BluWave CRM- Workflows

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1. Introduction

1.1 Why is Automation of Sales Marketing Process Important?

Businesses cannot achieve ROI from CRM by renting a CRM system and feeding in data. Process automation is one method of reaping rewards from CRM.

The following benefits accrue from process automation:
- Consistent performance from the sales team
- Improved productivity
- Repeatable successes
- Improved responsiveness to customers to enhance customer satisfaction levels

Often the sales and marketing processes of a business are the least documented and structured areas of the business.
Customers who focus on the processes will find areas that can be automated. This frees up sales staff to concentrate on the "Art" of selling that is not yet easy to automate, spending time developing deal propositions, discussing customer requirements and negotiating and closing sales.

1.2 What types of processes can be automated in sales and marketing?

- Automation of tedious manual processes e.g. feeding of web enquiries directly into your CRM database. Built into BluWave CRM is a free automated web service which allows all customers to push their web site enquiries directly into the BluWave CRM database.
- Business processes to assign resources based on an event e.g. automate the allocation of leads from a website based on a product or region selection. For example, you can use the new workflow function to trigger an email and a task for the salesperson to whom you have routed the lead.
- Triggering of client facing events e.g. personalised responses to a sales enquiry. For example, at BluWave Software we have applied the BluWave Workflow function for our customers who apply for the 30 day free trial. We have an automated trial user campaign that sends a weekly personalised email directly to the trial user "from the salesperson" to indicate the remaining days on the trial but also to deliver a message about a function and the benefits thereof. The system has 4 automated messages triggered on a timed basis over the duration of the trial. “I find this is a very effective method to engage with new leads, they respond to my emails with queries and things they have queries about, and this commences the sales engagement process" (Tania Cooke-Tonnesen)
- Automated prompts on customer anniversary dates e.g. contract renewals or customer equipment service prompts.
- Prompts to the sales team to monitor critical processes. For example, with the new workflow process in BluWave you can trigger an internal email to senior manager when a new high value opportunity is raised in the system.

1.3 What could result from a workflow?

Workflows can only be set up to be triggered in some way, either through creation, editing or by applying to a rule.

There are **four different outcomes (actions)** for a workflow:

- An Immediate Task (Not applicable to Leads) - a task for a staff member that is scheduled for the same day the workflow is triggered.
- A Scheduled Future Task (Not applicable to Leads) - a task for a staff member that would be scheduled for some time in the future after the workflow is triggered.
- An Immediate Email- an email that is sent immediately after the workflow is triggered.
- A Scheduled Future Email- an email that is scheduled to be sent some time in the future after the workflow is triggered.

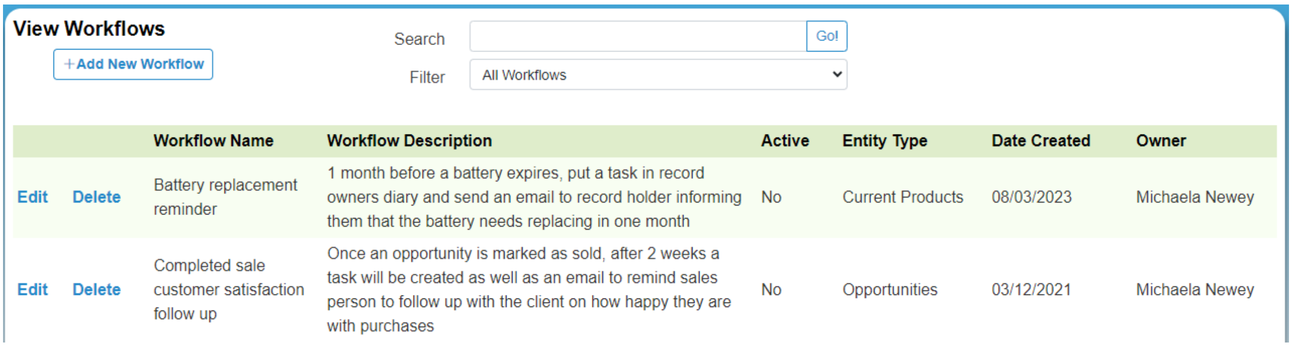
An example of a campaign would be that once a company is added to the system:

1. an introduction email is sent immediately,
2. two days later a brochure could be sent with information regarding a new product range
3. a task gets created for the rep to give the client a call to follow up on the brochure

In other words, a series of tasks and emails can be set up to automatically generate and send at specified times.

2. How to Reach the Workflow Setup

Click on the **System Setup** menu at the top, and then choose the **Workflow** option.



		Workflow Name	Workflow Description	Active	Entity Type	Date Created	Owner
Edit	Delete	Battery replacement reminder	1 month before a battery expires, put a task in record owners diary and send an email to record holder informing them that the battery needs replacing in one month	No	Current Products	08/03/2023	Michaela Newey
Edit	Delete	Completed sale customer satisfaction follow up	Once an opportunity is marked as sold, after 2 weeks a task will be created as well as an email to remind sales person to follow up with the client on how happy they are with purchases	No	Opportunities	03/12/2021	Michaela Newey

By clicking on the option, the user will by default see the **View Workflows** screen, this shows all the workflows setup on the system. The user will also be able to see if their active or not.

2.1 Creating/Editing a Workflow

- To add a new workflow- Click on the **+ Add New Workflows** icon at the top left hand-side of the screen.
- To edit a workflow- Click on the relevant **Edit** link on the left-hand side of each workflow or on the workflow name.
- To delete a workflow- Click on the relevant **Delete** link on the left-hand side of each workflow.

Creating a new workflow or editing an existing workflow, the user will be able to navigate through the workflow setup wizard.

There are 4 steps in the wizard. We will discuss each of these steps in more detail.

2.2 Stopping Email Campaigns

Before initiating any workflows, it is important to understand how to stop the email campaigns should the customer request it. This is required by the Consumer Protection Act.

Workflow emails can be stopped in the following ways:

2.2.1 De-Activating the workflow

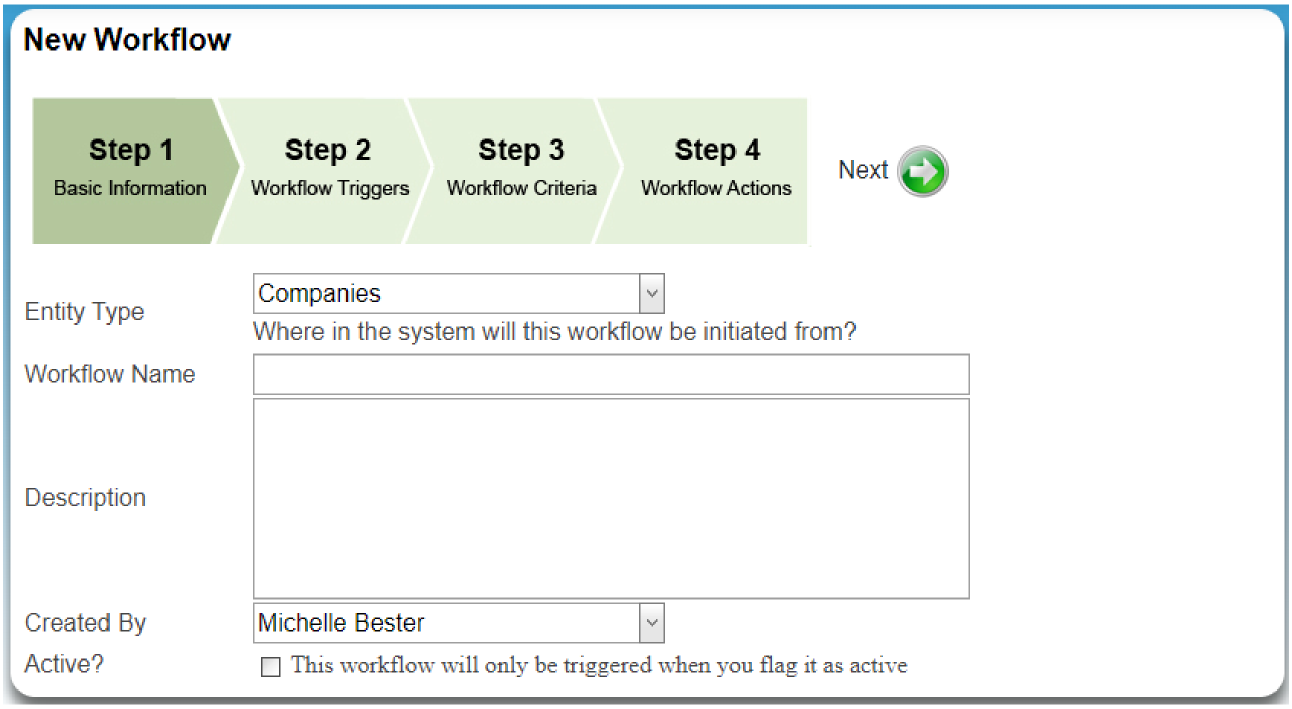
(See Step 1 of the Wizard)

2.2.2 Unsubscribing the Contact from the Edit Contact screen.

Uncheck the **Unsubscribe** checkbox on the **Edit Contact** screen.

3. Workflow Wizard- Step 1: Basic Information

When creating a new workflow or editing existing workflows, the user will always start on step 1 of the workflow wizard.



On this step the user will first choose the **Entity Type** (data set) the workflow will be based on.

3.1 Entity Type

Workflows can currently only be set up using information on 4 portions of the system (entities): Leads, Companies, Opportunities and Current Products.

Once the entity is set, it cannot be changed later. (If a mistake was made regarding the entity, the user should create a new workflow and delete the incorrect workflow)

Below are more details of how workflows can be utilized in each section:

3.1.1 Leads

- Leads can be created manually or fed from our free web service which pushes enquiries directly from your website to the leads area in CRM.
- Use lead workflows to trigger marketing literature fulfilment. E.g. If a lead requests a brochure or pricelist from the website, the system can automate the delivery of the required information.

3.1.2 Companies

- Adding a new prospect/customer – The system can be setup to email the sales rep assigned to the company which could be useful if there is an internal salesperson who captures clients on CRM. Automated tasks can also be created for the rep to follow up on new clients that have been allocated to them.

- When a new client has been added, you can also create a series of marketing emails that trigger over a period of time to furnish the new client with information such as company profile, product and service range etc.
- Editing Company Information – Editing any of the company fields and user defined fields can also trigger emails and tasks from the system. For example, changing a customer type from a B account to an A account can send an email to the sales manager alerting them of this change in client type. You can also have User Defined Fields in BluWave that are important to specific staff members and if this value change the system would then email or create specific tasks for those sales reps.

3.1.3 Opportunities

- Adding a new opportunity- The system can send emails to internal or external contacts with information regarding the opportunity or relevant brochures.
- Editing an opportunity- Emails and Tasks can also be created and send as the opportunity is moved from one sales status to another.
- A reminder task or email can also be set up when an expected order date is approaching.

3.1.4 Current Products

- A reminder based on the expiry date could be set, i.e. Creating a Scheduled Task or sending a Future Email to let someone know that a renewal date is approaching.

3.2 Workflow Name

The **Workflow Name** is a short and unique reference to this specific workflow being set up.

3.3 Description

The **Description** will allow the user to describe what the workflow is for and what the outcome should be. This description is displayed on the Workflow View screen. (This helps so that the user doesn't need to open each workflow to remember what was set up.)

3.4 Active?

At the bottom of the screen the user will be able to **Activate** or **De-Activate** the workflow by checking or unchecking the Check box.
(NB: Leave the workflow as inactive for setup. Activate it once all has been setup correctly especially for immediate emails and tasks.)

Click on the **Next** arrow to continue to the next step.

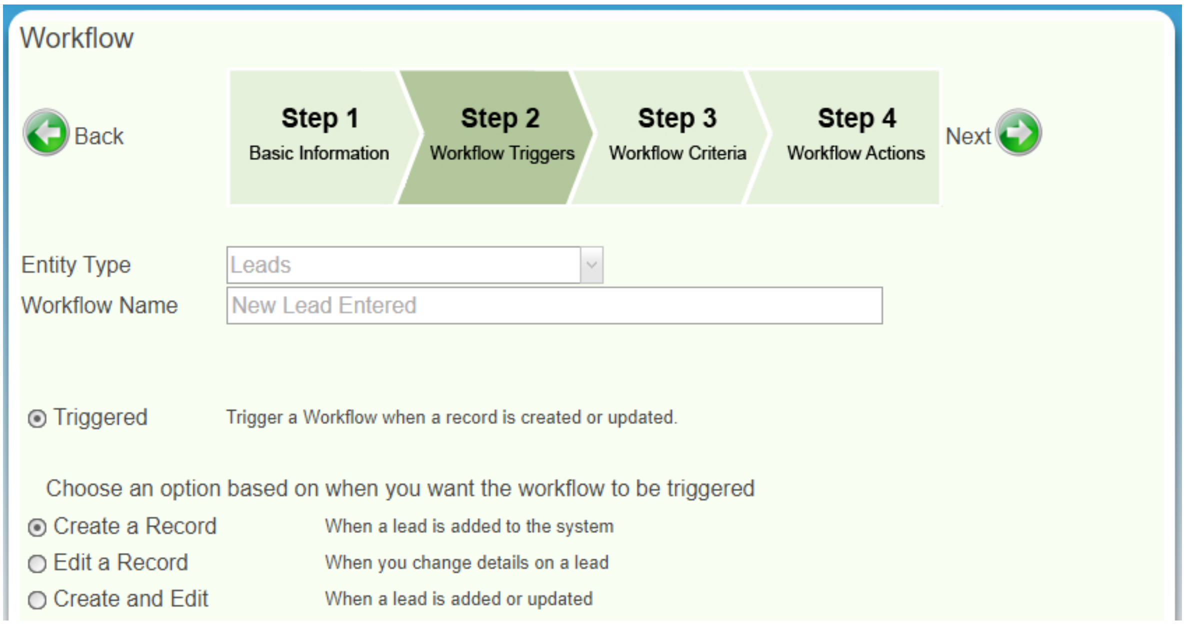
4. Workflow Wizard- Step 2: Workflow Triggers

This step allows the user to choose **how the workflow should be triggered** i.e. what condition must be met to initiate the workflow tasks and emails.

4.1 Workflow triggers for Leads, Companies & Opportunities

For Leads, Companie and Opportunities workflows can be triggered on:

- Create
- Edit
- Create & Edit

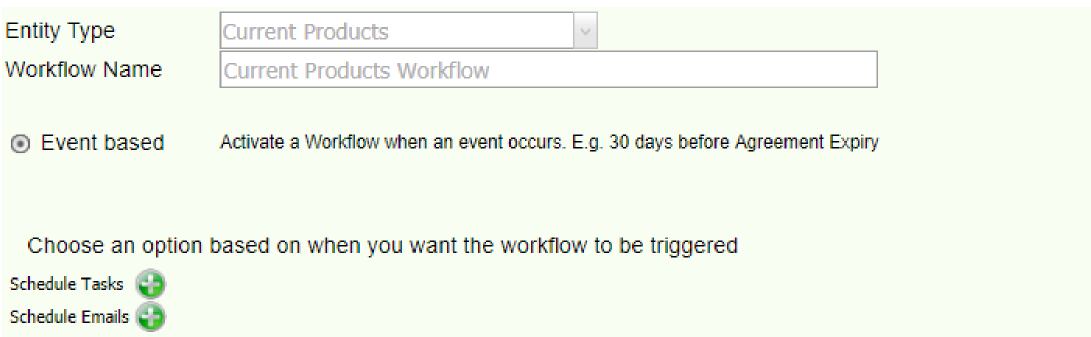


4.2 Workflow Triggers for Current Products

The **Current Product workflows work on events**, which means that the workflow can only be triggered based on the date fields used on the current product screen.

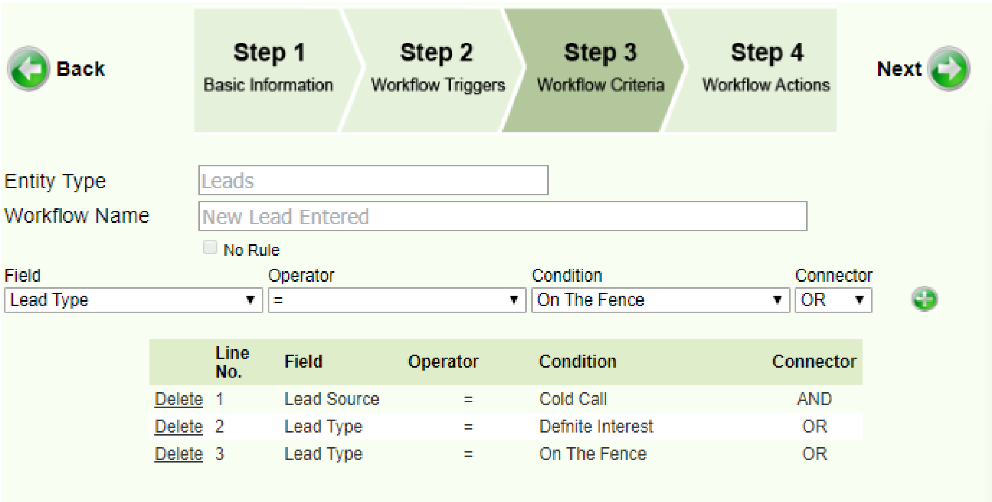
i.e. if an end date is 3 months away, an email could be sent to the client as a reminder that the renewal date is approaching.

Only scheduled tasks and emails can be set up for Current Products.



Click on the **Next** arrow to continue to the next step.

5. Workflow Wizard- Step 3: Workflow Criteria



These criteria are rules that are set that should also be met before the workflow will be triggered.

A rule is not required; only create a rule if you only want a workflow to be triggered if and when a certain condition is met.

i.e. The workflow should only send an email to the rep if the source of the lead is equal to Cold Call. (see the first line rule on the example below)

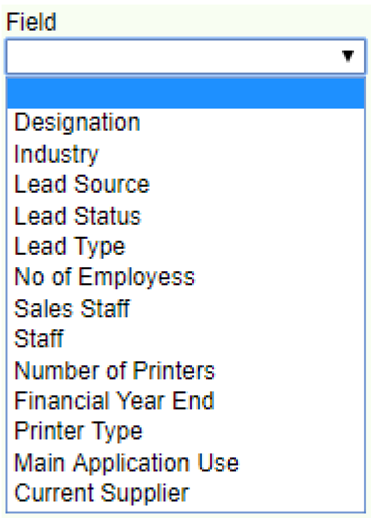
There are a few things to consider when adding rules to a workflow:

5.1 The Field

For each entity type there are different **Fields** that can be used to validate rules.

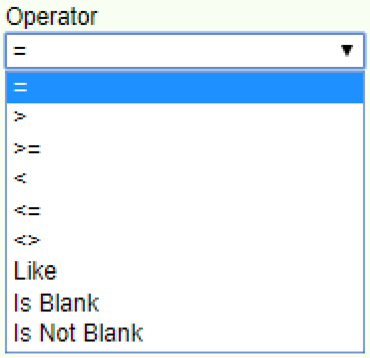
This will tell the system what field to look at when validating the information.

i.e. Should the condition field entry be associated with a specific Industry or Lead Type?



Example of the Lead Fields

5.2 The Operator



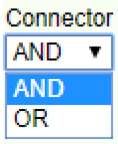
In the **Operator field** the user can choose what the relationship should be between the field and the condition field entry.

i.e. should the Lead Source be = to Cold Call or <> (Not) a Cold Call.

5.3 The Condition

The **Condition field** states what the **Field** should be validated against; this field would either allow the user to type in or select an option from the dropdown list.

5.4 The Connector



The **Connector** will tell the system if the rules should all be met or if only some of the rules should be met.

5.5 Setting up Rules

NB: Think of the rules in a logical manner. When looking at the example below, you will notice that the first rule absolutely should be met (because of the **AND connector**), but the system will only trigger the workflow if either of the Lead Types are chosen (because of the **OR connector**).

In other words:

The outcome of the workflow should only be triggered if the Lead Source is “Cold Call” AND the Lead Type is either “Defnite Interest” or “On The Fence”.

	Line No.	Field	Operator	Condition	Connector
Delete	1	Lead Source	=	Cold Call	AND
Delete	2	Lead Type	=	Defnite Interest	OR
Delete	3	Lead Type	=	On The Fence	OR

PLEASE NOTE: Dropdown fields can NEVER be equal to two options at the same time, because you can only make one selection at a time.

i.e. The Lead Source can never be “Cold Call” and “Networking” at the same time, only one of the two. (See Examples below)

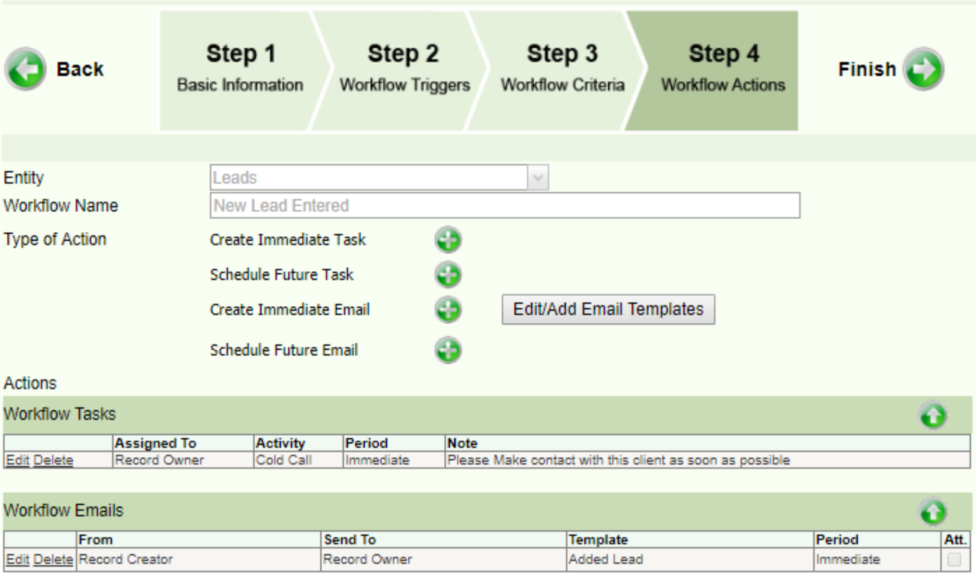
	Line No.	Field	Operator	Condition	Connector
Delete	1	Lead Source	=	Cold Call	AND
Delete	2	Lead Source	=	Networking	AND

	Line No.	Field	Operator	Condition	Connector
Delete	1	Lead Source	=	Cold Call	OR
Delete	2	Lead Source	=	Networking	OR

Click on the **Next** arrow to continue to the next step.

6. Workflow Wizard- Step 4: Workflow Actions

Workflow Actions are the **outcomes** that will result from the workflow being triggered. To add action to the workflow, click on the **green plus** icons next the appropriate option.

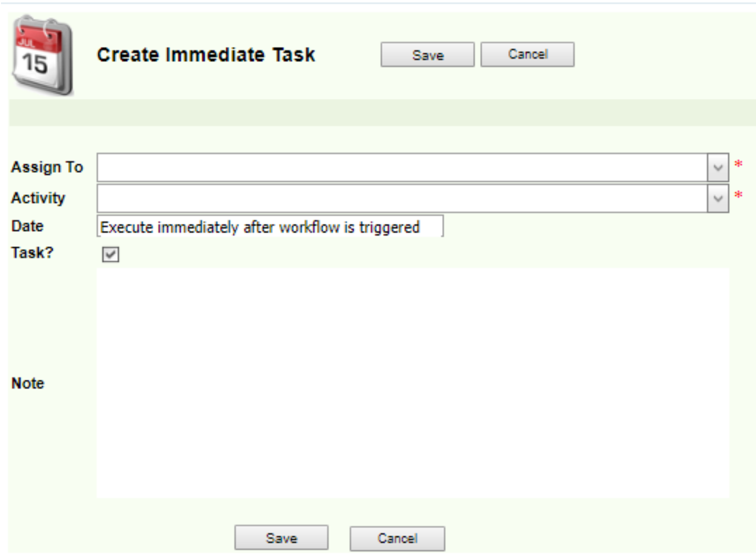


As stated previously, there are 4 outcomes:

1. An Immediate Task
2. A Scheduled Future Task
3. An Immediate Email
4. A Scheduled Future Email

We will now discuss each one in detail.

6.1 An Immediate Task (Not applicable to Leads)



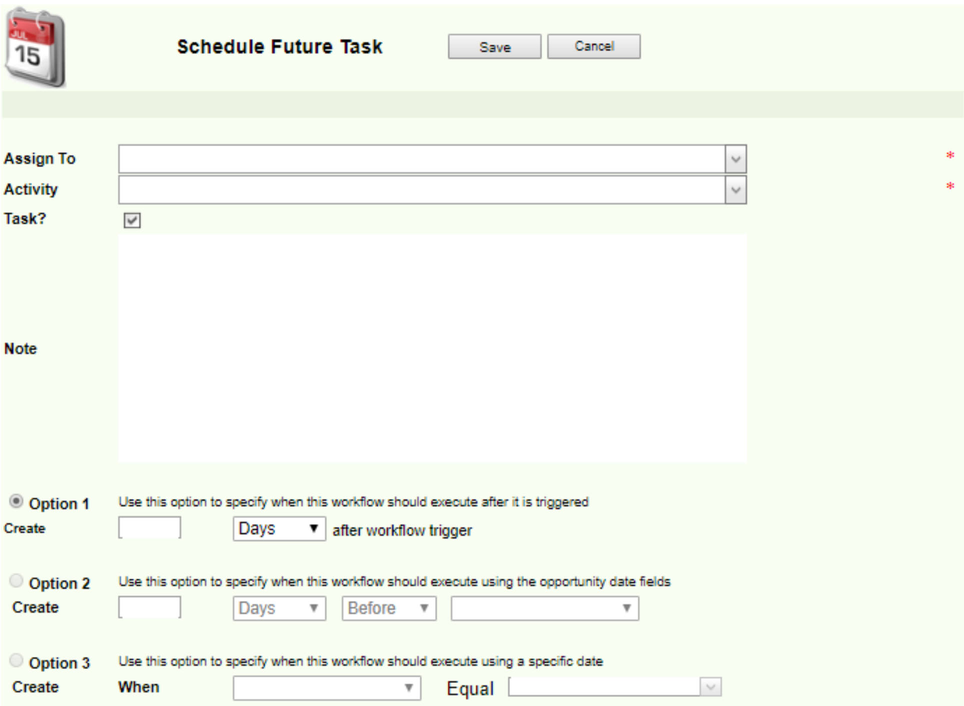
This is a task that gets created immediately after the workflow is triggered.

- The task would need to be **assigned** to a user (sales staff).
- The **activity type** that should be created can be selected. i.e. a telephone call or client visit.
- It can only be a **task** (the Task? Checkbox cannot be unchecked).
- The **notes** of the activity can also be typed in at this stage.

When clicking on **Save**, the system returns to Step 4 of the workflow wizard.

6.2 A Scheduled Future Task (Not applicable to Leads)

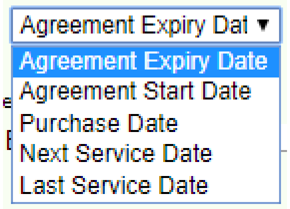
These tasks will be created for future dates, based on certain options.



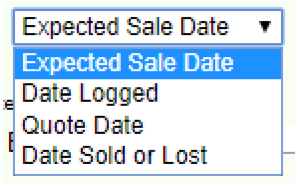
6.2.1 The options are as follows:

6.2.1.1 Option 1: Task will be scheduled for a certain amount of days or months after the workflow is triggered. (Applicable to all entities)

6.2.1.2 Option 2: Task will get created a certain number of days before/after a specific fields' date value. (This is only applicable on the Opportunities and Current Products entity type)



Fields for Current Products



Fields for Opportunities

6.2.1.3 Option 3: Task will get created when a specific date field equals a specific date entered. (This is only applicable on the Opportunities and Current Products entity type)

The same activity entries will be needed for future tasks as for immediate tasks:

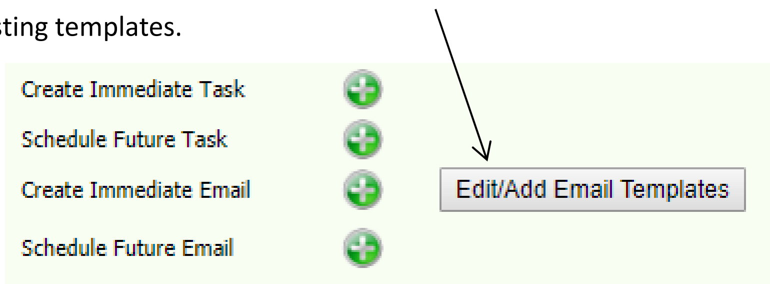
- The task would need to be **assigned** to a user (sales staff).
- The **activity type** that should be created can be selected. i.e. a telephone call or client visit.
- It can only be a **task** (the Task? Checkbox cannot be unchecked).
- The **notes** of the activity can also be typed in at this stage.

When clicking on **Save**, the system returns to Step 4 of the workflow wizard.

6.3 An Immediate Email

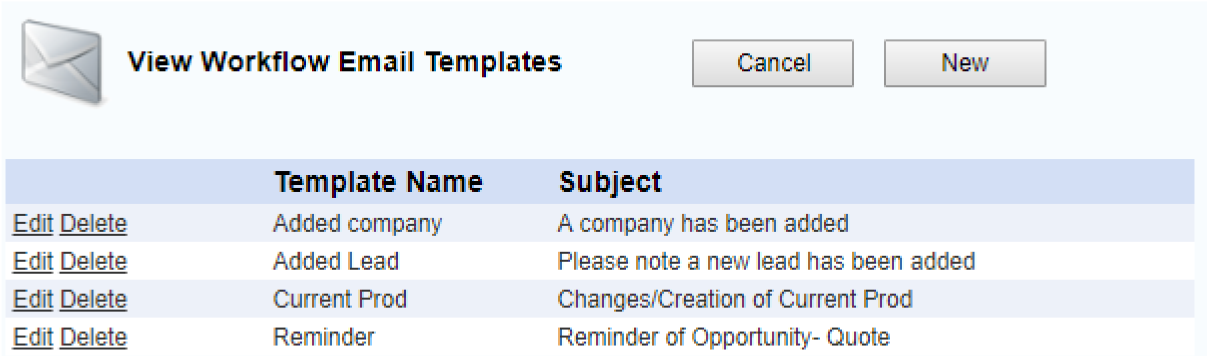
6.3.1 How to add and edit an email template

Before an email can be sent by the system, the system should first know what email should be sent. To do this the user should first click on the **Edit/Add Email Template** button in order to create new email templates or edit existing templates.

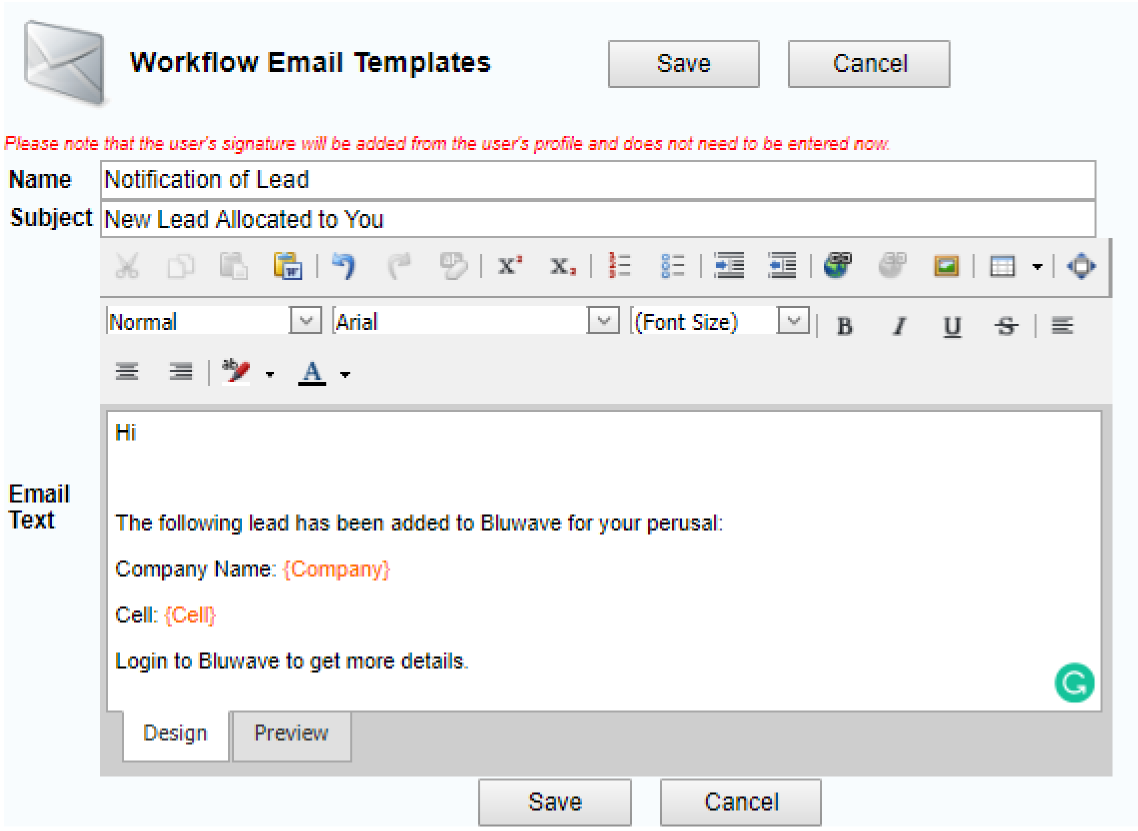


Clicking on the **Edit/Add Email Templates** button will show the user the templates that are already added to the system. To add a new template, click on the **New** button.

To return to Step 4 of the Workflow wizard, click on the **Cancel** button



Clicking on **New** will allow the user to add a new email template.



- The **Name** is a unique reference to the email template being created or edited.
- The **Subject** is the subject line that will be inserted in the email when sent.
- The **Email Text** will allow the user to type an email that should be sent. There are certain keywords that can be used in the email text portion that will be substituted with the actual information of the entity type (data set). A list of these will be added at the back of this manual.

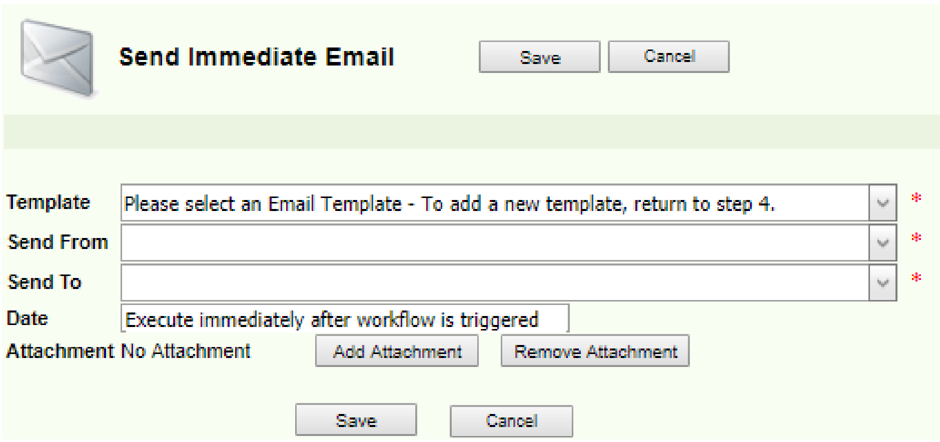
Clicking on **Save** will return the system to the **View Email Templates** screen.

6.4 Setting up the immediate email

From the **View Email Templates** screen**,** the user would be able to click on **Cancel** to return to Step 4 of the Workflow wizard.

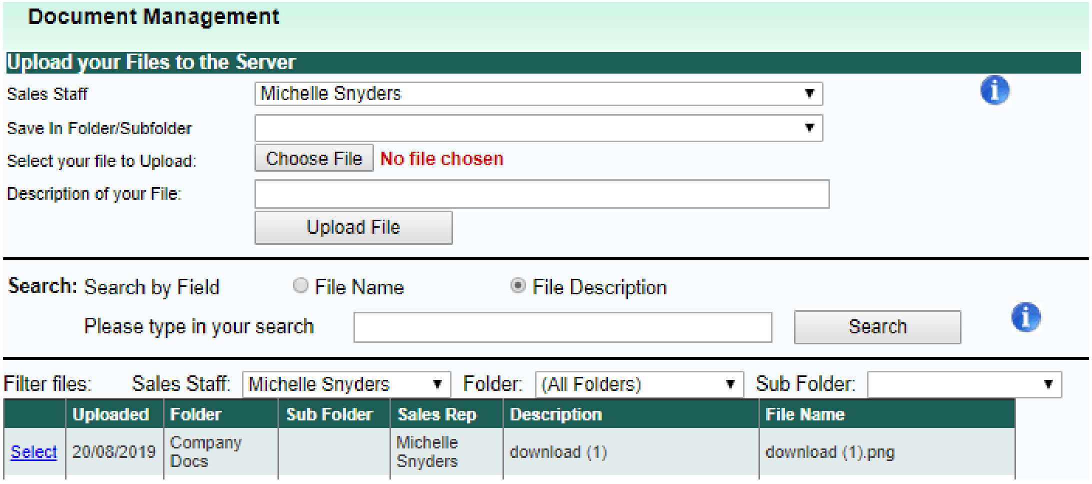
After the email template is created, the email sending specifications can be set up.

On Step 4 of the Workflow wizard, click on the green plus next to **Create Immediate Email**.



- Start by selecting the appropriate email template already created from the **Template dropdown field.**
- In **Send From**, select who you would like the email sender to be.
  - The user would be able to choose from the sales staff added to the system,
  - or the contact associated with the record that triggered the workflow,
  - or the record creator (sales staff that triggered the workflow),
  - or the record owner (sales staff associated with the record that triggered the workflow).
- **Send To**, select who the email should be sent to when the workflow is triggered. (The same Send From options applies).
- **Attachment,** an attachment can be attached to the email, and loaded by clicking on the Add Attachment button.
  - The **document management** screen will open, either upload a new document or select one that is already loaded to the server.

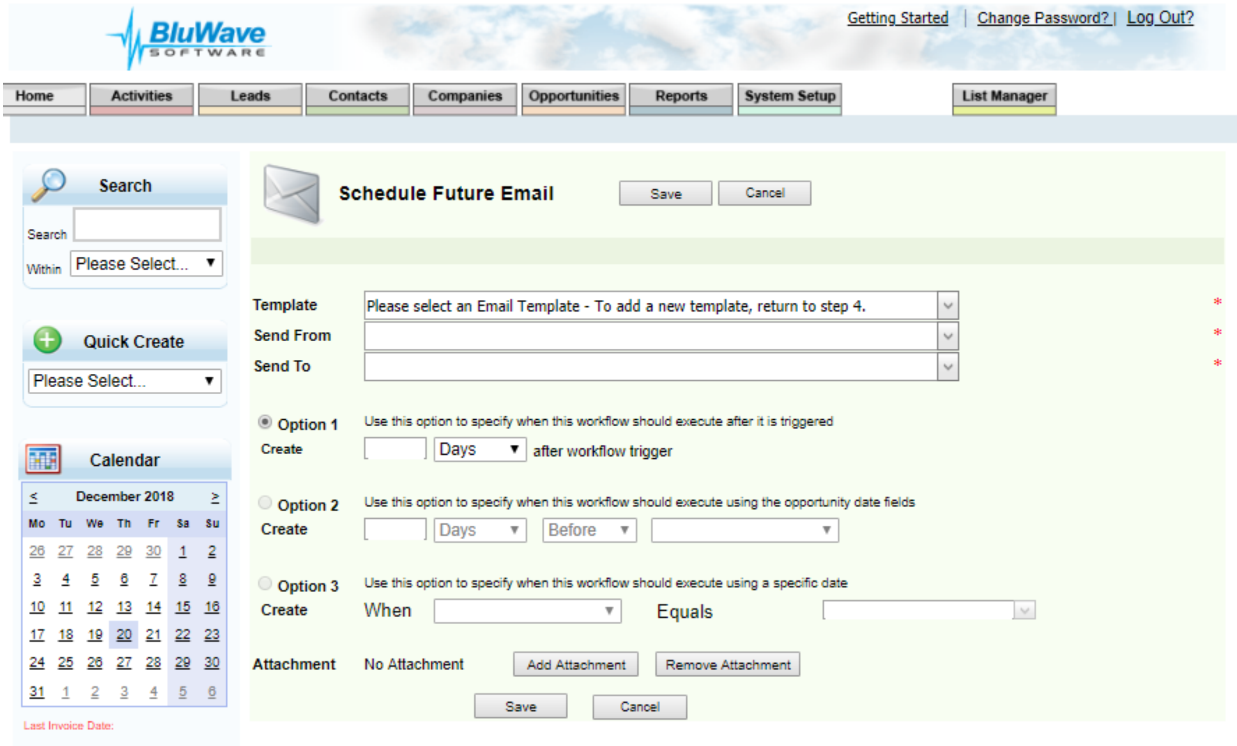
Click on **Save** to return to Step 4 of the Workflow Wizard.



6.5 A Scheduled Future Email

Future scheduled emails will be sent based on what option is chosen (same as with the future tasks).

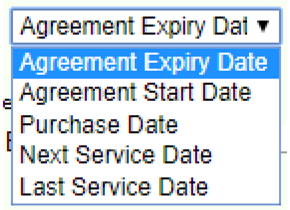
Remember to create the template first before setting up the email specifications (same as showed previously)



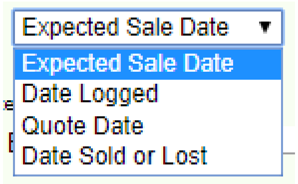
6.5.1 Options to schedule an email:

6.5.1.1 Option 1: Email will be scheduled for a certain amount of days or months after the workflow is triggered. (Applicable to all entities)

6.5.1.2 Option 2: Emails will be sent a certain amount of days before/after a specific fields' date value. (This is only applicable on the Opportunities and Current Products entity type)



Fields for Current Products



Fields for Opportunities

6.5.1.3 Option 3: Email will get sent when a specific date field equals a specific date entered. (This is only applicable on the Opportunities and Current Products entity type)

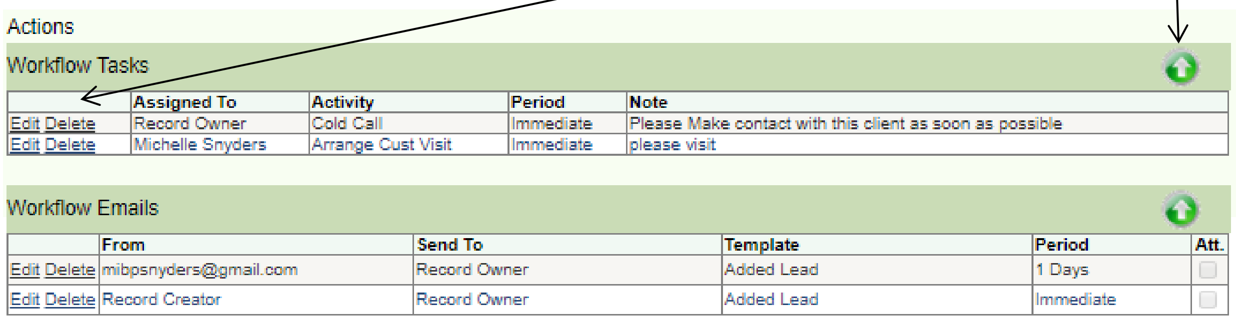
- **Template, Send From**, and **Send To** would be the same as with the **Immediate Email** (see the previous page)

When clicking on **Save**, the system returns to Step 4 of the workflow wizard.

6.6 View the actions associated with the workflow

6.6.1 Activities

To view what activities have been added, click in the **Workflow Tasks** panel, it will expand with list of task outcomes. Each of these can then be edited or deleted using the links.



Actions

Workflow Tasks

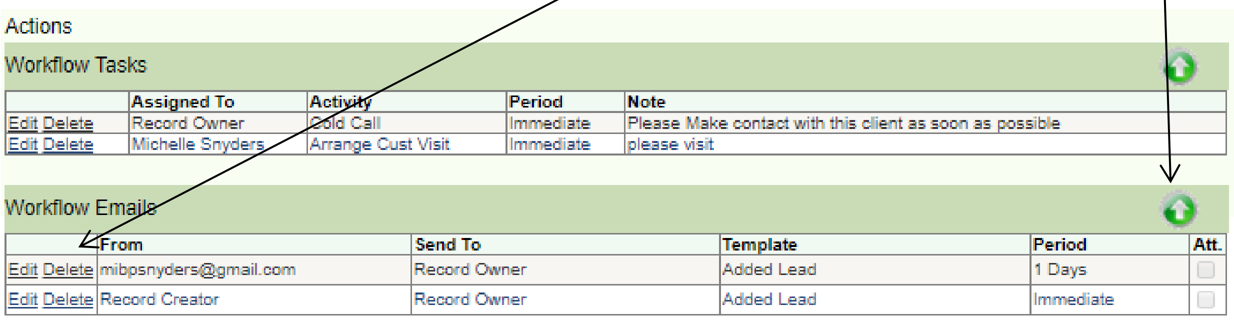
	Assigned To	Activity	Period	Note
Edit Delete	Record Owner	Cold Call	Immediate	Please Make contact with this client as soon as possible
Edit Delete	Michelle Snyders	Arrange Cust Visit	Immediate	please visit

Workflow Emails

	From	Send To	Template	Period	Att.
Edit Delete	mibpsnyders@gmail.com	Record Owner	Added Lead	1 Days	
Edit Delete	Record Creator	Record Owner	Added Lead	Immediate	

6.6.2 Emails

To view what emails have been added, click in the **Workflow Emails** panel, it will expand with list of task outcomes. Each of these can then be edited or deleted using the links.



If there are no more adjustments to be made to the workflow criteria or action, click on the **Finish** arrow.

The workflow created/edited would be seen on the **Workflow View** screen.

7. Workflow Keywords

The following keywords can be used when setting up the email templates. Each entity type or data set has its own keywords.

7.1 Leads Workflow Keywords

Company Name:	{Company}
Surname:	{Surname}
First Name:	{FirstName}
Contact Name & Surname:	{Contact}
Telephone No:	{Tel}
Cell No:	{Cell}
Email address:	{Email}
Notes:	{Notes}

7.2 Companies Workflow Keywords

Company Name:	{Company}
Contact Name:	{Contact}
Telephone No:	{Tel}
Cell No:	{Cell}
Email Address:	{Email}

7.3 Opportunities Workflow Keywords

Opportunity Name:	{OppName}
Expected Sales Date:	{ExpOrderDate}
Probability %:	{Prob}
Potential Sales Value:	{PotValue}
Quote Expiry Date:	{QuoteExpiry}
Quote Date:	{QuoteDate}
Quote No:	{QuoteNo}
Company Name:	{Company}
Date Logged:	{DateLogged}
Contact:	{Contact}
Notes:	{Notes}
Cell No:	{Cell}
Telephone No:	{Tel}
Email Address:	{Email}

7.4 Current Products Workflow Keywords

Purchase Date:	{PurchaseDate}
Agreement Expiry Date:	{AgreementExpiryDate}
Notes:	{Notes}
Purchase Price:	{PurchasePrice}
Product Description:	{Product}
Asset No:	{AssetNo}
Contact:	{Contact}
Cell No:	{Cell}
Telephone No:	{Tel}
Email Address:	{Email}

8. Revision History

Version	Date	Updates
SM0016	29/08/2019	• Creation
SM0016.3	06/05/2024	• Updated the screenshots for the new release