TechSolve Task Automation Setup Guide

Introduction

Maximize productivity with TechSolve's Task Automation feature, designed to streamline repetitive workflows and reduce manual effort.

Getting Started with Automation

Log into TechSolve and navigate to the "Automation" section via the sidebar. Ensure your account has admin privileges to create and manage automation rules. Start by clicking "New Automation Rule" to begin setup.

Defining Triggers

Triggers initiate automation. Select from options like "Task Created," "Deadline Approached," or "Status Changed." For example, choose "Task Created" to automate actions when a new task is added. Specify conditions such as project type or team assignment to refine the trigger scope.

Setting Actions

Actions define what happens when a trigger occurs. Available actions include sending notifications, assigning team members, updating task statuses, or creating follow-up tasks. Combine multiple actions for complex workflows—e.g., notify a manager and set a priority level simultaneously.

Testing Your Automation

Before activating, use the "Test Rule" feature to simulate the automation. Create a dummy task matching your trigger conditions and verify that actions execute as expected. Adjust settings if notifications are delayed or assignments are incorrect.

Advanced Options

- **Scheduling**: Limit automation to specific hours (e.g., 9 AM–5 PM).
- **Integrations**: Link with email or third-party tools like Slack for broader notifications.
- **Logging**: Enable activity logs to track automation history and troubleshoot errors.

Best Practices

- Keep rules simple to avoid conflicts between overlapping automations.
- Regularly review logs to ensure rules remain relevant as team workflows evolve.
- Notify your team about new automations to maintain transparency.

Support

For additional support, refer to the TechSolve help portal or email support@techsolve.com.