

ClubRunner

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What are Automation tasks?

Mickey D. - 2022-10-21 - [Membership Success](#)

Automation tasks are the emails that automatically get sent by the ClubRunner system to all prospective members, these are sent at pre-determined intervals. For example even if the club takes no action, our system can send the prospect an automated email after they fill out the online application, then 3 days after, then 1 week after, then 1 month after and so on. This keeps the prospect engaged during the process. The club can turn this automation on or off.

Each automation task has an email template associated with it. The "3 day" email may offer different information than the "1 week" email.

Note: At this time no new automation tasks can be created by the club, though this is a feature our team is working to introduce in the future.

In the list of automation tasks if you click the **down arrow** icon beside any task, four options appear.

1. **Change Template:** you can edit the associated email template for the task.
2. **History:** if this task has been enabled, this will show its entire history of actions over time.
3. **Make Inactive (or Make Active):** the automation task can be enabled or disabled.
4. **Generate 1 Time:** run this automation task just once, even if it is disabled.

The screenshot displays the ClubRunner web application interface. The top navigation bar includes links for Admin, My ClubRunner, Communication, Bulletin, Attendance, New Bulletin (Beta), Contacts, Membership, Organization, RI Integration, Website, New Website (Beta), Reports, Events, Volunteers, and Donations. The left sidebar contains a 'Help' section with 'Membership Success' selected, and a 'Settings' section with 'Automation Tasks' highlighted by a red box. The main content area shows a green notification bar stating 'Task was enabled'. Below this is the 'Automation' section with a search filter. A table lists automation tasks with columns: Name, Last Time Executed On, Last Time Affected Entities, Next Run On, and Actions. The first task, '[To Prospect] Automated Campaign 1 month after', has a dropdown menu open in the Actions column, showing options: Change Template, History, Make Inactive, and Generate 1 Time. The 'Active' status of the first task is also visible.

Name	Last Time Executed On	Last Time Affected Entities	Next Run On	Actions
[To Prospect] Automated Campaign 1 month after	never	N/A	Apr 26, 2022 at 10:00 AM	Active
[To Prospect] Automated Campaign 1 week after	Apr 25, 2022 at 10:00 AM	N/A	N/A	
[To Prospect] Automated Campaign 3 months after	Apr 25, 2022 at 10:00 AM	N/A	N/A	