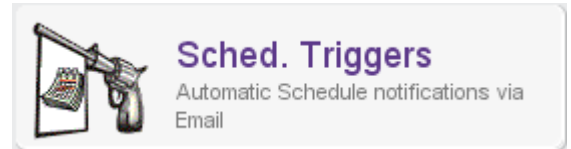


Schedule Triggers

The Schedule Triggers capsule allows you to establish automated emails that will email the selected contact(s) depending on the specific set up.



Triggers can be entered that are very broad in nature (no specification regarding Schedule Type, Status, Department, etc.), or they can be targeted based on the criteria entered.

Source

- **All** – a trigger will be created by all schedules entered either by Capsule, Maintenance or the Web.
- **Capsule** – a trigger will be created only by schedules entered directly into the Schedule capsule.
- **Web** – a trigger will be created only by schedules entered from the web.

Mode

- **All** – a trigger will be created if the schedule is new to the system or if an existing schedule is saved with any values changed.
- **New** – a trigger will be created when a new schedule record is saved.
- **Any Change** – a trigger will be created if there is any change made to the schedule.
- **Sched. Status Change** – a trigger will be created only if the record is saved with a change to the *Schedule Status*; in this case the trigger typically indicates the specific status change which will initiate it (via the *Sched. Status* field of the trigger), but this is not required.

Triggers can be sent to

- **Schedule Contact** – the person who requested the schedule.

Note: only if there is an email address in their contact record, or their email address is entered into the Schedule Contact field of the schedule

- **Contacts tab** – you can also enter specific contacts into the Detail List.

Contact	Name	Email
BIRCH.MABLE	Mable Birch	mbirch@pilgrimspridefurniture.com

Subject / Body fields

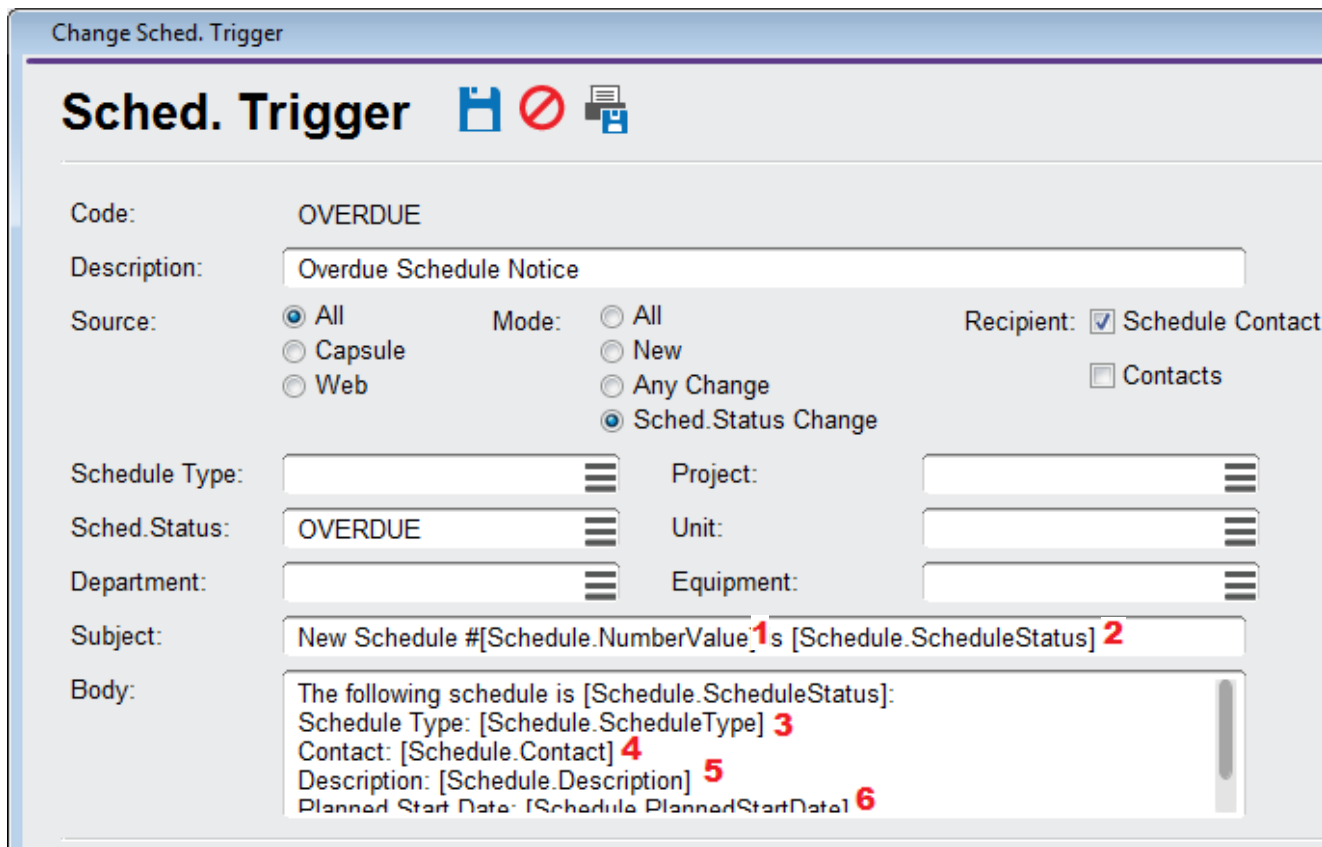
The Subject and Body fields can reference fields from the Schedule capsule.

Note: If the default terminology has been changed the trigger must reference the original AwareManager jxt term (i.e. Tenant = Client).




All fields must be entered in square brackets and be prefaced with the capsule name, thus: **[Schedule.NumberValue]**.

Schedule Trigger Example:

In this example an email is sent to the Contact listed on a schedule whenever its Status is changed to OVERDUE:



Change Sched. Trigger

Sched. Trigger   

Code: OVERDUE

Description: Overdue Schedule Notice

Source: All Capsule Web

Mode: All New Any Change Sched. Status Change

Recipient: Schedule Contact Contacts

Schedule Type: Project:

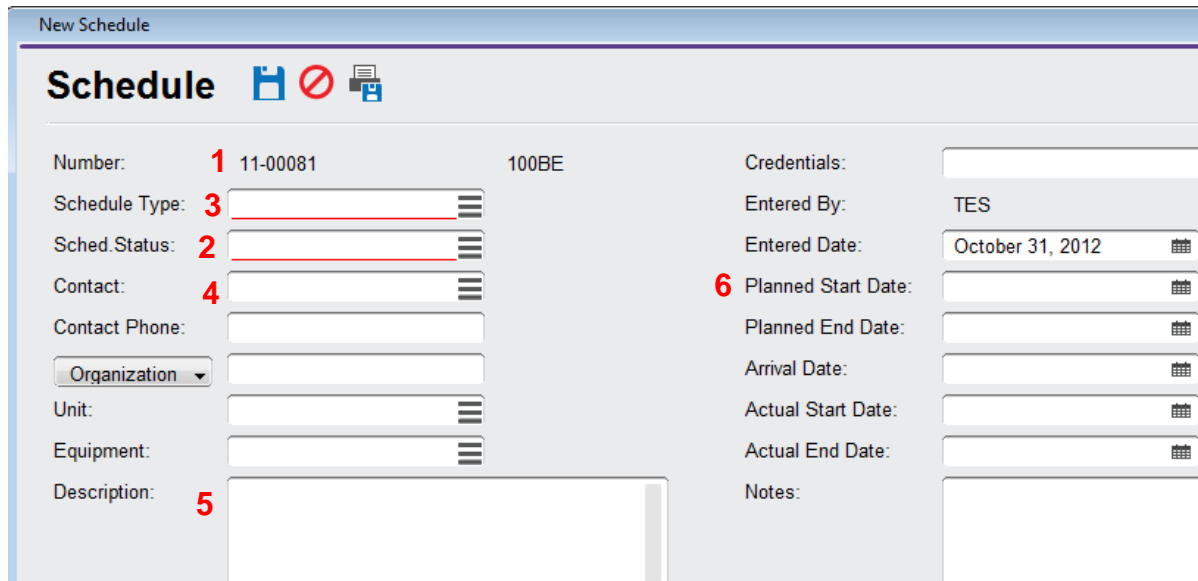
Sched. Status: OVERDUE Unit:

Department: Equipment:




Subject: New Schedule #[Schedule.NumberValue]¹s [Schedule.ScheduleStatus]²

Body: The following schedule is [Schedule.ScheduleStatus]:
 Schedule Type: [Schedule.ScheduleType]³
 Contact: [Schedule.Contact]⁴
 Description: [Schedule.Description]⁵
 Planned Start Date: [Schedule.PlannedStartDate]⁶

These correspond to the Schedule fields as follows:



New Schedule

Schedule   

Number: **1** 11-00081 100BE Credentials:

Schedule Type: **3**

Sched. Status: **2**

Contact: **4**

Contact Phone:


Organization:


Unit:


Equipment:


Description: **5**


Entered By: TES


Entered Date: October 31, 2012 

6 Planned Start Date: 

Planned End Date: 

Arrival Date: 

Actual Start Date: 

Actual End Date: 

Notes:

Schedule Triggers can also reference detail tables found on the tabs at the bottom of a Schedule Form.

Here is a list of available detail table lines that can be added to a Schedule Trigger:

- [Schedule.Detail:ScheduleMaterials.Material]
- [Schedule.Detail:ScheduleMaterials.Description]
- [Schedule.Detail:ScheduleEquipment.Description]
- [Schedule.Detail:ScheduleAmounts.Account]
- [Schedule.Detail:ScheduleAmounts.Description]
- [Schedule.Detail:ScheduleAmounts.Charge]
- [Schedule.Detail:ScheduleAmounts.Cost]
- [Schedule.Detail:ScheduleContacts.Contact]
- [Schedule.Detail:ScheduleMaterials.Quantity]
- [Schedule.Detail:ScheduleEquipment.Equipment]