Mission Control: Automated Actions

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Automatic Actions

Automatic Actions help ensure that documents are moved through the workflow if they meet the criteria listed in the given queue, which helps reduce manual checks and reviews. This gives business owners more confidence that their workflows are moving orders through the pipeline, and it provides greater control to the entire process flow.

Below is an example of how Automatic Actions can enhance the business process:

- Documents that are waiting on items that have been backordered sit in a Backorder Queue.

- On a regular interval, checks are made to see if the backordered inventory has been received by the warehouse and can therefore be allocated.

- When the inventory is logged into the system, the next run of the Automatic Action will:

    - see the available inventory,

    - allocate those items to the orders that were waiting for them, and

    - then send them over to be picked.

Setting Up Automatic Actions

After clicking the Automatic Actions tab, which is located on the right hand side of the screen below the Business Rules tab, the user will see all automatic actions that have been previously created. Similar to business rules, clicking the "+" button will open up the New Automatic Action form.

On this screen, users will need to fill out the name of the automatic action and to which queues it will apply. When the automatic action is triggered, all documents that meet the outlined conditions will be transitioned to the next configured queue. This will allow for continued movement for documents that are waiting in a given queue but now meet the criteria to continue on in workflow.

New Automatic Action

What's the name of this automatic action?

Fully Paid

How would you describe this automatic action?

Forward When Paid

↳ Documents will be **submitted to the next queue** when the automatic action executes.

◆ Which **Condition(s)** trigger this automatic action?

| A field from the order ⌄ | Balance ⌄ | is equal to ⌄ | 🗑 |
| A certain amount ⌄ | 0.00 | | |

Add Condition +

▪ Which **queues** should this automatic action apply to?

▪ Select queues ⌄

🔵 Enable automatic action.

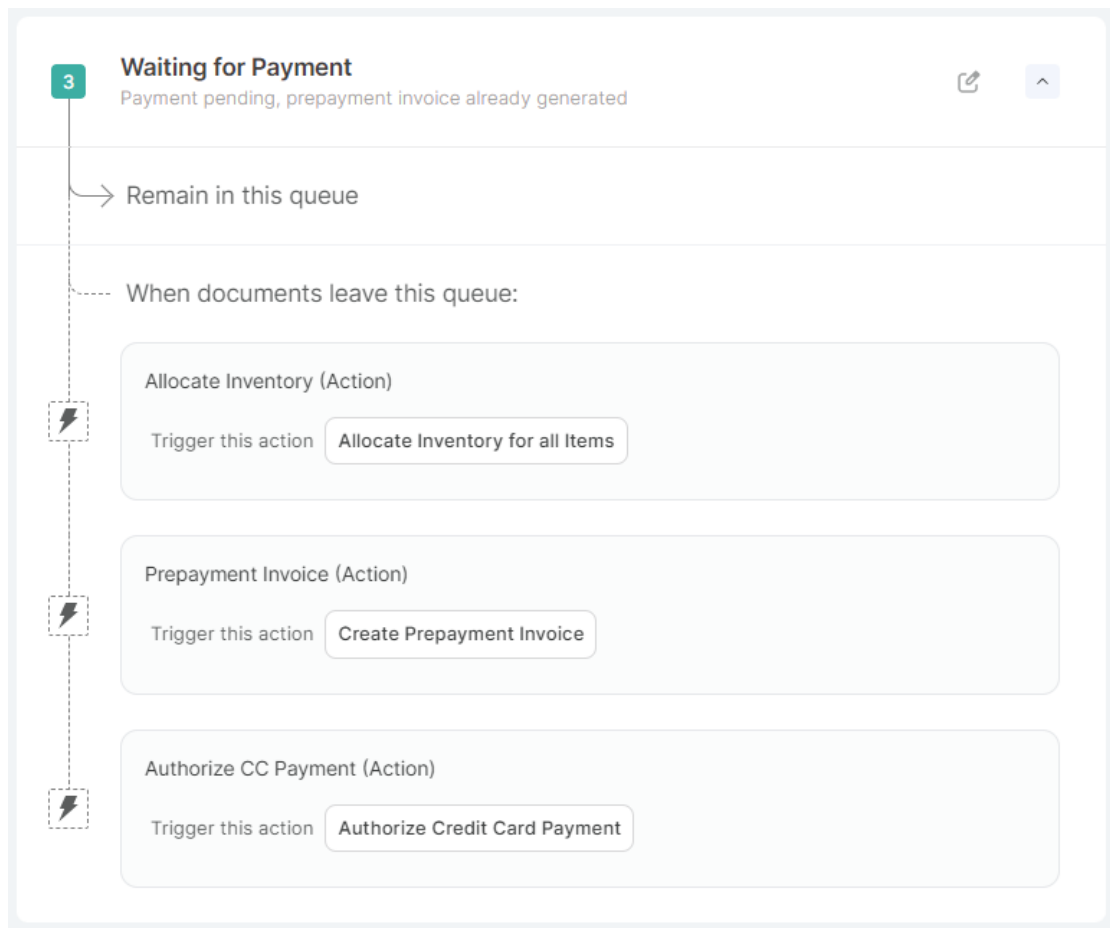Check for condition(s) every [15 minutes ⌄] ⓘ   Cancel   **Save**

Similar to any new or changed business rules, these changes will need to be saved and published before they take effect.

Example Automatic Action

Combining Automatic Actions and Alternate Path Actions can lead to a powerful processing engine that can allocate inventory, create a prepayment invoice, and authorize a credit card payment all in one action as the document sits in a "Waiting for Payment" queue. This could be accomplished by setting up the following in workflow:

Queue Setup:

Waiting for Payment
3   Payment pending, prepayment invoice already generated

→ Remain in this queue

When documents leave this queue:

Allocate Inventory (Action)

Trigger this action   Allocate Inventory for all Items

Prepayment Invoice (Action)

Trigger this action   Create Prepayment Invoice

Authorize CC Payment (Action)

Trigger this action   Authorize Credit Card Payment

Automatic Action Setup:

← **Prepayment/Allocate**

Setup   Action Log

What's the name of this automatic action?

Prepayment/Allocate

How would you describe this automatic action?

Prepayment Collected & Invetory Allocated

↳ Documents will be **submitted to the next queue** when the automatic action executes.

◆ Which **Condition(s)** trigger this automatic action?

Add Condition +

◼ Which **queues** should this automatic action apply to?

◼ Waiting for Payment   ✕   ⌄

Delete

Check for condition(s) every   24 hours   ⌄   ?   Cancel   **Update**