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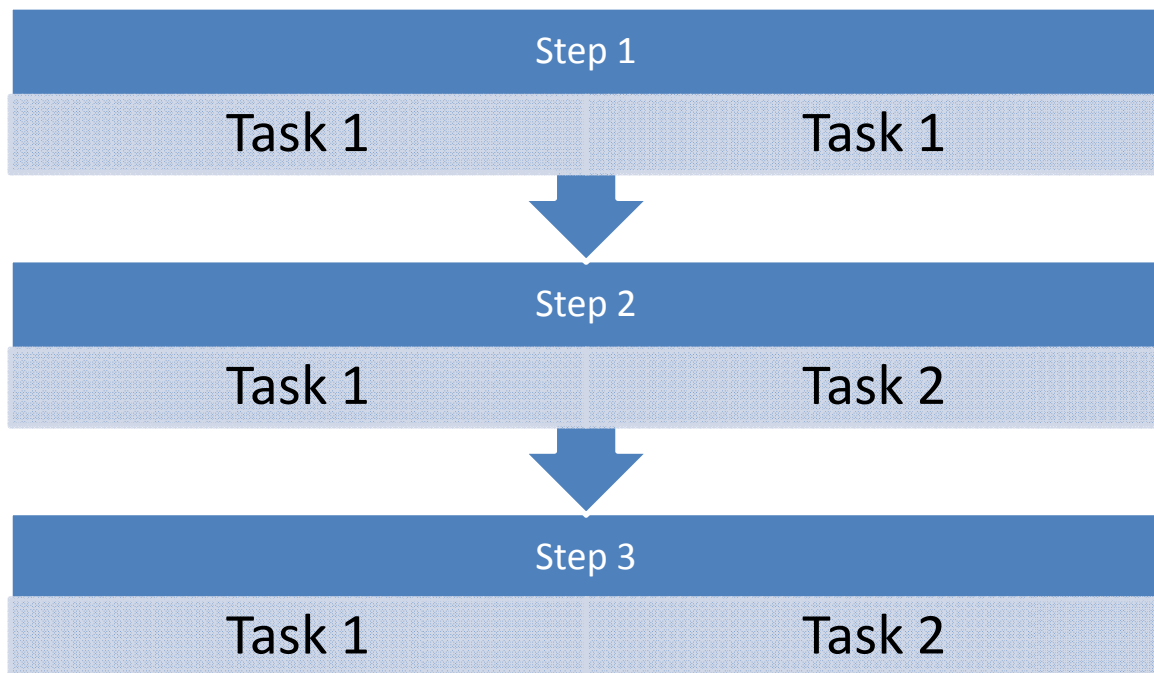
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Chapter 1 - Understanding the Workflow System

What is a workflow?

In simple terms, a “workflow” is a series of steps or actions required to complete a process. In your business, a workflow could be the series of steps that are defined to achieve a desired result.

For every step your workflow has, it could contain a series of tasks necessary before completing the current step and moving to the next. Below is an example of a workflow.



If your business was to manufacture automobiles, your workflow process for assembling the car could be as simple as:

Workflow: How to Assemble a Car

Step 1: Apply body to the car frame

Step 2: Install car interior

Step 3: Paint the car

Step 4: Install the Wheel and Tires

Step 5: Test Drive finished car

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Each step in a workflow represents a series of tasks or actions that need to occur in order to complete that step and move forward to the next step. Using the same example above, let's look at Step 1 in more detail.

Step 1: Apply car body to the car frame

Task 1: Obtain correct car body and move to assembly line

Task 2: Gently lower the car body in top of the car frame

Task 3: Secure the car body to the car frame

In this example, in order to complete Step 1 a series of tasks must be completed first. Each task is in a sequential order which instructs the worker exactly what he must do in order to “Apply car body to the car frame”.

Another example workflow could be a process of converting a lead/prospect into an active client.

Step 1: Lead Follow-up

- Task 1 – Call lead and set-up appointment to meet

- Task 2 – Meet client and provide sales information

Step 2: Provide Quote

- Tasks 1- Create sales quote

- Tasks 2- Email quote to client

Step 3: Close the sale

- Task 1- Collect payment from client

The Workflow Functionality in your content management system allows you to define your business processes and make it available for your users to follow.

In the next few chapters you will learn how to create a workflow, create steps, create tasks, and also create automations to help make your workflow more efficient.

Workflow System inside your CMS

The workflow system is available throughout your content management system.

In the main menu you will find the following two tabs:

Workflow Manager – Create, Edit, and Manage workflows

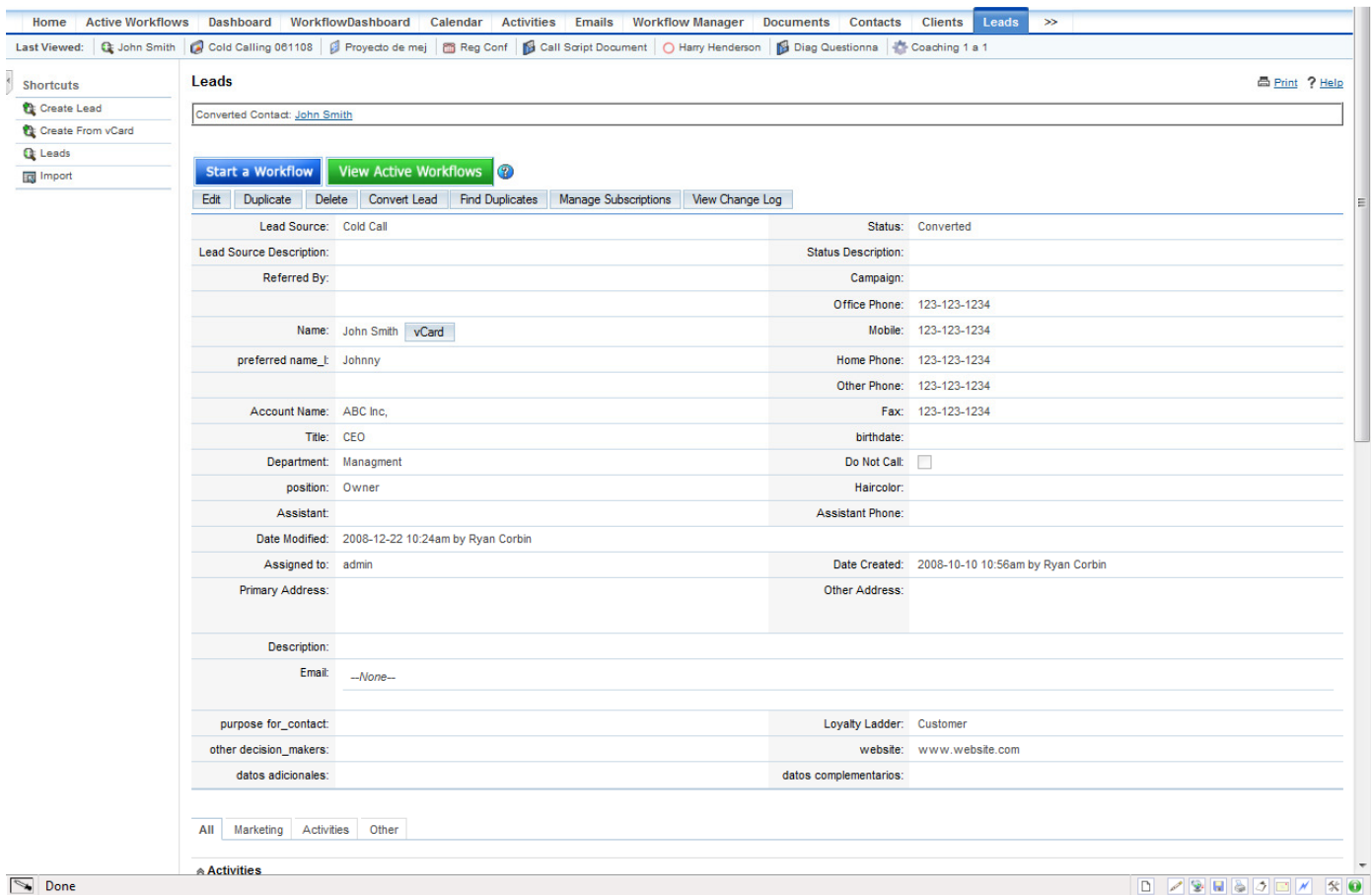
Active Workflows – Listing of all active workflows by name and user



Inside the following tabs, you will find workflow buttons on the details page allowing you to apply a workflow to any of the listed objects.

Leads Contacts Opportunities Accounts Documents Projects

(Example of LEADS page when a lead is selected)



Chapter 2 – Creating a Workflow

Define Your Processes

Before you begin building a workflow it is helpful to outline your current business processes.

Things to Know Before you Begin:

- A workflow can have as many steps, tasks, and automations as needed.
- The workflow system allows you to create as many individual workflows as needed so it is not necessary to create one long workflow to define everything.
- Workflows allow you to be detailed with your instruction and tasks. Try to create your workflow as if you were explaining your process to a new employee.
- Workflows are linear meaning one step follows another. You can make steps mandatory or give them the ability to be skipped.
- You can only run one instance of a particular workflow at a time on a business object. If you already are running your “Lead Follow-up” workflow against lead “Jim Jones” you can’t run that same one again on “Jim Jones” till the first one is completed.
- You can however run different workflows against the same lead.
- You can create automations such as sending an email, setting a reminder task or creating an appointment inside a task that are triggered when the step is started.
- Workflows have the ability to convert objects into other object types such as LEAD to an ACCOUNT
- A workflow is completed when all steps have been completed

Creating a simple outline of your processes is the simplest way to help define your workflows.

1. Start by defining your workflow by thinking who will use it and what end result should occur. Then outline those high-level steps by writing them down.

Example: Workflow Name: Lead Follow-up

Step 1: Email Marketing

Step 2: Direct Mail Marketing

Step 3: Phone Marketing

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2. Next, start defining the tasks that need to be accomplished before a step can be completed.

Example: Workflow Name: Lead Follow-up

Step 1: Email Marketing

Task: Send email to lead

Step 2: Direct Mail Marketing

Task: Write Postcard

Task: Mail Postcard

Task: Leave note in CRM

Step 3: Phone Marketing

Task: Call Lead

3. Lastly, you can identify any tasks that can be automated by the system when running the workflow to make it more efficient. Tasks with actions allow the user to “check-off” the tasks when completed.

Example: Workflow Name: Lead Follow-up

Step 1: Email Marketing

Task: Send email to lead

Automation: Send “Lead” email template to lead

Step 2: Direct Mail Marketing

Task: Write Postcard

Automation: Set reminder task in calendar

Task: Mail Postcard

Automation: Set reminder task in calendar

Task: Leave note in CRM

Automation: Set reminder task in calendar

Step 3: Phone Marketing

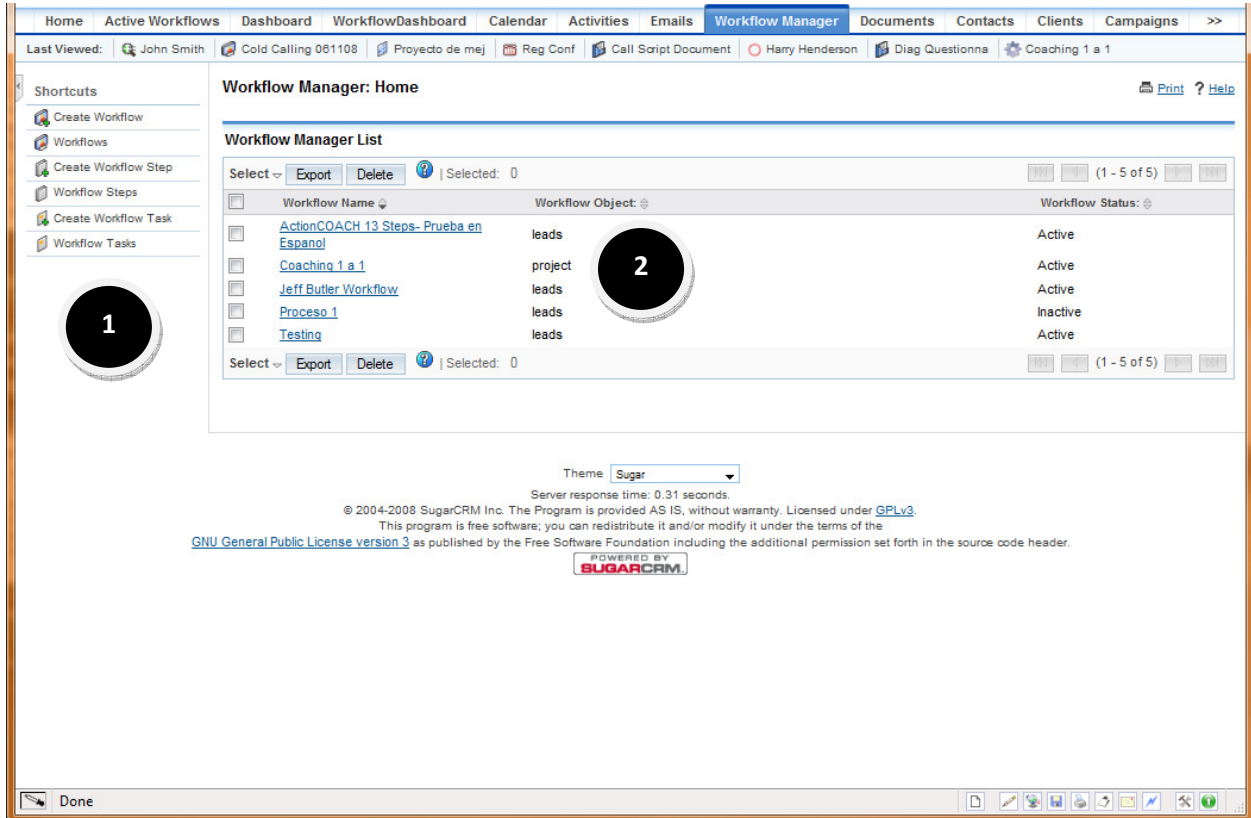
Task: Call Lead

Automation: Set “call” appointment in calendar for 24 hours after Step 3 was started

The Workflow Manager

The Workflow Manager page in your CRM allows you to create, edit and manage your workflows.


The page has several options allowing you to manage all the different areas of a workflow.



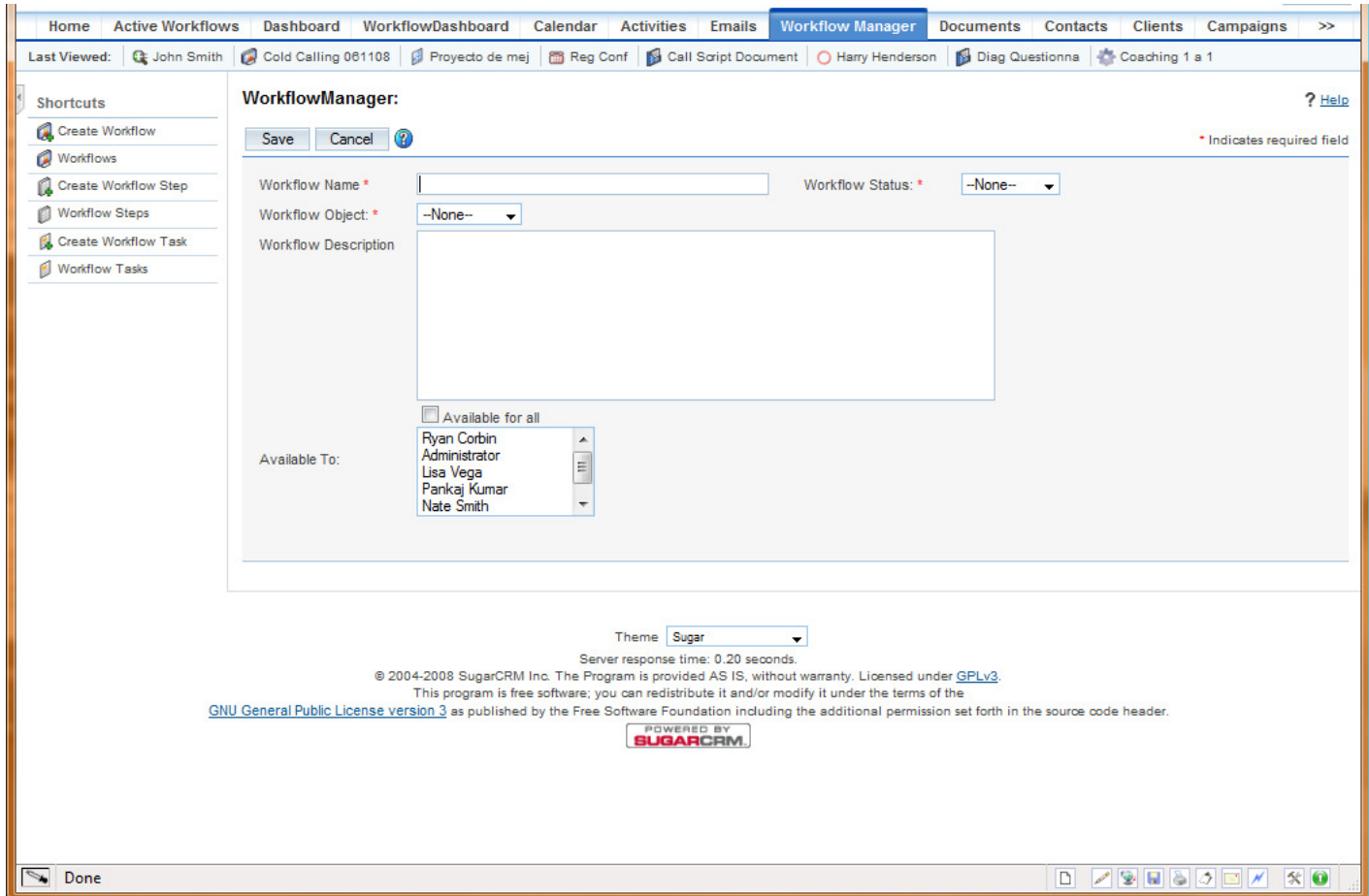
Black Dot 1: This is called the SHORTCUTS menu. It has options that allow you to quickly create a new workflow, create a workflow step, create a workflow task, and others.

Black Dot 2: This is the list of all workflows that have been created previously. Clicking on the workflow name will display the details of that selected workflow and edit or delete if necessary.

Creating a Workflow

To create a workflow, start by clicking on the shortcut labeled “Create Workflow” on the left of your screen. At any time you can click the round blur circle with the question mark  to receive instructions about the workflow page you are on.

You will then see a short form asking information about your workflow that you must complete.



Complete the following information. *All fields labeled with an * are required to continue.

1. Workflow Name:

Start by giving your new workflow a name.

2. Workflow Status:

You can set the status of your workflows from this first page. While you are creating the workflow you can set the status to INACTIVE meaning that your CRM users will not be able to use it until you are complete. Setting the workflow to ACTIVE allows your CRM users to be able to use it. You can always edit the workflow later to have it discontinued for further use by setting the status to PHASE OUT. This will allow all CRM users to complete their open workflow but will not allow them to use that workflow again for new objects.

3. Workflow Object:

Choose a workflow object from the drop down to have the workflow work with such as a lead or a contact.

4. Workflow Description:

Write a brief description to help you remember the purpose of this workflow.

5. Available for All:

Select this checkbox if you wish to have ALL users of your CRM to be able to use the workflow you are creating.

6. Available To:

If you do not want all users to be able to use the new workflow you can select the users individually that should be able to access it. Hold down the CTRL key on your keyboard while selecting users if you want to select more than one at a time.

7. SAVE:

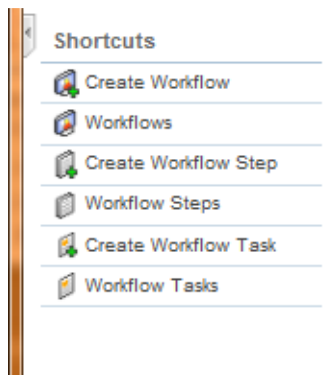
Click the SAVE button above to move on to the next step

Create a Workflow Step

Now that you have given your workflow a name and set its purpose, you can now start creating steps to go inside your workflow.

On the shortcuts menu on the left of your screen you will notice two options. One is the option to create a new step. The other is the option of viewing all existing steps.

The workflow system allows steps and tasks to be created for use in all workflows. This will allow you to reuse steps and tasks that were created previously in new workflows which will save you time when creating new workflows.

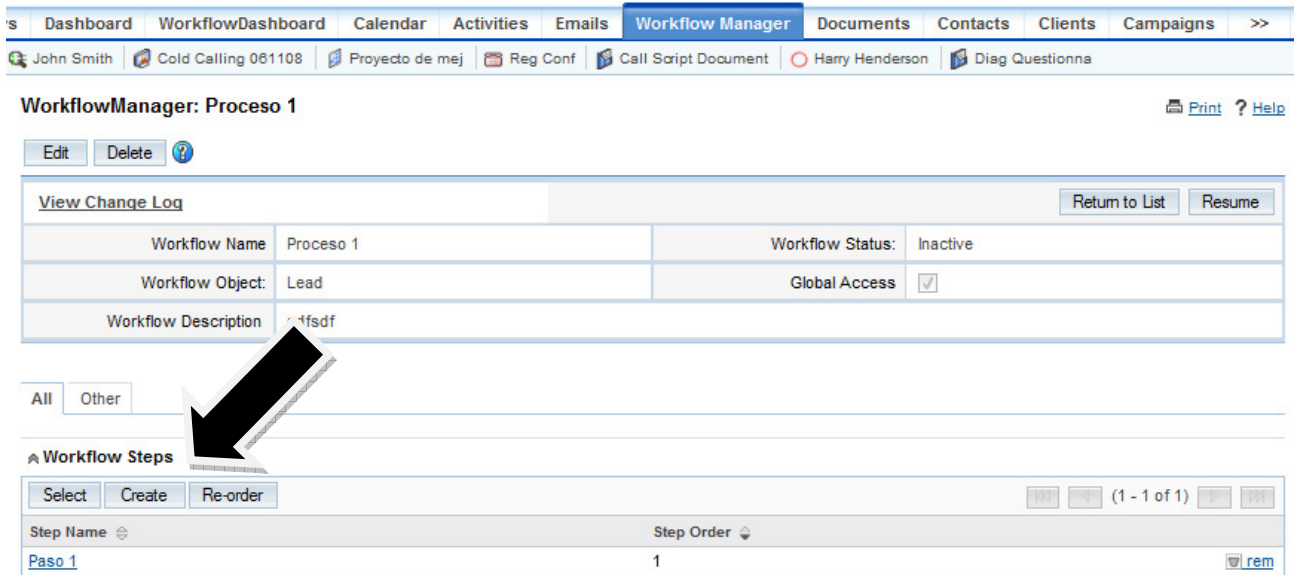


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There are two ways to add a new step to your workflow.

1. Click the “Create” button under the workflow Steps section of the workflow details page.
2. Create a new step by clicking the shortcut on the left menu and associating it with your workflow later by clicking “select” on the selected workflow details page in the steps section.

Example Workflow Detail Page showing workflow steps create and select buttons.



The screenshot shows the 'Workflow Manager: Proceso 1' page. At the top, there is a navigation bar with tabs for Dashboard, WorkflowDashboard, Calendar, Activities, Emails, Workflow Manager (selected), Documents, Contacts, Clients, and Campaigns. Below the navigation bar, there is a user profile section for John Smith and a list of active workflows including 'Cold Calling 081108', 'Proyecto de mej', 'Reg Conf', 'Call Script Document', 'Harry Henderson', and 'Diag Questionna'. The main content area is titled 'WorkflowManager: Proceso 1' and includes 'Edit' and 'Delete' buttons. Below this is a 'View Change Log' section with a table containing workflow details: Workflow Name (Proceso 1), Workflow Status (Inactive), Workflow Object (Lead), Global Access (checked), and Workflow Description (1fsdf). At the bottom, there is a 'Workflow Steps' section with 'Select', 'Create', and 'Re-order' buttons. A table below these buttons shows one step: 'Paso 1' with 'Step Order' 1. A large black arrow points from the 'Create' button to the 'Workflow Steps' section.

Now that you have created your new workflow you can now add workflow steps.

1. Workflow Steps:

Scroll down the page to the “Workflow Steps” section.

2. Click SELECT

If you have workflow steps you have created previously and would like to reuse in this workflow, simply click the SELECT button to choose those steps from your workflow steps list.

3. Click CREATE

If your new workflow requires new workflow steps, click the CREATE button to start the process of creating a new step.

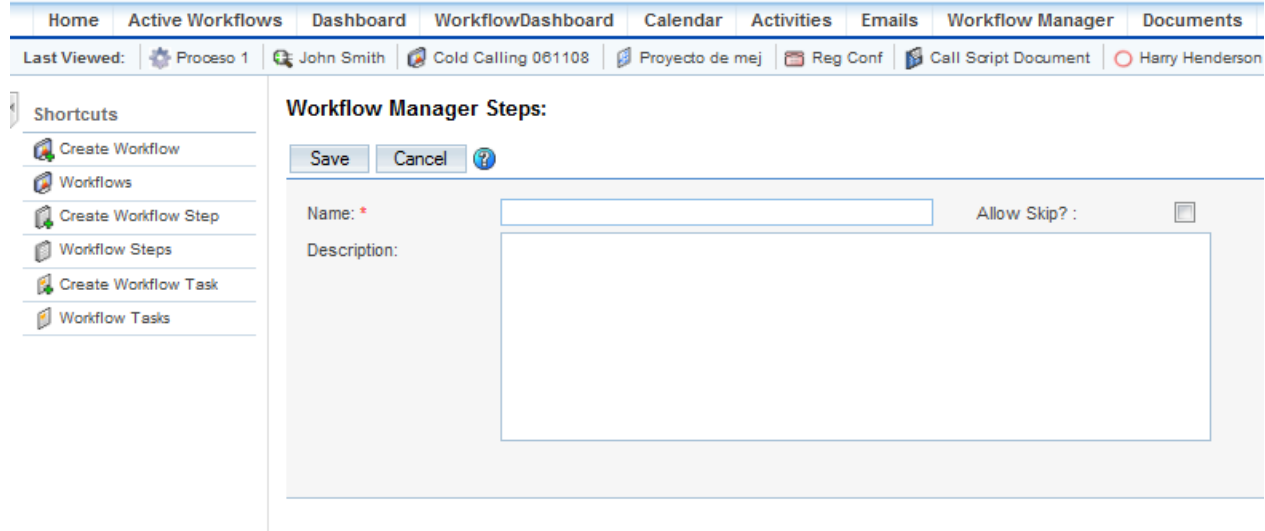
4. RE-ORDER

You can rearrange the order of your workflow steps at any time by clicking the RE-ORDER button.

5. Add workflow tasks

Once your workflow step has been created, click the step name to open the detail page for that step and add workflow tasks

Create your new workflow step by completing the form.



The screenshot shows a web application interface for creating a workflow step. At the top, there is a navigation bar with tabs: Home, Active Workflows, Dashboard, WorkflowDashboard, Calendar, Activities, Emails, Workflow Manager, and Documents. Below the navigation bar is a 'Last Viewed:' section with several items: Proceso 1, John Smith, Cold Calling 061108, Proyecto de mej, Reg Conf, Call Script Document, and Harry Henderson. On the left side, there is a 'Shortcuts' menu with the following items: Create Workflow, Workflows, Create Workflow Step, Workflow Steps, Create Workflow Task, and Workflow Tasks. The main content area is titled 'Workflow Manager Steps:' and contains a form with the following fields and controls:

- Buttons: Save, Cancel, and a help icon (?)
- Field: Name: * (with a red asterisk indicating it is required)
- Field: Allow Skip? : (with a checkbox)
- Field: Description: (with a large text area)

1. Name:

Give your new workflow step a name

2. Allow Skip?:

Checking this box will allow users to skip the workflow step.

3. Description:

Give your step a description that will help users identify the purpose of this workflow step

4. SAVE:

Click SAVE to continue to save your step.

*After creating your step be sure to add workflow tasks to your step.

Creating Workflow Tasks

There are two ways to add a new task to your workflow steps.

1. Click the “Create” button under the workflow Tasks section of the Workflow Steps details page.
2. Create a new Task by clicking the shortcut on the left menu and associating it with your workflow later by clicking “select” on the selected workflow details page in the steps section.

Example Workflow Step Detail Page showing workflow steps create and select buttons.

The screenshot shows the 'Workflow Manager Steps: 3. Prospect Inbound' page. At the top, there is a navigation bar with tabs like Home, Active Workflows, Dashboard, WorkflowDashboard, Calendar, Activities, Emails, Workflow Manager, Documents, Contacts, Clients, and Campaigns. Below the navigation bar, there is a 'Last Viewed' section showing '3. Prospect Inbound' and several workflow steps. The main content area is titled 'Workflow Manager Steps: 3. Prospect Inbound' and includes 'Edit' and 'Delete' buttons. Below this is a 'View Change Log' table with the following data:

Name:	3. Prospect Inbound	Allow Skip? :	<input type="checkbox"/>
Created by:	admin	Modified by:	admin
Created date:	2008-07-31 04:46pm	Modified date:	2008-10-06 06:49pm
Description:	Following the Marketing activity the Suspect may contact the Coach and make a positive response to the Marketing activity		

Below the table, there are 'All' and 'Other' tabs. The 'Workflows' section has a 'Select' button and a table with columns for 'Workflow Name' and 'Workflow Status'. The 'Workflow Tasks' section has 'Select', 'Create', and 'Re-order' buttons and a table with columns for 'Task Name' and 'Task Order'. A large black arrow points to the 'Select' button in the 'Workflows' section.

Create your new workflow task by completing the form.

The screenshot shows the 'Workflow Manager Task' form. At the top, there is a navigation bar with tabs like Home, Active Workflows, Dashboard, WorkflowDashboard, Calendar, Activities, Emails, Workflow Manager, Documents, Contacts, Clients, and Campaigns. Below the navigation bar, there is a 'Last Viewed' section showing '3. Prospect Inbound' and several workflow steps. The main content area is titled 'Workflow Manager Task:' and includes 'Save' and 'Cancel' buttons. Below this is a form with the following fields:

- Task Name: * (required field)
- Allow Skip:
- Task Description: (text area)
- On Completion: --None-- (dropdown menu)
- Task Type: (text input)

At the bottom right, there is an 'Add' button. A small red asterisk indicates required fields.

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1. Task Name:

Give your new workflow task a name

2. On Completion:

Choose an action from the drop down if the task is to convert your original workflow object to a new object. For example: if your workflow was created for LEADS you can create a step to convert the LEAD to an OPPORTUNITY.

3. Allow Skip?:

Checking this box will allow users to skip the workflow task.

4. Description:

Give your task a description that will help users identify the purpose of this workflow task

5. Task Type:

Click the ADD button to add automation to your task such as “send email” or “schedule meeting”. You can create several automated tasks to happen when your workflow task is complete by adding more than one and setting the order.

6. SAVE:

Click SAVE to continue to save your task.

Adding Automations to Tasks

There are 6 types of automations you can add to a task to help make your workflow more efficient for your users.

Those 6 include:

1. Send Email – Have the system send email to you're the object you are running the workflow against (only applies to certain workflows like LEADS, CONTACTS, ACCOUNTS, OPPORTUNITIES)
2. Schedule Call - Creates a call appointment in the calendar for you or another user
3. Create Task – Creates a reminder task for you or the another user
4. Schedule Meeting – Creates a meeting appointment in the calendar for you or another user
5. Draft Email – Creates a draft email that can be sent manually at another time
6. Document – Creates a direct link to the documents page for the user when running a workflow

These tasks all have several options allow you to schedule and adjust the timing.

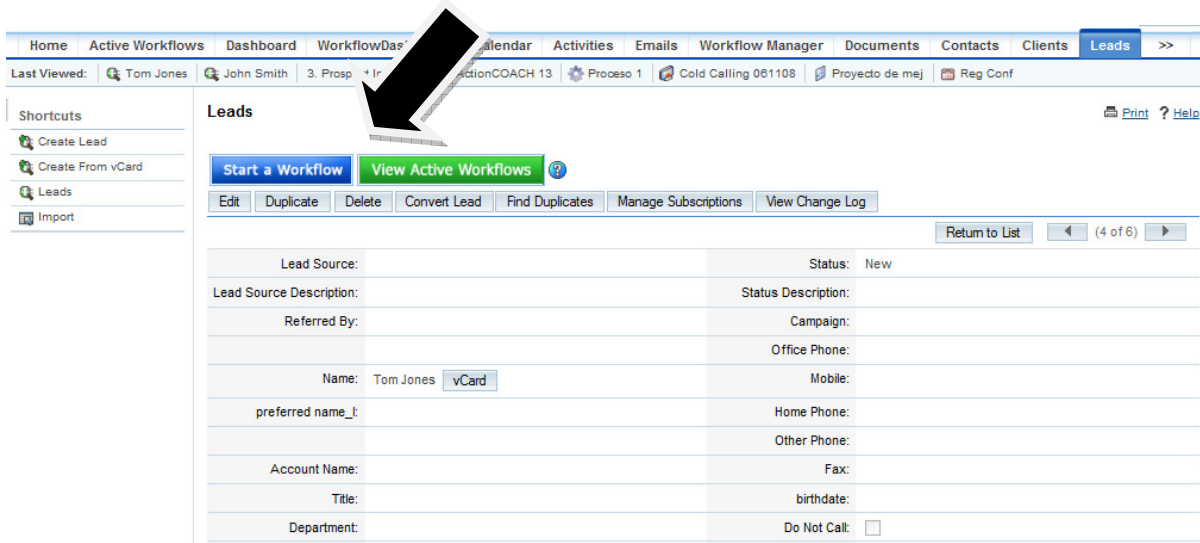
Chapter 3 - Using a Workflow

Apply a workflow to a business object

Now that you have your workflows created you or your users can use them to apply to any business object.

If you created a workflow that is specifically for leads, start by clicking on the leads page in the CRM.

Next click the name link of any lead on the list page. This will open the details view of your lead and display the workflow buttons at the top.



The screenshot shows the CRM interface with the 'Leads' page selected. The top navigation bar includes 'Home', 'Active Workflows', 'Dashboard', 'WorkflowManager', 'Calendar', 'Activities', 'Emails', 'Workflow Manager', 'Documents', 'Contacts', 'Clients', and 'Leads'. Below the navigation bar, there are several tabs for different lead sources: 'Tom Jones', 'John Smith', '3. Prosp', 'ActionCOACH 13', 'Proceso 1', 'Cold Calling 061108', 'Proyecto de mej', and 'Reg Conf'. The main content area is titled 'Leads' and contains two buttons: 'Start a Workflow' (blue) and 'View Active Workflows' (green). Below these buttons are several action buttons: 'Edit', 'Duplicate', 'Delete', 'Convert Lead', 'Find Duplicates', 'Manage Subscriptions', and 'View Change Log'. The lead details form is displayed below, showing fields for 'Lead Source', 'Lead Source Description', 'Referred By', 'Name', 'preferred name_', 'Account Name', 'Title', 'Department', 'Status', 'Status Description', 'Campaign', 'Office Phone', 'Mobile', 'Home Phone', 'Other Phone', 'Fax', 'birthdate', and 'Do Not Call'.

There are two Workflow buttons:

1. Blue Button – “Start a Workflow” - This allows you to start a new workflow against this business object. Click one of the workflow names in the pop-up list to begin.
2. Green Button – “View Active Workflows” – This allows you to see all current workflows running against this business object and select to open.

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The workflow page will display allowing you and your users to see a dashboard of all the steps within the workflow and tasks associated with the current step.

The screenshot displays the 'Active Workflows: Bob Jones' interface. At the top, there is a navigation bar with tabs for Dashboard, WorkflowDashboard, Calendar, Activities, Emails, Workflow Manager, Documents, Contacts, Clients, Leads, and a right arrow. Below the navigation bar, the user's name 'Bob Jones' and other active workflows like 'Tom Jones', 'John Smith', '3. Prospect Inbound', 'ActionCOACH 13', 'Proceso 1', and 'Cold Calling 061108' are listed. The main section is titled 'Active Workflows: Bob Jones' and includes 'Print' and 'Help' icons. Below this, there are 'Edit' and 'Delete' buttons. A 'View Change Log' section shows a table with the following data:

Name:	Bob Jones	Assigned to:	admin
Workflow Process:	ActionCOACH 13 Steps- Prueba en Espanol		
Description:			

Below the table, there is a detailed view of the workflow steps. On the left, a list of 13 steps is shown, with the first three steps checked: 1. Database Selection - Selección de la Base de Datos, 2. Marketing, and 3. Prospect Inbound. Step 4, 'Prospect Follow Up', is currently selected. On the right, the detailed view for step 4 is shown, including a description, a 'Reschedule' button, a 'DM follow up for Diag' link, and 'Step Back' and 'Complete' buttons. A note at the bottom states: 'Please complete all Tasks/Calls/Meetings to enable complete button'.

Your workflow may look different depending on the amount of information and description you provided for each step, task and automation.

Notice in this example that the task requires a call appointment and has a link to a document. In order to continue to the next step the user will need to check the box acknowledging that the call appointment was held. Once the user checks this box, the CONTINUE button will become visible allowing the user to click and continue to the next step.

You can go backwards in your workflow if needed by clicking the STEP BACK button.

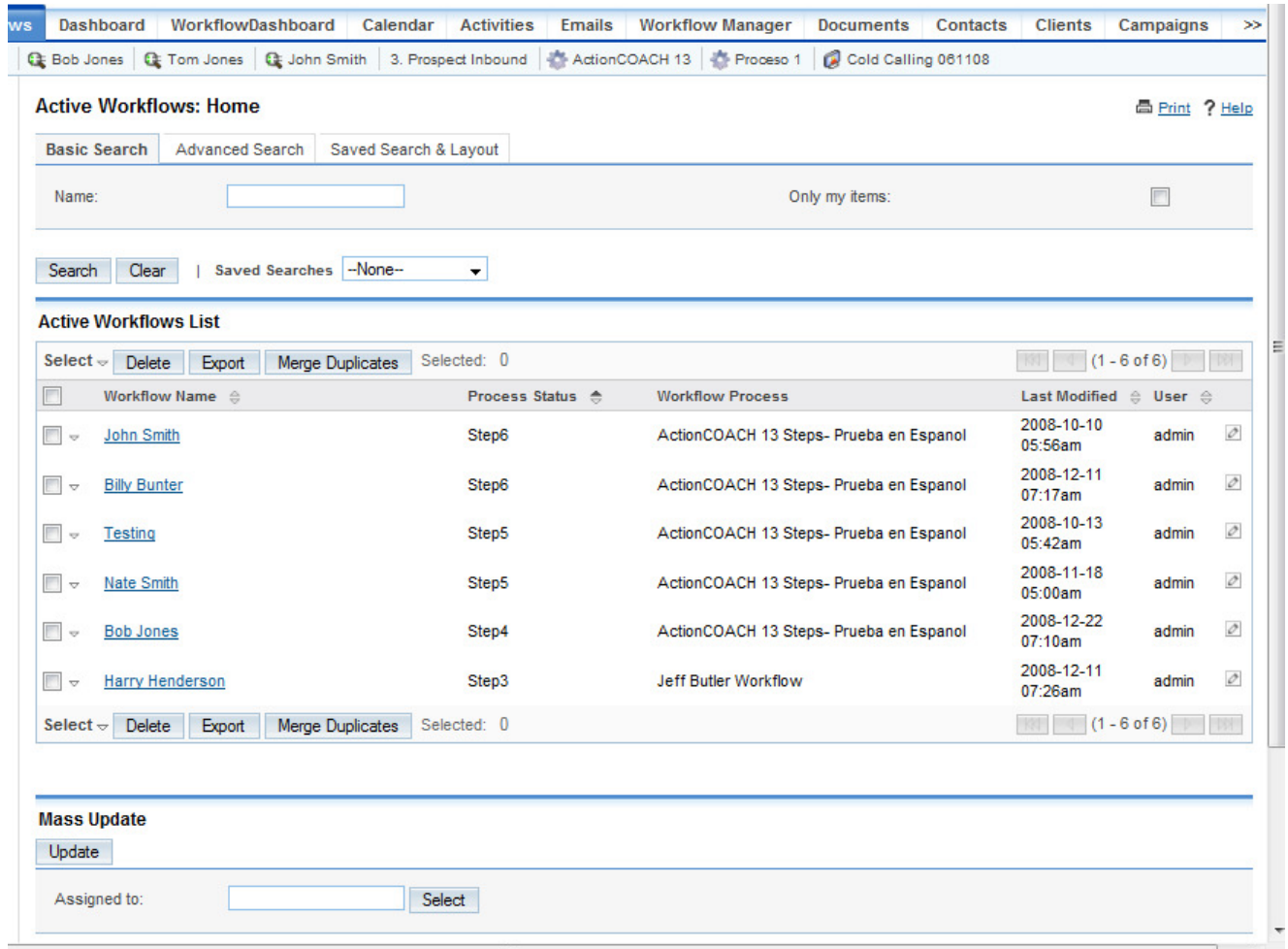
You can pause a workflow if your business object will not let you continue for a long while. Click the PAUSE button to simply stop the workflow and automations.

You can permanently stop a workflow at any time by clicking the TERMINATE button.

Warning! – Clicking this button will stop all steps and require you to start the workflow from step 1.

Chapter 4 – Active Workflows

You can check the status of all workflows at any time by using the main page called “Active Workflows”. Click on the menu tab called “Active Workflows” to see this information.



Workflow Name: The names of the business objects who currently have a workflow against them.

Process Status: The current step that the business object is on in the workflow

Workflow Process: The description (name) of the workflow itself

Last modified: The date the workflow was last edited

User: The name of the user (employee) who is running the workflow currently

Clicking the name link of the business object will open that particular workflow.