

## What are Automation tasks?

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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 'Automation Tasks', which is currently selected. The main content area displays a table of automation tasks under the heading 'Automation' and 'Advanced Rules'. A filter records search box is present above the table. The table has the following columns: 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	