

Knowledge base > Administration > Functions > Automations

Automations

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Automations minimizes administrative work by automatically enrolling learners in relevant courses. For example, everyone who works in a specific team can automatically receive the team-specific playbook. To use Automations, <u>custom fields</u> need to be enabled (contact Learnifier support)

Available from: Enterprise

Note: when using Automations, learners are not automatically invited by email to the course, they will simply have access to it. Therefore, we recommend you always use Automations in combination with <u>Automated</u> <u>communication</u> if you wish to send automatic invitations to the learners.

1. Go to the "Automations" tab

Learnifier Dashboard Projects Users + Library + Reports Automations Settings +	Go To 🔻	۹.	•	Demo 🕶
New Project Get started with a new project by following the simple step-by-step instructions.				
Add Project				
Favorite Projects Click the star next to a project to add it as a favorite.				
View All Projects				
Invite an administrator				
Invite Administrator				
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1. Click "Add automation".

Cearnifier Dashboard Projects Users + Library + Reports	Automations Settings 🕶	бо то 🔹 🔍 🌲 🤱	Dem
Automations		Add Automat	ion
NAME	RULE	STATUS	
Everyone at Learnifier gets Brand Guide	Custom field "Company" equal to "Learnifier"	Live	•
Everyone at Learnifier gets Introduction to Learnifier	Custom field "Company" equal to "Learnifier"	Live Actions	•

- 1. Choose "Normal mode" or "Advanced mode" depending on how you wish your automation to work. In "Normal mode," you can set only one rule. In "Advanced mode", you can combine several rules.
- 2. Use the symbols to create an automation that suits your needs. Here is a list of the available symbols to use:

Note

- "=" this means equals to.
- "!=" this means not equal to.
- "<-" means equal to or smaller than
- "->" means equal to or bigger than
- "<" means smaller than
 - 1. Set the status to live if you wish to activate it immediately or keep it as a draft.
 - 2. Scroll down and choose the course you wish to automate enrollments in.

Learnifier	Dashboard Projects Users 🕶 Library 👻	Reports Automations Settings 🕶	Go To 👻 С		Demo 🗸
Automo	Add automation			×	Automation
NAME	Name: Everyone in Customer Success gets Customer S	uccess Playbook			
Everyone a					Actions 🔻
Everyone a	Status:				Actions 🔻
	Rule: Advanced Mode ▼				
	The current rule matches 8 users.				
	Company	▼ = ▼ Learnifier	•	×	
		AND			
	Department	▼ = ▼ Customer Success	•	×	
		AND			
		OR			
					\bigcirc

1. All done!

Related Content

- Automated communication
- <u>Custom fields</u>