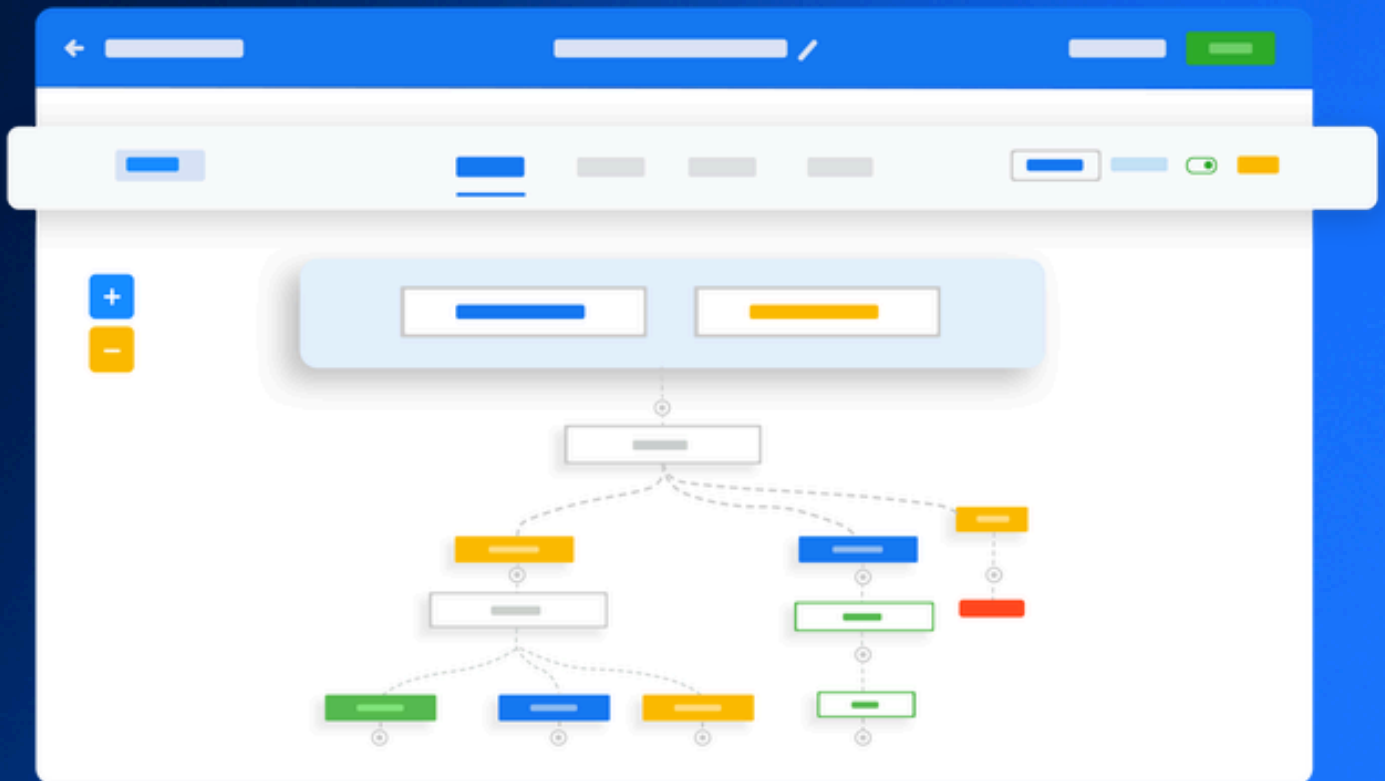


REFERENCE GUIDE

Automation Workflows

Automate follow-up, step by step



Workflows List and Folders

What It Is

Search for Workflows. The list shows each workflow with its name and status, and folders keep related workflows together so you can find them later.

How It Works For Your Business

- Search for Workflows to reach the landing page and your list.
- Start with Build using AI, Browse Templates, or Create Workflow.
- Status is Draft (saved, not running) or Published (live and working).
- Click Create Folder to add a folder, and open it to make folders inside it.
- Expand a row with its arrow to find Stats, and use search and filters on long lists.

Workflows List and Folders – Tips & Guidelines

Tips

- Name folders so you will recognize them in six months.
- Keep folders two or three levels deep at most.
- Deleting a folder moves its workflows up one level, not away.
- Check the status first when you wonder if a workflow is live.

DO

- Group workflows by purpose
- Use clear folder names
- Check Draft or Published
- Try a template to learn

DON'T

- Bury workflows in deep folders
- Use vague names like Stuff
- Assume Draft means running
- Fear deleting a folder

Builder Canvas and Controls

What It Is

The builder is an open canvas where you place a trigger and then add steps. A few controls handle saving, testing, going live, and finding your way around.

How It Works For Your Business

- Choose Create Workflow, then Start from Scratch, to open a blank canvas.
- Drag empty space to pan, and use the plus button on a line to add a step between others.
- Drag a step by its six-dot handle to keep the canvas neat.
- Use Save (red dot means unsaved), Test Workflow, the Draft and Publish toggle, and History.
- Use Fit to Screen, zoom, and the minimap; the tabs are Builder, Settings, Enrollment History, and Execution Logs.

Builder Canvas and Controls – Tips & Guidelines

Tips

- Glance at Save before you leave a workflow.
- Undo only remembers the current editing session, so rely on History for older versions.
- Confirm shortcuts such as Shift and W on your screen, since versions differ.
- Tidy your canvas as you build so branches stay readable.

DO

- Watch for the red dot
- Use Fit to Screen often
- Click the minimap to jump
- Test before you publish

DON'T

- Leave with unsaved changes
- Refresh and expect undo
- Publish a half-built flow
- Stack steps in a pile

Triggers and Filters

What It Is

A trigger is the event that sends a contact into a workflow. Filters are rules that make the trigger specific so only the right contacts enter.

How It Works For Your Business

- Click Add New Trigger, then search by name or browse categories like Contact, Events, and Appointments.
- Contact Created fires when a new contact lands; Form Submitted fires when a form is filled out.
- Customer Booked Appointment fires on a booking; Pipeline Stage Changed fires when a deal moves.
- Click Add Filter to narrow a trigger; filter names differ for each trigger.
- Name the trigger, click Save Trigger, and add more triggers if you want more than one way in.

Triggers and Filters – Tips & Guidelines

Tips

- With no filter, a trigger fires for everything that matches, such as every form.
- Use filters for the specific form, calendar, pipeline, or stage.
- Ask what happens first in real life, then pick that trigger.
- Two triggers mean the workflow starts when either happens.

DO

- Add a filter every time
- Name triggers clearly
- Save before moving on
- Read filter names on screen

DON'T

- Leave filters empty
- Pick a trigger by guessing
- Skip Save Trigger
- Reuse one vague name

Email and SMS Actions

What It Is

Email and SMS actions send messages from your workflow. Custom values fill in each contact's own details so one message feels personal to everyone.

How It Works For Your Business

- Click the plus, open Communication, and choose Send Email or Send SMS.
- For email, set From Name, From Email, and Subject, then write the body or load a saved template.
- For SMS, type a short message, and add an image if you want it to go out as an MMS.
- Use the custom values picker to add details like the first name.
- Rename the action, click Save Action, and click the box on the canvas to edit it later.

Email and SMS Actions – Tips & Guidelines

Tips

- Texting needs a phone number set up in your account.
- Keep texts to one idea and read them twice before saving.
- Plain, short emails often work better than heavy designs.
- Keep the workflow in Draft while you practice so nothing sends.

DO

- Use the first name
- Keep subject lines honest
- Rename every action
- Message people who expect you

DON'T

- Pack five ideas in a text
- Publish before testing
- Leave actions unnamed
- Skip a read-through

Wait, If/Else, and Go To

What It Is

Internal Tools add timing and decisions. Wait pauses a workflow, If/Else splits contacts onto paths, and Go To and Remove From Workflow control where contacts end up.

How It Works For Your Business

- Click the plus and open Internal Tools to find Wait, If/Else, Go To, and Remove From Workflow.
- Wait can use a time delay, an event or appointment time, a contact reply, or a condition.
- If/Else checks things like a tag, a contact field, or an appointment detail.
- You get a Yes and a No path, and Add Branch gives a third one; rename each path.
- Remove From Workflow takes contacts out; check what Go To offers on your screen.

Wait, If/Else, and Go To – Tips & Guidelines

Tips

- Contacts at a Wait step are paused, not removed.
- Write your question in plain English, then build the condition to match.
- Appointment filters show up with appointment triggers.
- Most beginner workflows only need Wait, If/Else, and Remove.

DO

- Name If/Else like a question
- Rename each path
- Use Wait for reminders
- Remove people who finished

DON'T

- Send messages back to back
- Use long path names
- Guess what Go To does
- Keep nudging people who booked

Contact and Opportunity Actions

What It Is

These actions update your records for you. They tag contacts, change fields, assign people, move deals, add notes and tasks, and alert your team.

How It Works For Your Business

- Add Contact Tag and Remove Contact Tag label contacts so other steps can act on them.
- Update Contact Field changes a field, including date fields.
- Assign to User hands a contact to a team member, with round-robin options.
- Create or Update Opportunity sets the pipeline, stage, value, and status; Add Note and Add Task record follow-ups.
- Send Internal Notification alerts a user, the assigned user, or chosen users by email, in-app, or SMS.

Contact and Opportunity Actions – Tips & Guidelines

Tips

- Tags make good If/Else conditions later in the workflow.
- Check your pipeline and stage choices before saving an opportunity action.
- Notify the assigned user when a human needs to jump in.
- Option names can vary, so read them off your screen.

DO

- Tag contacts as they move
- Use clear tag names
- Notify the right person
- Add tasks for follow-up

DON'T

- Create tags with random names
- Overwrite fields blindly
- Notify everyone every time
- Skip the pipeline check

Settings, Testing, and Logs

What It Is

Before you go live, tune the Settings tab, test with a contact, and publish. Afterward, Enrollment History and Execution Logs show who went through and what happened.

How It Works For Your Business

- The Settings tab has Allow Re-entry, Allow Multiple Opportunities, and Stop on Response.
- It also covers timezone, a time window for days and hours, sender defaults, and pausing on certain dates.
- Test Workflow runs a chosen test contact through, and errors flagged on action nodes should be fixed first.
- Draft means off; Publish makes it live. Saving alone does not publish.
- Enrollment History shows contact statuses; Execution Logs show each action's status and a View Details link.

Settings, Testing, and Logs – Tips & Guidelines

Tips

- Test with a contact that is really you before real people enter.
- Fix flagged errors before you publish.
- Use the logs to find a stuck contact, then jump to that action in the Builder.
- Check settings like re-entry on purpose, not by default.

DO

- Test every workflow first
- Set a time window
- Read the logs when stuck
- Fix flagged errors

DON'T

- Publish without testing
- Ignore error flags
- Forget about re-entry
- Treat Save as Publish

Templates and the AI Builder

What It Is

Templates and AI help you start faster. A template loads a finished workflow to edit, and the AI builder drafts one from a plain-words description.

How It Works For Your Business

- Create Workflow, then Select from Template, lets you filter by category or search by keyword.
- Use the eye icon to preview a template, then Continue to load it into the builder.
- Inside the builder, the Workflow AI icon lets you describe what you want and see a list of triggers and actions.
- Describe this Workflow explains an existing workflow in plain words.
- Build using AI on the landing page starts from a description, and the AI builder keeps its own version history.

Templates and the AI Builder – Tips & Guidelines

Tips

- Preview a template before loading it.
- Always review what AI generates before publishing.
- Use AI to explain a workflow you inherited.
- The AI options can be hidden if turned off in your settings.

DO

- Preview before you load
- Edit every template
- Describe goals plainly
- Review AI drafts

DON'T

- Publish AI output untested
- Assume templates fit as is
- Write vague AI prompts
- Skip your own names

Goals, Webhooks, Stats, Versions

What It Is

Advanced tools connect and measure your workflows. Goals end or hold contacts when an outcome happens, webhooks and code move data, and stats and versions keep things safe.

How It Works For Your Business

- Goal Event types include Form Submitted, Payment Received, Tag Added, Email Events, and Trigger Link Clicked.
- A goal can end the workflow, continue anyway, or wait until the goal is met.
- Custom Webhook sends data out with a method, URL, headers, and body; an Inbound Webhook trigger starts one.
- Custom Code runs JavaScript or Python with input data and an output object, and has a Generate with AI button.
- Stats show sent, delivered, opened, and clicked per action; History restores versions, and folder permissions limit who can edit.

Goals, Webhooks, Stats, Versions – Tips & Guidelines

Tips

- Use goals to stop messages once a contact has done what you wanted.
- Test webhooks and code on a test contact first.
- Restore an older version from History if a change goes wrong.
- Set folder permissions for view-only or full control.

DO

- Use goals to stop nudges
- Test code on a test contact
- Check stats per action
- Set folder permissions

DON'T

- Edit live flows untested
- Paste unknown code
- Ignore error notices
- Give everyone full control

Key Terms Glossary

Workflow

A set of steps your software runs automatically when something happens.

Trigger

The event that sends a contact into a workflow.

Filter

A rule that narrows when a trigger fires.

Action

A single step in a workflow, like sending an email.

Draft

A saved workflow that is not running yet.

Published

A live workflow that is running for real contacts.

Custom value

A placeholder that fills in real details, like a first name.

If/Else

A step that splits contacts onto paths based on a rule.

Wait

A step that pauses a contact before the next step.

Enrollment History

A tab listing which contacts went through the workflow.

Execution Logs

A tab showing what each action did and its status.

Goal Event

A step that ends or holds contacts once an outcome happens.

Getting Help

Your software changes over time, so a button, tab, or option name may look a little different from what you see here. If something does not match, check the in-app help for Workflows or look for the option with the closest name.