Business Rules, Workflow and Marketing Automation

How to create automatic rules for your CRM

CRM Solutions
by LeadMaster

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.

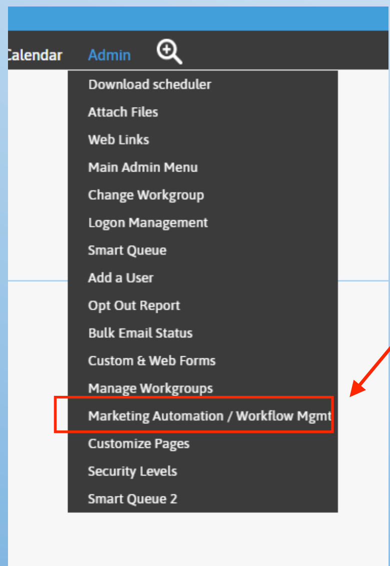
Benefits of workflow automation!

- 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.

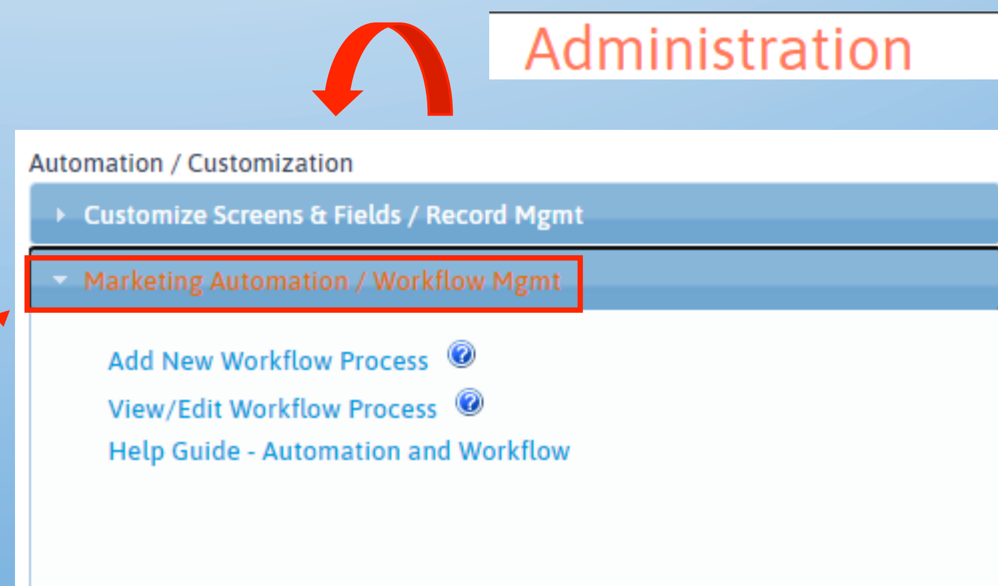
Who can create a Business Rule or Automation?

- 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

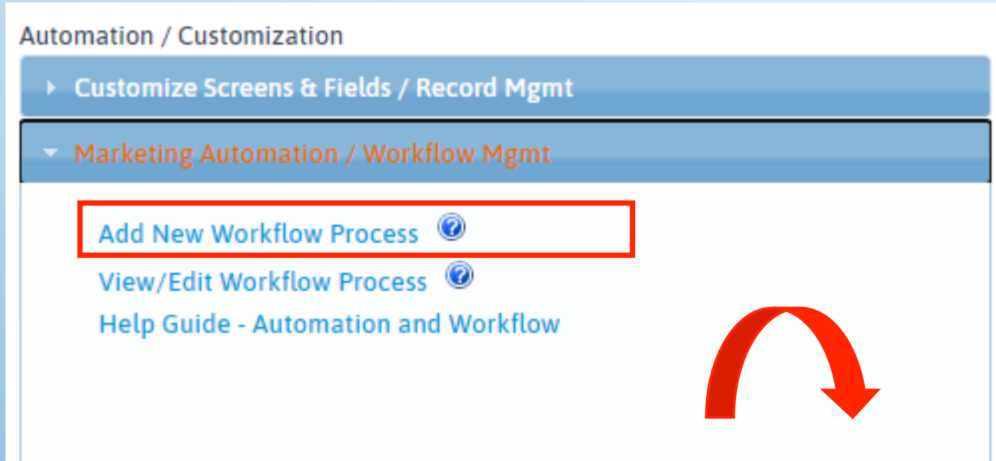


Marketing Automation/Workflow Mgmt may be located in the Admin dropdown

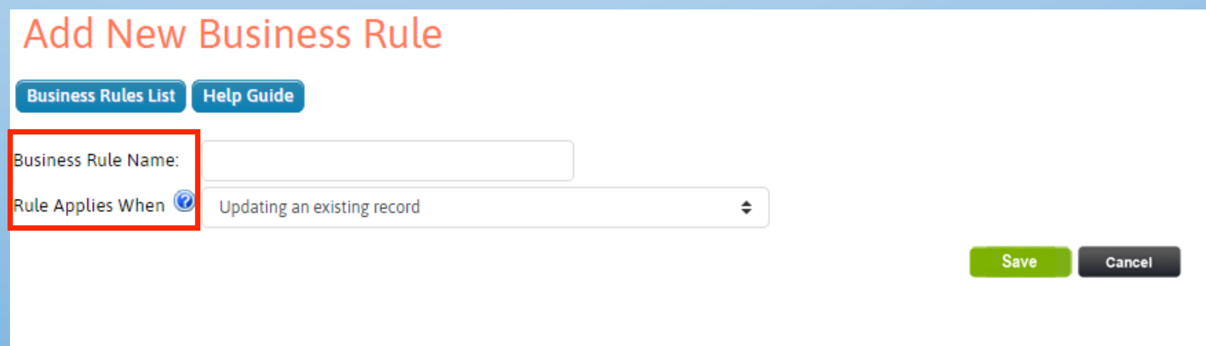


Or via the main admin page:
Administration area>>
Automation/Customization section>>
Marketing Automation/Workflow Mgmt

Adding New Workflow



Select Add New Workflow Process



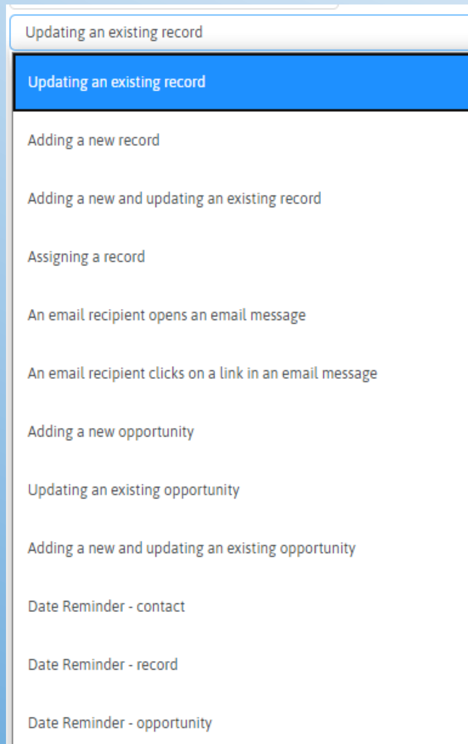
Business Rule Name: Provide the name of the workflow.

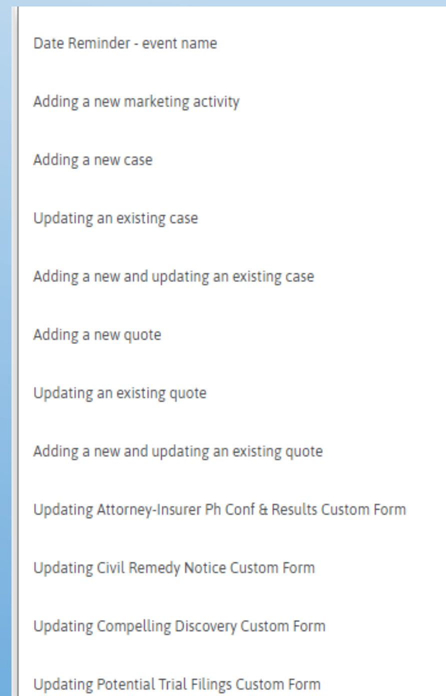
Helpful tip: make the name relevant

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

Click 

Adding New Workflow





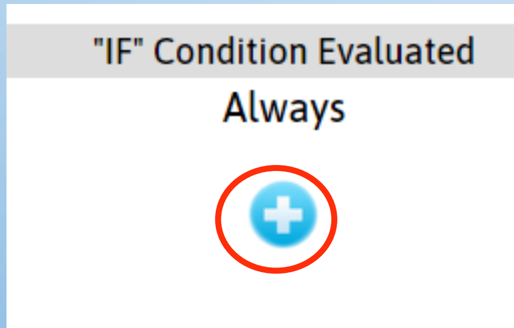
This list is a sample of the options for when a workflow can be triggered.

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

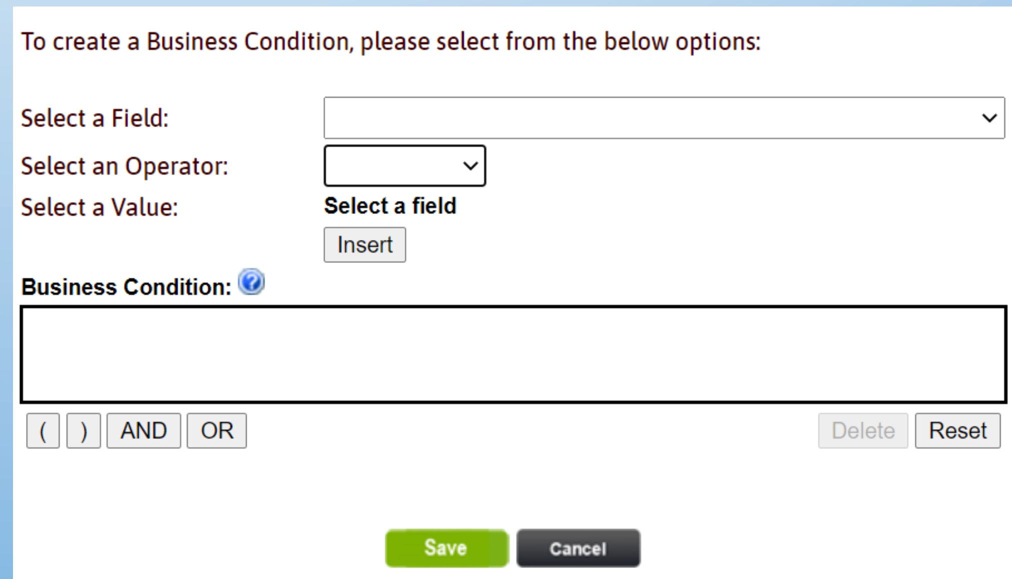
There are many options; its important to understand your end goal.

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 Insert
Save when complete.

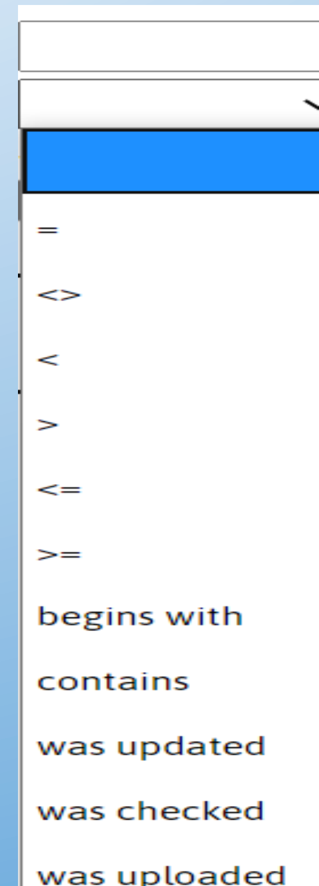


Note: You can add several conditions with and/or statements. We will discuss this in greater detail later.

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 <u>start</u> 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.

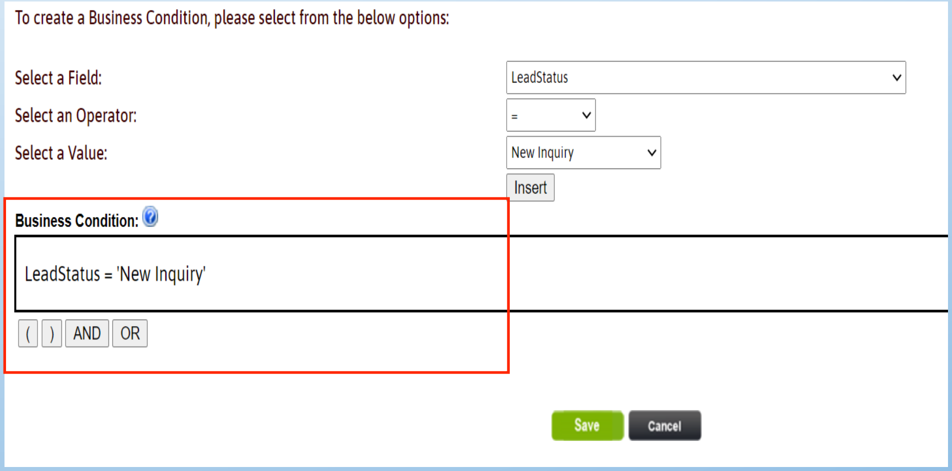


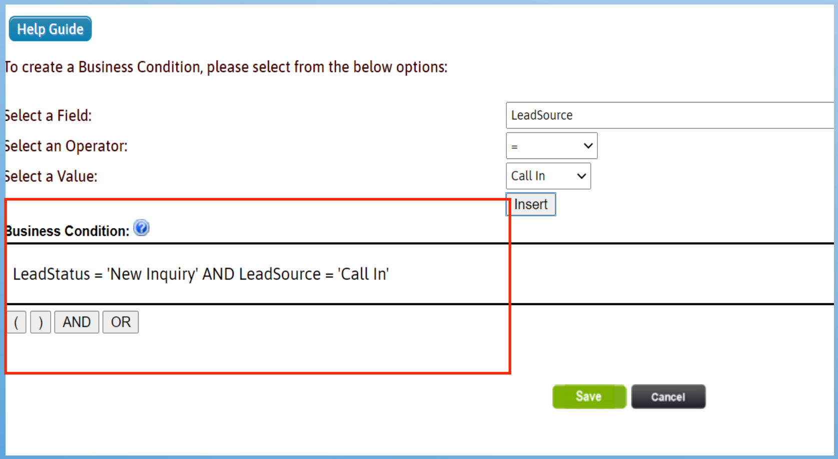
Note: Not all operators are available for all conditions. For example date fields do not have the option 'was checked'.

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)





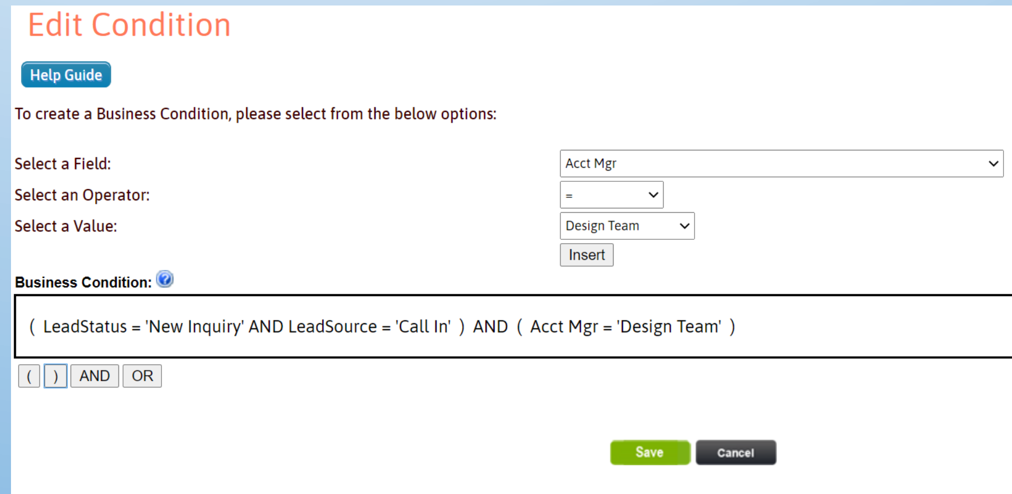
You can further define your condition with the use of AND/OR

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.

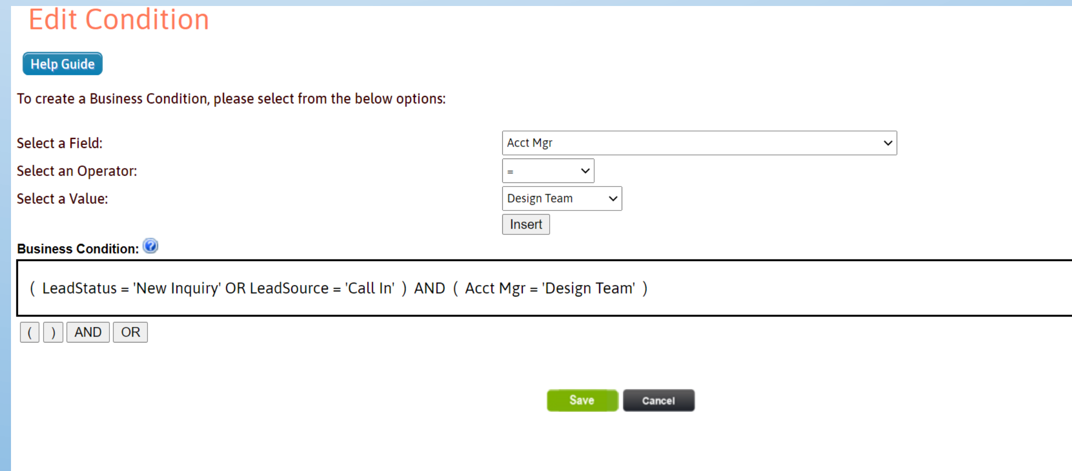


Complex Conditions

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

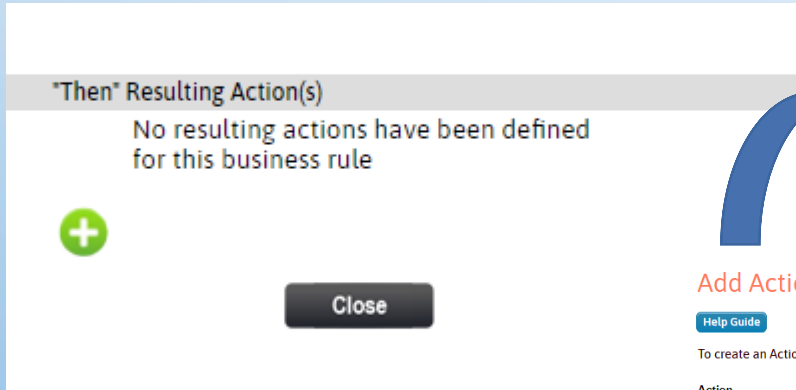
This workflow will execute on the rule when the Lead Status OR lead source AND Acct Mgr have the values specified.

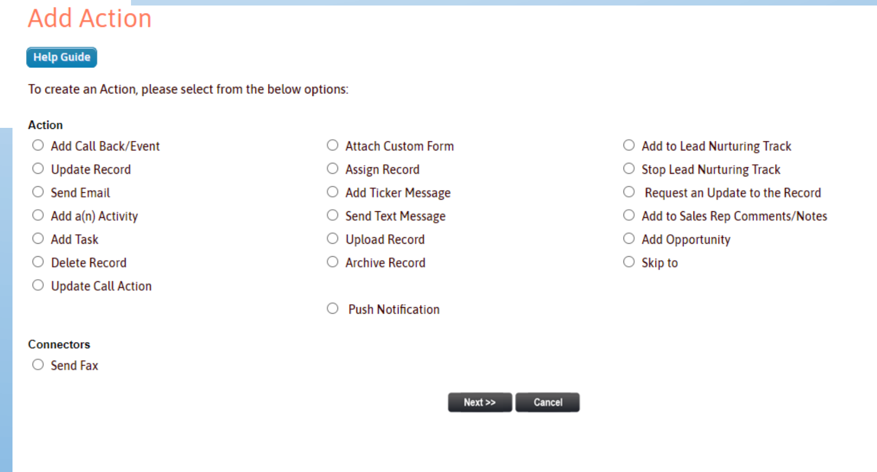
Keep in mind that the Open and Close condition be satisfied before the AND is added to the equation.



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

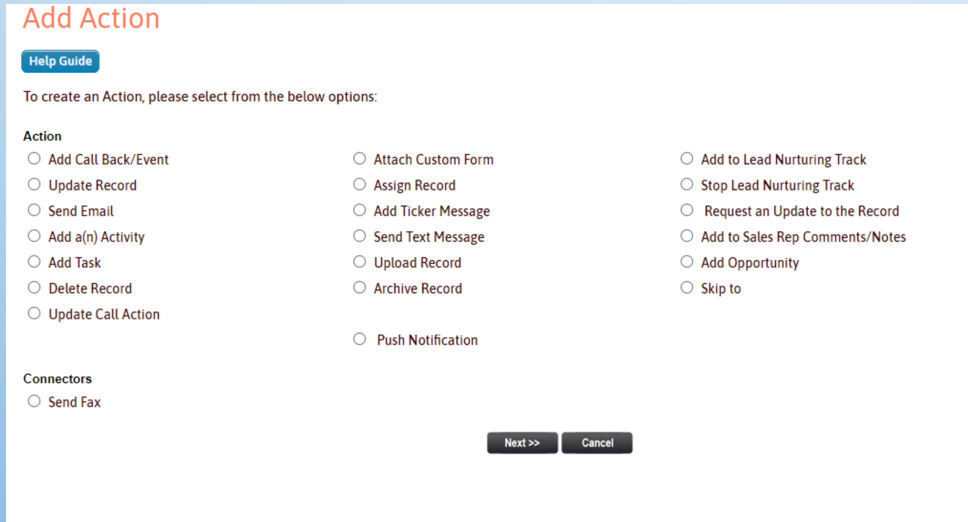
Creating Resulting Actions





Click to display options
For resulting action

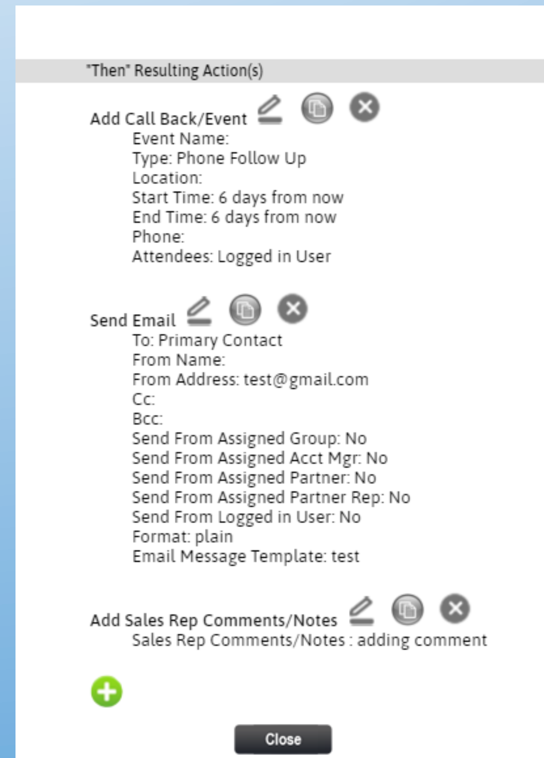
Creating Resulting Actions



Multiple actions can be added

For example:

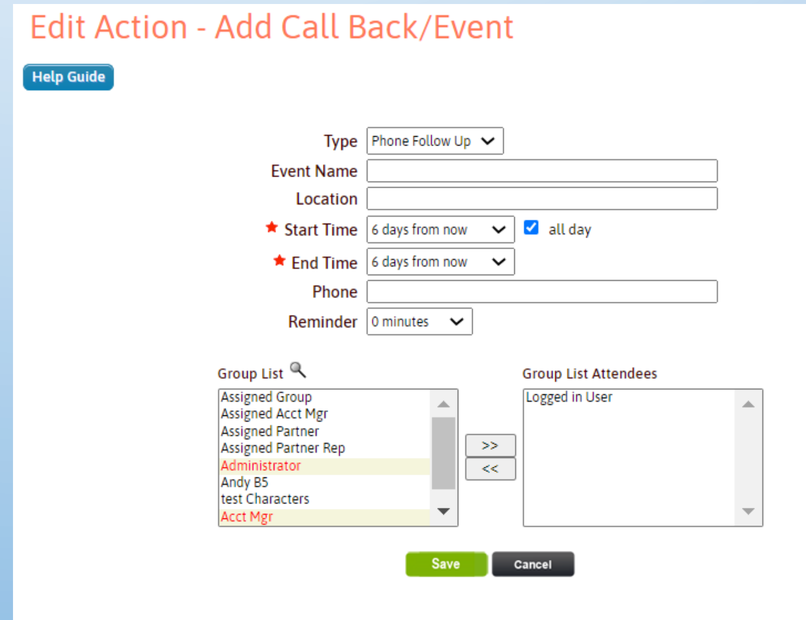
- Adding a follow up call back/event on a calendar
- Send an email to the customer from a template
- Add comment to the record
- Click Next >> when done



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.

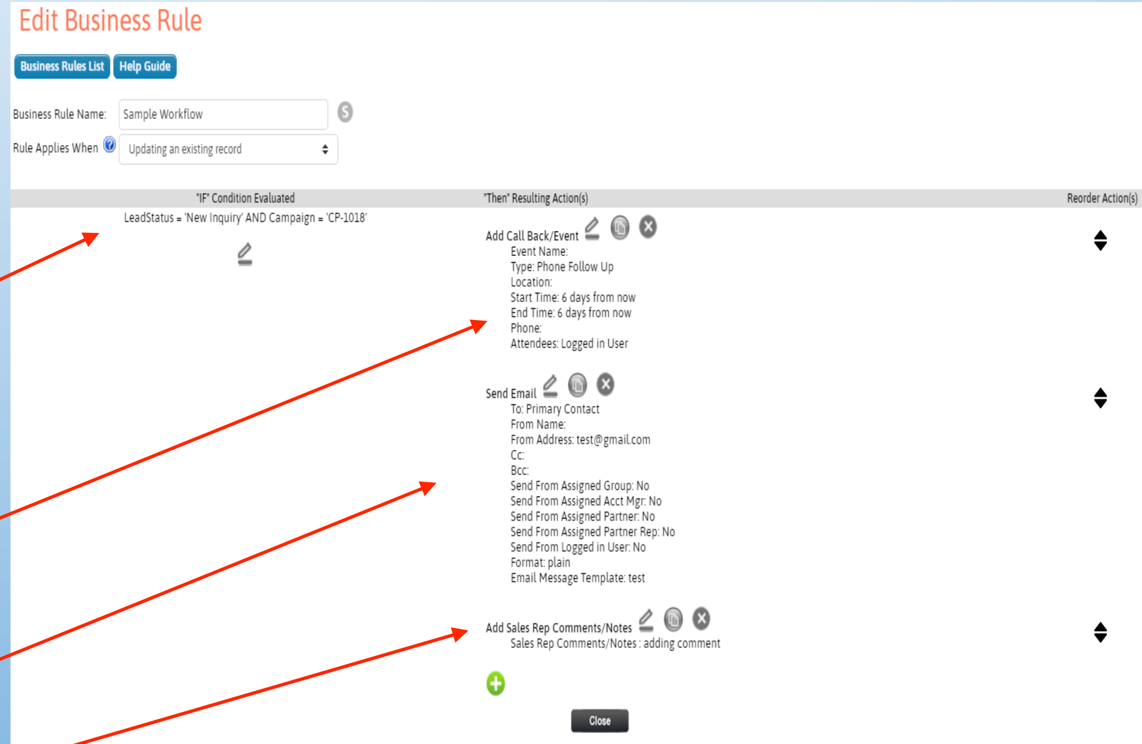


A completed workflow

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.



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.

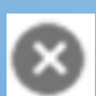
Existing workflow options

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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