

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 for managing automation tasks. The navigation menu on the left includes sections like 'Getting Started', 'Forms', 'Settings', and 'Automation Tasks' (which is highlighted). The main content area is titled 'Automation' and contains an 'Advanced Rules' section with a search filter. Below this is a table of automation tasks. The table has columns for Name, Last Time Executed On, Last Time Affected Entities, Next Run On, and Actions. The first task is '[To Prospect] Automated Campaign 1 month after', which is currently active. A dropdown menu is open for this task, showing four options: 'Change Template', 'History', 'Make Inactive', and 'Generate 1 Time'. A green notification banner at the top of the main content area indicates 'Task was enabled'.

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	