



Workflow **AUTOMATION**



■ ■ Workflow Automation

Marketers need to categorize their audience to maximize their reach. Zoho Campaigns automates recipient classification and action performance to free up marketers and unleash their creativity.

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Understanding workflow

Workflow automation lets you perform actions on contacts that have been categorized based on criteria that you've set.

For example, if you want to send an email to contacts in the United Kingdom, set the condition, "Country contains United Kingdom" and the action, "Send email". The workflow will scan the entire mailing list for contacts belonging to the United Kingdom, then trigger the action for contacts who meet the condition.

When can I use workflows?

Here are a few scenarios where you can make use of workflows:

- 1) When you want to push contacts that match certain criteria to your Zoho CRM account periodically.
- 2) When you want to maintain a list that contains only those contacts who match specific criteria. This is called a Smart List.
- 3) When you want to perform actions based on contacts' response to a campaign.
- 4) When you want to perform specific actions on contacts who sign up via a particular signup form.
- 5) When you want to automate the process of tagging your contacts who match a criteria.
- 6) When you want to assign lead scores based on field values.

Choosing the right type of workflow

Before you choose a workflow you need to decide on two major factors: The classification condition-either contact information or contact activity. When the workflow should trigger-immediately after conditions are met or at the time you schedule.

There are three types of workflows to choose from:

1) Instant Workflow

This workflow, once activated, will trigger each time the conditions are satisfied.

User scenario:

Jane has an online store for antiques. Contacts join her mailing list through the signup form embedded in her website. To promote her collection of antique jewelry to her female contacts, she defines a workflow with the condition "Title" is "Ms, Mrs" and the action "Send email" and then configures her promotional content. When the workflow is activated, the promotional email will be sent to every new contact who selects one of those titles on her signup form.

2) Time-based workflow

This workflow triggers at the time you specify, either once or recurringly.

One-time workflow user scenario:

Jane sends promotional campaigns to all contacts in her mailing list. She wants to give special offers to her active contacts. To decide who the active contacts are, she scores them based on their opens and clicks in a one-month timeframe. She hence creates a one-time workflow, sets the condition as 'Contact Score' is greater than 150', and selects 'Send Email' as the action. After composing the email content, she schedules the workflow to trigger after one month and activates it. Though active, the workflow will be triggered only at that specified time. This action will be performed only once.

Recurrent workflow user scenario:

Jane wants to push the contacts that join her mailing list to a Zoho CRM module at the end of every week. She hence sets the condition as 'Added time is current week' and selects the action as 'Push contacts to Zoho CRM'. She then sets the time interval as 'Every week on Saturday' and activates the workflow. Thus the contacts added to her mailing list every week will be pushed to Zoho CRM on Saturdays, till the workflow is kept active.

3) Activity-based workflow

This workflow's trigger is based solely on contact activity. These are pre-definable workflows that can be invoked from any entity, such as signup forms, campaigns. Active workflows can only be associated with entities. You can associate a single workflow with any number of entities.

User Scenario 1:

Jane has embedded signup forms in her website, blog, and Facebook page. She now wants to categorize her contacts by country so that she can send separate series of campaigns to them. Contacts enter her mailing list through these signup forms. She creates three activity based workflows, one to segment US based contacts, one to segment Japan based contacts and the other for Australian contacts. She defines 'Add to another list' as the action for each workflow. She associates the three signup forms with these three workflows. Hence, she now has three different mailing lists each holding contacts belonging to the three different countries to whom she can send targeted campaigns.

User Scenario 2:

Now that Jane has categorized her contacts by country, she decides to send them three different email campaigns each having content specific to country. She wants to categorize contacts that open the campaign and send them an automated series of campaigns using an autoresponder.

She creates an activity-based workflow and defines 'Add to another list' as the action. She then associates each of the three campaigns with this workflow and sets the criteria as 'Campaign opens'. Thus every time there is a campaign open, the contact will be added to a new list. Now she creates a signup based autoresponder for this list to send them an automated series of promotional campaigns.

How to create a Workflow

1. From the Automation tab choose Workflow.
2. Click on Create Workflow button present at the top-right corner.
3. Hover over the type of workflow you want to create and click Create New.
4. Provide the following information:
 - **Name** for the workflow for your reference in the future.
 - **Select a mailing list** to associate with the workflow. If necessary, you can create a new mailing list. In an activity-based workflow, you need not select the mailing list as this workflow is not mailing list specific.
 - Set up criteria defining the conditions with which your contacts should be categorized. You can set up to six criteria and set the criteria pattern as of your choice.



Note: In activity-based workflow, it is not mandatory that you define this criteria as contact activity is the primary trigger for the workflow.

- Select an action to be performed. You can select any number of actions.
- For Time-based workflow specify a time to trigger the workflow. Choose between one-time trigger and periodic trigger by selecting the appropriate radio button then schedule the workflow.

5. Activate the workflow immediately or Save as Draft for use in the future.

Define conditions and actions for the workflow.

Name

if

A contact is present in the mailing list

and

Meets the following condition

1

Criteria Pattern: 1

at

Specific time as follows

Once

Periodic

at

Specific time as follows

Once

Periodic

Based on

Every month on [More options](#)

Listed below are the actions that can be performed using workflow:

1) **Remove contacts from list:** Contacts who meet the criteria will be removed from the mailing list.



Note: As activity-based workflows are not list based and hence do not have a source list, this action cannot be availed for that kind.

2) **Add contacts to another list:** Contacts who meet the criteria will be added to another mailing list that you specify. If necessary, you can create a new mailing list.

You can make the target list a smart list. The workflow will add the contacts that meet the specified criteria to the smart list. After the workflow is activated, any contact already present in the smart list that does not meet the criteria will be removed automatically from the list. Also if any contact, that was added to the smart list through the workflow (i.e., those who met the specified criteria), stops meeting the criteria they will be removed from the list. Thus the smart list, at any point of time, will hold only those contacts who match the criteria specified in the workflow associated to the list.

3) **Send email** to contacts who meet the criteria. Create a new campaign and configure content. You can choose to send it immediately, or schedule it for later.

4) **Push to Zoho CRM** the contacts that meet the criteria. You can either push all contacts to Zoho CRM or update just the existing contacts' Campaigns related information in Zoho CRM. To push contacts, you will have to configure mapping with your Zoho CRM account.

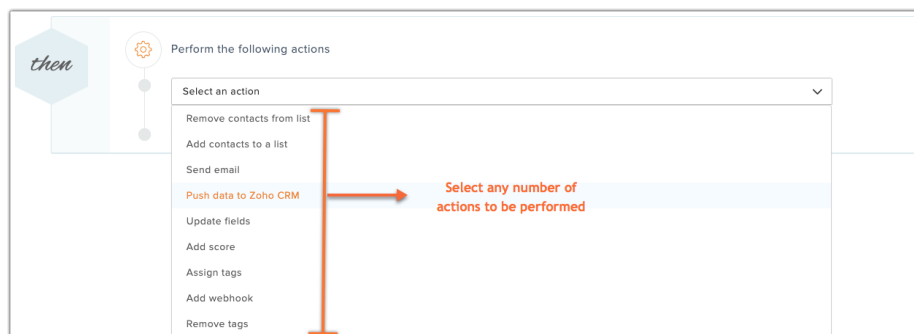
5) **Update fields** of the contacts who meet the criteria. Select the field to be updated and provide a value for the field. You can choose to update any number of fields. In update field you can do one of the following:

Text fields: Overwrite the existing text value or append text to the existing value.

Integer fields: Overwrite the existing integer value or add or subtract an integer from existing value

Date and time fields: Overwrite the existing date and time with any value or update to the date and time when the action occurs.

6) Add contact score to contacts that meet the criteria. Select a score to be added.



How do I associate an activity-based workflow with an email campaign

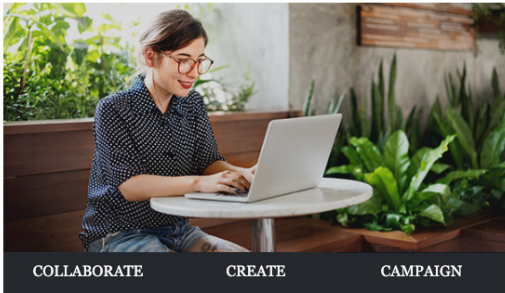
Select the intended campaign. From the campaign summary, select from among the active workflows listed for each email action under Workflow Setup.

You can also associate an activity-based workflow when creating your campaign. In the Review step of the campaign creation process, select the workflow for opens and clicks under Workflow Setup.

Campaign Preview HTML Text

Can't read or see images? [View this email in a browser](#)

Your content goes here...



COLLABORATE
CREATE
CAMPAIGN

Summary Report

22	22	0	0
Delivered	Unopened	Opened	Clicked

Campaign Details

- Subject: rest!
- Sender Name: Sender!
- Sender Address: kalaivani.v+t45006@zohotest.com
- Reply Tracking: Disabled
- Reply-to Address: kalaivani.v+t45006@zohotest.com
- Recipient Personalized: No
- Tracking Options: Google Analytics - Not Configured
- Other Options: UTF-8
- Recipient Details: sub list kalai test
Sent to **22** contacts
- Contact Scoring: Set scoring
- Workflow setup: View details Configure

Workflow setup

Which workflow to trigger on opens? Select a workflow ▼

Which workflow to trigger on clicks? Select a workflow ▼

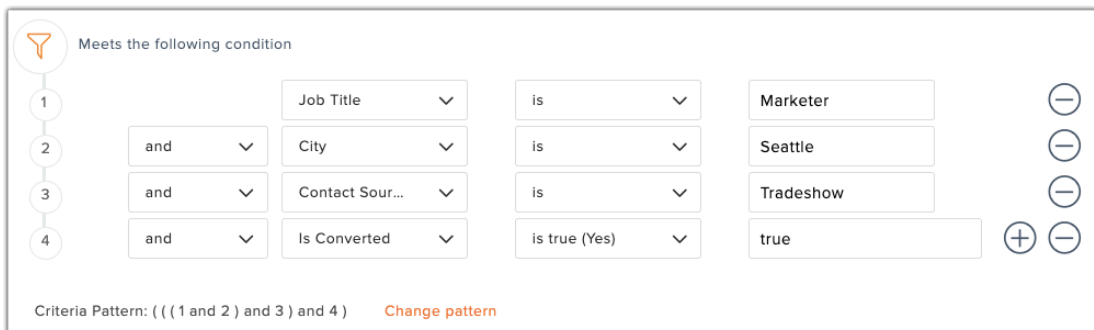
Save
Cancel

How do I change the criteria pattern?

The default criteria pattern is “(((((1 and 2) and 3) and 4) and 5) and 6)” if you choose all six criteria. However, you can choose between the operators ‘And’ or ‘Or’ between the conditions. If you wish to change the position of the parentheses, click the link [Change pattern](#) to edit the pattern.

Use Case

You want to filter contacts by creating a view that displays all contacts from automobile industry who recently attended a tradeshow and whose location is either San Diego or San Francisco. When you specify this criteria using the Criteria Editor, the criteria pattern will be displayed as shown below:

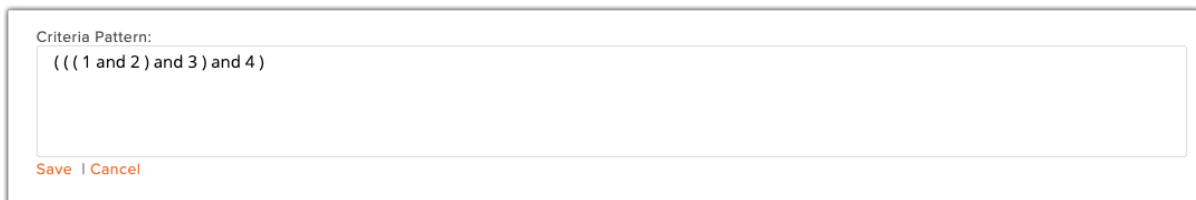


Meets the following condition

1		Job Title	is	Marketer	⊖
2	and	City	is	Seattle	⊖
3	and	Contact Sour...	is	Tradeshow	⊖
4	and	Is Converted	is true (Yes)	true	⊕ ⊖

Criteria Pattern: (((1 and 2) and 3) and 4) [Change pattern](#)

The default pattern is (((1 and 2) and 3) or 4). However, the required pattern is ((1 and 2) and (3 or 4)). This modification can be made using the Change Pattern option.



Criteria Pattern:

(((1 and 2) and 3) and 4)

[Save](#) | [Cancel](#)

Managing workflows

How do I delete, clone, edit, or freeze a workflow

You can delete, edit or clone any workflow you own or have the permission to access.

To clone:

1. Select Automation tab and click Workflow sub tab. A page displaying all your workflows will appear.
2. Hover over the workflow you wish to clone. The Clone icon will appear in the far-right corner. On clicking this icon a clone of the workflow will be created which can later be edited the way you want to.

You can also clone a workflow by navigating to its Details page and selecting the Manage Workflow button in the top-right corner and choosing Clone from the drop down options.

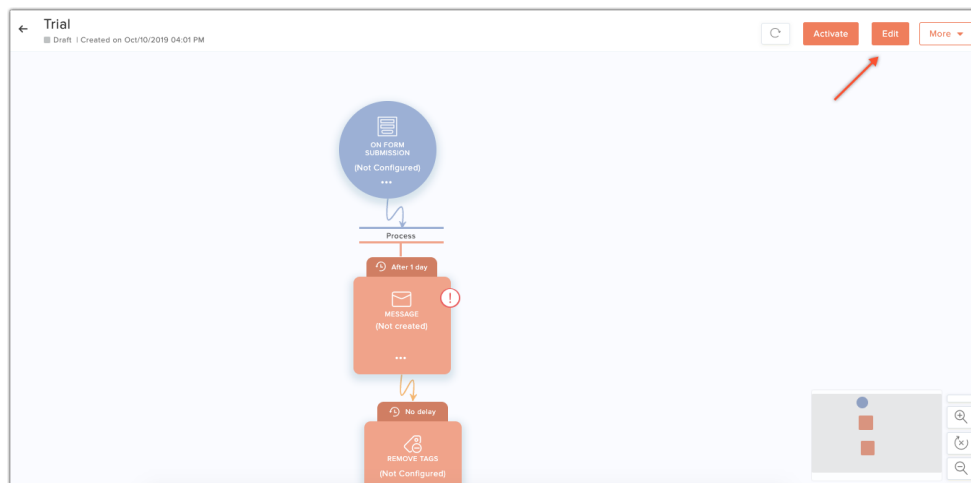


To edit:

1. Select Automation tab and click Workflow sub tab. A page displaying all your workflows will appear.
2. Click the workflow you wish to edit.
3. Click Manage Workflow in the top-right corner and select Edit.



Note: You can edit a workflow only when in draft; a workflow once activated cannot be edited.



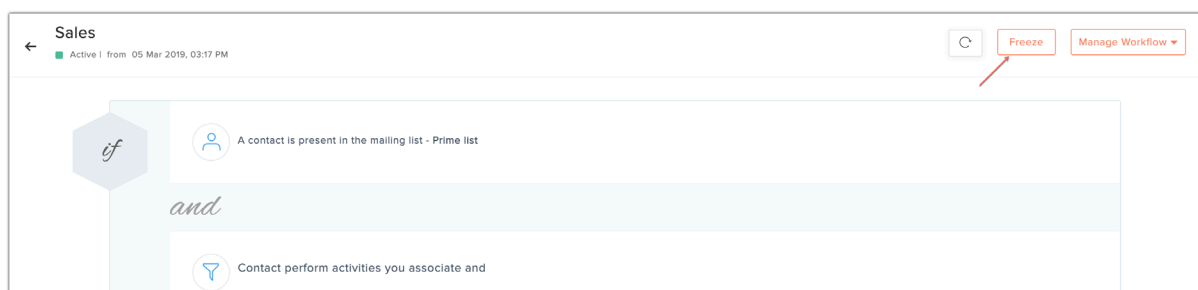
Stop a workflow from processing on new contacts

Freeze the running workflow to stop it from processing on new contacts. Actions will be performed on the contacts who had entered the workflow before you freeze the workflow.

To do this:

1. Click the Automation tab and select Workflow. A page displaying all your workflows will appear.
2. Click the workflow you wish to freeze.
3. Click Freeze in the top-right corner.

Click Resume button on the top-right corner of the page if you want to resume the workflow.



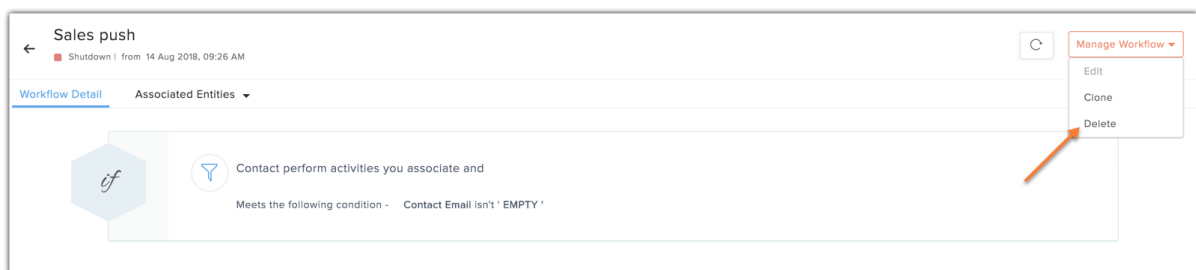
Shut down a workflow

Shut Down a workflow if you need to stop a workflow from processing any contacts (even those contacts who have already entered the workflow).

To do this:

1. Select Automation tab and click Workflow. A page displaying all your workflows will appear.
2. Click the workflow you wish to shut down.
3. Click Manage Workflow in the top-right corner and select Freeze if the workflow is not freezed.
4. After the workflow is freezed, click Manage Workflow in the top-right corner and select Shut Down.

For a safe shut down, you can freeze the workflow and wait for it to perform actions on the contacts who have already entered the workflow, and then shut it down.

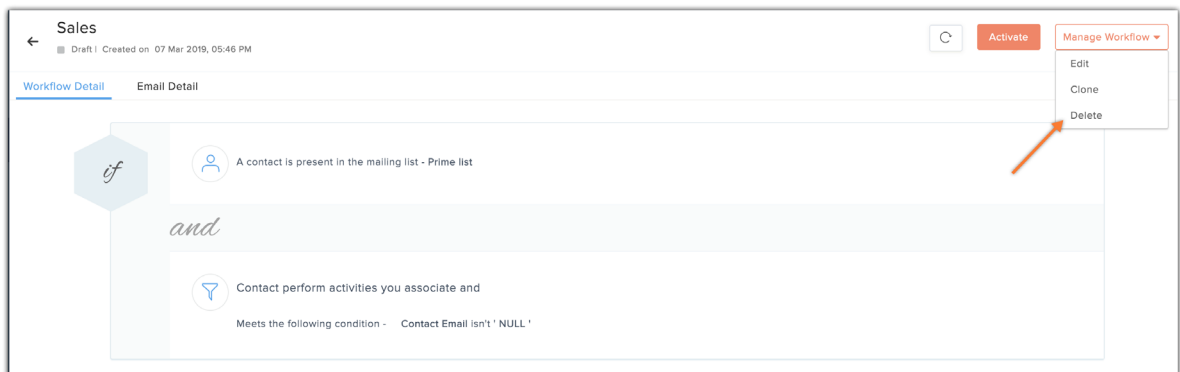


To delete

A running workflow cannot be deleted. You need to shut the workflow down before you delete it.

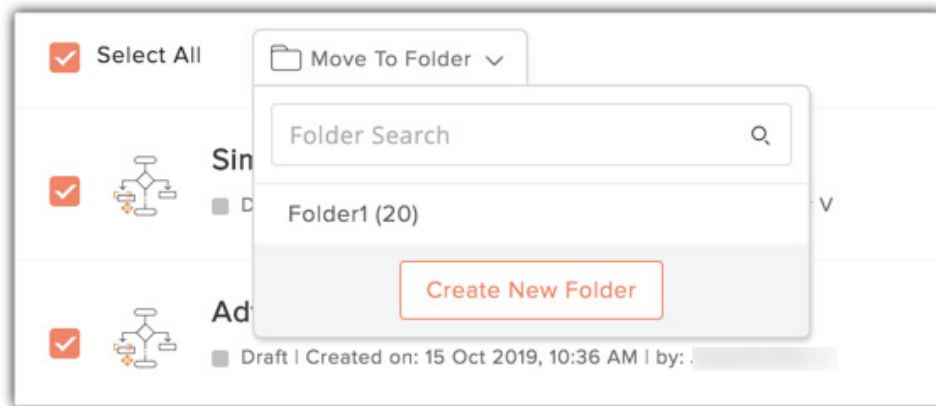
To do this:

1. Select Automation tab and click Workflow. A page displaying all your workflows will appear.
2. Click the workflow you wish to delete.
3. Click Manage Workflow in the top-right corner and select Freeze if the workflow is not frozen.
4. After the workflow is frozen, click Manage Workflow in the top-right corner and select Shut Down if the workflow is not shut down.
5. After the workflow is shut down, click Manage Workflow in the top-right corner and select Delete.



How do I group my workflows?

For easy handling of your workflows, you can group them and put them into folders. You can create the folders from the My Workflow page. Create new workflows within a folder or move workflows to one. You can also delete or edit a folder.



Workflow reports

You can view reports for any active workflow. The report will display a list of contacts on whom actions were performed and a list of those that were missed out, along with the reason they were skipped

To view the reports of the various actions:

For instant and time-based workflows:

- 1) Select Automation tab and click Workflow sub tab. A page displaying all your workflows will appear.
- 2) Click the workflow for which you want to view the reports.
- 3) Click on View Reports button next to the action for which you want to view the reports.

For activity-based workflows:

- 1) Select Automation tab and click Workflow sub tab. A page displaying all your workflows will appear.
- 2) Click the workflow for which you want to view the reports.

3) Click on Entities Associated subtab. From the list of entities that appears, select the one for which you want to view the reports.

Workflow status

- 1) Active: When you activate the workflow and the workflow is running.
- 2) Completed: When the process of the workflow has been completed. Only one-time workflows fall under this category.
- 3) Draft: When you save your workflow as draft for use in the future.
- 4) Frozen: When you manually freeze an active workflow.
- 5) Shutdown: When you manually shut down a workflow.

6) Stopped:

Actions defined in your workflow might stop due to the following reasons:

- The list that you've associated with the workflow may have been deleted. This does not apply to activity-based workflows.
- If the action is 'Add to another list', the target list (i.e. the list you've selected to add the contacts to) may have been deleted.
- If the action is 'Push to Zoho CRM', the custom field mapped to Zoho CRM may have been deleted.
- If the action is 'Update fields', the custom field to be updated may have been deleted.

If all actions defined in the workflow have stopped, the workflow will be stopped. If not, the workflow will remain active, performing the active actions. Once stopped, a workflow cannot be activated.



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