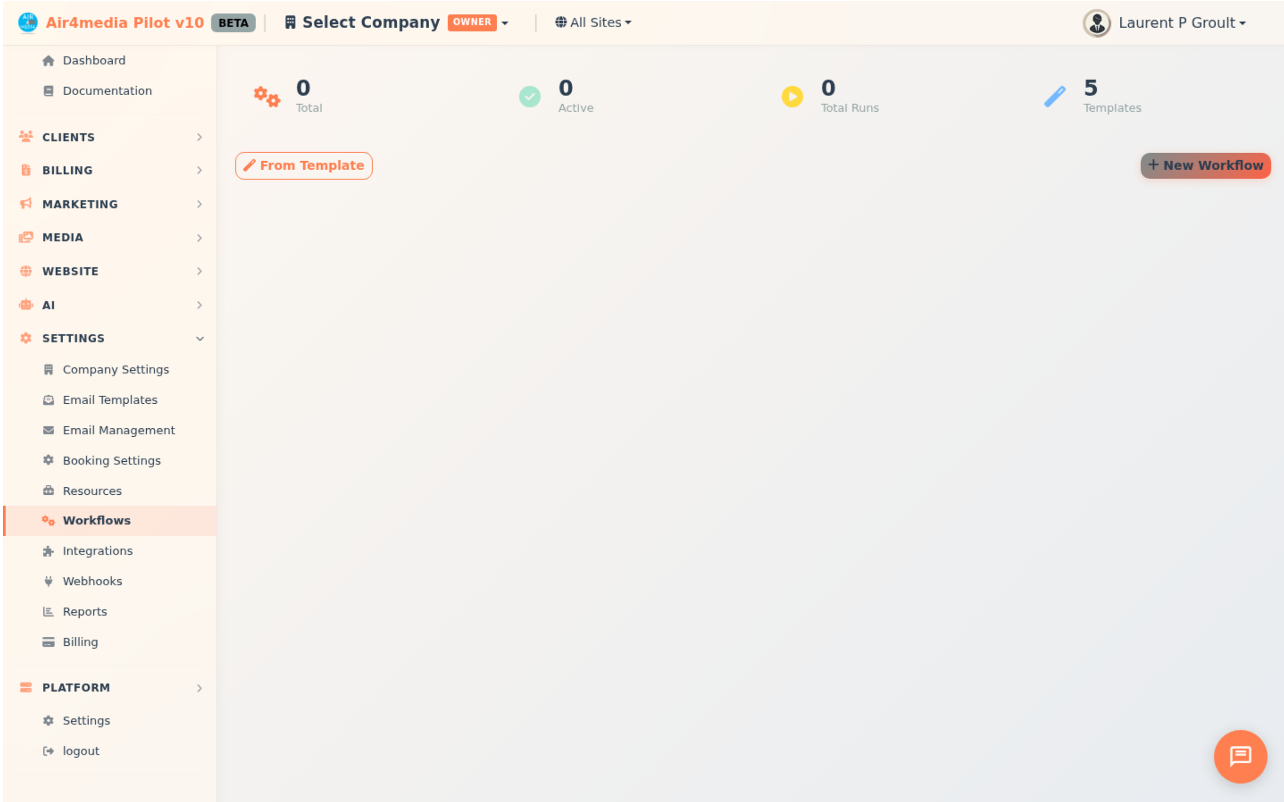

Workflows

Workflows let you automate repetitive tasks in your CRM. Set up rules that trigger automatically when something happens — like a form submission or a signed contract — and define a sequence of actions to run in response.

Key Features

- **Triggers**: Start a workflow based on real business events (form submitted, quote accepted, invoice paid, appointment booked, and more)
- **Multi-step Actions**: Chain multiple actions together — send an email, create a task, update a status, add a tag — all in one workflow
- **Templates**: Start from one of 5 pre-built workflow templates covering common business scenarios
- **Toggle On/Off**: Activate or deactivate any workflow without deleting it
- **Run Manually**: Trigger any workflow on demand using the Run Now button
- **Live Stats**: See how many times each workflow has run and when it last executed

How to Use

Create a Workflow

1. Click **New Workflow** to open the editor
2. Enter a name and optional description
3. Choose a **Trigger** — the event that starts the workflow:
    - Form Submitted, Lead Created, Quote Accepted, Contract Signed
    - Invoice Paid, Appointment Booked, Tag Added, Status Changed
    - Event Date Approaching, Scheduled, or Manual
4. Add one or more **Actions** (executed in order):
    - **Send Email** — send an email to the contact
    - **Send SMS** — send a text message
    - **Create Task** — add a follow-up task with a due date
    - **Change Status** — update the status of a project, quote, or contract
    - **Add Tag** — label the contact automatically
    - **Log Activity** — record a note or event in the CRM
    - **Send Quote** — dispatch a quote document
    - **Assign Resource** — allocate a resource to a project
    - **Wait** — insert a delay between actions
    - **AI Follow-up** — generate an AI-assisted follow-up message
    - **Webhook** — notify an external system
5. Click **Save Workflow**

Use a Template

1. Click **From Template**
2. Browse the available templates:
    - New Lead Follow-up
    - Quote Accepted → Contract
    - Contract Signed → Onboarding
    - Invoice Paid → Thank You
    - Appointment Booked → Confirmation
3. Click **Use Template** to pre-fill the editor, then customize and save

Manage Workflows

- **Edit** — modify any workflow at any time
- **Toggle** — switch a workflow active or inactive without deleting it
- **Run Now** — execute a workflow immediately for testing or one-off use
- **Delete** — remove workflows individually or select multiple and delete in bulk

Tips

- Use **variables** in email subjects and task titles to personalize content automatically — for example, `{{contact.name}}` inserts the contact's full name
- Keep workflows focused: one trigger, a clear sequence of actions
- Use the **Inactive** status to pause a workflow during busy periods without losing your setup
- Check the **Runs** and **Last Run** columns to confirm workflows are firing as expected