

DATASHEET

# WORKFLOW AUTOMATION

Streamline your communications, reminders and updates with the GoMembers Workflow Automation module. Automate recurring reminder emails, automatically send updated meeting confirmations and receipts, remind staff of outstanding tasks and automate responses to updates.

Most association staffs are working shorthanded as it is and keeping up with the numerous emails and reminders that need to be sent on a daily basis is usually one of the first tasks to be overlooked. We all know the value of member communications. With Workflow Automation you have the ability to define e-mail templates that are personalized and reflect up-to-date information from the GoMembers database. Set them and forget them. Workflow will automatically send them when conditions change, dates are met or updates are processed within the GoMembers database.

## What Customers Are Saying

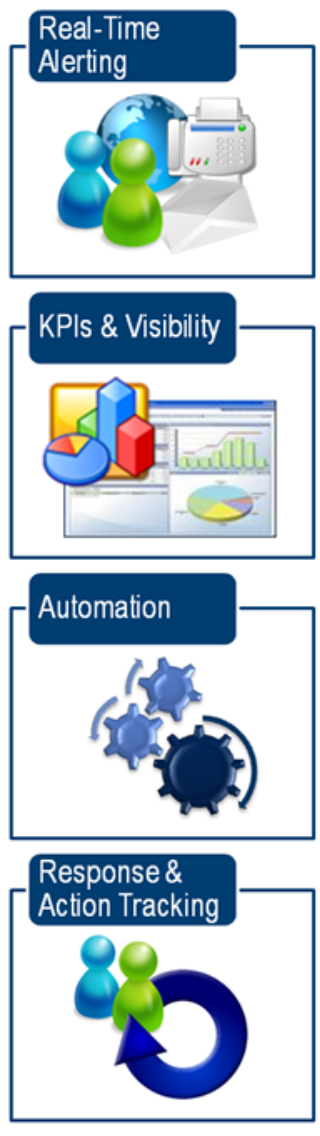
*“As a regulatory agency, we are obligated to keep our 19,000 licensees informed. In the past, KBML relied on postal mailings. Due to work volume and financial resources, KBML decided to move forward with Workflow Automation in 2013, by utilizing email notifications. Since then, we have incorporated as many as **48 workflows** encompassing many aspects of our business.*

*The workflows have allowed staff member’s to dedicate more time to their current job **saving us countless hours** of labor costs. KBML has been pleased with the execution of workflows and continues to think of ways the automation can benefit the agency.”*

**Sandy K. Brooks,**  
Office/Systems Manager,  
Kentucky Board of Medical Licensure

## What Can It Do For You

- **Automate** response to new member’s inquiries
- **Send updates** when a change is made to a registration
- **Generate** receipts when a payment is entered in the BackOffice
- **Alert staff** to open tasks
- **Send reminders** in advance of meeting dates
- **Alert members** when membership is expiring



# Key Features of Workflow Automation

- Use the standard Broadcast Email Templates to define your personalized mail-merge fields once and let Workflow do the rest
- Automatically create Contact records for each email sent associated with the Constituent and track what was sent and when
- Add follow-up activities and automatically update staff about tasks that need to be completed
- Send confirmations, payment receipts, renewal notices and more based on changing conditions in the GoMembers database
- Develop new workflows that meet your unique requirements

## How It Works

**Step 1:** Define workflow in back-office

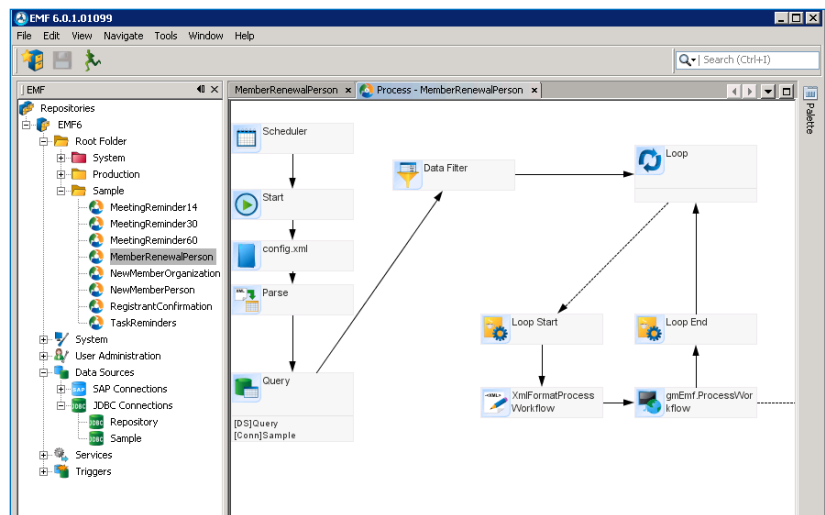


Workflow Code	Workflow Name	Workflow Description	Select
MtgReminder30	Meeting Reminder - 30 days	Generates an email to all attendees for any meetings o	<input type="checkbox"/>
MtgReminder60	Meeting Reminder - 60 days	Generates an email to all attendees for any meetings o	<input type="checkbox"/>
MtgReminder90	Meeting Reminder - 90 days	Generates an email to all attendees for any meetings o	<input type="checkbox"/>
NewMbrOrg	New Member - Organization	Generates a thank you email to the new member, and	<input type="checkbox"/>
NewMbrPer	New Member - Person	Generates a thank you email to the new member, and	<input type="checkbox"/>
TaskReminder	Task Reminder	Generates a reminder email to staff for tasks that are	<input type="checkbox"/>

**Step 2:** If workflow is to send email, then set up Email template in back-office including any merged fields



**Step 3:** Utilize EMF tool to define trigger points in database to look for certain data conditions to launch workflow



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