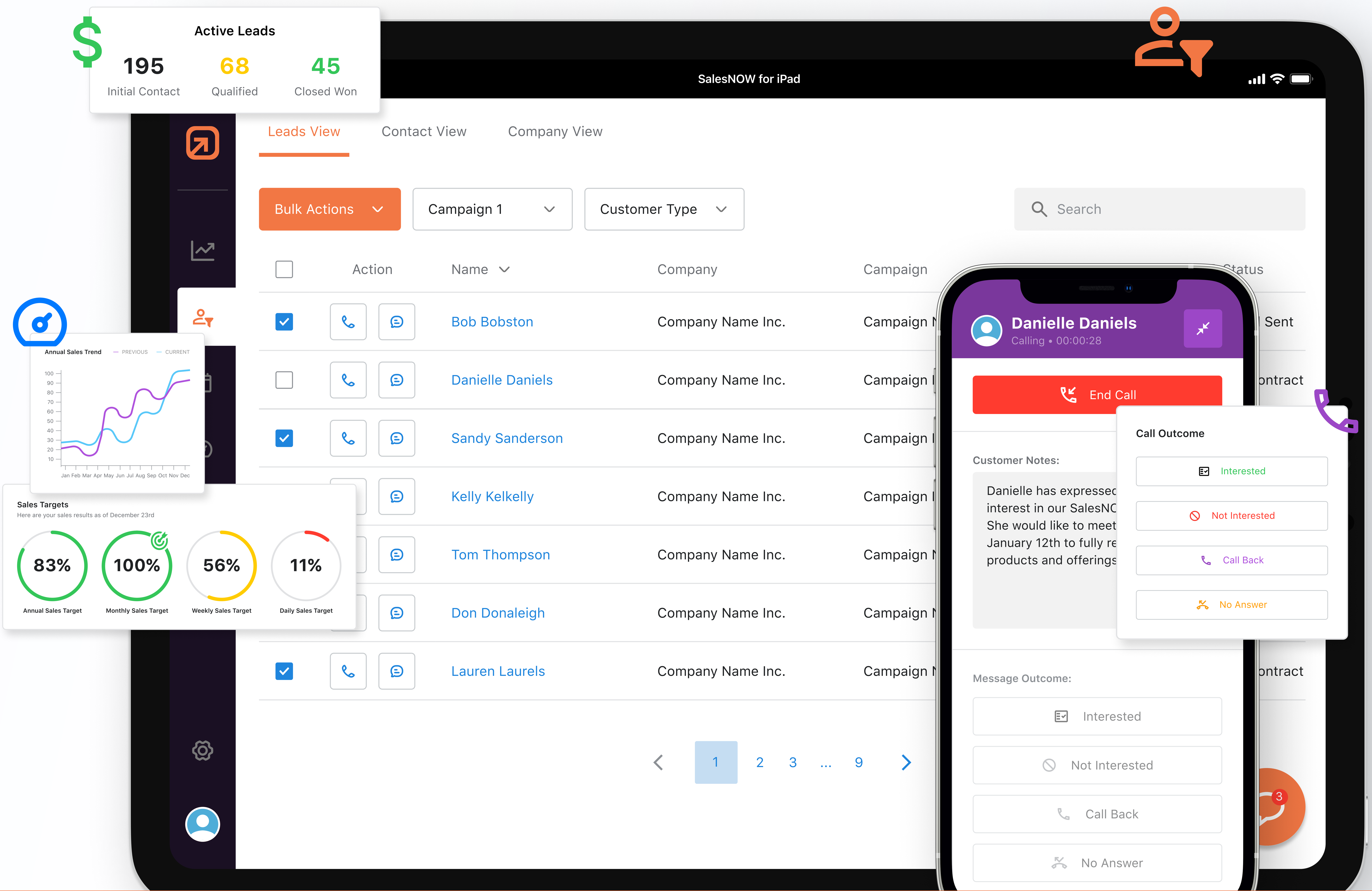
SalesNOW®

SalesNOW CRM Workflow Engine: Streamlining Deal and Project Management Through Automation



SalesNOW.com

Making Sales Happen with Professionally Managed CRM.

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Executive Summary:

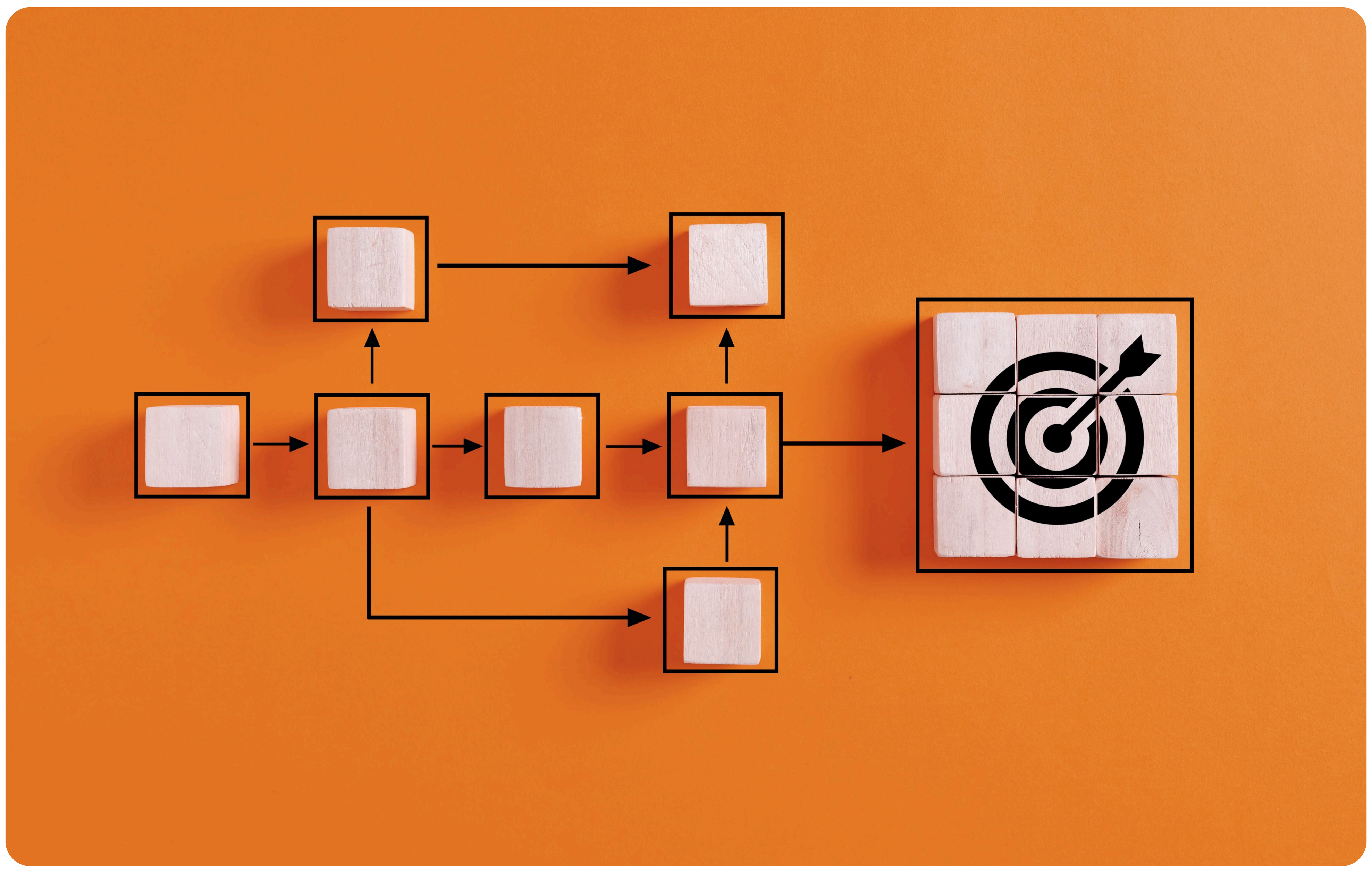
In today's fast-paced business environment, effective deal and project management demands flexible automation that evolves with business needs. The SalesNOW CRM Workflow Engine empowers organizations to automate and streamline processes across sales, service, and operations—reducing manual effort and accelerating deal velocity.

From real-time lead reassignment to multi-step approvals and data synchronization, SalesNOW's workflows enable companies to scale processes intelligently.

1. Overview

A Workflow is Triggered if either one or Multiple Conditions are met. Once the Condition(s) are met, the Workflow will automatically execute one or more Actions as defined by the user.

2. Workflow Conditions



Workflows are triggered when one or more conditions as detailed below are met:

1. **Record Properties:**
   - A condition can be met if the value of a record changes, such as a change in the Status, priority, value, type;
2. **Association:**
   - A condition can be met if the association of a record is changed;
3. **User/Owner:**
   - A condition can be met if the User/Owner of a record changes;
4. **Computed Values:**
   - A condition can be met if the real time computed value of a record changes;

3. Action Types

When all of the Conditions as defined by the Workflow are met, the system will execute one or multiple Actions as defined below:

1. **Assignment**
   - Automate the ownership and reassignment of records based on business logic:
     i. Assign leads to reps by territory, performance, or workload
     ii. Define secondary owners for collaborative selling or service cases
2. **Modification**
   - Update data across a wide scope:
     i. Modify fields on the current record
     ii. Update parent records or child records
   - Field values can be:
     i. Static (e.g., 'Closed Won')
     ii. Referenced (e.g., 'Assigned To → Manager')
     iii. Computed (e.g., 'Close Date = Today + 30 Days')
3. **Notification**
   - Automate communications using predefined message templates:
     i. Send Email, SMS, or Chat messages
     ii. Dynamically inject record data into templates for contextual messaging
     iii. Use notifications for escalations, follow-ups, or task completions
4. **Item Creation**
   - Automate the generation of related business objects:
     i. Create associated records (e.g., tasks, follow-ups)
     ii. Generate documents or reports
     iii. Initiate job queues for: mass data operations, partner system integration, asynchronous processing

4. Advanced Nested Workflow Execution

For advanced scenarios, Modification and Item Creation actions can trigger nested workflows: Conditional chains of actions

- Modular, reusable automation patterns
- Complex interdependent processes (e.g., onboarding flows, SLA escalations)

5. Workflow Visual Management Interface

The Workflow Summary View in the UI provides:

- A bird's-eye view of active rules
- A visual map of triggers, actions, and conditions
- Easy navigation for audit and optimization

6. Workflow Integration Touchpoints

Workflows can be triggered from any interaction layer, including:

- Web App: Direct user interactions
- Mobile App: Field and on-the-go automation
- Data Import: Apply logic during bulk data entry
- REST API: Extend automation to external systems
- Third-Party Integrations: Trigger flows from partner tools

Use Case Example:

One of our customers uses our Comprehensive Workflow system to automate their Deal and Project Management process. Here is an example of how they use Workflow extensively to automate their process:

1 **ZIP mapping of Leads**

When a Lead comes into their website, the system performs a ZIP mapping to determine which branch the Lead should be assigned to;

2 **Lead Assignment**

The lead is automatically assigned to the Branch. The system emails the sales rep and the Branch manager of the Lead Assignment. The Lead will automatically appear on the Sales Coordinator's Dashboard that the Lead is waiting to be accepted;

3 **Escalation**

If the Sales rep has not accepted the Lead in a timely manner, the Sales Rep and the Branch Manager receive an Escalation email;

4 **Accepting the Lead**

Once the sales rep accepts the Lead, the system will email the sales manager that the opportunity is being worked on and removes the Lead from the Awaiting Acceptance Dashboard;

5 **Creating Proposal**

The sales rep uses the system to cost out the configuration and to price out the Proposal. Based on the Margin of the Proposal, the system may require Manager or Regional Manager Approval;

6 **Request Approval**

The sales rep can then request approval of the Proposal. Based on the margin of their Proposal, the system will automatically request approval from the Sales Manager, the Area manager and the CFO.

7 **Reject Approval**

If the manager rejects the approval of the Proposal, the system will email the sales rep the reasons of the rejection. The sales rep can then make the required changes and resubmit for approval;

8 **Approved Proposal**

Once the Proposal is approved, the system allows the sales rep to email the proposal to the customer;

9 **Create Contract**

Upon customer approval, the sales rep can send the Contract to the customer with embedded electronic signature capability;

10 **Customer and Sales signing of the Contract**

Once the customer has signed the Contract, the system will email the sales rep for them to also sign the contract. Upon the sales rep signing the Contract, the system will automatically update the contract value and will mark the deal as won on the date of the signature. The Sales manager will also be notified of the win, as well as the sales coordinator;

11 **ERP Integration**

Once the contract is won, the system automatically creates the Work Orders in the ERP system;

12 **ERP Updates**

Updates from the ERP system such as installer notes and updates to the installation date will automatically update the Project in the CRM

Conclusion

The SalesNOW Workflow Engine is a cornerstone of operational efficiency. By combining flexible conditions, powerful actions, and seamless integrations, businesses can move from manual effort to intelligent automation—scaling processes without increasing complexity.

Discover how your team can reduce manual work and accelerate growth with SalesNOW's Workflow Engine. Contact us today for a personalized demo.

Let SalesNOW power your process intelligence and free your team to focus on growth.