Nextiva CRM
Business Automation

VERSION 1.3

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Business Automation

Repetitive and often tedious tasks, such as notifying customers every time their Case is updated or sending out birthday/anniversary greetings, take resources and focus away from more critical tasks. To save time and resources, as well as to ensure nothing falls through the cracks, businesses can automate marketing, sales, and service tasks.

Use automation rules in NextOS to execute tasks based on predefined criteria.

The following components make up every automation rule:

- Trigger: An event or a specific date/time that begins the task.
  Examples:
  - Case is updated.
  - Account is created.
  - Contact's birthday.
- Action: The specific result that completes the task.
  Examples:
  - Send a text message or email.
  - Send a survey to the email associated with the Contact or Account.
  - Create a Case assigned to Billing with the Topic "Billing Questions."

Rules may also contain the following components:

- Condition: Requirements that need to be met before the Action will be performed.
  Examples:
  - Case Status is "Awaiting Response," and the Assignee is "Support."
  - Subject contains "Billing."
  - Contact Phone Number is "Not Null," and Primary Of is "Not Null."
- Wait Block: An amount of time that must transpire or a specific date/time that must be true before initiating the Action that completes the task.
  Examples:
  - Wait for 30 minutes.
  - Wait for five days.
  - Perform the Action on January 1, 2021.

Administrators can build automation rules from scratch or a template. Only Administrators with a license for Rules and Automation can create automation rules.

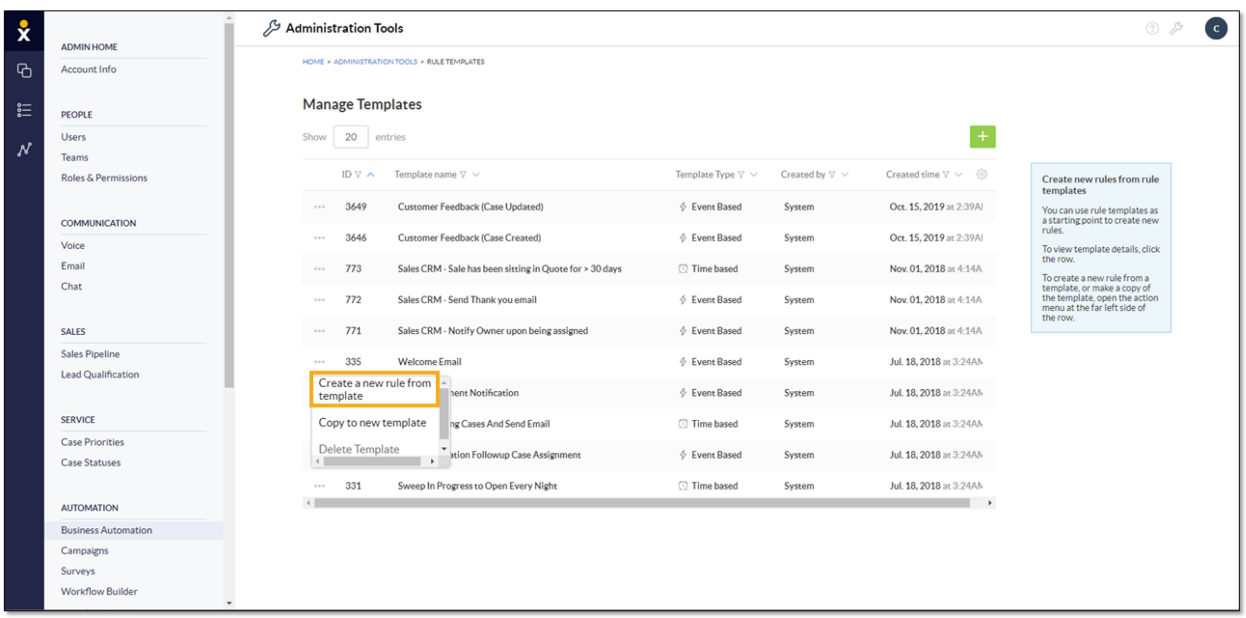
Use automation rules to automatically:

- Send email messages to customers.
- Send text messages to customers who prefer instant updates.
- Send a survey instantly or after a specified time frame.
- Create or update records in Nextiva CRM.

Creating Automation Rules From Template

Save time by creating automation rules based on any of the predefined templates for everyday business tasks, such as sending reminders or surveys, for example. Start with a template that best fits the task, then customize it to meet business objectives by modifying the automation rule components.

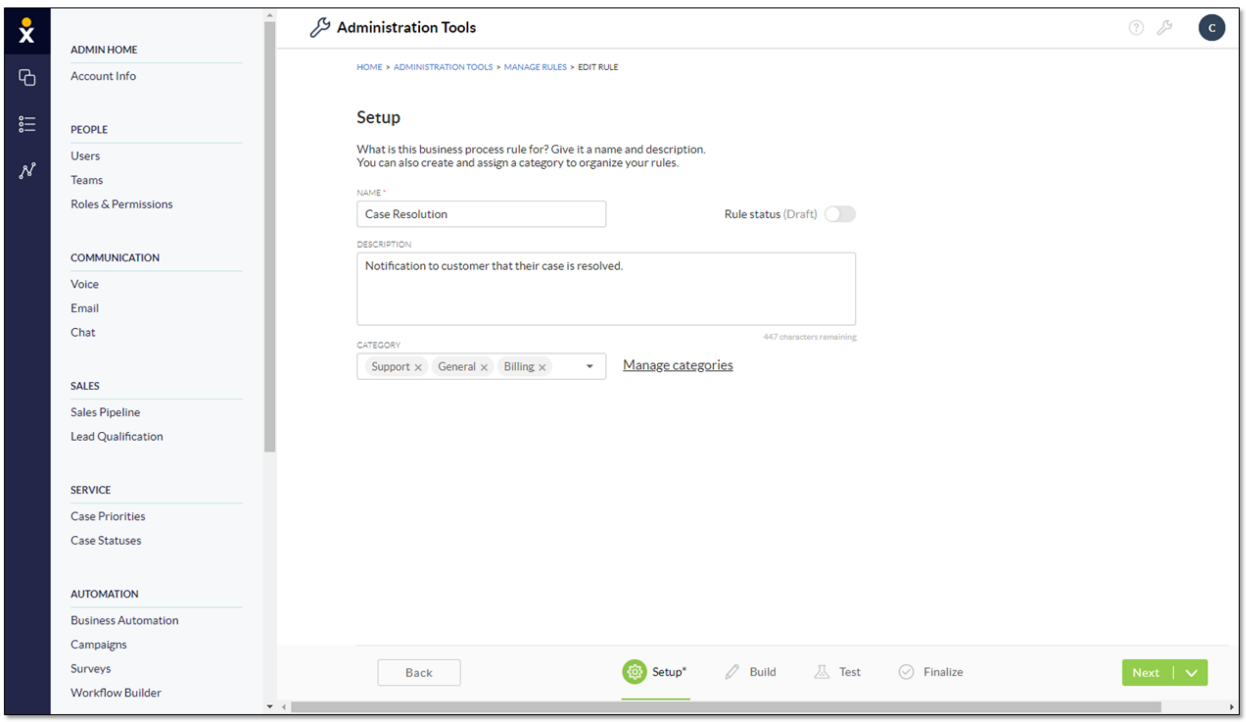
1. Visit nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
4. Under **Automation** in the left navigation panel, select **Business Automation**, click the **ellipses (...)** icon corresponding to the template and select **Create a new rule from template**.



Business Automation

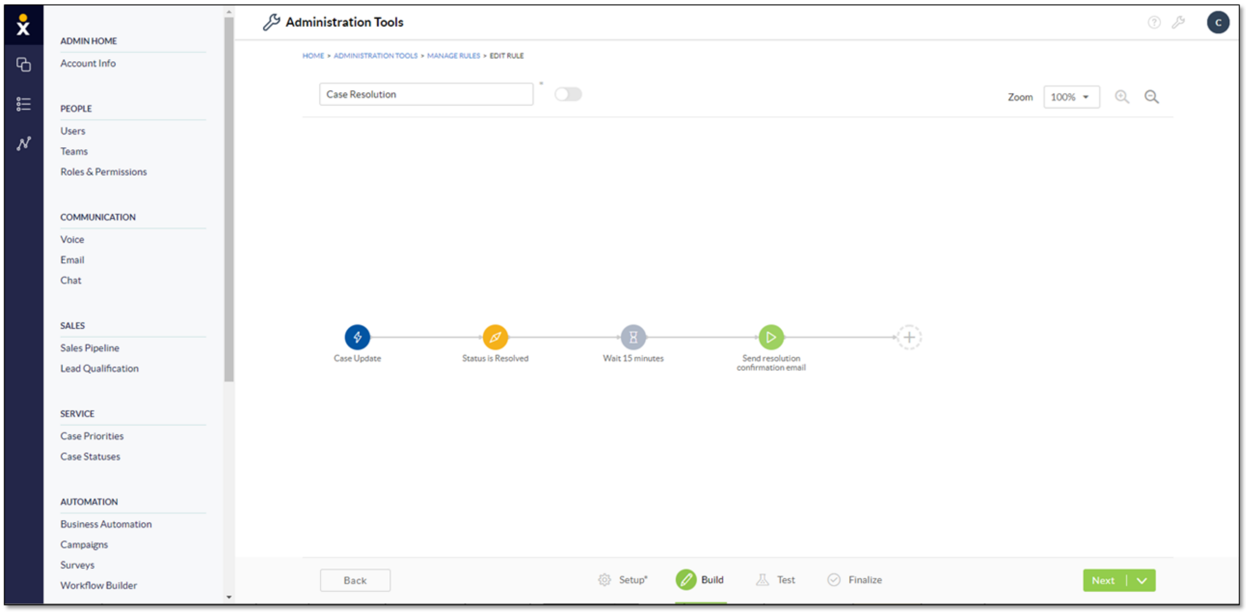
5. Click **Setup** in the taskbar at the bottom of the page, modify the information as needed, and click **Next**.
    - Enter a unique **Name** for the rule (at least eight characters) and a **Description** of the rule (optional).
    - Toggle the **Rule status (Draft)** switch to **ON** (green) to indicate that the rule is not completely configured.
    - Select a **Category** to help organize the rules.

      TIP: Administrators can select multiple Categories, as well as click the **X** to deselect any. To add a new Category, click **Manage categories**, then click **Add category** and enter a name in the **Category Name** field. Finally, click **Save**. The **Category** drop-down list will reflect the changes immediately.



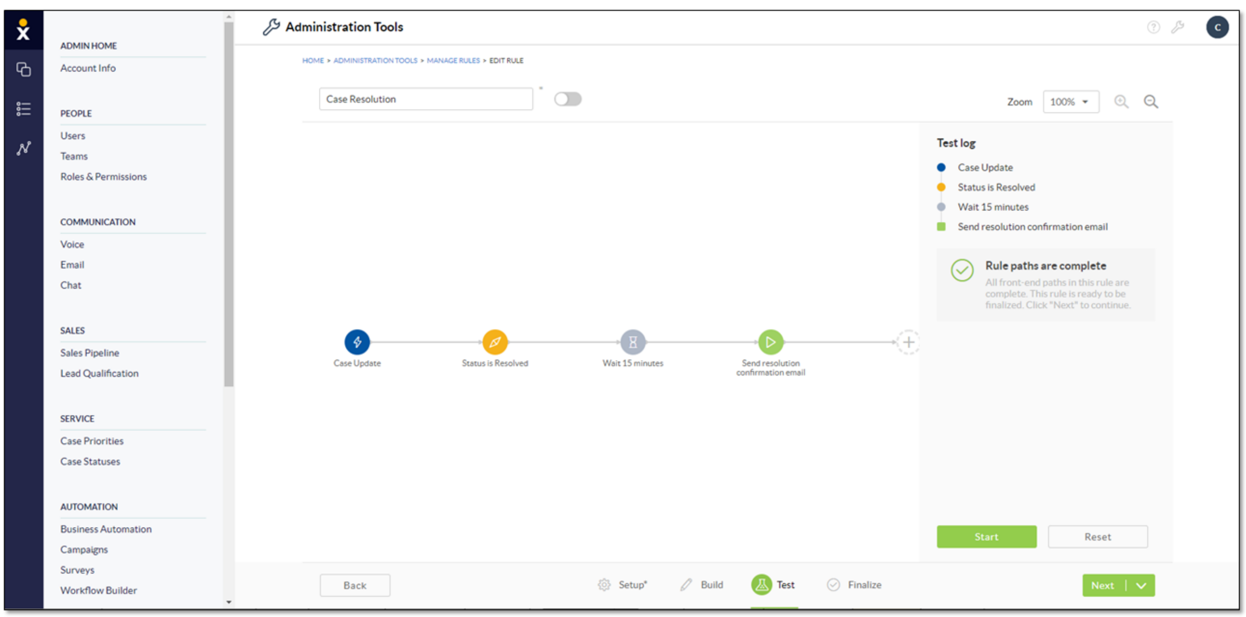
Setup Page

6. On the **Build** page, edit the components of the automation rule and click **Next**. For more information, click here.



Build Page

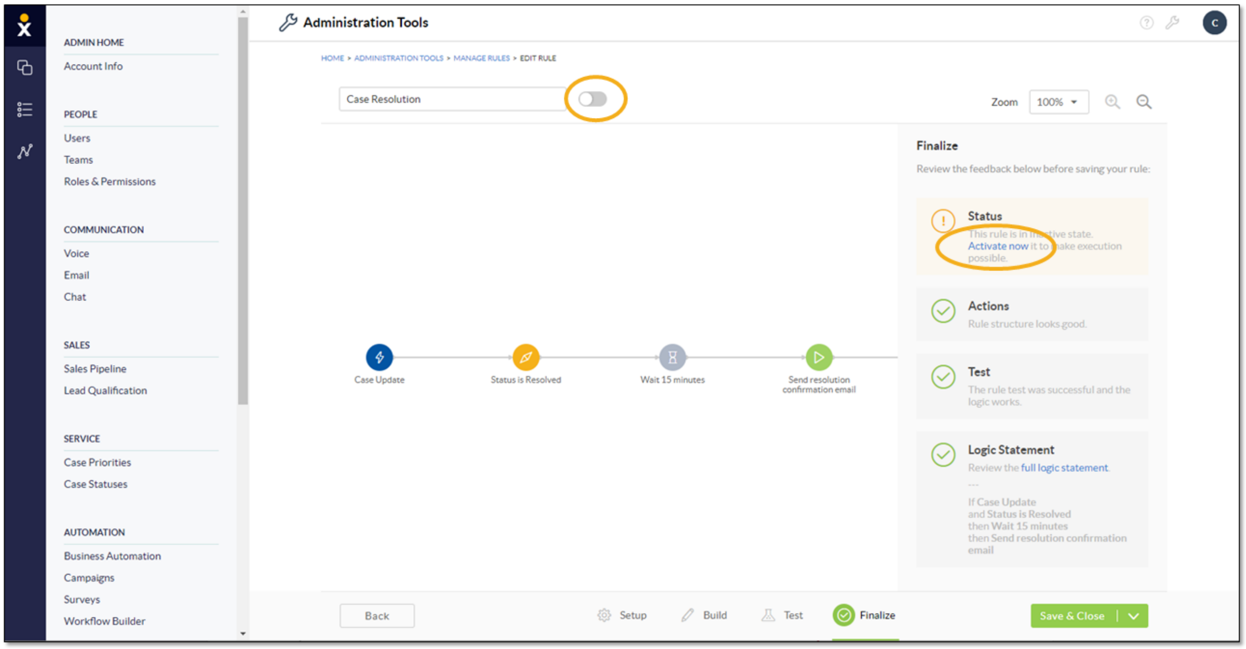
7. Click the **Start** button on the **Test** page to verify the rule, then click **Next**.



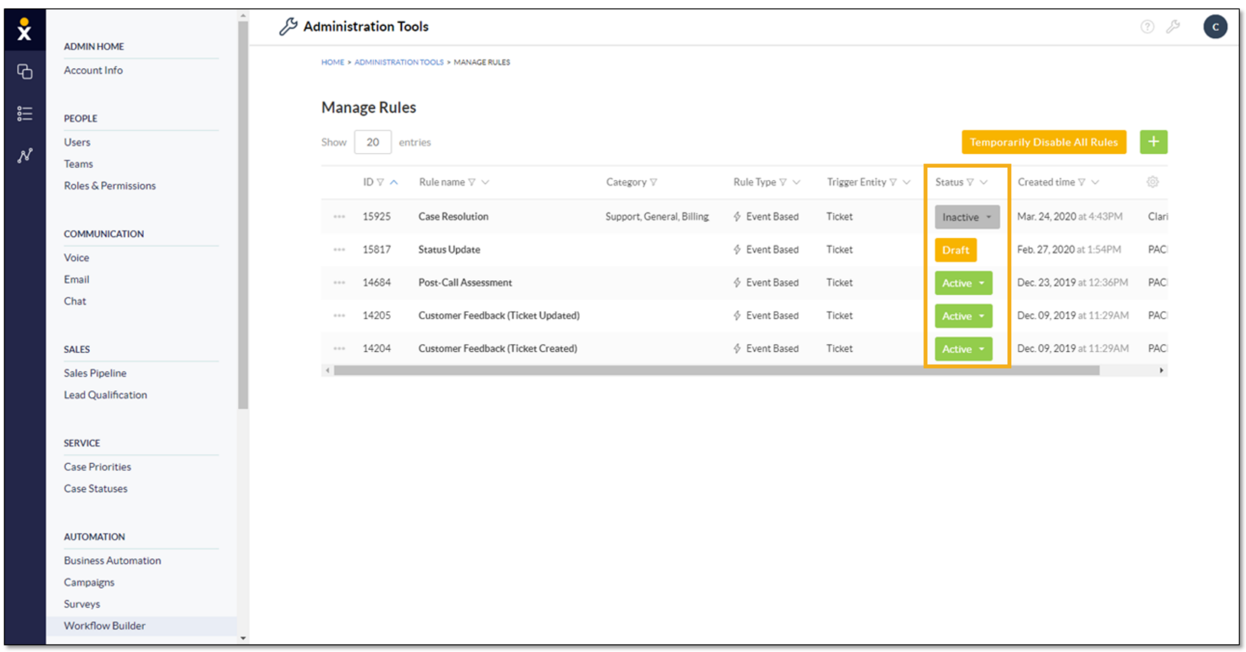
Test Page

8. On the **Finalize** page, review the feedback and click **Save & Close**.

NOTE: Click **Activate now** or toggle the switch next to the rule name to enable the execution of the rule. Otherwise, Administrators can activate the rule by changing its status in the rules table.



Finalize Page

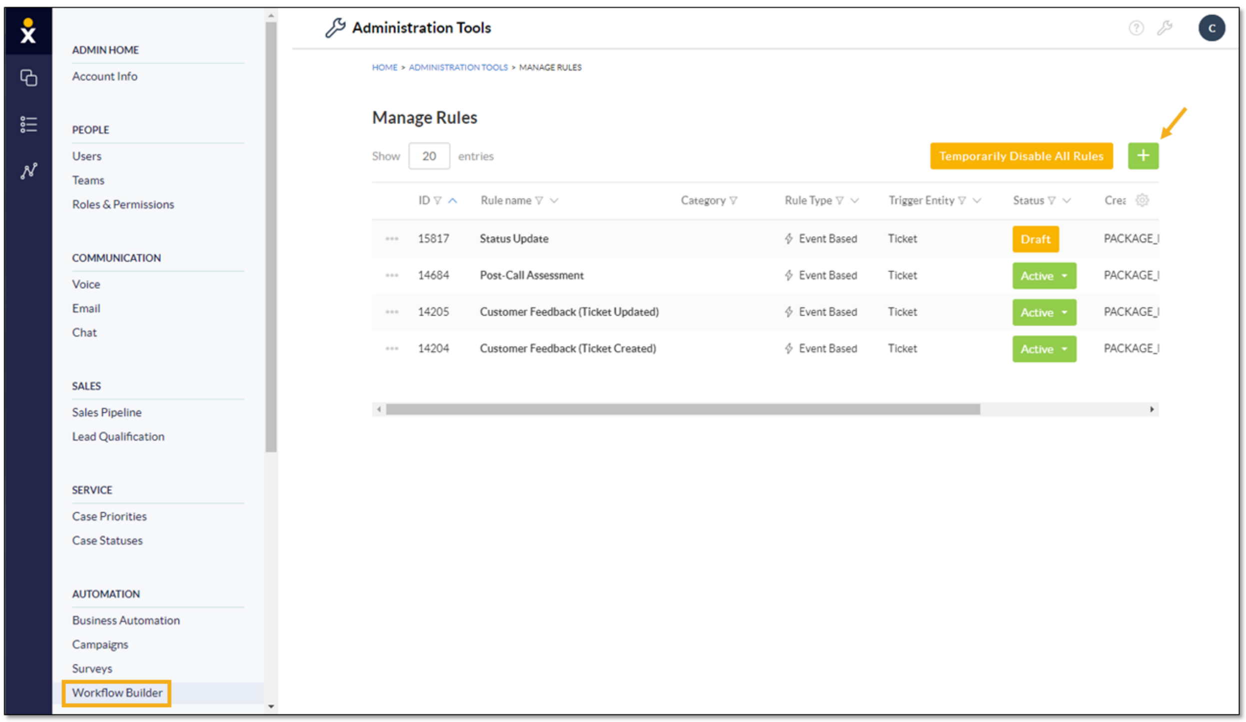


Rules Table

Building Automation Rules From Scratch

Nextiva offers Administrators the flexibility to build automation rules from scratch, if they prefer not to use a template. Customize automation rules to best fit the business needs, such as automatically sending a welcome email each time a new Contact is added to Nextiva CRM.

1. Visit nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
4. Under **Automation** in the left navigation panel, select **Workflow Builder** and click the green **Plus (+)** icon at the top-right corner of the page.

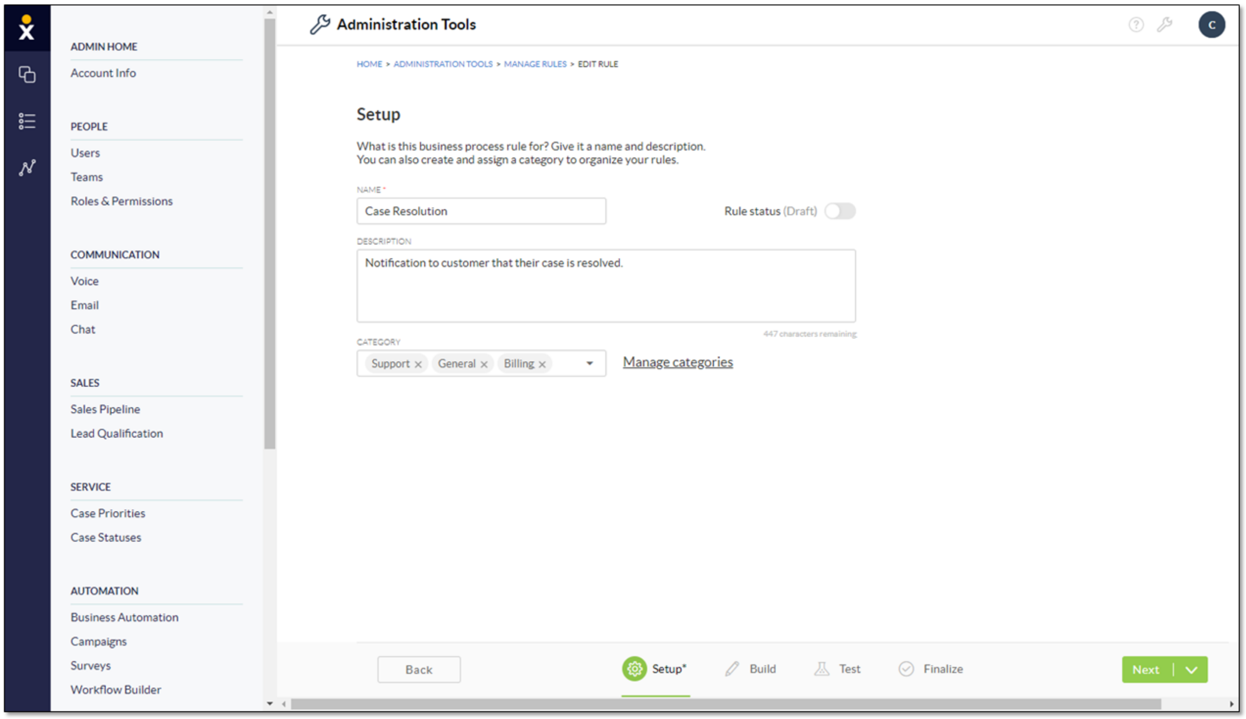


Workflow Builder

5. Complete the **Setup** page and click **Next**.
   - Enter a unique **Name** for the rule (at least eight characters) and a **Description** of the rule (optional).
   - Toggle the **Rule status (Draft)** switch to **ON** (green) to indicate the rule is not completely configured.
   - Select a **Category** to help organize the rules.

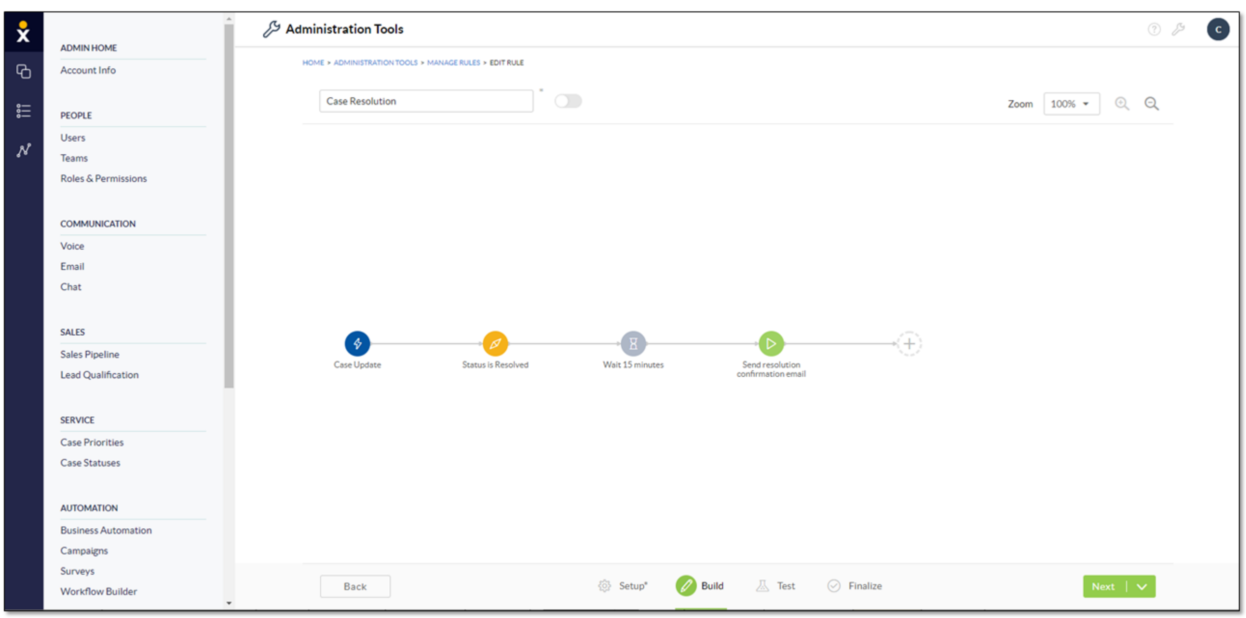
     TIP: Administrators can select multiple Categories, as well as click the **X** to deselect any. To add a new Category, click **Manage categories**, then click **Add category** and enter a name in the **Category Name** field.

Finally, click **Save**. The **Category** drop-down list will reflect the changes immediately.



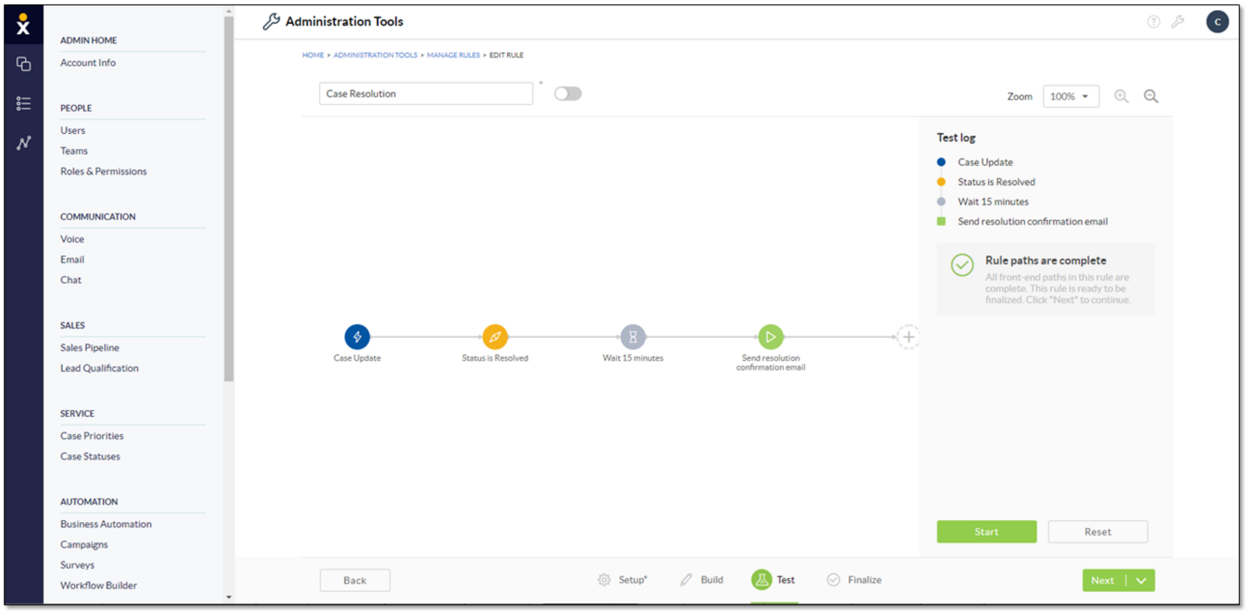
Setup Page

6. Build the rule on the **Build** page by adding components, then click **Next**. For more information, click here.



Build Page

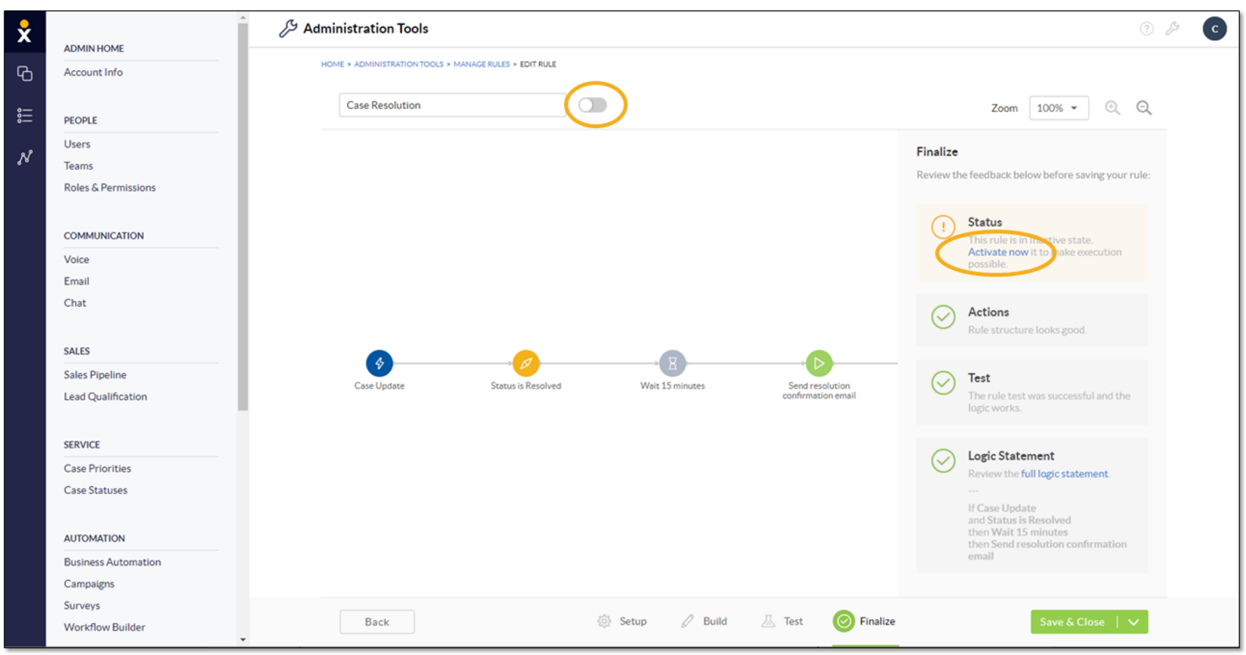
7. On the **Test** page, click the **Start** button to verify the rule, then click **Next**.



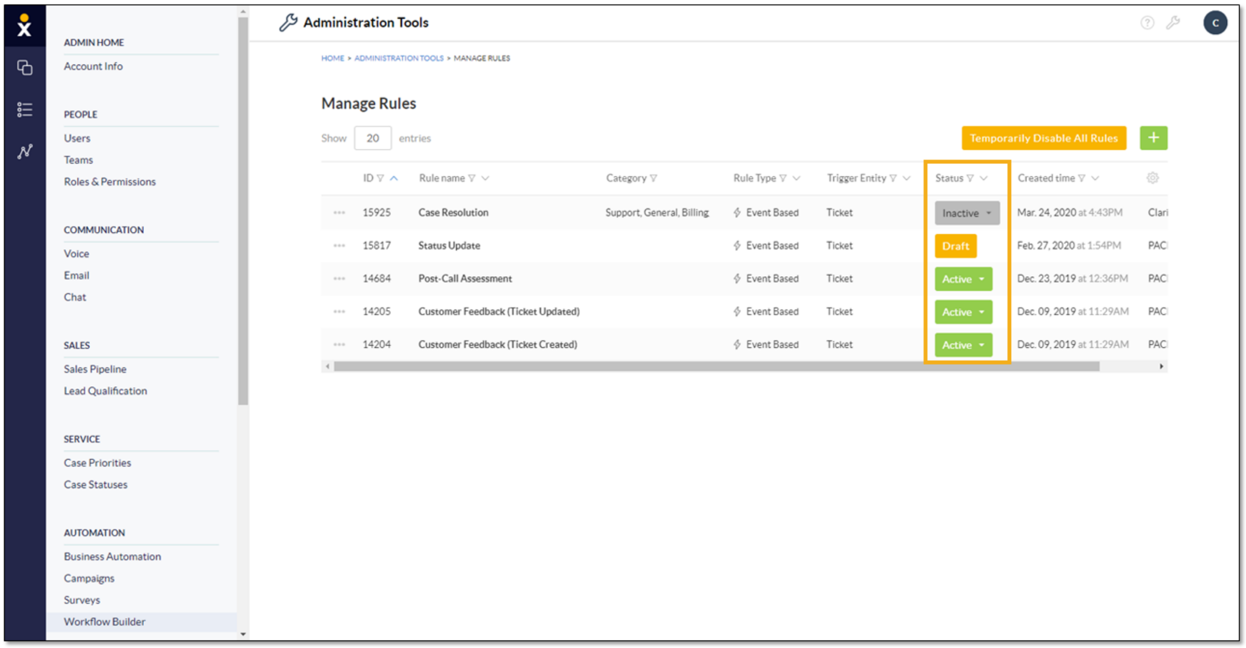
Test Page

8. On the **Finalize** page, review the feedback and click **Save & Close**.

NOTE: Click **Activate now** or toggle the switch next to the rule name to enable the execution of the rule if desired. Otherwise, Administrators can activate the rule by changing its status in the rules table.



Finalize Page



Rules Table

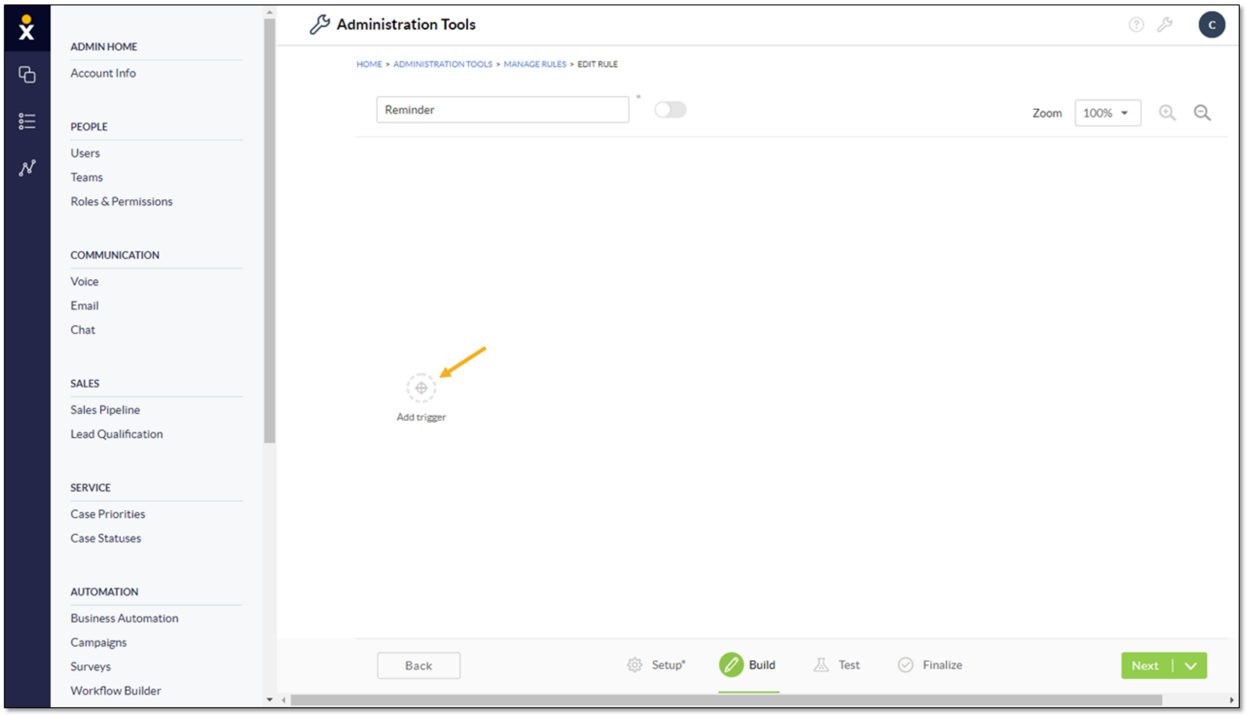
Automation Rule Components

Every automation rule requires a Trigger and at least one Action. Administrators may also include Conditions and Wait Blocks as additional criteria for automatically completing tasks. For example, when a rule is triggered based on the specified conditions, a specific action can be completed, such as instantly sending a text once a Case has been resolved or wait 24 hours after the case to be resolved.

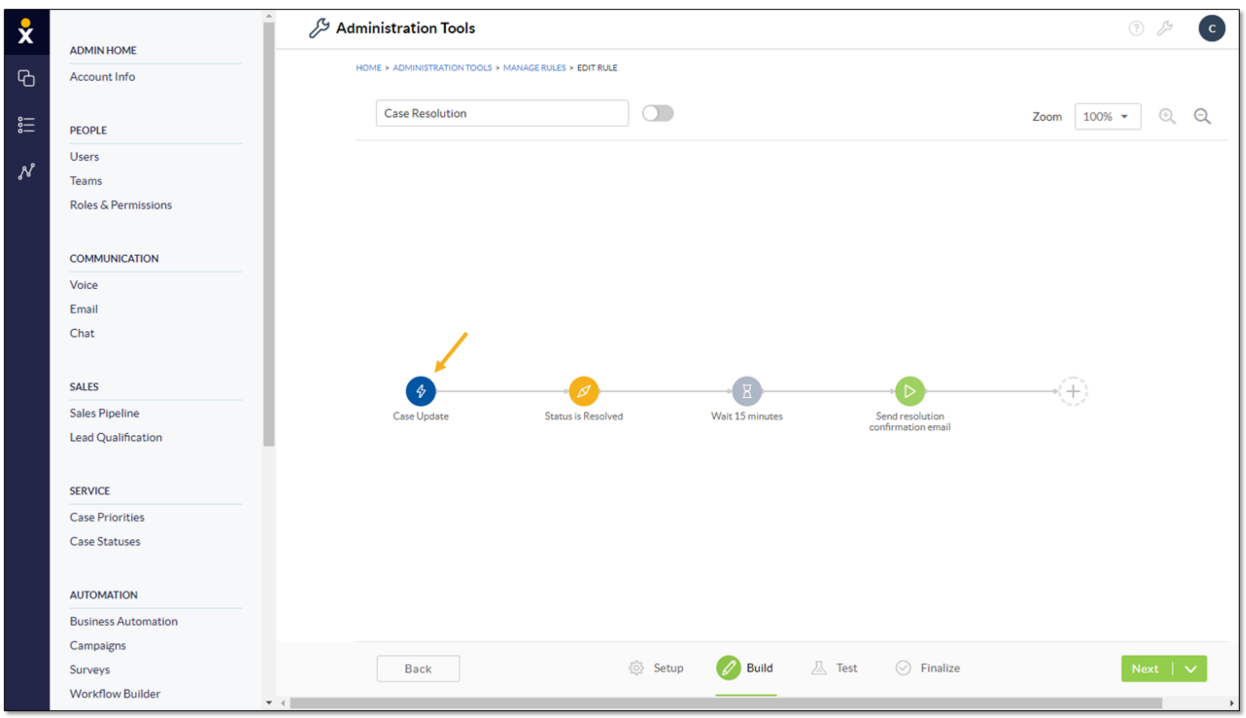
Creating a Trigger

Create Triggers (events or specific dates/times) to initiate an automation rule. For example, a Trigger could be the event of an Account being created to initiate a rule that automatically sends a welcome email, or a Trigger could be the anniversary date of a customer to initiate a rule that texts the customer an anniversary discount code.

1. Under **Workflow Builder**, on the **Build** page, click **Add trigger**.
   NOTE: If building a rule from a template, click the blue circle that represents the Trigger to edit it.

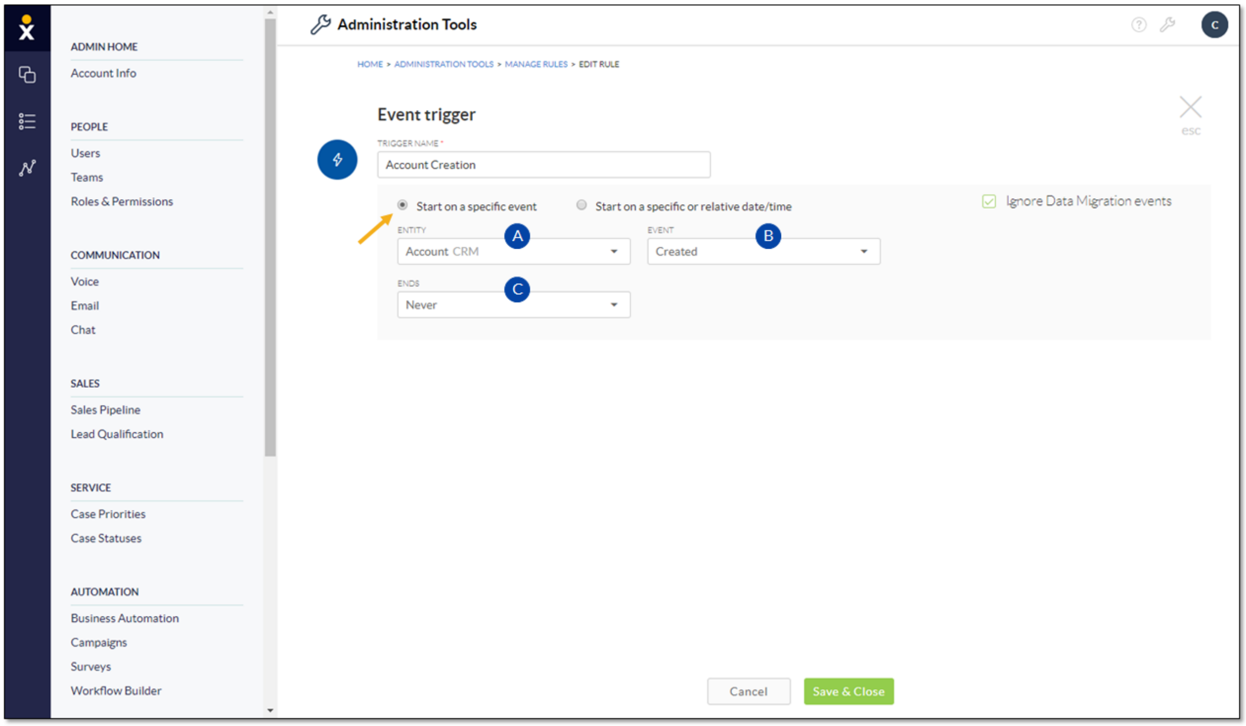


Add Trigger



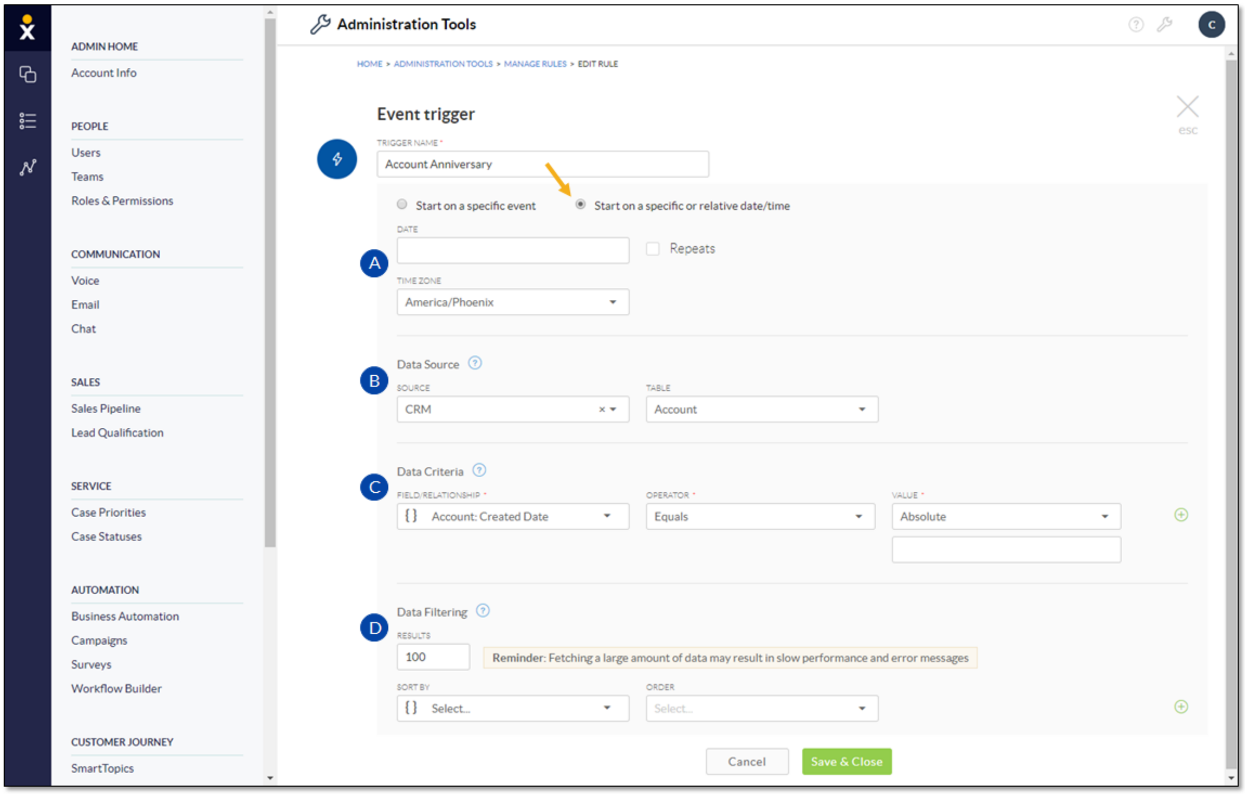
Edit Trigger

2. Complete the **Event trigger** form, then click **Save & Close**.
    - Enter a name for the Trigger.
    - Select the **Ignore Data Migration events** checkbox to prevent data migration events from starting the automation rule.
    - Select either **Start on a specific event** or **Start on a specific or relative date/time** to indicate when to initiate the rule.



Start on a Specific Event

A. Select the CRM component or Activity (Interaction) on which the event is based.
B. Select the **Event** type (Created, Deleted, Updated, Merged). Options will vary based on the selection.
C. Specify when the Trigger **Ends**.



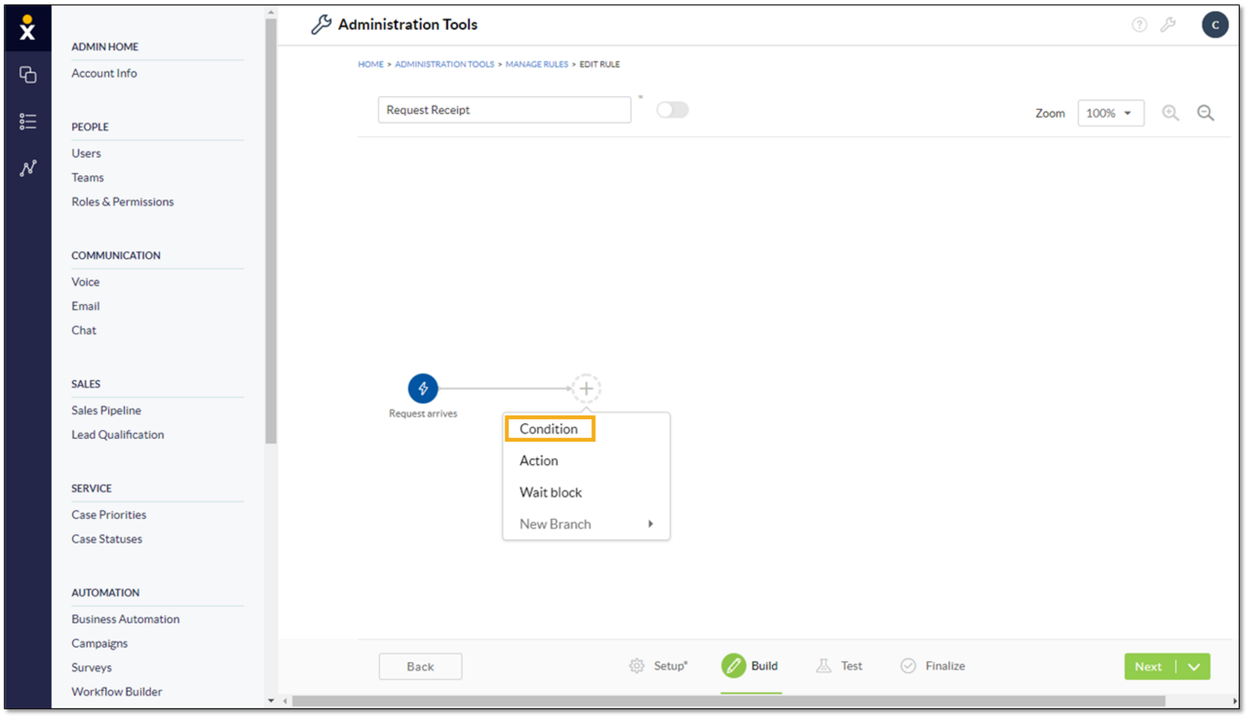
Start on a Specific or Relative Date/Time

A. Enter the **Date** (and time) that initiates the automation rule. Administrators can also set the Trigger to repeat, configure how often to repeat it, and when to stop the rule from running.
B. Select the **Data Source** to tell the system what CRM component to look at.
C. Indicate the **Data Criteria** to specify what exactly needs to happen to start the rule.
D. Specify how to implement **Data Filtering** to limit and prioritize the Trigger instances to maintain system performance.

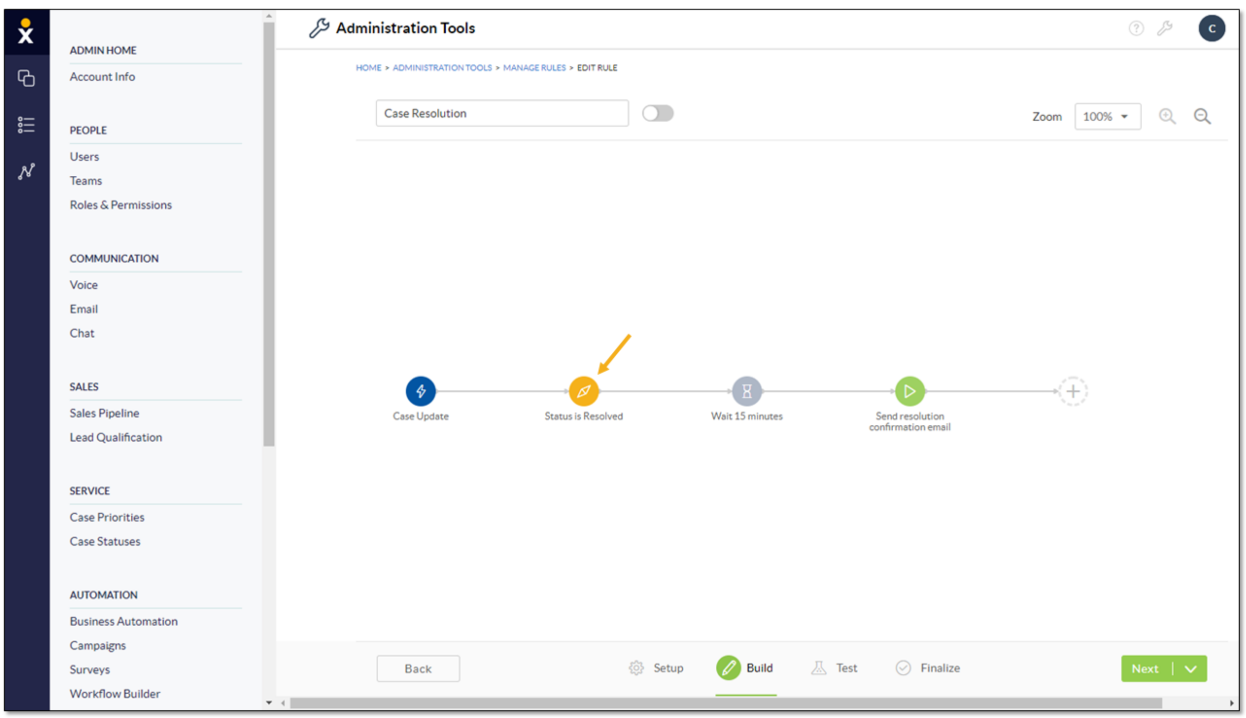
Adding Conditions

Add Conditions to include requirements that need to be met before the Action will execute.

1. On the **Build** page, click the **Plus (+)** icon and select **Condition**.
   NOTE: If building a rule from a template, click the orange circle that represents the Condition to edit it.

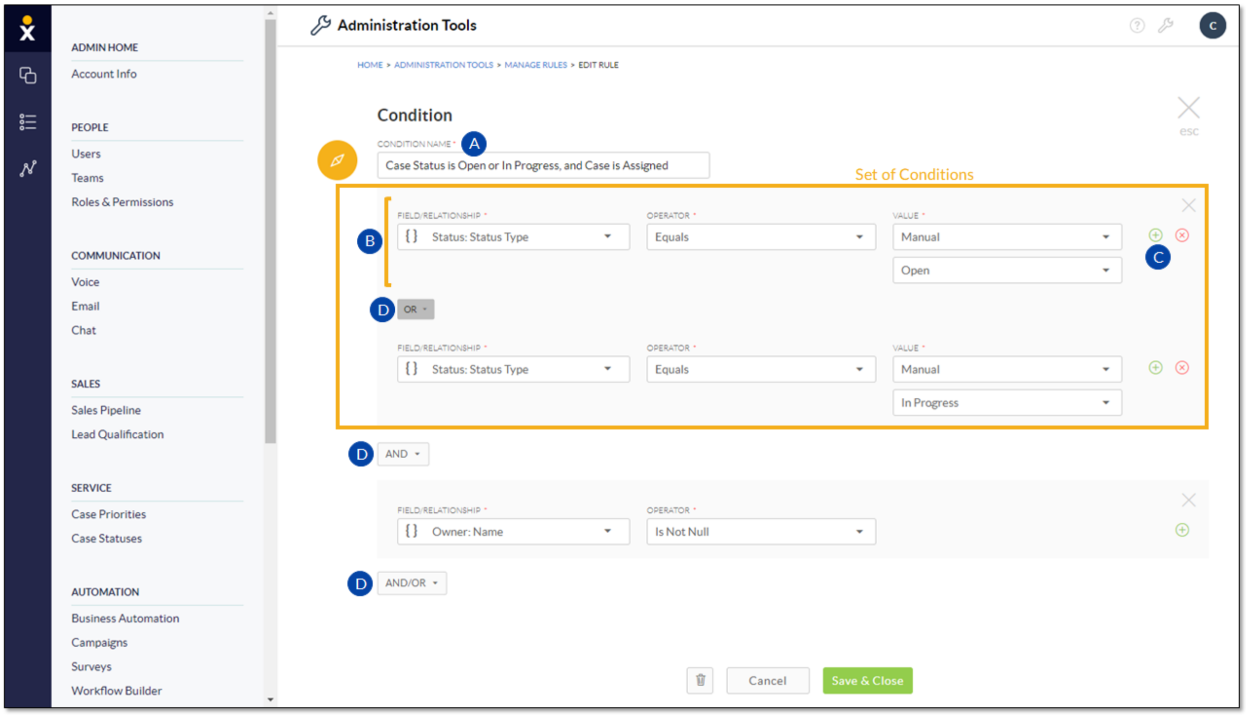


Add Condition



Edit Condition

2. Complete the **Condition** form and click **Save & Close**.



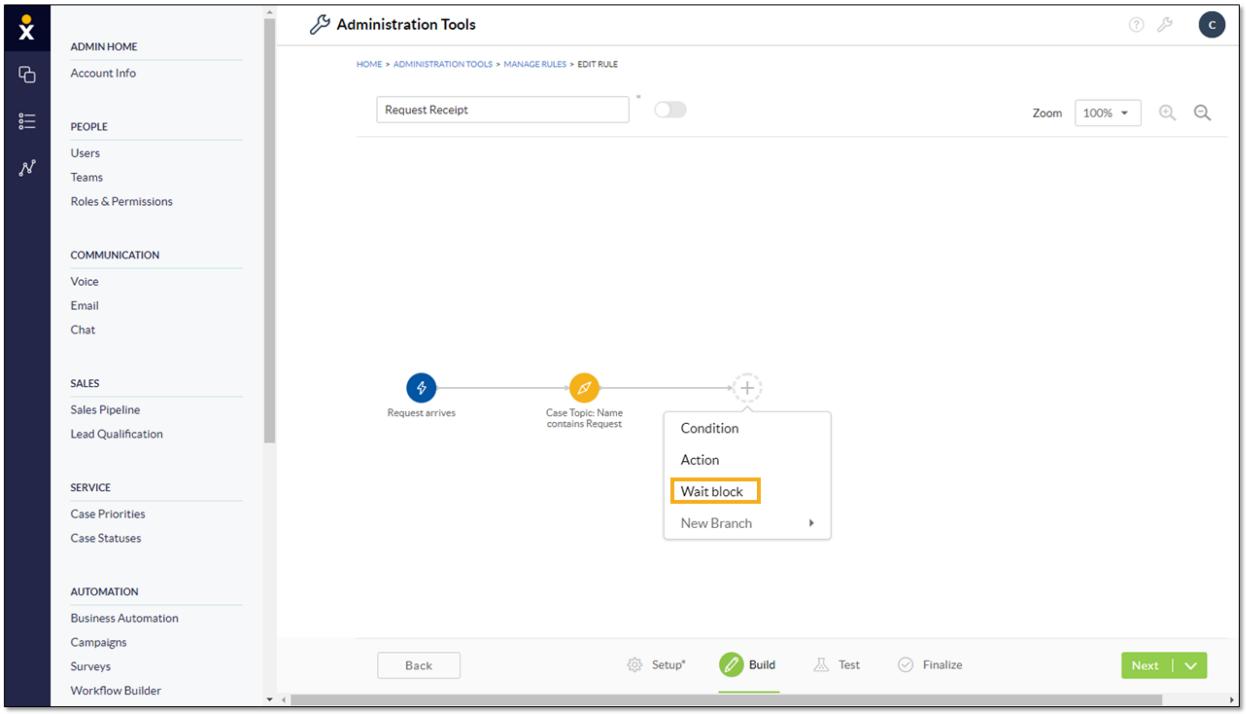
Condition Form

A. Enter a name for the Condition.
B. Make selections for **Field/Relationship** and **Operator** (and **Value**, if applicable) to define the criteria that must occur before performing the Action.
C. Click the green **plus (+)** icon to the right of the Condition to create a set of Conditions.
D. Click **AND/OR** to build on the criteria. Selecting **AND** between Conditions (or set of Conditions) requires all those Conditions to be met. Select **OR** to indicate that one or the other Condition (or set of Conditions) must be met.

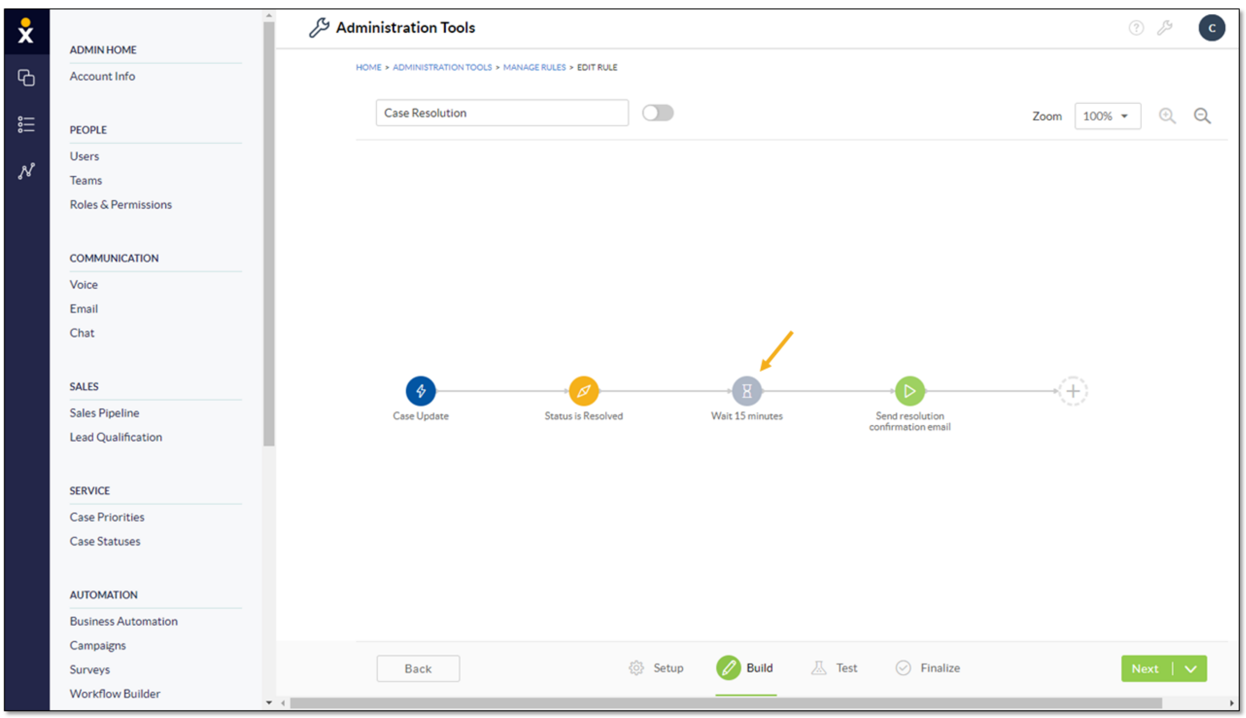
Adding Wait Blocks

Add Wait Blocks to specify an amount of time that must transpire or a specific date/time that must be true before initiating the Action that completes the task.

1. On the **Build** page, click the **Plus (+)** icon and select **Wait Block**.
   NOTE: If building a rule from a template, click the gray circle that represents the Wait Block to edit it.

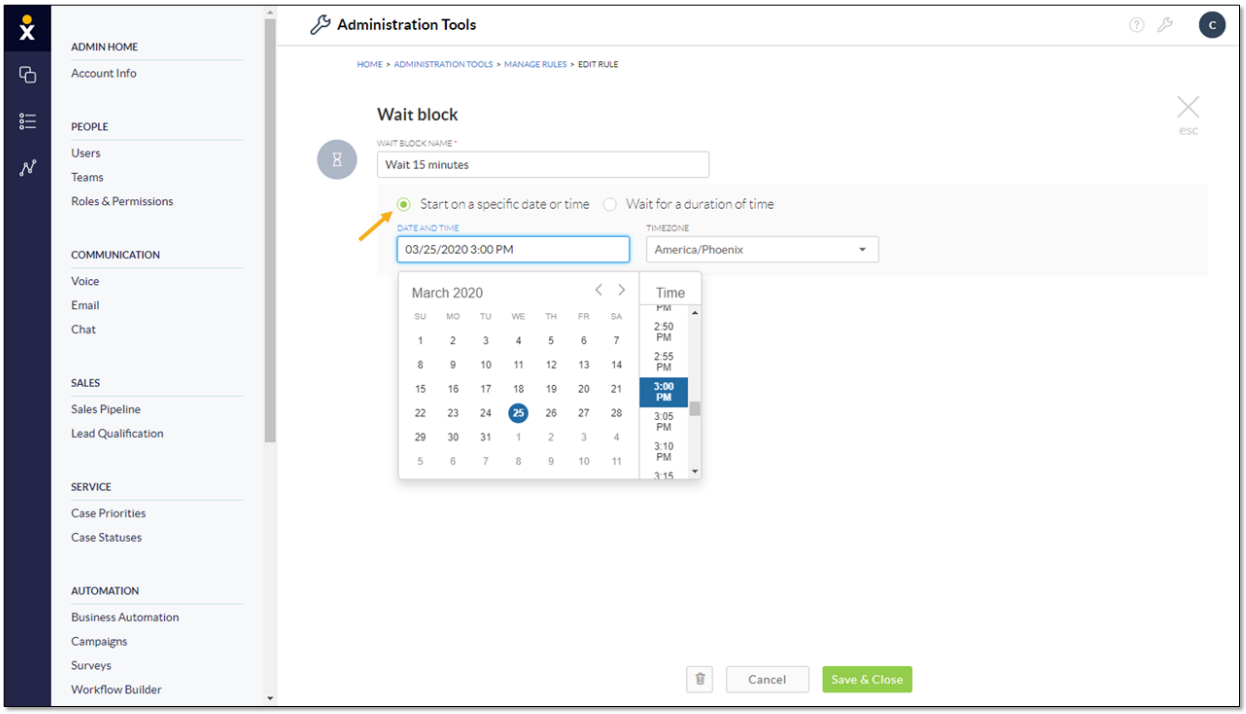


Add Wait Block

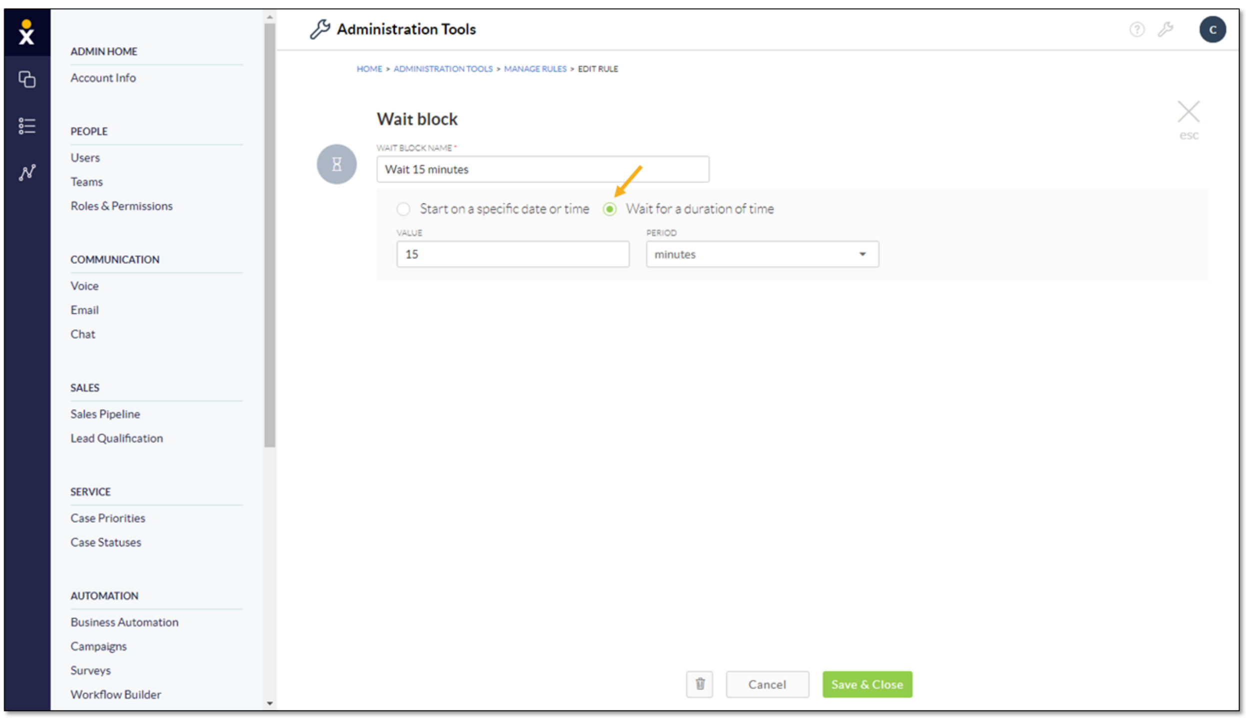


Edit Wait Block

2. Complete the **Wait block** form and click **Save & Close**.
    - Enter a name for the Wait Block.
    - Select **Start on a specific date or time** or **Wait for a duration of time** to indicate when to execute the Action and complete the respective fields.



Start on a Specific Date or Time

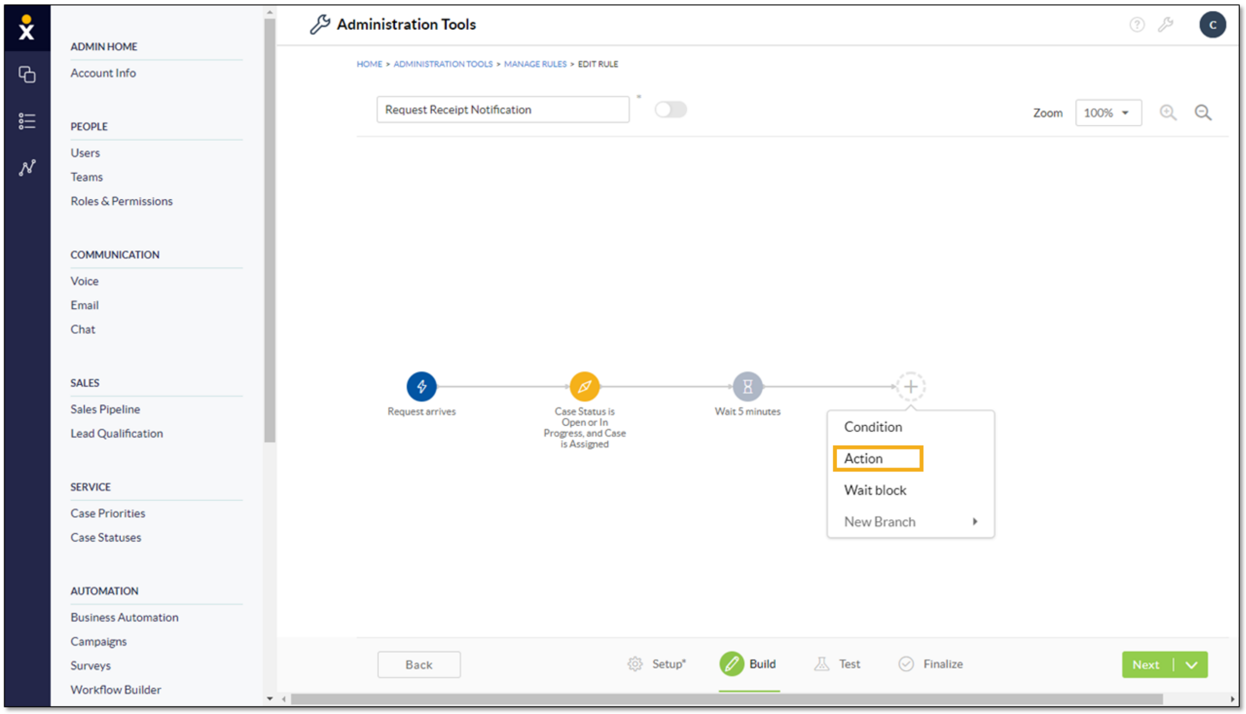


Wait for a Duration of Time

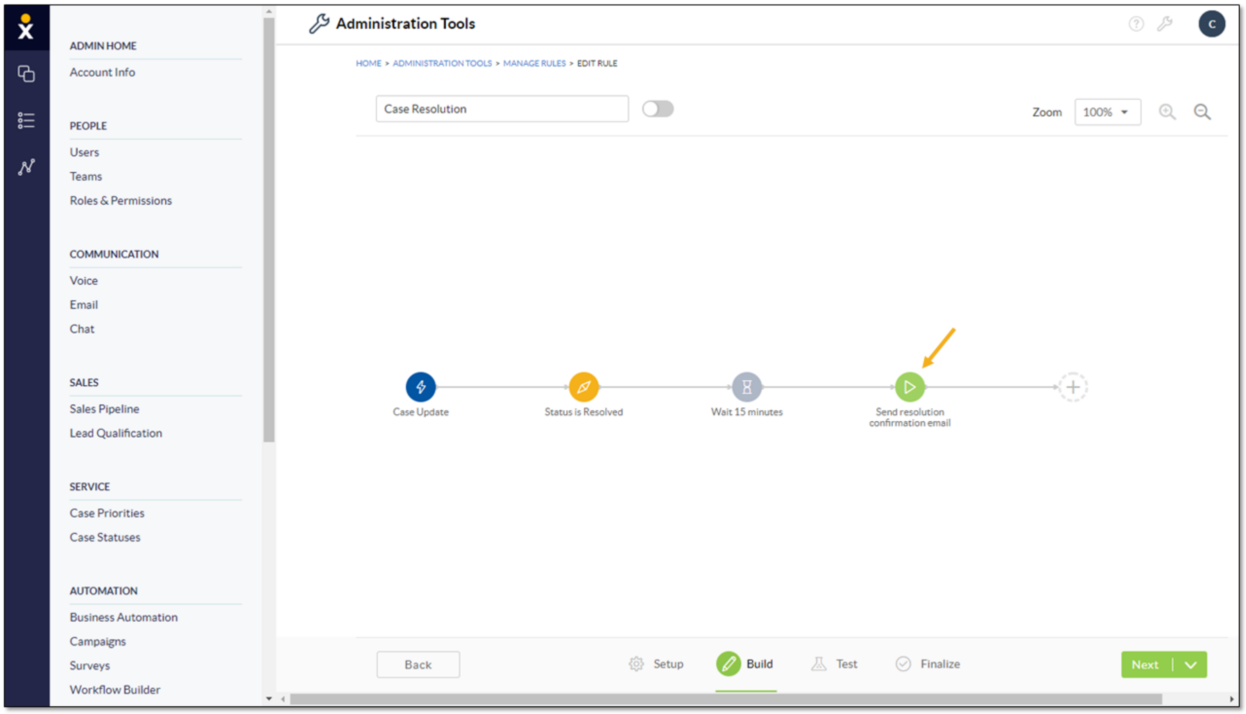
Adding Actions

Specify one or more Actions (specific results) to complete the automated task.

1. On the **Build** page, click the **Plus (+)** icon and select **Action**.
   NOTE: If building a rule from a template, click the green circle that represents the Action to edit it.

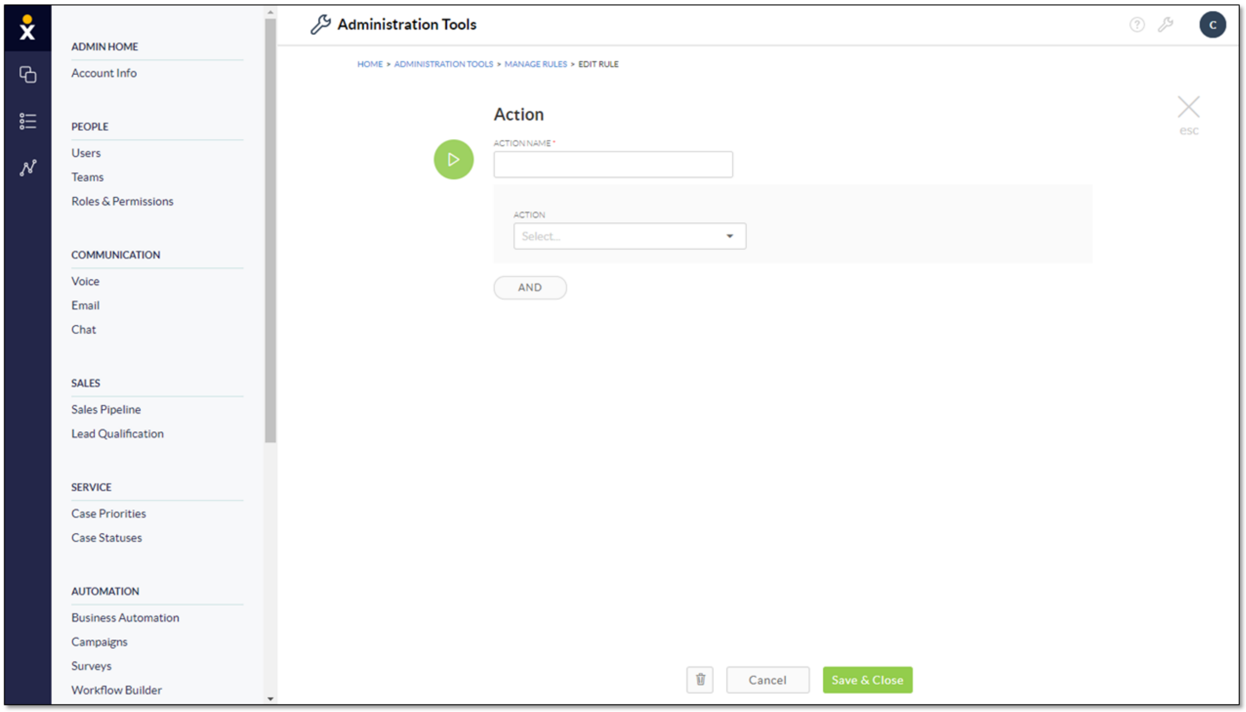


Add Action



Edit Action

2. Complete the **Action** form and click **Save & Close**.
    - Enter a name for the Action.
    - Select a type of Action from the **Action** drop-down list. For more information, click here.
    - Click **AND** to include additional Actions.



Action Form

Action Types

The type of Action defines the task the business wants to automate. For example, a company may want to automate the task of sending a survey to a customer after a Case is resolved to collect feedback on their satisfaction with the service. A retail business may want to send an email notification to a customer who bought a 30-day supply, ten days before the 30 days is up. Companies may also want to automate internal tasks such as changing the priority of a Case that has been left open for a specific number of days.

Select a type of Action for the automation rule to execute as the final step to complete a task.

Types of Actions include:

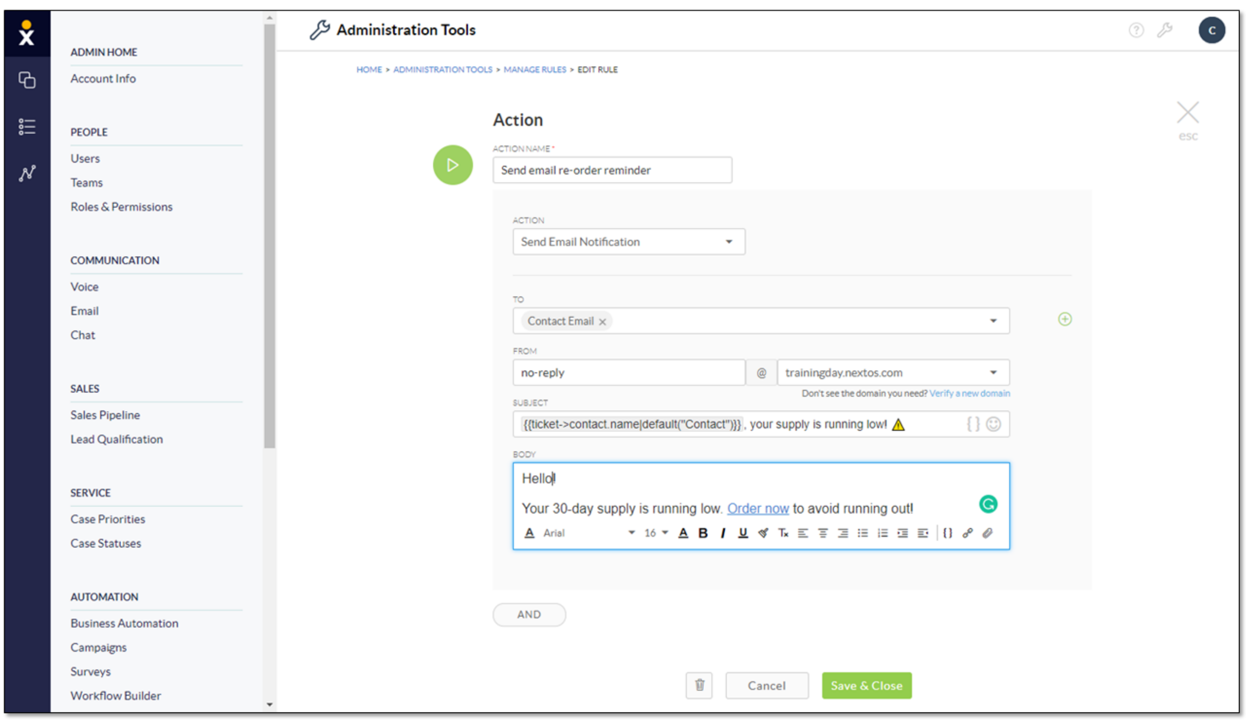
- Send Email Notification: Send a pre-composed email message.
- Send SMS Notification: Send a pre-composed text message.
- Update Entity: Modify CRM data such as the Case status or Contact name.
- Create Entity: Create a CRM record or component.
- Send Survey: Send a pre-designed survey as a link in an email or as an email with the survey embedded.
- Create Activity: Create a new interaction (call, email, or note) in the CRM.

Send Email Notification

Automate outgoing emails so employees won't need to keep track of when and to whom they need to be sent. For example, a company wants to send email reminders to customers whose 30-day supply is running low. Instead of relying on employees to regularly check all past orders and manually email the customers, companies can automate this task.

After selecting **Send Email Notification** from the **Action** drop-down list on the **Build** page, draft the email message:

- **To:** Select the desired recipient.
- **From:** Enter the sender email address (default: no-reply). For companies with multiple email domains, select the desired domain.
- **Subject:** Include a subject for the email message. Insert emojis to make the email stand out. Use the **double brace {}** icon to insert data from a specified field in the CRM. This is useful for including information that varies with each email. For example, add the Contact name to personalize the email and increase the likelihood that the recipient will read the message, or include an order number in the subject line.
- **Body:** Compose the email message. Use the toolbar to format the text, insert CRM data, as well as include links and file attachments.



Send Email Notification

Send SMS Notification

Send automatic text messages to customers who prefer to receive notifications directly on their phone. For example, companies can send text reminders to customers whose contract is about to expire. Businesses can also send birthday greetings via text. Personal touches such as these enhance the customer experience.

Select Send SMS Notification from the Action drop-down list on the Build page, then draft the text message:

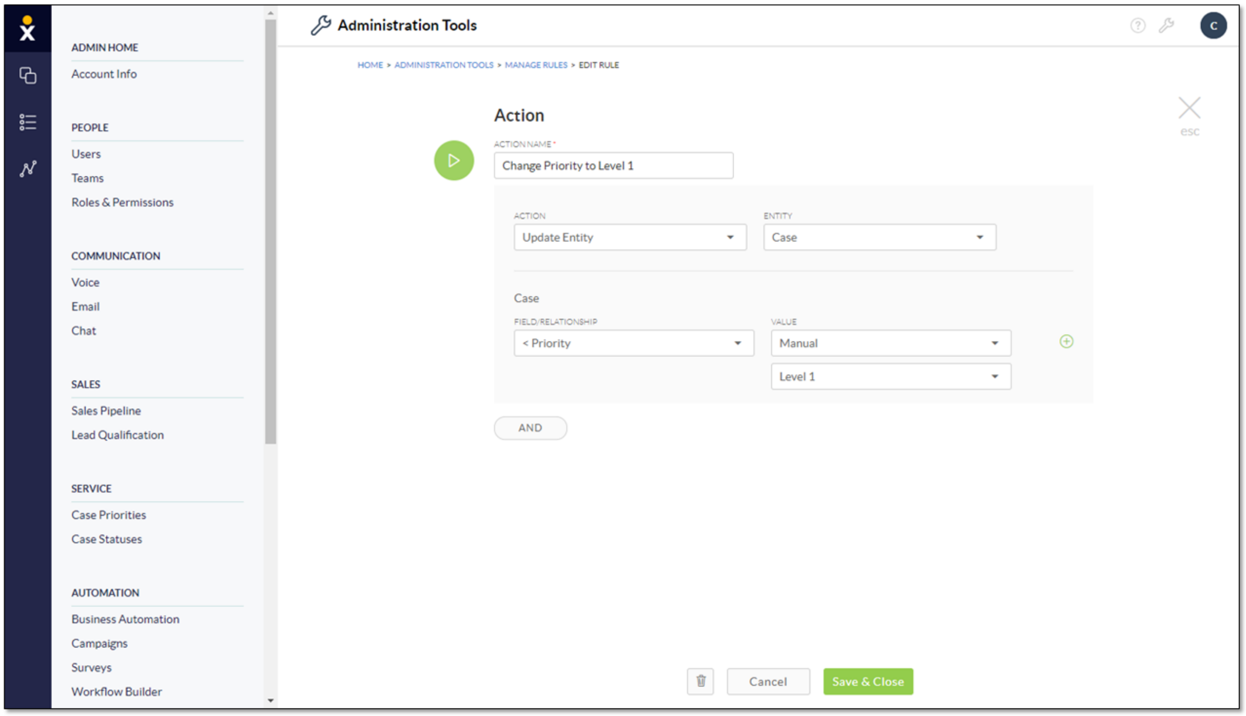
- From: Select the SMS number of the sender. This number can be one assigned to either a User or a Team.
- Message: Compose the text message. Use the toolbar to format the text, as well as include links and file attachments. Use the double brace {} icon to insert data from a specified field in the CRM. This is useful for including information that varies with each text message. For example, add the Contact name to personalize the text.
- To: Select the recipient.
- Send a test to: Enter a valid 10-digit number for testing the text message. This ensures that the message displays as intended.

Update Entity

Update the CRM automatically when specific criteria are met so employees won't need to make the changes manually. For example, to make sure Cases are timely addressed, companies can implement an automation rule that increases the priority level of Cases that remain open for a specified amount of time.

After selecting Update Entity from the Action drop-down list on the Build page, specify what to change in the CRM:

- Entity: Select the part of the CRM this Action affects. Options include Account, Case, and many others.
- Field/Relationship: Indicate the specific field to update, such as the Case priority level.
- Value: Specify how to update the information. For example, update the Case priority to Level 1. The Value can be defined manually (select Manual and choose a value from the drop-down list below it) or by referencing data in another part of the CRM (select Pick from Trigger and navigate to the CRM field from the {} Select drop-down menu).



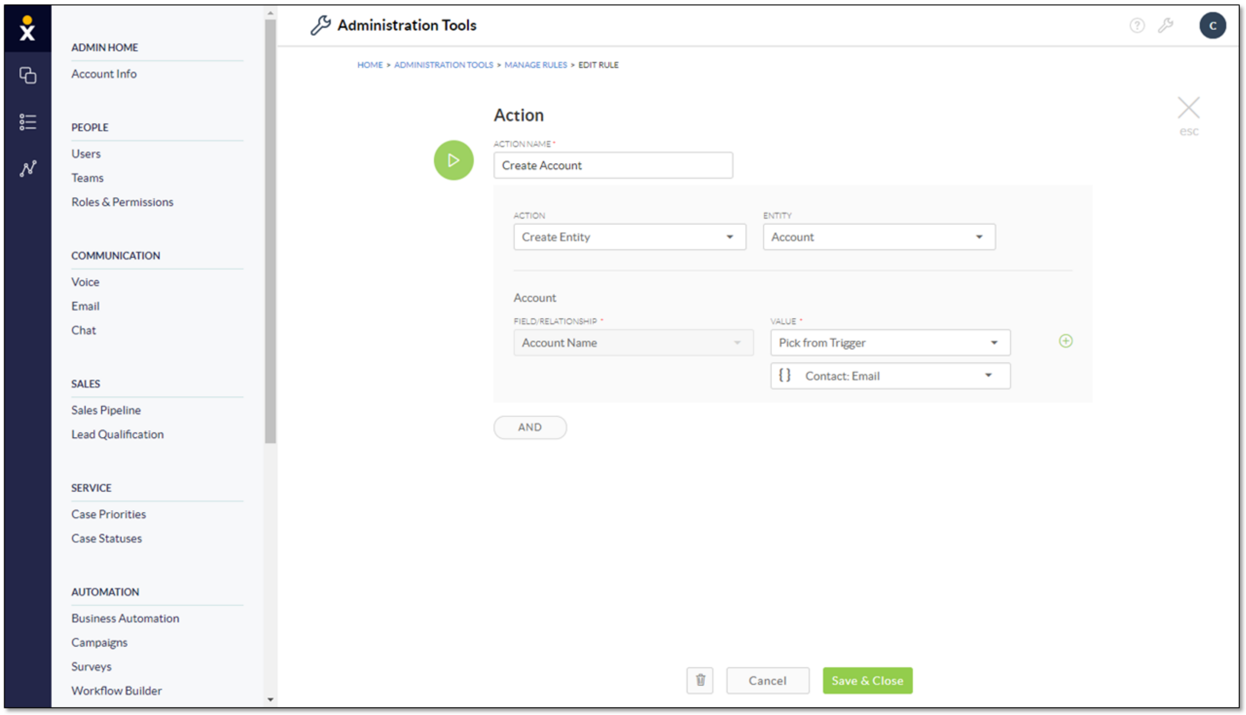
Update Entity

Create Entity

Automatically create CRM objects when specific criteria are met so employees won't need to do it manually. For example, businesses can automate the task of creating a new Case to notify an Agent or Team, every time a unique Opportunity is added to Nextiva CRM.

Select **Create Entity** from the **Action** drop-down list on the **Build** page, then define the CRM object to create:

- **Entity:** Select the CRM object. Options include Account, Quick Macro, and many more.
- **Field/Relationship:** Indicate the specific field to create, if it's not auto-populated, such as the label for Contact Type.
- **Value:** Specify the value of the field. For example, create an Account (CRM object) and use the Contact email (Value) as the Account Name (field). The Value can be defined manually (select **Manual** and choose a value from the drop-down list below it) or by referencing data in another part of the CRM (select **Pick from Trigger** and navigate to the CRM field from the **{} Select** drop-down menu).



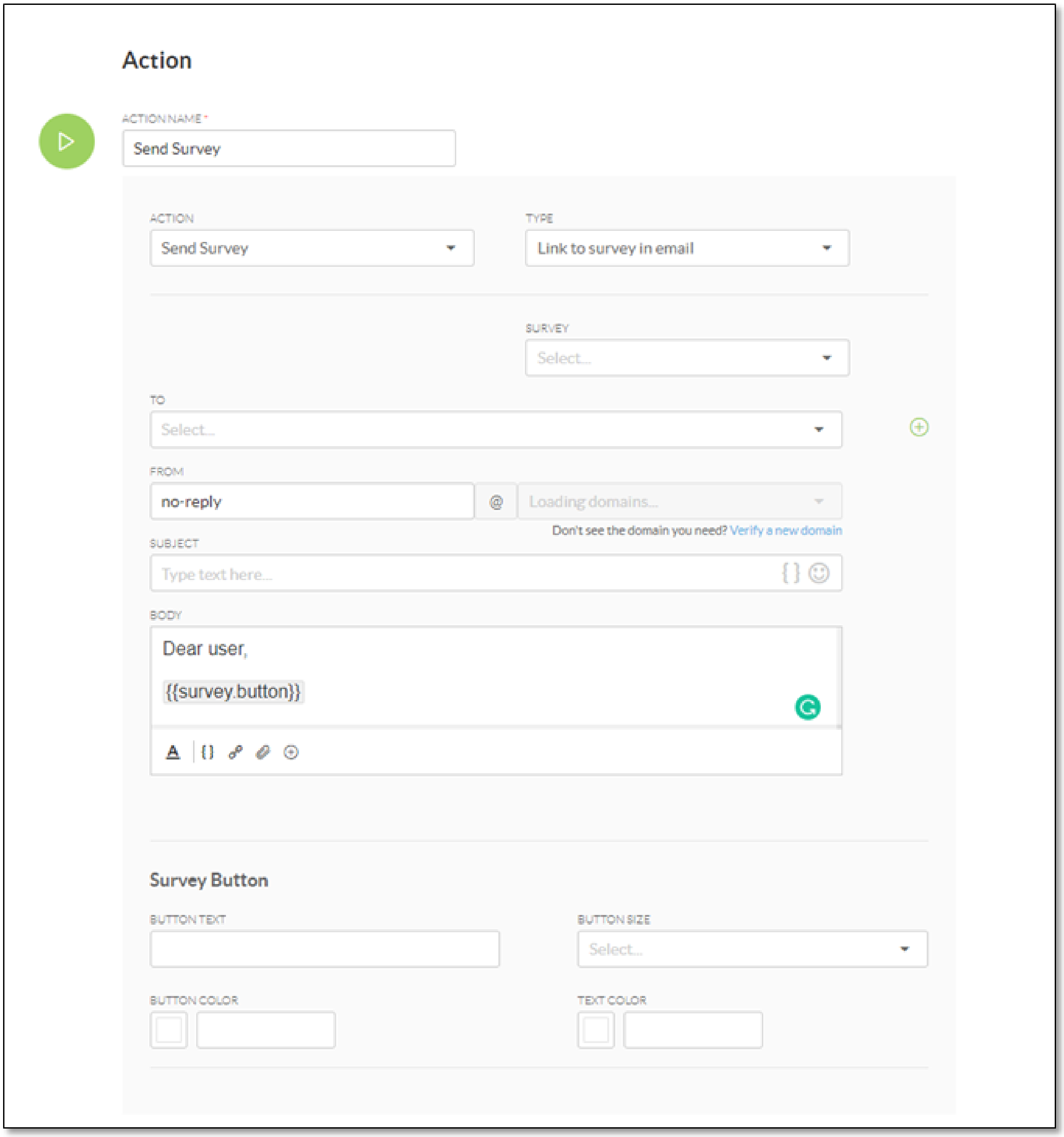
Create Entity

Send Survey

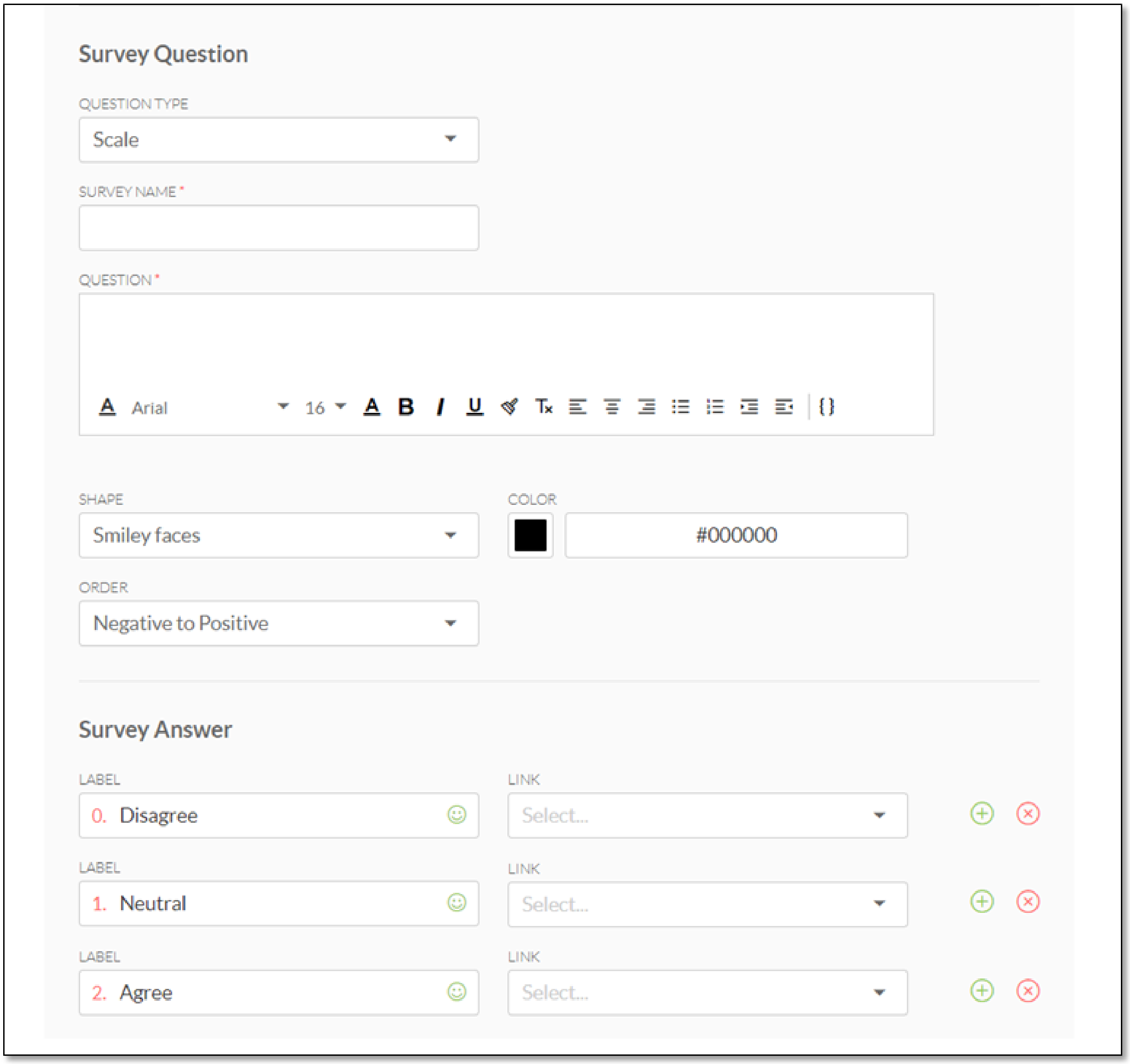
Understand the customer journey by collecting customer feedback. Nextiva CRM can automatically send Surveys after a particular action has been performed or after a specified time frame. For example, when a Case is marked as resolved, Nextiva CRM can instantly send a Survey to the customer via email or after a specified time frame.

1. From the **Action** drop-down list, select **Send Survey**.
2. From the **Type** drop-down list, select one of the following options:
   a. **Link to survey in email** to send an email containing a link to a preconfigured Survey.
      i. Select a Survey from the **Survey** drop-down list.
      ii. Customize the **Survey Button** that will appear in the body of the email message.
   b. **Survey questions in email** to send an email containing the survey question in the body of the email.
      i. Design the survey question and answers by completing the **Survey Question** and **Survey Answer** forms.
3. From the **To** drop-down list, select the field(s) containing the email address.
4. In the **From** field:
   a. Enter the username, such as info, before the @ symbol. Otherwise, the username will display as *no-reply*.

   b. Select a verified domain from the drop-down list or click **Verify a new domain** to set up a custom email domain.
5. Enter a subject for the email in the **Subject** text box.
   NOTE: Use the {} icon to add contextual information to the email subject or body of the email by selecting CRM components and field values that are related.
6. In the **Body** edit box, compose the email message. Format the text, add links, and attach files.



Link to Survey in Email



Survey Question in Email