



Automation Center Guide

A Communication Center Feature

Table of Contents

Access and Navigation	2
Automation Center – Configuration	2
Create a New Workflow from Template.....	2
Add Actions to Workflow Rules	4
Name the Workflow	5
Agency Workspace – Workflow Icon	6

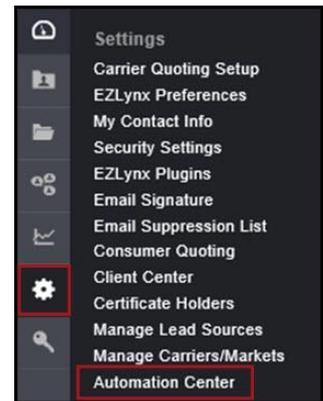
With Automation Center users can now automate rules for the agency and branch offices. When triggered, these rules will automatically generate actions like creating notes, adding tasks, sending emails to applicants and closing Sales Center opportunities.

Access and Navigation

From sending emails to creating tasks, this feature further streamlines agency processes and helps admins to better manage the agency.

To Access Automation Center:

- Hover over the **Settings** icon, and click **Automation Center**.
- The **Workflows** tab allows users to:
 - Identify In Progress workflows.
 - View past workflows for all applicants.
 - Filter by Agency and more.
- The **Configuration** tab allows admins to:
 - Create a new workflow using a pre-built template.
 - View the workflows already added.
 - Filter by a variety of options.



Automation Center – Configuration

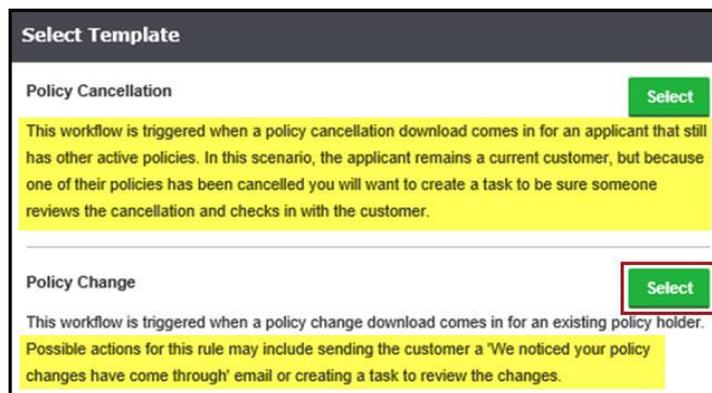
Admins should begin here to decide which triggered events to develop automated workflows for.

Create a New Workflow from Template

Users create workflows using one of several pre-built templates. Each of the available templates provides a brief description of what system event triggers that rule, and the possible actions/outcomes that users could create in response.

To add a workflow:

- From the **Configuration** tab, click the green **New Workflow from Template** on the right.
- Review the available templates, and click the green **Select** button when ready.





Automation Center Guide

A Communication Center Feature

Notice that each template gives a description of the trigger that activates the workflow. We recommend using the Possible Actions as a guide for how to set up the workflow. We have offered ideas for which actions to use, but these are simply a starting point for the user to decide which actions best meet the agency's needs. There are currently 11 templates to choose from, depending on the agency's enabled products.

These include:

- **Additional Policy**
 - To Trigger: Receive a downloaded New Business transaction for a customer with existing active policies.
 - Possible Actions: Create a task for CSR to send a Renewal Agency Form Template via EZLynx Postal Mail, or send a Thank You for Bundling with Us email campaign to the applicant.
 - **Customer Lost**
 - To Trigger: Receive a downloaded Cancellation transaction for an applicant with no other active policies.
 - Possible Actions: Create a task for the assigned user to identify the cause, or send a Win Back email campaign to customer with additional steps to follow up over the next year.
 - **eSignature Completed**
 - To Trigger: The applicant and other signers have completed the eSignature envelope.
 - Possible Actions: Create a task for assigned user to verify the documents and share to Client Center, or send a Thank you email campaign to customer.
 - **Manual Workflow**
 - To Trigger: This needs to be manually activated by a user.
 - Possible Actions: Create a task for assigned user to call customer, or send email campaign to applicant regarding issue.
 - **New Customer**
 - To Trigger: Receive a downloaded New Business transaction for an applicant with no other active policies.
 - Possible Actions: Create a task for the applicant's assigned user to send a Welcome Letter Agency Form Template through EZLynx Postal Mail, or send a Welcome to the Agency email campaign to customer.
 - **Policy Cancellation**
 - To Trigger: Receive a downloaded Cancellation transaction for a customer with other active policies.
 - Possible Actions: Create a task for assigned user to text the customer using EZLynx Text Messaging.
-

- **Policy Change**
 - To Trigger: Receive a downloaded Policy Change transaction for an existing policy.
 - Possible Actions: Create a task for the assigned user to utilize Policy Compare to confirm premium increases or decreases, or send an email campaign to the applicant confirming the changes made.
- **Sales Center – Decision Status**
 - To Trigger: Move opportunity to the Decision column.
 - Possible Actions: Create a task for assigned producer to send a text through EZLynx Text Messaging, or send an email campaign to opportunity outlining benefits of choosing your agency.
- **Sales Center – Fulfillment Status**
 - To Trigger: Move opportunity to the Fulfillment column.
 - Possible Actions: Create a task for assigned producer or CSR to send a We appreciate your business Agency Form Template through EZLynx Postal Mail, or send email campaign to opportunity with a link to Client Center.
- **Sales Center – Interview Status**
 - To Trigger: Move opportunity to the Interview column.
 - Possible Actions: Create a task for assigned producer to call opportunity and gather risk info for quote submissions, or send email campaign to opportunity with a link to agency's Consumer Quoting portal to compare Auto and Home quotes.
- **Sales Center – Presentation Status**
 - To Trigger: Move opportunity to the Presentation column.
 - Possible Actions: Create a task for assigned producer to use EZLynx Quote Proposals, or send email campaign to opportunity that you have several competitive quotes to go over together.
- **Sales Center – Pricing Status**
 - To Trigger: Move opportunity to the Pricing column.
 - Possible Actions: Create a task for assigned producer to promptly review all quotes as they arrive, or send email campaign to opportunity with follow-up emails/steps to continue building the customer relationship.

Add Actions to Workflow Rules

After selecting the workflow template, it's now time to add actions like add tasks or starting an email campaign. The wizard at the top of the page helps guide you through this process.

Two actions are available:

- Add Note & Task
- Send Email

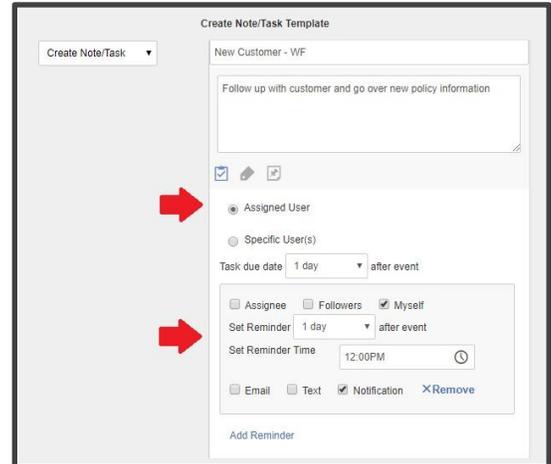
The screenshot shows a wizard titled "Add New Workflow from Template". It consists of two steps: "1 Add Actions" and "2 Name This Workflow". A red arrow points to the "Add Actions" button. Below the steps, there is a "Select Action" dropdown menu with options: "Applicant", "Create Note/Task", and "Send Email". A red arrow points to the "Name This Workflow" button at the bottom right.

Notice that we have already added the first action selector to speed up the process. If you need additional actions, click **Add Actions**. You can add as many actions as you need.

Add Note & Task

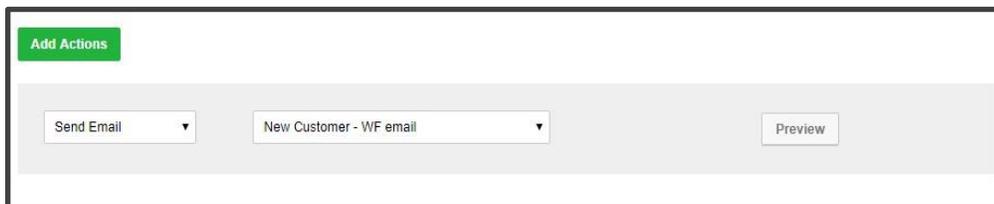
This action automatically creates a note when an event is triggered, or both a note and a task. Please note that the task set up is slightly different here versus the Agency Workspace.

- Set the **Due Date** for the task **X** number of days after the event triggers the task action.
- **Reminders** are also set **X** number of days after the event is triggered.
- **Please Note:** If multiple branches are selected for this action, then the note and task can only be assigned to the triggered applicant's Assigned User. If only one branch is chosen, then users can select from either the applicant's Assigned User or a Specific User in the agency.



Send Email

Another available action is to start an email campaign to the triggered applicant. Simply choose a template to use. This dropdown lists all Email Campaign templates the user has access to view.



Name the Workflow

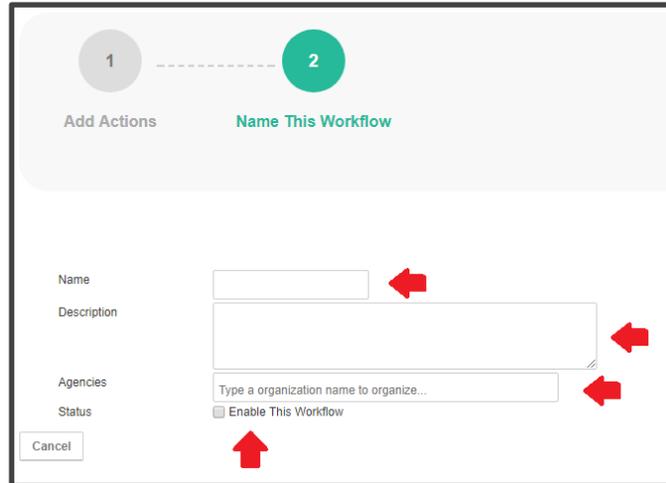
After adding all desired actions, users should name the workflow, assign it to an agency, and enable it for use. Click Name This Workflow to advance to the final step.

We strongly recommend users provide a detailed description of the selected workflow template, including the actions applied to the workflow.

For users enabled for branch support, assign the workflow to one or multiple agencies.

For users without branch support enabled, EZLynx automatically assigns the enabled workflow to all branch locations.

Before clicking Finish, check the box to enable the workflow. This will activate it in the system. Note that the system can take a couple of minutes to publish and enable a workflow.



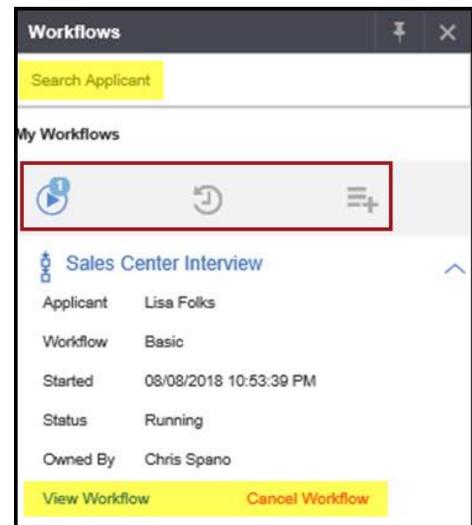

Agency Workspace – Workflow Icon

The Workflow icon functions similarly to the Task List icon. You can see your workflows (workflows assigned to you) and workflows associated to a specific applicant.

Click the Workflow icon to open the new workflow pane. My Workflows are shown by default when not on an applicant account. These are workflows assigned to you for all applicants.

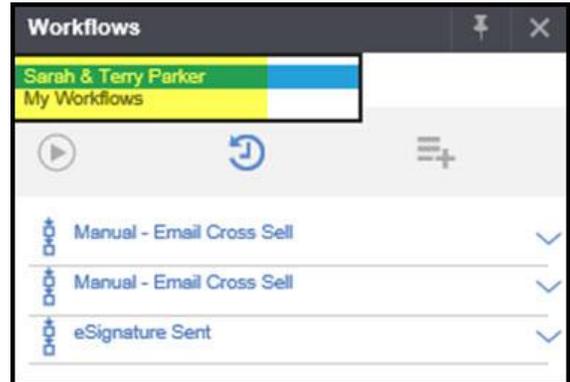
Display options:

- See **In-Progress** workflows
 - Please note that most of the time there won't be any results listed under In Progress. This is because the workflow engine will authenticate a workflow and execute its actions instantly. In Progress workflows will be more common in future releases when delays are allowed.
- View **History** of workflows
- Start **Manual** workflows
- View workflows for applicants in two ways:
 - **Search** for an applicant in the Workflow pane.
 - With an applicant account open, click the **Workflow** icon and it automatically loads their information.

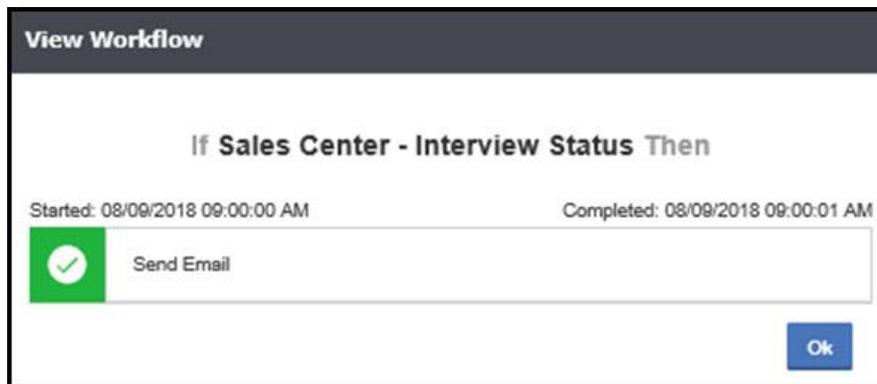


When viewing workflow history, you'll see:

- Applicant Name
- Workflow Type (All workflows in this version are 'basic')
- Start Time
- End Time (being either completed or canceled)
- Status
- Owner
- Links to **View Workflow** or **Cancel Workflow** (if In Progress).



You can also view the individual steps (or actions) associated to the workflow. Simply click on the 'View Workflow' option in the workflow history.



To start a Manual Workflow:

- Select the applicant in the Workflow pane.
- Click the **Start Workflow** icon.
- All available manual workflows are listed.
- Click the arrow on the far right and choose:
 - **View Workflow** to see all steps.
 - **Start Workflow** to initiate actions.

