

Five Automations to Boost Your Productivity



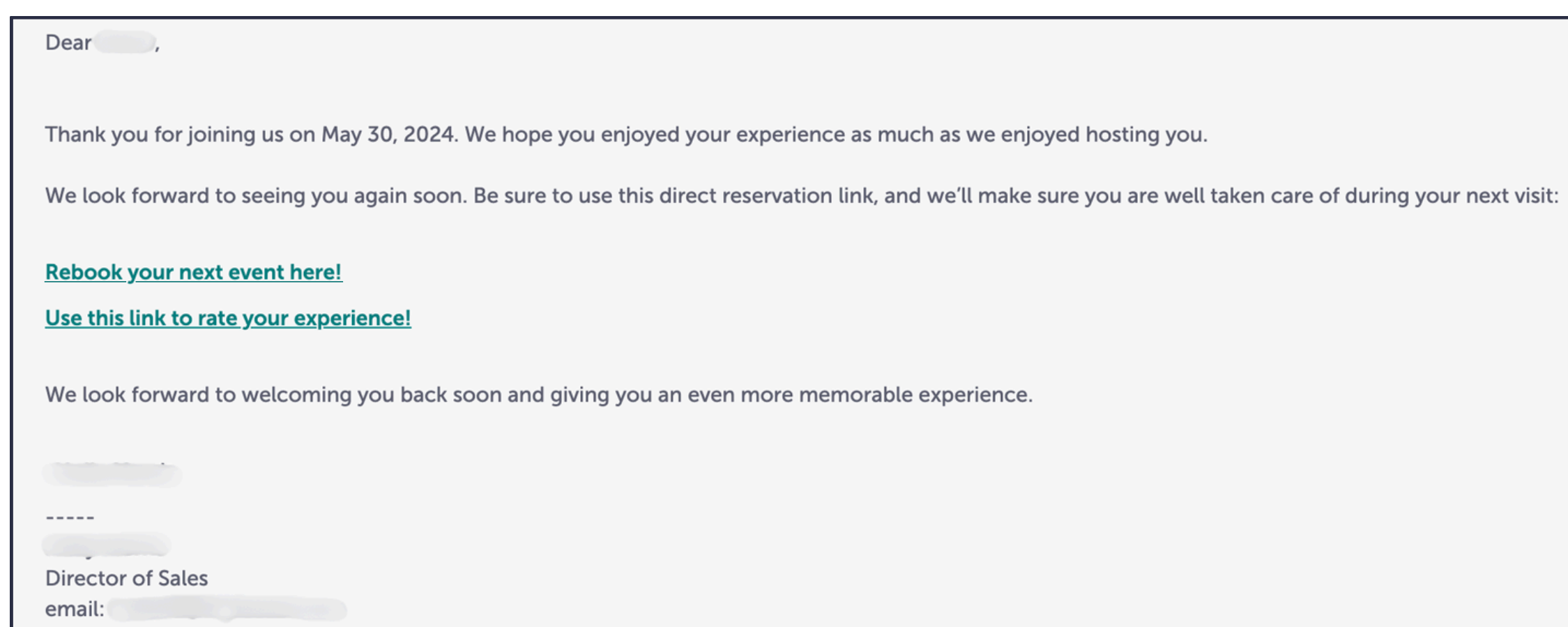
Automations within Tripleseat are designed to promote efficiency throughout your day and provide consistency for your guests, improving the quality of their experiences. Below are five of our own hospitality professionals' favorite automations that will help improve your workflows and streamline guest communication! To access automations in Tripleseat, go to Settings > Automations.

Automated Discussions

Thank You and Rebook an Event

After your event has come and gone, the most important thing an event manager can do is to ensure that they keep this contact in their pipeline to ensure rebooking in the future. Having an automated message to thank the contact for choosing them to host their event and offer a call to action for the contact to have a way to rebook.

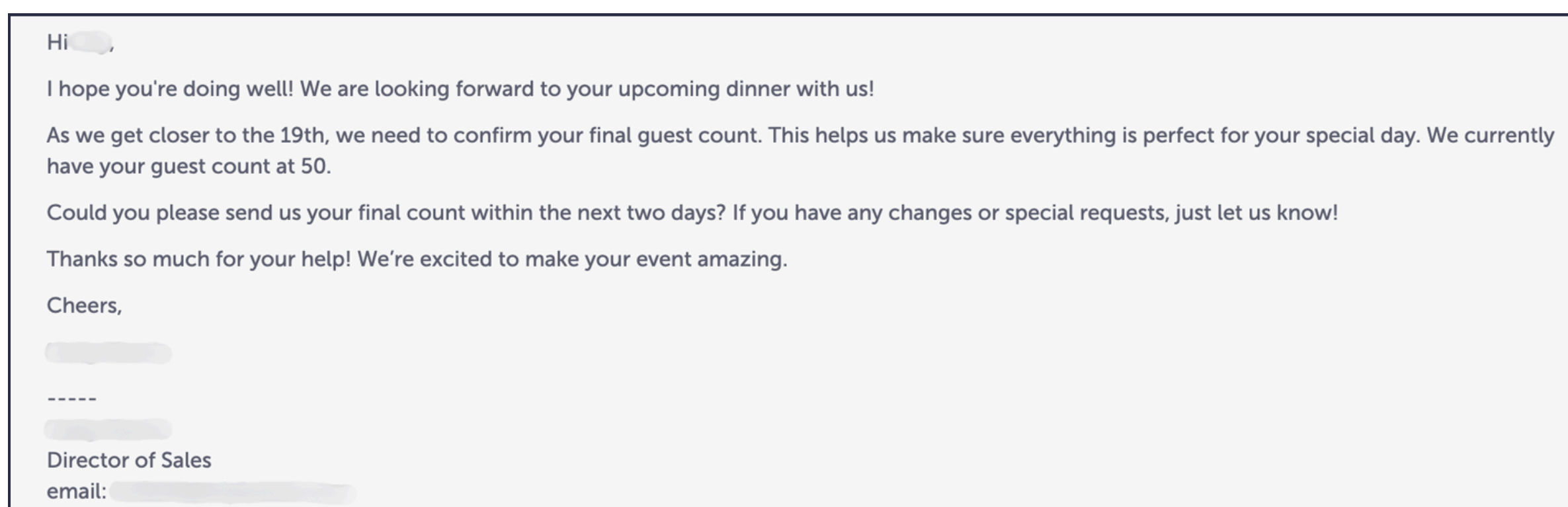
- **Trigger Action:** Event/Booking status changed to Closed
- **Due Date/Send Date:** 1 Day after Trigger Action
- **Suggestions to include in your Email Template:**
 - Subject: Thank you for having your event at {{event.location.name}}!
 - Tripleseat Lead Form link or TripleseatDirect Form link to rebook an event
 - Link to a post-event survey
 - Unique merge fields like Event Date or Contact Name



Guarantee Final Guest Count

Juggling events is never easy, and sometimes, small details can be forgotten to confirm until it's too late! With this automated discussion, you can rest assured that guest counts are always guaranteed for your events, impressing your boss and guests with your attention to detail!

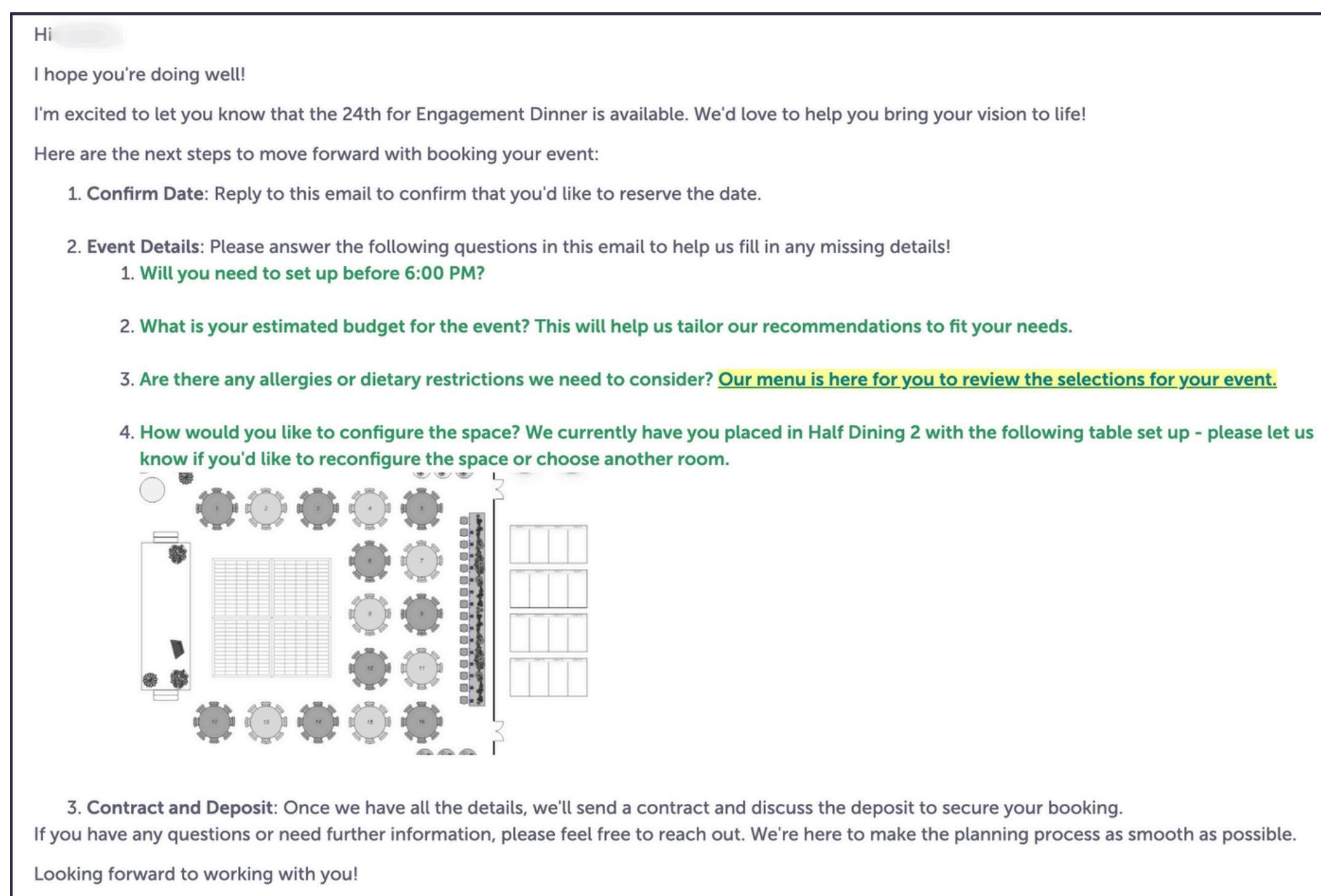
- **Trigger Action:** Event/Booking status changed to Definite
- **Due Date/Send Date:** 5 Days before Event Date
- **Suggestions to include in your Email Template:**
 - Subject: Confirming Final Guest Count for {{event.name_truncated}}
 - Request for the confirmation to be sent back within 1-2 days after the email is sent
 - Unique merge fields like Guest Count, Guaranteed Guest Count, or Event Date



Event Date Available for Lead Inquiry

One of our best practices is for event managers to always convert leads to prospect events so they can be visible on the calendar. To boost productivity and ensure a lightning-fast response, having this automated email will instantly kickstart the planning process for you and the contact to work together and make some event magic happen!

- **Trigger Action:** Event/Booking status changed to Prospect / Lead Converted to Event
- **Due Date/Send Date:** 0 Days after Trigger Action (This will be sent immediately!)
- **Suggestions to include in your Email Template:**
 - **Subject:** Your Event Date is Available!
 - Embedded Content Templates for visuals like available floorplan configurations
 - Additional questions for the contact to answer
 - Checking off "Include this Email in Guest(s) Response" allows the guest to answer the questions directly in the email.
 - Link to menu selections for guest



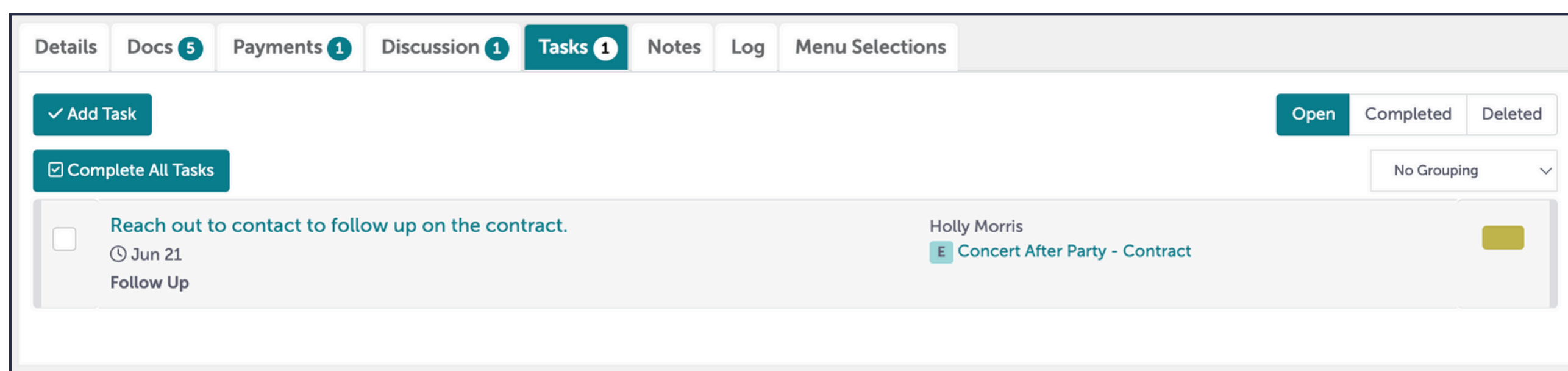
Best Practice: Use this [Crash Course](#) to learn more about how to set up automated discussions and begin streamlining communication faster!

Automated Tasks

Follow Up on Contract/Proposal

Setting up an automated task for contract creation ensures that all agreements are organized and prioritized. This helps you stay on top of commitments, ensuring smooth collaboration to bring all your venue's events to life!

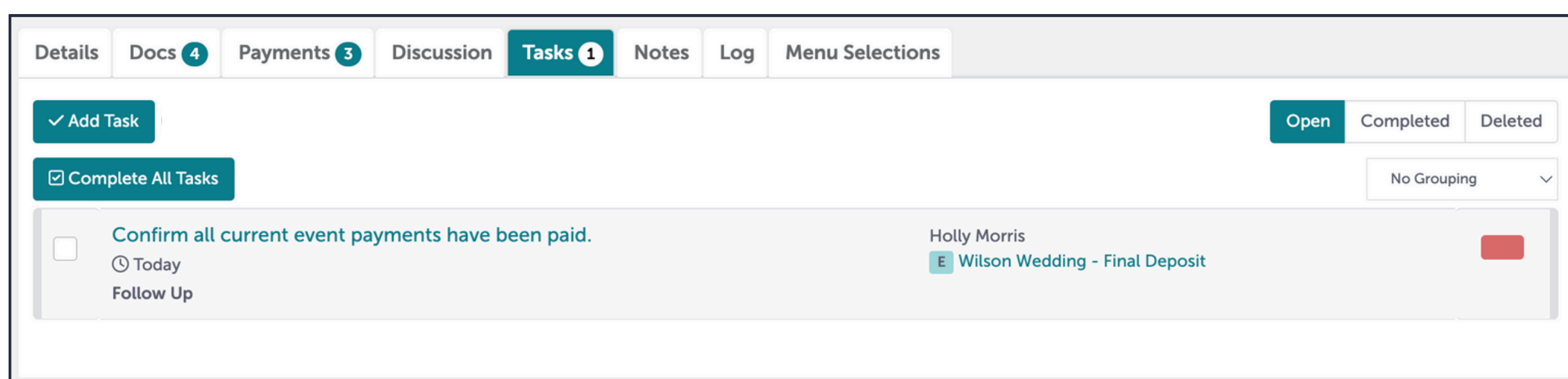
- **Trigger Action:** Document Shared > Choose Specific Document
- **Due Date/Send Date:** 7 Days after Trigger Action
- **Task Type:** Follow Up
- **Task Body:** Reach out to contact to follow up on the contract.
- **Smart Task Assignee:** Owners and managers



Confirm Payment Received

To enhance efficiency, setting up an automated task for payment confirmation ensures timely acknowledgments and organized documentation. This helps you stay on top of finances, ensuring smooth transactions and fostering trust with clients.

- **Trigger Action:** Payment Created
- **Due Date/Send Date:** 2 Days before Payment Due Date
- **Task Type:** Follow-Up
- **Task Body:** Confirm all current event payments have been paid.
- **Smart Task Assignee:** Owners and managers



Best Practice: Automations can be saved as both a task and a discussion, too! This should only be configured when a due date and send date fall on the same day.

We also recommend finding your existing automated tasks that require a discussion to be sent and toggling them to become automated discussions instead. This will improve your workflows and help you get the most out of Tripleseat!