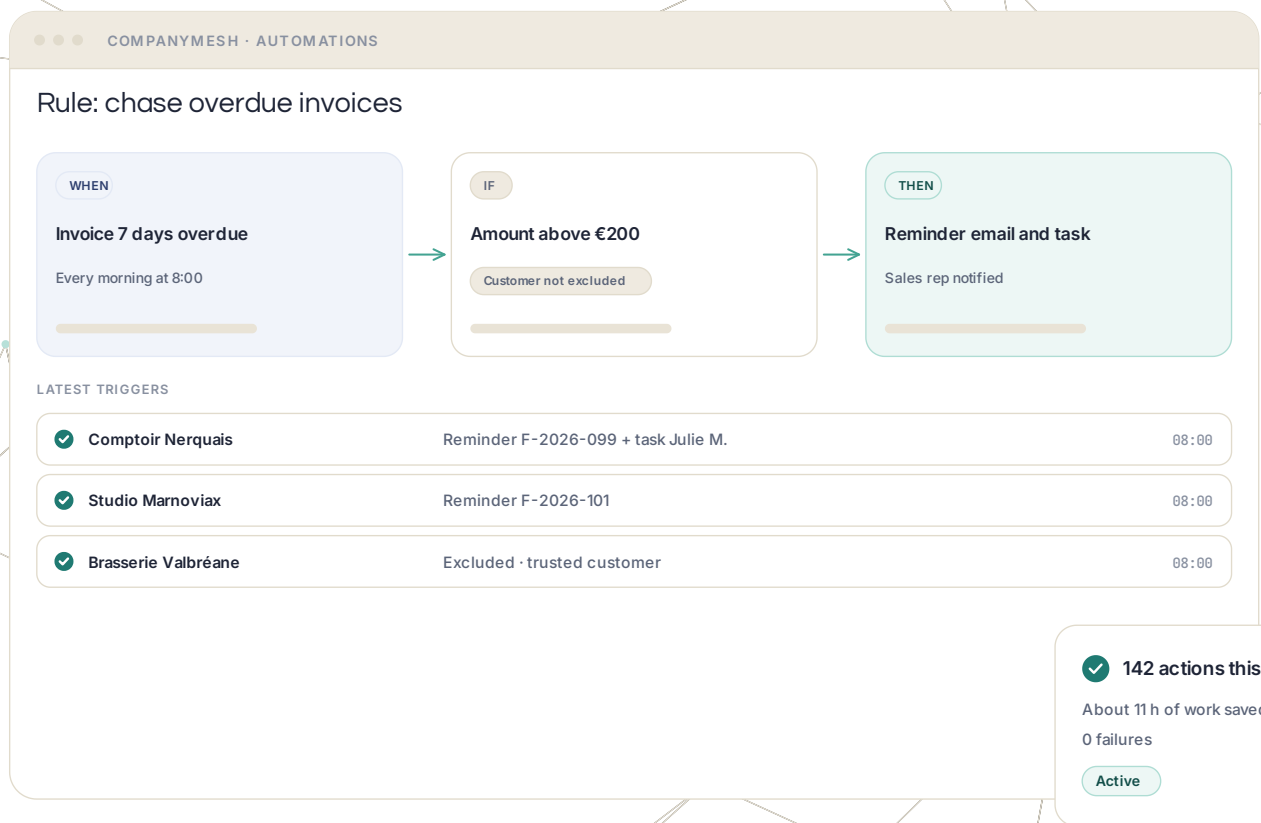


Automations

Repetitive tasks take care of themselves.



Repetitive tasks take care of themselves.

Chasing, notifying, changing a status, creating a task, sending a document: much of your admin work follows simple rules. The Automations module runs them for you, reliably and traceably, so your teams can focus on what matters.

Time freed up

Repetitive actions are handled for you.

Nothing forgotten

Every rule applies, every time.

Full traceability

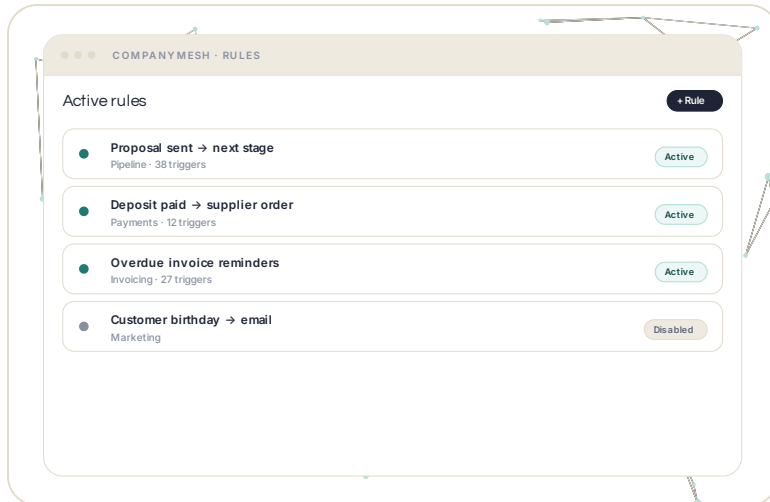
Every trigger is logged.

No development needed

Simple rules you can change at any time.

In this module

- 1 "When, if, then" rules
- 2 A library of actions
- 3 Scheduled tasks
- 4 Log and monitoring
- 5 Custom scenarios



1 “When, if, then” rules

You describe it, the tool does it.

A rule combines a trigger (an event), conditions and one or more actions. Rules are created and edited from the settings, with no development required.

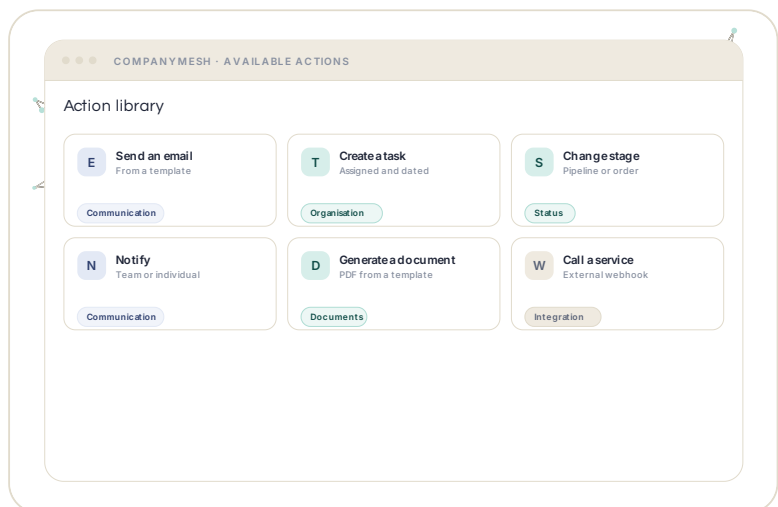
What it enables

- Triggers across all modules
- Chained actions
- Combinable conditions
- Instant switch on and off

2 A library of actions

Everything that can be automated.

Change a stage, send a template email, create a task, notify a team, generate a document, call an external service: actions combine freely.



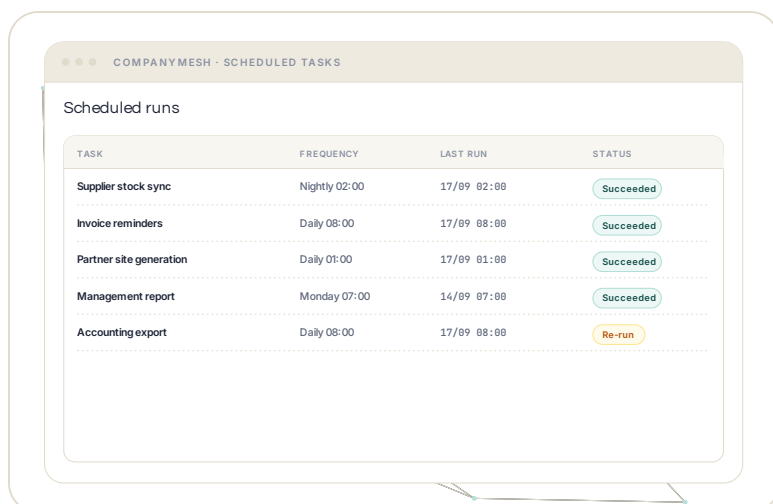
What it enables

- Emails and notifications
- Status and stage changes
- Tasks and reminders
- Document generation

3 Scheduled tasks

The right job, at the right time.

Jobs run at set times: syncs, reports, reminders, clean-ups. Even a website hosted without a scheduler can be driven from the platform.



TASK	FREQUENCY	LAST RUN	STATUS
Supplier stock sync	Nightly 02:00	17/09 02:00	Succeeded
Invoice reminders	Daily 08:00	17/09 08:00	Succeeded
Partner site generation	Daily 01:00	17/09 01:00	Succeeded
Management report	Monday 07:00	14/09 07:00	Succeeded
Accounting export	Daily 08:00	17/09 08:00	Re-run

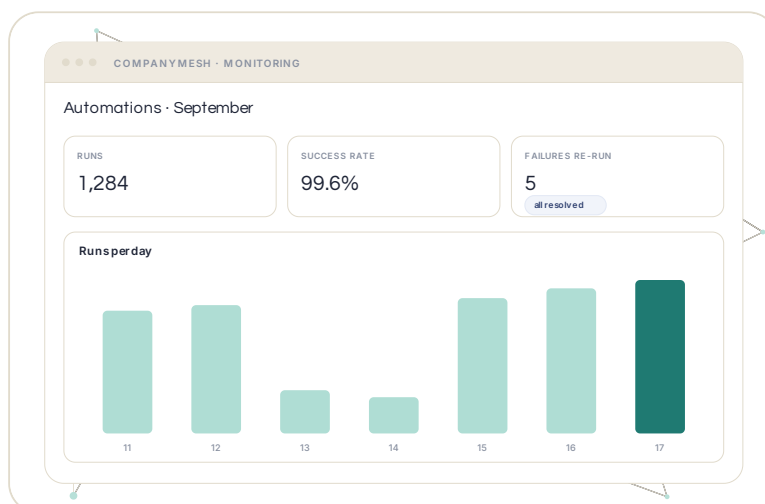
What it enables

- Daily, hourly and monthly runs
- Control of external websites
- Protected secrets
- Retry on failure

4 Log and monitoring

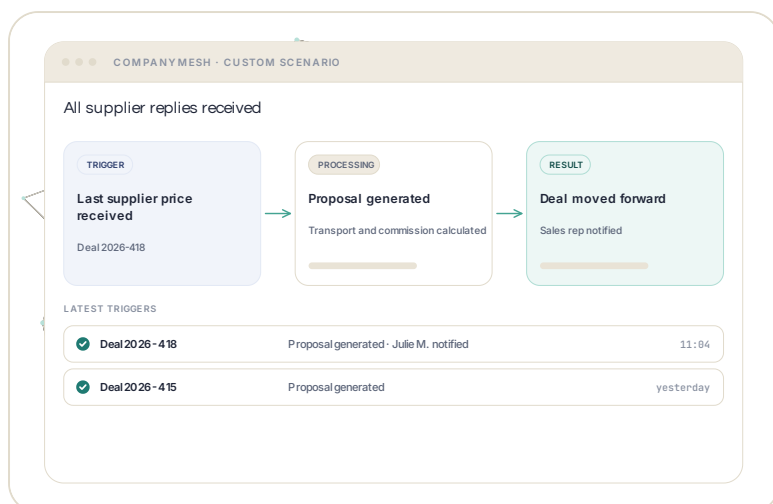
You know what happened.

Every run is recorded along with its result. Failures are flagged and can be run again.



What it enables

- Complete history
- Failure alerts
- Manual re-run
- Run statistics



5 Custom scenarios

When a simple rule is no longer enough.

For processes that span several tools or call for precise business logic, we build dedicated scenarios, monitored just like the rest.

What it enables

- Multi-tool processes
- Business-specific logic
- Unified monitoring
- Grows with your business

Example — As soon as all supplier prices are in, the deal moves forward, the proposal is generated and the sales rep is notified.

TAILORED

Adapted to your business

Together with your teams, we pinpoint the repetitive tasks in **your** day-to-day work and turn them into rules. More complex scenarios (several systems, detailed business conditions) are custom-built and plugged into the same log.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Automation platforms

Zapier

Make

n8n

Communication

Email

SMS

Slack

Microsoft Teams

Scheduled tasks

External websites

Shared hosting

API

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.pipeline Pipeline & opportunities

erp.billing Invoicing

auto.api API & connectors

auto.ai Built-in AI

comms.mail Integrated email

Let's talk about your future tool

Tailored demo, by appointment.

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