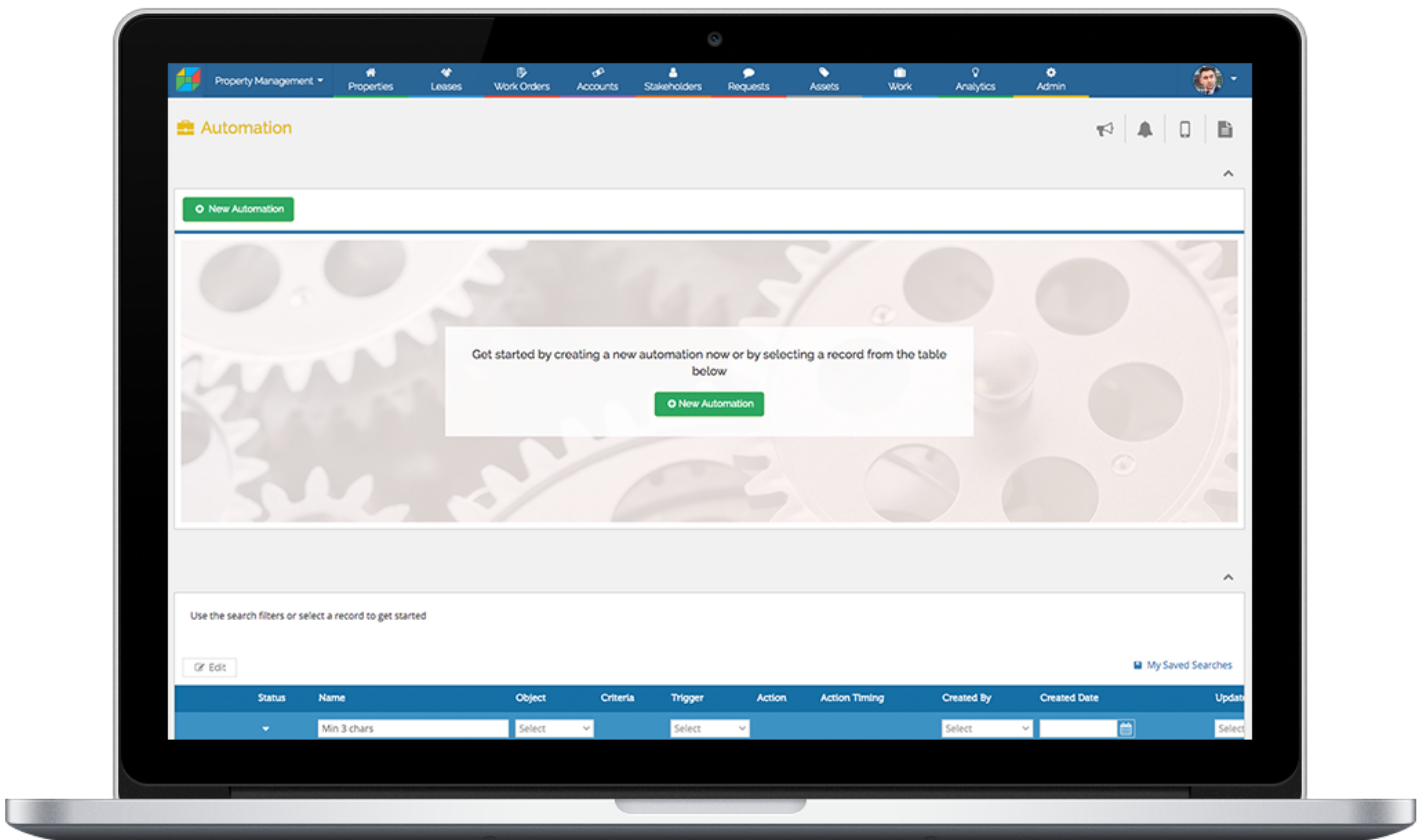
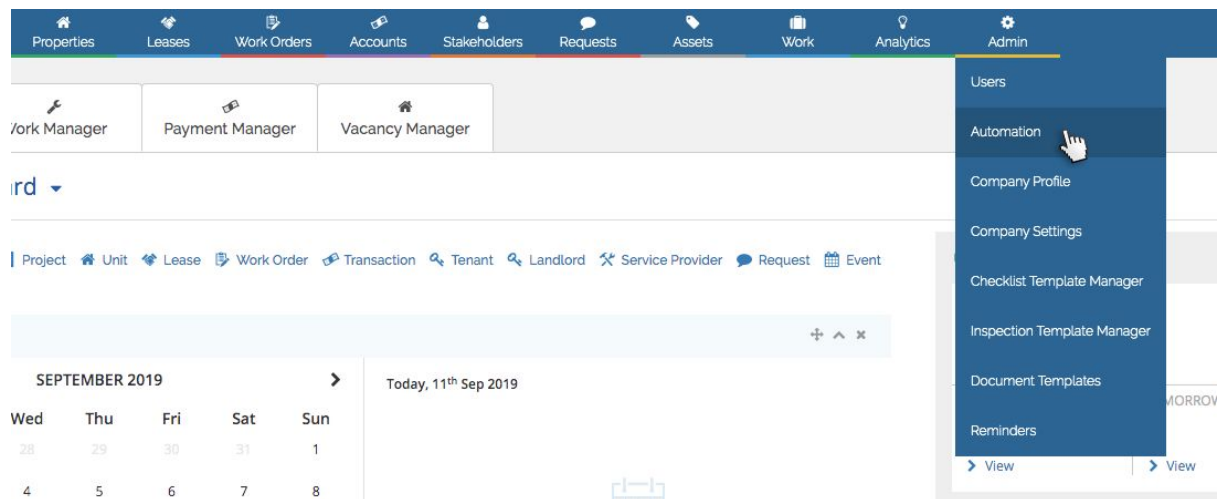




## Automation Instructions for Property Management users



## Overview



Advanced automation allows you to create a targeted set of actions that get executed when triggered by a set of rules or based on a field change. Its power can help streamline many workflow processes at your company and save time by doing repetitive, monotonous tasks for you.

There are hundreds of potential scenarios where automation can help your Property Management business. Here are some common examples:

1. When a tenant requests a work order through the tenants' portal and the priority is marked as urgent > send an email to the facility manager.
2. When a lease sub status is marked as renewed > send an email to the Tenant.
3. When a lease type > commercial or industrial is created > send an email to the commercial team.
4. When cheque status is marked as bounced > send an email and system notification to the accountant / tenant.
5. When a work order gets completed > send an email to the tenant.

## Automation Management

You can manage all your automation workflows conveniently from one place. The following actions can be performed on individual plans:

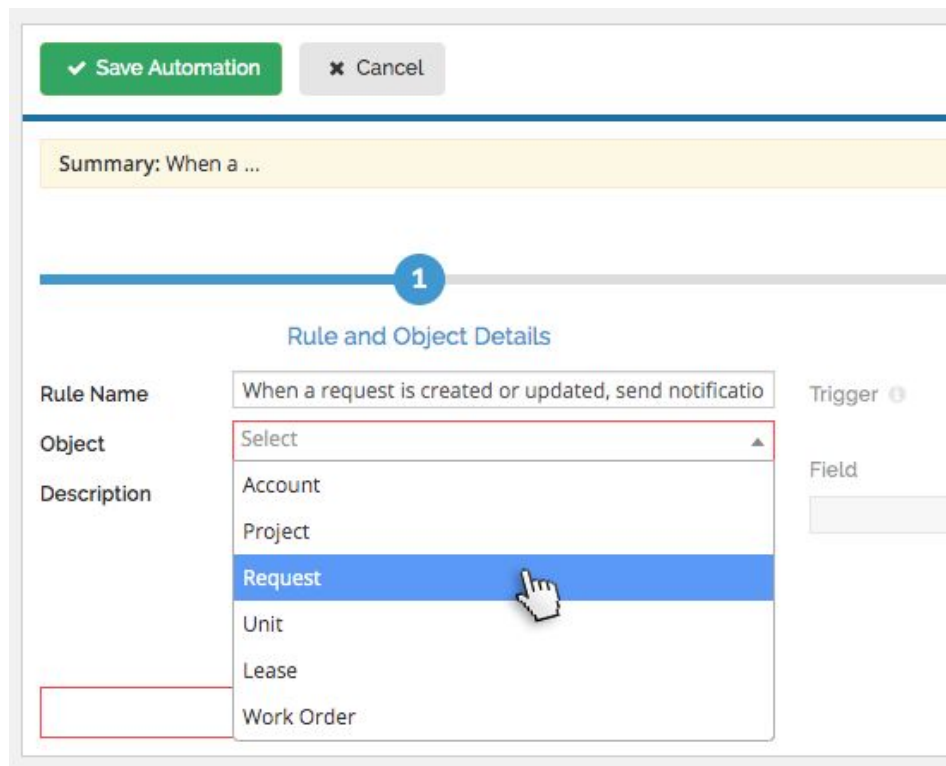
1. Activate / Deactivate
2. Edit

## Creating a New Automation

1. Click on the New Automation button.



2. On the Automation Builder page, enter the desired name for the rule and select the relevant module. Fields and conditions will be updated depending upon the module selected.



✓ Save Automation    ✕ Cancel

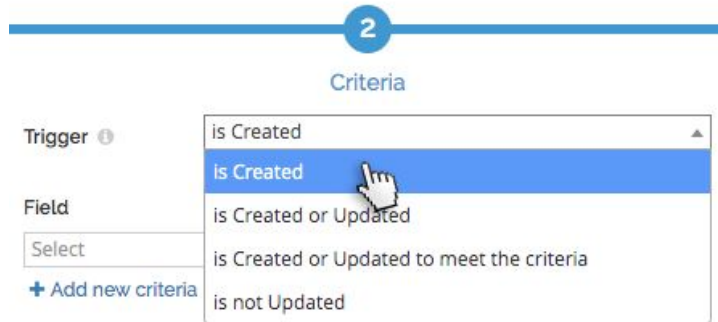
Summary: When a ...

1

### Rule and Object Details

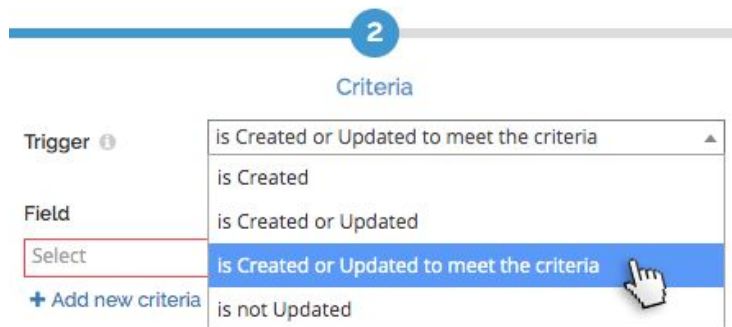
Rule Name	When a request is created or updated, send notificatio	Trigger ⓘ
Object	Select ▲	Field
Description	Account	
	Project	
	<b>Request</b>	
	Unit	
	Lease	
	Work Order	

3. In the next section, you can define the criteria that would trigger the automation plan. The Trigger options available are:
  - a. When record is created



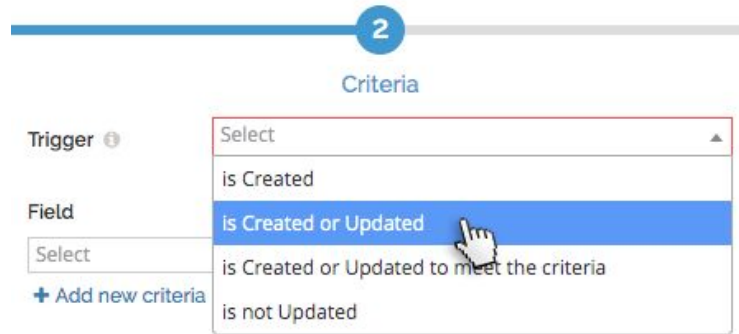
By selecting this trigger condition, an action will only be taken if a new record has been added in that module. You can define field-level conditions for a more targeted trigger event. E.g.: For the Units module, you can set the trigger criteria for the actions when anyone creates a new Unit in PropSpace where the Category field contains Apartments or Villas.

- b. On change of field values



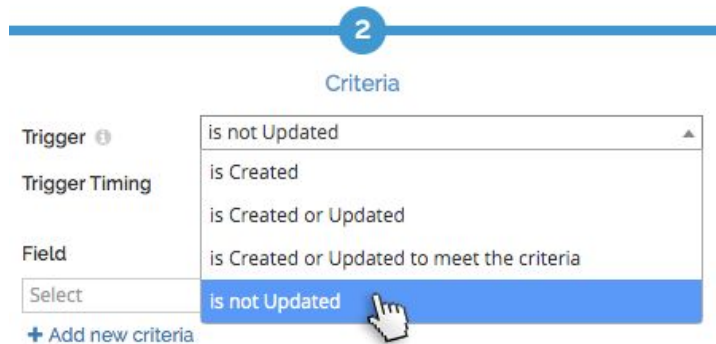
By selecting this trigger condition, an action will only be taken if a predefined field value has been changed. You can define field-level conditions for a more targeted trigger event. E.g.: Actions will be triggered if any unit with the Category field as Apartments, undergoes a Status change to Leased.

c. When record is created or updated



This trigger listens for any record that may be created or updated in PropSpace, and initiates the actions if the criteria are valid. By defining field-level conditions, the trigger conditions can be made more accurate and relevant. E.g.: Actions will be initiated when any lease (new and existing records) has its Status field marked as Closed.

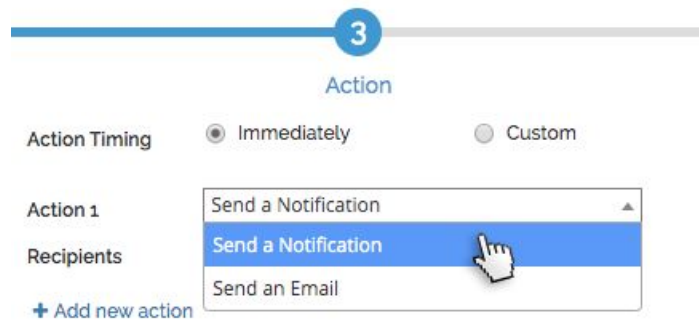
d. When record is not updated



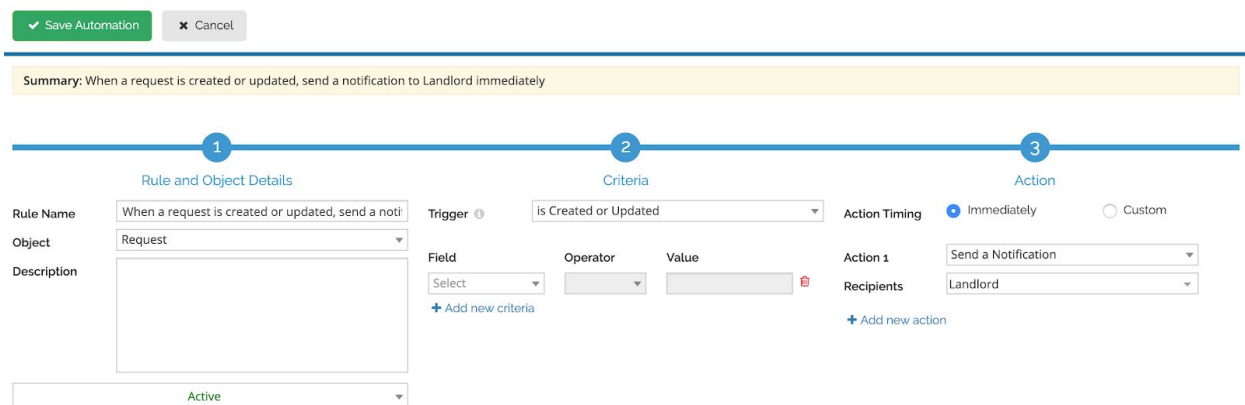
This trigger can be used when a record has not been modified over a predefined period. Using field-level conditions is essential when using this trigger to remain within specific criteria. E.g.: Actions will be initiated when any request with its Status as Open has not been updated for two weeks.

4. Once you have defined your criteria, you can define the actions to do when the plan has been triggered. In the next section, you can define 3 actions that need to run, which can occur immediately or after a delay.

- a. Send an email  
This action will send out an email notifying about the trigger event. Multiple recipients can be defined to receive the notification email.
- b. Update record  
This action will update the record that triggered the automation. Use this action to reallocate the record to another agent or change its status.



5. Save the Automation when you are done and close the builder. If your automation is set to Active, it will “listen out” for existing and future records that fit the criteria and trigger the relevant actions.





Be advised that best practice requires you to finalise your automation plans before you activate them. Certain weak rules can trigger large volume of actions to be taken or potentially update data in PropSpace.

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For any queries about Automation for Property Management, please email:  
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