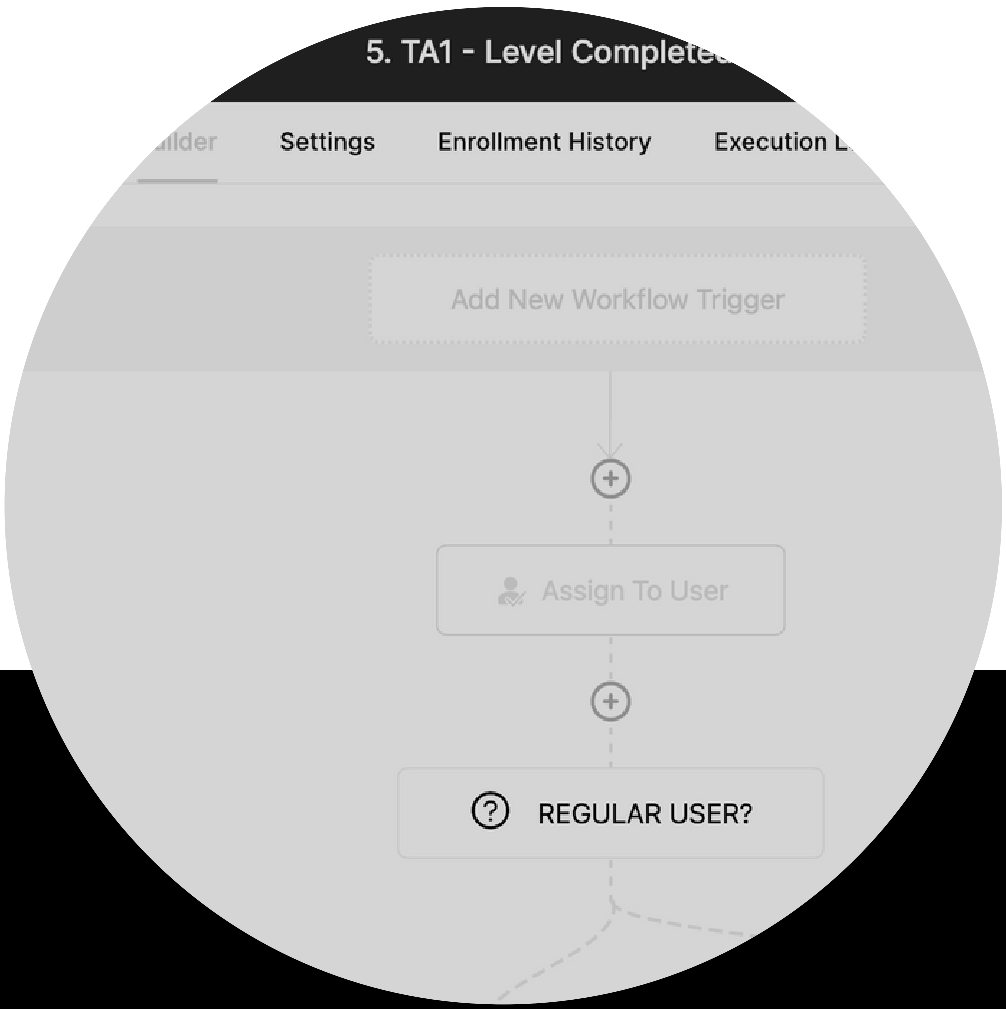
AUTOMATE YOUR WORKFLOWS



July 2023

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01

INTRODUCTION

Each workflow you create will have several settings & configurations you are able to customize. As well as details logs to help you track your steps & troubleshoot

Trigger — A behavior or setting used to fire off a workflow

Actions — The automatic steps the software will perform when your workflow is fired off

Actions — Add the actions you would want an employee or other system to perform...even add comments, copy, move, or delete steps

Settings — Configure your flow settings including sending time, subject, from address, and more

Execution Logs — View every step executed in chronological order for all contacts

Enrollment History — View each contact in your flow & what step they are currently on, next execution, etc

02

TERMINOLOGY

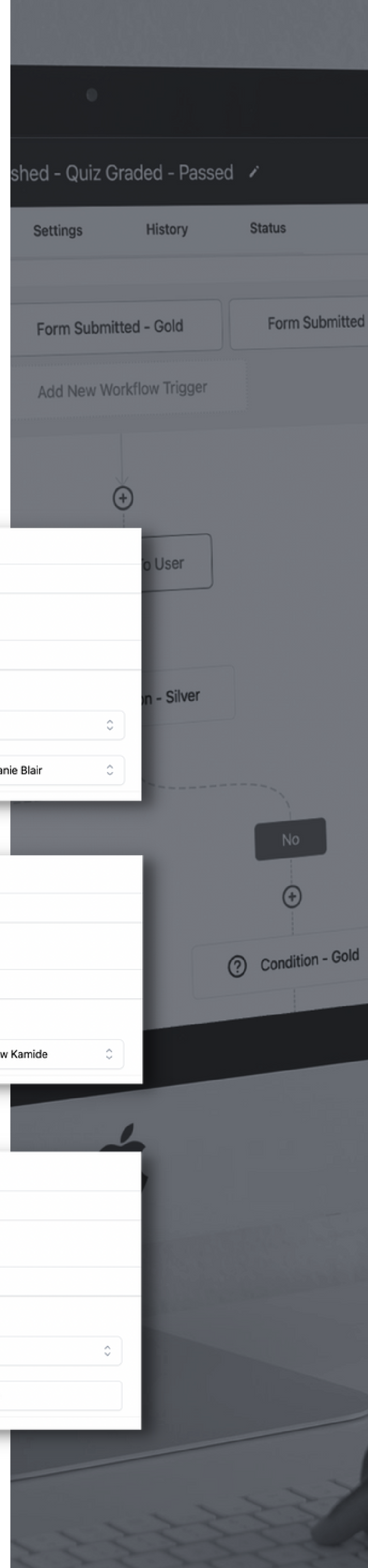
COMMON WORDS & PHRASES USED AROUND THE PLATFORM THAT OFTEN NEED MORE CLARIFICATION

Term	Description
Custom Field	A field that captures information about the contact individually
Custom Value	A predetermined field for your account that can be pulled into messaging such as an unsubscribe link
Allow Re-entry	If turned on under settings, this will allow a single contact to go through the workflow more than once
DND	Do Not Disturb - If this is on, no mass communications will go through to the customer.
Premium Triggers & Actions	Premium Triggers & Actions are advanced options available in the Workflow builder that allow you to connect to an external system or software and execute complex actions within a workflow that were not possible before.
Opportunity	A contact card in a pipeline stage - Your "opportunity" to make a sale
Pipeline	A process that a lead is in Ex. Sales Process Pipeline ----Suspect - Lead - Appointment Booked - Appointment Held - Sold
Product	One membership course
Offer	The payment set-up of one or more courses. An offer can have one product in it or you can bundle multiple products together for a certain offered price. You can have multiple offers with a variety of products within them.
User	A team member - Add users under Settings → Team Management
Assigned User	The user that a lead/client is assigned to. • Customers could be assigned to the user that works with the clients • Leads could be assigned to the user that works in sales Whomever the contact is assigned to is whom bulk communications look like they come from. • If a contact is assigned to User A, any mass communications will deliver to the contact as User A.
{{ }}	Words using these brackets are custom fields or custom values that can be used in the system. When associated with a contact, it will pull in that information. Ex. {{contact.name}} will pull in their full name
( )	Words using these brackets in examples are where you would write in your information. Ex. (event name) would be where you would input your event's name

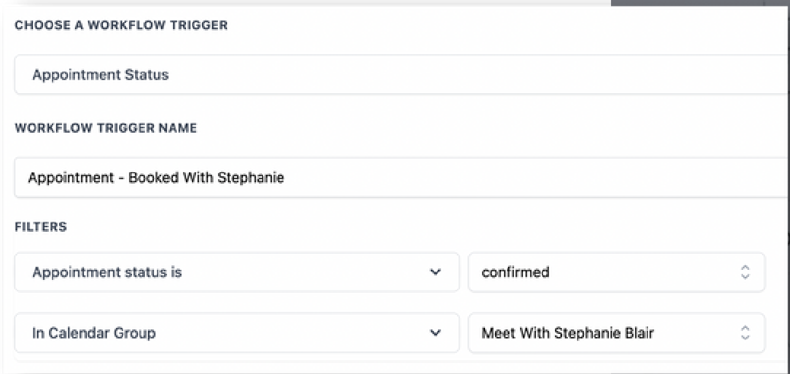
03

TRIGGERS

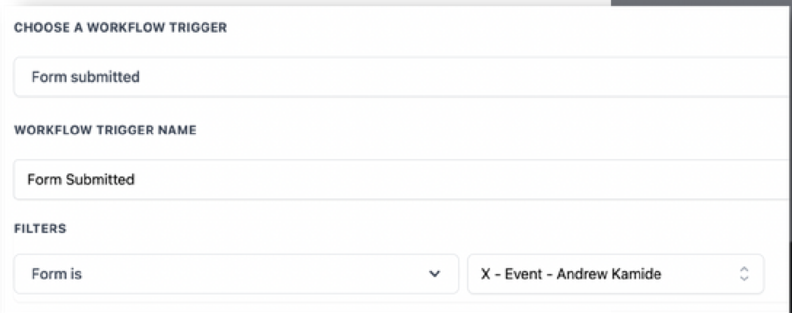
Each workflow you create will have something that fires it off including bulk actions, other workflows, and most importantly...triggers! Customize your triggers to specify who is added.



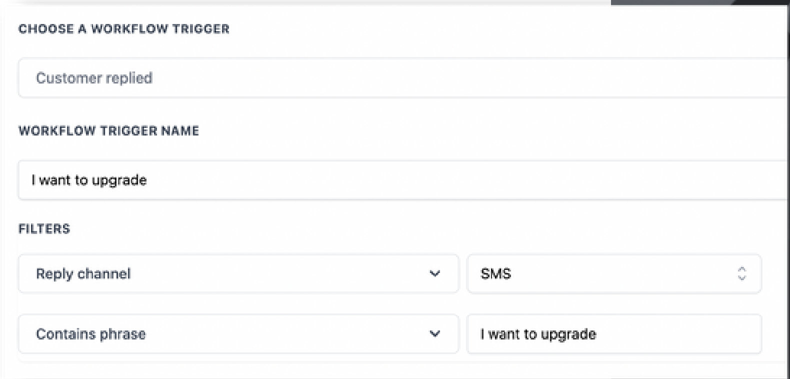
Appointment



Lead Gen



Events



TRIGGERS

THESE ARE THE FILTERS USED FIRE OFF YOUR WORKFLOW FOR A CONTACT

Trigger	Description	Common Filters	Tips
Affiliate Created	Runs when an affiliate is added to your affiliate list		
Appointment Status	Runs on appointment status updates	Event Type, In Calendar, Appointment Status	Suggested for all appointment triggers, runs if manually booked and/or if the customer booked
Customer Booked Appointment	Runs when the customer booked an appointment themselves		Will not run on manually booked appointments, ONLY ones the customer booked
Birthday Reminder	Runs on customer's birthday	After/ Before no. of Days	With Before 0 Days, it will fire whatever action you choose on the day of their birthday
Contact Changed	Runs when information in a contact record of your choice has changed	Assigned User, DND, etc.	
Contact Created	Runs when you have created a contact	Has tag	
Contact DND	Runs when a contact's DND flag is changed	DND Flag is	
Contact Tag	Runs when tags are added or removed	Tag is Added or Removed	
Custom Date Reminder	Runs on a custom date		
Note Added	Runs when a note is added to a contact		
Note Changed	Runs when a note is changed in a contact		
Task Added	Runs when a task is added to a contact	Assigned user	
Task Reminder	Reminds tasks are due	Before # of days	
Customer Replied	Runs when a contact responded		Common filters are used for a text keyword example, filters may very depending on what you want to accomplish

TRIGGERS

THESE ARE THE FILTERS USED FIRE OFF YOUR WORKFLOW FOR A CONTACT

Trigger	Description	Common Filters	Tips
Form Submitted	Runs when a form is submitted	Form Is, Specific custom field answer	To trigger on a specific answer, use a checkbox custom field and add a filter of that custom field and the answer you want to trigger off of
Order Form Submission	Runs when a one or two-step order form is submitted	In funnel/website, Page, Submission type, Product (if needed)	Use submission type "sale" for firing off of a purchase... use "optin" to fire if someone only fills out the first step of a two step order form
Order Submitted	Runs when a product is purchased anywhere in the system	Global Product, Order Source	
Survey Submitted	Runs when a survey is submitted	Survey Is, Disqualification	Similar to Form Submitted
Trigger Link Clicked	Runs when your trigger link is clicked	Trigger link is	
Twilio Validation Error	Runs based on the Twilio Lookup Response before sending an SMS or making a call	Error is	Twillio does charge for each lookup
Call Status	Runs on outbound and inbound calls	Call Status, Direction	
Email Events	Runs on specific email events		Only works if you are on mailgun SMTP
Category Completed	Runs when a category is marked as complete	Select Product, Category	
Category Started	Runs when a contact begins a product category	Select Product, Category	
Lesson Started	Runs when a contact begins a product lesson	Select Product, Category, Lesson	
Lesson Completed	Runs when a contact marks a product lesson as complete	Select Product, Category, Lesson	

TRIGGERS

THESE ARE THE FILTERS USED FIRE OFF YOUR WORKFLOW FOR A CONTACT

Trigger	Description	Common Filters	Tips
Membership New Sign Up	Runs when a BRAND NEW customer/lead subscribed for membership	Select Offer	If you do not select an offer, the trigger will run on every sign-up into any offer, specification is optional
Offer Access Granted	Runs when access to offer is granted	Select Offer	This runs when you give a contact access to a membership offer
Offer Access Removed	Runs, when access to offer is removed	Select Offer	This runs when you remove a contacts access to a membership offer
Product Access Granted	Runs when access to the product is granted	Select Product	This runs when you give a contact access to a membership product
Product Access Removed	Runs when access to the product is removed	Select Product	This runs when you remove a contacts access to a membership product
Product Started	Runs when a contact begins a specific product	Select Product	This runs when a contact has started a membership product
Product Completed	Runs when product gets completed	Select Product	This runs when a contact has marked all posts in a membership product as complete
User Login	Runs when the user logs into membership		Track how many times someone logs in…or if they don't remind them!
Opportunity Status Changed	Runs when the opportunity status gets changed or updated	Select Pipeline & Status	Use this trigger to fire your flow when a contact's pipeline status changes from open to won
Pipeline Stage Changed	Runs when the pipeline stage was updated for an opportunity	Select Pipeline & Stage	Use this trigger to fire your flow when a contact's pipeline stage changes from column 1 to column 2
Stale Opportunities	Runs when opportunities older than the given time duration	Select Pipeline, Stage, Duration	Use this trigger to fire your flow when a contact is sitting in a certain stage for x number of days

TRIGGERS

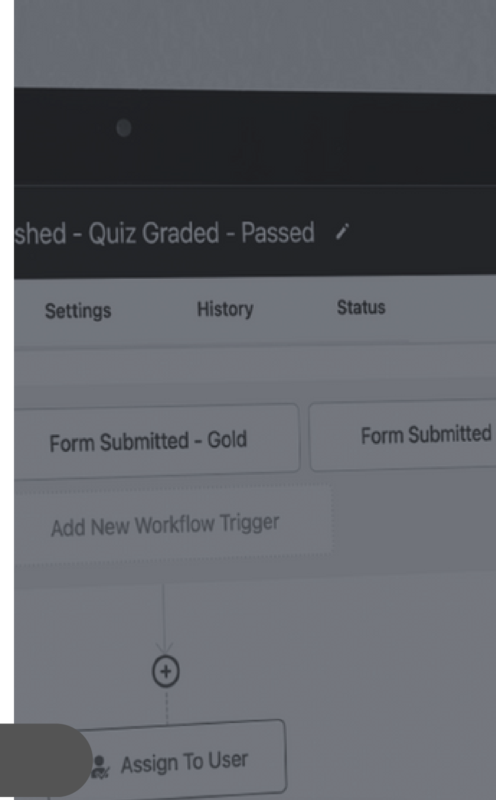
THESE ARE THE FILTERS USED FIRE OFF YOUR WORKFLOW FOR A CONTACT

Trigger	Description	Common Filters	Tips
Inbound Webhook	Runs when you to receive data (like contacts, appointments, opportunities, etc.) from other systems.	Premium Triggers (PAY PER USE)	Use this to fire off of other systems
Invoice	Runs when an invoice is created or updated	Invoice Status	Run when it is sent or paid
Payment Received	Runs when a successful or failed payment is collected	Global Product, Status	
Video Tracking	Runs when a contact has reached a certain "watched until" point on a video from a funnel or site		Must be natively hosted
Abandoned Checkout	Runs when a customer adds a product to Shopify cart but does not complete checkout	Duration	
Order Placed	Runs when a customer places a Shopify order	Cart value	
Order Fulfilled	Runs when the Shopify order is fulfilled or processed	Cart value	
Facebook Lead Form Submitted	Runs when a lead submits your Facebook form	In form	
Tik Tok Form Submitted	Runs when a lead submits your Tik Tok video or profile form	In form	

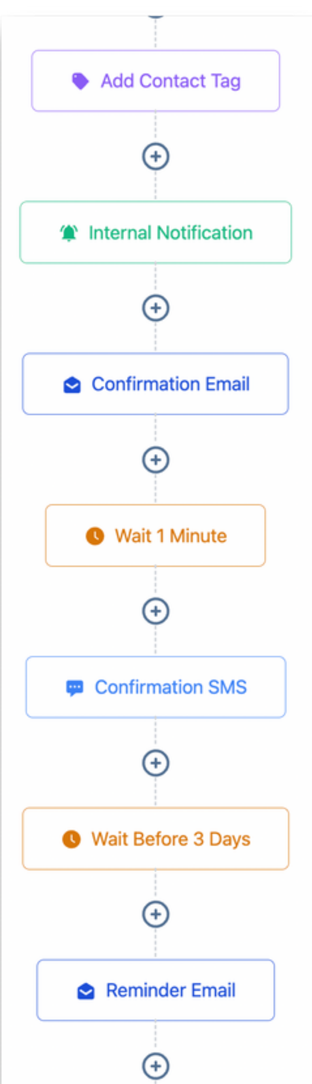
04

ACTIONS

Each workflow you create will have specific steps you customize in order to determine what the workflow does when it is fired off. This includes messaging, automation, system updating, etc

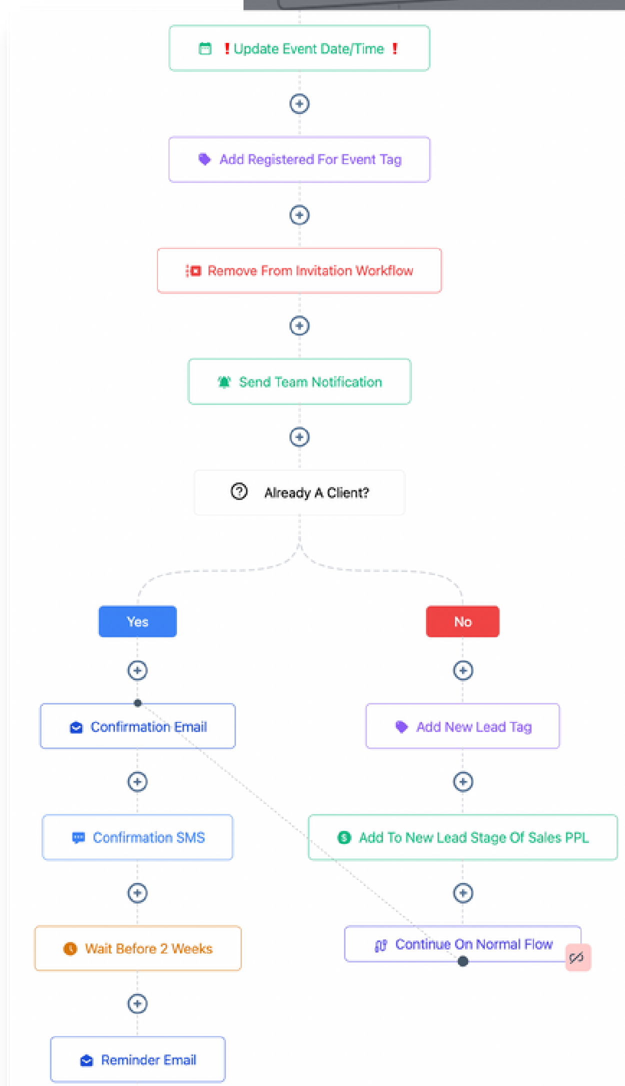


Appointment



Lead Gen

Events



ACTIONS

THESE ARE WHAT THE SYSTEM DOES WHEN THIS WORKFLOW FIRES – WHAT YOU MAKE IT DO

Trigger	Description	Tips	Example
Premium – Google Sheets	This is similar to the Google Sheets action in Zapier. It allows you to send data from your CRM to Google Sheets.		If someone fills out my form, then send the data to a Google Sheet
Premium – Slack	Allows you to notify your internal teams on slack when certain events happen inside your CRM.		If someone submits my support ticket form, then send an notification to my Slack team
Premium – Custom Webhook	Allows you to make API calls from your workflow to any other system. This allows you greater control over sending data out from your CRM to any other platform.		If someone completes my membership product, then send a webhook to Sertifier to send their certificate
Premium – Date/Time Formatter	Allows you to transfer text to a date, specific format, and time		If someone texts us back with their birthday, then format it into a date
Premium – Number Formatter	Allows you to transfer text to number, format number, format phone, format currency, & random number		If I ask for someone's phone number and they respond, then format the message for their phone field
Premium – ChatGPT	Integrates seamlessly with your CRM, responding intelligently to various triggers and actions to streamline your workflows		If 'Customer Booked Appointment" is triggered, then a Workflow AI-generated confirmation message will send
Send Email	Send an email to the contact in the workflow	To contact	If someone books an appointment, then send them an email confirmation
Send SMS	Send a text to the contact in the workflow	To contact	If someone books an appointment, then send them a text confirmation
Call	An automatic call that goes through to you, tells you the prompt you entered in, and then connects you with that contact	To contact	If someone fills out a form that makes them a lead, then call them to ask if they have any questions
Voicemail	Sends a audio file of your choice to the contacts voicemail	Will ring once or twice before hanging up and leaving the voicemail	If someone books an appointment, then send them a voicemail the day before reminding them

ACTIONS

THESE ARE WHAT THE SYSTEM DOES WHEN THIS WORKFLOW FIRES – WHAT YOU MAKE IT DO

Trigger	Description	Tips	Example
Messenger	Sends a Facebook Message to a contact		If someone FB messages me a keyword, then send a PM back with my appointment link
Instagram DM	Send an Instagram DM to the contact	To contact	If someone IG messages me a keyword, then send a DM back with my appointment link
Manual SMS	Sets up a pre-written SMS to be sent out manually by a user	Must manually send it via contacts → manual actions	If someone books an appointment and I have confirmed it, then setup a manual SMS for me to send out
Manual Call	Sets up a manual action for a user to call a contact	Must make the call manually via contacts → manual actions	If someone books an appointment and I have confirmed it, then setup a manual call for me to make
GMB Messaging	Sends a Google My Business message to a contact	To the client	If someone GMB messages me a keyword, then send a message back with my appointment link
Add To Affiliate Manager	Add the contact to your affiliate list		If a contact fills our affiliate application form, then add them to the affiliate manager
Update Affiliate	Edit or update that contact's affiliate profile	Active or Inactive	If they cancel as a client, then update their affiliate profile to inactive
Add To Affiliate Campaign	Add that contact's affiliate profile to a specified campaign	Select Affiliate Campaign	If a contact is tagged "x program affiliate", then add them to a specified affiliate campaign
Remove From Affiliate Campaign	Remove that contact's affiliate profile to a specified campaign	Select Affiliate Campaign	If a contact is DND'd, then remove them to a specified affiliate campaign
Add Contact Tag	Add a label/tag to a customer based on action taken		If they purchase my product, then tag them as an active client

ACTIONS

THESE ARE WHAT THE SYSTEM DOES WHEN THIS WORKFLOW FIRES – WHAT YOU MAKE IT DO

Trigger	Description	Tips	Example
Remove Contact Tag	Remove specified tag from a contact		If they unsubscribe from my newsletter, then remove the “newsletter list” tag
Create / Update opportunity	Move a customer within a pipeline or to a new pipeline	Use custom values in the opportunity name, source, & value	If they book an appointment, then move them from hot lead stage to appointment booked stage in my Sales Pipeline
Add to Notes	Make note of an action taken or any info in their contact record	Use custom fields to pull in info	If they fill out a form, then add their answers to their notes with custom fields
Assign to User	Assign a contact to a team member or yourself	Whoever the contact is assigned to is who the messages come from	If they become a customer, then assign them to the service user
Remove Assigned User	Un-assign a contact from a team member or yourself		If they cancel as a customer, then un-assign them from (user) since they are the customer service person and are no longer needed
Set Event Start Date	Set a date and time based on a specific date, recurring date, or custom field/value	Allows you to use before steps that are respective to the date you select	If they register for my event, then set the event start date to October 13th 12:00PM
Add To Workflow	Run a client on a specific workflow		If they answer “red” as their favorite color, then add them to the “red” nurture workflow
Remove From Workflow	Remove the contact from a specific workflow		If they fill out a form, then remove them from the workflow reminding them to fill it out
Remove From All Workflows	Remove the contact from all workflows that they are actively on		If they are DND’d, then remove from all workflows

ACTIONS

THESE ARE WHAT THE SYSTEM DOES WHEN THIS WORKFLOW FIRES – WHAT YOU MAKE IT DO

Trigger	Description	Tips	Example
Remove Opportunity	Remove a contact from an opportunity pipeline		If they cancel as a client, then remove them from the client onboarding pipeline
Send Internal Notification	Send a specific email/sms/or mobile app notification to a specific person	Used to send messages to other team members or custom email/phone number	If someone books an appointment, then send me an email notification
Set Contact DND	Flag a client as DND or disable DND	Specify DND Type	If a client unsubscribes or complains on an email, then enable DND
Edit Conversation	Mark a conversation as read, unread, archive, or unarchive		If a client responds to my email, then mark the conversation as read
Send Review Request	Sends an Email or SMS review request	Pulls from settings – reputation	If a client has been a client for 6 months, then send a review request
Update Appointment Status	Set an appointment status as confirmed, invalid, cancelled, no-show, or showed		If their custom field "appointments remaining" is less than 1, then update their appointment status to cancelled
Add Task	Assign yourself or a team member a task for a client		If they are a stale opportunity in a pipeline for too long, then assign (user) a task to follow up with them
AI Appointment Booking Bot	Add contact to AI Bot flow for appointment booking. The bot will converse with the user and try to book the appointment on the selected calendar		If the lead chats in asking to book an appointment outside of my work hours, then have the booking bot help them pick a date & time
Send To Eliza Agent Platform	Once this action is configured, all the contacts will be delivered to Eliza for conversation.	Contact CSPRO team before using	If the lead chats in outside of our hours", then send them to the Eliza Agent platform to continue the conversation

ACTIONS

THESE ARE WHAT THE SYSTEM DOES WHEN THIS WORKFLOW FIRES – WHAT YOU MAKE IT DO

Trigger	Description	Tips	Example
Add To Google Analytics	Attribute actions to a Google ad conversion		If someone calls my number, then add that conversion to Google Adwords
Add To Google Adword	Sends data from forms, surveys, and calls to Google Analytics	Must know tracking ID, category, action, label, and value	If someone fills out a form, then push that data to Google Analytics
Update Contact Field	Will update any contact or custom field of your choice automatically	Will set this field as the same value every time for every contact	If they sign up for my program using John's affiliate link, then update my "Affiliate" custom field with John's name
Facebook – Add To Custom Audience	Adds a contact to a FB audience	Must select ad account that has an audience to choose from	If someone fills out a Facebook Lead Form on my FB ad, then add them to a certain FB audience
Facebook – Remove From Custom Audience	Removes a contact from a FB audience	Must select ad account that has an audience to choose from	If someone purchased from my FB ad, then remove them from the FB audience they are in
Facebook – Conversion API	Sends data directly back to Facebook from CSP	Need Facebook pixel information	If someone purchases, then send that conversion data to Facebook
Update Custom Value	Allows you to update an account custom value		If someone registers for my event, then update the custom value for total
Membership Grant Offer	Will allow a customer to access an offer		If they sign on as a client, then grant them access to the onboarding offer
Membership Revoke Offer	Will remove customer access to an offer	Will remove all products within the offer	If someone signs up for a 7-day free trial of an offer, then wait 7 days and revoke the offer

05

OPERATION STEPS

Each workflow you create will have specific steps you customize in order to determine what the workflow does when it is fired off. This includes messaging, automation, system updating, etc

If Else Branches

Create branches in the flow based off of a set condition of your choice

Wait Steps

Holds a contact on the step until a certain time or condition is met

Webhooks

Used to send contact record data, appointment information, and more to other platforms

Go To

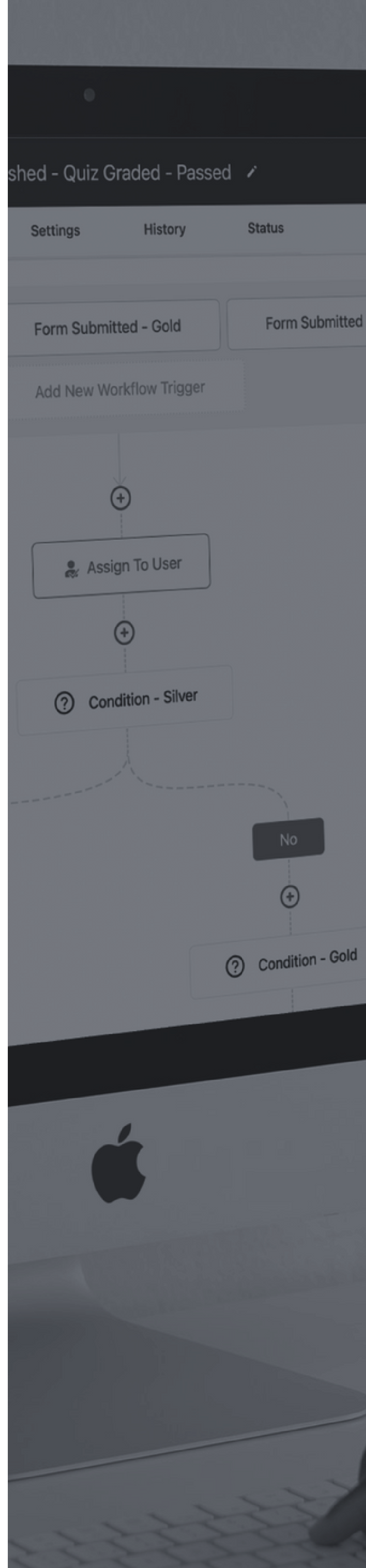
Connects one step of your flow to another

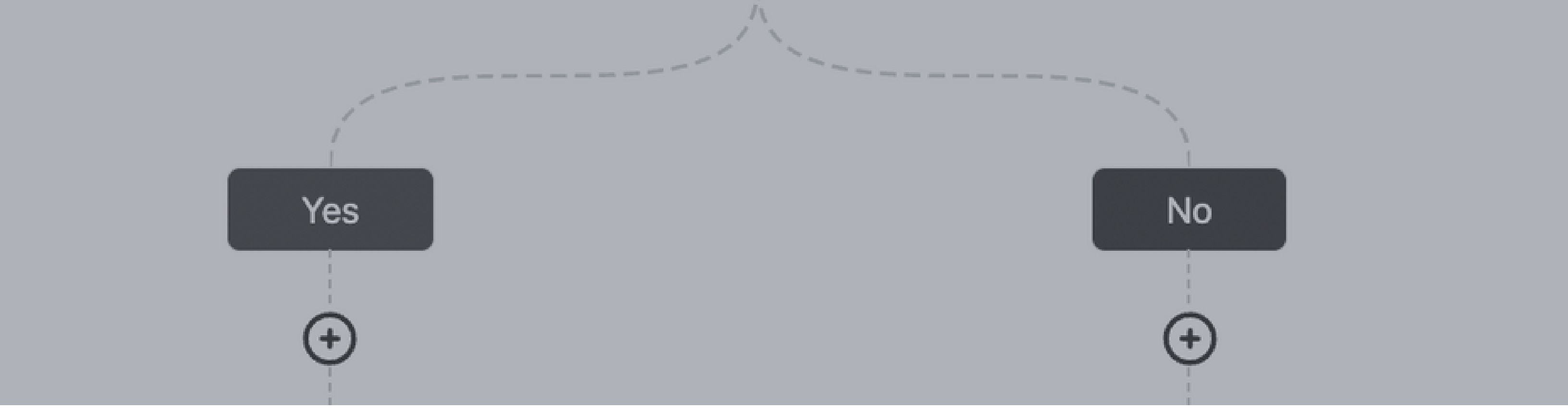
Math Operations

Update an existing field by adding, subtracting, multiplying, etc

Goal Event

Skip to the goal event step when a specified action is performed by the contact





IF ELSE BRANCHES

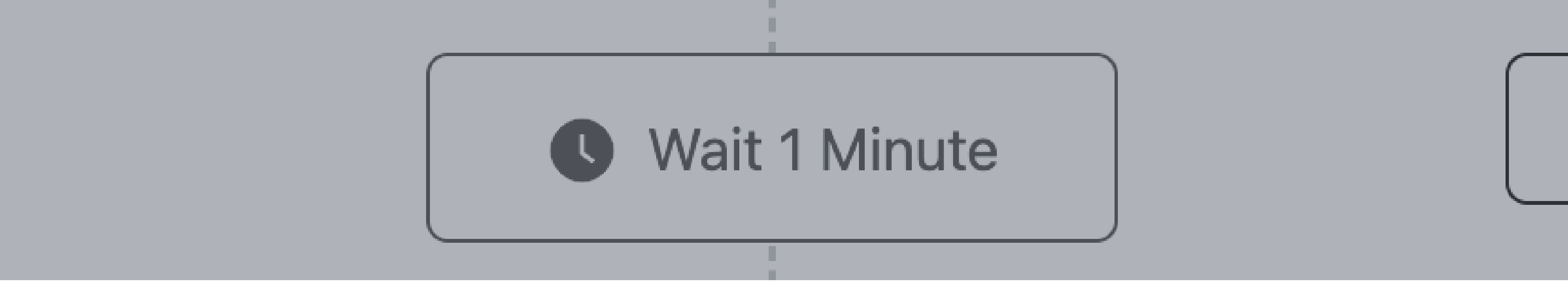
CREATE BRANCHES IN THE FLOW BASED OFF OF A SET CONDITION OF YOUR CHOICE

Event	Description	Notes
Contact Details	Split a workflow based on if their contact details include specific information of your choosing like tags, email, custom field answers, etc.	
Custom Value	Split a workflow based on the data in a specific account custom value	
Date Time	Split a workflow based on if the contact is entering that step at a certain date/time/day of your choosing.	
Events	Split a workflow based on if the contact clicked a specific trigger link or opened a certain email	Must use wait for trigger link click or wait for email event steps. You can also use timeout.
Workflow Contact	Split a workflow based on if the contact is active or not in another workflow	
Workflow Trigger	Split a workflow based on the workflow trigger that added them to the workflow	
AI Bot	Split a workflow based on if the AI Bot performed a specific action like booking an appointment.	Must use AI bot action prior to this branch
Contact Reply	Split a workflow based on if a contact has replied with a certain answer, intent type, and more.	Must use send SMS & wait for reply/time actions prior to this branch

IF ELSE BRANCHES

CREATE BRANCHES IN THE FLOW BASED OFF OF A SET CONDITION OF YOUR CHOICE

Event	Description	Notes
Date/Time Formatter	Split a workflow based on a date/time field formatted	Must use date/time formatter action prior to this branch
Google Sheets Lookup	Split a workflow based on the contact's activity in a Google sheet	Must use Google Sheets action prior to this branch
Inbound Webhook Trigger	Split a workflow based on the webhook that added them	
Invoice	Split a workflow based on invoice due date, status, total price, etc.	
Membership	Split a workflow based on membership activity	Must use a Membership trigger
Note Description	Split a workflow based on the description within the notes field	Must use add note action prior to this branch
Number Formatter	Split a workflow based on a number field formatted	Must use number formatter action prior to this branch
Opportunities	Split a workflow based on where the contact is within a specific pipeline	Must use an Opportunity trigger
Order	Split a workflow based on order details	Must use an Order Submitted trigger
Payment	Split a workflow based on payment status	Must use a Payment Received trigger
Shopify	Split a workflow based on an abandoned cart or if an order is placed in your Shopify WordPress site	
Video Tracking	Split a workflow based on how far someone watched a video on your landing page	Must use a Video Tracking trigger



WAIT STEPS

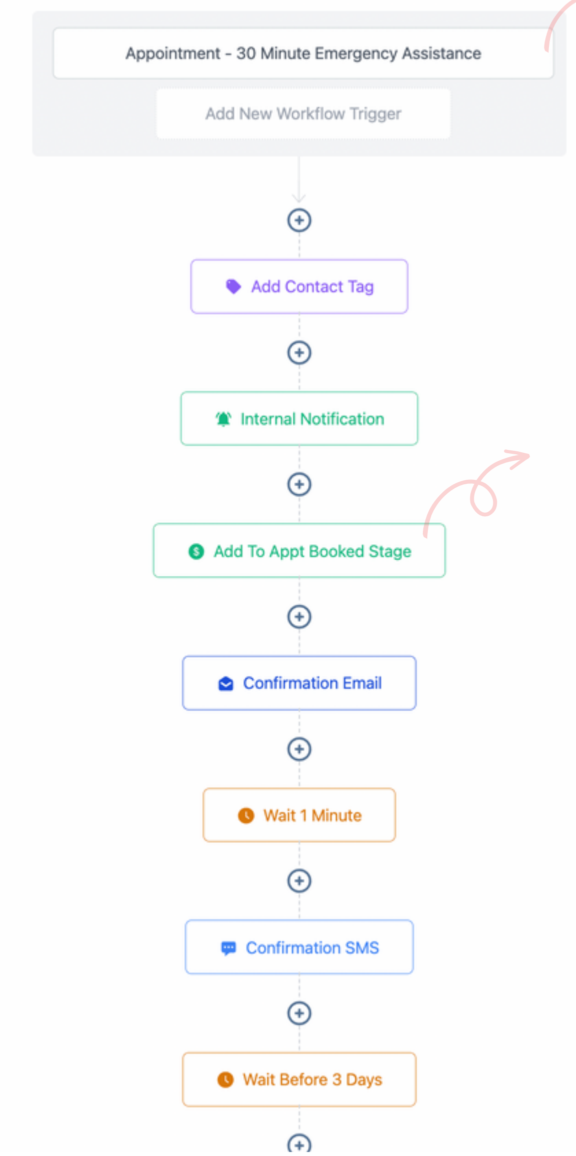
HOLDS A CONTACT ON THE STEP UNTIL A CERTAIN TIME OR CONDITION IS MET

Event	Description	Notes
Time Delay	Make a contact wait a certain amount of time before moving on to the next step	Wait time is based on when they enter the step, not the whole workflow
Event/Appointment Time	Make a contact wait until a given time before or after an appointment or event start date before moving onto the next step	For events, make sure you set the event start time –For appointments, the system will automatically pull in the date and time
Overdue	Make a contact wait until before or after the invoice due date	
Condition	Make a contact wait until a certain condition is met in their contact details. Like, wait until they have x tag before moving on to the next step	
Contact Reply	Wait until the contact replies to a specific message of your choice before moving on to the next step	Must use the wait for reply step before since they have to reply before you split based on their response
Trigger Link Clicked	Wait until the contact clicks a specific trigger link of your choice before moving onto the next step	Must use the wait for click event step before since they have to click before you split based on their response
Email Event	Wait until the contact opens a specific email of your choice before moving onto the next step	Must use the wait for email event step before since they have to perform an action before you split based on their response

06

WORKFLOW PLAN

Each workflow you create will have specific purposes, triggers, settings, actions, and other customizations you configure. Use this worksheet to start brainstorming any workflow you are creating.



1. **Know you need to build one**
   If you can form your goal into an "if this, then that" statement or you want the system to execute certain actions automatically

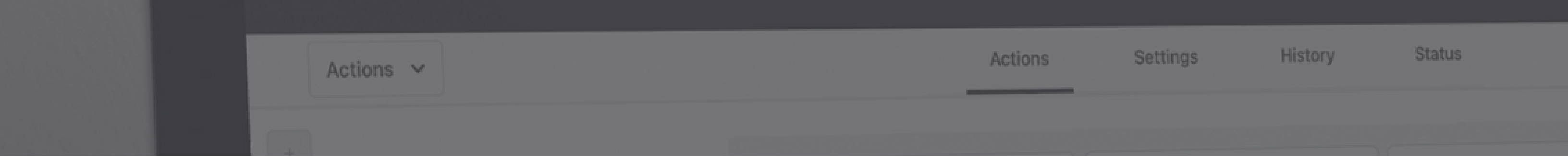
2. **Create your connected pieces**
   Make sure your other pieces like a form or landing page are at least created so you can connect them & configure your settings

3. **Create your trigger & specify it's filters**

4. **Brainstorm action steps for the system to execute**

5. **Do you need to add an event start date action or remove them from another workflow?**

6. **Will you need any special operation steps such as branches, waits, etc.?**



TROUBLESHOOTING TIPS

MASTERING AUTOMATION ONE STEP AT A TIME

Have You Tested It?

Run through your process as a client would with placeholder information to ensure your automation is set up how you want. Use the Status, History, & Execution log tabs to your advantage and their contact record data. You can permanently delete your contact and test again.

Have You Cleared Your Cache?

Sometimes when your browser, system, app, or other services push updates that clog up your browser cache. Clearing your cache only gets rid of the data your device has stored from the websites and apps you visit—it has no impact on your photos or the files you have saved there.

Do Your Triggers Need Additional Filters?

See what filters you can add to your workflow triggers to give more context to what your requirements are for this to fire. Just telling it to fire off of ”Form Submitted” doesn’t tell you WHAT form you are talking about....unless you add the ”form is” filter.

Have You Sent A Loom Video To Support?

Make sure to use loom.com as a resource when communicating with the support team, they give us an immense amount of context as to what your issue is so we can get you a solution quicker.

Is Allow Multiple On?

The allow multiple toggle under workflow settings determines whether a single contact can enter your workflow more than once. Think about if this would fit your project & if you need it on temporarily for testing.

Have You Looked Through Workflow Logs?

After adding or testing a workflow you can view every step executed in chronological order for all contacts within the History tab. Under the Status tab of a workflow, you can view each contact in your flow & what step they are currently on, next execution, etc. These are so helpful when troubleshooting.

Have You Checked Your Audit Logs?

When viewing your account settings, you can scroll down on the left side menu to view various logs and changes made to contacts, custom fields, values, and so much more. This is so resourceful when looking at who, what, when, or where a change was made.

Have You Tried An Incognito Tab or Other Browser?

Sometimes when there are updates or your cache is blocking the system from functioning correctly, you may want to try testing in an incognito private browser where your cache doesn’t carry over or in a new browser like Safari.

NEED MORE HELP?

CHECKOUT OUR SUPPORT OPTIONS & RESOURCES

Our team is fully dedicated to supporting you every step of the way, ensuring your success. You can review the wide range of resources and support options available to guide you through any challenges or inquiries. Don’t hesitate to reach out to our team whenever you need additional assistance; we’re always here to help!

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