DYL’s Full Workflow Guide

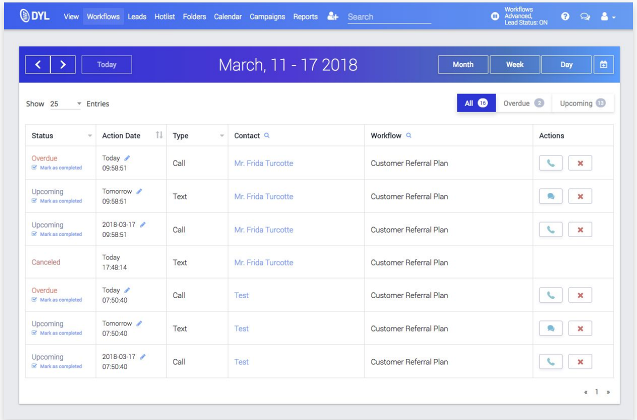
Features Guide V1 | March Release 2018

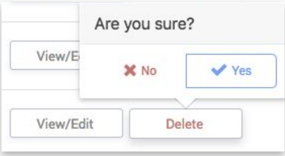
DYL

The Intelligent Business Phone System

OVERVIEW

Overview





What Are Workflows?

- Workflows will automate your follow-up calls, texts, emails, and tasks in a pre-set sequence.

- You can use Workflows for sales, customer service, or any other purpose.

- Workflows will replace our older email drip and callback sequences.

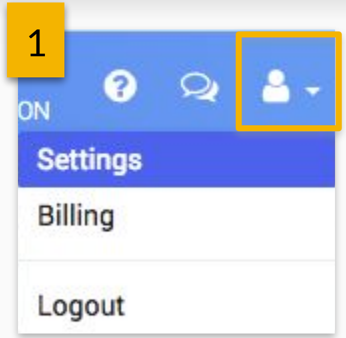
IMPORTANT If you have existing email drips and callback sequences, you **will need** to move them to Workflows. Email drips will be stored in a folder with the previous email drip name.

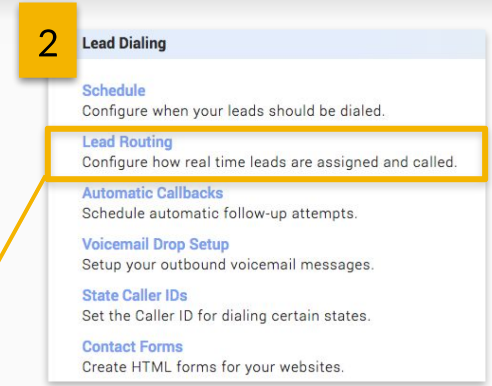
Visit our Help page for more information.

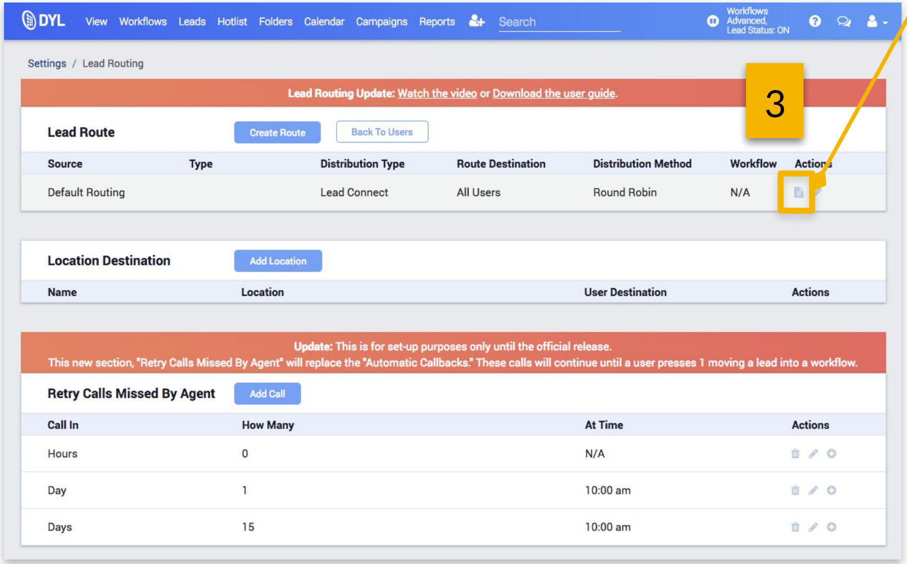
Lead Routing Settings

IMPORTANT: Set up one time email and text “Route Templates” for real time leads when they come in.

[Watch this video for more info](#).

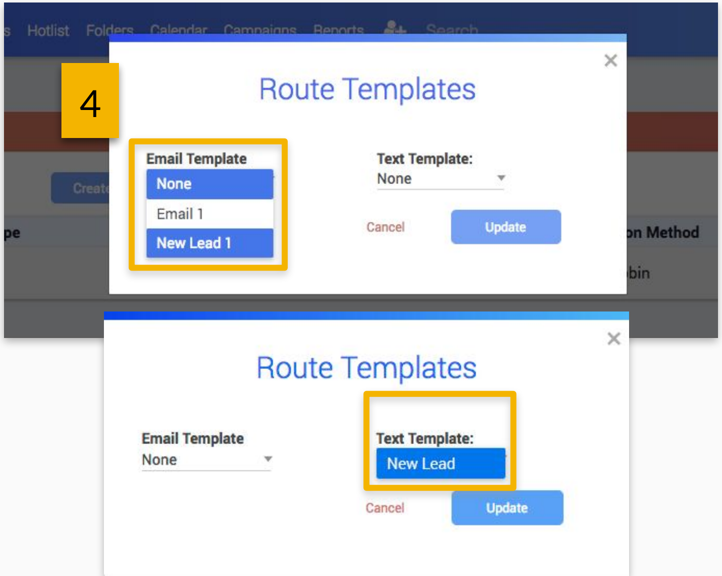






Select the template icon

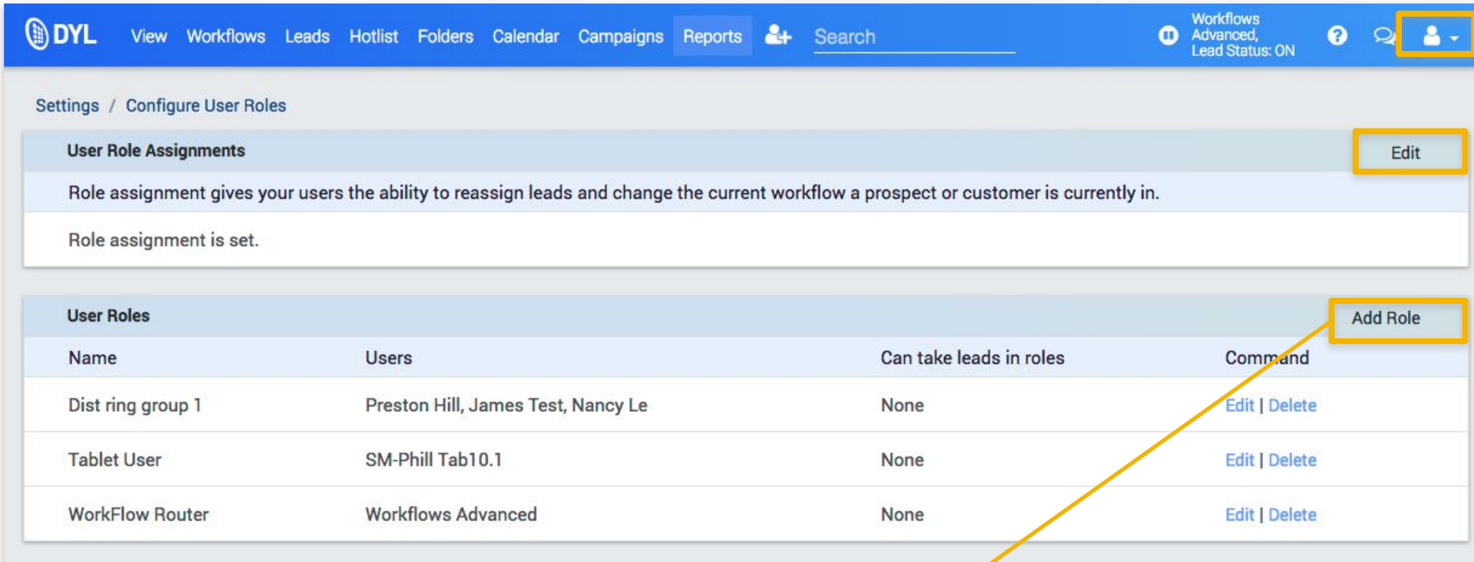
Choose your Email and Text Template, then “Update”.

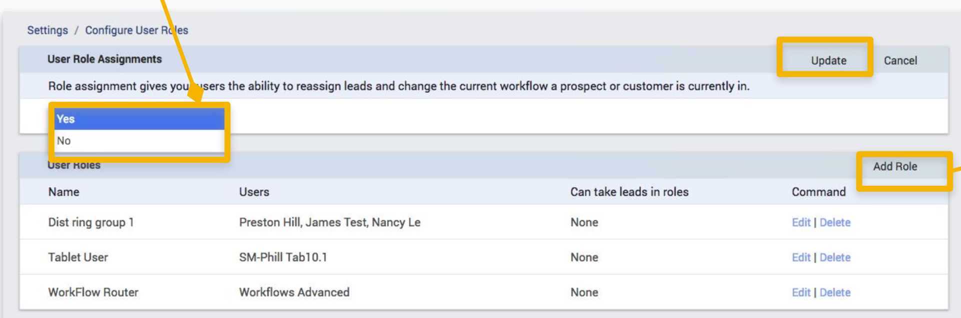


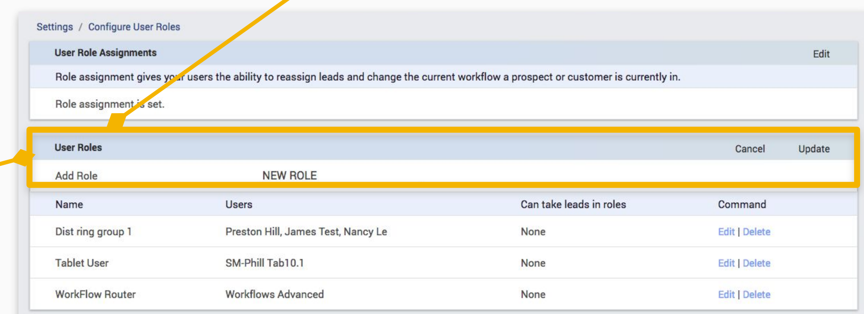
Settings / Configure User Roles

This screen will set up your User Roles (Sales, Service, etc) for different Workflows.

You can set permissions for re-assigning Workflows from one department to another (Sales to Service, for example).







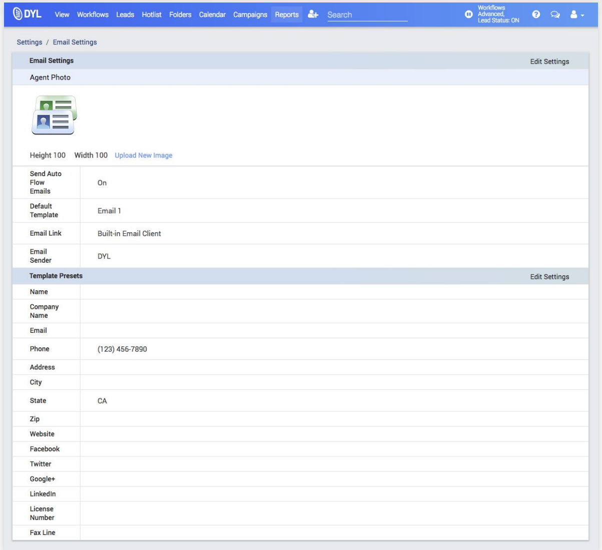
Workflow Settings

IMPORTANT
Global Settings/Permission Page

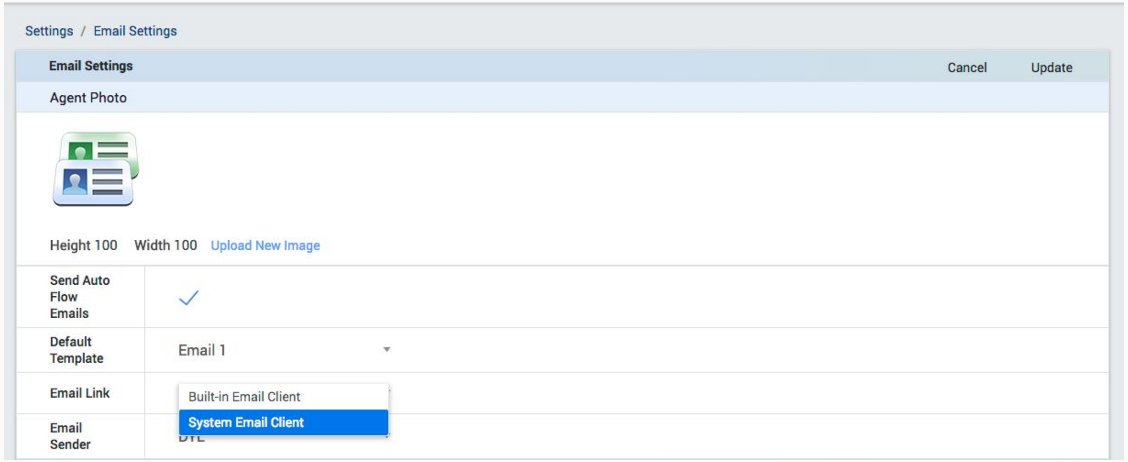
Before Creating a Workflow:

You will need to create user roles and enable permissions **before creating Workflows.**

IMPORTANT You may either send your emails through DYL or configure your external email provider. *Visit our Help page for more information.*



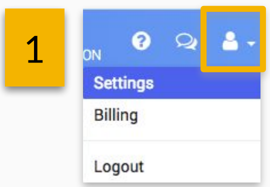
CONNECTING TO EMAIL PROVIDERS

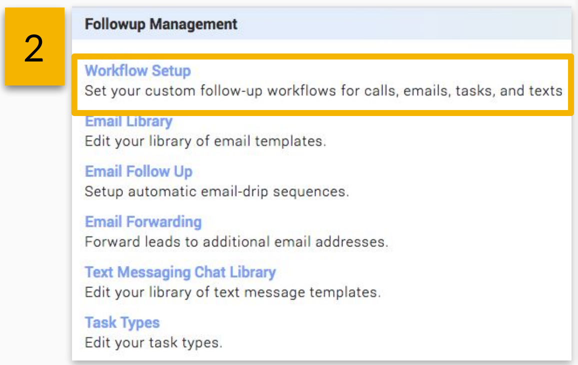


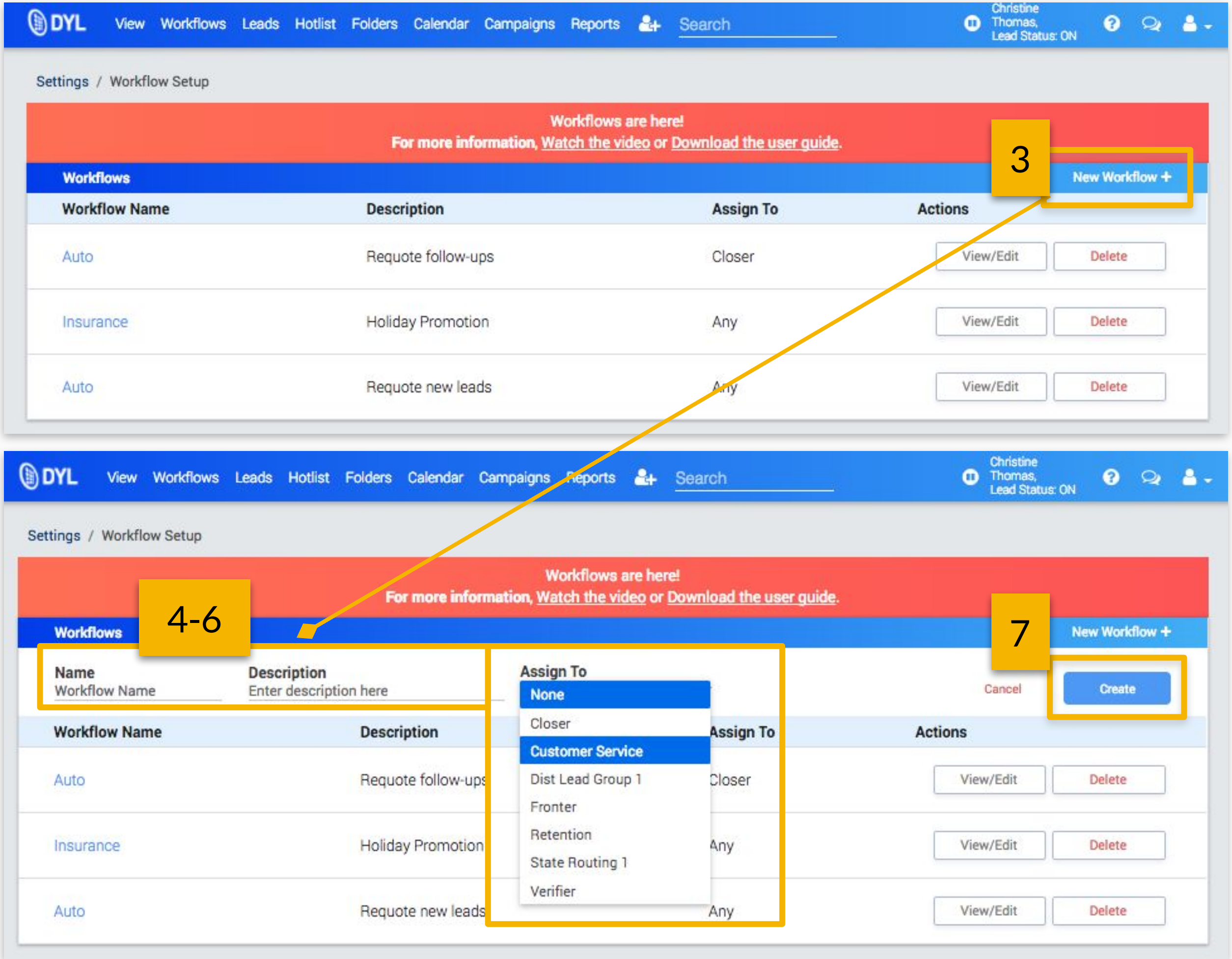
Settings > Workflow List

To create a new Workflow:

1. Go to Settings
2. Workflow Setup
3. Click New Workflow
4. Name your Workflow
5. Add a description
6. Assign to (by role or user), then:
7. Click Create

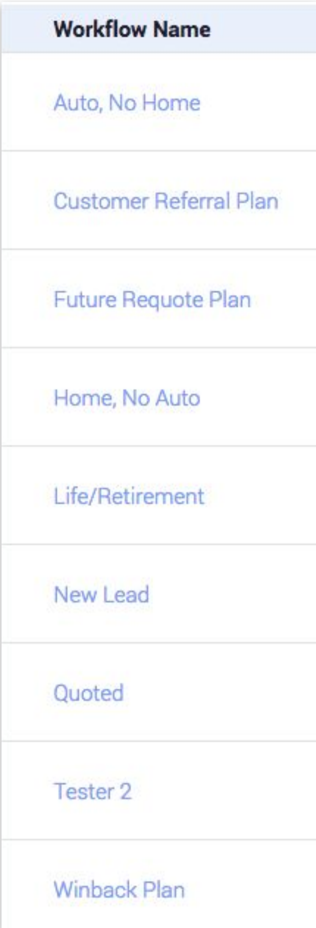




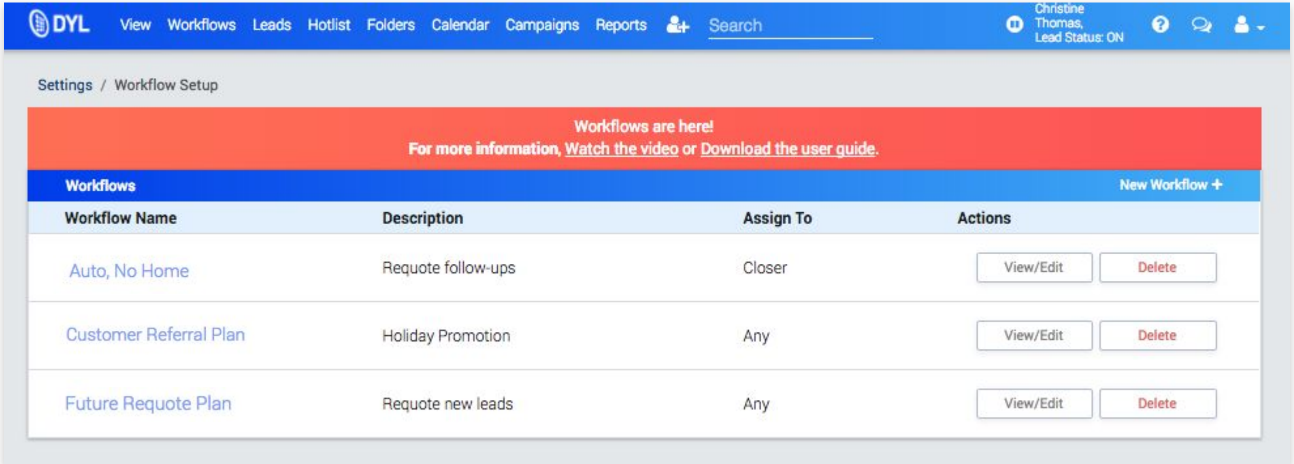


Workflow List

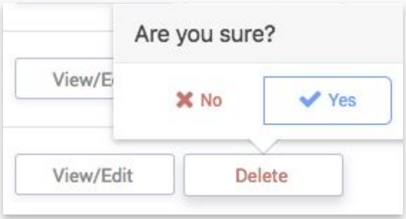
Use a pre-set Workflow



Choose from several pre-set Workflow sequences
You can use as-is or customize to your business need.



Confirm if deleting



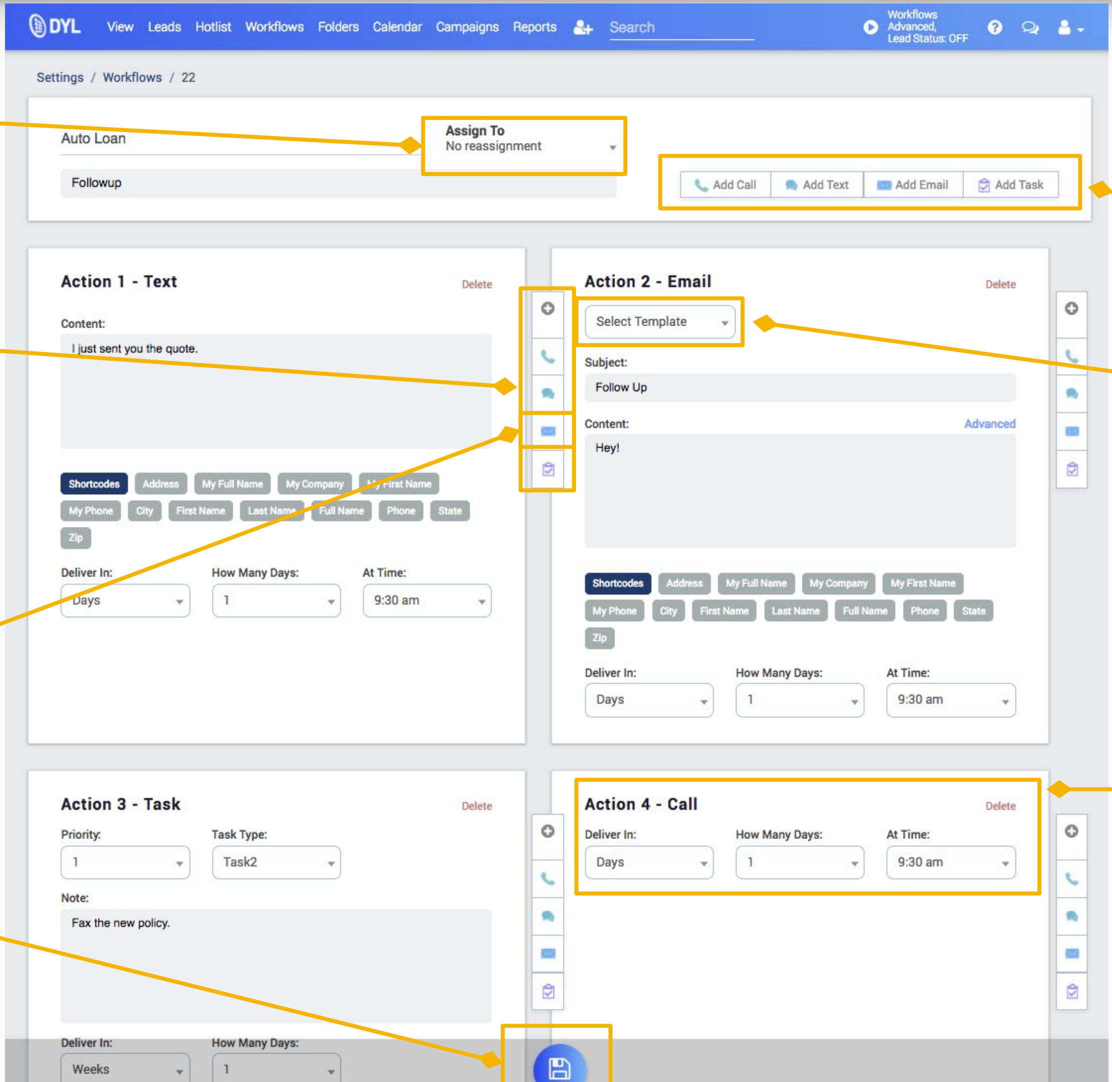
Settings
Workflow Creation/Editing Page

Assign to (if you haven't already) or **edit** who receives the Workflow Assignment.

Add to your Workflow: by clicking one of the icons to add a:
- Call
- Text
- Email
- Task

NOTE: after adding a new action from the icon bar, a new item is directly added to the right (of wherever inserted from).

Global Save Button
Save your items at once after creating all your Workflow Actions.



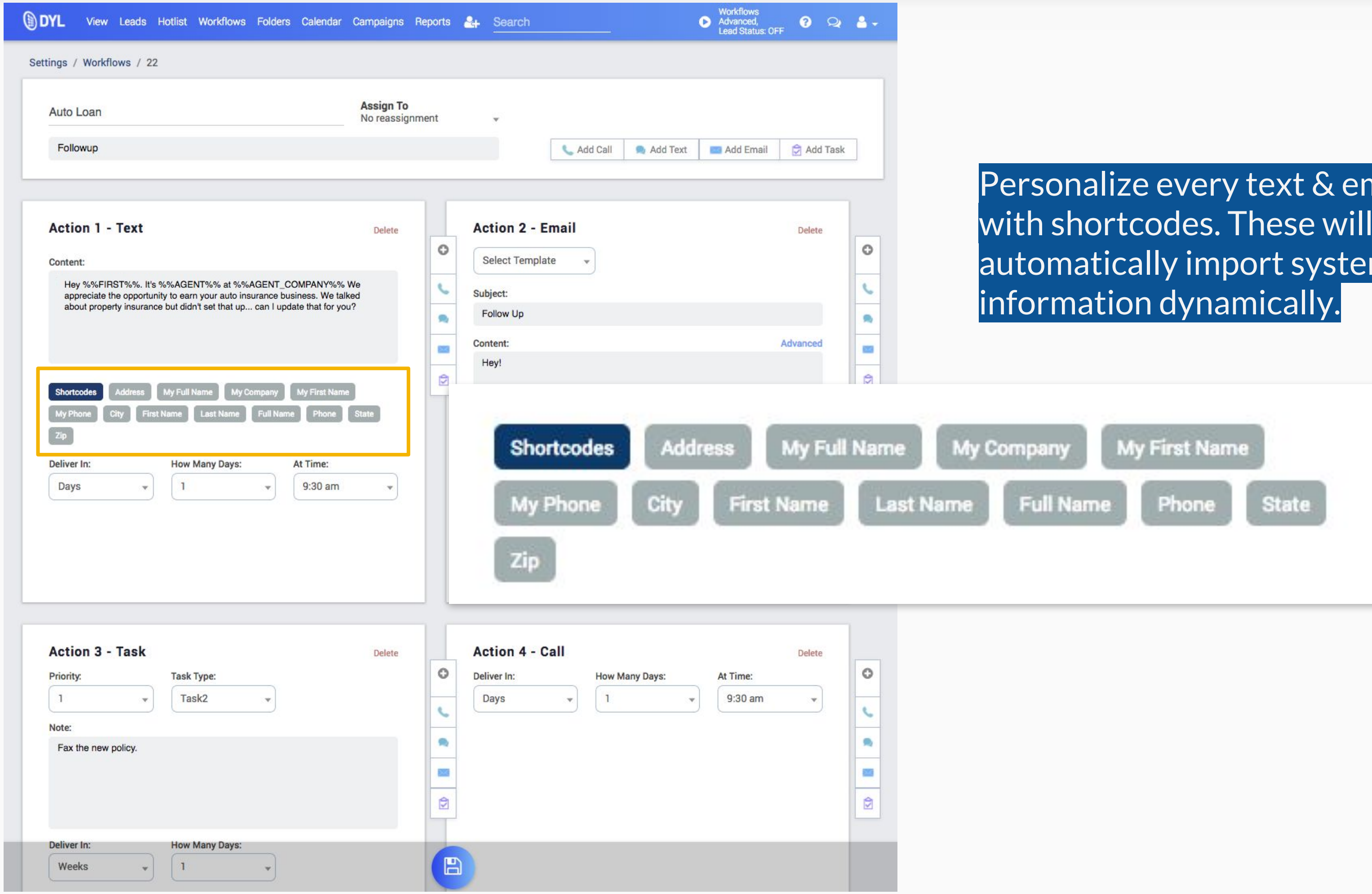
Add your first workflow item by clicking one of these buttons

Select your template

Customize
Your delivery times for each action

Workflow Setup

Shortcodes



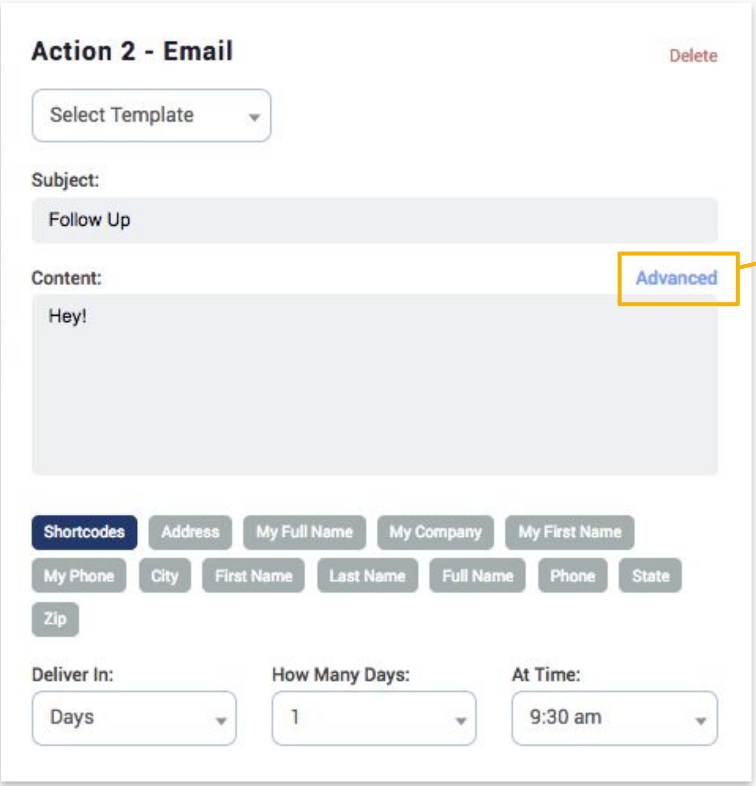
Personalize every text & email with shortcodes. These will automatically import system information dynamically.

Advanced Email Options

New Customization!

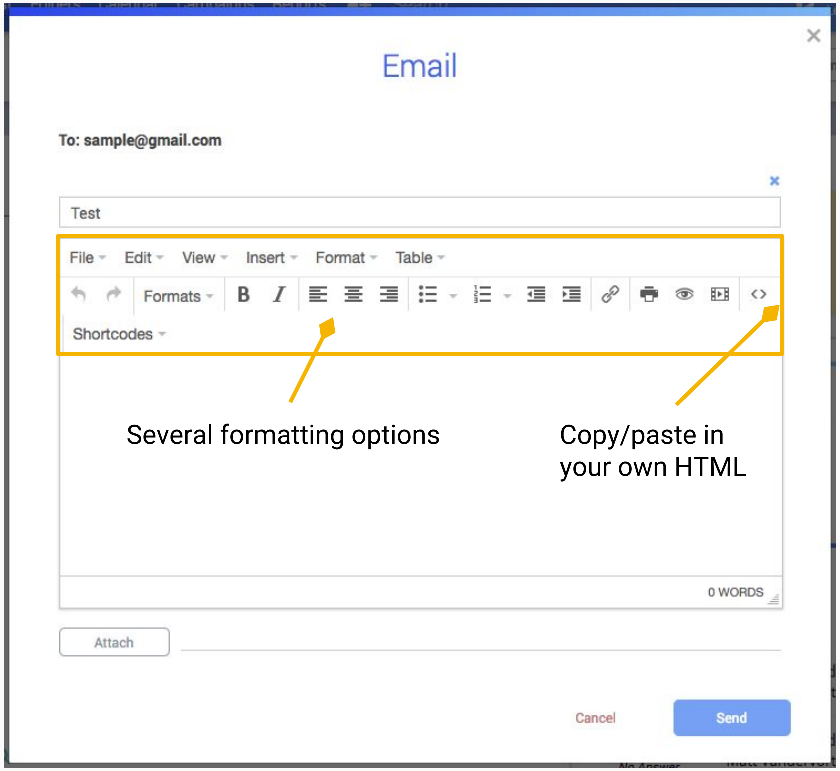
Customize your emails using our **Advanced** feature for formatting, attaching, and inserting HTML, and more!

Note: This option is also on Lead Details.



Click "Advanced" to see more options

Email Template *(Advanced view)*



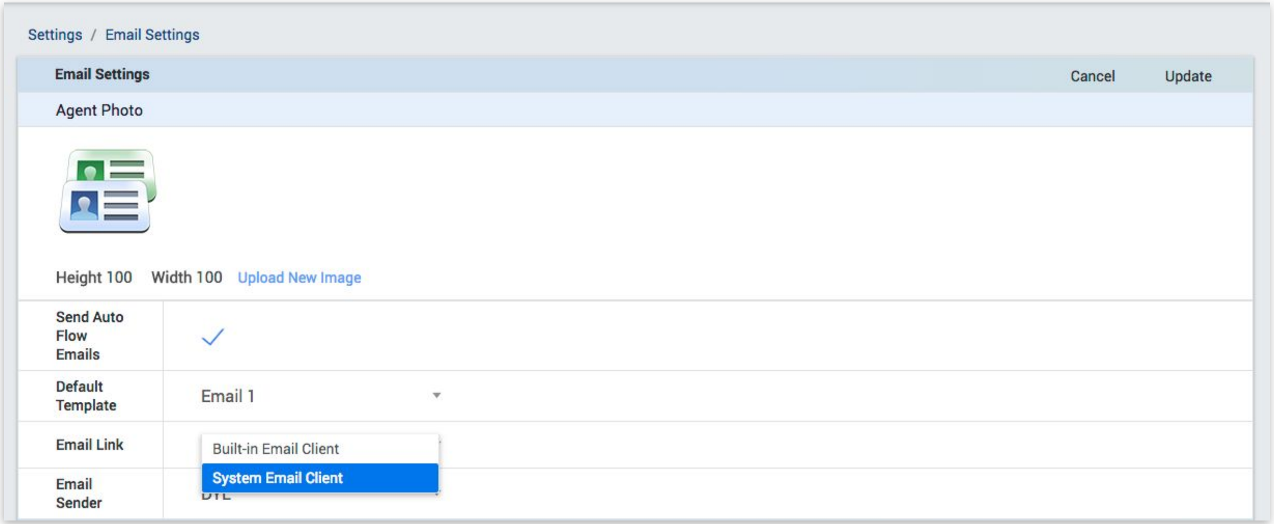
Emails

New Customization!

- Users can set Workflow emails to go out automatically or manually.

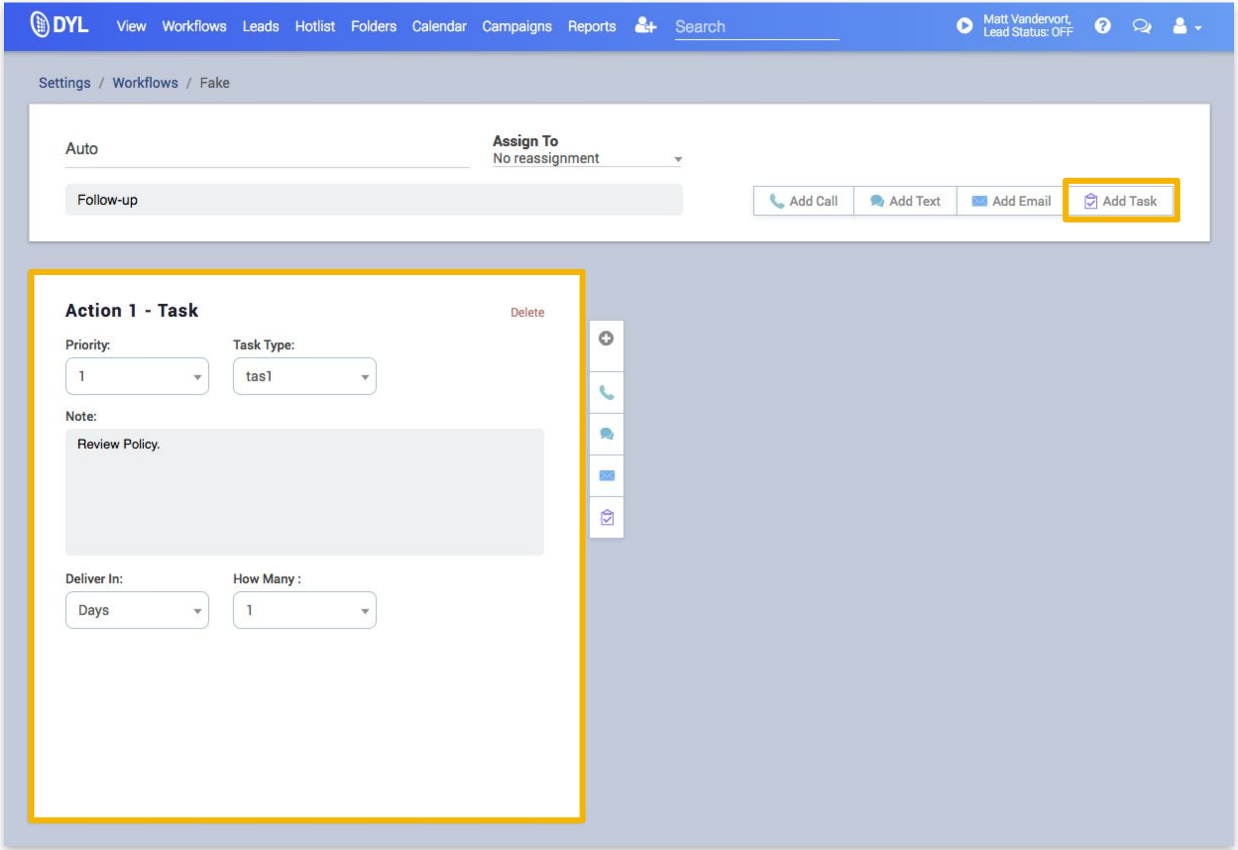
- If a lead unsubscribes from an email (or the user removes the email address from the lead's page), that will remove the follow-up emails in the Workflow.

Visit our Help page for additional information.



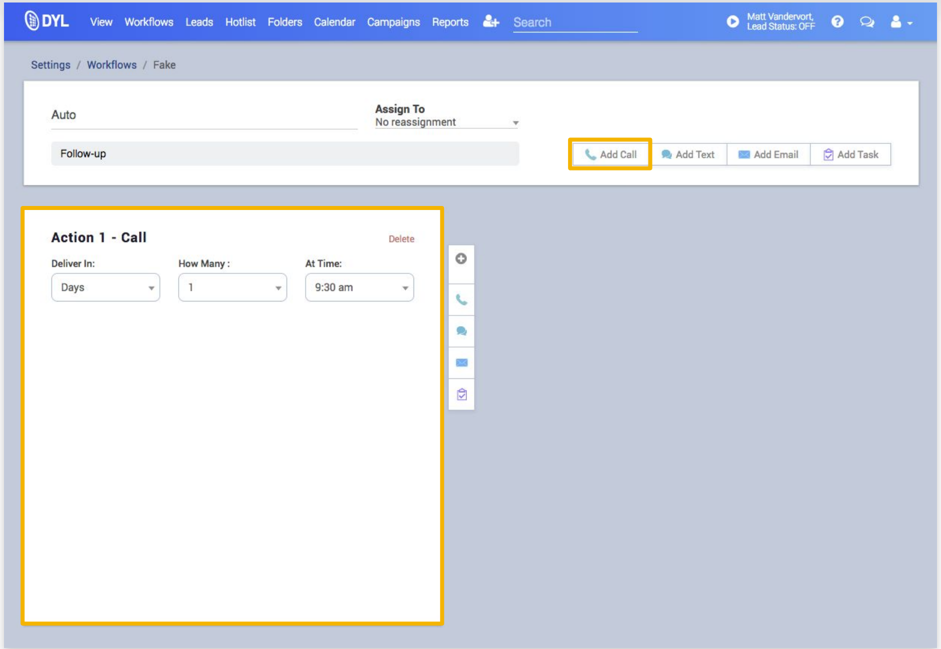
Task
Details

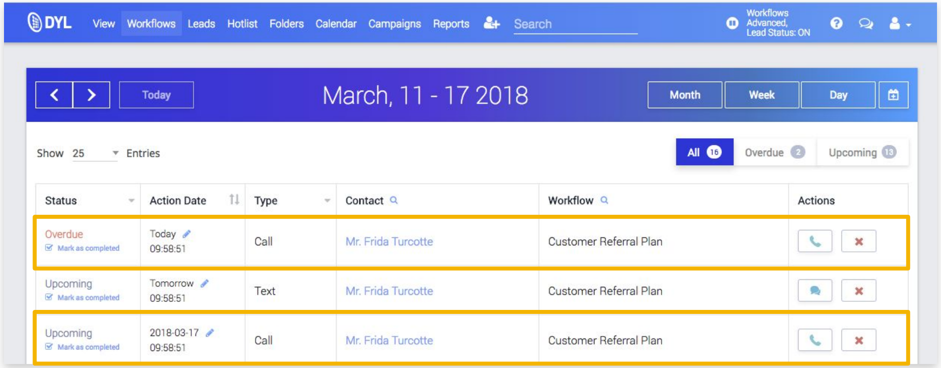
- Tasks consist of any activity that doesn't occur at a specific time.
- Users schedule tasks by date.



Call
Details

- Calls will ring a user's phone at the pre-set time. (Users MUST be unpaused and not on a system initiated call).
- If the user is on another system initiated call , the new Workflow call will wait in the "Call Now" queue.
- If the user is on an inbound or manual outbound call, the Workflow call will attempt to ring the user.
- Missed calls will be marked as Overdue (missed).
- Once the user makes a Workflow call attempt, it will be marked Complete.
- Missed calls will be marked as Contacted after a successful call attempt (click-to-dial call, inbound call, etc)



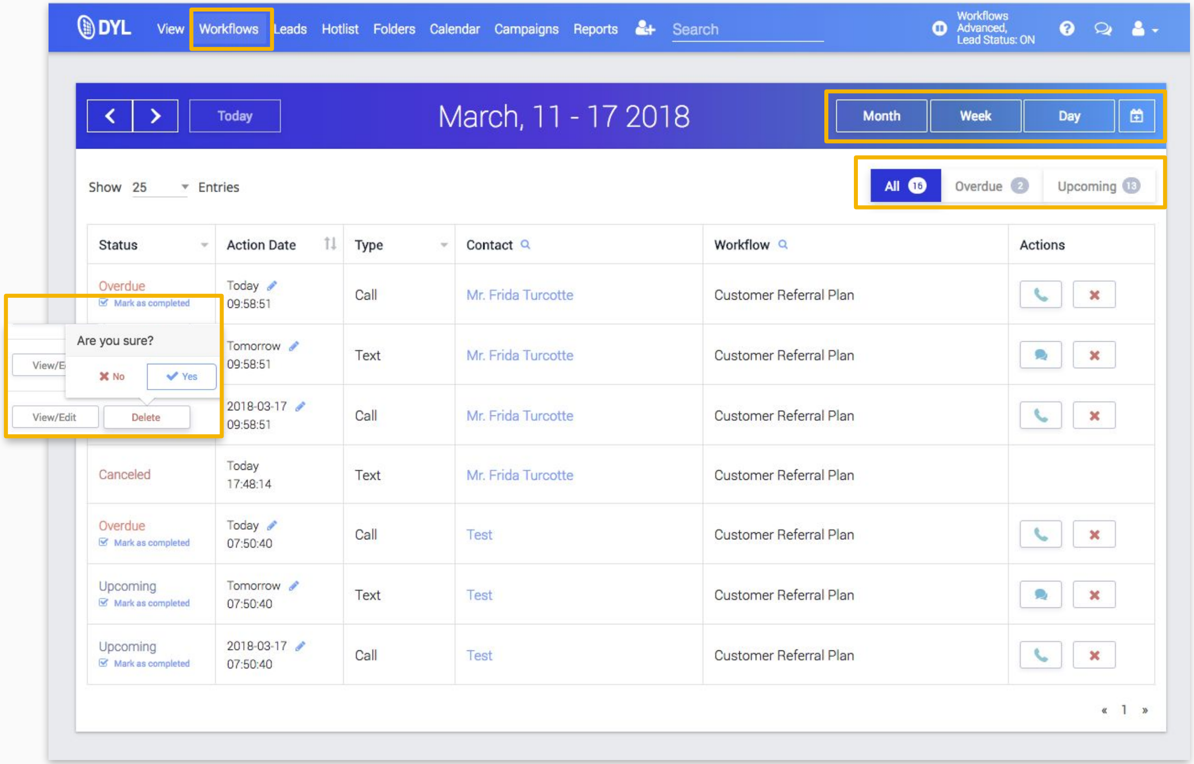


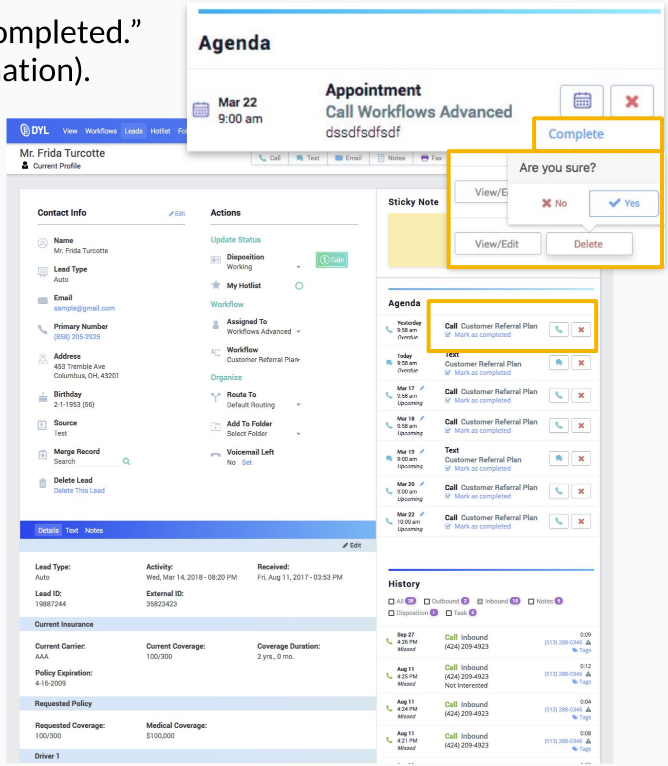
Workflow Dashboard

Workflow Dashboard + Lead Detail

Shows All Activity

- Rescheduling an action item (call, text, email, task) will reschedule ALL remaining items in the workflow by that amount of time.
- Users can perform/edit or cancel individual action items in the workflow from the Workflow Dashboard or from the lead's page.
- After a user completes an action item for the day, the item will be "Marked as Completed."
- Users may also individually mark an item "Completed" manually (with a confirmation).



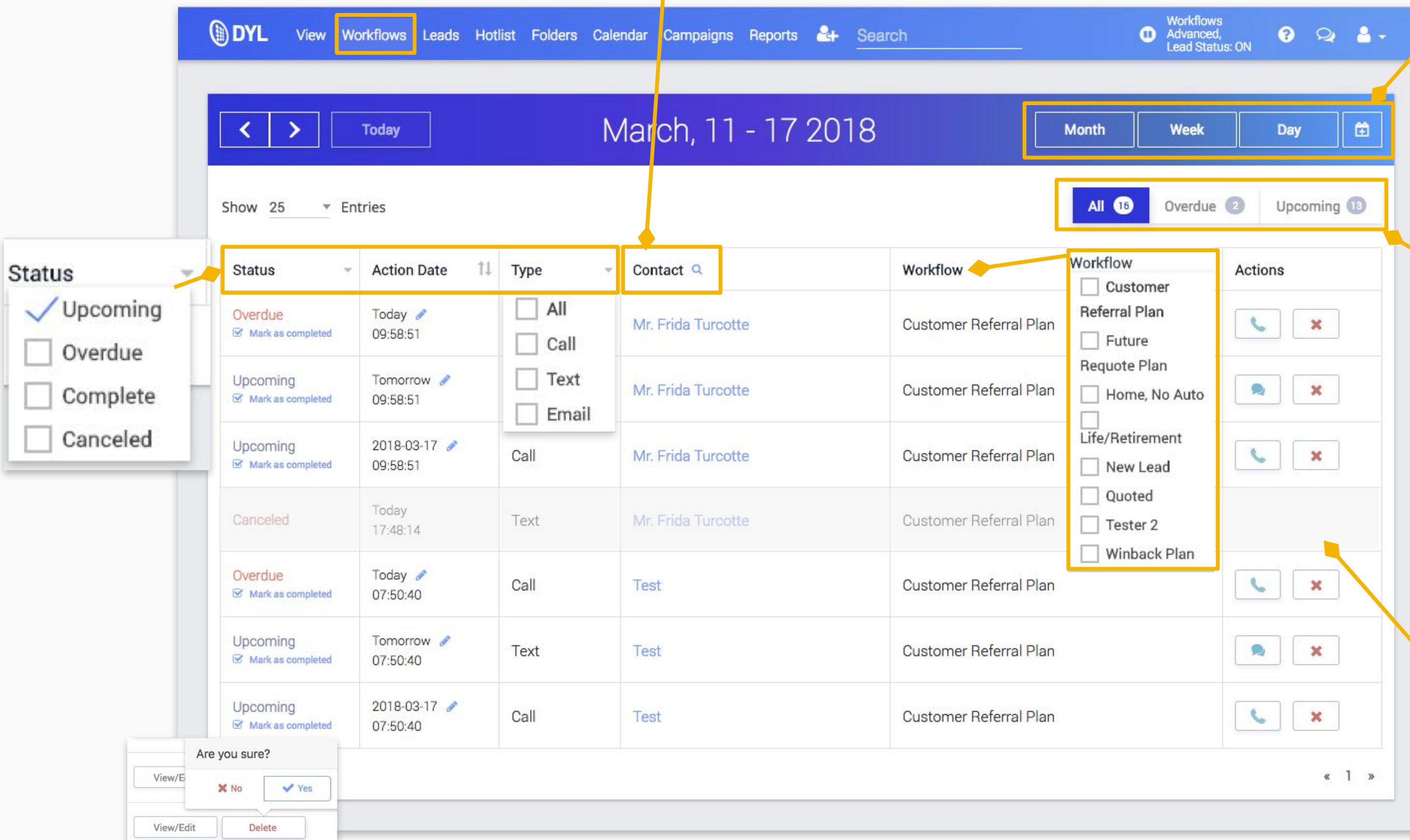


NEW Workflow Dashboard

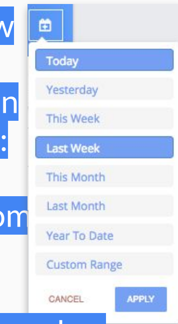
Shows All Activity

The new Dashboard allows you to see all of your follow-up items at a glance.
Sort by: Status, Action Date, Type or Workflow.

Search by Contact



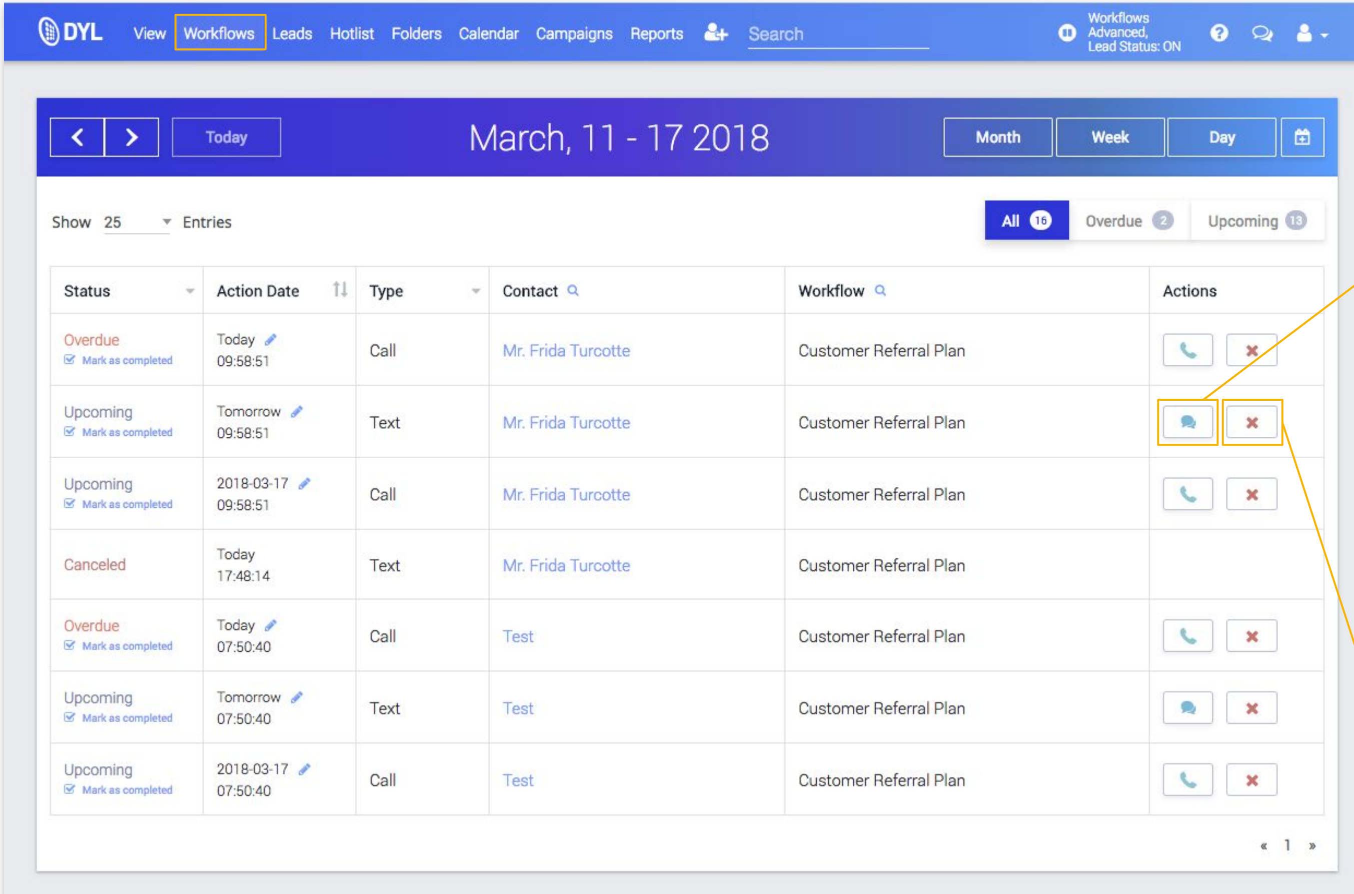
The Workflow dashboard displays action items by date: month, week, day or a custom range.



Filter by: Overdue, Upcoming, and Completed leads.

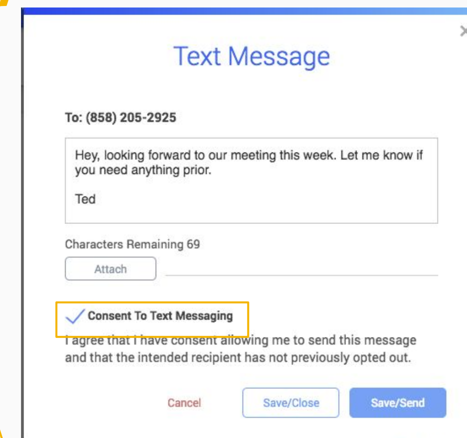
Completed or cancelled items go to reporting.

Workflow Dashboard
Edit Mode



To edit, send or cancel texts and emails before going out.

Click the icon to display the modal



Cancel your workflow action

- Workflow texts must be sent manually each day.
- Users must confirm they have consent to text the recipient.
- Texts will only go out during business hours.

Pause "On" or "Off": If you're paused, then everything is offset and go into "Missed."

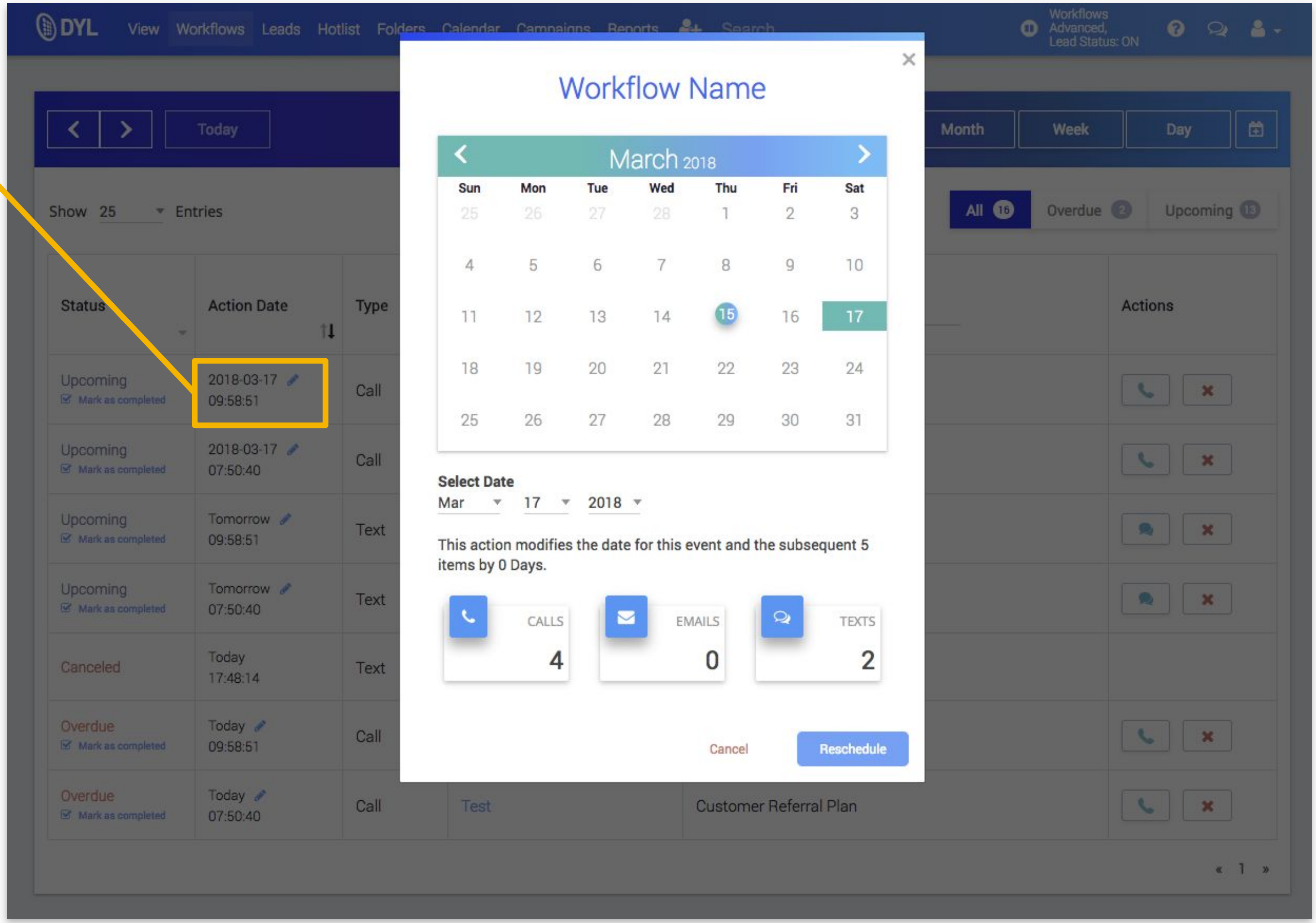
Reschedule Your Workflow

Reschedule your Workflow's delivery date.

Note: this will change all subsequent events in that workflow.

1) It will be possible for some events to be scheduled after hours.

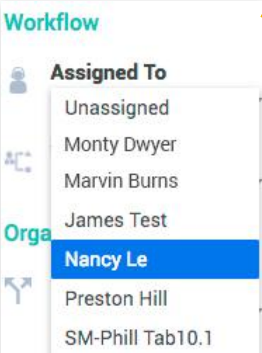
   Note: When events are completed after hours, the user will need to check off the "Mark as completed" box on the Dashboard or Agenda (on Lead Details).



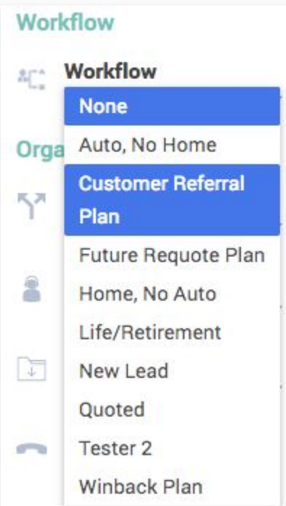
Assigning Leads to a Workflow

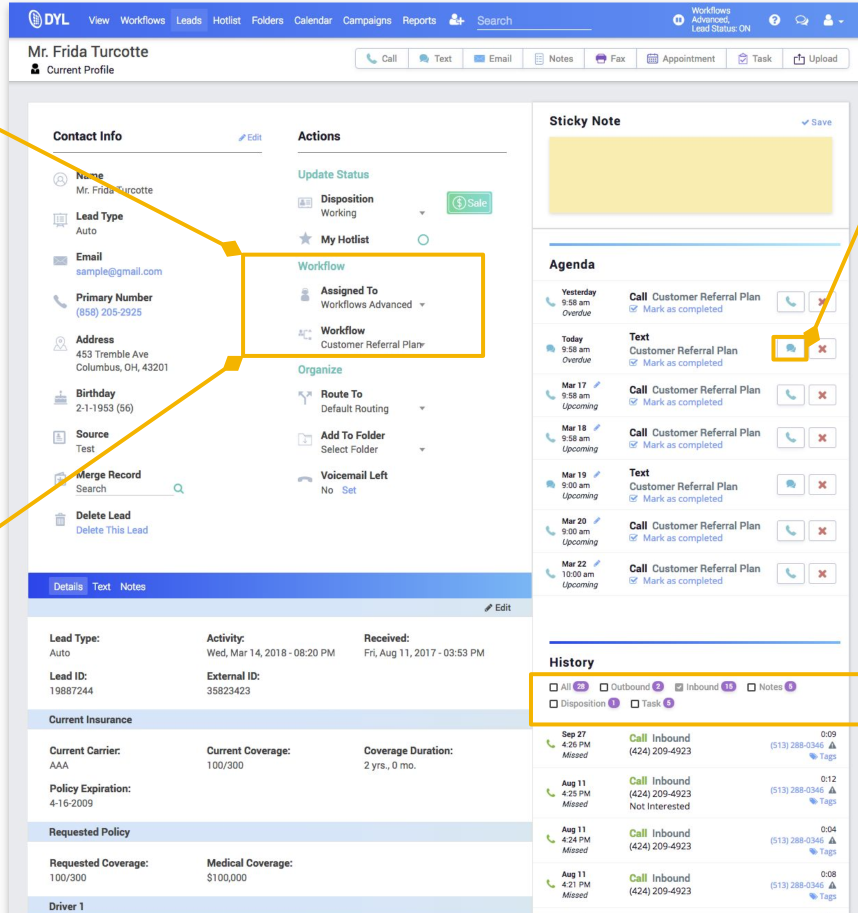
New Lead Details page

Assign a Workflow

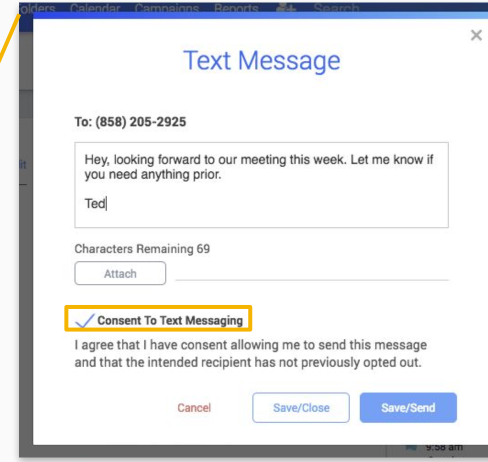


Select a Workflow





Edit, Send or Cancel your action item



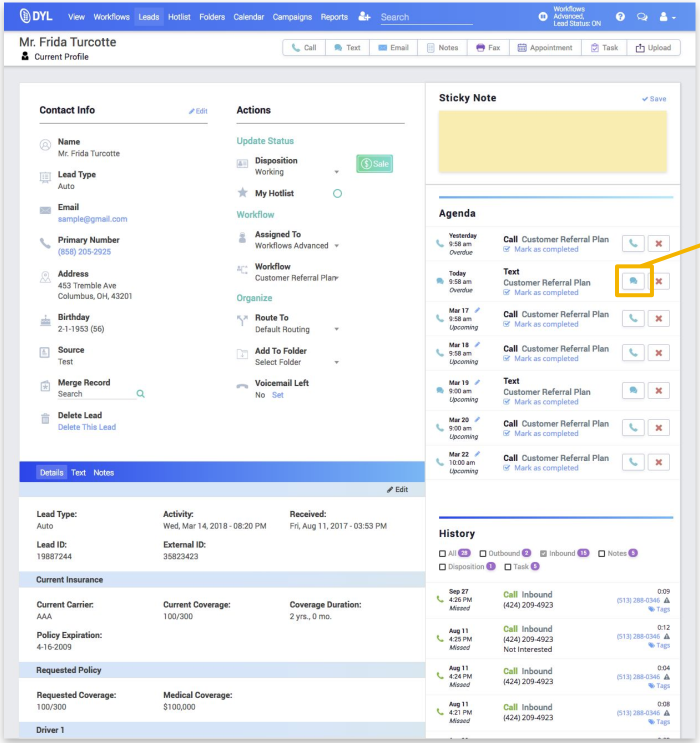
Customized filters: Select checkboxes of what you want to see in History: *all, outbound, inbound, notes, dispositions, tasks + uploads*

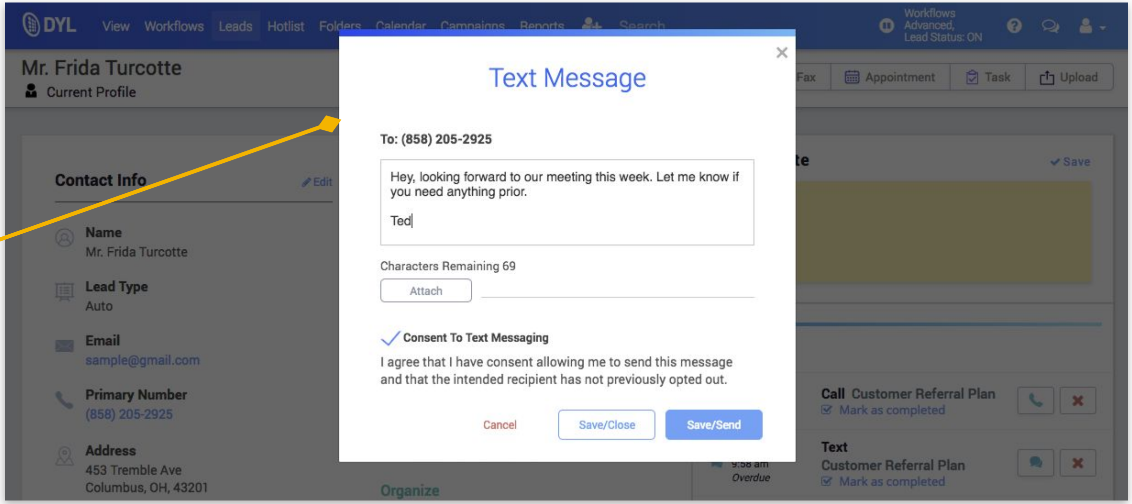
***NOTE:** After moving a lead into a Workflow, it will assign it to yourself.*

New Lead Details
Agenda: Workflow Actions

NEW FEATURE: View your scheduled Workflow Actions from the Agenda.

- Edit or cancel Workflow Actions from here.
- If you complete an Action outside of the system, check "Mark as Completed."





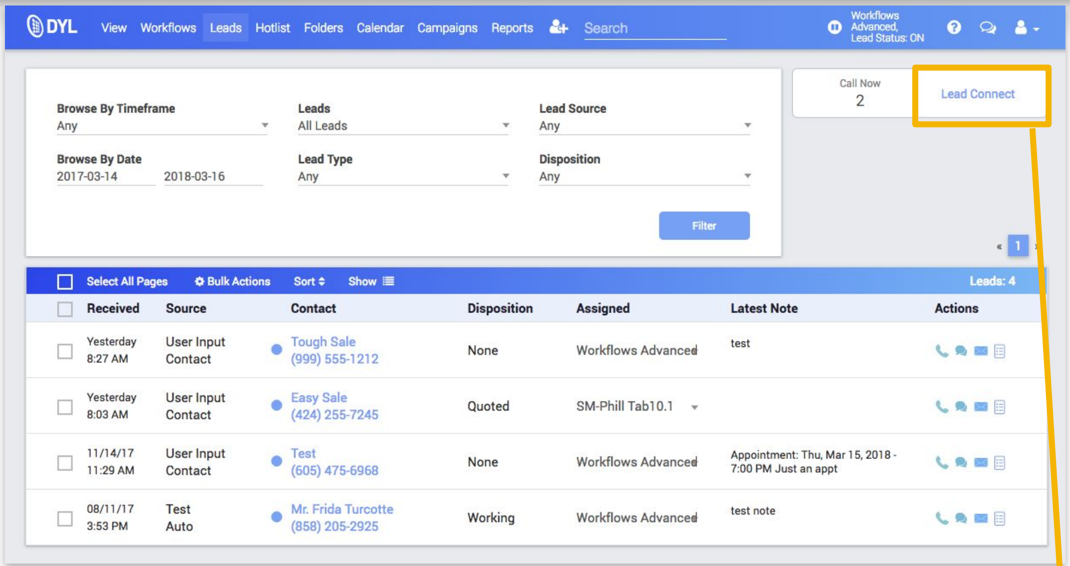
Lead Connect Report

Lead Connect > Reports

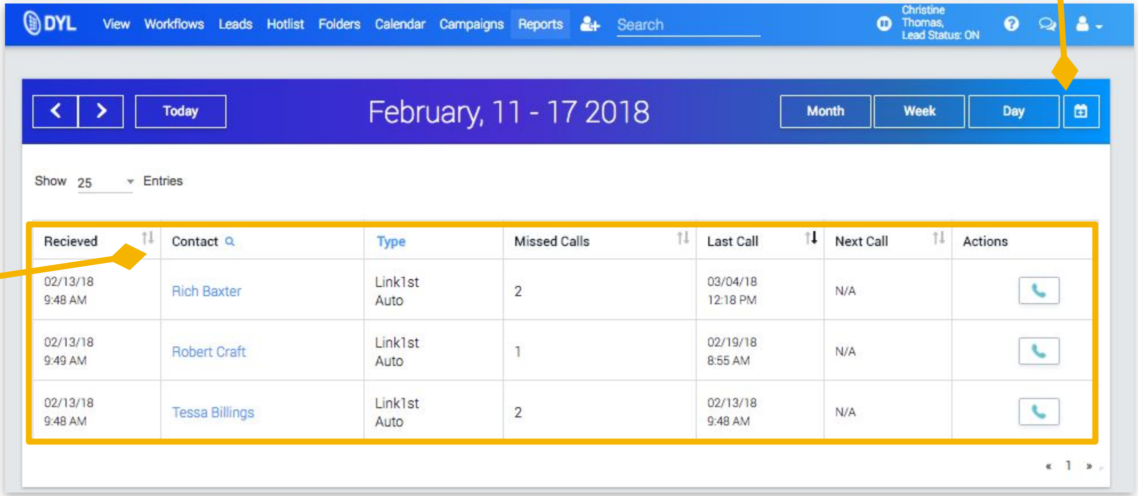
This Leads page shows your unassigned, uncalled internet leads (real-time leads, contact forms, etc).

Once leads are assigned, they will move to Workflows.

Note: This does not show live transfers or inbound calls.

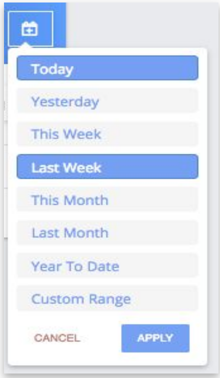


This links to your uncalled Report



Filter by ascending or descending order

Customize your Date ranges



Removing Workflows

Removing a lead from a Workflow

- Once a user marks a lead as Sold, that automatically stops the existing Workflow.
- Marking a lead as Do Not Call or with a Bad disposition (Bad Lead, etc) will also stop the Workflow. You can specify Bad dispositions in Settings---> Customize Dispositions

Settings / Customize Dispositions

Add New Disposition Add New Disposition

Deleting a disposition will set all leads with that disposition back to **None**.The disposition history for that disposition will also be permanently deleted.

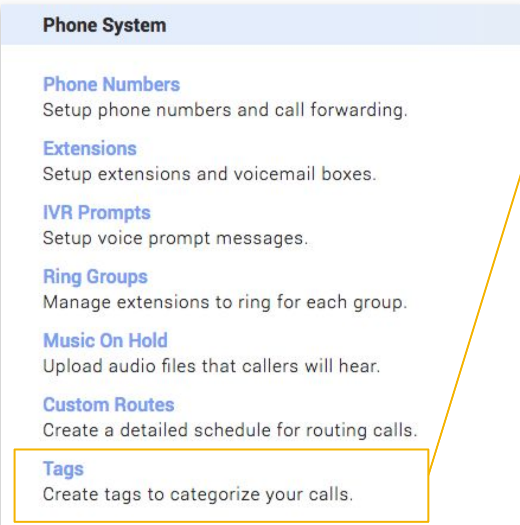
Disposition List Edit Dispositions

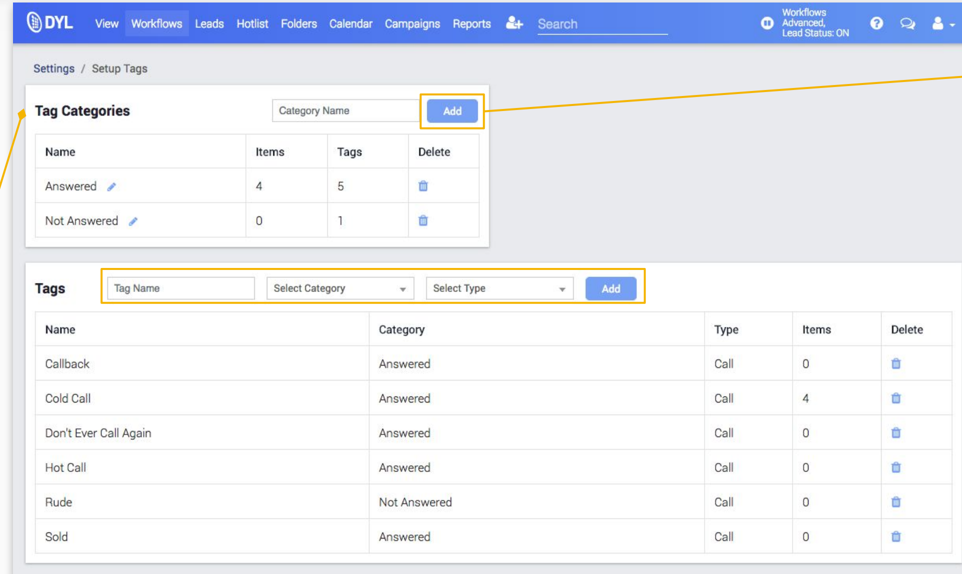
Name	Good	Other	Bad	Call-Back	Customer Status	Show	Command
Already Sold		✔		Remove	Current Customer	In Pop-Up List	Delete
Bad Lead			✔	Remove		On Page	Delete
Cancelled			✔	Remove	Cancelled Customer	In Pop-Up List	Delete
Do Not Call			✔	Remove		In Pop-Up List	*Required*
New Sale	✔			Remove	New Sale	On Page	Delete
None		✔		Remove		In Pop-Up List	*Required*
Not Interested			✔	Remove		On Page	Delete
Not Qualified			✔	Remove		On Page	Delete
Quoted	✔			Remove		On Page	Delete
Working	✔			Remove		On Page	Delete

Call Tags

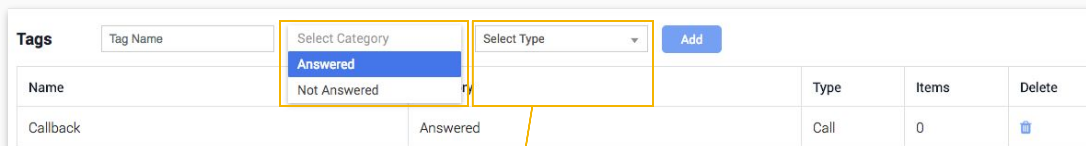
Call Tags
Set-up

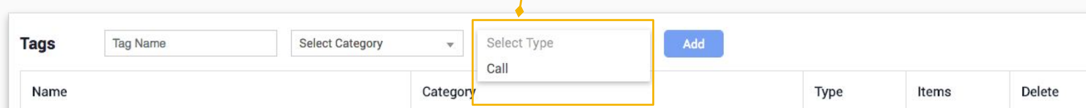
New Feature: Tag your calls for better tracking and reporting. Enhance your company's training, sales, customer service, etc.





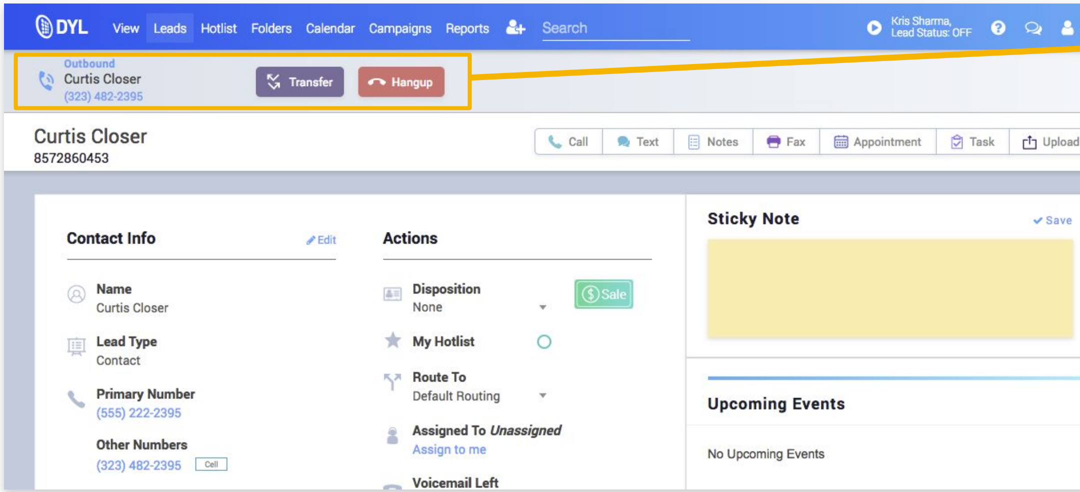
Add new Tag Categories

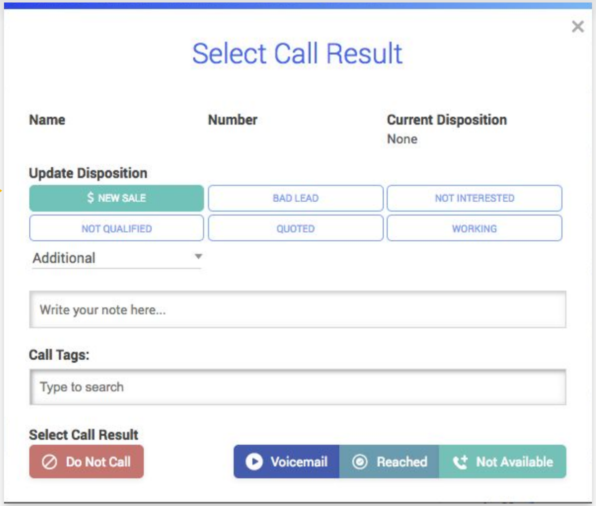


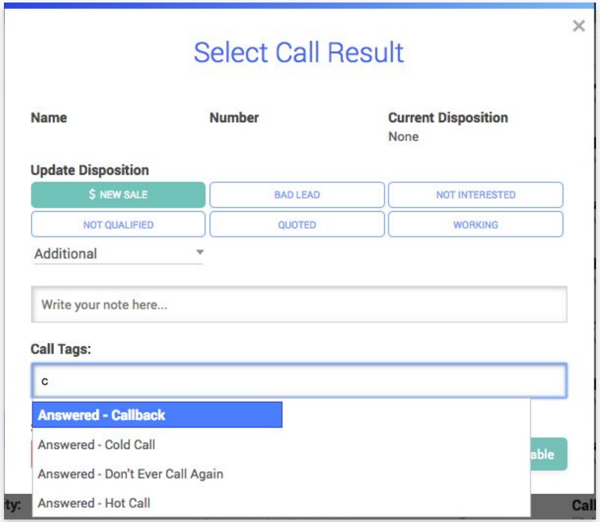


Users with settings access will be able to create/remove tags and tag categories.

You will now be able to associate a tag with a call result.



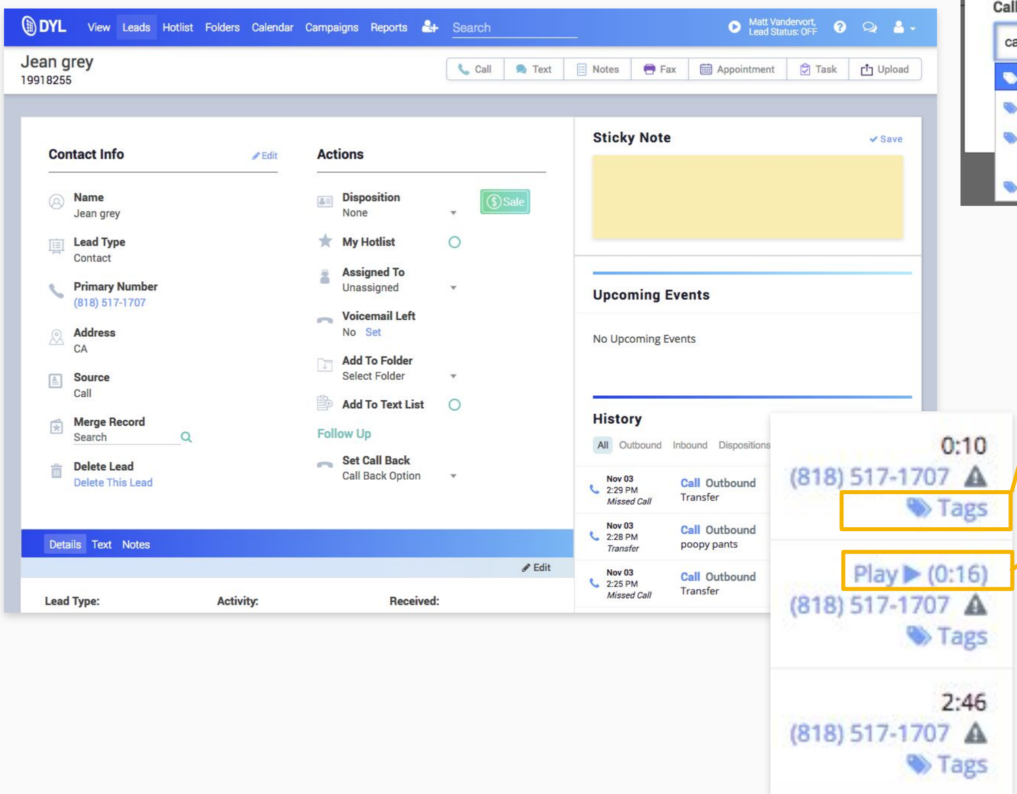




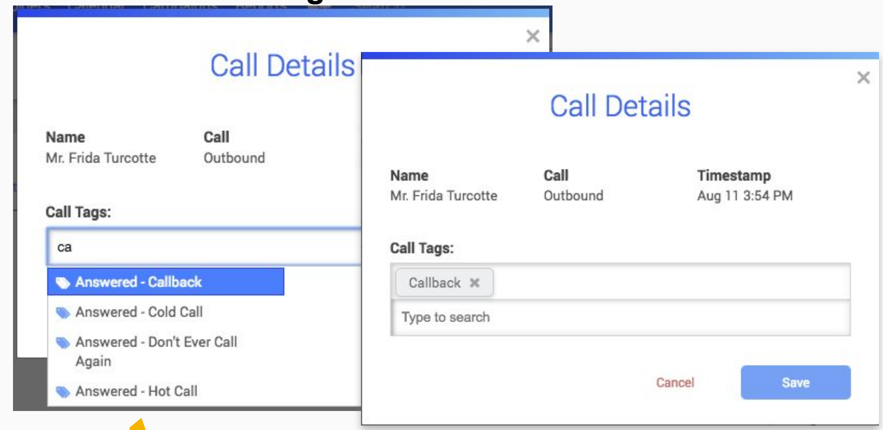
Call Tags
Call Details

Call Recording reports can be filtered by call tags for inbound calls.

- A modal will display individual call tags when clicked for inbound or outbound calls.



Call Tags



Call Recordings