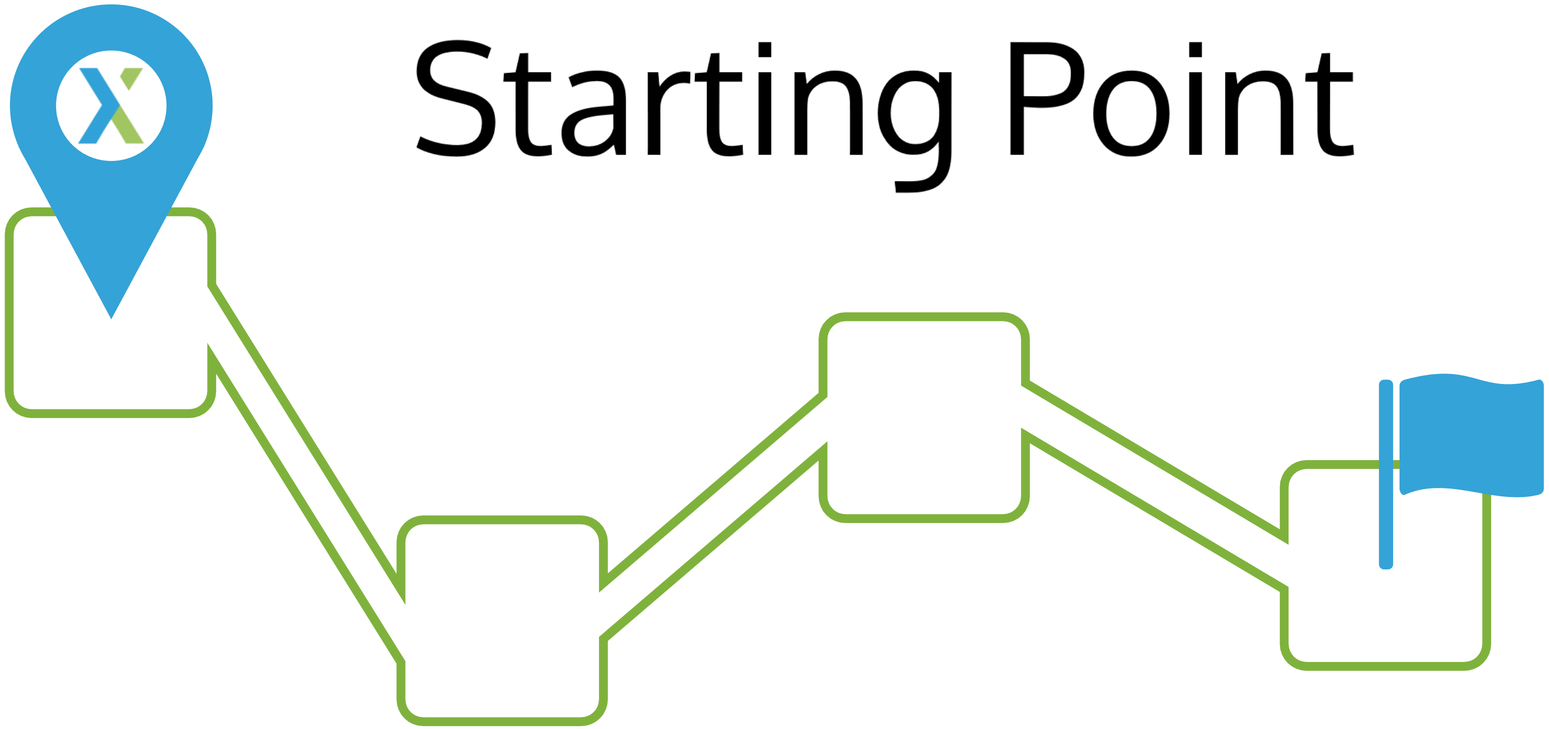
Session 6
Workflow Tools

Starting Point



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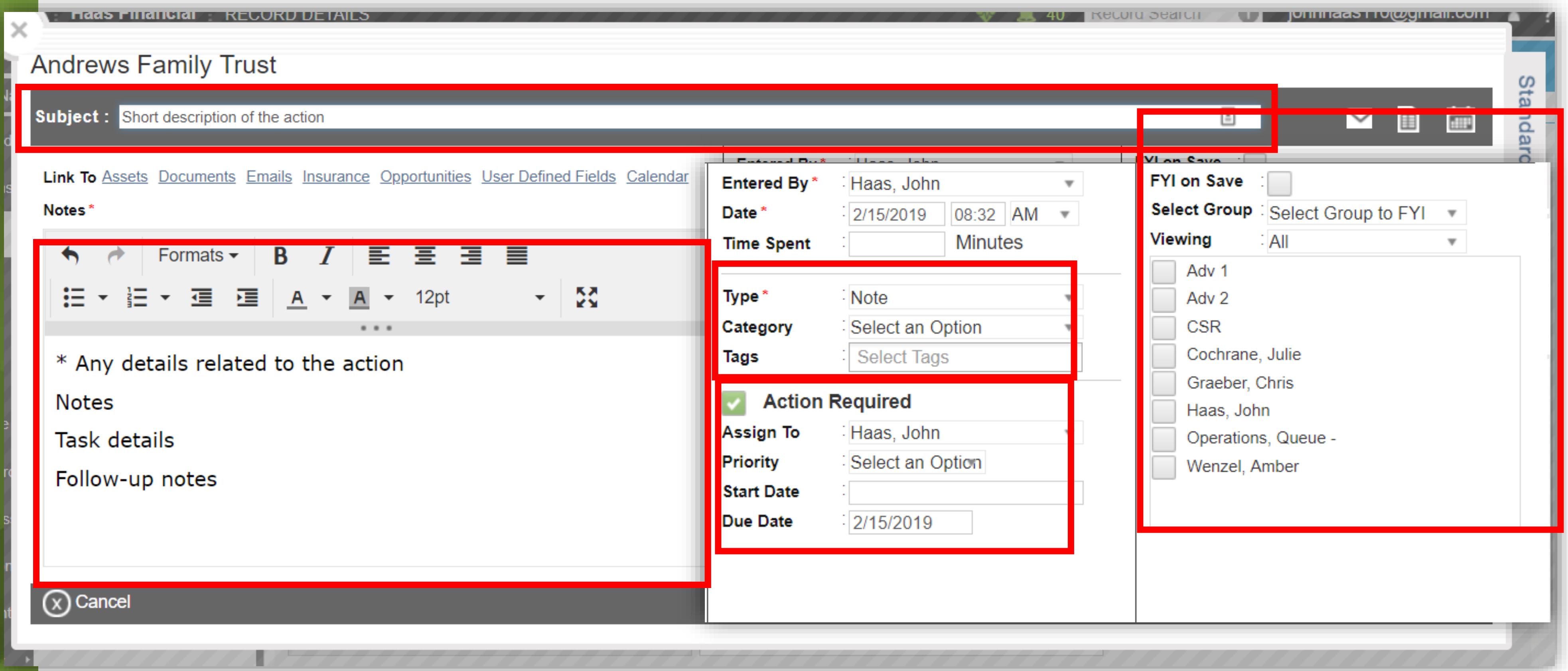
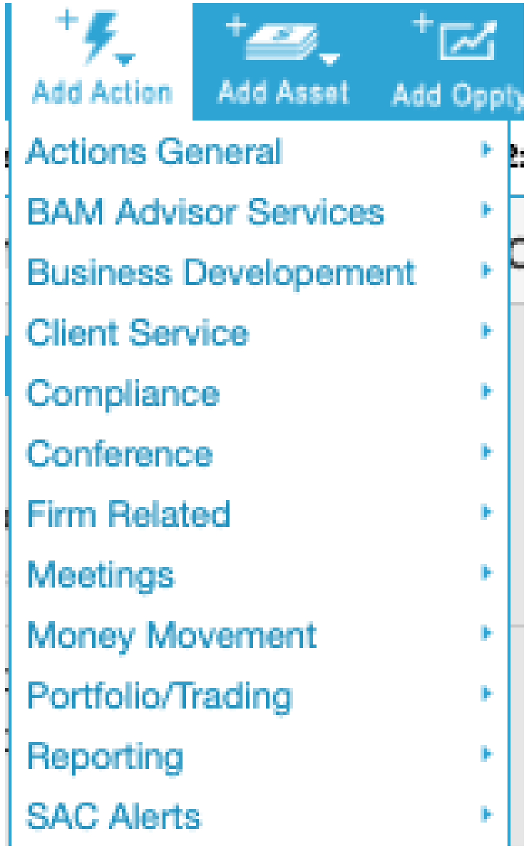
Benefits of Workflow

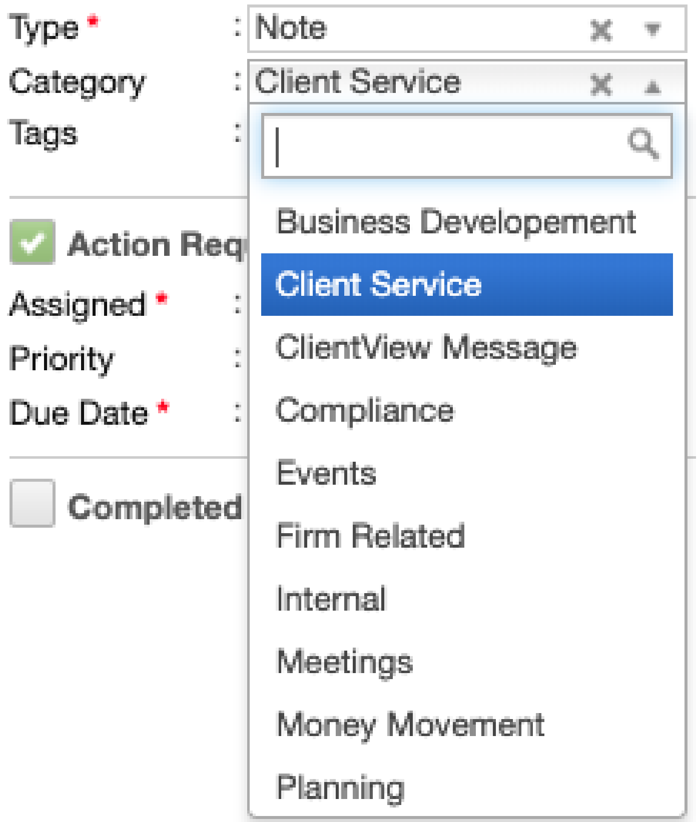
- Consistency!!!
- Documenting Processes
- Digital Manual
- Tracking Made Simple

Review: Action Fields



Workflow Category vs. Action Category





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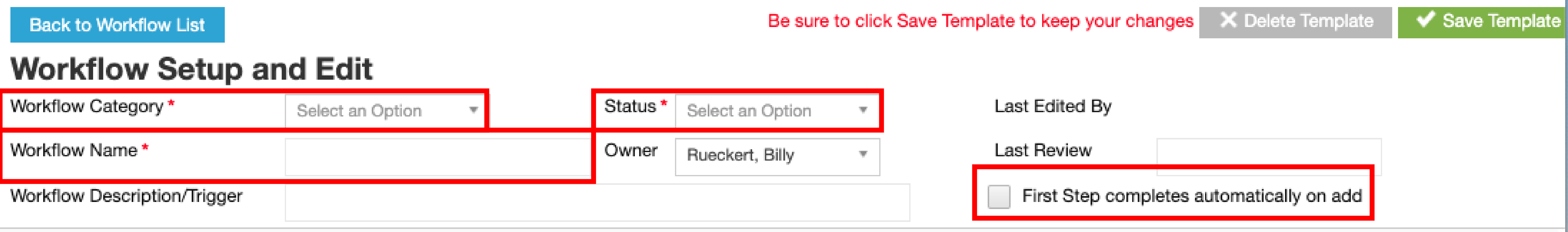
Workflow Setup - Important Fields



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Single Step

Back to Workflow List

Be sure to click Save Template to keep your changes | Delete Template | Save Template

Workflow Setup and Edit

Workflow Category *	Client Service	Status *	Active	Last Edited By	Rueckert, Billy
Workflow Name *	SDB - Gift to Client	Owner	Select an Option	Last Review	3/9/2020
Workflow Description/Trigger	Initiate anytime you send a gift to a client				First Step completes automatically on add

Summary

Gift to Client

Expand All | Collapse All

Assigned : <Employee Creating Action> **Type:** Note
Subject : Gift to Client

Notes:
Who gift to:

(Client or Spouse or both)

Reason for gift: (example: birthday, new job, death in family)

What gift: (example: flowers, candy, gift certificate)

Order or purchase gift Send gift to client Add any Action Tags that apply (example: marriage, birth)

When you complete this action, note:

Date sent:

Delivery method:

Amount of gift:

FYI anyone in the office that needs to know about the gift

Type : Note
Category : Client Service

Assigned : <Employee Creating Action>
Priority : Medium
Days Until Due :

Assignee:
<Employee Creating Action>

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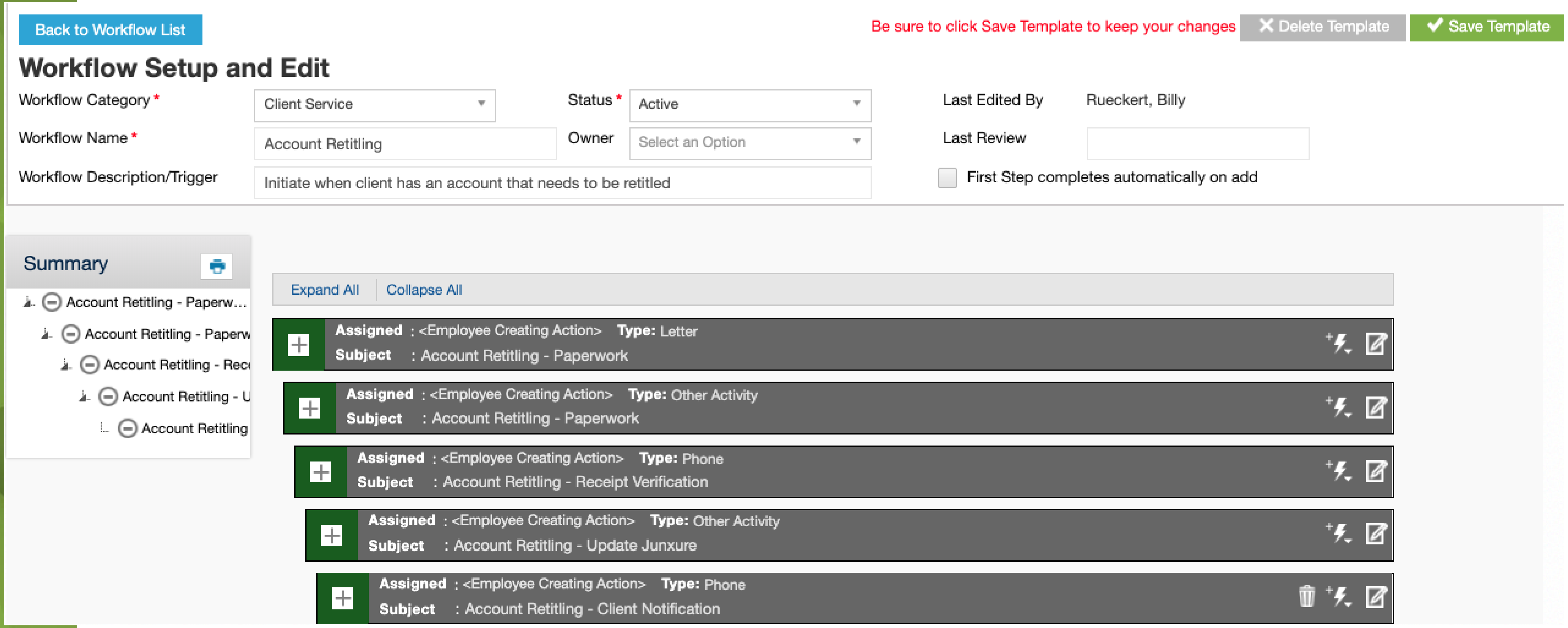
Multi-Step: Dependent



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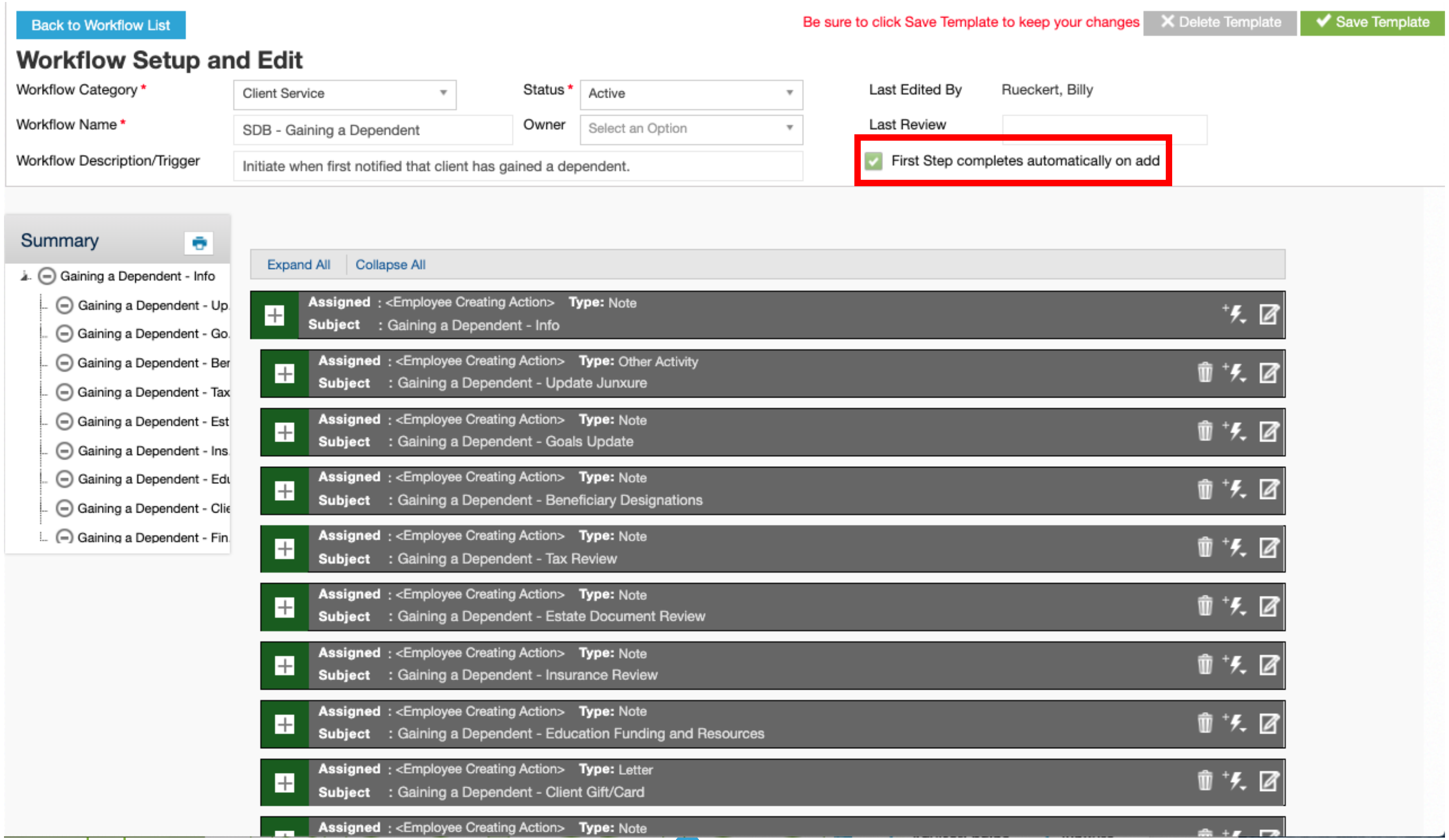
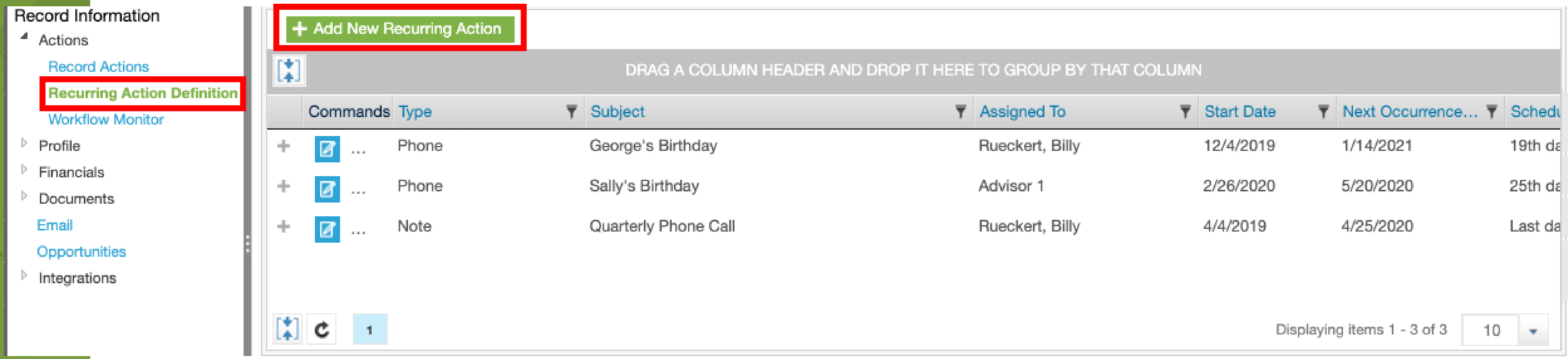
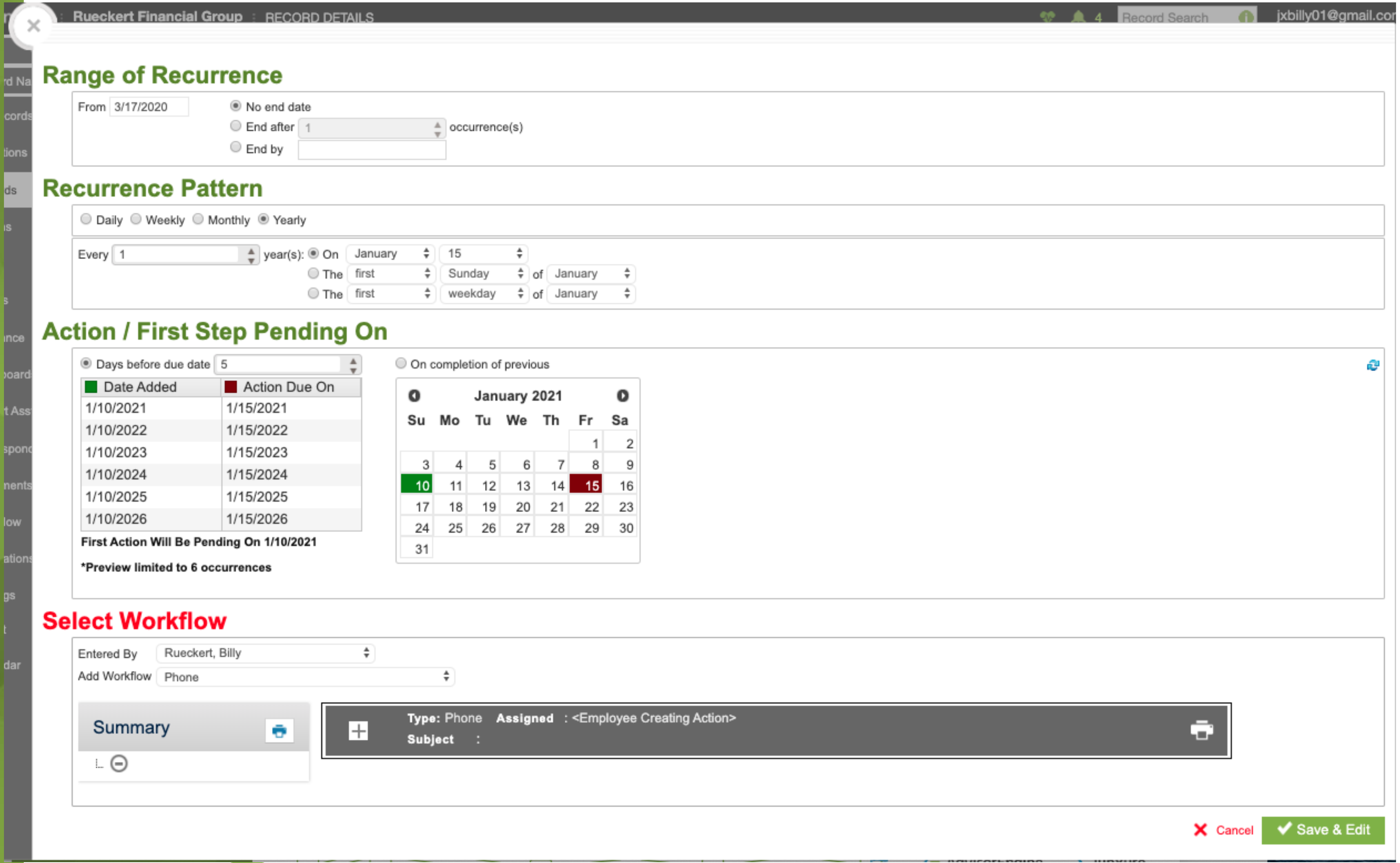
Multi-Step: Independent



Recurring Actions



Recurring Actions



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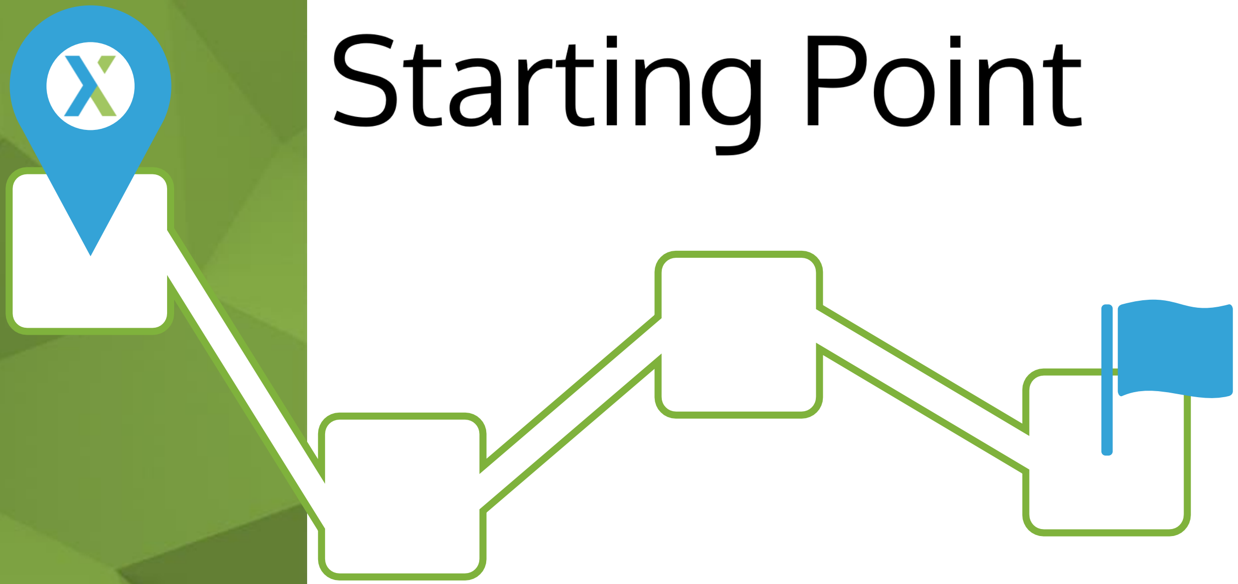
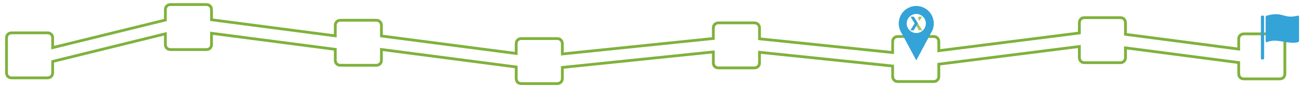


Starting Point

Ensure your success by finishing this series!

Next Session:

Documents and Correspondence Tools



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