

Streamline Communication with Automated Discussions



Automations within Tripleseat are designed to promote efficiency throughout your day and provide consistency for your guests to improve the quality of their experiences. Get set up with automated discussions to enhance your daily workflow!

1. Access your automations.

To find your automated tasks and discussions, go to Settings > Automations to get started.

- On this page, you will see existing tasks and discussions that can be edited, or you can create new automations.
 - Automations can be filtered by type, and you can choose whether you would like to see deleted automations to recover.

Settings

- General
- Preferences
- Locations
- Advanced
- Automations**
- Sales Performance Goals and Reporting

Automations

Filter By: All Deleted [+ New Automation](#)

Automation Type	Name	Trigger	Due Date	Event Types	Event Styles	
Task, Discussion	Finalize Guest Count	Event status changed to definite	60 days before Event date	Wedding and Rehearsal Dinner	All	
Discussion	Payment Reminder	Event payment created	2 days before Payment due date	All	All	
Discussion	Thank You & Rebook	Event status changed to closed	1 days after Trigger action	All	All	

Automations
Create or modify the automatic creation of tasks and discussions after various actions occur.

Sales Performance Goals and Reporting
Set sales goals for your event sales staff by month and view their progress.

- Click [+ New Automation](#) to begin creating a new automation.

2. Fill in the basics.

Regardless if you are creating a new automated task or discussion, you will need to fill out the following information:

- Create a **name** for your automation.
- Choose which **locations** you would like the automation to apply to.
- Choose a **trigger** that will cause the automation to be created.
 - If the automation has an event trigger, select the applicable event types and styles to which it should be restricted.
- Assign a **due date** to the automation.
 - To make an automation send out the same day as a trigger, put "0" for the due date.
 - Depending on the trigger, you may have additional options to select beyond "Trigger action."

New Automation

Name
Moving Forward with Event
e.g. "Lead Follow-up Reminder"

Locations [Select All Locations](#)

- Lakeview Grill
- Lakeview Portland
- Lakeview Restaurant

Trigger
Lead converted to event
What causes this automation to be created?

Due Date / Send Date
0 Days
After Trigger action

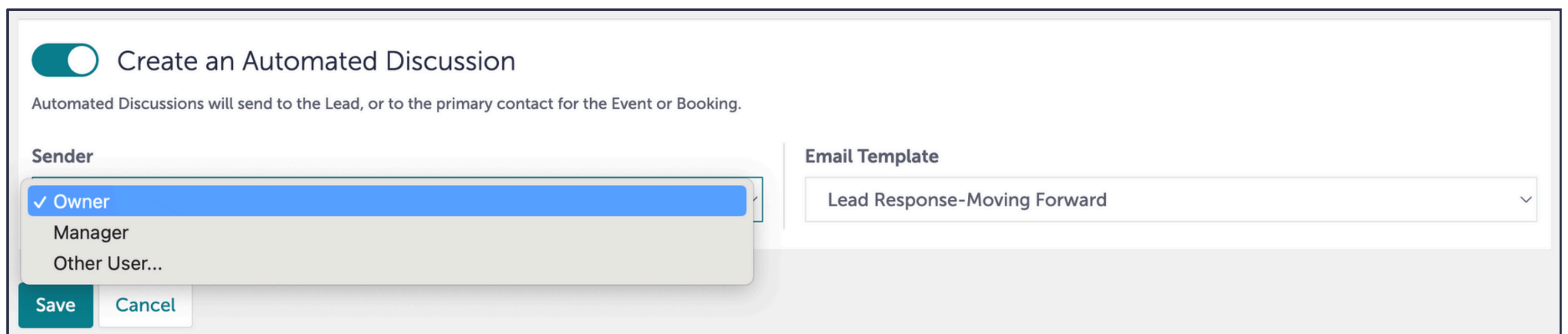
- Once you have filled in the basic information, toggle the "Discussion" option underneath "Automation Type" to finish creating your automated discussion.

Pro-Tip: You can make an automation a task and a discussion by toggling both options!

3. Detail your new automated discussion.

For an automated discussion, you need to select the two following fields to continue creating it:

- Choose the **sender** of the automated discussion.
 - The sender can be the owner of the lead, event, or booking that the automation is assigned to, the manager, or any available user from the dropdown list.
- Select an **email template** to be sent within the automated discussion.
 - Email templates will populate based on the category of your trigger. For example, a trigger for an event status will only allow event-based email templates to be assigned to the automated discussion.
 - When an automated discussion is triggered, it will pull the most recent version of the assigned email template.



Create an Automated Discussion

Automated Discussions will send to the Lead, or to the primary contact for the Event or Booking.

Sender

- ✓ Owner
- Manager
- Other User...

Email Template

Lead Response-Moving Forward

Save Cancel

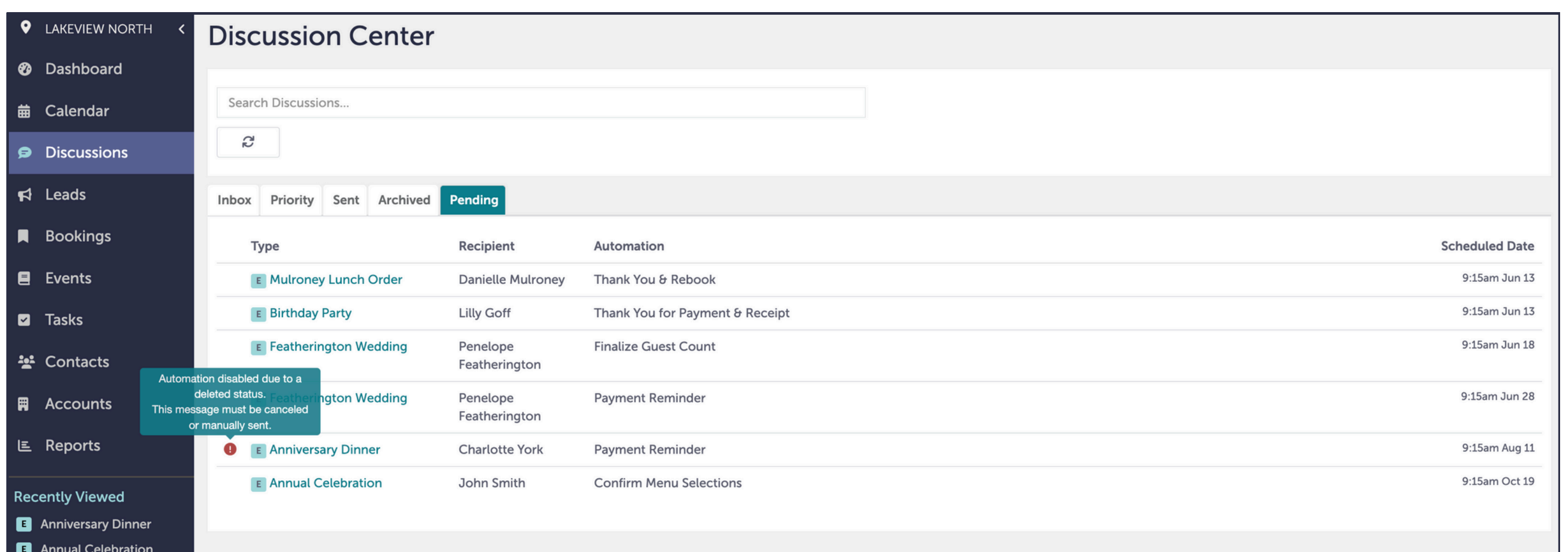
- Click **Save** to finish creating your new automated discussion!

4. Monitor and manage pending discussions.

Discussion Center

Any automated discussions scheduled to be sent and where you are designated as the Sender will be visible under the Pending tab within the Discussion Center.

- Once an automated message has been sent, the message will move to the Sent tab.
- Automated messages that fail to send will remain within the Pending tab with an error message for the automation.



LAKEVIEW NORTH <

Discussion Center

Search Discussions...

Inbox Priority Sent Archived **Pending**

Type	Recipient	Automation	Scheduled Date
Mulrone Lunch Order	Danielle Mulrone	Thank You & Rebook	9:15am Jun 13
Birthday Party	Lilly Goff	Thank You for Payment & Receipt	9:15am Jun 13
Featherington Wedding	Penelope Featherington	Finalize Guest Count	9:15am Jun 18
Featherington Wedding	Penelope Featherington	Payment Reminder	9:15am Jun 28
Anniversary Dinner	Charlotte York	Payment Reminder	9:15am Aug 11
Annual Celebration	John Smith	Confirm Menu Selections	9:15am Oct 19

Automation disabled due to a deleted status. Featherington Wedding. This message must be canceled or manually sent.

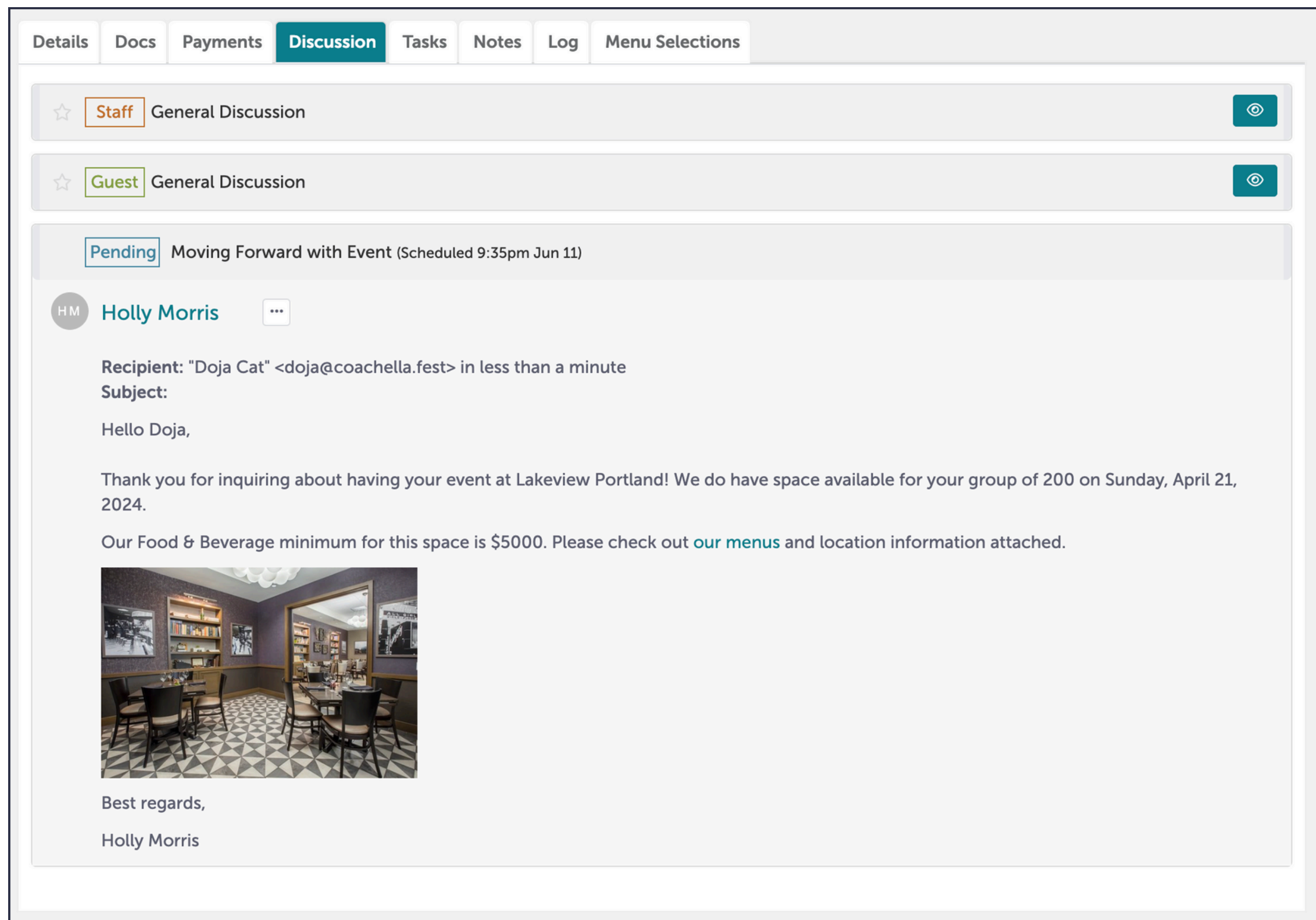
Recently Viewed

- Anniversary Dinner
- Annual Celebration

Lead, Event, and Booking Discussion Tabs

Automated discussions that are scheduled to be sent will be visible underneath the Guest/Staff General Discussion threads in the Discussions tab. They are denoted by a **Pending** badge.

- This thread will contain the name of the automated discussion and the scheduled time that the automation is meant to be sent.



The screenshot shows a user interface with tabs: Details, Docs, Payments, Discussion (selected), Tasks, Notes, Log, and Menu Selections. Below the tabs are three discussion threads:

- Staff General Discussion
- Guest General Discussion
- Pending** Moving Forward with Event (Scheduled 9:35pm Jun 11)

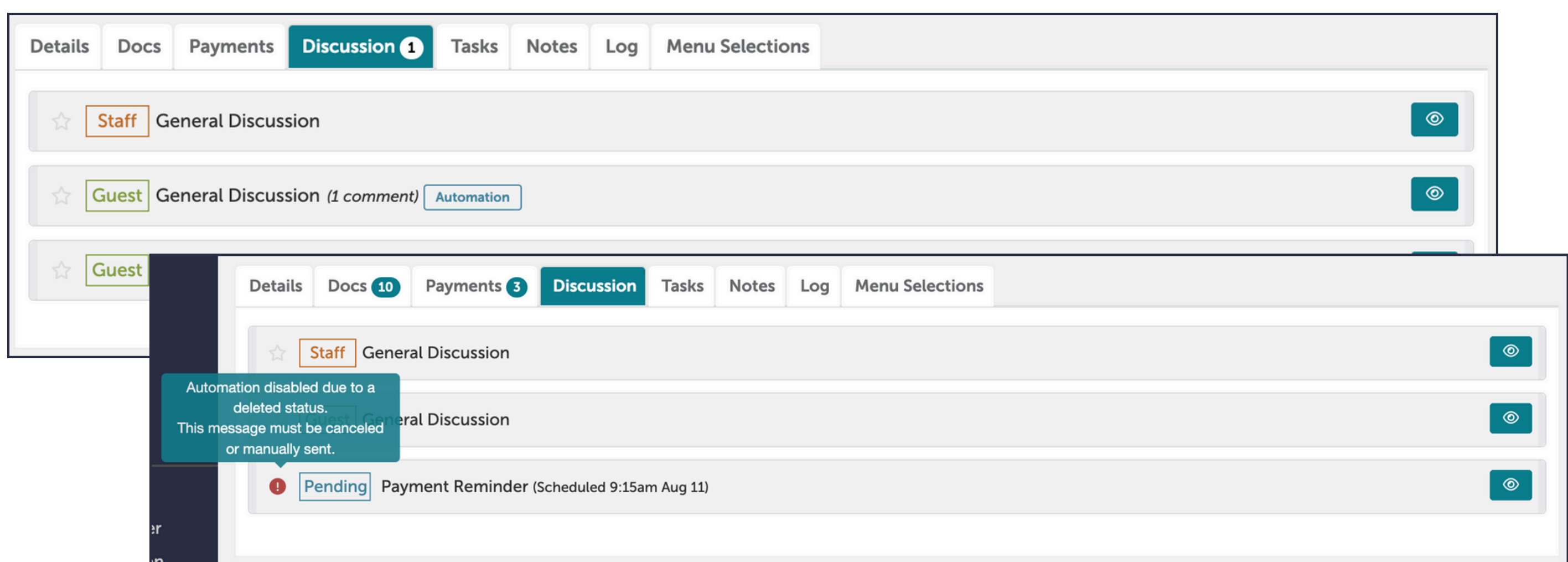
The pending thread is expanded, showing a message from Holly Morris (HM) with a three-dot menu icon. The message content is:

Recipient: "Doja Cat" <doja@coachella.fest> in less than a minute
 Subject:
 Hello Doja,
 Thank you for inquiring about having your event at Lakeview Portland! We do have space available for your group of 200 on Sunday, April 21, 2024.
 Our Food & Beverage minimum for this space is \$5000. Please check out [our menus](#) and location information attached.

Below the text is an image of a restaurant interior with tables and chairs. The message ends with:

Best regards,
 Holly Morris

- Once an automated message is sent, it will become its own General Discussion thread, denoted by an **Automation** badge.
- Automated messages that fail to send will remain pending with an error message for the automation, telling the user to either cancel or manually send the message.



The screenshot shows the same user interface as the previous image. The Discussion tab now has a notification badge with the number '1'. The threads are:

- Staff General Discussion
- Guest General Discussion (1 comment) **Automation**
- Guest General Discussion

The 'Automation' thread is expanded, showing a message from Holly Morris (HM) with a three-dot menu icon. The message content is:

Recipient: "Doja Cat" <doja@coachella.fest> in less than a minute
 Subject:
 Hello Doja,
 Thank you for inquiring about having your event at Lakeview Portland! We do have space available for your group of 200 on Sunday, April 21, 2024.
 Our Food & Beverage minimum for this space is \$5000. Please check out [our menus](#) and location information attached.

Below the text is an image of a restaurant interior. The message ends with:

Best regards,
 Holly Morris

A dark blue error message box is overlaid on the top of the expanded thread, containing the text:

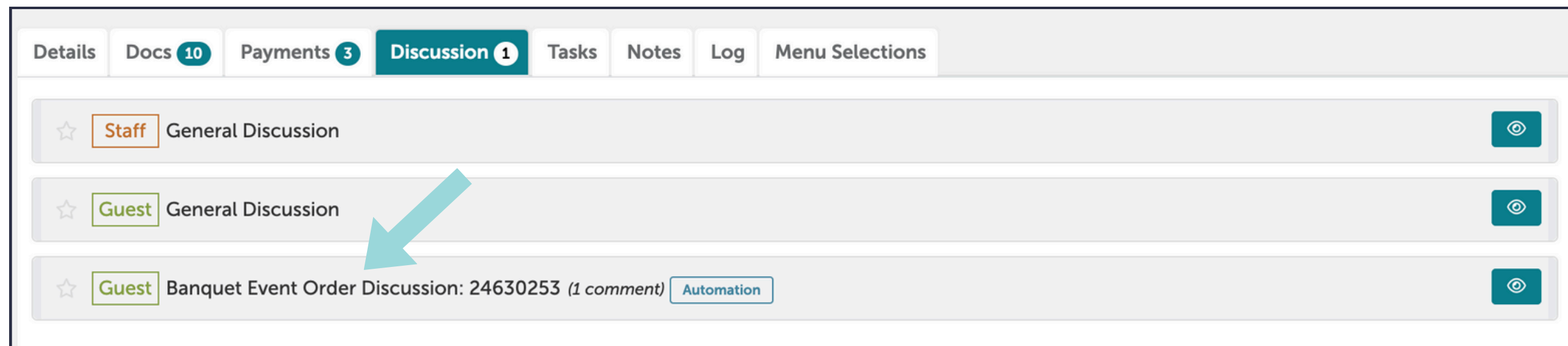
Automation disabled due to a deleted status.
 This message must be canceled or manually sent.

Below the error message, the thread is now labeled **Pending** and shows a red exclamation mark icon. The thread title is: **Pending** Payment Reminder (Scheduled 9:15am Aug 11).

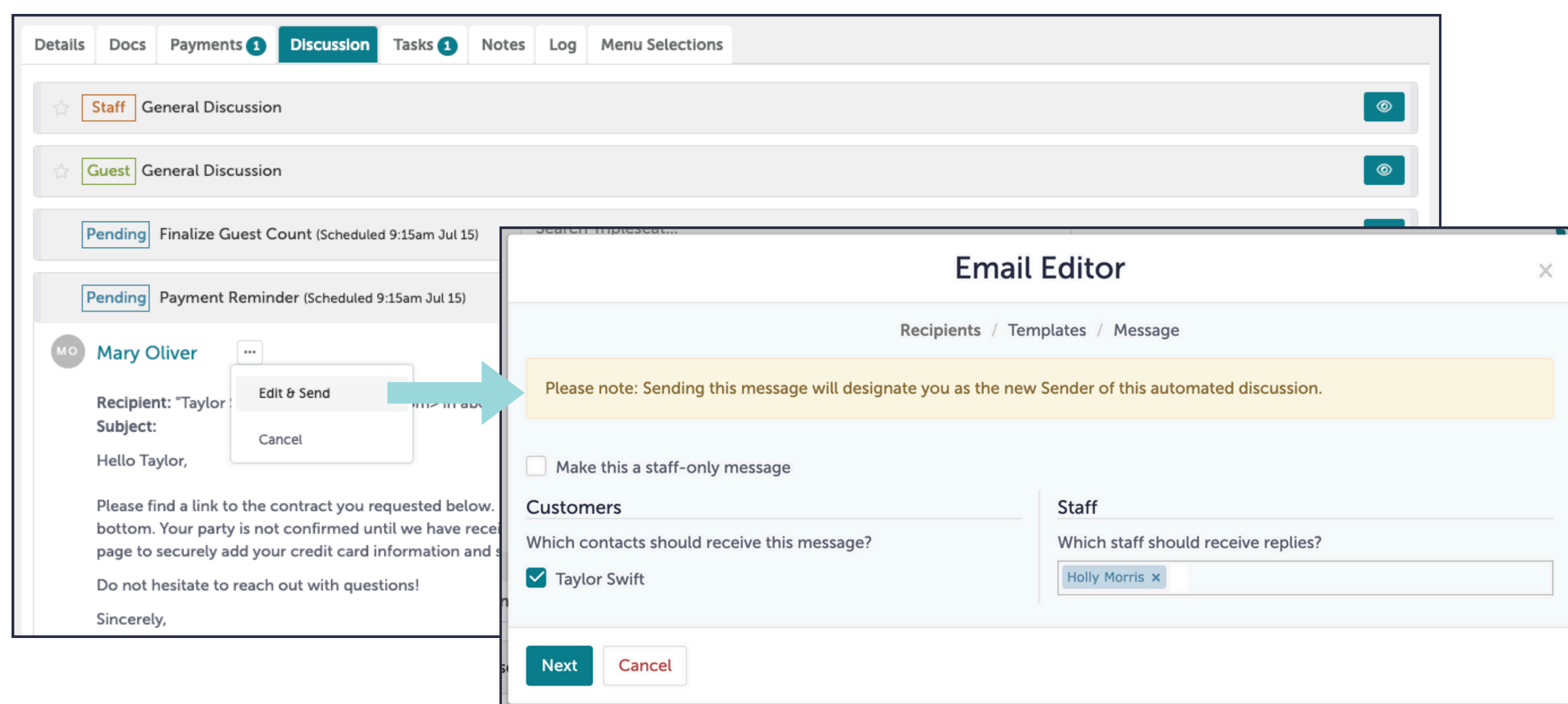
Sending Messages

Regardless if you are working out of your Discussion Center or a specific lead, event, or booking's Discussion tab, it's important to know the following notes apply to all automated discussions:

- Automated discussions are sent at **9:15 a.m. local time**, based on the timezone configured within Settings > Preferences. This is a group-wide setting, meaning this timezone will apply to all locations.
- If an automated discussion is set to trigger by an event relating to a document or payment, a new thread will be created with the document name or payment information as the thread name once it has been sent.




- When an automation is canceled, the message will be permanently deleted.
- Clicking "Edit & Send" will open the Email Editor. If an automated discussion is edited and manually sent, it is immediately sent, and the user editing it will become the new sender of the message.
 - Manually sent automated discussions will not become their own discussion thread; instead, they will become part of the original General Discussion thread.



Best Practice: If you need to edit a message that is scheduled to be sent, edit the Discussion Email Template instead! When an automated message is sent, it pulls the latest version of the assigned template.

- By default, automated discussions will be sent to the lead or to the primary contact for the event or booking.

Troubleshooting Automation Errors

There are a few potential reasons why an automated discussion may encounter an error and cannot be sent. These errors are denoted by this  icon that can be seen on the Automations page, the Discussion Center, or the lead, event, or booking's Discussions tab. When a user hovers over the icon, they will be informed of the reason behind the error and their options for troubleshooting.

Some reasons that may cause an automated message to fail to send are:

- The email template associated with the automated discussion has been deleted, or no longer has access to the location.
- The sender has lost access to the location associated with the automated discussion (this can include the site or location being disabled).
- The payment or document associated with the pending automated discussion has been deleted.
- The lead, event, or booking has been turned down, deleted, or set to a Lost status.

Best Practice: Please contact our Support team if you need any help configuring or troubleshooting your automated discussions!

Admin Reporting

To easily view a list of all automated discussions that are pending across your site, Admin users can go to Reports > Pending Automated Discussions Report.

- The report is sorted by the Scheduled Date column.
- The hyperlink for each row enables the user to easily navigate to the specific event, lead, or booking.

Pending Automated Discussions Report

View a list of automated discussions that are pending across your site.

[All Pending Discussions](#)

Pending Automated Discussions Details (11 rows)								
Location	Sender Name	Recipient Email	Type	Name	Automation Name	Template Name	Scheduled Date	
Lakeview Restaurant	Holly Morris	dmulrone@yaboo.com	Event	Mulrone Lunch Order	Thank You & Rebook	Thank you and Rebook	6/13/2024 9:15 AM	
Lakeview Portland	Mary Oliver	ladypen@whistledown.co	Event	Featherington Wedding	Payment Reminder	Contract and Payment	6/13/2024 9:15 AM	
Lakeview Grill	Holly Morris	lilly@barkbox.bowwow	Event	Birthday Party	Thank You for Payment & Receipt	Thank You!	6/13/2024 9:15 AM	
Lakeview Portland	Holly Morris	ladypen@whistledown.co	Event	Featherington Wedding	Finalize Guest Count	Customer BEO	6/18/2024 9:15 AM	
Lakeview Portland	Mary Oliver	ladypen@whistledown.co	Event	Featherington Wedding	Payment Reminder	Contract and Payment	6/26/2024 9:15 AM	
Lakeview Portland	Holly Morris	ladypen@whistledown.co	Event	Featherington Wedding	Payment Reminder	Contract and Payment	6/28/2024 9:15 AM	
Lakeview Grill	Amelia Deering	tswift@swifties.com	Event	Swift & Kelce Wedding	Finalize Guest Count	Customer BEO	7/15/2024 9:15 AM	

If you want to learn more about different types of automations you can use to increase your productivity and improve workflows, check out this additional [Crash Course!](#)