Status Progression Workflows - Manual Setup

Create These 2 Workflows in EspoCRM

WORKFLOW 1: New → Contacted

Basic Configuration

Name: Status: New to Contacted
Entity Type: Lead
Type/Trigger: After record updated
Active: ✓ Yes

Conditions

Use Formula Condition:

```javascript
status == 'New' && record\count('Call', 'parentId=', id, 'parentType=', 'Lead',
'status=', 'Held') > 0
```

What this means: Progress from New to Contacted when first call is completed.

Actions

Action Type: Update Record

Fields to Update:

- **Field:** status
- **Value:** Contacted

Save and Activate

Click "Save" and ensure workflow is **Active**

WORKFLOW 2: Contacted → Verified

Basic Configuration

Name: Status: Contacted to Verified
Entity Type: Lead
Type/Trigger: After record updated
Active: ✓ Yes

Conditions

Use Formula Condition:

```javascript
status == 'Contacted' && record\count('Call', 'parentId=', id, 'parentType=',
'Lead', 'status=', 'Held') >= 2
```

What this means: Progress from Contacted to Verified after 2+ calls completed.

Actions

Action Type: Update Record

Fields to Update:

- **Field:** status
- **Value:** Verified

Save and Activate

Click "Save" and ensure workflow is **Active**

Step-by-Step Instructions

Creating Workflow 1:

1. **Go to Workflows**
    - Administration → Workflows

- Click "Create Workflow"

2. **Basic Info Tab**

   - Name: `Status: New to Contacted`
   - Entity Type: Select "Lead"
   - Type: Select "After record updated"
   - Check "Active"

3. **Conditions Tab**

   - Click "Add Formula"
   - Paste: `status == 'New' && record\count('Call', 'parentId=', id, 'parentType=', 'Lead', 'status=', 'Held') > 0`
   - Click outside formula box to save

4. **Actions Tab**

   - Click "Add Action"
   - Type: Select "Update Record"
   - In "Fields" section:
     - Click "Add Field"
     - Select "Status"
     - Set value to "Contacted"

5. **Save**

   - Click "Save" button
   - Verify workflow appears in list as "Active"

Creating Workflow 2:

1. **Create New Workflow**

   - Click "Create Workflow" again

2. **Basic Info Tab**

   - Name: `Status: Contacted to Verified`
   - Entity Type: Select "Lead"
   - Type: Select "After record updated"

- Check "Active"

3. **Conditions Tab**

- Click "Add Formula"
- Paste: `status == 'Contacted' && record\count('Call', 'parentId=', id, 'parentType=', 'Lead', 'status=', 'Held') >= 2`

4. **Actions Tab**

- Click "Add Action"
- Type: "Update Record"
- Fields:
  - Add Field → "Status"
  - Value → "Verified"

5. **Save and Verify Active**

Complete Status Flow After Setup

With formulas + these 2 workflows, the complete automation will be:

```None
New (Manual entry)
  ↓ [After 1st call completed]
Contacted (Auto via Workflow 1)
  ↓ [After 2nd call completed]
Verified (Auto via Workflow 2)
  ↓ [When CRIB ≥650 + FOIR/DTI pass]
Qualified (Auto via Formula)
  ↓ [Manual conversion]
Converted
```

Testing the Workflows

Test Case: Journey 1 Flow

1. **Create a lead:**

    - Set status = "New"
    - Save

2. **Add first call:**

    - Create a Call activity
    - Link to the lead (Parent Type: Lead)
    - Set status = "Held"
    - Save the call
    - **Check:** Lead status should auto-change to "Contacted"

3. **Add second call:**

    - Create another Call activity
    - Link to same lead
    - Set status = "Held"
    - Save the call
    - **Check:** Lead status should auto-change to "Verified"

4. **Add financial data:**

    - Edit the lead
    - Add: Monthly Income, Existing Obligations, Loan Amount, Tenure
    - Add: CRIB Score ≥ 650
    - Save
    - **Check:** Formula should calculate FOIR/DTI
    - **Check:** If qualification criteria met, status → "Qualified"

Verification via API

After creating workflows, verify they're active:

Shell

```
curl -s -X GET
'https://espocrm-dev-220642639797.us-central1.run.app/api/v1/Workflow?where[0][
type]=equals&where[0][attribute]=entityType&where[0][value]=Lead&where[1][type]
=equals&where[1][attribute]=isActive&where[1][value]=true' \
  -u 'admin:Q2fp120dbL3BafWK' | grep -E '"name"|"id"'
```

Should show your 2 new workflows plus existing ones.

What These Workflows Do

Workflow 1: New → Contacted

Purpose: Automatically progress lead when first contact is made
Trigger: Any update to a lead
Logic:

- IF status is "New"
- AND at least 1 call with status "Held" exists
- THEN set status to "Contacted"

Journey 1 Example:

- Day 1, 10:00 AM: Lead created (status: New)
- Day 1, 11:30 AM: First call logged as "Held"
- **Result:** Status automatically becomes "Contacted"

Workflow 2: Contacted → Verified

Purpose: Progress lead after verification call completed
Trigger: Any update to a lead
Logic:

- IF status is "Contacted"
- AND 2 or more calls with status "Held" exist
- THEN set status to "Verified"

Journey 1 Example:

- Day 1, 11:30 AM: First call (status now: Contacted)
- Day 1, 02:00 PM: Second call logged as "Held"
- **Result:** Status automatically becomes "Verified"

Integration with Formulas

These workflows work together with the formulas:

Stage	**Automation**	**Method**
New → Contacted	After 1st call	Workflow 1
Contacted → Verified	After 2nd call	Workflow 2
Verified → Qualified	CRIB + Financial pass	Formula (in Lead entity)

The formula handles Verified → Qualified automatically when:

1. CRIB score ≥ 650
2. Financial qualification = Pass (FOIR < 60%, DTI < 50%)

After Workflow Setup

Once both workflows are created and tested:

1. ✅ Test complete flow with sample lead
2. ✅ Verify status progressions automatic
3. ✅ Update layouts to show new fields
4. ✅ Move to Phase 2 (Conversion automation)