Automation Workflow

Automation workflow consists of one or more actions triggered by a defined start condition.

Automation workflow is linear and does not include conditional actions. If the user desires to deviate from a linear path based on a condition, then they should create shorter automation workflows. Then, they can stop one automation workflow and start another workflow.

Start/Stop

Automation may be started or stopped using the conditions below. Although the conditions may match, automation may start with one condition and stop with another. For example, automation may trigger when a tag is applied but stop when a form is submitted. And, defining a stop point is optional.

1. SmartSearch
    a. Select existing advanced search (that includes the criteria below)
    b. Create new advanced search
2. Submitted form
    a. Select existing form
    b. Create new form
3. Clicked link
    a. How do we determine which link? Perhaps this is only a stop condition
4. Lifecycle
    a. Single-selection or multi-select?
5. Tagged
    a. Enter existing tag
    b. Enter new tag
6. Visited page
    a. Select page
    b. Contains or matches pattern (regex)
7. Lead Score
    a. Exceeds
8. Toured community
    a. Select community

Actions

Actions are what happen between starting and stopping automation.

1. Send email
    a. Select existing email
    b. Create new email
2. Send text message
    a. Enter text message
3. Set a timer
    a. Delay timer
        i. Wait until a future time (minutes, hours, days, weeks, months)
        ii. Run on any day or weekday
        iii. Run at set time or between times
    b. Date timer
        i. Run on certain date or between dates

    - ii. Run at set time or between times
  - c. Field timer
    - i. Wait until a time (minutes, hours, days, weeks, months) before or after field
    - ii. Contact's date field(s)
    - iii. Run at set time or between times
4. Add a tag
    - a. Enter existing tag
    - b. Enter new tag
5. Remove a tag
    - a. Enter existing tag
    - b. Enter new tag
6. Adjust Lead Score
    - a. Value of points (positive or negative)
7. Change Lifecycle
    - a. Lifecycle options
8. Update a field
    - a. Select contact field
    - b. Enter value
9. Assign to a User
    - a. User options
10. Notify user or group
    - a. Account Executive (checkbox?)
    - b. User(s) and/or group (textbox)
    - c. Notification method (email, text, or both)
11. Add a task
    - a. Task form

Emails

Emails may include micro-workflows initiated by clicks.

When an email is added to or created in an automation workflow, the system shall identify all links within the email.

For each link within the email, the user may add one or more of the following actions:

1. Add a tag
2. Adjust Lead Score
3. Update a field
4. Notify user or group
5. Add a task – What if the link is a CTA with urgency such as 'I Would Like to Schedule a Tour'?

NOTE: Consider allowing common actions for all links within an email and then unique cases per link. For example, an Account Executive may want to notified of any clicked link but increase the lead score by varying amounts for each link.