Tasks – Automation Rules

Introduction

Task Automation Rules give you the ability to create rules that will automatically generate tasks when trigger conditions are met. This allows you to create task workflows. Available triggers are outlined below.

Sale Committed
- Inventory Sold
- Misc Sale Line Sold
- Care Plan Sold

Inventory Change
- Inventory Created

Customer Change
- Customer Created

Wish List Change
- Wish List Item Created
- Wish List Item Sold

Repair Job Change
- Repair Created
- Repair Done
- Repair Pick Up

Custom Job Change
- Custom Job Created
- Custom Job Done
- Custom Job Pick Up

Special Order Change
- Special Order Created
- Special Order Ready
- Special Order Pick Up

Appraisal Change
- Appraisal Created
- Appraisal Ready
- Appraisal Pick Up

Many triggers include filters that let you specify additional criteria. For instance, the **Inventory Sold** trigger includes an item filter that allows you to set specific item parameters. See the end of this document for example rules.

> **NOTE:** Task Automation Rules are not compatible with Microsoft Access databases. You must be running a SQL database.

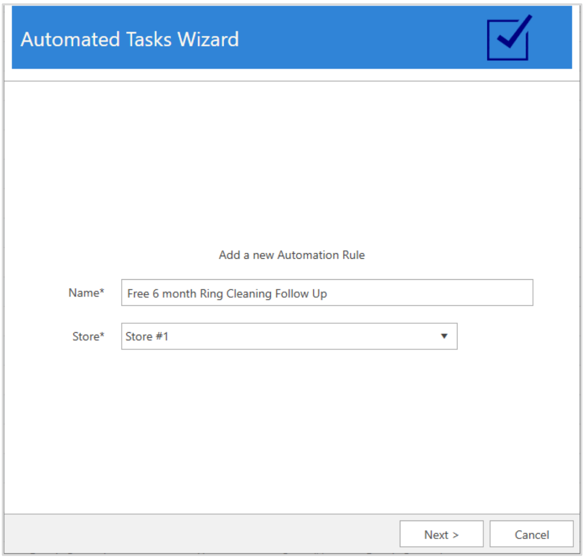
Contents

Working with Rules

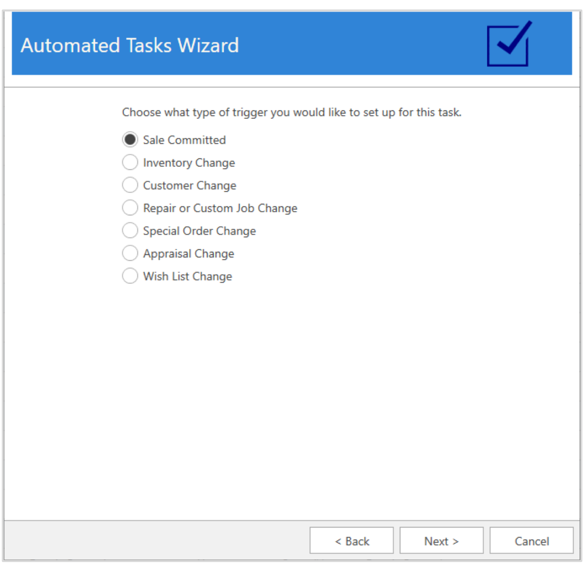
Create

To create a rule:

1. Click **Administrative > Automation Rules > Automation Rules**. The **Automation Task Rules** list will appear.
2. At the bottom, click **Add Rule**. This will open the **Automated Tasks Wizard**.
3. Enter a **Name** for this rule and click **Next**. Note if you are a multi-store user you will also need to choose a **Store**.

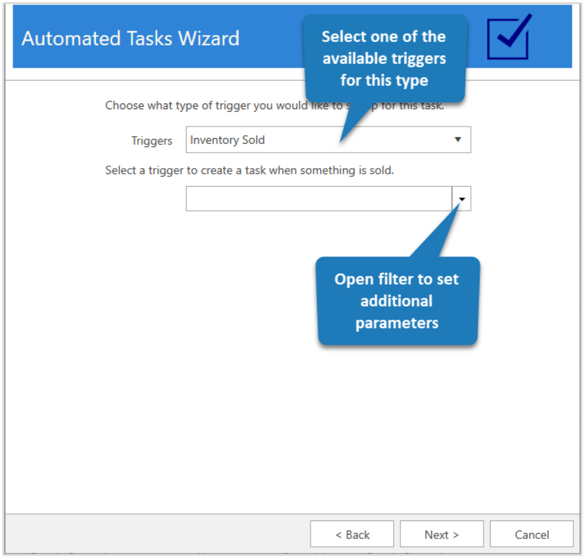


4. Choose the type of trigger and click **Next**.

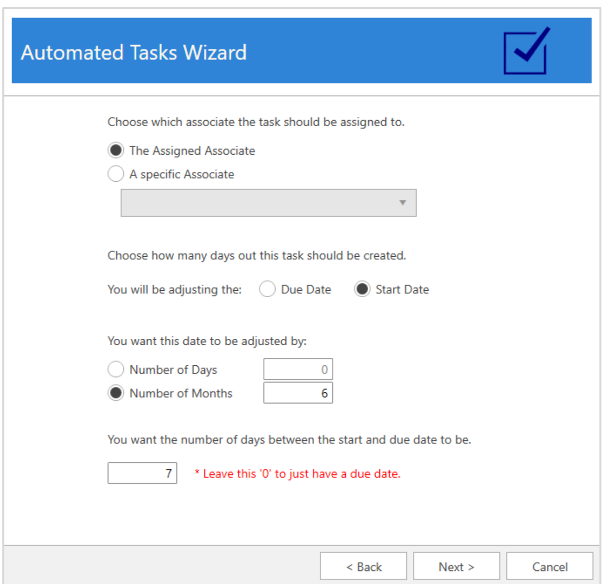


5. Click the **Triggers** drop-down to see available triggers for this type. After selecting a trigger, use the drop-down below it to open the filter. The filter will vary depending on the type of trigger, e.g.

Inventory Sold will include an item filter that lets you specify inventory criteria.



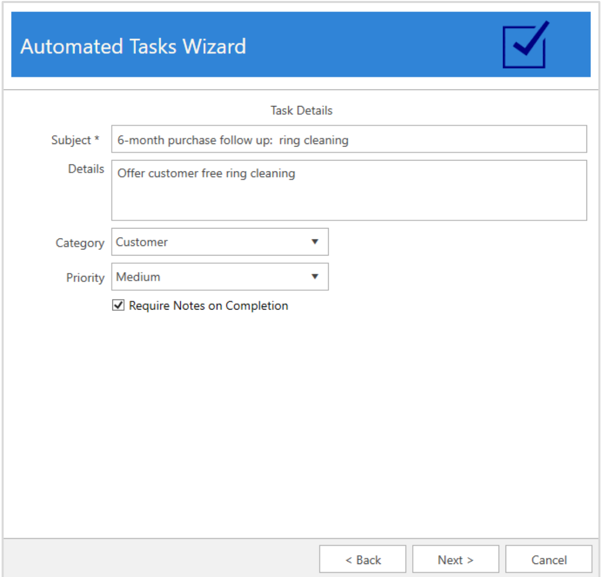
6. After defining criteria, click **OK** to save the filter and then click **Next**.
7. At the top of this window, choose the associate for this task.



Assigned Associate will use the associate that triggered the rule. For example, if this is an **Inventory Sold** rule, **Assigned Associate** would be the person who rang out the transaction. Use **Specific Associate** if you always want to assign the task to the same person

8. Use the bottom half of this window to specify whether you want this task to use a **Due Date** or **Start Date**, then choose how many days or months out you want that date to be. If using a **Start Date**, use the bottom field to specify how many days between **Start** and **Due Date**. Click **Next** when done.

9. Finally, enter the task details and **Finish** adding the rule.



Edit

Existing rules can be edited at any time. Note that this will not update any tasks that were already generated by this rule.

To edit a rule:

1. Click **Administrative > Tasks > Automation Rules**. The **Automation Task Rules** list will appear.
2. Select the rule you want to edit and click **Edit Rule**. Alternatively, you can double click on the rule.
3. Step through the wizard by clicking **Next** and make any desired changes.
4. Complete the wizard by clicking **Finish** at the end.

Delete

Rules are never truly deleted. Instead, they get marked inactive and will not show in your list unless you check **Show Deleted** at the bottom. Note that deleting a rule will not delete any tasks that it already generated.

To delete a rule:

1. Click **Administrative > Tasks > Automation Rules**. The **Automation Task Rules** list will appear.
2. Select the rule you want to delete and click **Delete Rule**.
3. You will see the rule turns red and the **Is Active** column will change to **No**.

Un-Delete

To un-delete a rule:

1. Click **Administrative > Tasks > Automation Rules**. The **Automation Task Rules** list will appear.
2. Check the **Show Deleted** box at the bottom.
3. Double click or edit the rule you wish to make active again.
4. Click **Next** all the way until the wizard completes. Once you click **Finish** the rule will be active again.

Examples

Thank you on new purchases

Rule	New purchase – thank you		
Trigger Type	Sale Committed		
Trigger	Inventory Sold		
Filter	Item Filter	**General tab** Defaults (all blank)	**Type & Status tab** Pricing Methods: Item Pricing Inventory Type: Inventory
Task Associate	The Assigned Associate		
Date Adjustment	7 days		
Task Details	Thank you follow up on new purchase		

Notify customer repair ready

Rule	Repair ready – notify customer		
Trigger Type	Repair or Custom Job Change		
Trigger	Repair Marked Done		
Filter	Job Filter	**General tab** Job Type: Repair	**Status/Dates tab** Defaults (all dates)
Task Associate	The Assigned Associate		
Date Adjustment	0 days		
Task Details	Repair ready – notify customer		

Engagement ring 6 month inspection/cleaning follow up

Rule	Engagement Ring – 6 month inspection/cleaning		
Trigger Type	Sale Committed		
Trigger	Inventory Sold		
Filter	Item Filter	**General tab** Category: 100	**Type & Status tab** Inventory Type: Inventory
Task Associate	The Assigned Associate		
Date Adjustment	6 months		
Task Details	6 month engagement ring follow up – offer inspection/cleaning		

New customer referred, thank referrer

Rule	New customer referral – thank referrer		
Trigger Type	Customer Change		
Trigger	Customer Created		
Filter	Customer Filter	**Rewards/Referral tab** Has Been Referred	**All Other Tabs** Defaults
Task Associate	The Assigned Associate		
Date Adjustment	0 days		
Task Details	New customer referral – thank referrer		

New repair needs to be completed

Rule	New repair needs to be completed		
Trigger Type	Repair or Custom Job Change		
Trigger	Repair Created		
Filter	Job Filter	**General tab** Job Type: Repair	**Status/Dates tab** Defaults (all dates)
Task Associate	Specific associate: your jeweler		
Date Adjustment	0 days		
Task Details	New repair needs to be completed		

Care plan annual follow up

Rule	Care plan sold – annual follow up		
Trigger Type	Sale Committed		
Trigger	Care Plan Sold		
Filter	Item Filter	**General tab** Defaults (all blank)	**Type & Status tab** Defaults
Task Associate	The Assigned Associate		
Date Adjustment	12 months		
Task Details	Care plan sold – annual follow up		