# 6 Game-Changing Automation Rules

## To Make Your Next Peak Season Stress-Free

**GROW FEARLESSLY**

# Automation Is The Secret To Peak Season Success

Peak Season is a huge opportunity for all retailers, but for those without a Retail Operating System that makes automation easy, it typically
brings a dilemma.

**Without automation, merchants can:**

- Bring in lots of temp staff to cope with the workload
- Attempt to 'make do' with the existing team

The trouble is, neither option is ideal. The first option involves decreased profit due to extra headcount and increased errors due to new staff. The second option involves pushing your staff to the brink as they rush to get orders out of the door in time.

Luckily, there's a better solution  — and it's one our customers swear by to make peak periods easier, cheaper and less stressful: automation.

"We previously had a lot of manual workflows and Brightpearl has really transformed things.

From automatically creating POs to speeding up order processing, we save hours every week by using it and it helps us avoid making mistakes, too."

**Hubert Kosc, Managing Director, Arthauss Furniture**

# How Brightpearl's Automation Engine Works

It's easy to set up customized rules to suit your business. Each rule requires a 'condition' and an 'action' to be set - there are lots of options for each.

This guide will walk you through six of the most effective automation rules, which our customers have tried and tested during peak season.

condition     action

# Rule #1
# Automatically fulfill your orders

When order volumes spike in Peak Season, order fulfillment quickly becomes challenging, so it's no surprise that automated fulfillment is the most popular workflow with Brightpearl customers.

Brightpearl's Automation Engine automatically fulfills any order where the inventory is available and the payment is received.

## How it works ▼

### CONDITIONS:

You can set up the rule's conditions to check the order's inventory allocation status, it's payment status and order status. This can help you exclude orders that are in a draft status or on hold saving your warehouse staff valuable time which is vital during your peak.

### ACTIONS:

Auto-fulfill orders. This action comes with several options, such as whether or not to allow partial fulfillment and whether you want to allow the order to be fulfilled from an alternative warehouse.

# Rule #2
# Add a free gift to big orders

During Black Friday and Cyber Monday, lots of Brightpearl customers like to incentivise customers to increase their spend by offering a free gift once a certain threshold is met, or for first-time buyers. Manually flagging every eligible order and passing the correct info on to the warehouse team can inevitably cause issues, risk delays and take up lots of valuable time. The Automation Engine can handle it without breaking a sweat.

## How it works ▼

### CONDITIONS:

it's easy to configure the conditions to meet your unique needs and specifications. Want to only reward new customers, VIP customers or customers that come via certain sales channels? No problem! Want to specify a minimum spend for a free gift? Easy!

### ACTIONS:

Use 'Free SKU' action to create a free gift. It's that simple. Then the orders that have met the conditions will automatically have the free gift adding to the picking list.

# Rule #3
## Always use the right shipping method

Many retailers use different shipping methods for different products. The process of selecting the correct shipping option manually for each product can be tedious and time-consuming. During peak periods, our customers simply couldn't keep up — until they switched to automation.

## How it works

### CONDITIONS:

This automation rule offers various useful conditions that you can set to make sure the right shipping method is used, every time. You can set conditions based on total weight, total value, sales channels, destinations or certain product specifications that need adapted shipments.

### ACTIONS:

Update the shipping method to the relevant one. Automating with Brightpearl takes tedious manual tasks off your to do list. Brightpearl customers ship orders 45% faster with the Automation Engine.

# Rule #4
## Route orders to the best warehouse

With customizable rules to automatically choose the optimal warehouse, our customers can ensure optimal delivery times and keep the delivery promises they make to shoppers.

## How it works ▼

**CONDITIONS:**

This rule is easy to configure so that orders are allocated to different warehouses depending on things like its destination or its contents. You can also choose to only apply this action if there isn't stock in your default warehouse.

**ACTIONS:**

Update the warehouse to the most relevant location. Brightpearl customers typically reduce their labor costs by 50% after ditching manual processes and embracing automation - and so could you.

# Rule #5
## Recognize revenue when goods are shipped

Invoicing sales orders is vitally important for all retailers but if you've ever done it manually then you'll know how frustratingly time consuming it can be. During peak season, time is in short supply — which is why lots of our customers use the Automate Engine to process invoices.

## How it works ▼

**CONDITIONS:**

Brightpearl allows you to create a rule that automatically invoices orders when they are shipped. You can even add channel-specific conditions and choose whether or not to automatically email an invoice to your customers.

**ACTIONS:**

Auto-invoice customers. As well as saving time, this popular automation rule ensures that revenue is recognized on the same day that goods are dispatched - which means easier accounting.

# Rule #6
# Automatically detect fraudulent orders

Online fraud is an issue for all e-commerce businesses — but peak periods can be particularly prone to fraud. Without the time to manually check the legitimacy of each and every order, your business can be vulnerable, which is where automation comes in.

## How it works ▼

✓ **CONDITIONS:**

Our Automation Engine lets you be creative with the fraud detecting rule. For instance, you could create a rule with the condition of "delivery address is not billing address" to identify potentially fraudulent orders. Or maybe you'd like a rule to identify orders paid using a notoriously risky payment method, especially where the value is over a certain amount.

❯ **ACTIONS:**

Simply add an action to update the order status to the "suspected fraud". This means you can ensure someone verifies it before it's fulfilled.

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# Next steps...

Brightpearl's Automation Engine is particularly beneficial during Peak Season, but it also makes a huge difference to our customers every day - helping them save an average of two whole months a year, cut staff costs in half and reduce errors by 65%

Are you still running your business using manual workflows? Embrace automation now so that you reap the rewards all year round — and so your next peak period is less stressful and more profitable.

**To see the Automation Engine (and Brightpearl's other built-for-retail features) in action.**

**Book a demo today**

# About Brightpearl

As a leading retail operating system, **Brightpearl** is packed with dedicated features that will help you smash your goals during peak season and beyond. Our system includes a market-leading

**Demand Planner** that helps you accurately forecast demand (even taking into account seasonality and promotions) and a huge library of **Plug & Play integrations** so you can add new sales channels in minutes.

Brightpearl also offers financial management, inventory and sales order management, purchasing and supplier management, CRM, fulfillment, warehouse and logistics. We handle more than 10 million transactions and $5bn of business a year.