schema for Split Attachment, please specify schema name, select event and task types on the following screen:

Task options

Select task options

Task name: Split Attachments

Event type: Time

Task type: Split Attachments

Show advanced options

Next > Cancel

Then define a time option if you decided to run a task in particular time period:

Task options

Schedule options

Frequency: Daily

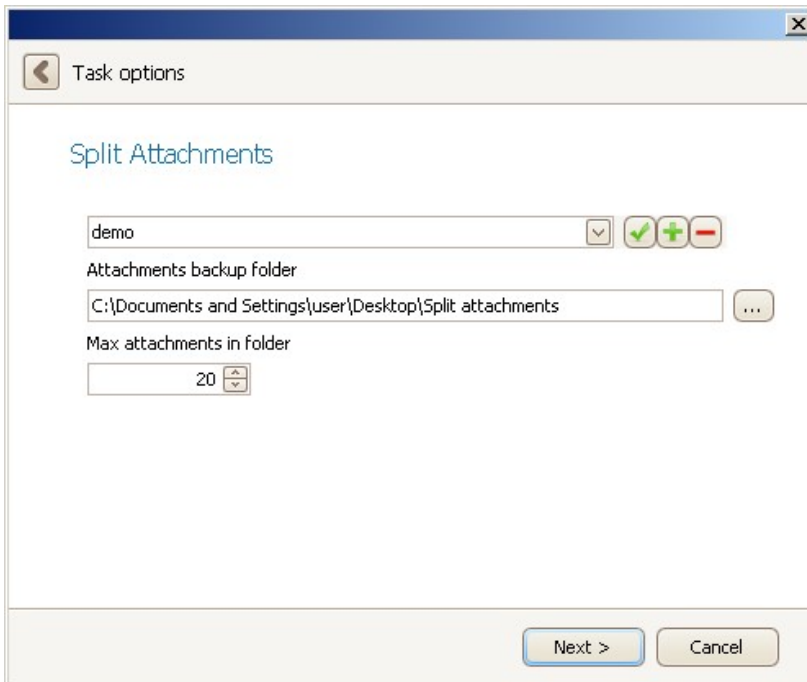
Daily

Time: 12:00:00 PM

Execute if missed

Next > Cancel

On the following dialog, please define split attachment settings: select connection to ACT! database or create a new one, specify a folder for attachments and define a number of attachments in folder:



See also

- [Import](#)
- [Event type - Import Task](#)
- [Event type - RunProgram Task](#)
- [Run Program](#)
- [Make backup](#)
- [Import Files](#)
- [Frequency options](#)
- [Clean Histories](#)
- [Email Attachment](#)
- [Export](#)

Service options

On Service Options tab you can set mail options for notifications sending. Notifications can be sent to the specified email upon executing the task. Service options tab has the following look:

The screenshot shows a web interface with two tabs: 'Tasks' and 'Service options'. The 'Service options' tab is active. Underneath, there is a 'Mail options' section with the following fields and checkboxes:

- From: [Text input field]
- To: [Text input field]
- Server: [Text input field] Login: [Text input field]
- Port: [Text input field with '0' entered] Password: [Text input field]
- Use SSL/TLS
- Send daily status messages

Function	Description
From	Specify here email address where notifications will be sent from
Recipients	Add here an email where notifications should be sent to
Host	Specify here Host name for your email account
Port	Specify here Port for your email account
User name	Specify here the user name of your email account
Password	Specify here the password of your email account
<input type="checkbox"/> Use SSL/TLS	Check this box if you use secure connection to your server
<input type="checkbox"/> Send daily status messages	Check this box in case you would like to receive daily notifications about your service tasks running

At present reporting is sent for three types of events: successful tasks, missed tasks and failed tasks.

To set up your reporting notifications you need to have working Imap/pop account, user name, password and email, the details for which should be added to the **'Mail options'** menu of the service.

See also

[Service IT tasks](#)

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