**Work-Flow**

**Creating Workflow Automations**

Workflow Rules are a set of actions (alerts, tasks, field updates and custom functions) that are executed when certain specified conditions are met. These rules automate the process of sending email alerts, assigning tasks and updating certain fields of a record when a rule is triggered. Workflow automation consist of the following components:

* Workflow Rules: A set of rules that are executed when specified conditions are met.
* Workflow Alerts: Automated email notifications sent on triggering a workflow rule.
* Workflow Tasks: Tasks that are assigned to the users when workflow rules are triggered.
* Workflow Field Updates: Automatically update the specified field values on triggering a workflow rule.

Workflow rules help you to improve efficiency by eliminating the manual work of performing certain tasks. It also improves help desk processes through standardized working methods, thereby reducing operating costs.

In Zoho Desk, a typical workflow rule will consist of the following four elements:

* **Basic Information** - Specify details on the module type for which the rule applies, rule name, description, and option to activate the rule.
* **Execute On** - Specify when the rule should be triggered for a record and based on what. Rules can be triggered when: records are created, edited, created/edited; specific fields are updated; receiving customer reply; responding to tickets; sending/receiving private email threads; receiving happiness ratings; or deleting tickets.  
  The rule triggers like Customer Reply, Agent Response, Private Thread, Happiness Ratings and Delete are available only for the **Tickets** module.
* **Rule Criteria** - List out the criteria to filter out records that meet the criteria. Workflow rule is triggered to these records.
* **Actions** - Add alerts, tasks, field updates, and custom functions that run immediately when the rule is executed.

**Note:**

* Only users with Profile permission for managing Help Desk Automation can access this feature.
* Workflows are not available on the Free edition.
* You can create a maximum of 5 rules/15 rules/30 rules per module per department in the Standard, Professional, and Enterprise editions, respectively.
* In each workflow rule, you can configure up to 10 alerts, 10 tasks, and 10 field updates.
* If your Zoho Desk account is downgraded or the subscription expired, the workflow rules will be disabled. You are required to enable the rules when you renew the subscription manually.

**To create a workflow rule:**

Part 1: Basic Information

* Click the **Setup** icon (  ) in the top bar.
* In the *Setup Landing* page, click **Workflows** under **Automation**.
* In the *Workflows List* page, click **Create Rule** in the upper-right area
* In the *New Workflow* page, do the following:
* Select the **Module** to which the rule applies from the drop-down list.
* Enter the **Rule Name**.
* Select the **Active** checkbox if you want the rule to be active.
* Enter the **Description** for the workflow rule.
* Click **Next**.

Part 2: Execute On

The execution option lets you specify an action (Create, Edit, etc.) based on which workflow rules will be triggered.

* In the *Execute On* section, select one of the following:
* **Create**: Executes the rule when records are created.
* **Edit**: Executes the rule when existing records are modified.
* **Field Update**: Executes the rule when the values of the specified fields are modified in a record.  
  Please note, this option is available only in the **Enterprise** edition.
* **Customer Reply**: Executes the rule when a new reply is received from the customer.
* **Agent Response**: Executes the rule when agents send a new reply to tickets.
* **Private Thread**: Executes the rule when agents send and receive private email threads.
* **Happiness Ratings**: Executes the rule when a rating is received for a ticket.
* **Delete:** Executes the rule when existing records are deleted.
* When you select the **Field Update** option, do the following:
* Choose the field name from the drop-down lists.
* Click the **All/Any** link to execute the rule when all or any of the selected fields are updated.
* When you select the **Private Thread** option, you can choose to execute the rule for **incoming** or **outgoing** email responses or **both**.
* When you select the **Happiness Ratings option,** specify the rating from the drop-down lists.  
  You can choose to execute the rule for **All Ratings** or a **particular** rating.  
    
  
* Click **Next**.

