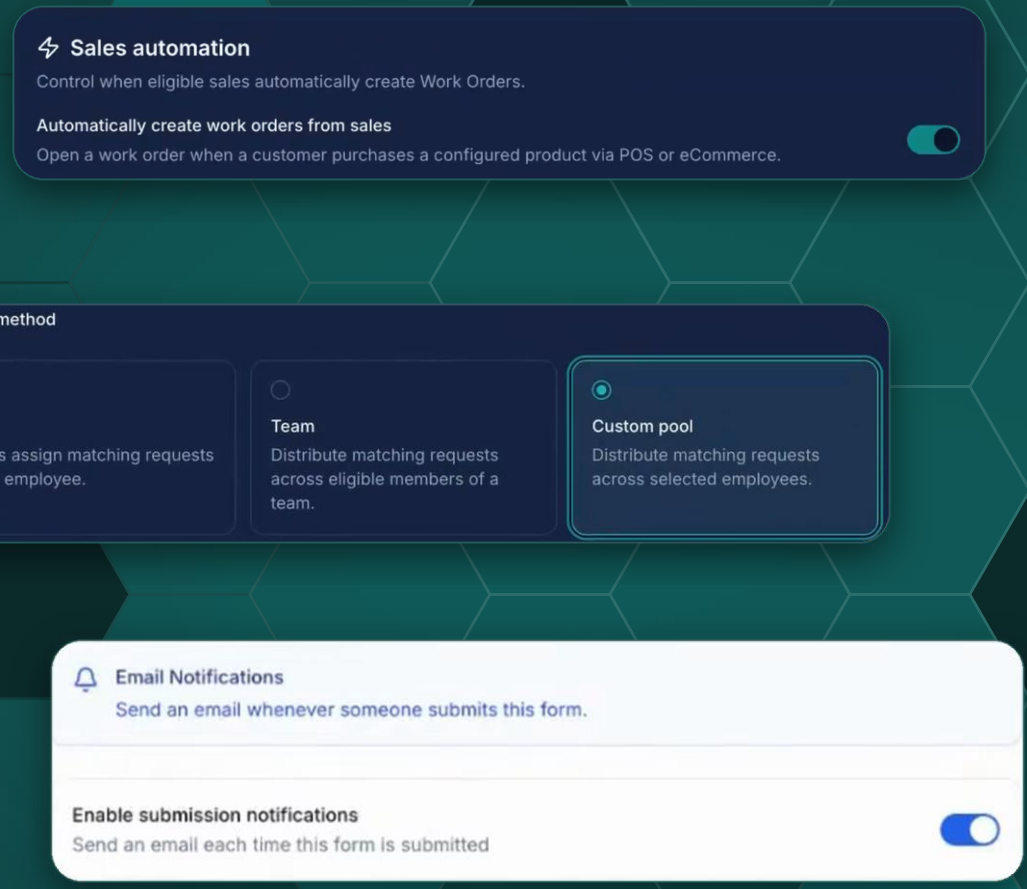
Coreware | COREWEEKLY

10

Coreware Automations

That Do The Work For You

Follow-ups, work orders, request routing and reminders.



AUTOMATION 1 OF 10

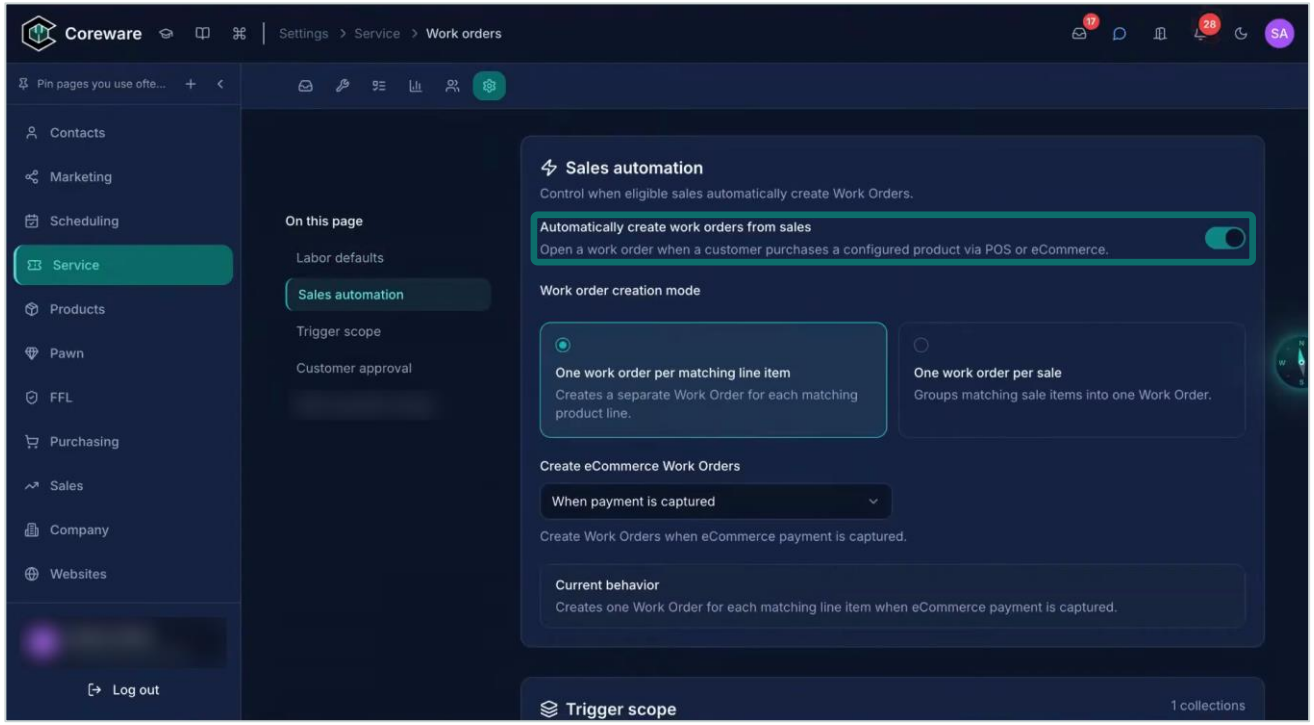
Open a work order automatically when a product sells

WHERE TO FIND IT

Settings › Service › Work orders › Sales automation

HOW IT WORKS

When a product you've selected sells online or in store, Coreware can automatically create a work order if you turn on one setting. You choose which products, categories, tags or collections apply, and the system takes it from there.



Watch: coreBLAST Ep. 20 at 1:27:20 · Demo data from the webinar · timestamp: 1:27:30

Try it: Turn it on for your lowers, so every lower you sell opens a work order for the parts.

AUTOMATION 2 OF 10

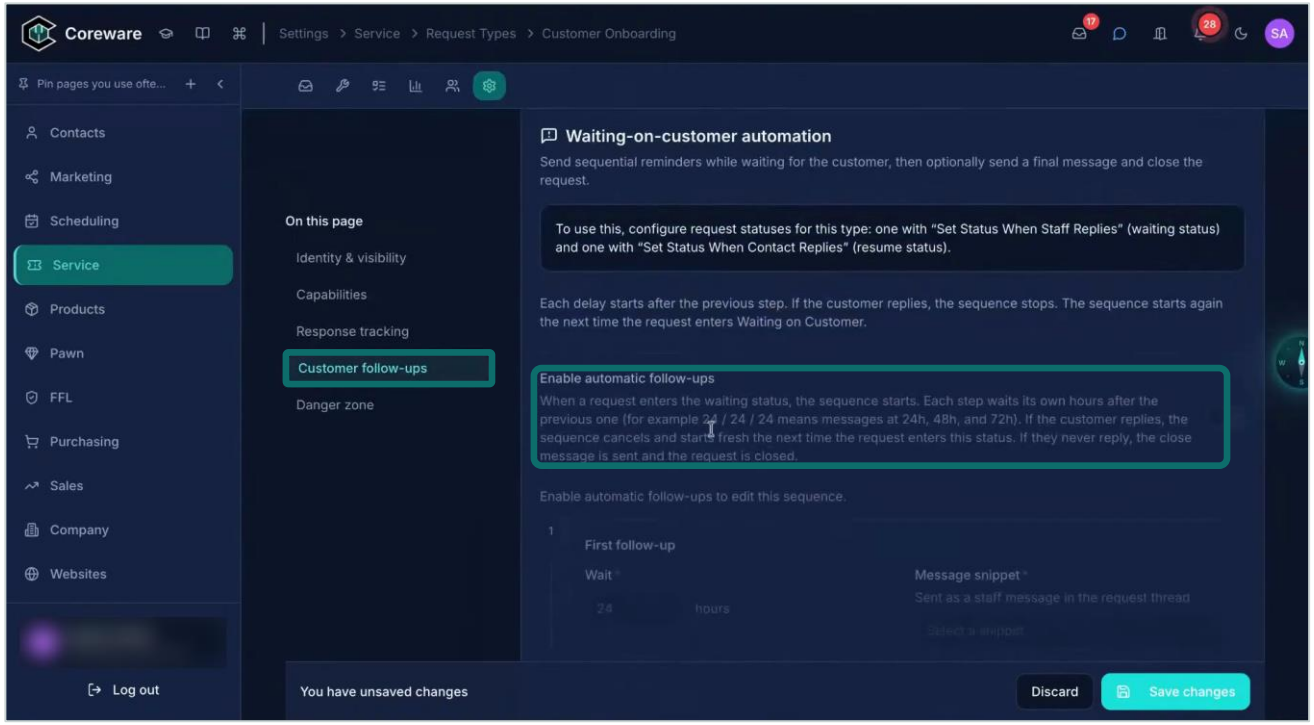
Follow up with unresponsive customers

WHERE TO FIND IT

Service request type settings › Customer follow-ups

HOW IT WORKS

When a request is categorized as "Waiting on Customer," Coreware can send a follow-up email after a set amount of time. For example, a reminder at 24 hours, another at 48, and a last one at 72, depending on how you configure it.



Watch: coreBLAST Ep. 20 at 1:11:12 · Demo data from the webinar · timestamp: 1:11:06

Try it: Add a 24-hour follow-up to your most common request type.

AUTOMATION 3 OF 10

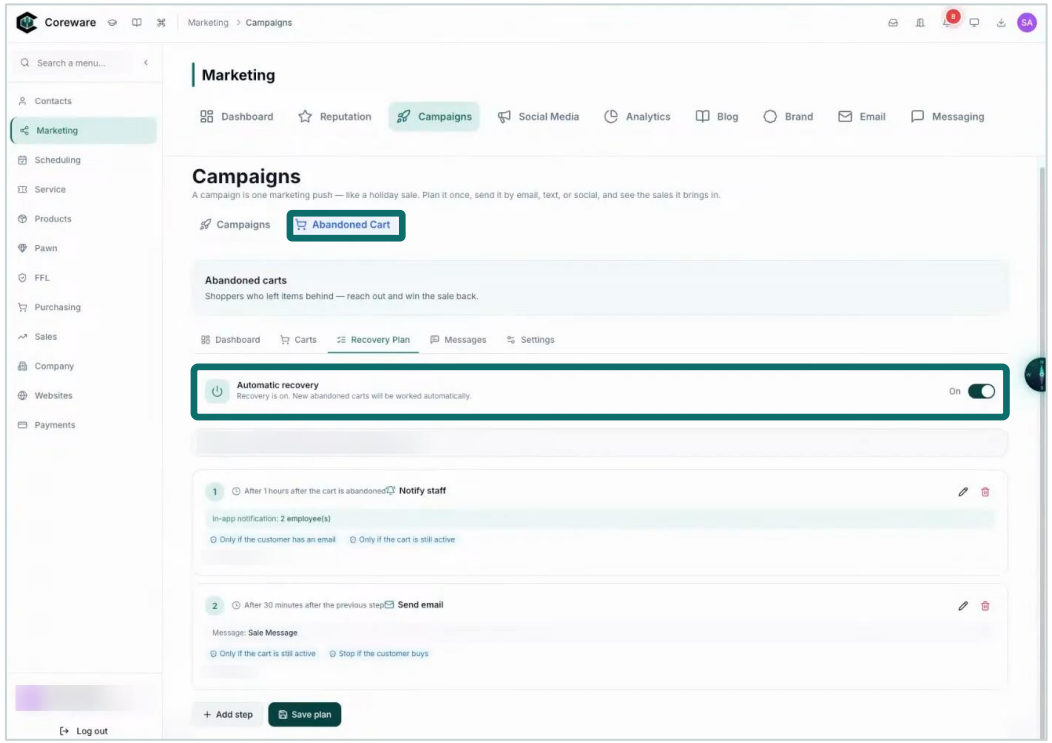
Bring shoppers back to abandoned carts

WHERE TO FIND IT

Marketing › Campaigns › Abandoned cart

HOW IT WORKS

Turn on the recovery plan, set when a cart counts as abandoned and the minimum cart value, then add timed steps that send an email, notify staff or add to an action plan. The seeded email goes to known customers, lists their items and links back to the same cart.



Watch: coreBLAST Ep. 19 at 1:31:22 · Demo data from the webinar · timestamp: 1:32:58

Try it: Build three steps: an hour after, the next day and the day after.

AUTOMATION 4 OF 10

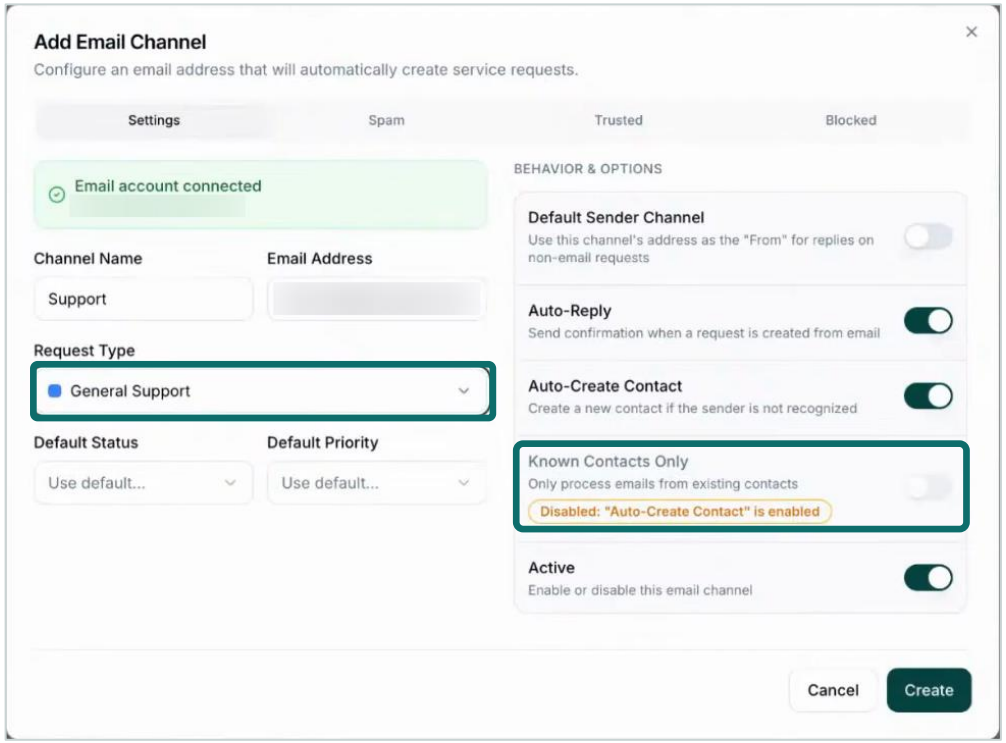
Turn support emails into requests

WHERE TO FIND IT

Service › Settings › General settings › Email channels

HOW IT WORKS

Connect your support mailbox and choose the request type it creates. The options are auto reply, auto create contact, and known contacts only, which skips senders who aren't already in your contacts.



Watch: coreBLAST Ep. 13 at 32:53 · Demo data from the webinar · timestamp: 34:07

Try it: Connect your support address, turn off auto create contact and turn on known contacts only.

AUTOMATION 5 OF 10

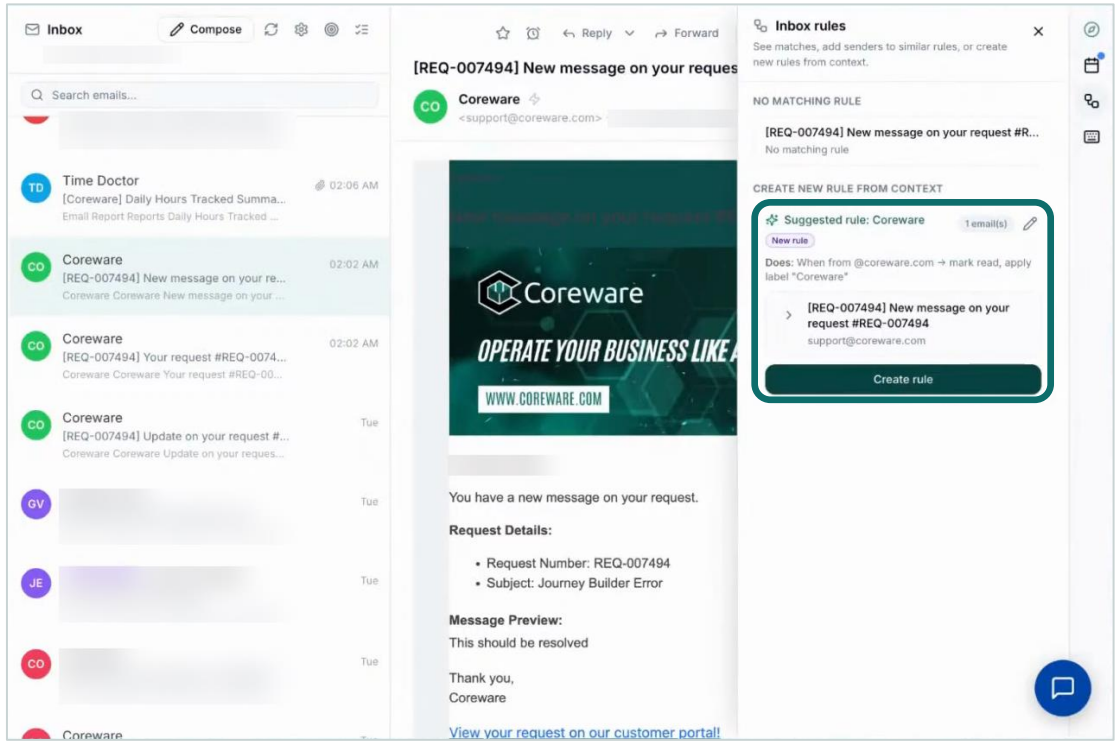
Build inbox rules from one email

WHERE TO FIND IT

Personal inbox › open a message › Rules icon

HOW IT WORKS

Open an email from your distributor and click Rules. Coreware drafts the rule for you, for example "anything from that distributor's email domain gets marked read and labeled with their name." It finds every past email that matches, lets you skip any groups you don't want, and applies the rule to the rest.



Watch: coreBLAST Ep. 18 at 17:23 · Demo data from the webinar · timestamp: 17:46

Try it: Make a rule from one vendor's email.

AUTOMATION 6 OF 10

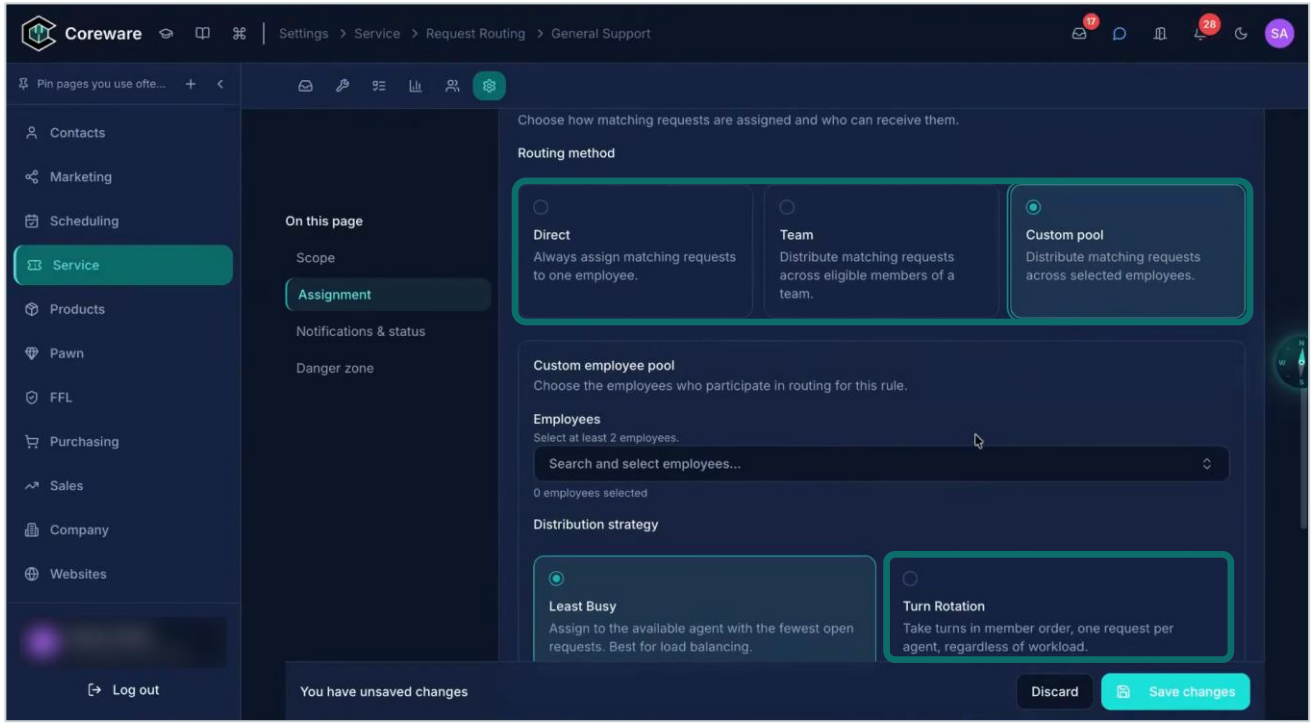
Assign new requests automatically

WHERE TO FIND IT

Service settings › Request routing

HOW IT WORKS

Route by request type, contact, contact type, tag, category or priority to a person, team or custom pool, using least busy or rotation. Notify adds a manager to every request of that type.



Watch: coreBLAST Ep. 20 at 1:12:57 · Demo data from the webinar · timestamp: 1:14:30

Try it: Route one request type on rotation and notify yourself.

AUTOMATION 7 OF 10

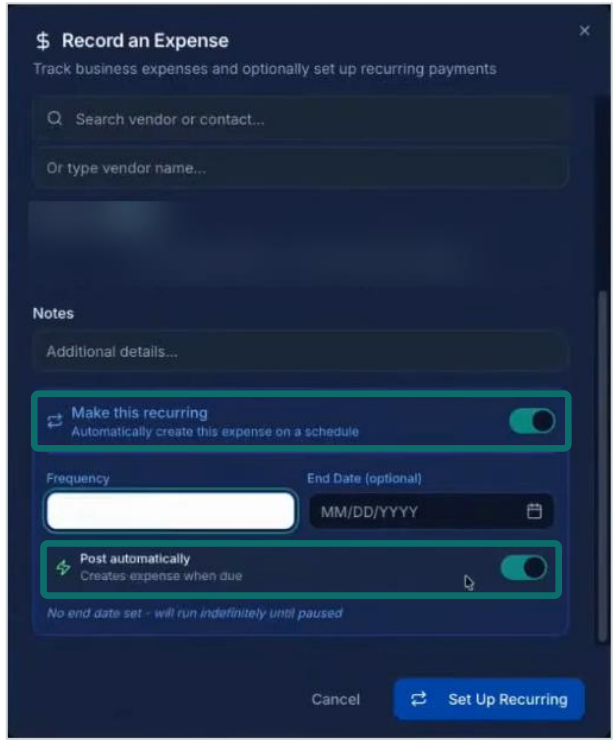
Automate recurring expenses

WHERE TO FIND IT

Accounting › Expenses › mark as recurring

HOW IT WORKS

Mark an expense as recurring and choose the frequency. Then have it post automatically, or create the expense and hold it for review.



Watch: coreBLAST Ep. 14 at 27:58 · Demo data from the webinar · timestamp: 28:36

Try it: Set rent to post automatically each month. Set the electric bill to Hold for review so you can enter that month's amount.

AUTOMATION 8 OF 10

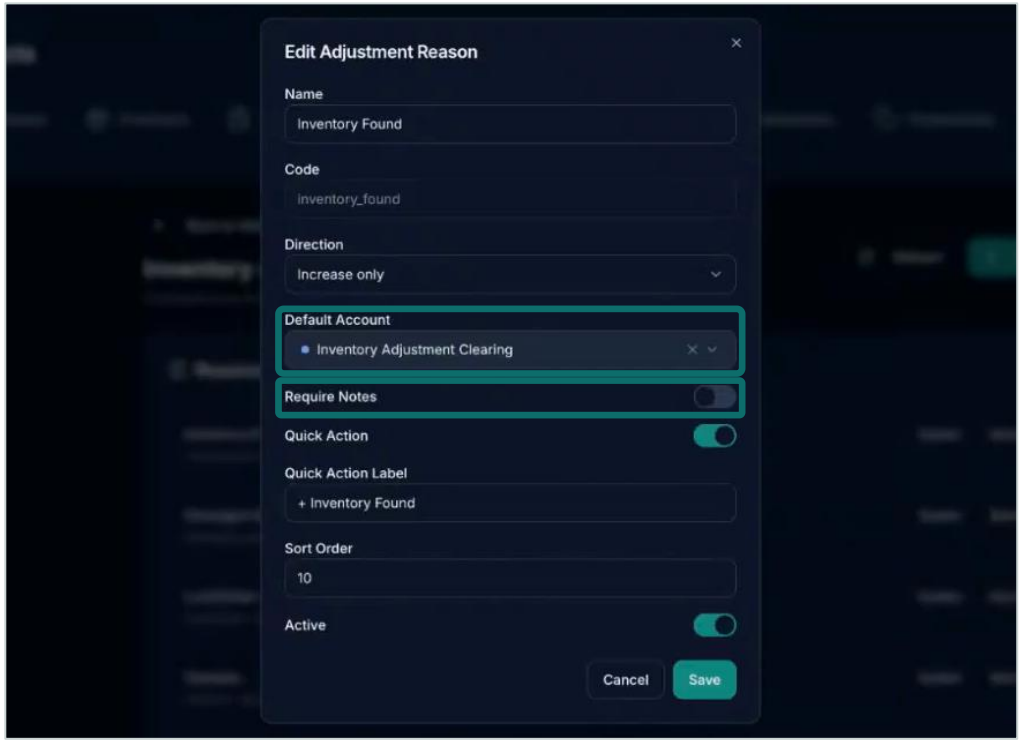
Post inventory adjustments to the right account

WHERE TO FIND IT

Products › Settings › Product Data › Inventory Adjustment Reasons

HOW IT WORKS

Each reason has its own default account, so lost stock and a demo case of ammo post separately. Turn on Require a note and staff have to say why.



Watch: coreBLAST Ep. 17 at 38:29 · Demo data from the webinar · timestamp: 39:43

Try it: Require a note on your marketing reason.

AUTOMATION 9 OF 10

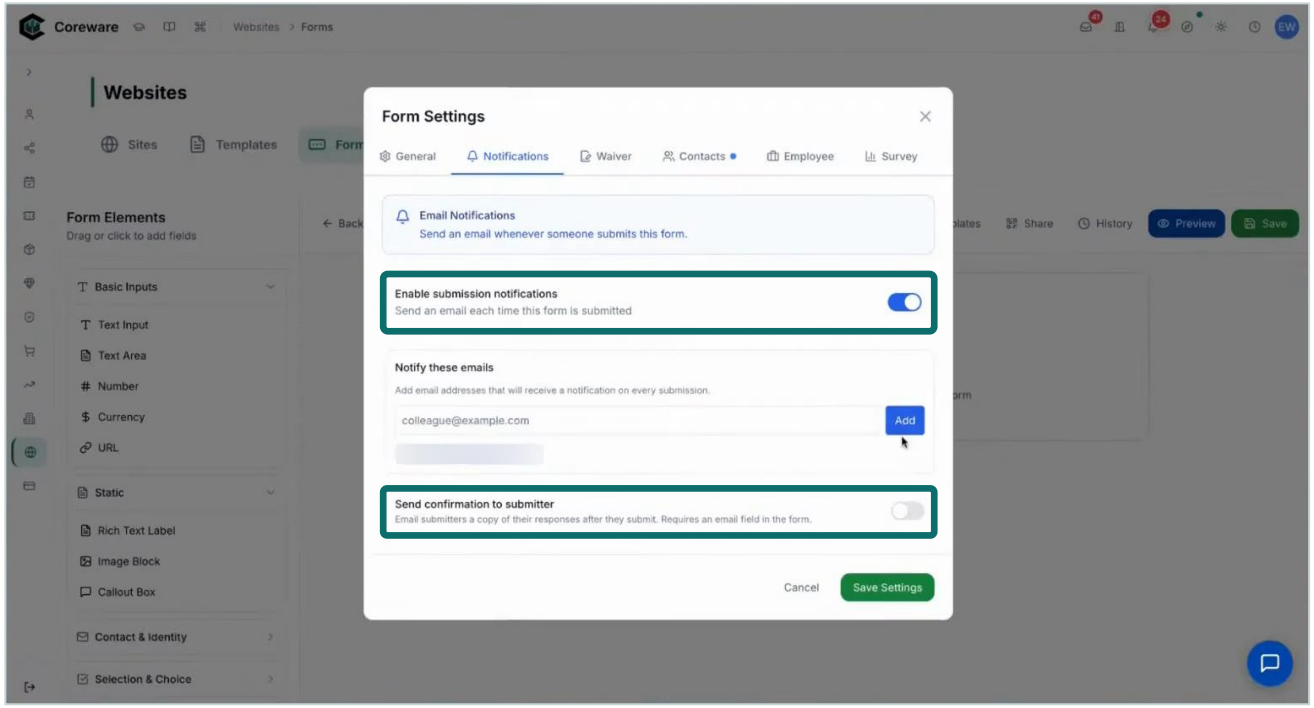
Get notified when a form is submitted

WHERE TO FIND IT

Websites › Forms › open a form › Settings › Notifications

HOW IT WORKS

Notify named staff on every submission and send the submitter a confirmation. Link the form to Contacts to create or update the contact.



Watch: coreBLAST Ep. 13 at 1:30:49 · Demo data from the webinar · timestamp: 1:31:17

Try it: Add yourself to notifications on your busiest form.

AUTOMATION 10 OF 10

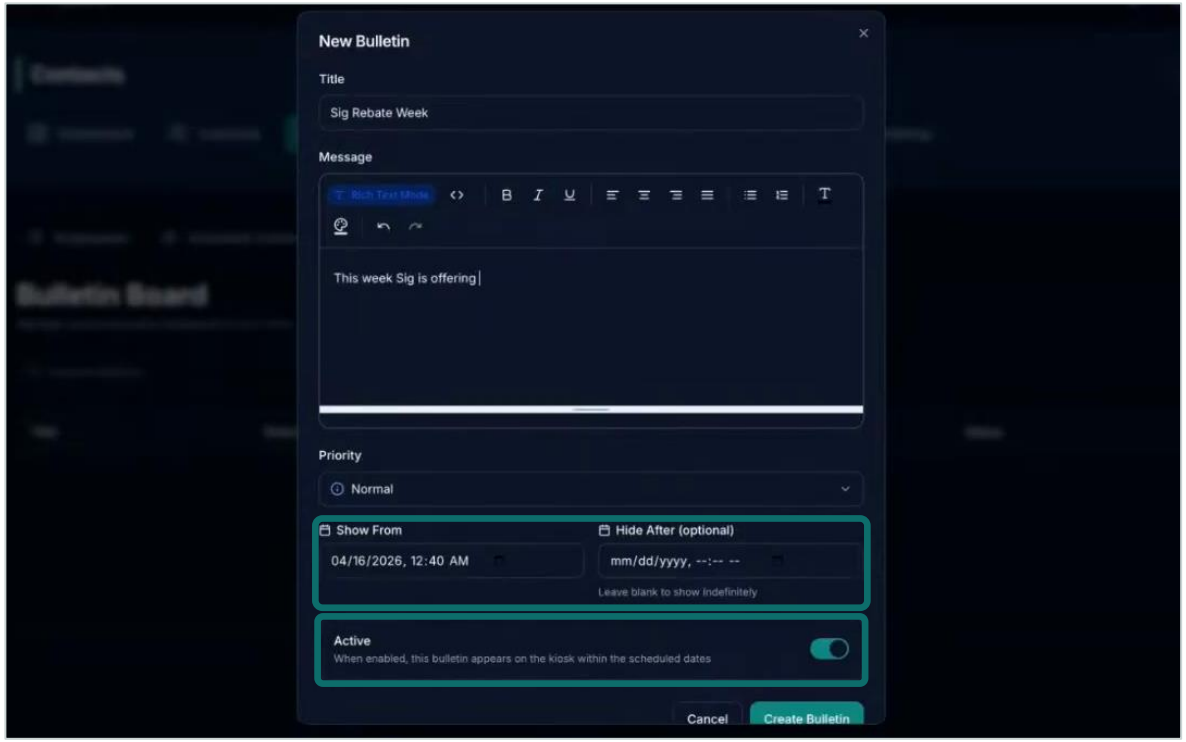
Schedule promos on the clock-in screen

WHERE TO FIND IT

Contacts › Employees › Bulletin Board

HOW IT WORKS

Give a bulletin a start and end date and it shows on the kiosk only during that window. Bulletin board settings can also rotate in a daily message CoreY writes from your instructions.



Watch: coreBLAST Ep. 10 at 2:10:29 · Demo data from the webinar · timestamp: 2:11:05

Try it: Schedule next week's promo.

YOUR TURN

Pick one to switch on today.

Every setting here came from a coreBLAST replay. Tap the source on any slide to jump to that moment.

Coreware

ALL 10 AUTOMATIONS

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6. Assign new requests automatically ›
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8. Post inventory adjustments to the right account ›
9. Get notified when a form is submitted ›
10. Schedule promos on the clock-in screen ›