

What are Automation tasks?

Mickey D. - 2022-10-21 - Membership Success

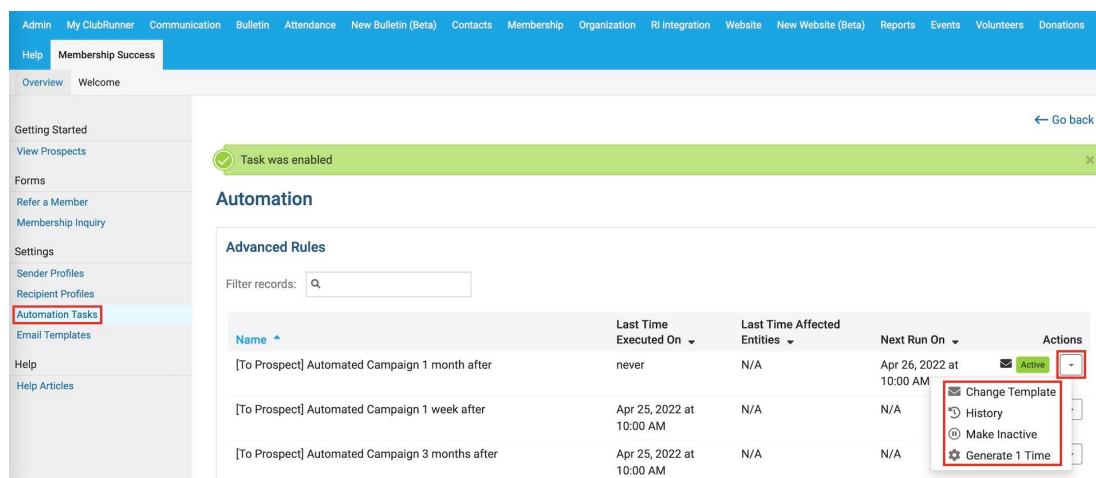
Automation tasks are the emails that automatically get sent by the ClubRunner system to all prospective members, these are sent at pre-determined intervals. For example even if the club takes no action, our system can send the prospect an automated email after they fill out the online application, then 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 shows the ClubRunner interface with the following elements:

- Top navigation bar: Admin, My ClubRunner, Communication, Bulletin, Attendance, New Bulletin (Beta), Contacts, Membership, Organization, RI Integration, Website, New Website (Beta), Reports, Events, Volunteers, Donations.
- Sub-navigation: Help, Membership Success.
- Left sidebar: Overview, Welcome, Getting Started, View Prospects, Forms, Refer a Member, Membership Inquiry, Settings, Sender Profiles, Recipient Profiles, Automation Tasks (highlighted), Email Templates, Help, Help Articles.
- Main content area: Automation Tasks page. A green notification bar at the top says "Task was enabled". Below it is the "Automation" section with "Advanced Rules" and a "Filter records:" search box.
- Table of Automation Tasks:

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	Change Template, History, Make Inactive, Generate 1 Time
[To Prospect] Automated Campaign 3 months after	Apr 25, 2022 at 10:00 AM	N/A	N/A	