

Release Notes



Official Release – Version 3.3[a]

One of the original design principles of the ACT Mobile Messenger was to make the process of sending text messages as seamless and automated as possible so that messages can be sent and delivered effortlessly.

This release brings this to the fore with the ‘evolution’ of two key components, Activity and Event Messaging, to a level beyond any CRM messaging capability and certainly beyond any single messaging platform.



1) Activity Messaging

The ability to schedule any type of activity and have a text message confirmations and reminders sent without you having to change your business process or even think about how it’s done. To ‘trust’ that the message will get there, even when the activity is updated/moved in the calendar and be confident that the text message confirmations and reminders will adjust accordingly.



2) Event Messaging

The ability to automatically generate text messages based on;

- a. Activities in your Calendar (Appointments, Calls, Meetings, To-Dos, other)
- b. Any act! Contact Date Field (Birth Date, Create Date, Last Update, etc.)
- c. Any of your Groups or Sub Groups (even Dynamic Groups)

Using any message template incorporating contact and activity fields to any of your databases whether act! is open or closed.

We are very excited about this release and would love to hear how it changes your life. 😊

Included Features

Below is a list of new features included in this release

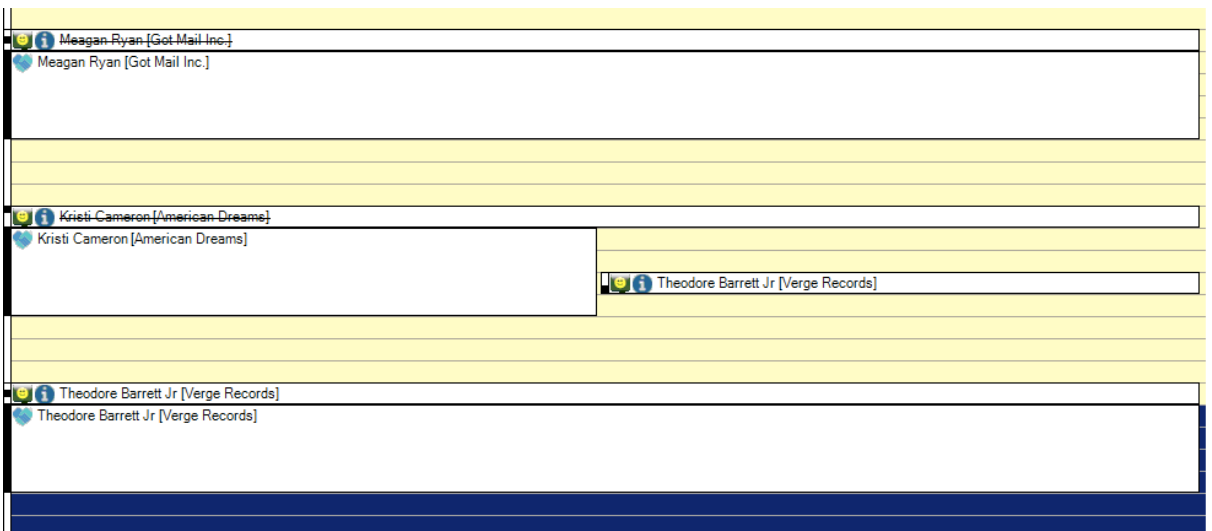
- 1) Activity Messaging Enhancements (Calendar Integration)
 - a. Text Message Confirmations/Reminders added to Calendar (Automatically)
 - b. Move Meetings and move Text Messages too (Drag/Drop)

- 2) Events Messaging Improvements (Complete Automation)
 - a. Send Messages based on Groups (Automatically)
 - b. Send Messages based on Contact Dates (Automatically)
 - c. Send Messages based on Activities in Calendar (Automatically)
 - d. Multiple Database Support (Events work for all your databases)
 - e. SQL Direct Database Access (Events work when act! is closed)

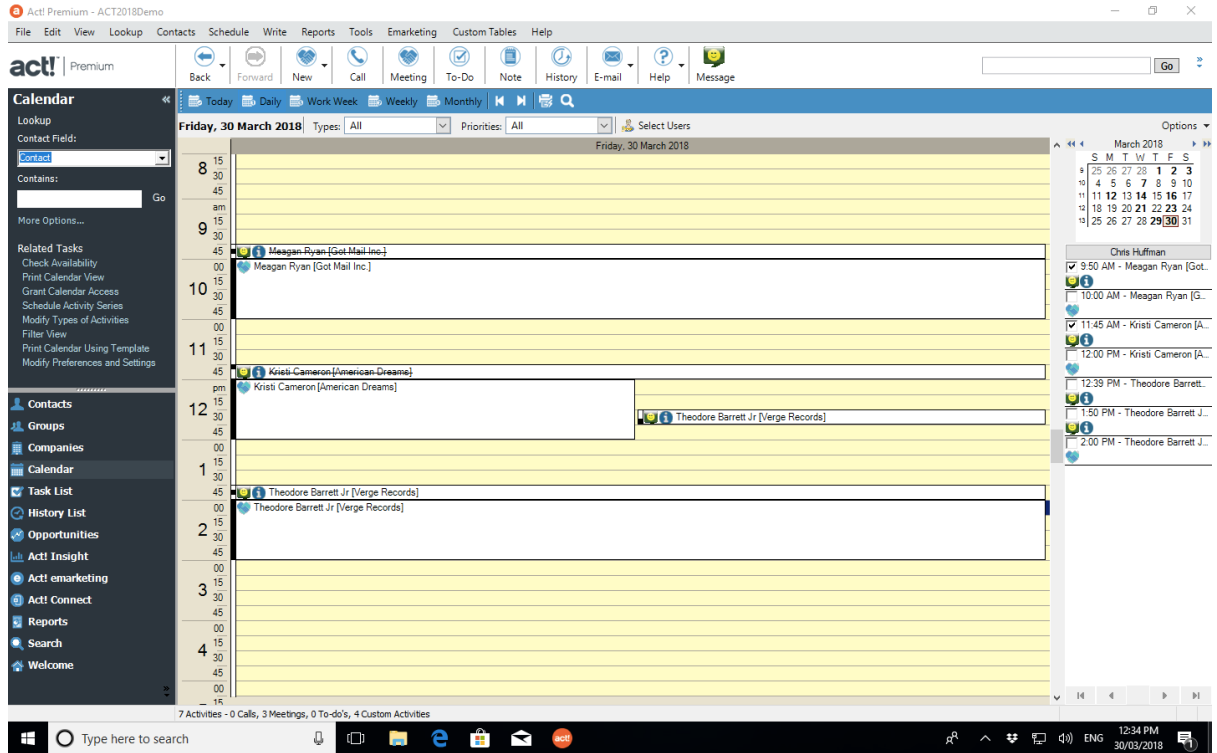
1) Activity Messaging Enhancements (Calendar Integration) [AMMDEV-26]

The past activity messaging feature for sending text message confirmations and reminders relating to activities was based on text messages being placed in a message queue at the time the activity was scheduled. This created a problem in that if the activity was re-scheduled or cancelled (deleted) then the text message would still be in the message queue waiting to send. There was also no visibility of this as there is nothing in the calendar to advise the user that there is a text message still waiting to send even though the activity is no longer in the calendar at the time the message reminder is planned to send.

This new release will automatically add Text Message confirmations and reminders to your Calendar when scheduling meetings, appointments or and other type of activities (even your own custom activity types).

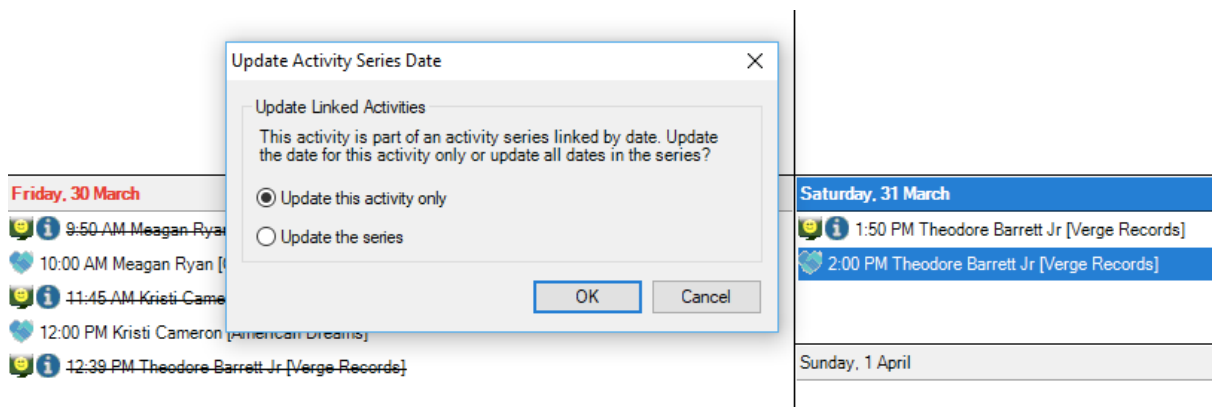


You can also move your activity (drag and drop) and it will move the related text messages activities as well. This is because the primary activity (in this case a Meeting) is bound together with the secondary activities (text messages) via an activity series.

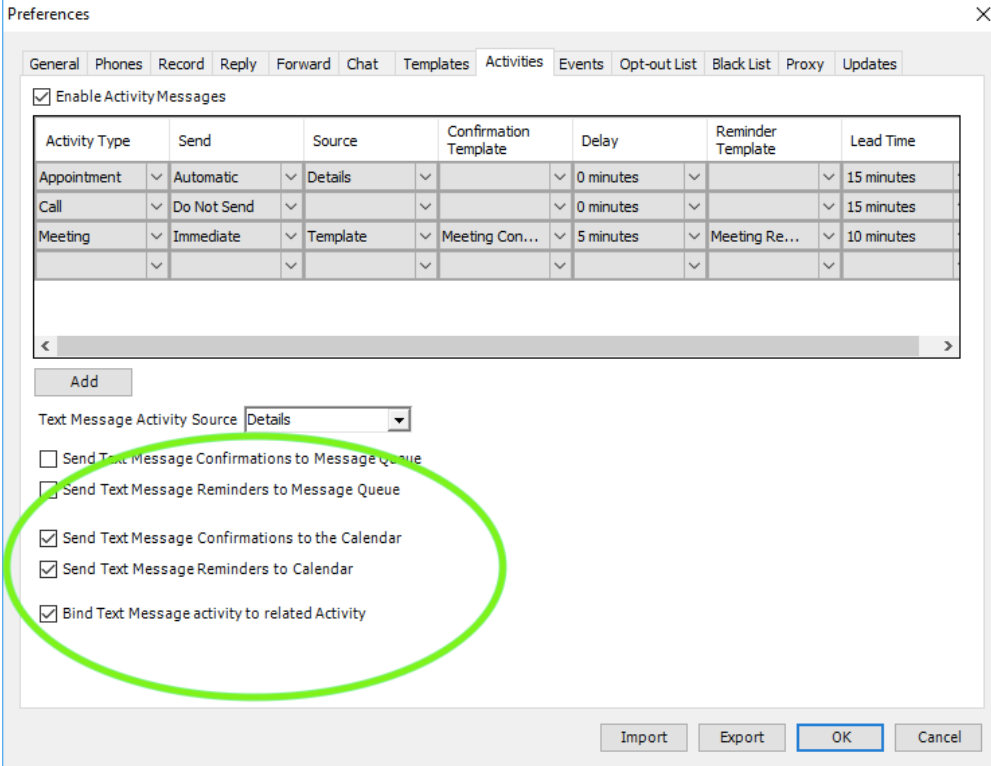


When you move the activity, you will be asked whether you want to move the whole activity series, therefore moving the primary and secondary activities together. Further, you can move the secondary activity without having to move the primary activity, meaning you can move the reminder text message easily.

THIS IS TOTALLY COOL >>>>> AWESOME! 😊



To enable this feature you will need to select the bottom three(3) options relating to sending Text Messages to Calendar rather than the Message Queue.



Preferences

General Phones Record Reply Forward Chat Templates Activities Events Opt-out List Black List Proxy Updates

Enable Activity Messages

Activity Type	Send	Source	Confirmation Template	Delay	Reminder Template	Lead Time
Appointment	Automatic	Details		0 minutes		15 minutes
Call	Do Not Send			0 minutes		15 minutes
Meeting	Immediate	Template	Meeting Con...	5 minutes	Meeting Re...	10 minutes

Add

Text Message Activity Source Details

Send Text Message Confirmations to Message Queue

Send Text Message Reminders to Message Queue

Send Text Message Confirmations to the Calendar

Send Text Message Reminders to the Calendar

Bind Text Message activity to related Activity

Import Export OK Cancel

2) Event Messaging Enhancements (Complete Automation) [AMMDEV-30]

In earlier releases of the ACT Mobile Messenger, the Events tab in the Preferences only included the option of a single Event capability. This new feature offers unlimited events capability with unlimited possibilities.

This feature is a 'SET AND FORGET' messaging capability where the ACT Mobile Messenger takes over the job of generating the messages on your behalf. You simply tell the system how often you want to send the messages and what selection criteria you want to use to select the contacts that receive your messages.

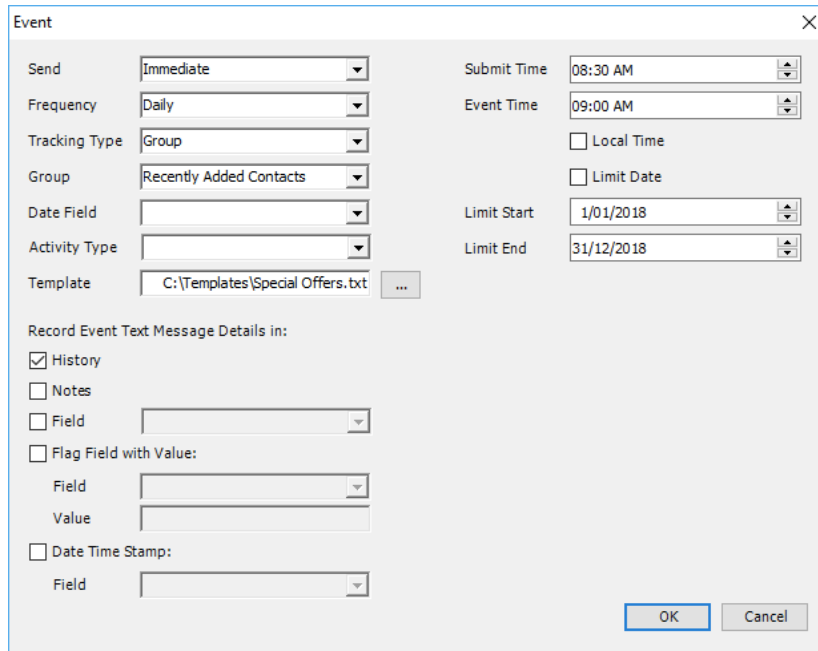
When we say 'how often', this could be hourly, daily, weekly, monthly or yearly.

When we say 'which contacts' this could be Groups, Dates and any Activities.

a) Send Messages based on Groups (Automatically)

The Event Message job below will send text messages immediately (Send Method) every day (Frequency) based on a Group (Tracking Type). The Group is 'Recently Added Contacts', which is a dynamic group that is included with act!. The message template used is 'Special Offers.txt' and the job is submitted every day at 8:30AM (Submit Time) and arrives to the newly added contacts at 9:00AM (Event Time).

Event Message Preference Settings – Group Tracking



The screenshot shows the 'Event' dialog box with the following settings:

- Send: Immediate
- Frequency: Daily
- Tracking Type: Group
- Group: Recently Added Contacts
- Date Field: (empty)
- Activity Type: (empty)
- Template: C:\Templates\Special Offers.txt
- Submit Time: 08:30 AM
- Event Time: 09:00 AM
- Local Time:
- Limit Date:
- Limit Start: 1/01/2018
- Limit End: 31/12/2018

Record Event Text Message Details in:

- History
- Notes
- Field: (empty)
- Flag Field with Value:
 - Field: (empty)
 - Value: (empty)
- Date Time Stamp:
 - Field: (empty)

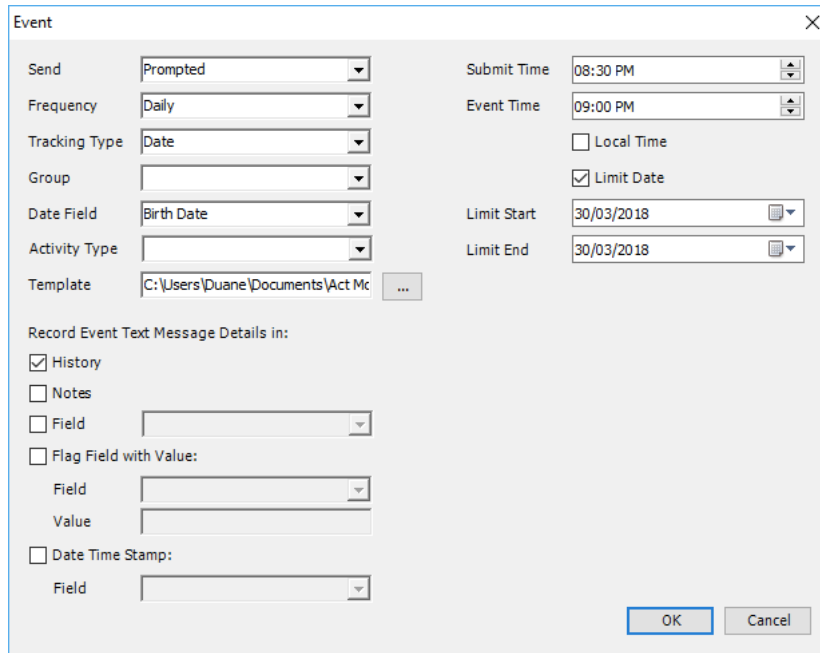
Buttons: OK, Cancel

The messages will also be recorded in act! based on the settings configured. You can even update fields to ensure that contacts are removed from dynamic groups. This means they will only receive the message once since they are no longer part of the group.

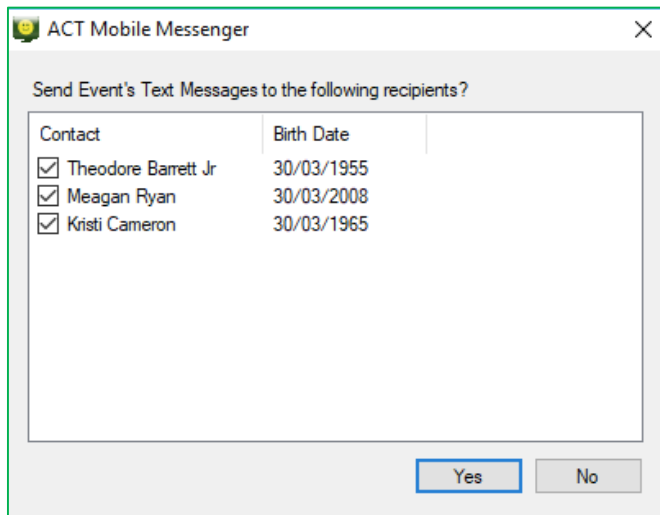
b) Send Messages based on Contact Dates (Automatically)

The Event Message job below will send text messages when prompted (Send Method) every day (Frequency) based on a Date (Tracking Type) field called 'Birth Date'. The message template used is 'Happy Birthday.txt' and the job is submitted every day at 8:30AM (Submit Time) and arrives to the contacts with a birthday at 9:00AM (Event Time).

Event Message Preference Settings – Date Tracking

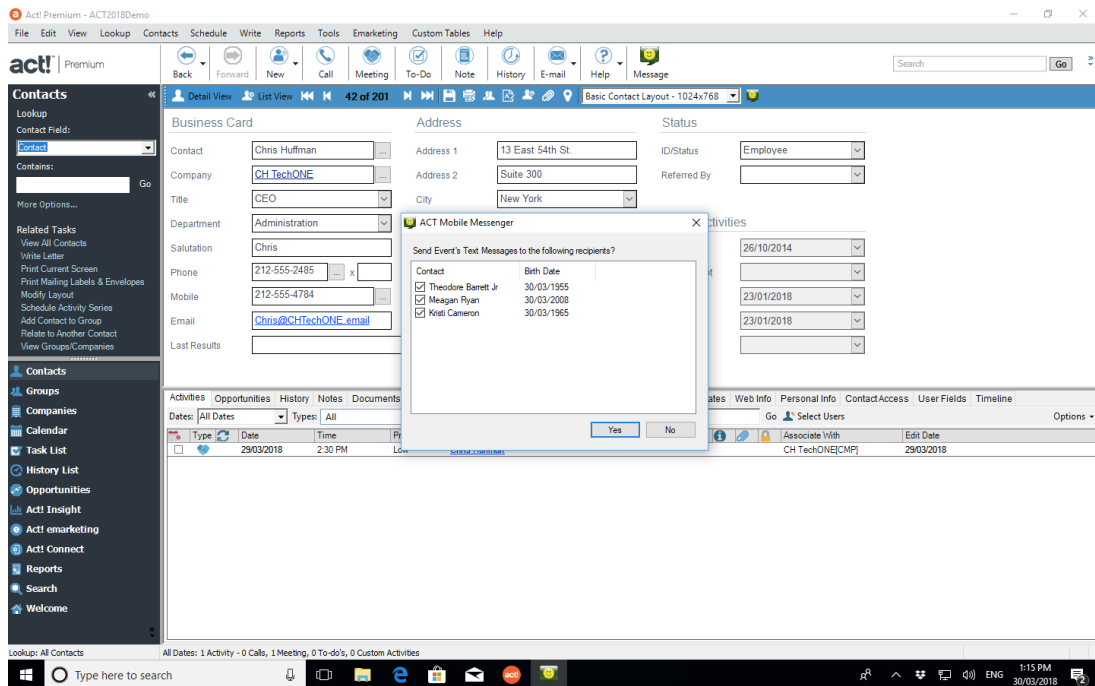


As it is a ‘Prompted’ event message job you will be present with a confirmation box to ensure that these are the contacts you wish to send to and provide the option of removing anyone at the last minute.



Contact	Birth Date
<input checked="" type="checkbox"/> Theodore Barrett Jr	30/03/1955
<input checked="" type="checkbox"/> Meagan Ryan	30/03/2008
<input checked="" type="checkbox"/> Kristi Cameron	30/03/1965

This is how the prompt will appear when you are in act! and it will stay on the screen until you respond ‘Yes’ or ‘No’ to sending the messages. You can remove contacts by un-ticking the check boxes



c) Send Messages based on Activities in Calendar (Automatically)

The ACT Mobile Messenger has always had the option of sending text message confirmations and reminders ... so why all the fuss???? Well the benefit of using Events Messaging to send your Text Message reminders is that it will happen, regardless of whether act! is open or not and will work across multiple databases.

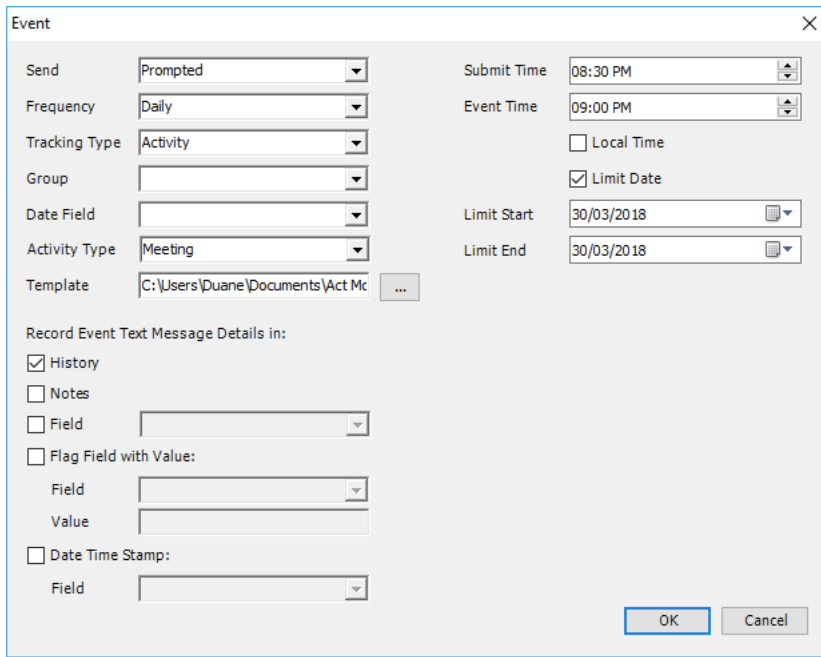
But what if I don't want to send text message reminders to all of my activities? Well that is fine because you can create separate Event Message jobs that are linked to different activity types.

Scenario:

This feature is ideal for anyone who wants to send out daily or weekly reminders of upcoming events on that day or the coming week. All of the messages will be sent at the same time (Event time) and the fact that our message templates can utilize activities from the activity database means that all messages will be personalized to each contact using their own activity details.

Event Message Preference Settings – Activity Tracking

The Event Message job below will send text messages when prompted (Send Method) every day (Frequency) based on Activity (Tracking Type) using the Activity Type of 'Meeting'. The message template used is 'Activity Reminder.txt' and the job is submitted every day at 8:30AM (Submit Time) and arrives to the contacts with a meeting today at 9:00AM (Event Time).



The 'Event' dialog box contains the following settings:

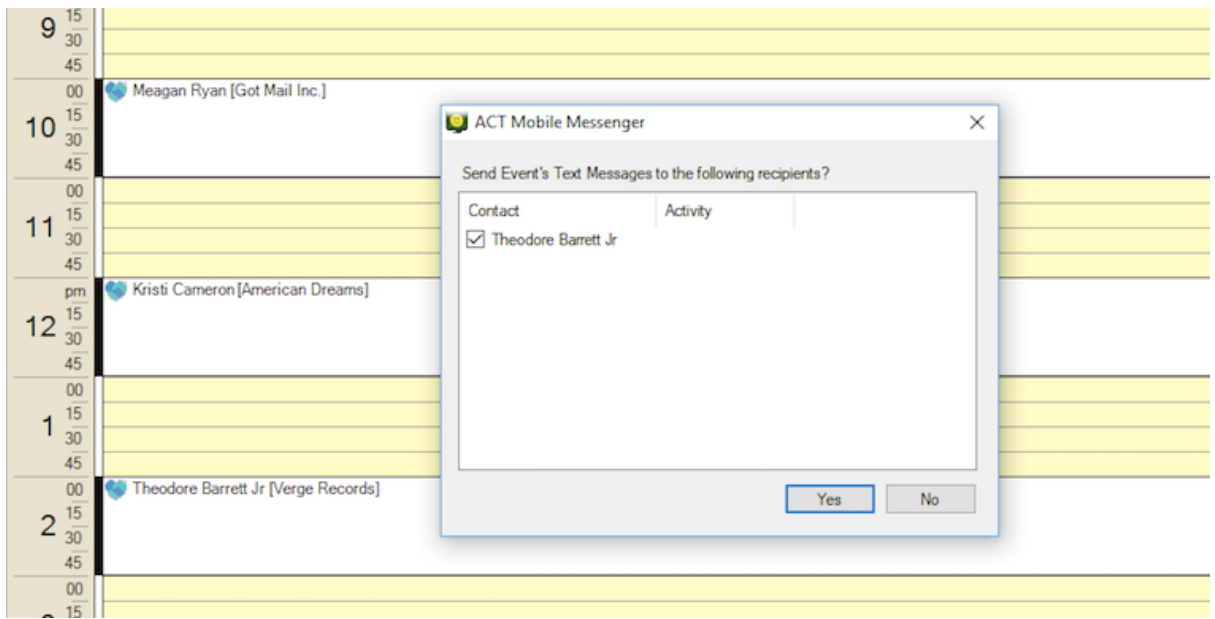
- Send: Prompted
- Frequency: Daily
- Tracking Type: Activity
- Group: (empty)
- Date Field: (empty)
- Activity Type: Meeting
- Template: C:\Users\Duane\Documents\Act Mc ...
- Submit Time: 08:30 PM
- Event Time: 09:00 PM
- Local Time:
- Limit Date:
- Limit Start: 30/03/2018
- Limit End: 30/03/2018

Record Event Text Message Details in:

- History:
- Notes:
- Field: (empty)
- Flag Field with Value:
- Field: (empty)
- Value: (empty)
- Date Time Stamp:
- Field: (empty)

Buttons: OK, Cancel

In the screen below you can see the confirmation box that will appear if you use 'Prompted' send method rather than 'Immediate' or 'Manual'



The screenshot shows a text message inbox with a confirmation dialog box overlaid. The dialog box is titled 'ACT Mobile Messenger' and asks 'Send Event's Text Messages to the following recipients?'. It has two columns: 'Contact' and 'Activity'. Under 'Contact', there is a checked box next to 'Theodore Barrett Jr'. At the bottom of the dialog box are 'Yes' and 'No' buttons.

Latest Release – About Screen



Footnotes:

- i) An updated User Guide including all the latest features will be available soon.