

Business Rules, Workflow and Marketing Automation

How to create automatic rules for your CRM



What is a Business Rule, Workflow or Marketing Automation?

- Workflow is an automated process that can start working when you add or update: accounts, opportunities, cases, forms, or dates.
- There are many business objects within LeadMaster that can trigger workflow.
- Workflow can extend to outside systems via an API.
- Multiple processes can be triggered from a single action making this a powerful feature.

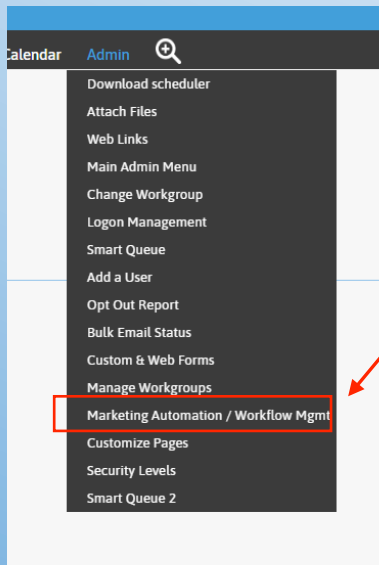
Benefits of workflow automation!

- Workflow automation is a time saving feature. You can automate repetitious tasks and perform multiple actions from a single workflow fired by a single checkbox. For example:
 - update the lead status
 - add a calendar event
 - send an email
 - reassign the record
 - send a text message
 - add a note
- Workflow can help you manage smart queues and add / subtract records from saved searches, also known as filters.
- Using workflow can provide consistency in data results and actions for reporting and analysis.

Who can create a Business Rule or Automation?

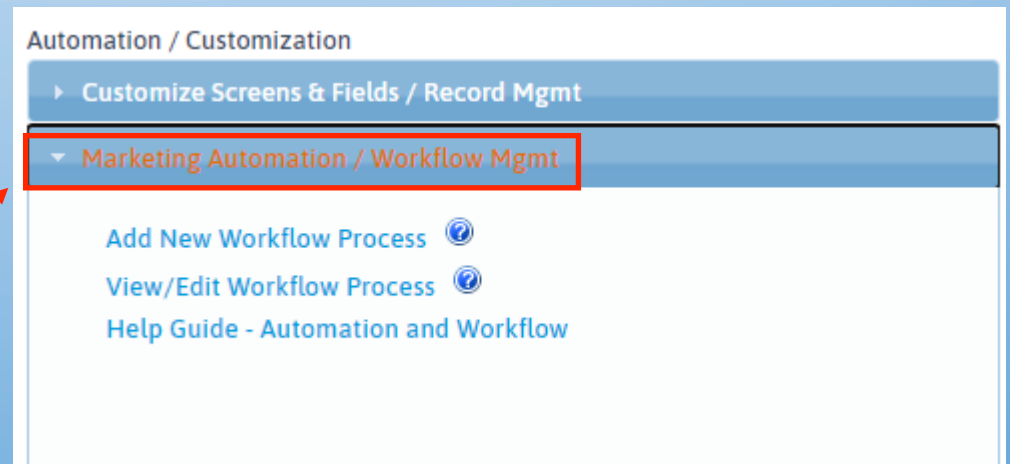
- Creating and maintaining workflows is a login privilege; generally reserved for admins.
- Automation is a powerful tool and needs to be thought out and planned. Flow charts and diagrams of the way you want things to work are helpful.
- There are 3 parts to consider:
 - The Trigger (when)
 - The Condition (if)
 - The Resulting Action(then)

Accessing Marketing Automation and Workflow



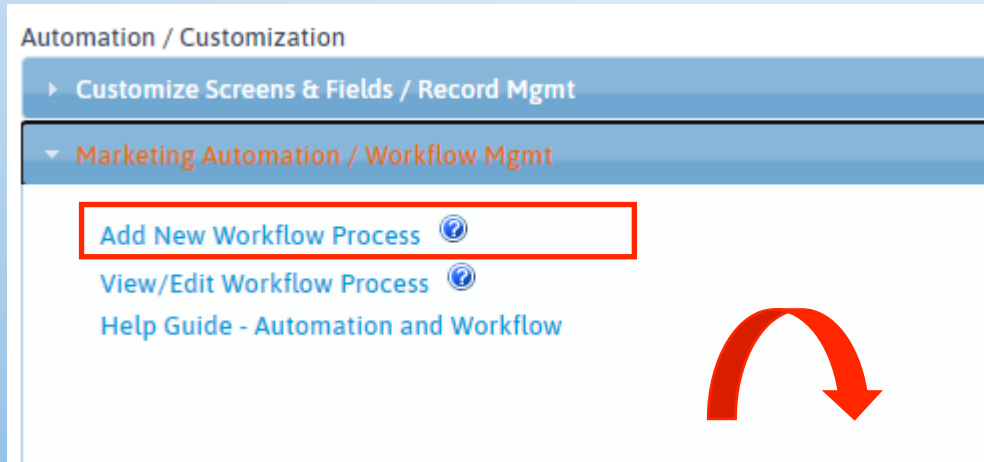
Marketing Automation/Workflow Mgmt may be located in the Admin dropdown

Administration



Or via the main admin page:
Administration area>>
Automation/Customization section>>
Marketing Automation/Workflow Mgmt

Adding New Workflow




Select Add New Workflow Process

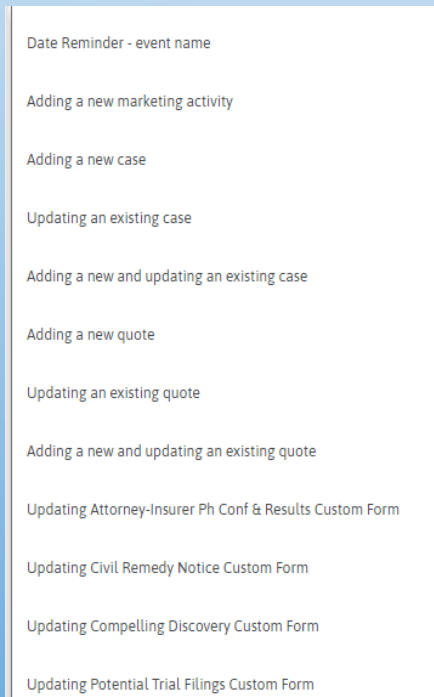
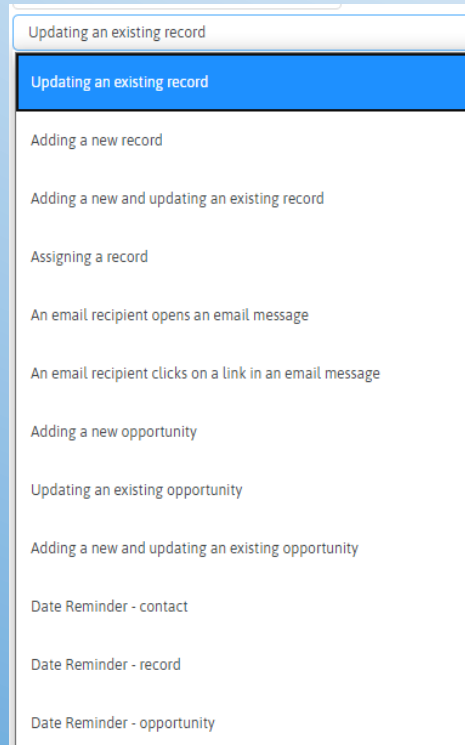
Business Rule Name:
Provide the name of
the workflow.

Helpful tip: make the
name relevant

A screenshot of a form titled 'Add New Business Rule'. At the top, there are two buttons: 'Business Rules List' and 'Help Guide'. Below these, there is a text input field labeled 'Business Rule Name:' which is highlighted with a red box. Below this is a dropdown menu labeled 'Rule Applies When' with a blue question mark icon, showing the selected option 'Updating an existing record'. At the bottom right of the form, there are two buttons: 'Save' (green) and 'Cancel' (grey).

Rule Applies When:
This is the trigger when the
automation will fire
Click 

Adding New Workflow



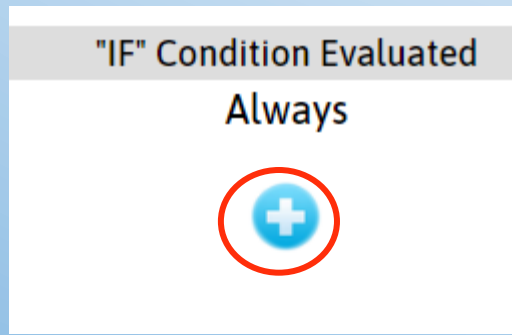
This list is a sample of the options for when a workflow can be triggered.




For example: **Adding a new record** or **Updating an existing record**.

There are many options; its important to understand your end goal.

Adding new workflow “IF” Condition

The first step was creating the condition of ‘when’, next step is identifying the conditions to define the when the workflow will perform its actions.



Click 
Select the Field and Operator
Click 
 when complete.





To create a Business Condition, please select from the below options:



Select a Field:



Select an Operator:

Select a Value:

Select a field


Business Condition: 

() AND OR  

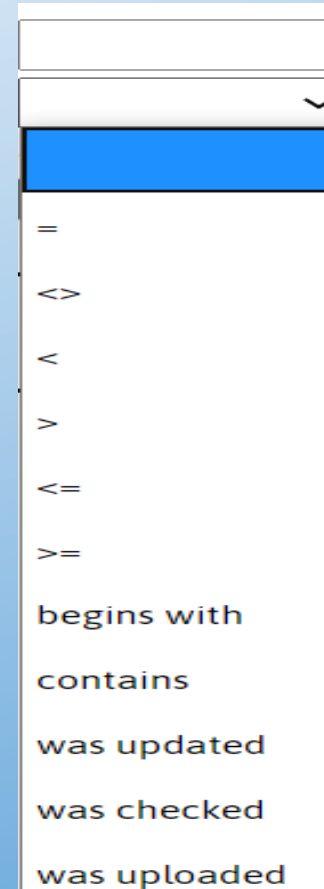
 

Note: You can add several conditions with and/or statements. We will discuss this in greater detail later.

Adding a new workflow Operator

The Operator is defined as:

- '=' is an exact match
- '<>' does not equal
- '<=' is less than or equal to the specified value
- '>=' is greater than or equal to the specified value
- 'begins with' filters data by contents that start with a defined character(s)
- 'contains' filters data for the specified character within a value.
- 'was updated' filters records that had the data in specified fields updated.
- 'was checked' applicable for Checkbox field type.
- 'was uploaded' applicable for File Upload type.

A screenshot of a dropdown menu for selecting a workflow operator. The menu is open, showing a list of operators. The first operator, '=', is highlighted with a blue background. The other operators are listed below it: '<>', '<', '>', '<=', '>=', 'begins with', 'contains', 'was updated', 'was checked', and 'was uploaded'. The dropdown menu has a white background and a blue border. The operators are listed in a simple, sans-serif font. The 'begins with', 'contains', 'was updated', 'was checked', and 'was uploaded' operators are in a smaller font size than the others.

Note: Not all operators are available for all conditions. For example date fields do not have the option 'was checked'.

Using the operator and the fields

How to use the Field and operator to create your workflow condition

Creating the condition is the logical path to execute a corresponding action.

For example:

When Lead Status (Field) = New Inquiry (Operator)

To create a Business Condition, please select from the below options:

Select a Field:

Select an Operator:

Select a Value:

Business Condition:

LeadStatus = 'New Inquiry'

[Help Guide](#)

To create a Business Condition, please select from the below options:

Select a Field:

Select an Operator:

Select a Value:

Business Condition:

LeadStatus = 'New Inquiry' AND LeadSource = 'Call In'

You can further define your condition with the use of AND/OR

Complex Conditions can be created with the use of the open and closed “ () ”

Complex conditions

Defining your conditions can be accomplished with the use of the open and close ()

For example: this workflow will execute on the rule when the **Lead Status AND Lead Source AND Acct Mgr** have the values specified.

Edit Condition

[Help Guide](#)

To create a Business Condition, please select from the below options:

Select a Field:

Select an Operator:

Select a Value:

Acct Mgr

=

Design Team

Insert

Business Condition: ⓘ

(LeadStatus = 'New Inquiry' AND LeadSource = 'Call In') AND (Acct Mgr = 'Design Team')

() AND OR

Save

Cancel

Complex Conditions

Defining your conditions can be accomplished with the use of the open and close ()
And using OR

This workflow will
execute on the rule
when the Lead Status
OR lead source AND
Acct Mgr have the
values specified.

Keep in mind that the
Open and Close
condition be satisfied
before the AND is
added to the equation.


The screenshot shows a web interface titled "Edit Condition" with a "Help Guide" button. Below the title, it says "To create a Business Condition, please select from the below options:". There are three dropdown menus: "Select a Field:" with "Acct Mgr" selected, "Select an Operator:" with "=" selected, and "Select a Value:" with "Design Team" selected. An "Insert" button is next to the value dropdown. Below these is a "Business Condition:" label with a blue icon. A text box contains the formula: `(LeadStatus = 'New Inquiry' OR LeadSource = 'Call In') AND (Acct Mgr = 'Design Team')`. Below the text box are buttons for "(", ")", "AND", and "OR". At the bottom right are "Save" and "Cancel" buttons.

It is recommended testing extensively when creating any
workflow. Ask your representative about a sandbox for
testing.

Creating Resulting Actions

"Then" Resulting Action(s)

No resulting actions have been defined for this business rule



[Close](#)



Add Action

[Help Guide](#)

To create an Action, please select from the below options:

Action


- ☐ Add Call Back/Event
- ☐ Update Record
- ☐ Send Email
- ☐ Add a(n) Activity
- ☐ Add Task
- ☐ Delete Record
- ☐ Update Call Action
- ☐ Attach Custom Form
- ☐ Assign Record
- ☐ Add Ticker Message
- ☐ Send Text Message
- ☐ Upload Record
- ☐ Archive Record
- ☐ Push Notification
- ☐ Add to Lead Nurturing Track
- ☐ Stop Lead Nurturing Track
- ☐ Request an Update to the Record
- ☐ Add to Sales Rep Comments/Notes
- ☐ Add Opportunity
- ☐ Skip to

Connectors

- ☐ Send Fax

[Next >>](#)

[Cancel](#)

Click  to display options
For resulting action

Creating Resulting Actions

Add Action

[Help Guide](#)

To create an Action, please select from the below options:

Action

<input type="radio"/> Add Call Back/Event	<input type="radio"/> Attach Custom Form	<input type="radio"/> Add to Lead Nurturing Track
<input type="radio"/> Update Record	<input type="radio"/> Assign Record	<input type="radio"/> Stop Lead Nurturing Track
<input type="radio"/> Send Email	<input type="radio"/> Add Ticker Message	<input type="radio"/> Request an Update to the Record
<input type="radio"/> Add a(n) Activity	<input type="radio"/> Send Text Message	<input type="radio"/> Add to Sales Rep Comments/Notes
<input type="radio"/> Add Task	<input type="radio"/> Upload Record	<input type="radio"/> Add Opportunity
<input type="radio"/> Delete Record	<input type="radio"/> Archive Record	<input type="radio"/> Skip to
<input type="radio"/> Update Call Action	<input type="radio"/> Push Notification	

Connectors

☐ Send Fax




[Next >>](#) [Cancel](#)

Multiple actions can be added




For example:

- Adding a follow up call back/event on a calendar
- Send an email to the customer from a template
- Add comment to the record
- Click Next >> when done




"Then" Resulting Action(s)

Add Call Back/Event   


Event Name:
Type: Phone Follow Up
Location:
Start Time: 6 days from now
End Time: 6 days from now
Phone:
Attendees: Logged in User

Send Email   

To: Primary Contact
From Name:
From Address: test@gmail.com
Cc:
Bcc:
Send From Assigned Group: No
Send From Assigned Acct Mgr: No
Send From Assigned Partner: No
Send From Assigned Partner Rep: No
Send From Logged in User: No
Format: plain
Email Message Template: test

Add Sales Rep Comments/Notes   

Sales Rep Comments/Notes : adding comment



[Close](#)

Creating Resulting Actions

Resulting actions are easy to follow and review once completed.

The standard LeadMaster functionality applies.

Required fields ★ are noted.

Click **Save** when complete.

Edit Action - Add Call Back/Event

[Help Guide](#)

Type

Event Name

Location

★ Start Time ☒ all day

★ End Time

Phone

Reminder

Group List
Assigned Acct Mgr
Assigned Partner
Assigned Partner Rep
Administrator
Andy B5
test Characters
Acct Mgr

Group List Attendees
Logged in User

>>
<<

Save **Cancel**

A completed workflow

The three steps are completed in this example:
When a record is updated

IF the record has a Lead Status of New Inquiry AND the campaign is CP-1018

A call back will be created in 6 days for the logged in user,
an email is sent to the primary contact AND a comment is placed on the record.

The screenshot displays the 'Edit Business Rule' interface. At the top, there are tabs for 'Business Rules List' and 'Help Guide'. Below these, the 'Business Rule Name' is set to 'Sample Workflow'. The 'Rule Applies When' dropdown is set to 'Updating an existing record'. The main configuration area is divided into two columns: 'If Condition Evaluated' and 'Then Resulting Action(s)'. The 'If Condition Evaluated' column contains the condition 'LeadStatus = 'New Inquiry' AND Campaign = 'CP-1018''. The 'Then Resulting Action(s)' column contains three actions: 'Add Call Back/Event', 'Send Email', and 'Add Sales Rep Comments/Notes'. Each action is detailed with its specific parameters. The 'Add Call Back/Event' action includes fields for Event Name, Type, Location, Start Time, End Time, and Phone. The 'Send Email' action includes fields for To, From Name, From Address, Cc, Bcc, Send From, Format, and Email Message Template. The 'Add Sales Rep Comments/Notes' action includes a field for Sales Rep Comments/Notes. A 'Close' button is located at the bottom right of the interface.









































"If" Condition Evaluated	"Then" Resulting Action(s)	Reorder Action(s)
LeadStatus = 'New Inquiry' AND Campaign = 'CP-1018'	Add Call Back/Event Event Name: Type: Phone Follow Up Location: Start Time: 6 days from now End Time: 6 days from now Phone: Attendees: Logged in User	⬆ ⬇ ⬆
	Send Email To: Primary Contact From Name: From Address: test@gmail.com Cc: Bcc: Send From Assigned Group: No Send From Assigned Acct Mgr: No Send From Assigned Partner: No Send From Assigned Partner Rep: No Send From Logged in User: No Format: plain Email Message Template: test	⬆ ⬇ ⬆
	Add Sales Rep Comments/Notes Sales Rep Comments/Notes : adding comment	⬆ ⬇ ⬆

Multiple actions executed behind the scenes with one record update, saving time for end users.

Business Rule List

Here's an example workflow list. It is important to note that **the system will execute the workflow in order top to bottom.**

Workflow can be dragged and dropped to change the order of execution. 

Marketing Automation / Business Rules - List					
Add New Rule Help Guide					
Priority	No.	Business Rule	Applies When	Last Updated	
✦	4113	test 2818	Updating an existing record	5/23/2019 1:03:31 PM -	   
✦	18	test rr	Adding a new record	4/13/2020 2:26:34 PM -	   
✦	3327	Rest SQ Test	Updating an existing record	4/13/2020 2:26:36 PM -	   
✦	2155	Did not reach CB 1 day	Updating an existing record	8/17/2015 10:06:19 AM	   
✦	14	Initial Prospecting	Updating an existing record	8/17/2015 10:06:18 AM	   
✦	15	No Interest	Updating an existing record	8/17/2015 10:06:17 AM	   
✦	16	On hold	Updating an existing record	4/13/2020 2:26:37 PM -	   
✦	17	Closed / Won	Updating an existing record	4/13/2020 2:26:37 PM -	   
✦	19	Intro Letter	Updating an existing record	8/17/2015 10:06:11 AM	   
✦	20	test	Updating an existing record	8/17/2015 10:06:09 AM	   

****Skip to** is a workflow resulting action that can be utilized to avoid having one workflow over writing your resulting action.

Existing workflow options

Options to edit existing workflow are:



- Pause – the workflow will be paused from execution but remains in place.



- Edit – edit conditions or actions



- Clone – will copy an existing workflow (note: they are paused initially and will need to be resumed)



- Delete – removes workflow completely



- Active – workflow is active and will execute if conditions are met

Helpful hints

- Workflow automation looks intimidating but break it down to When, If and Then.
- Test, test and test again.
- It can be helpful to use a flowchart to diagram your process flow.
- Did we mention to test?

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