



Eaco Triggers

USER GUIDE

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INTRODUCTION

"Innovation distinguishes between a leader and a follower" - Steve Jobs

It's time to create some magic. To make something appear out of nowhere, all whilst not moving a single finger. That is the power of Triggers in Eaco and now that power is now in your hands.

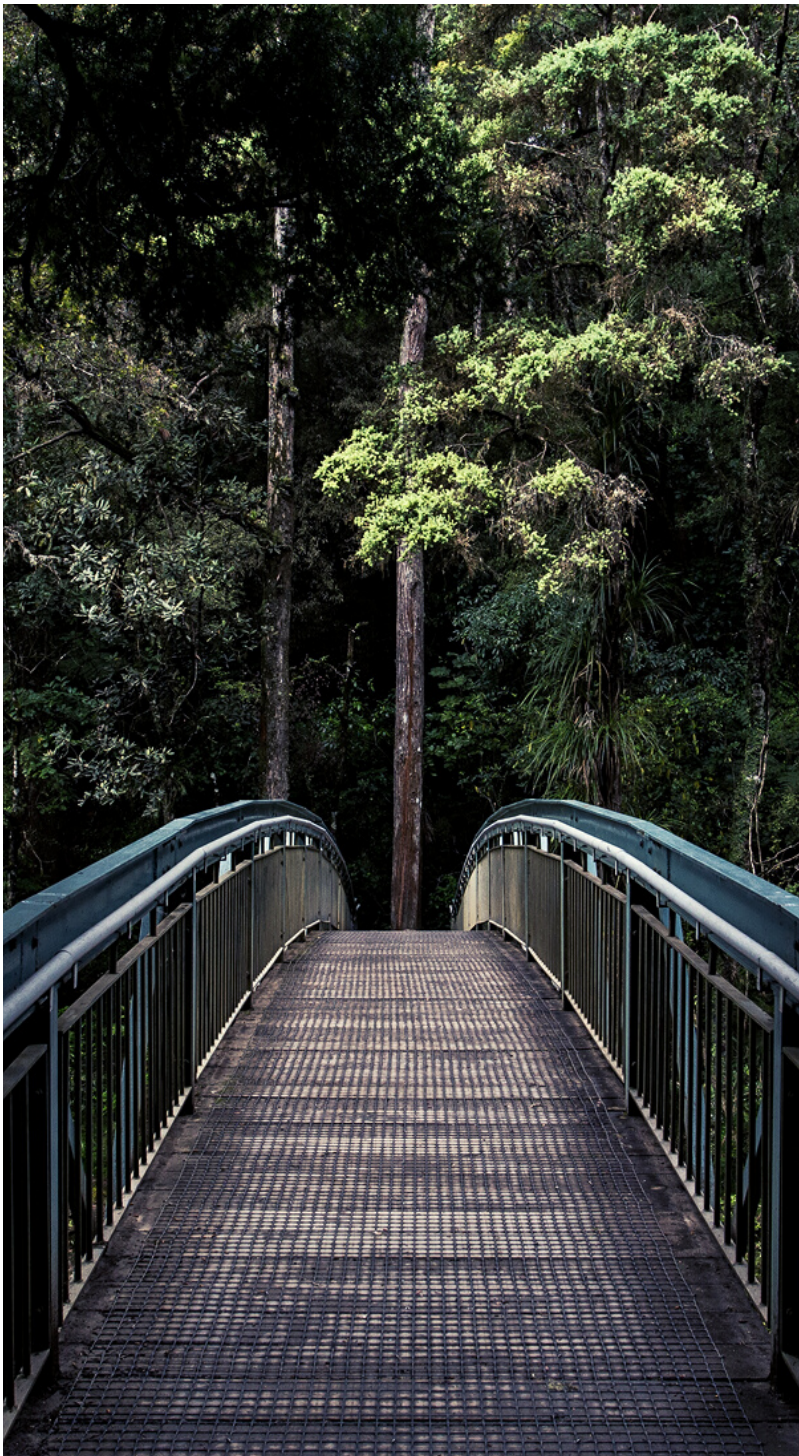
So what is the Triggers feature and when are you going to use it? Triggers is the bridge between what has happened and the next step. In tech speak, Triggers provides you with the ability to automate next step actions when events occur and certain conditions are met. In everyday language, Triggers is about progressing a job automatically. The business gurus of today would call Triggers "automations".

Eaco's Triggers enable you to automate what happens next when something happens to a Job. Examples are endless - here are some ideas on how they can help automate your work:

- When a job is accepted by a Supplier, an SMS tracking link can be automatically sent to a customer, which will enable the customer to monitor the movements and ETA of a supplier.
- When a Supplier checks into site, a Trigger can be set to provide the appropriate set of Tasks that will need to be performed in order to complete the job successfully.
- When a Job is complete, an invoice can be created automatically and sent to the client.

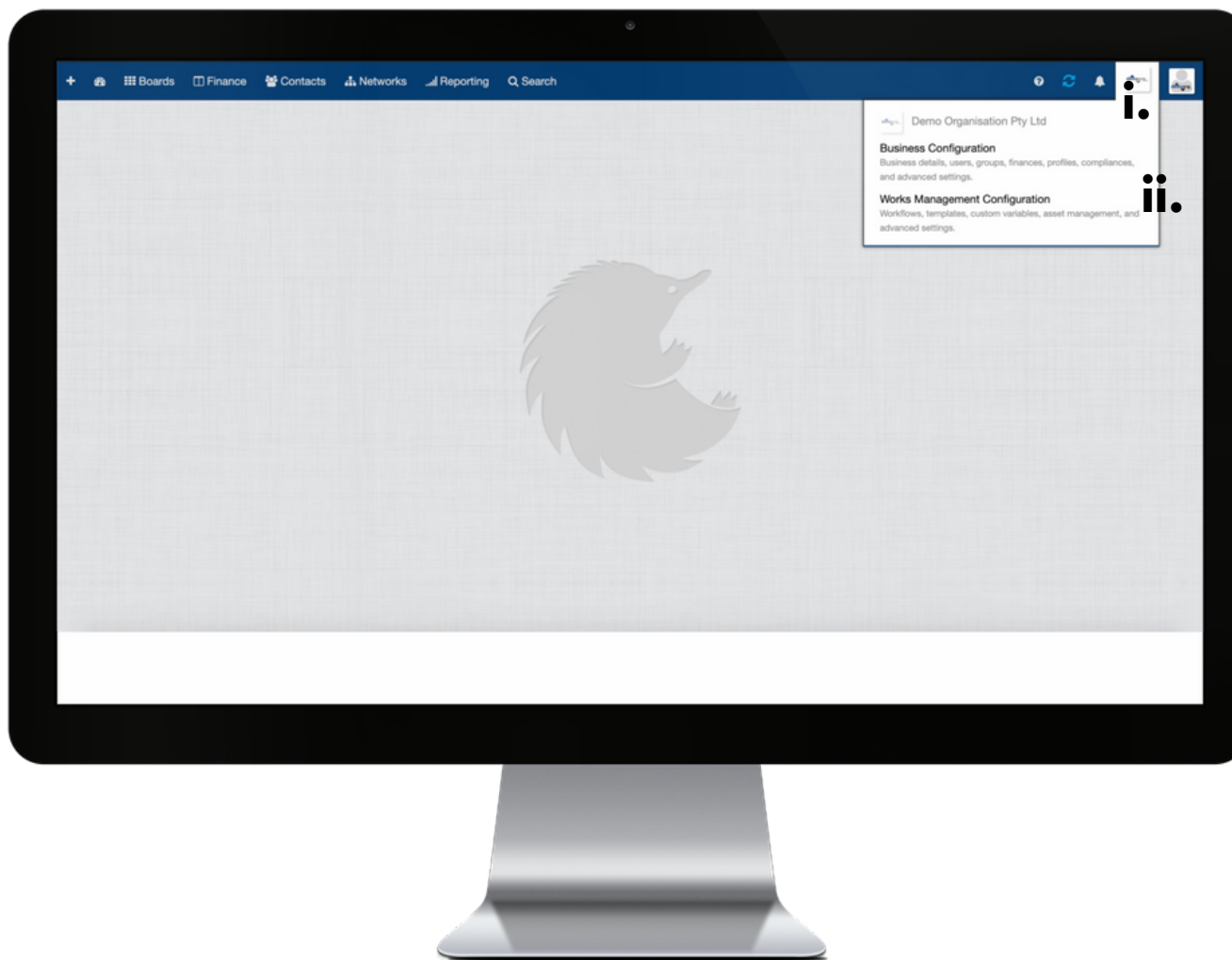
This level of automation is what wows your customers with your responsiveness; and it's what drives long-term loyalty. All whilst reducing the administrative overheads associated with running your business.

#embraceefficiency



ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE

1. GET STARTED

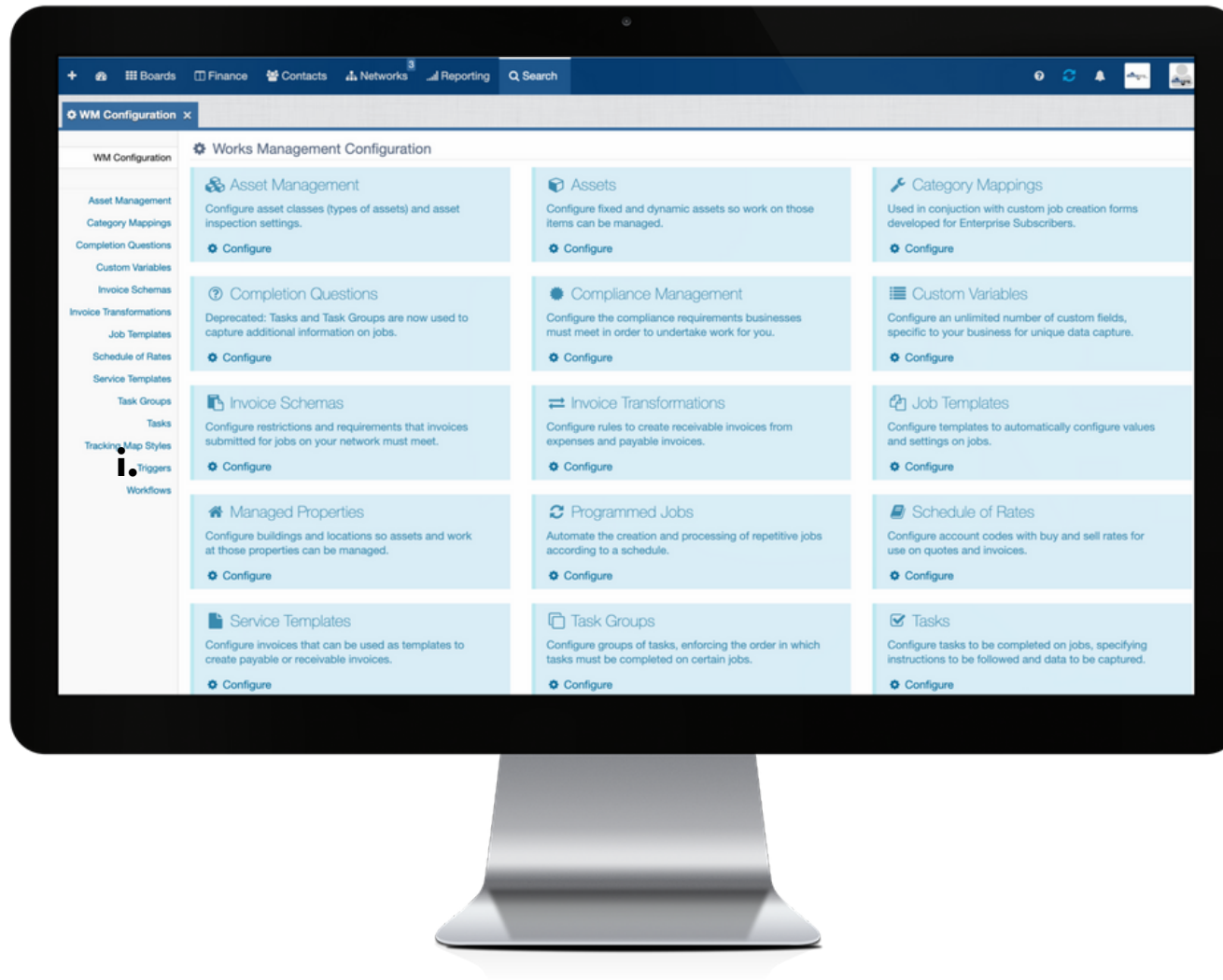


Establish the settings for your Triggers feature via your organisation's Works Management Configuration (WM Configuration) section.

Your WM Configuration section can be found by clicking on the icon (i) for your Organisation's Profile and then selecting the Works Management Configuration from within the drop down menu (ii).

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2. WM CONFIGURATION



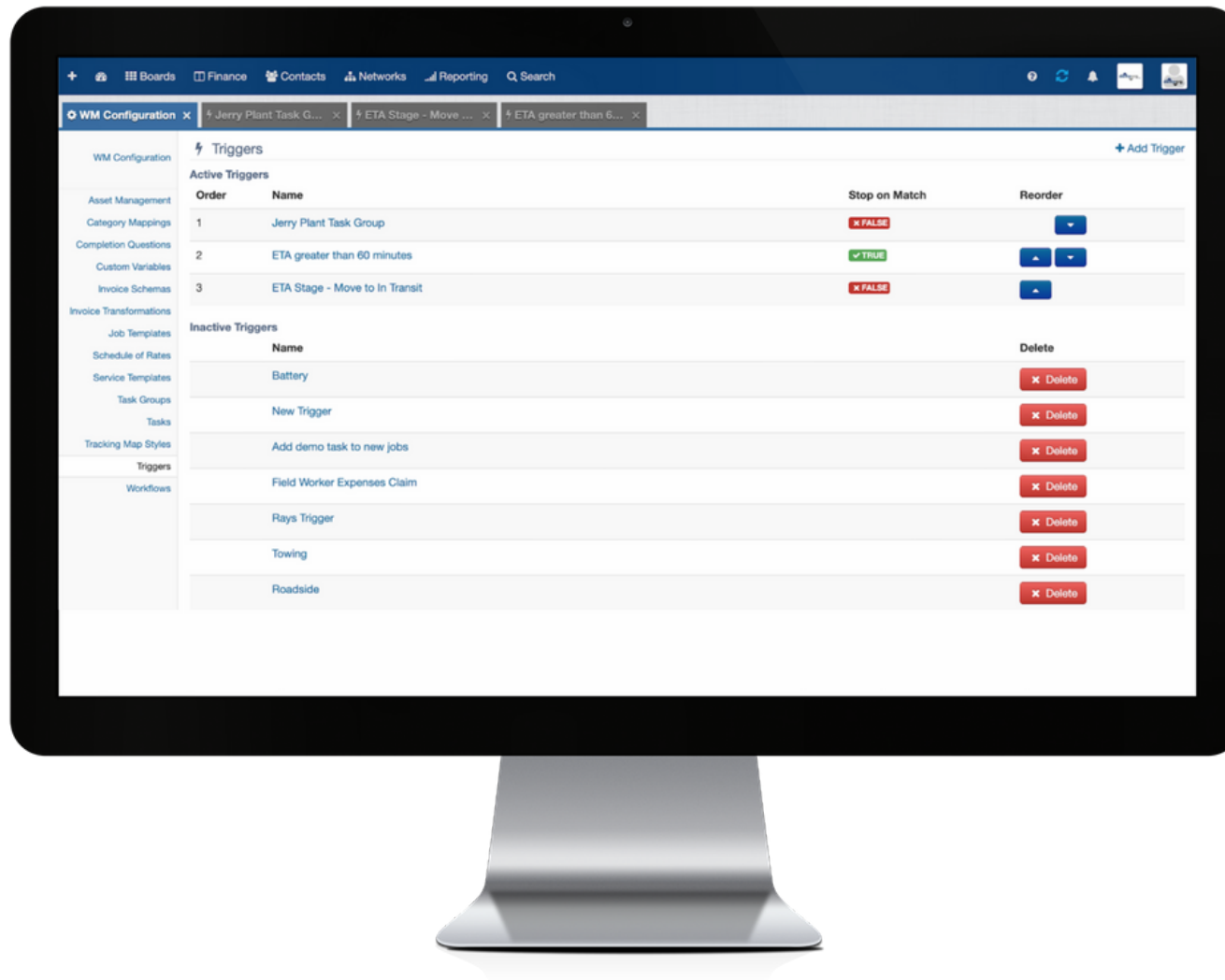
i: To commence establishing the settings for your Triggers feature, click on Triggers in the left hand menu.

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COMMUNICATE AND
OPTIMISE



3. SETTINGS: MAIN VIEW





Configure settings to create automations to initiate actions when events occur and certain conditions are met.

Legend: main view of Triggers settings page

Active Triggers: lists the established Triggers that are in use.

Order: indicates the order in which the Active Triggers will be executed.

Name: this is the Name of the established Trigger.

Stop on Match: indicates at what point in time, the activation of Triggers will cease (e.g. if there are four Active Triggers and Stop on Match applies to Trigger 2, then Triggers 3 and 4 will not run).

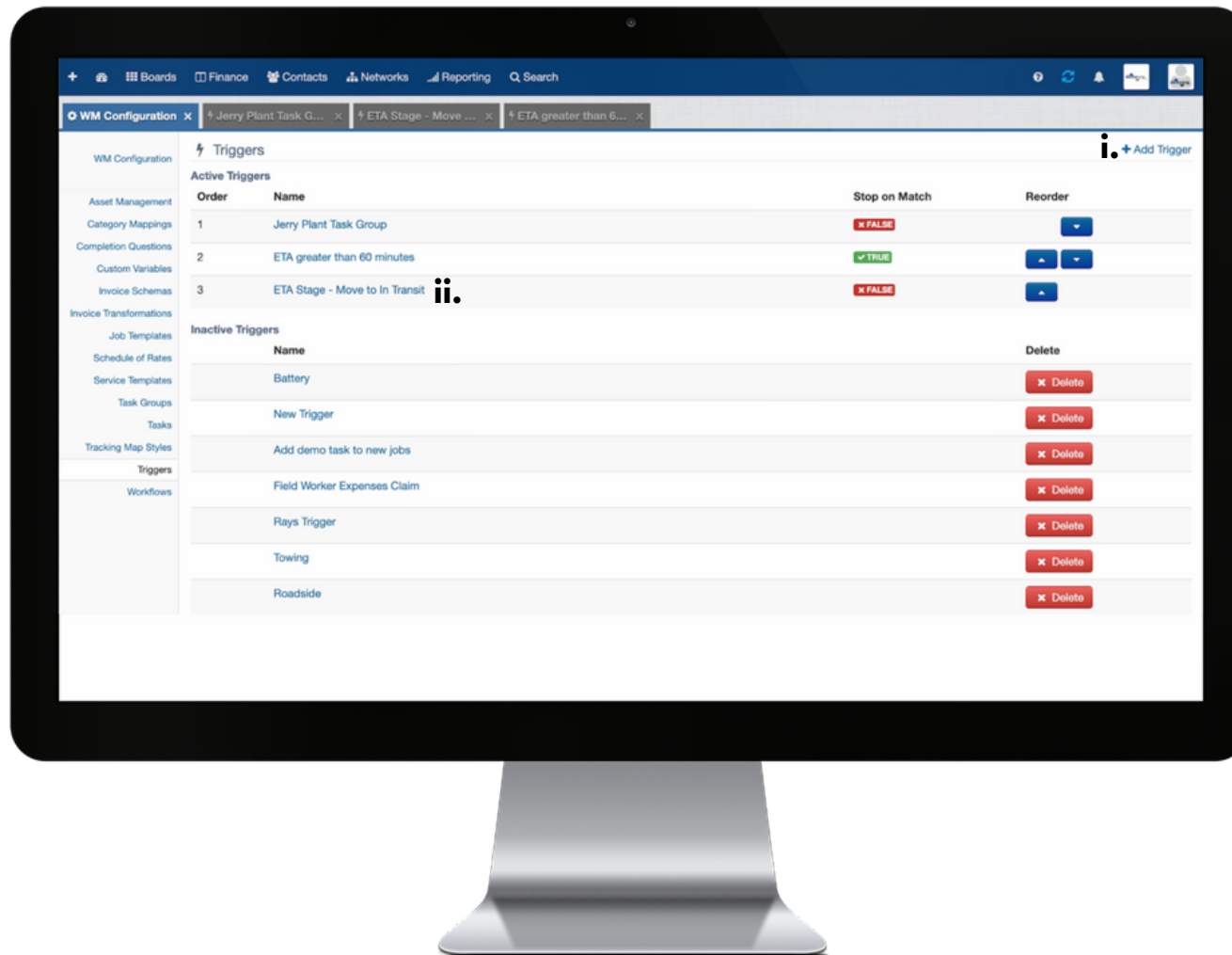
Reorder: enables you to rearrange the order in which the Active Triggers are to run.

Inactive Triggers: lists the established Triggers that are not in use.

Delete: enables you to Delete a Trigger (note an Active Trigger must be made Inactive to enable deletion).

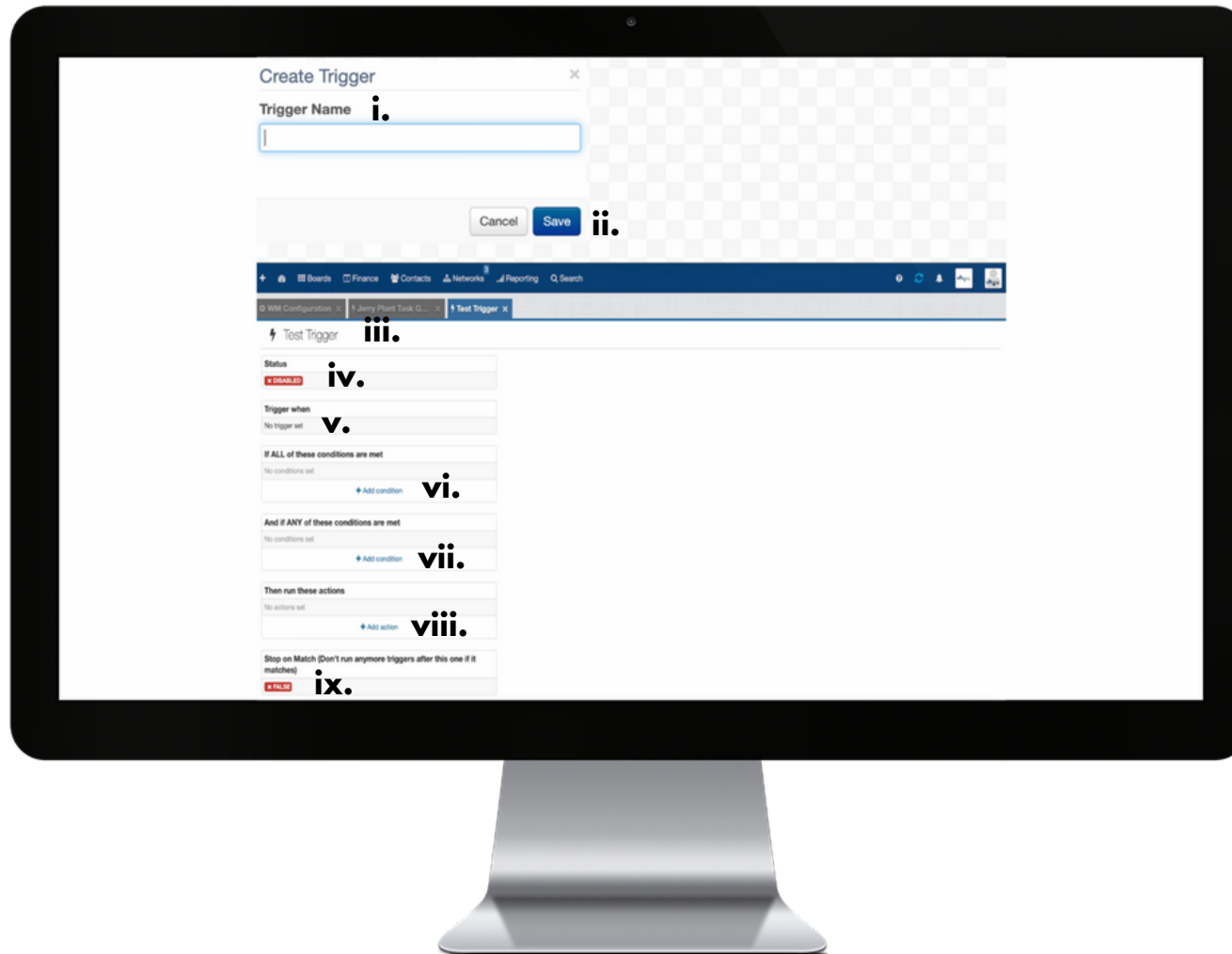
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4. ADD A NEW/EDIT A TRIGGER



i: click the + icon to open the add Trigger dialog box; or

ii: to edit the details of an existing Trigger, click the name to open the Trigger dialog box.



- i:** complete this field to apply a Name to the Trigger.
- ii:** click Save to confirm creation of the Trigger.
- iii:** click here to edit the Name of the Trigger.
- iv:** click this field to set the Trigger to Active or Inactive (Disabled).
- v:** click this field to set when the Trigger should execute - upon clicking this field, a pop up menu containing your list of Trigger events (e.g. Trigger will run when a New Job Is Posted) will appear.
- vi:** click Add Condition to add ALL conditions that must be met in order for the Trigger to run. Repeat this process to add more than one Condition.
- vii:** click Add Condition to add a list of ANY other conditions that must be met in order for the Trigger to run (i.e. the Trigger will run even if only one of these Conditions is met in conjunction with all Conditions that must be met). Repeat this process to add more than one Condition.
- viii:** click Add Action to add what action should be taken when the set Trigger conditions are met. Repeat this process to add more than one Action.
- ix:** click this field to set whether or not (True or False) Triggers should Stop running if this Trigger is matched.