Automation Module

Table of Contents

1. [Workflow List 2](#_Toc375220335)
2. [Add/Edit Workflow 3](#_Toc375220336)
3. [View Workflow 9](#_Toc375220337)

# Workflow List

**Functional Description**

This view displays one or more Automation Workflow in tabular form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Workflow Name | Link | If Campaign status = Active or Paused, then link to Automation Analytics page  Otherwise, link to Automation Workflow Builder |  |
| Status | Text | Options include:   1. Active 2. Draft 3. Paused |  |
| Contacts Started | Text | Display as number |  |
| Contacts In-process | Text | Display as number |  |
| Contacts Completed | Text | Display as number |  |
| Contacts Lost | Text | Display as number  Lost = Contacts that unsubscribed or returned hard-bounced |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Showing | Dropdown | Filters list of Workflows depending upon selection  Options include:   1. All Workflows 2. Active Workflows 3. Draft Workflows 4. Paused Workflows |  |
| Edit | Icon | Associated with a record |  |
| Delete | Icon | Associated with a record | Alert: “You’re about to delete 1 campaign. Are you sure you want to delete 1 campaign?”  Buttons: “Delete Campaign” and “Cancel” |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Workflow | Link |  |
| Edit Workflow | Link | If one Workflow is selected |
| View Workflow | Link | If one Workflow is selected |
| Save Workflow As… | Link | If one Workflow is selected |
| Delete Workflow | Link | If one or more Workflows is selected |

**Exceptions**

None

**Notes and Issues**

None

# Add/Edit Workflow

**Functional Description**

This view allows the User to create a new workflow or edit an existing workflow.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Workflow Name\* | Textbox & Text | Field displays as a textbox until a value is entered and saved  Default value to “Untitled Workflow ([date])”  Example: Untitled Workflow (1/1/2014)  May be modified inline  Once saved, the value is displayed as text |  |
| **Settings** | | | |
| Status\* | Dropdown | Options include:   1. Inactive (default) 2. Active |  |
| Is this workflow time-sensitive\* | Radio Buttons | Options include:   1. Yes, deactivate this workflow on 2. No |  |
| Inactivate workflow date | Date-picker | Display adjacent to the radio button ‘Yes, inactivate the workflow on’ | Required if radio button ‘Yes, deactivate this workflow on’ is selected |
| Can a Contact complete this workflow more than once\* | Radio Buttons | Options include:   1. Yes, anytime conditions are met 2. No, just one time |  |
| Can a Contact be enrolled in this workflow and others at the same time\* | Radio Buttons | Options include:   1. Yes, the Contact can be in other workflows 2. No, remove the Contact from all workflows 3. No, remove Contact from these workflows |  |
| Remove from workflows | Dropdown | Options include a list of workflows  Allow user to select one or more options with checkboxes | Required if radio button ‘No, remove Contact from these workflows’ is selected |
| **Trigger** | | | |
| Start this Workflow when\* | Dropdown | Options include:   1. A Contact is in a SmartSearch 2. A form is submitted 3. Lifecycle changes 4. Tags are applied 5. A Campaign is sent |  |
| SmartSearches | Dropdown | Display if Trigger = ‘A Contact is in a SmartSearch’  Options include all saved searches  Allow user to select one or more options with checkboxes |  |
| Forms | Dropdown | Display if Trigger = ‘A form is submitted’  Options include all active forms  Allow user to select one or more options with checkboxes |  |
| Lifecycles | Dropdown | Display if Trigger = ‘Lifecycle changes’  Options include all Lifecycle  User may select one value |  |
| Tags | Textbox | Display if Trigger = ‘Tags are applied’  Use live-search pattern to return tags as the User types |  |
| Campaigns | Textbox | Display if Trigger = ‘A Campaign is sent’ |  |
| **Actions** | | | |
| Action\* | Dropdown | Options include:   1. Send a campaign 2. Set a timer 3. Add a tag 4. Remove a tag 5. Adjust Lead Score 6. Change Lifecycle 7. Update a field 8. Assign to a User 9. Notify a User or Team |  |
| *Send an email* | | | |
| Campaigns\* | Dropdown | Options include all Campaigns  User may select one value |  |
| Links | Dropdown | Options include all links in Campaigns  User may select multiple values |  |
| Link Actions | Dropdown | Options include:   1. Add a tag 2. Remove a tag 3. Adjust Lead Score 4. Update a field 5. Notify a User or Team   User may select multiple |  |
| *Set a timer* | | | |
| Set timer based on a\* | Radio Buttons | Options include:   1. Time delay 2. Date |  |
| Wait at least | Textbox | Display if ‘Set timer based on a’ = ‘Time delay’ | Numeric  Required if radio button ‘Time delay’ is selected |
| Period | Dropdown | Display if ‘Set timer based on a’ = ‘Time delay’  Options include:   1. Minutes 2. Hours 3. Days 4. Weeks 5. Months | Required if radio button ‘Time delay’ is selected |
| Run on | Radio Buttons | Display if ‘Set timer based on a’ = ‘Time delay’  Options include:   1. Any day 2. Weekdays | Required if radio button ‘Time delay’ is selected |
| Run at | Textbox | Display if ‘Set timer based on a’ = ‘Time delay’ | Time  Required if radio button ‘Time delay’ is selected |
| Run on | Radio Buttons | Display if ‘Set timer based on a’ = ‘Time delay’  Options include:   1. Any day 2. Weekdays | Required if radio button ‘Time delay’ is selected |
| Run on | Radio Buttons | Display if ‘Set timer based on a’ = ‘Date’  Options include:   1. A date 2. Between dates | Required if radio button ‘Date’ is selected |
| A date | Date-picker | Display if ‘Run on’ = ‘a date’  Select a single date to perform this step | Required if radio button ‘Date’ is selected and radio button ‘a date’ is selected |
| Between dates | Date-pickers | Display if ‘Run on’ = ‘between dates’  Select a date range to perform this step | Required if radio button ‘Date’ is selected and radio button ‘between dates’ is selected |
| Run at | Textbox | Display if ‘Set timer based on a’ = ‘Time delay’ | Required if radio button ‘Time delay’ is selected |
| *Add a tag* | | | |
| Tag(s) to add\* | Textbox | Use live-search to return tags as the user types |  |
| *Remove a tag* | | | |
| Tag(s) to remove\* | Textbox | Use live-search to return tags as the user types |  |
| *Adjust Lead Score* | | | |
| Lead Score points\* | Textbox |  | Numeric  Positive or negative |
| *Change Lifecycle* | | | |
| Lifecycle\* | Dropdown | Options include all Lifecycle values |  |
| *Update a Field* | | | |
| Contact Fields\* | Dropdown | Options include all Contact fields |  |
| Field Value\* | Depends on Contact Field | Options depend upon the selected Contact Field |  |
| *Assign to User* | | | |
| Users\* | Textbox | Use live-search pattern to return values as the User types |  |
| *Notify a User or Team* | | | |
| Users and/or Team\* | Text area | Use live-search pattern to return values as the User types |  |
| Notify Account Executive | Checkbox |  |  |
| Notify by\* | Radio buttons | Options include:   1. Email 2. Text Message 3. Both email & text |  |
| **Stop** | | | |
| Stop this Workflow when | Dropdown | Options are the same as Triggers with the addition of ‘A Link is clicked’.  Options include:   1. A Contact is in a SmartSearch 2. A form is submitted 3. Lifecycle changes 4. Tags are applied 5. A link is clicked |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Back to list | Link | Returns user to Workflow List |  |
| Edit Workflow Name | Icon | Replaces Workflow Name with a textbox containing the Workflow Name |  |
| Save Workflow Name | Icon | Displays if ‘Edit Workflow Name’ selected  Saves the new name and replaces textbox with the new text |  |
| Cancel Editing Workflow Name | Icon | Displays if ‘Edit Workflow Name’ selected  Cancels editing and replaces textbox with original text |  |
| Settings | Icon | Reveals workflow settings |  |
| Delete | Icon | Applies to Actions  Deletes selection Action |  |
| Copy | Icon | Applies to Actions  Copies selected Action and pastes it below copied Action |  |
| Drag | Icon | Applies to Actions  Allows User to reorder Actions |  |
| Collapse/Expand | Icon | Applies to Trigger, Actions, and stop condition  Allows User to collapse or expand the selected item |  |
| Add Action | Link | Adds a new Action container in the applicable container |  |
| Create new search | Link | Applies to Form Trigger  Replaces view with Advanced Search |  |
| Create new form | Link | Applies to Form Trigger  Replaces view with Form Builder |  |
| Create new email | Link | Applies to Email Action  Replaces view with Campaign Builder |  |
| Add Actions to links | Link | Applies to Email Action  Allows User to add Actions to each link within the Campaign  Applicable Actions include:   1. Add a tag 2. Remove a tag 3. Adjust Lead Score 4. Update a field 5. Notify a User or Team |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Workflow | Link |  |
| Save Workflow As… | Link |  |
| Delete Workflow | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# View Workflow

**Functional Description**

This view allows the User to view a workflow that is Active or has been Active.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Workflow Name | Dropdown | Display Workflow Name as text with an adjacent icon to dropdown other Workflows |  |
| Status | Text | Display adjacent to the Workflow Name  Note whether a workflow is Active or Inactive |  |
| Time Period | Dropdown | Options include:   1. All (default) 2. Last 30 days 3. Last 60 days 4. Last 90 days 5. Custom |  |
| Custom Time Period | Date Pickers | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| **Workflow Summary** | | | |
| Sequence Steps | Text & Icons | Display Workflow sequence in order with a combination of text and icons  Above Icon: Textual description of Trigger or Action type. Example: Form Submitted  Below Icon: Textual description of actual Trigger or Action, such as the name of the form or campaign.  If there are more steps than can be displayed within the viewport, use a carousel to allow the user to scroll forward and backwards through the steps |  |
| **Workflow Analytics** | | | |
| Contacts Started | Text | Total number of Contacts that have entered the Workflow  Do not include Contacts with hard-bounces |  |
| Contacts In-process | Text | Total number of Contacts currently in Workflow  Do not include Contacts with hard-bounces |  |
| Contacts Lost | Text | Total number of Contacts that have unsubscribed from the Workflow  Do not include Contacts with hard-bounces |  |
| Contacts Finished | Text | Total number of Contacts that have completed the Workflow or met the stop condition |  |
| **Engagement** | | | |
| Workflow Name | Bar Graph & Text (in table) | Applies to each Campaign in the Workflow  Display in order from the Workflow |  |
| Delivered | Bar Graph & Text (in table) | Applies to each Campaign in the Workflow  Display in order from the Workflow |  |
| Opened | Bar Graph & Text (in table) | Applies to each Campaign in the Workflow  Display in order from the Workflow |  |
| Clicked | Bar Graph & Text (in table) | Applies to each Campaign in the Workflow  Display in order from the Workflow |  |
| Unsubscribed | Bar Graph & Text (in table) | Applies to each Campaign in the Workflow  Display in order from the Workflow |  |
| Complained | Bar Graph & Text (in table) | Applies to each Campaign in the Workflow  Display in order from the Workflow |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Back to list | Link | Returns user to Workflow List |  |
| Time Period\* | Dropdown | Options include:   1. All (default) 2. Last 30 days 3. Last 60 days 4. Last 90 days 5. Custom |  |
| Custom Time Period | Date Pickers | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates | Required if ‘Custom’ is selected as the value for ‘Time Period’ |
| Workflow Name | Dropdown | List of all workflows |  |
| Settings | Icon | Reveal settings |  |
| Save Settings | Link |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Edit Workflow | Link |  |
| Save Workflow As… | Link |  |
| Delete Workflow | Link |  |

**Exceptions**

None

**Notes and Issues**

None