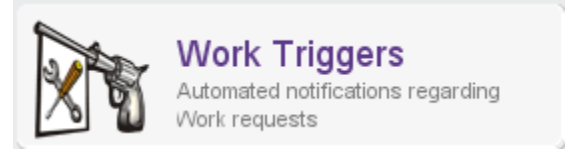


The Work Triggers capsule allows you to establish automated emails that will be sent to the selected Contact(s) depending on the specific setup.



Triggers can be very broad in nature, or they can be targeted to Work orders of a specific Work Type, Status, Category, Building, Tenant, or Department.

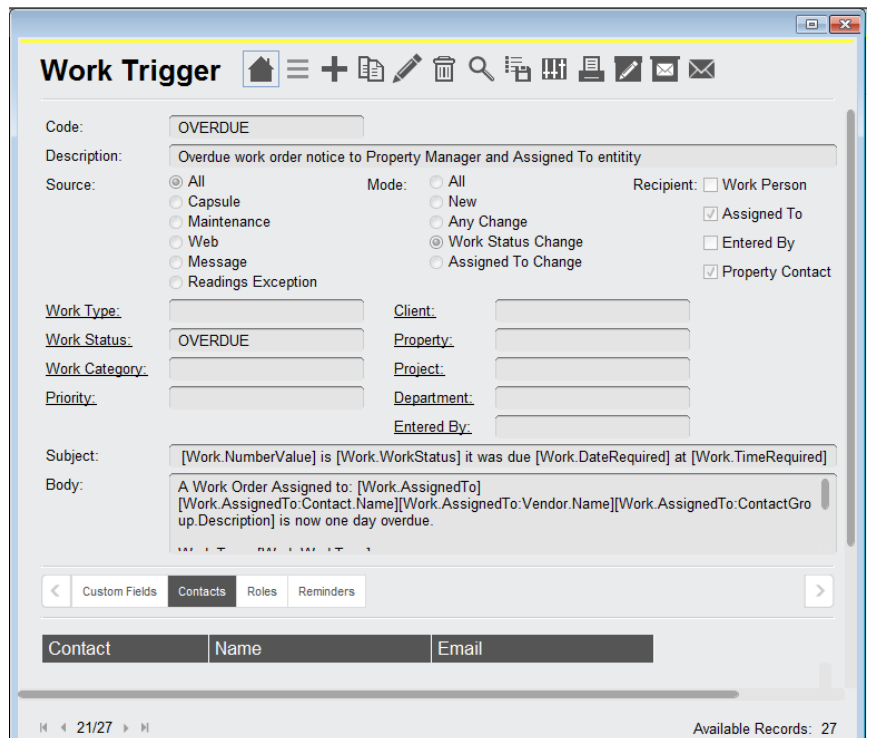
The Body and Subject of a trigger are where you determine what the email will say. You can use tags to reference specific information from each Work order:

- To reference fields within the given capsule, use **[Capsule.Field]** (.e.g. **[Work.NumberValue]**).
- To reference linked field values, use **[1stCapsule.Field:2ndCapsule.Field]**. For example, if you want to reference the Name of the Client linked to a Work order, you would use **[Work.Client:Client.Name]**.
- To reference Multiple Link Field values, use the above syntax to reference linked field values separately for every link.

For example, if it's the Assigned To field in the Work capsule, use:

- **[Work.AssignedTo]** – free form text field
- **[Work.AssignedTo:Contact.Name]** – Name of Contact
- **[Work.AssignedTo:Vendor.Name]** – Name of Vendor
- **[Work.AssignedTo:ContactGroup.Description]** – Description of Contact Group

In this example, the trigger will send a notification to the Assigned To and Property Contact when any work order's status is changed to OVERDUE.



**Work Trigger**

Code: OVERDUE

Description: Overdue work order notice to Property Manager and Assigned To entity

Source:  All  Capsule  Maintenance  Web  Message  Readings Exception

Mode:  All  New  Any Change  Work Status Change  Assigned To Change

Recipient:  Work Person  Assigned To  Entered By  Property Contact

Work Type:  Client:

Work Status: OVERDUE Property:

Work Category:  Project:

Priority:  Department:

Entered By:

Subject: [Work.NumberValue] is [Work.WorkStatus] it was due [Work.DateRequired] at [Work.TimeRequired]

Body: A Work Order Assigned to: [Work.AssignedTo] [Work.AssignedTo:Contact.Name][Work.AssignedTo:Vendor.Name][Work.AssignedTo:ContactGroup.Description] is now one day overdue.

Navigation: Custom Fields | **Contacts** | Roles | Reminders

Contact	Name	Email
[Empty Table]		

Page: 21/27 Available Records: 27

## Source

- **All** – a trigger will be created by all work orders entered either by Capsule, Maintenance, Web, Message, or Readings Exception.
- **Capsule** – a trigger will be created only by work orders entered directly into the Work capsule.
- **Maintenance** – a trigger will be created only by work orders entered by generating work from the Maintenance capsule.
- **Web** – a trigger will be created only by work orders entered from the web.
- **Message** – a trigger will be created only by a work order that was created from a text message.
- **Readings Exception** – a trigger will be created only by a work order that was created from a readings exception.

## 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 AwareManager.
- **Any Change** – a trigger will be created if there is any change made to the Work record.
- **Work 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.
- **Assigned To Change** – a trigger will be created if there is a change in the Assigned To of the Work record.

## Recipient

- **Work Person** – the person who requested the work.
- Note: only if there is an email address in their contact record, or their email address is entered into the Work Person field of the work order.
- **Assigned To** – the person (or vendor) the work has been assigned to.
- Note: the Vendor record must include a contact with an email address.
- **Entered By** – the AwareManager operator who entered the work order.
- **Property Contact** – the contact linked to the Property record (typically the property manager or chief engineer).
- **Contacts tab** – you can also enter specific contacts into the Detail List.

<	Custom Fields	<b>Contacts</b>	Roles	Reminders
Contact	Name	Email		
SPRAYER.SAL	Sal Sprayer	sally.sprayer@100beaconmg...		

- **Roles tab** – you can enter Project Roles on this tab; if the work that triggers the email is linked to a Project, this can ensure that Roles associated with the Project receive email notifications.

<	Custom Fields	Contacts	<b>Roles</b>	Reminders
Role	Description			
DEVELOPER	Developer			

Other commonly referenced fields:

New Work [Window Icons]

## Work

Number: 2566 NumberValue 100BE

Customers: Client [Menu]

Work Contact: [Dropdown] WorkPerson [Menu]

Phone: Phone

Property: Property [Menu]

Unit: Unit [Menu]

Floor: Floor

Workstation ID: [Text]

Department: Department [Menu]

Work Type: Work Type [Menu]

Priority: Priority [Menu]

Worker: [Dropdown] AssignedTo [Menu]

Description: Description [Text Area]

Posted

Work Category: WorkCategory [Menu]

Work Status: WorkStatus [Menu]

Entered: July 30, 2013 17:55

Received: [Text]

Scheduled: [Text]

Required: [Text]

Started: [Text]

Completed: [Text]

Closed: [Calendar Icon] [Clock Icon]

Posted: [Text]

Billable

Notes: Notes [Text Area]

Dates/Times:  
 DateEntered                      TimeEntered  
 Date Completed                  TimeCompleted  
 etc...

< Custom Fields **Related** Total Amounts Additional Amounts Time Materials Vendors Readings Tasks Other Links Mitigation Timestamps Files >

Alt Contact: CustomField01 [Text]

Alt Number: CustomField02 [Text]

Available Records: 0

**Other Links:** Contract, Project, Maintenance, Equipment, Department, EnteredBy.Name, WorkPerson:WorkPerson:Contact.Name, Property.Name

**Total Amounts:** TimeCharge, MaterialCharge, VendorCharge, AdditionalCharge, TotalCharge, TimeCost, MaterialCost, VendorCost, AdditionalCost, TotalCost

**IMPORTANT NOTES**

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 [Work.NumberValue].

**Work Trigger Examples**

A Work Trigger would be created every time the status of a Web request is changed to PENDING, and the Work Person would be notified with an email containing the Work Order Number and Work Status in the subject and Description in the Body.

**Work Trigger**

Code: PENDING 100BE

Description: Pending work order (Web Request)

Source:  All  Capsule  Maintenance  Web  Message  Readings Exception

Mode:  All  New  Any Change  Work Status Change  Assigned To Change

Recipient:  Work Person  Assigned To  Entered By  Property Contact

Work Type:  Client:

Work Status: PENDING Property:

Work Category:  Project:

Priority:  Department:

Entered By:

Subject: WO # [Work.NumberValue] is [Work.WorkStatus]

Body: New Work Order has been requested as follows:  
Description: [Work.Description]

Custom Fields | **Contacts** | Roles | Reminders

Contact	Name	Email

24/27 Available Records: 27

### Referencing Detail Tables

A Work Trigger can also reference any of the **detail tables** found on the tabs at the bottom of the Work form.

	Related	Total Amounts	Additional Amounts	Time	Materials	Vendors	Readings	Tasks	Other Links	Mitigation	Timestamps	Files	Reminders	
Material	Description	Purchase	Quantity	Unit Price	Charge	Unit Cost	Cost							
ELEC-SWITCH-T-C	Wall Switch - triple cream		2.000	2.0000	\$4.00	3.0000	\$6.00							
BELT-45TLSJ5	45TLSJ5 Belt		3.000	0.0000	\$0.00	48.0000	\$144.00							
TSTAT-550	Thermostat 550		1.000	0.0000	\$0.00	30.0000	\$30.00							

To reference the entire detail table, use (for example), [Work.Detail:WorkMaterials]. This will show all the detail records from the Materials tab on that work record.

To reference a specific column of a detail table, use (for example), [Work.Detail:WorkMaterials.Material]. This will show the value from the Material column for all the materials linked to the work record.

### Following is a list of Work detail tables and their more commonly referenced columns:

#### WorkReadings

- [Work.Detail:WorkReadings.Value]
- [Work.Detail:WorkReadings.Notes]
- [Work.Detail:WorkReadings.Code]
- [Work.Detail:WorkReadings.Reading]
- [Work.Detail:WorkReadings.DateValue]
- [Work.Detail:WorkReadings.CapsuleValue]

#### WorkRelated

- [Work.Detail:WorkRelated.Work]

#### WorkVendor

- [Work.Detail:WorkVendors.Vendor]
- [Work.Detail:WorkVendors.Description]
- [Work.Detail:WorkVendors.Purchase]

#### WorkMaterials

- [Work.Detail:WorkMaterials.Quantity]
- [Work.Detail:WorkMaterials.Description]
- [Work.Detail:WorkMaterials.Material]
- [Work.Detail:WorkMaterials.UnitPrice]
- [Work.Detail:WorkMaterials.Purchase]
- [Work.Detail:WorkMaterials.Inventory]
- [Work.Detail:WorkMaterials.Charge]
- [Work.Detail:WorkMaterials.UnitCost]
- [Work.Detail:WorkMaterials.Cost]

#### Time

- [Work.Detail:Time.StartDate]
- [Work.Detail:Time.EndDate]
- [Work.Detail:Time.Contact]
- [Work.Detail:Time.WorkType]
- [Work.Detail:Time.StartTime]
- [Work.Detail:Time.TimeType]
- [Work.Detail:Time.TotalTime]
- [Work.Detail:Time.TotalCharge]
- [Work.Detail:Time.HourlyCharge]
- [Work.Detail:Time.HourlyCost]
- [Work.Detail:Time.TotalCost]

#### TimestampDetail

- [Work.Detail:TimestampDetail.Populate]
- [Work.Detail:TimestampDetail.Timestamp]
- [Work.Detail:TimestampDetail.Notes]
- [Work.Detail:TimestampDetail.TimeValue]
- [Work.Detail:TimestampDetail.DateValue]

#### Reminders

- [Work.Detail:Reminder.Done]
- [Work.Detail:Reminder.ReminderType]
- [Work.Detail:Reminder.Recipient]
- [Work.Detail:Reminder.ReminderTrigger]
- [Work.Detail:Reminder.Notes]
- [Work.Detail:Reminder.EmailCreated]
- [Work.Detail:Reminder.TimeActive]

#### WorkTasks

- [Work.Detail:WorkTasks.Task]
- [Work.Detail:WorkTasks.Notes]

**WorkAmounts**

[Work.Detail:WorkAmounts.Account]

[Work.Detail:WorkAmounts.Description]

[Work.Detail:WorkAmounts.Charge]

[Work.Detail:WorkAmounts.Cost]

For clients using HTML in emails, you can further format the presentation of these details in tabular format using a format introduced in Suite 70:

[TableName.Table:DetailTableName.ColumnName] where

- TableName = Primary capsule
- DetailTableName = Detail lines
- ColumnName = detail line field; repeated for each

E.g. Within a trigger for the Work table, to extract the *Reading*, *Value*, and *Notes* from the Work Readings detail table, the reference would be:

[Work.Table:WorkReadings.Reading.Value.Notes]