Automated Jobs (Auto Jobs) - How To's

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Overview

Automated Jobs (Auto Jobs) allows administrators to schedule predefined system processes to run automatically in 1place. Instead of manually performing certain recurring tasks, an administrator can configure an automated job and specify when it should run.

Automated Jobs can be used for processes such as:

- **Integrations** - Run scheduled integration-related processes.
- **Invoicing** - Automatically process certain invoice-related tasks.
- **Inventory** - Run scheduled inventory processes.
- **Quotes** - Perform scheduled quote-related tasks.
- **System Maintenance** - Run certain system maintenance processes automatically.

When setting up an Automated Job, administrators can:

- Select the **Job Name** for the process they want to automate.
- Enable or disable the automated job.
- Configure the settings specific to the selected job.
- Select a **Recurrence Pattern**.
- Schedule the job to run **Daily, Weekly, or Monthly**.

The available jobs and their specific functions may vary. This article explains how to access and configure Automated Jobs, along with instructions for the individual automated processes available in 1place.

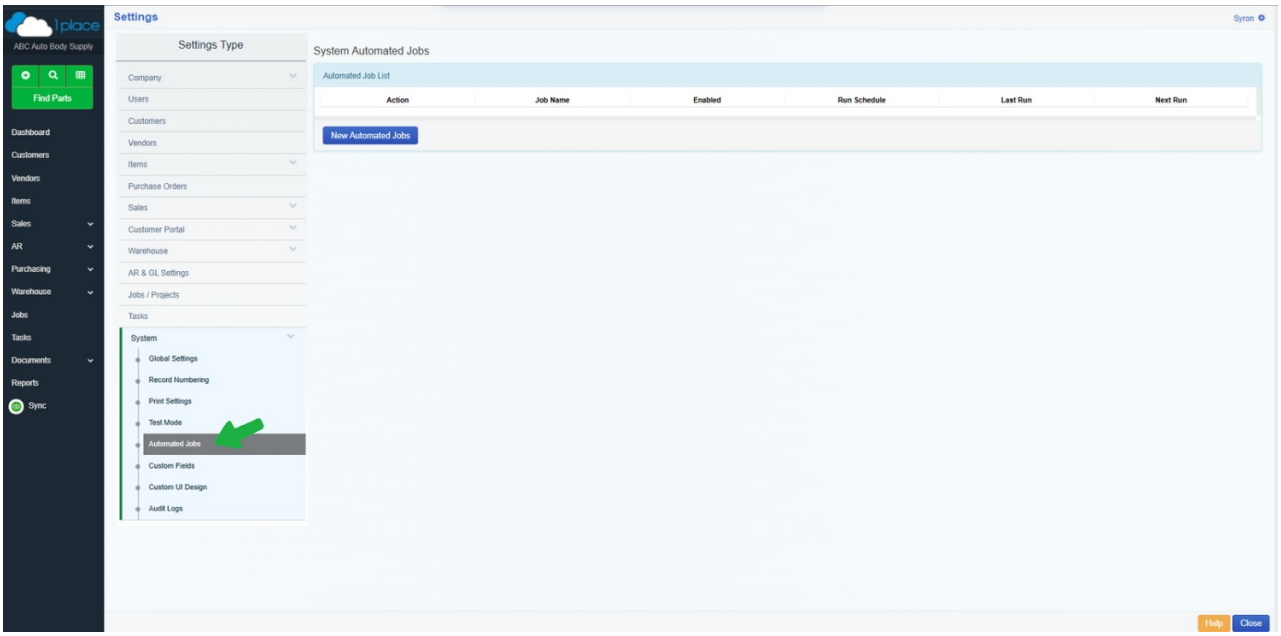
Accessing Automated Jobs

How to Access Automated Jobs

Automated Jobs can be accessed through the **System** settings in 1place.

To open Automated Jobs:

1. Click the **Gear** icon in the upper-right corner.
2. Select **Settings**.
3. Under the Settings options, select **System**.
4. Select **Automated Jobs**.



The **Automated Jobs** screen displays the automated jobs available in 1place and allows administrators to create and manage scheduled processes.

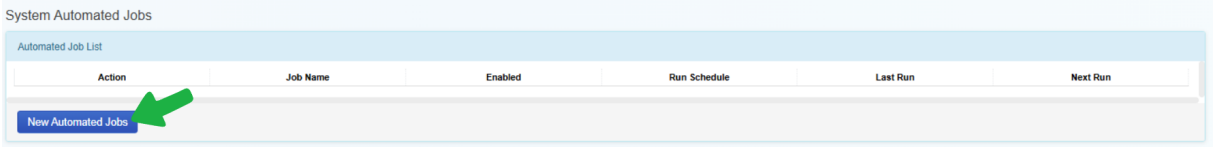
Managing Automated Jobs

Automated Jobs can be configured to run a specific system process automatically based on a schedule.

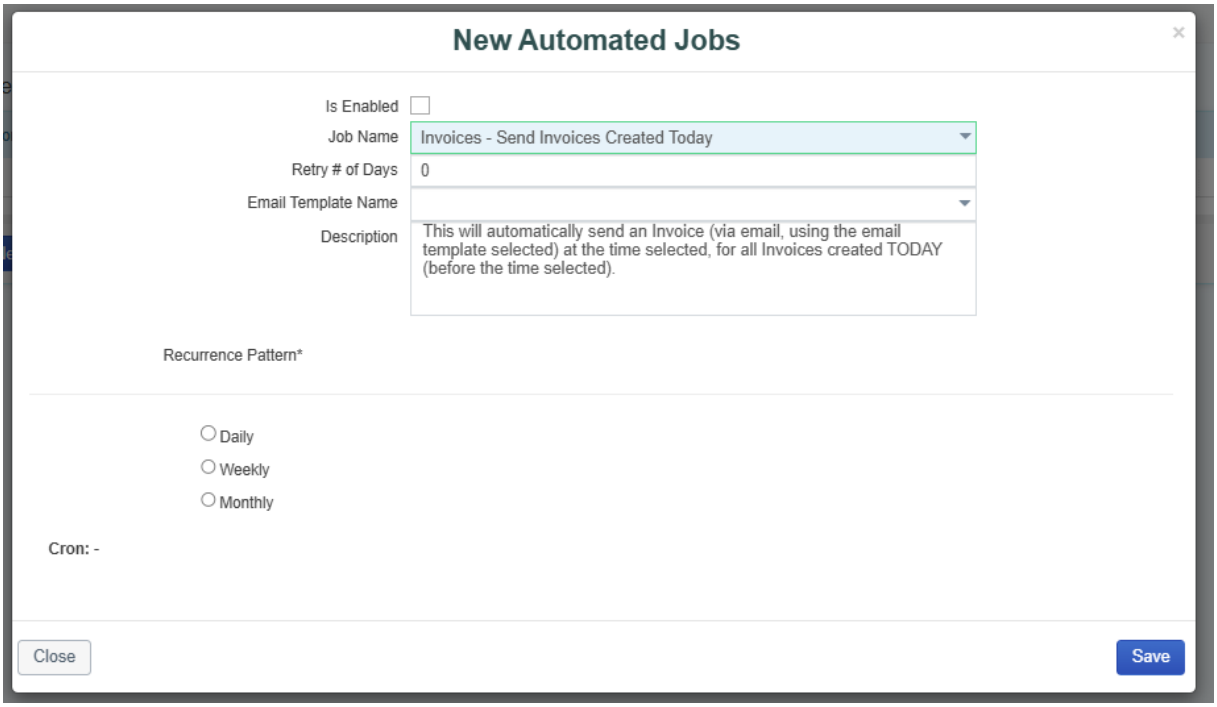
How to Create a New Automated Job

To create a new Automated Job:

1. From the **Automated Jobs** screen, click **New Automated Jobs**.



2. The **New Automated Jobs** window will appear.



3. Check **Is Enabled** if the job should be active after it is saved.

4. Select the appropriate process from the **Job Name** dropdown.

5. Review the fields that appear below **Job Name**.

   The fields displayed may vary depending on the selected job. Each automated job can have its own settings and requirements. The job-specific fields and their functions are explained in the individual How To section for that automated job.

6. Configure the **Recurrence Pattern** to determine when the job should run:
    - **Daily**
    - **Weekly**
    - **Monthly**
7. Review the schedule displayed under **Cron**.
8. Click **Save** to create the Automated Job.

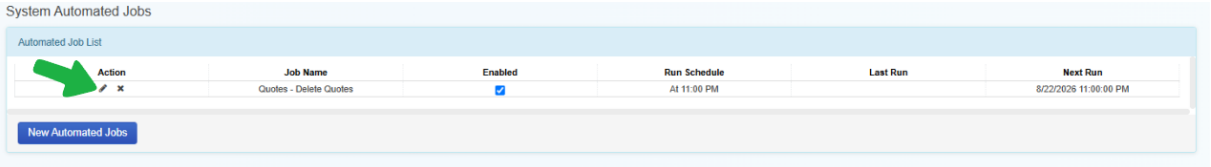
> **Note:** The fields and options displayed after selecting a **Job Name** are specific to that automated process. Refer to the corresponding job-specific How To section for instructions on configuring those fields.

How to Modify or Edit an Automated Job

Existing Automated Jobs can be updated when you need to change their settings, schedule, or other job-specific information.

To edit an Automated Job:

1. From the **Automated Job List**, locate the automated job you want to modify.



2. Under the **Action** column, click the **Pencil** icon.
3. The Automated Job screen will appear.
4. Modify the fields as needed.
5. Click **Save** to save the changes.

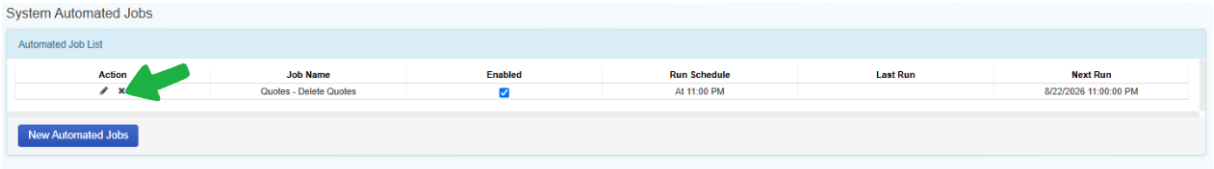
> **Note:** The fields available for editing may vary depending on the selected automated job.

How to Delete an Automated Job

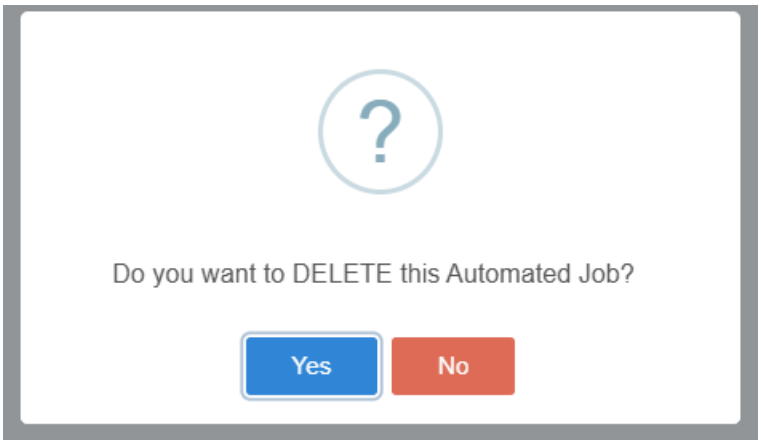
If an Automated Job is no longer needed, it can be deleted from the Automated Job List.

To delete an Automated Job:

1. From the **Automated Job List**, locate the automated job you want to delete.
2. Under the **Action** column, click the **X** button.



3. A confirmation message will appear:



4. Click **Yes** to proceed with the deletion.

Automated Jobs and Their Functions

Automated Jobs perform scheduled tasks in 1place, such as processing integration data, maintaining records, sending invoices, and supporting system operations. Understanding the purpose and functions of each job helps administrators identify which processes are automated and why they may be needed.

Integration Related Jobs

Integration jobs support the exchange or processing of information between 1place and connected external systems.

Integrations - CCC - Invoice Postings

> Handles invoice postings associated with the CCC integration, supporting the transfer of invoice information from 1place to CCC.

Integrations - CCC - Shop Registrations

Handles shop registration activity associated with the CCC integration, supporting the exchange or processing of shop registration information between 1place and CCC.

Integrations - OPSTrax - Invoice Postings

Handles invoice postings associated with the OPSTrax integration, supporting the transfer of invoice information from 1place to OPSTrax.

Integrations - Sage Intacct - Inventory Adjustment (JE)

Handles inventory adjustment information for the Sage Intacct integration, supporting the recording or transfer of inventory adjustments as journal entries (JE).

Integrations - Sage Intacct - Sales Revenue (JE)

Handles sales revenue information for the Sage Intacct integration, supporting the recording or transfer of sales revenue as journal entries.

Data Maintenance Jobs

Data maintenance jobs support routine record management and the capture or cleanup of information in 1place.

Integrations - Delete Request Table Log

Maintains request table logs associated with integrations. The exact records deleted and any retention rules depend on the job's implementation.

Inventory - Snapshot Sales & Qtys

Captures a snapshot of sales and quantity information related to inventory. This may support historical tracking or reporting, depending on how the job is implemented.

Quotes - Delete Quotes

Handles the automatic deletion of quotes according to the job's configured rules. Confirm which quotes qualify for deletion before changing this job's configuration.

Automated Communication Jobs

These jobs automate routine communication-related tasks.

Invoices - Send Invoices Created Today

Handles invoices created during the current day for automated delivery. The recipients, delivery method, and invoice selection criteria depend on the job's configuration.

System and Security Jobs

These jobs support system operations and processes related to Customer Portal security.

System - Run SQL Script

Executes a configured SQL script to perform a database operation or maintenance task. The specific action depends on the script assigned to the job. Changes should be handled by authorized technical personnel because scripts may affect system data.

Settings - Customer Portal - Auto Job (Login Abuse)

Supports an automated process associated with Customer Portal login abuse. The exact detection criteria and actions performed depend on the job's implementation.