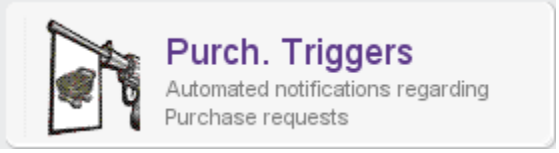
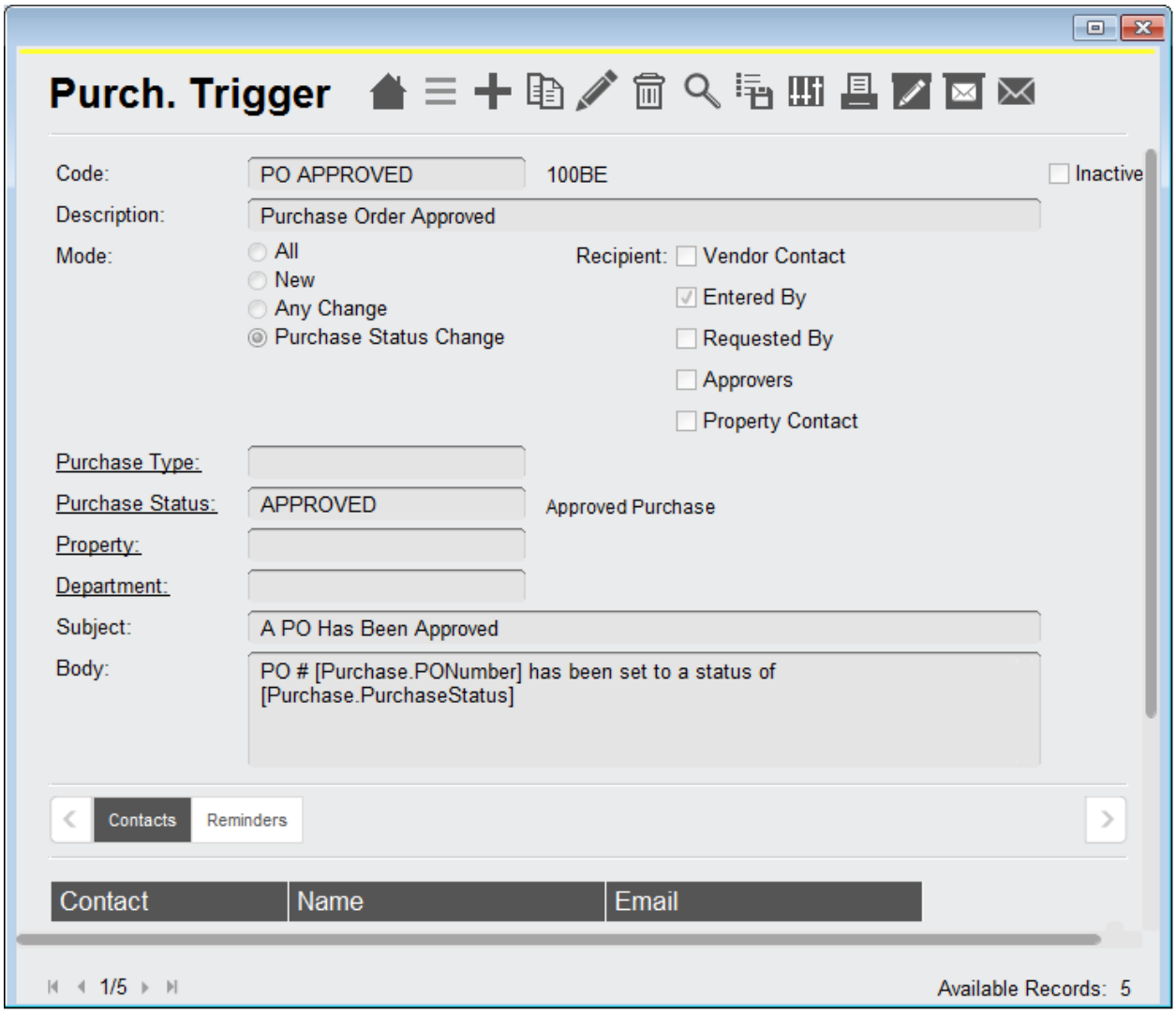
Purchase Triggers

The Purchase Triggers capsule allows you to send automated emails depending on your specific set up.





Similar to Work Triggers, the details associated with the specific purchase record can define the creation of the trigger. Triggers can be configured based upon the Purchase Type, Status, Property, and Department.

Mode

- **All** – a trigger will be created if the Work order is new to the system, has any change or a Work Status change
- **New** – a trigger will be created if the work order is new to the AwareManager jxt
- **Any Change** – a trigger will be created if there is any change made to the Work record
- **Purchase Status Change** – a trigger will be created if there is a change in the Work Status of the Work record as defined in the Status field of the Trigger.

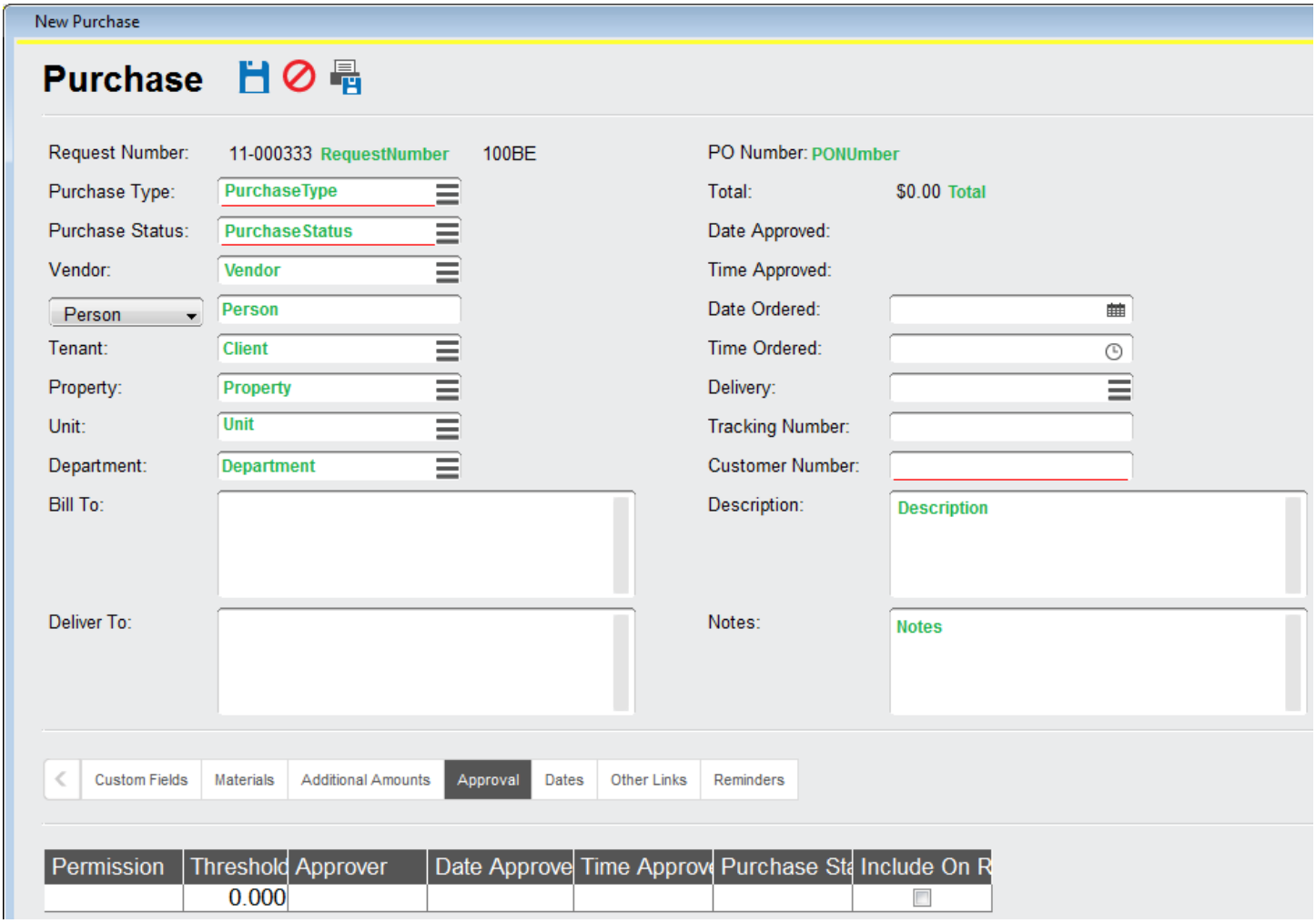
Recipient

- **Vendor Contact** – the contact linked to the purchase record
- Note: only if there is an email address in their contact record
- **Entered By** – the staff contact who entered the purchase record
- **Requested By** – the contact who requested the purchase record
- **Approvers** – the list of approvers for the purchase record
- **Property Contact** - the contact linked to the property record (typically the property manager or chief engineer)
- **Contacts Tab** – you can also enter specific contacts on the contacts tab

Subject / Body fields

The Subject and Body fields can reference any fields from the Purchase capsule.

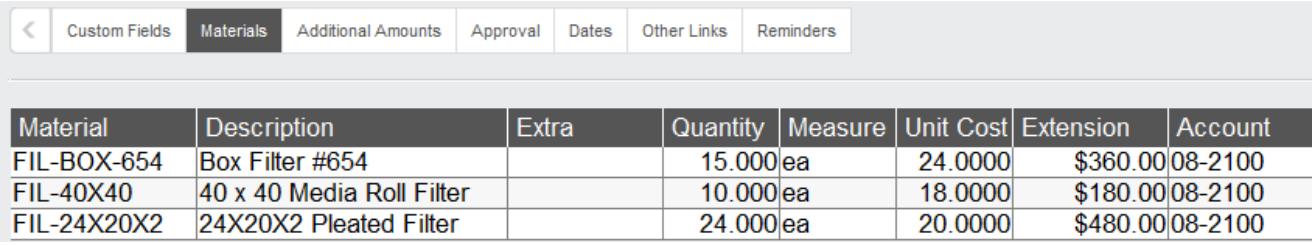
The most commonly referenced fields are as follows:



Other Links: Work, Contract, Project, EnteredBy.Name
Custom Fields: Custom Field01, Custom Field 02, etc.
Notes:

- If the default terminology has been changed the trigger must reference the original AwareManager jxt term (i.e. Tenant = Client)
- Field references must be entered in the format [*capsule.field name*] e.g. [Purchase.DateApproved]

A Purchase Trigger can also reference any of the **detail tables** found on the tabs at the bottom of the Purchase form. You can also choose to add individual columns from the various tables as well, such as Purchase # from the Materials tab.



Material	Description	Extra	Quantity	Measure	Unit Cost	Extension	Account
FIL-BOX-654	Box Filter #654		15.000	ea	24.0000	$360.00	08-2100
FIL-40X40	40 x 40 Media Roll Filter		10.000	ea	18.0000	$180.00	08-2100
FIL-24X20X2	24X20X2 Pleated Filter		24.000	ea	20.0000	$480.00	08-2100

The full list of detail tables and their available individual columns:

[Purchase.Detail:PurchaseMaterials.Quantity]
[Purchase.Detail:PurchaseMaterials.Description]
[Purchase.Detail:PurchaseMaterials.Material]
[Purchase.Detail:PurchaseMaterials.Measure]
[Purchase.Detail:PurchaseMaterials.UnitCost]
[Purchase.Detail:PurchaseMaterials.Extension]
[Purchase.Detail:PurchaseMaterials.Account]
[Purchase.Detail:PurchaseMaterials.Part]
[Purchase.Detail:PurchaseAmounts.Account]
[Purchase.Detail:PurchaseAmounts.Description]
[Purchase.Detail:PurchaseAmounts.Markup]
[Purchase.Detail:PurchaseAmounts.Cost]
[Purchase.Detail:PurchaseApprovals.Permission]
[Purchase.Detail:PurchaseApprovals.Threshold]
[Purchase.Detail:PurchaseApprovals.Approver]
[Purchase.Detail:PurchaseApprovals.DateApproved]
[Purchase.Detail:PurchaseApprovals.TimeApproved]
[Purchase.Detail:PurchaseApprovals.PurchaseStatus]
[Purchase.Detail:PurchaseApprovals.IncludeOnReport]
[Purchase.Detail:Reminder.ReminderType]
[Purchase.Detail:Reminder.Recipient]
[Purchase.Detail:Reminder.ReminderTrigger]
[Purchase.Detail:Reminder.Notes]

Example of Material Detail Table

Materials: Purchase Inventory	Material	Description	Quantity	UnitPrice	Charge	Cost	UnitCost	
	TEST	Test	17	3	51	0	0	
	TILES-FLOOR	Floor Tiles (Restrooms)	15	5	75	0	0	
	FAUCET	Faucet	1	2	2	0	0	
0081 2.45	ELEC-SWITCH-D-C	Wall Switch - double cream	23		3	69	56.35	