Automations

The **Automations** tool is designed to automatically keep your **Customers** in the loop about the status of their work order in the service department.

How Automations Work

1. As a work order moves through the shop, **Automations** will watch Infinity for status changes.
2. Once a change is detected, this will trigger **Automations** to check if you have set up an Automation for that status.
    a. Infinity will trigger **Automations** based on the status of each individual Action Item on a Work Order.
    b. This means that a customer may receive more than one Automated message for each work order.
3. If you have an Automation for that status, a message (email or text) will be queued according to your template.
4. On the hour all queued emails and texts will be sent.
    a. If the action item is taken out of a triggering status before this, no message will be sent.

Creating an Automation Template

1. Open the **Automations** screen using the menu on the left side of the screen to select **Settings** > **Automations**.
    a. The Automation Setting drawer opens.
    b. Any configured Automation settings will display.
2. Use the Create Automation button at the top of the screen to begin creating a new **Automation**.
    a. The Location Setting drawer opens.
3. Fill in the required information:
    a. *Location*: If you have multiple business locations, which one is this Automation going to work for?
    b. *Department*: Which department texting phone number will send this message (does not impact emails).
    c. *Status Trigger*: Which status in the service department will trigger the Automation process?
        i. This is the most important selection on this screen, since this will decide when to send messages.
        ii. Only one Automation can be created for each *Status Trigger*.
    d. *Subject*: The subject line used if sending an email message.
    e. *Message*: This is where you create the message template you want **Automations** to send to your customer for this *Status Trigger*.
        i. Use the Add Merge Tag button ( ) to include personalized information like the customer name, invoice number, etc.
        ii. Make sure to include any action you want your customers to take: Call the shop, text this number, please retrieve your unit, etc.
        iii. Because each Action Item can trigger its own message, make sure to include tags like @JobID and @JobStatus, and make clear this message may only refer to *part* of the customer's work order.

f. *Message Type*: Is this going to be sent as a Text, Email, or Both?
g. *Active*: This Automation will only send to customers if *Active*.
    i. You can always build multiple **Automations** before activating them, or deactivate an Automation later.

Reviewing Automations Function

1. Open the **Automations** screen using the menu on the left side of the screen to select **Settings** > **Automations**.
    a. The Automation Setting drawer opens.
    b. Any configured Automation settings will display.
2. To view the queue of messages that are waiting to be sent at the next hour, select the Emails Ready to Send or SMS Ready to Send buttons.
    a. A list of queued emails or text messages displays.
3. To review messages that have been sent to your customers, select the Email Logs or SMS Logs buttons.
    a. The archive of sent emails or text messages displays.