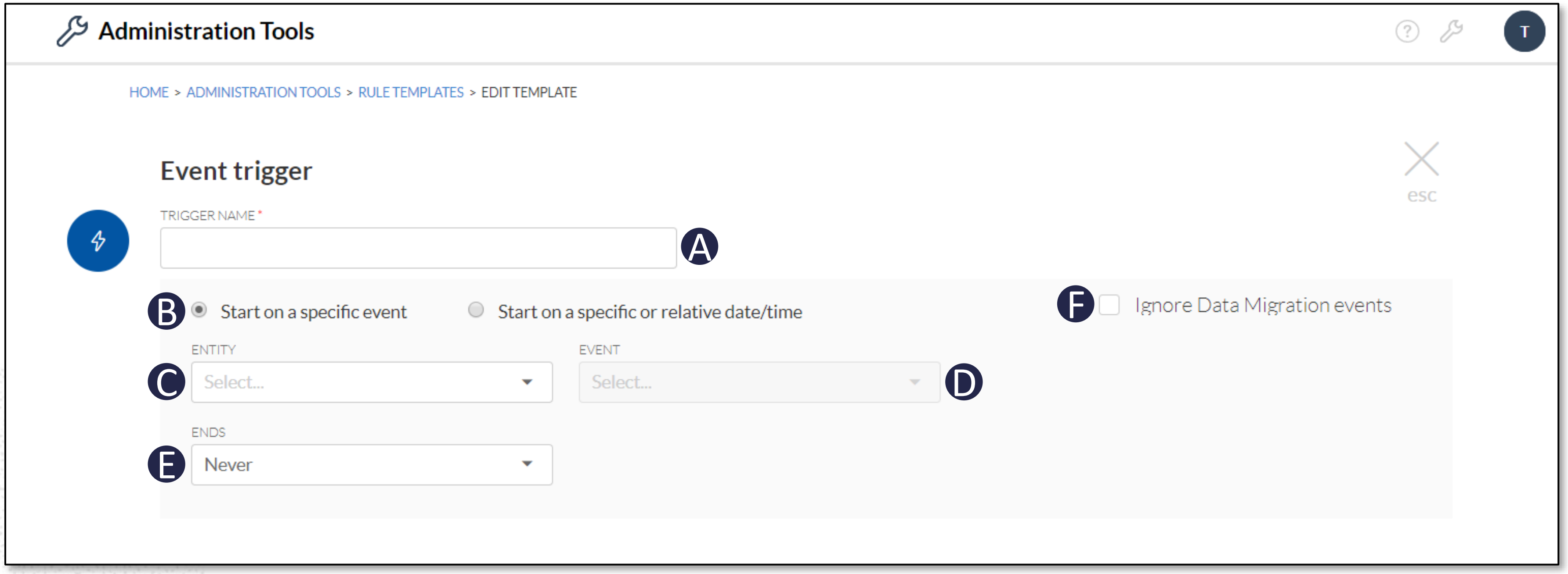
Automating NextOS

Setting up custom outbound communications to stay in contact with your clients during every stage of the customer journey couldn't be easier. Using NextOS Automation, you can trigger rules to occur after a specific event or on a specific date/time. For example, let your customers know their ticket is being worked on, or send surveys or marketing materials. Use an Event Trigger to automatically send welcome emails to new customers. Or, use a Time Trigger to text customers a discount code on their birthday each year.

**As an Admin, choose Business Automation, name your Rule, and set the Triggers.*



Creating Event Triggers

A. Enter a name for the Event Trigger.

B. Select the **Start on a specific event** radio button.

C. Select the CRM component or Activity to start the trigger. For example, choose Account to send an email when a new Account is created.

D. Select the **Event** type, or when the automation is activated (**Created**, **Deleted**, **Updated**, **Merged**). Options will vary based on the CRM component selected.

E. Specify when the Trigger **Ends** (**Never**, **On** a specific date/time, or **After** a specified number of occurrences).

F. Select the **Ignore Data Migration events** checkbox to exclude future data migration events from triggering the automation rule.

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Creating Time Triggers

A. Enter a name for the Time Trigger.

B. Select the **Start on a specific or relative date/time** radio button.

C. Enter the start **Date**, **Time**, and **Time Zone** to initiate the automation rule for the first time. You can also configure how often to **Repeat** the rule and when the rule should stop running.

D. Select the **Data Source** to tell the system what CRM record (i.e. Account, Contact, Case) or component (i.e. Topic, Case Status) to look at when the rule is triggered. For example, send an email 30 days before the contract expires.

E. The data source needs to meet certain criteria in order to narrow down the system queries. For example, the Case Status must be set to Resolved to trigger the rule.

F. Specify how to limit and prioritize the Triggers. For example, you can prioritize by the time the status was updated.