



Order Confirmation Next Step Automations

View the below guide to set up the following:

1. Email Customer a Job Confirmation Email letting them know their Job Number and set them up with expectations.
2. Change Proof Column status to 'Needs Proof'.
3. Automatically notify your graphic designer to create proof for job.



Set Up Automations

1. Email Customer a Job Confirmation Email letting them know their Job Number and set them up with expectations.

Select Entity
Job

Select Automation Type

Status Change ☒
When a status is changed, this logic will trigger an action such as notifying your customer.

Job Purchase Orders ☐
When the status the of Purchase Orders for a job update, this logic will trigger a Job Status Change.

Proofs ☐
When the status the of Proof(s) change, this logic will trigger a Job Status Change.

Accounting Status ☐
When an Invoice is created or the Accounting Status changes, this logic will update the Job Status.

Order Confirmation

If the Select status Overall Status Select status is changed to ORDER CONFIRMED Se...

What we should do? Via Notify Who should be notified? Email The customer

and what should the notification say

Email Subject
Confirmation of Job {{job.number}} from {{company.name}}

2. Change Proof Column status to 'Needs Proof'.

Select Entity
Job

Select Automation Type

Status Change ☒
When a status is changed, this logic will trigger an action such as notifying your customer.

Job Purchase Orders ☐
When the status the of Purchase Orders for a job update, this logic will trigger a Job Status Change.

Proofs ☐
When the status the of Proof(s) change, this logic will trigger a Job Status Change.

Accounting Status ☐
When an Invoice is created or the Accounting Status changes, this logic will update the Job Status.

Job Confirmation Status > Change Proof Status to 'Needs Proof'

If the Select status Overall Status Select status is changed to ORDER CONFIRMED Se...

What we should do? Choose Status Column Update Job Status to Artwork Choose Status NEEDS PROOF

3. Automatically notify your graphic designer to create proof for job.

Select Entity
Job

Select Automation Type

Status Change ☒
When a status is changed, this logic will trigger an action such as notifying your customer.

Job Purchase Orders ☐
When the status the of Purchase Orders for a job update, this logic will trigger a Job Status Change.

Proofs ☐
When the status the of Proof(s) change, this logic will trigger a Job Status Change.

Accounting Status ☐
When an Invoice is created or the Accounting Status changes, this logic will update the Job Status.

Needs Proof - Alert Graphic Designer

If the Select status Artwork Select status is changed to NEEDS PROOF Se...

What we should do? Via Notify Who should be notified? Email Skye Pengelly

and what should the notification say

Email Subject
{{job.number}} Needs Proof Prepared & Uploaded



Order Confirmation Template

Hi {{contact.firstName}},

Thank you for choosing {{company.name}}, we've processed your order. Your job number is {{job.number}}. Please reference this job number if you need to contact us about the order.

What to expect from here:

1. We will now create your proofs and send them for your approval. Expect proofs in 3 days.
2. We will raise an invoice and send it for payment. Please note that we will not begin production until payment has been received in full.
3. We will order all required stock and will advise if there are any potential stock issues.
4. We will produce your order, this process usually takes 5 working days once your proofs have been approved. You'll hear from us when production is complete
5. You'll be notified when your order has been shipped or is ready for collection.

Thanks and we look forward to working with you!

Kind regards,

{{user.firstName}} | {{company.name}} | {{company.phone}}