AUTOMATIONS RECIPE BOOK

by lamplight

On the following few pages we have put together some examples of Automations and how to set these up.

There will be lots more you can do, this is to give you a flavour and give you ideas.

You can follow through on these pages, but for more information about setting up an Automation, please check out the help pages and videos in system help (section 139).

RECIPES

- First test Automation: when I click a link, send me a notification email.
- Add a profile to waiting list B when they are removed from waiting list A.
- When a referral is saved, create a new case.
- Copy the address from a profile to other family members.
- When a publishing module referral comes in, email the recipient and create a task.
- Add a 'set-up' button to a profile: to create a new case; a work record linked to it; make them "my user"; and a reminder in 3 weeks to review it; and show the 'demographics' tab.
- Send an email or text message to people attending work records today.
- Run report template, save results to library, and email me to let me know.
- Update a custom field and then archive a set of profiles in bulk.
- Second test Automation: get your teenager to school on time.

TEST: SEND A NOTIFICATION EMAIL

This is a very simple Automation to get started with. It will create a link in system admin main menu which when you click will send you a notification email.

INGREDIENTS

None needed.

INSTRUCTIONS

1. Go to the ‘Create a new Automation’ page.
2. Enter 'notify me' as the name and 'TESTING - send me an email when I click the link' as the description.
3. Choose the Operator Template that is assigned to your operator

Trigger Event

1. In the 'The trigger event: when this happens..' section, click on 'a menu link is clicked'
2. You can leave the default criteria for this.

Action(s)

1. Scroll down to the ... then do these things - the action(s) section.
2. Scroll down through the list of Actions on the left, to the 'Messages section'.
3. Click 'notify staff by email'.
4. Complete the 'Email subject' and 'Message' sections in the Settings area.
5. Select your name from the 'Who to send to' dropdown.
6. Scroll down and save the Automation.

Check, Activate and Test

1. You'll be take to the list of all Automations. New Automations are always paused initially, so you may need to scroll down to the 'Paused Automations' section.
2. Click the 'Check' button. It will tell you it looks good. Close the popup window.
3. Click the 'Activate' button.

4. Now the moment of truth - go to the main System Admin page. You should see an 'Automations for System Admins' box on the left hand side.
5. Click on the 'notify me' link. You should receive an email with the subject and message you entered in the Automation.
6. Clean up afterwards: pause or delete the Automation.
7. Go to the main 'Set up Automations' page again and click 'Delete' or 'Pause' on your 'notify me' Automation.

MORE INFO...

EXPLANATION

This is not a useful Automation: it's just to get you started and to show you how to set up an Automation.

But you'll see in other recipes how useful the 'a menu link is clicked' trigger can be for speeding up reporting and system admin tasks. They can also be used to add an extra menu in profiles to set up standard processes for your teams.

VARIATIONS

The 'a menu link is clicked' trigger is really useful for testing your Automations, as it doesn't require data to be changed just to trigger the Automation.

They are also very useful for bulk updates - you can use them to archive a load of profiles in one go, for example. But you probably wouldn't want that happening automatically every time.

STREAMLINING WAITING LISTS

This Automation will add a profile to waiting list B when they are removed from waiting list A. This allows you to easily track the status of clients as they move through the stages of your service.

INGREDIENTS

- You've created an Automation before (if not, start with the first recipe).
- The Waiting list module enabled and some familiarity with it.
- Two waiting lists set up in your system. You may want to use test waiting lists if you are concerned about affecting reporting.
- A test profile.

INSTRUCTIONS

1. Add your test profile to waiting list A.
2. Create a new automation and give it a name and description to identify it in the future.
3. Select an operator template that only your operator is allocated to.

Trigger Event

1. **S**elect 'a profile is removed from a waiting list'.
2. Select Waiting list A - that you want to trigger the Automation when a profile is removed from it.

Action(s)

1. Select 'add a profile to a waiting list'.
2. Select Waiting list B - that you want the profile to be added to when they are removed from Waiting list A.
3. Scroll down and save the Automation.

Check, Activate and Test

1. Check and Activate the Automation.
2. Go back to your test profile. Remove them from Waiting list A. You should see that they are automatically added to Waiting list B.
3. Clean up afterwards: pause or delete the Automation.
4. Go to the main 'Set up Automations' page again and click 'Delete' or 'Pause' on this Automation.

MORE INFO...

EXPLANATION

The date the profile joins Waiting list B will be the date they were removed from Waiting list A.

This is a fairly straightforward Automation, but it shows how you can use the trigger and action to link two waiting lists together. You could have as many waiting lists as you need to track different stages of your service, and use Automations to move profiles through them. Waiting list reports can then be used to see who is in each stage of your service, and how long they have been there for.

VARIATIONS

You can only use the 'add to waiting list' action once in an Automation. If you really need to add someone to more than one waiting list at the same time, you could have two separate Automations with the same trigger event (a profile is removed from a waiting list) but different actions (add to waiting list B and add to waiting list C).

If the 'add to waiting list' or 'remove from waiting list' actions are provided with a list of profiles e.g. from running a group view report or from an activity then all of those profiles will be added or removed in bulk.

WHEN A REFERRAL IS SAVED, CREATE A NEW LINKED CASE

Your standard process means that when you receive a new referral, you need to create a new linked case for that person and link the referral to it.

INGREDIENTS

- You've created an Automation before (if not, start with the first recipe).
- Linked case and referrals enabled in your system (most do have this).
- A 'Create Linked case template' that sets the linked case name and any other fields needed.
- A test profile to experiment with.

INSTRUCTIONS

1. Create a new Automation and give it a name and description to identify it in the future.
2. Select an operator template that only your operator is allocated to.

Trigger Event

1. Select 'an operator creates/edits an activity'.
2. Click referral in the criteria section under Activity type.
3. Click 'Operator creates a new record' in the When to trigger the event section.
4. Leave the workarea and locations sections blank.

Action(s)

1. First Action - select 'take some profiles from the activities found' (in the 'Activity actions' section).
2. Leave the Attendance section blank.
3. Select 'Service user referred' in the Attendance role section.
4. Second Action - select 'Create a new linked case' (in the 'Activity actions' section).

5. Tick the box 'Link activity records from the Trigger event or previous Actions to this linked case?'.
6. Select the linked case template you have created for this purpose in the 'Settings' section.
7. Save the Automation.

Check, Activate and Test

1. Check and Activate the Automation.
2. Test it by creating a new referral and checking that a linked case is created with the correct information, with the referral record added to it.
3. Clean up afterwards: delete or pause your test records and the Automation.
4. Go to the main 'Set up Automations' page again and click 'Delete' or 'Pause' on this Automation.

MORE INFO...

EXPLANATION

Typically, when you create a referral record, there are at least two profiles listed: the person that was referred, and the organisation that made the referral. This automation will take the person that was referred and use that to create a linked case - that's most likely the profile that you want to create the linked case for. That's why you need the 'take some profiles from the activities found' action first, to specify which profile you want to use for the linked case.

This will respond to operators creating referral records in the system, not via the publishing module. If you want to respond to referrals coming in to the system from outside (e.g. on your website) then use the 'publishing module referral' trigger instead.

VARIATIONS

You may want to limit which referral records this applies to. There are a couple of ways to do this, and you can use either or both:

- limit the Automatic Action to only be for certain groups of operators (e.g. only those in the 'referral admin' team, identified by their operator template)
- add a workarea criteria to the trigger, so it only creates a linked case for particular workareas and not others.

If you are creating referral records in profiles, you may want to take the operator to the linked case tab directly, so they can edit it straight away. To do this, add a third action 'open a profile at the selected tab' (in the 'Profile' action section) and select the linked case tab in the settings.

COPY THE ADDRESS FROM A PROFILE TO OTHER FAMILY MEMBERS

You work with families and have a profile for the overall family, and also for family members (adults and children). You need the address to be the same on all profiles, but you don't want to have to update it in multiple places when it changes. This Automation will copy the address from one profile to other profiles that are linked to it with a particular relationship type (e.g. 'lives with').

INGREDIENTS

- You've created an Automation before (if not, start with the first recipe).
- A test family profile, and some test family profiles linked to it using a particular relationship type (e.g. 'lives with').

INSTRUCTIONS

1. Create a New Automation and give it a name and description to identify it in the future.
2. Select an operator template that only your operator is allocated to.

Trigger Event

1. **S**elect 'an operator edits the address of a profile'.
2. Select the correct profile type (e.g. family) in the Criteria section.

Action(s)

1. **S**elect 'copy address to related profiles'.
2. Select the relevant relationship used (e.g. 'lives with').
3. Scroll down and save the Automation.

Check, Activate and Test

1. Check and Activate the Automation.
2. Go back to your test family profile. Edit their address.
3. Now go to the relationships tab and check the addresses of the related profiles.
4. Clean up afterwards: pause or delete the Automation.
5. Go to the main 'Set up Automations' page again and click 'Delete' or 'Pause' on this Automation.

MORE INFO...

EXPLANATION

Most of the 'edit profile' events include filters for the profile role/type, and it's likely you'll want to use them a lot of the time. (The role/types in use in your system are set in Global settings).

Lamplight does include a 'circularity check' to prevent Automations endlessly triggering each other. So, in this example, when you edit the address of the family profile, it will trigger the Automation to copy the address to the related profiles. When it copies the address to the related profiles, this will not trigger the Automation again, so it won't keep copying back and forth between them.
This means you could select several profile role/types here, so that if the child address is edited, it will update the family profile too. Whether you want this will depend on how you use Lamplight.

When checking if an address should be copied, both the relationship type and category will be checked.

VARIATIONS

Ordinarily, relationship types are things like 'parent / child', not 'lives with'. In actual use, we'd recommend using 'relationship categories' for this, rather than relationships, because where someone lives, and the nature of their relationship, are not necessarily the same thing. However, for the purposes of this recipe, we have used a relationship type to keep it simple.

Relationship categories allow you to add a second drop-down to relationships between profiles, and we'd recommend using these for 'lives with' if you're not already using them. That way, you can separate out the two types of information. You add options to relationship categories in system admin, and they'll then appear when creating relationships, and in the Automation settings.

WHEN A REFERRAL COMES IN ON YOUR WEBSITE, EMAIL THE RECIPIENT AND CREATE A TASK

You use the publishing module to accept referrals (that create profiles) from your website. You'd like to email people when they come in to your system to send a welcome message and let them know what's next. You also need to add a task for someone to follow up with them in a week's time.

INGREDIENTS

- You've created an Automation before (if not, start with the first recipe).
- The publishing module enabled with a widget set up to receive profiles from your website.
- The comms module enabled, with email set up to send.
- An email template set up to send the welcome message - this should be a 'Create comms' template.

If you want to test this, we'd recommend creating a test publishing module widget, so that your existing widgets carry on as normal until you're happy with it all. Then you can come back and edit the Automation to use the real widget instead of the test one.

INSTRUCTIONS

1. Create a new Automation and complete the first 3 sections.

Trigger Event

1. Select 'data is received through a publishing widget'.
2. Select the correct widget from those listed.

Action(s)

1. Select 'send a comm to profiles'.
2. Select the 'welcome' comms template you want to use.

3. Second Action - 'create a new task'. This has quite a lot of settings - go through and set the first few.
4. When you get to 'Link task to profiles', select 'Link to the first set of profiles...'.
5. In '(also) link task to', select your name.
6. In 'Task display date', type in '7 days' (this means the task will be due in 7 days time).
7. Save the Automation.

Check, Activate and Test

1. Check and Activate the Automation.
2. Time to test it all: go to your website, enter in the details of a new referral with an email address you control, and submit it.
3. Check your email to see if you get the welcome task, and check the profile in Lamplight to see if the task has been created and linked to the profiles.
4. Clean up afterwards: pause or delete the Automation.
5. Go to the main 'Set up Automations' page again and click 'Delete' or 'Pause' on this Automation.

MORE INFO...

EXPLANATION

This Automation uses two Actions - sending an email, and creating a task. In general you can add as many Actions as you like, and many of them can be added more than once. However, we recommend keeping things simple, and having one or two Actions per Automation, so that it's easier to understand and edit in the future. Each Action also takes time to run, so the more you add, the longer it will take to run each time the Trigger event happens.

The publishing module asks for consent to send emails: these are respected by Lamplight and the Automation won't override this, so that you comply with GDPR/PECR type regulations. And of course if they don't provide an email address, it won't be sent either.

Create comms templates can use mail-merge tags, which means you can personalise the emails sent out.

The publishing module has some built-in 'create task' functionality. Using Automations gives you more control over these, but the others will continue to be created as normal. We may add an option to stop these in the future because Automations are more powerful and flexible.

VARIATIONS

There are various publishing module events. We've used the 'data is received through a publishing widget' one here, but you could also use 'a profile is created from outside the system via the publishing module'. If you have a custom integration that doesn't use widgets, you'll need to use that option. Using widgets allows you to customise the tasks for different widgets, if required.

You don't have to send emails - the comms template could be set to send an sms, or even generate a document that'd be saved in their profile within Lamplight.

You could also use this approach to respond when bookings come in. In this case, you would need to use the 'send a comm to profiles' Action, which will only send to the profile that booked. Using the 'send an email to activity participants' Action would send to everyone linked to the activity record, whenever they booked.

ADDING A SETUP BUTTON IN A PROFILE

When you start working with a new user, you need to create some initial records in their profile. In particular, you want to:

- create a new linked case
- add a work record linked to it
- make them "my user"
- and a reminder in 3 weeks to review it
- and show the 'demographics' tab to the operator

There's no automatic trigger you can use to start this - a member of your team reviews their profile and decided whether you're able to work with them. When they do, they'll click a button in the profile to initiate the set-up process.

INGREDIENTS

- You've created an Automation before (if not, start with the first recipe).
- You use linked cases, work records, and messages.
- A linked case template (you set these up in system admin - for linked case and work records).
- A create work record template.
- A test profile to try it in.

You may not have a tab labelled 'demographics' in your system: you can use any tab that shows in a user profile.

INSTRUCTIONS

1. Create a new Automation and complete the first 3 sections

Trigger Event

1. Select 'when a menu link is clicked'.
2. Leave Minimum permission needed that can use as 'Reception'.
3. Change 'Where the link/button is used' to 'Profile page'.

Action(s)

1. First action - select 'Create a new linked case' and select the template you wish to use.
2. Second action - select 'Create a new activity record' and select the work record template to use.
3. Third action - create a relationship: select 'Create a relationship between profiles'. For this example you can leave the default settings as they are.
4. Forth action - select 'Create a new task'.
5. Set the subject and text; link it to the records if you like; and set the 'Task display date' to be '+3 weeks'.
6. The final action - you want to direct the operator to a particular tab in the profile: select 'Open a profile at the selected tab' and select the tab you want to show.
7. Save the Automation.

Check, Activate and Test

1. Check and Activate the Automation.
2. Go to your test profile. In the top-right, next to the 'print' button you'll see a new 'My actions' button with a dropdown menu. Click on the dropdown and you should see the name of your Automation as an option. Click on it to run the Automation.
3. Lamplight will create all the necessary records, and then take you to the tab you selected.
4. View the linked case tab and you should see the records there; and also check the 'relationships' tab.
5. Clean up afterwards: pause or delete the Automation, and delete the records created in the test profile.

MORE INFO...

EXPLANATION

This Automation is a good example of a 'process' Automation that does a series of actions, and then guides the operator to the next thing they should do - in this case, check the 'demographics' tab. The other things that happen - creating the various records - do so silently before leading the operator to the right place. These actions will always need to be last in the list of actions, and you'll usually want one of these process actions to be included in Automations triggered by the profile menu button. Otherwise, Lamplight will take you to a screen showing you what's happened in the automation - which might be useful for testing, but operators will likely want to stay within the profile they're working in.

This Automation also shows well how you can carry out a series of actions in one go, and how different types of data flow between them. The linked case ID is passed on to the work record, and the two will be linked. The profile ID that you are working in is passed to all the actions, so that the linked case is in the profile, and the profile is added to the work record, and also the relationship and message.

You'll need to make sure that you have alignment between operator templates and these actions. The tab that's selected to be shown in the final action will need to be included in the operator templates of the people using this Automation. And if you want them to see the linked case and work records, they'll need to have those tabs in their template too.

VARIATIONS

The other main 'process' action is 'Open a new activity form' - which will lead an operator to complete the right kind of activity record for the stage in the process you're at.

If you want to create a linked case and work record, but not link them, switch the order. The 'create a new linked case' action lets you choose whether to create links between records.

By linking Automations to Operator Templates, you can design different process Automations for different teams or functions. They won't see Automations in profiles that aren't relevant to their work.

SEND AN EMAIL OR TEXT TO PEOPLE ATTENDING A WORK RECORD TODAY

You'd send an automated email reminder to people attending sessions each day.

INGREDIENTS

- You've created an Automation before (if not, start with the first recipe).
- The comms module enabled, with email set up to send.
- An email template set up to send the reminder message - this should be a 'Create comms' template, and can include work merge fields (so you can remind them of the time of the event).
- A 'view work' template that shows records for the current day.
- A test profile attending a test work record. The test profile should have an email address you can access, and permissions set to allow email.

INSTRUCTIONS

We're going to jump straight into setting up a scheduled Automation in the recipe. But to make it easier to test, while developing Automations we'd suggest using 'When a menu link is clicked' trigger, set to a 'System admin control'. This means that as a system admin you'll be able to click a link in the system admin menu to trigger it. Once you're happy with it, you can switch the trigger to the scheduled one for the days and times you want it to run.

Also for testing, we recommend setting up the 'view work' template so that it will only list one record, by using a combination of filters - this will depend on your system and settings. But as an example, you could create a manual group containing just your test profile, and then filter using that group so you should only get the test activity they are attending.

1. Create a new Automation and complete the first sections.

Trigger Event

1. Select 'on a particular day and time'. Select the days and time you want it to run. Don't select more than one time for this type of Automation, or you'll end up sending attendees multiple emails each day.

Action(s)

1. First action - select 'Run an activity view template' and choose the template that will just list records for today. This will get us a list of activity records.
2. Second action - select 'Send an email to activity participants'. Choose your email template.
3. Third action - select 'Create a new activity record' and select the work record template to use.
4. Save the Automation.

Check, Activate and Test

1. Check and Activate the Automation.
2. If you used a 'when a menu link is clicked' trigger for testing, test it by going to the main System Admin menu and you'll see an Automations box. Click the Automation you just created. If you are using the scheduler, you'll need to wait until the day/time you set.
3. You should see the email in your inbox. These are logged in the comms module, so you can see what's been sent as normal in the 'view comms' section.
4. Clean up afterwards: pause or delete the Automation.
5. Once you've tested it and are happy with it, you can switch to scheduled trigger if you haven't already, and update the 'view work' template to include the records you want to send reminders for.

MORE INFO...

EXPLANATION

While building your Automations, we strongly suggest setting them up gradually, with limited records, so that you can see what's happening before going fully live. You can also use the audit module to see what's happening in your system when an Automation is triggered. Starting an Automation is logged in the audit module, and subsequent actions will also be logged as normal, so you can see the originating trigger event and the resulting actions all together. This is really helpful for testing and troubleshooting.

This Automation will send emails to everyone listed on the work records so staff may receive these too. The advantage is that email templates can include mail merge fields from the work records - e.g. time and location. The 'take some profiles from the activities found' will give you a list of profiles, but as a single list - it doesn't retain the links to the relevant activity records and so mail merge data won't be available.

Because 'view activity' templates can't filter by times, you can't narrow them down any further than one day. So if you run this Automation more than once per day, it will send emails to everyone attending sessions that day each time it runs. This also means that you'll want to schedule it to run before sessions start each day (e.g. if your earliest session is 8am, you'd want to schedule this to run at say 7am each day).

VARIATIONS

You could use a template that sends SMS messages too - you'd just need to update the template, or switch it in the Automation.

Sending weekly reminder emails would also be possible - your view activity template would use date filters to get the next week's records, and the Automation would be scheduled to run weekly. If someone is attending more than one session in a week, they will get multiple emails - one for each session.

RUN A REPORT TEMPLATE, SAVE RESULTS TO LIBRARY, AND EMAIL ME TO LET ME KNOW

You run a weekly report and would like Lamplight to do it for you.

INGREDIENTS

- You've created an Automation before (if not, start with the first recipe).
- The library module enabled in your system.
- A report template set up and ready to run.

INSTRUCTIONS

We're going to jump straight into setting up a scheduled Automation in the recipe. But to make it easier to test, while developing Automations we'd suggest using 'When a menu link is clicked' trigger, set to a 'System admin control'. This means that as a system admin you'll be able to click a link in the system admin menu to trigger it. Once you're happy with it, you can switch the trigger to the scheduled one for the days and times you want it to run.

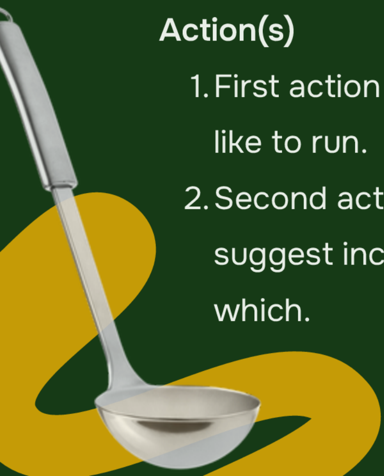
1. Create a new Automation and complete the first sections.

Trigger Event

1. Select 'on a particular day and time'. Select the days and time you want it to run. Don't select more than one time for this type of Automation, or you'll end up sending attendees multiple emails each day.

Action(s)

1. First action - select 'Run a report template' and choose the template that you'd like to run.
2. Second action - select 'create a new file in the library'. Give it a name - we'd suggest including the {datetime} placeholder so you can tell which report is which.



3. Third action - select 'Notify staff by email' action, and complete the details. The Message content should include the {links} placeholder to add a link to the library item.
4. Save the Automation.

Check, Activate and Test

1. Check and Activate the Automation.
2. If you used a 'when a menu link is clicked' trigger for testing, test it by going to the main System Admin menu and you'll see an Automations box. Click the Automation you just created. If you are using the scheduler, you'll need to wait until the day/time you set.
3. You should see the email in your inbox, with a link to Lamplight. This link will take you to the item in the library that was created.
4. Clean up afterwards: pause or delete the Automation, and delete any library items you don't need.
5. Once you've tested it and are happy with it, you can switch to scheduled trigger if you haven't already.

MORE INFO...

EXPLANATION

The report will be run and saved as it is at the time it's run. So the data in the library item will be a snapshot - if you make changes to your data or the report template, the data in the library won't change.

For security reasons, Lamplight won't email you the report directly. It's possible that report templates can generate data that should not be emailed. So instead, we save it to the library and link directly to it, to keep the actual data out of email.

The library items that are created are flagged as potentially containing personal data, and will only be visible to system admins. However if you do make use of this, you'll quickly build up a lot of library items, so we'd suggest reviewing the library categories you use, and doing some housekeeping of the library every now and again.

Notification emails are sent from Lamplight directly and can only be sent to database operators. They aren't logged as comm records, and don't need email set up in the comms module to be sent. They'll come from 'noreply@lamplight.online' - the same as password reset emails and so on.

VARIATIONS

You can also do this with group data view templates. Both report templates and group data view templates generate 'csv table data' and 'Lamplight data table'.

You can run several reports and combine them into a single Excel file - each report will be added as a separate worksheet. To do this, add the Actions to run the relevant reports, and then finally add 'Combine data tables to one Excel and save to library'. A big advantage of doing this is that it can be run overnight, when no-one is using the system, so it won't slow things down, and the results will all be there for you in one file. Don't overdo this though - running a lot of big report templates may take too long to run in one go.

UPDATE A CUSTOM FIELD AND THEN ARCHIVE A SET OF PROFILES IN BULK

You can use Automations to carry out bulk updates on your data. This obviously isn't one you'd want to run automatically, but system admin tasks can be streamlined with ad-hoc automations like this.

In this scenario we'll update a 'Data administration' custom field to show that we're carrying out a regular data review, and then archive them.

INGREDIENTS

- You've created an Automation before (if not, start with the first recipe).
- A group of profiles to be updated. For testing, use a manual group with a couple of test profiles in it.
- A group view template set up, using the group above. A data view isn't needed - we just use it to get the profiles.
- The ID and name of the custom field to be updated.

INSTRUCTIONS

1. Create a new Automation and complete the first sections.

Trigger Event

1. Select 'When a menu link is clicked', and set it to 'System admin control'.

Action(s)

1. First we need to get the profiles to update. Select 'run a group data view template' and select the template set up for this bulk updating.
2. Second, select 'Set a custom field value'. Select the field (they are shown as ID - field name). For this example we are setting a text field, so we can just type "Data review April 2026" as the value.
3. Third, select 'archive profiles'.

Check, Activate and Test

1. Save the Automation.
2. Check and Activate the Automation.
3. In the main System Admin menu and you'll see an "Automations for System Admins" box.
4. Click the Automation you just created.
5. You'll see a notification of what the Automation has just done.
6. Find your test profile (go to People and select 'archived' profiles). Check that the custom field has been updated.
7. Clean up afterwards: pause or delete the Automation. You may want to delete the test group and template too.

MORE INFO...

EXPLANATION

This Automation shows the purpose of the 'System admin control' automation trigger. They are useful for testing some Automations generally, but also for streamlining occasional system admin tasks.

Setting custom field values may need a bit of checking in system admin:

- Date fields should be entered in YYYY-MM-DD format (e.g. 2026-02-21), or variable dates (e.g. -2 weeks) which will be calculated when the Automation runs.
- Option values (i.e. drop-down or checkbox fields) should be entered as the option ID which you can get from system admin. For multi-select fields, enter the option IDs with commas separating them (e.g. 12,56).
- Text and number fields can just be entered as normal.

Updates will overwrite any existing data. To clear a field, leave the value blank and existing data will be overwritten. IDs of fields and Options can be found in **system admin - manage custom tabs and fields in profiles.**

VARIATIONS

In regular use, we'd suggest that you'd do this slightly differently:

- use an auto group to identify the profiles to be archived, likely with some dates in the criteria to identify profiles that haven't been active for a while, or that were created a long time ago, or that have a particular value in a custom field that indicates they are ready for archiving. This way you won't need to keep creating manual groups and templates for this.
- most of the time, keep the Automation paused. It won't show in the main system admin menu, and won't be accidentally triggered. When you want to run it, just check and activate it, and then pause it again when it's done.

BONUS TEST AUTOMATION: GET YOUR TEENAGER TO SCHOOL ON TIME!

While we were testing the new Automations, we'd set a scheduled Automation to notify by email every hour. So every hour I got an email with 'the time is now...'.

My teenage daughter has recently been finding that although she gets up in good time for school, somehow she's always running out of the house a little bit late - the time in the morning just goes. Joking, I suggested I could send her emails in the morning to help her get ready on time. She replied "ngl, that might even work".

I'm not planning to automate parenting and will continue to nag and cajole every morning. This is a slightly silly bonus recipe to learn about setting up scheduled Automations.

(You shouldn't actually do this on a real system because we'll need to set them up as an operator to use notifications.)

INGREDIENTS

- You've created an Automation before (if not, start with the first recipe).
- One teenager who is not very good at getting ready for school on time and will appreciate reminder emails (this may be hard to find).
- (Add them as an operator with their email address. Lock the login.)

INSTRUCTIONS

1. Create a new Automation and complete the first sections.

Trigger Event

- Select 'on a particular day and time'. Choose the days and times - take their latest leaving time, and then start notifications 3 hours before (e.g. Mon - Fri 6am, 7am, 8am).
- Decide if you want to allow weekend lie-ins. If not, also select Saturday and Sunday.

Action(s)

1. Now add an action, select 'Notify staff by email'. Complete the subject and message. You can use the ‘time’ placeholder in either of these. Include essential to-dos for their morning routine. Choose them as the 'who to send to'.
2. Save the Automation.

Check, Activate and Test

1. Check and activate the Automation
2. Relax, knowing that this fail-safe system will guarantee prompt attendance with no further intervention needed from you.
3. Clean up afterwards: pause or delete the Automation.
4. Delete the login.

MORE INFO...

EXPLANATION

The 'Notify staff by email' action is for internal communication - it sends from lamplight.online to operators, but not general profiles. These emails aren't logged in the comms module - they are similar to email resets or safeguarding module notifications.

Section 139.4 in the Help pages has the full list of placeholders that you can use in Actions that support placeholders. You'll see that there's some brief help in the system itself on these actions.

VARIATIONS

You could set up different Automations for each time, so the 06:00 one can say "wake up", the 07:00 one can say "breakfast time", and the 08:00 one can say "leave now".

Unfortunately you can't notify by sms directly from Lamplight. You'd need to use a third-party email-to-sms service for this, or use comms templates. That's probably not an acceptable use of your organisation sms credits though.

lamplight

NOW GET COOKING!