



 Add Workflow

Edit Workflow

View Workflow

Copy Workflow

Delete Workflow

Dashboard

Contacts

Campaigns



Automation

Reports

Properties

Events

Created on 3/24/2012 by System
Modified on 8/21/2012 by Donna Ream

		Status	Contacts Started	Contacts In-process	Contacts Completed	Contacts Lost		
<input checked="" type="checkbox"/>	Rockwood Re-engagement	Active	224	123	110	6		
<input type="checkbox"/>	Custom Home Whitepaper	Draft						
<input type="checkbox"/>	Custom Home Whitepaper	Paused	34	0	4	0		

Dashboard

Contacts

Campaigns

Automation

Reports

Properties

Events

+

Add Workflow

Edit Workflow

View Workflow

Save Workflow As...

Delete Workflow

Workflow Report : Rockwood Reengagement

Select : Rockwood Reengagement

View by : 11/08/2013 to 21/11/2013

Sort by : All Time

Form Submitted

→

Send Email

Market Analysis

800

—

500

100

+

Timer

Wait 10 days

+

Send Email

Market Analysis

500

—

340

230

+

Add Tags

Market,Form

200

Workflow Summary

Total Contacts

120

Contacts Started

100

Contacts in process

50

Contacts Completed

40

Contacts Lost

10

Email Engagement

NewYork Market

Market Analysis

Process

Delivered

Opened

Clicks

Subscribed

Bounced

Lost

	Total	Lost	Delivered	Clicks	Views	Lead Score	Start Date	End Date
NewYork Market	1600	100	1500	700	800	100	11/08/2013	21/11/2013
Market Analysis	800	50	750	500	700	100	21/11/2013	28/12/2013

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Add Workflow

Edit Workflow

View Workflow

Save Workflow As...

Delete Workflow

Dashboard

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Properties

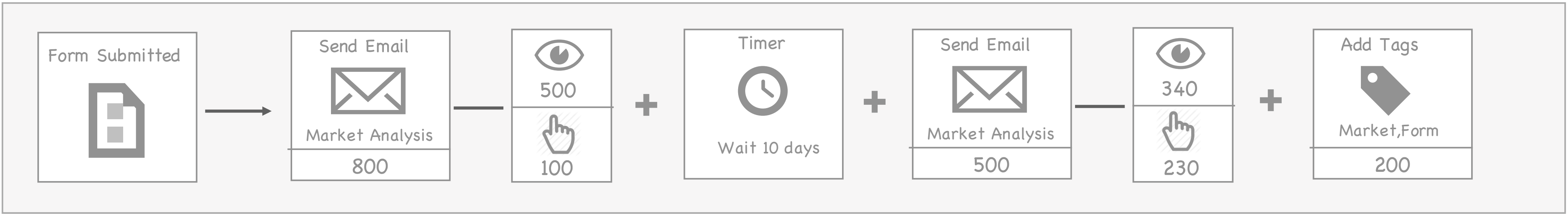
Events

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Rockwood Reengagement ▼

Select : Rockwood Reengagement ▼

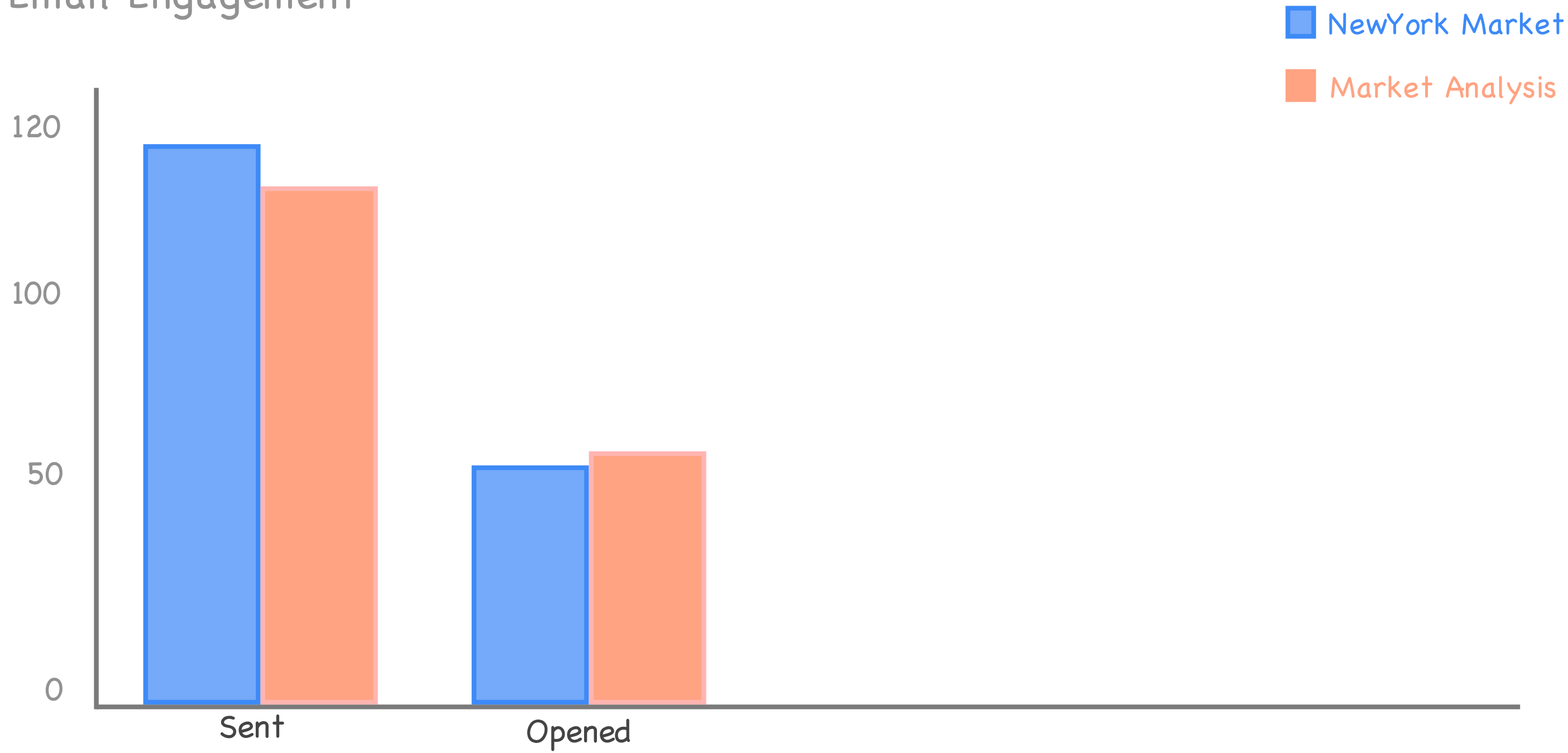
View by : 11/08/2013 to 21/11/2013 Sort by : All Time ▼



Workflow Summary

Total Contacts	Contacts Started	Contacts in process	Contacts Completed	Contacts Lost
120	100	50	40	10

Email Engagement



New

Q Search contacts, opportunities, campaigns, etc.

Advanced

Recent Activity

Messages

Settings

Dashboard

Contacts

Campaigns

Automation

Reports

Properties

Events

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Modified on 8/21/2012 by Donna Ream

[Automation Workflow name]

edit

Start this workflow when:

Form Submitted

Action Type

+

Add Action

Stop this workflow when: (Optional)

[triggers]

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Created on 3/24/2012 by System

Modified on 8/21/2012 by Donna Ream

Rockwood Engagement

edit

Settings

Start this Workflow when : Form Submitted

Austin Relocation Guide

+ Add Trigger

1. Send an Email to ALL

Austin Relo Guide - About Austin

 or

+ Create new email

+ Add actions to links

+ Add Action

2. Set Timer

Set timer based on a:

Wait at least:

Run on:

Run at:

Time delay

Date

Contact field

14

days

Any day

Weekdays

9:30 am

+ Add Action

3. Send an Email to ALL

Austin Relo Guide - version2

 or

+ Create new email

+ Add actions to links

+ Add Action

4. Add Tags

Tag(s) to add:

+ Add Action

5. Add Lead Score

Lead Score

+ Add Action

6. Change Lifecycle

[list of Lifecycle stages]

+ Add Action

Stop Workflow when : Link is Clicked

List of Links in this Workflow

+ Add Trigger

Steps of Workflow

Step 1: Send a Email to All

Austin Relo Guide - About Austin

Step 2: Set Timer

Time Delay for 14 days run on Anyday at 9:30 am

Step 3: Send a Email to All

Austin Marketing Guide

Step 4: Add Tags -Marketing,Sales,Austin

Step 5: Add LeadScore -150

Step 6: Change Lifecycle -Prospect



- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Created on 3/24/2012 by System

Modified on 8/21/2012 by Donna Ream

▼

Rockwood Engagement [edit](#)

Settings

Start this Workflow

Austin Relocation Guide

[+ Add Trigger](#)

1. Send an Email to ALL ▾

Austin Relo Guide - version2 ▾

 or [+ Create new email](#)

[+ Add actions to links](#)

[+ Add Action](#)

2. Set Timer

Set timer based on

☒ Time delay

☐ Date

☐ Contact field

[+ Add Action](#)

3. Send an Email to ALL ▾

Austin Relo Guide - version2 ▾

 or [+ Create new email](#)

[+ Add actions to links](#)

[+ Add Action](#)

4. Add Tags

Tag(s) to add:

[+ Add Action](#)

5. Add Lead Score

Lead Score

[+ Add Action](#)

6. Change Lifecycle

[list of Lifecycle stages] ▾

[+ Add Action](#)

Stop Workflow when : Link is Clicked

List of Links in this Workflow ▾

[+ Add Trigger](#)

Workflow Settings

Workflow Status

☒ Inactive

☐ Active

Is this workflow time-sensitive?

☐ Yes, inactivate the workflow on 4/22/2012

☒ No

Can a Contact complete this workflow more than once?

☐ Yes, anytime conditions are met

☒ No, just one time

Can a Contact be enrolled in this workflow and others at the same time?

☒ Yes, the Contact can be in other workflows

☐ No, unenroll the Contact from all workflows

☐ It depends, unenroll them from these workflows [list of workflows] ▾

Save

Cancel

Steps of Workflow

[Step 1:](#) Send a Email to All

Austin Relo Guide - About Austin ▾

[Step 2:](#) Set Timer

Time Delay for 14 days run on Anyday at 9:30 am

[Step 3:](#) Send a Email to All

Austin Marketing Guide ▾

[Step 4:](#) Add Tags -Marketing,Sales,Austin

[Step 5:](#) Add LeadScore -150

[Step 6:](#) Change Lifecycle -Prospect

[+ Add Trigger](#)

Dashboard

Contacts

Campaigns

Automation

Reports

Properties

Events

Created on 3/24/2012 by System

Modified on 8/21/2012 by Donna Ream

Rockwood Engagement

edit

Start this Workflow when : Form Submitted

Austin Relocation Guide

Add Trigger

1. Send an Email to ALL

Austin Relo Guide - About Austin

or

Create new email

Add actions to links

Add Action

2. Set Timer

Set timer based on a:

Time delay

Date

Contact field

Wait at least:

14

days

Run on:

Any day

Weekdays

Run at:

9:30 am

Add Action

3. Send an Email to ALL

Austin Relo Guide - version2

or

Create new email

Add actions to links

Add Action

4. Add Tags

Tag(s) to add:

Add Action

5. Add Lead Score

Lead Score

Add Action

6. Change Lifecycle

[list of Lifecycle stages]

Add Action

Stop Workflow when : Link is Clicked

List of Links in this Workflow

Add Trigger

Workflow Settings

Workflow Status

Inactive

Active

Is this workflow time-sensitive?

Yes, inactivate the workflow on

4/22/2012

No

Can a Contact complete this workflow more than once?

Yes, anytime conditions are met

No, just one time

Can a Contact be enrolled in this workflow and others at the same time?

Yes, the Contact can be in other workflows

No, unenroll the Contact from all workflows

It depends, unenroll them from these workflows

list of workflows

Steps of Workflow

Step 1:

Send a Email to All

Austin Relo Guide - About Austin

Step 2:

Set Timer

Time Delay for 14 days run on Anyday at 9:30 am

Step 3:

Send a Email to All

Austin Marketing Guide

Step 4:

Add Tags -Marketing,Sales,Austin

Step 5:

Add LeadScore -150

Step 6:

Change Lifecycle -Prospect



+ New ▼

Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

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Modified on 8/21/2012 by Donna Ream

▼

[Automation Workflow name] [edit](#)

Start this Workflow when : Form Submitted

Austin Relocation Guide

▼

+ [Add Trigger](#)

Send an Email to ALL ▼

Austin Relo Guide - A

Not Viewed Previous Email

[new email](#)

+ [Add actions to links](#)

Viewed Previous Email

+ [Add Action](#)

Set Timer

Set timer based on a:

Wait at least:

Run on:

Run at:

☒ Time delay

☐ Date

☐ Contact field

14

days

▼

☒ Any day

☐ Weekdays

9:30 am

+ [Add Action](#)

Send an Email to ALL ▼

Austin Relo Guide - version2

▼

 or + [Create new email](#)

+ [Add actions to links](#)

+ [Add Action](#)

Add Tags

Tag(s) to add:

+ [Add Action](#)

Add Lead Score

Lead Score

+ [Add Action](#)

Change Lifecycle

[list of Lifecycle stages]

▼

+ [Add Action](#)

Stop Workflow when : Link is Clicked

List of Links in this Workflow

▼

+ [Add Trigger](#)

Steps of Workflow

[Step 1:](#) Send a Email to All

Austin Relo Guide - About Austin

▼

[Step 2:](#) Set Timer

Time Delay for 14 days run on Anyday at 9:30 am

[Step 3:](#) Send a Email to All

Austin Marketing Guide

▼

[Step 4:](#) Add Tags -Marketing,Sales,Austin

[Step 5:](#) Add LeadScore -150

[Step 6:](#) Change Lifecycle -Prospect



- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

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▼

[Automation Workflow name] [edit](#)

Start this Workflow when : Form Submitted

Austin Relocation Guide

▼

[+ Add Trigger](#)

Send an Email

[+ Add Action](#)

Set Timer

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days

▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am

[+ Add Action](#)

Add Tags

Tag(s) to add:

[+ Add Action](#)

Add Lead Score

Lead Score

[+ Add Action](#)

Change Lifecycle

[list of Lifecycle stages]

▼

[+ Add Action](#)

Stop Workflow when : Link is Clicked

List of Links in this Workflow

▼

[+ Add Trigger](#)



New

Search contacts, opportunities, campaigns, etc. [Advanced](#)

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

[Automation Workflow name] [edit](#)

Start this workflow when:

[triggers]

1st Action

[actions]

[Add another action](#)

Stop this workflow when: (Optional)

[triggers]



New ▼

Search contacts, opportunities, campaigns, etc. [Advanced](#)

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted▼

[existing forms]▼

 or [+ Create new form](#)

1st Action

[actions]▼

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers]▼



⊕ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

▼

[Automation Workflow name] ✎ [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or ⊕ [Create new form](#)

☰

1st Action

[actions]

▼

⊕ [Add another action](#)

Stop this workflow when: (Optional)

[triggers]

▼



[+ New](#) ▼

[Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

▼

[Automation Workflow name] [✎ edit](#)

Start this workflow when:

A form is submitted

▼

Austin Relocation Guide

▼

or [+ Create new form](#)

☰

1st Action

Send an email

▼

Austin Relo Guide - About Austin

▼

or [+ Create new email](#)

[+ Add actions to links](#)

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers]

▼



+ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

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▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or

[+ Create new form](#)

1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or

[+ Create new email](#)

[+ Add actions to links](#)

2nd Action

Schedule 14 days and run on any day at 9:30am.

Set a timer ▼

[existing forms] ▼

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days ▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am

[+ Add another action](#)

2nd Action

Schedule 14 days and run on any day at 9:30am.

Set a timer ▼

[existing forms] ▼

Set timer based on a:

☐ Time delay

☒ Date

Run on:

☒ A date

4/22/2012

☐ Between dates

4/22/2012

4/22/2012

Run at:

9:30 am

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



+ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Created on 3/24/2012 by System
Modified on 8/21/2012 by Donna Ream

▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or

+ [Create new form](#)

1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or

+ [Create new email](#)

+ [Add actions to links](#)

2nd Action

Set a timer ▼

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days ▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am

3rd Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or

+ [Create new email](#)

+ [Add actions to links](#)

+ [Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



+ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

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▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or [+ Create new form](#)

1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

[+ Add actions to links](#)

2nd Action

Set a timer ▼

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days ▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am

3rd Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

Select link(s):

☐ Link Text #1

Link URL

☐ Link Text #2

Link URL

☐ Link Text #3

Link URL

☐ Link Text #4

Link URL

☐ Link Text #5

Link URL

Action

[actions] ▼

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



+ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

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▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or [+ Create new form](#)

1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

[+ Add actions to links](#)

2nd Action

Set a timer ▼

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days ▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am

3rd Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

Select link(s):

☒ Link Text #1

Link URL

☐ Link Text #2

Link URL

☒ Link Text #3

Link URL

☒ Link Text #4

Link URL

☐ Link Text #5

Link URL

Action

Adjust Lead Score ▼

Adjust Lead Score by:

100

points

Save Workflow Rule

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Created on 3/24/2012 by System
Modified on 8/21/2012 by Donna Ream

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted

Austin Relocation Guide

or

Create new form

1st Action

Send an email

Austin Relo Guide - About Austin

or

Create new email

Add actions to links

2nd Action

Set a timer

Set timer based on a:

Wait at least:

Run on:

Run at:

Time delay

14

daysAny dayDateWeekdaysContact field

3rd Action

Send an email

Austin Relo Guide - About Austin

or

Create new email

Select link(s):

Link Text #1

Link URL

Link Text #2

Link URL

Link Text #3

Link URL

Link Text #4

Link URL

Link URL

Action

Adjust Lead Score

Adjust Lead Score by:

100

points

Save Workflow Rule

Link

Action Summary

Link Text #1

Adjust Lead Score by 100 points

Delete

Link Text #2

Adjust Lead Score by 100 points

Delete

Link Text #3

Adjust Lead Score by 100 points

Delete

[Add another action](#)

Stop this workflow when: (Optional)

[triggers]

Workflow Status

- ☒ Inactive
- ☐ Active

Is this workflow time-sensitive?

- ☐ Yes, inactivate the workflow on

4/22/2012

▼
- ☒ No

Can a Contact complete this workflow more than once?

- ☐ Yes, anytime conditions are met
- ☒ No, just one time

Can a Contact be enrolled in this workflow and others at the same time?

- ☒ Yes, the Contact can be in other workflows
- ☐ No, unenroll the Contact from all workflows
- ☐ It depends, unenroll them from these workflows

[list of workflows]

▼



New ▼

Search contacts, opportunities, campaigns, etc.

[Advanced](#)

[Recent Activity](#) | [Messages](#) | [Settings](#)

Dashboard

Contacts

Campaigns

Automation

Reports

Properties

Events

Created on 3/24/2012 by System
Modified on 8/21/2012 by Donna Ream

▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted▼

[list of existing forms]▼

or [Create new form](#)

Allow users to select one, several, or all forms.

Start this workflow when:

The Lifecycle Stage changes to▼

[list of Lifecycle Stages]▼

Start this workflow when:

Any of these tags are applied▼

Note: Users may create tags using the existing pattern

Start this workflow when:

A page is visited▼

Page's URL: ☒ equals ☐ contains

http://

Note: Include "http://" as default text.

Start this workflow when:

Lead Score equals or exceeds▼

Start this workflow when:

A community is toured▼

[list of communities]▼

Allow users to select one, several, or all communities.

Stop this workflow when:

A link is clicked▼

[list of links in this workflow]▼

Note: Clicking a link is a stop condition--it does not start a workflow.

Dropdown list should include link text (or alt text for linked images) and the URL.

[Automation Workflow name] [edit](#)

1st Action

Send an email

Existing emails:

[list of existing emails]

or [Create new email](#)

[Add actions to links](#)

1st Action

Set a timer

Note: Timer based on a time delay.

Set timer based on a:

Wait at least:

Run on:

Run at:

Time delay

14

days

Any day

9:30 am

DateWeekdaysContact field

1st Action

Set a timer

Note: Timer based on a date

Set timer based on a:

Run on:

Run at:

Time delay

4/22/2012

a date

9:30 am

between datesDateContact field

1st Action

Set a timer

Note: Timer based on a range of dates

Set timer based on a:

Run on:

Run at:

Time delay

4/22/2014

a date

9:30 am

between dates

4/22/2014

to

4/25/2014

DateContact field

1st Action

Set a timer

Note: Timer based on a Contact field

Set timer based on a:

Wait until:

Wait until:

Run at:

Time delay

14

days

a date

9:30 am

between datesDateContact field

1st Action

Add a tag

Tag(s) to add:

Note: Users may create tags using the existing pattern

1st Action

Remove a tag

Tag(s) to remove:

1st Action

Adjust Lead Score

Lead Score points:

1st Action

Change Lifecycle

Lifecycle stages:

[list of Lifecycle stages]

1st Action

Update a contact field

Contact fields:

[list of Contact fields]

Updated field value:

'Updated field value' shall be field appropriate. If a date field is selected, then provide date option. If a text string is selected, then provide a textbox. Etc.

1st Action

Assign Contact to a User

Users:

[list of Users]

We could also use a textbox and autofill as the user types.

NOTE: If we allow a round-robin distribution, then we may want to add that as an option here.

1st Action

Assign Contact to a User

Users:

[list of Users]

We could also use a textbox and autofill as the user types.

NOTE: If we allow a round-robin distribution, then we may want to add that as an option here.

1st Action

Notify User or Group

Users and/or Groups:

Notify by:

Email

Text message

Both email & text

Notify Account Executive

Consider allow User to input 'Account Executive' as an option in the textbox or textarea.

1st Action

Add a task

Attempt to follow the pattern already established when adding a task.

1st Action

Send a text message

Text message:

160 characters remaining

Limiting to 160 characters is not required if we use Twilio; however, it is good practice. After all, SMS means short message service

Dashboard

Contacts

Campaigns

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Reports

Properties

Events

Created on 3/24/2012 by System

Modified on 8/21/2012 by Donna Ream

Add Workflow

Edit Workflow

View Workflow

Copy Workflow

Delete Workflow

Workflow Report : Rockwood Reengagement

Select :

Rockwood Reengagement

View by :

11/08/2013

 to

21/11/2013

Sort by :

All Time

Form Submitted

Send Email

NewYork Market

50

+

Timer

Wait 10 days

15

+

Send Email

Market Analysis

20

+

LifeCycle

Opportunity

35

Workflow Summary

Total Contacts

120

Contacts Started

100

Contacts in process

50

Contacts Completed

40

Contacts Lost

10

Email Engagement

NewYork Market

Market Analysis

Process

Delivered

Opened

Clicks

Subscribed

Bounced

Lost

125

115

115

105

75

40

20

25

18

LifeCycle Stage of Contacts

Prospects (30)

Leads (30)

Opportunity (30)

Clients (10)

NewYork Market

Prospects (40)

Leads (30)

Opportunity (20)

Clients (10)

Market Analysis