

# Avolin

## GoMembers

### 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 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

### Benefits

- Real-Time Alerting
- KPIs & Visibility
- Automation
- Response & Action Tracking

## 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

## 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

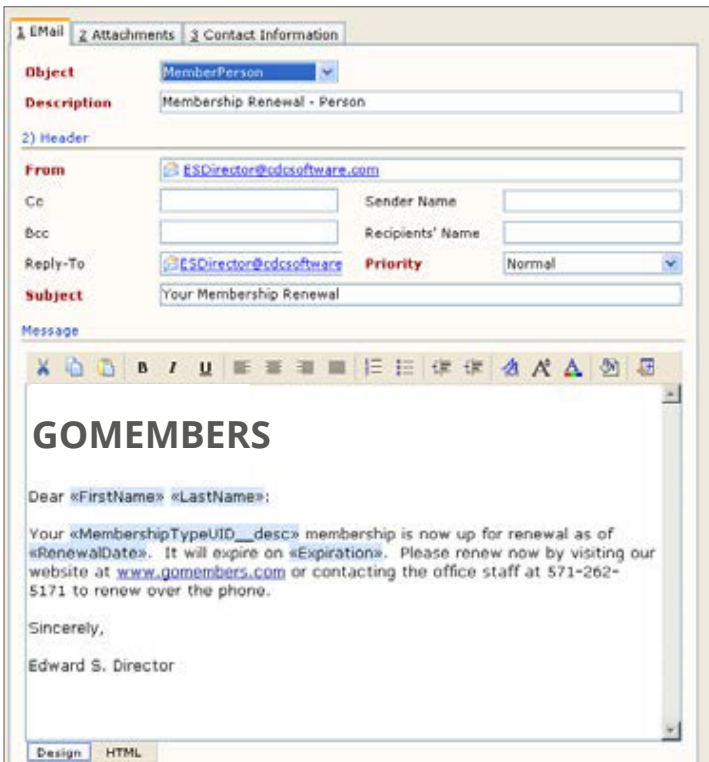
**Step 1:** Define workflow in back-office



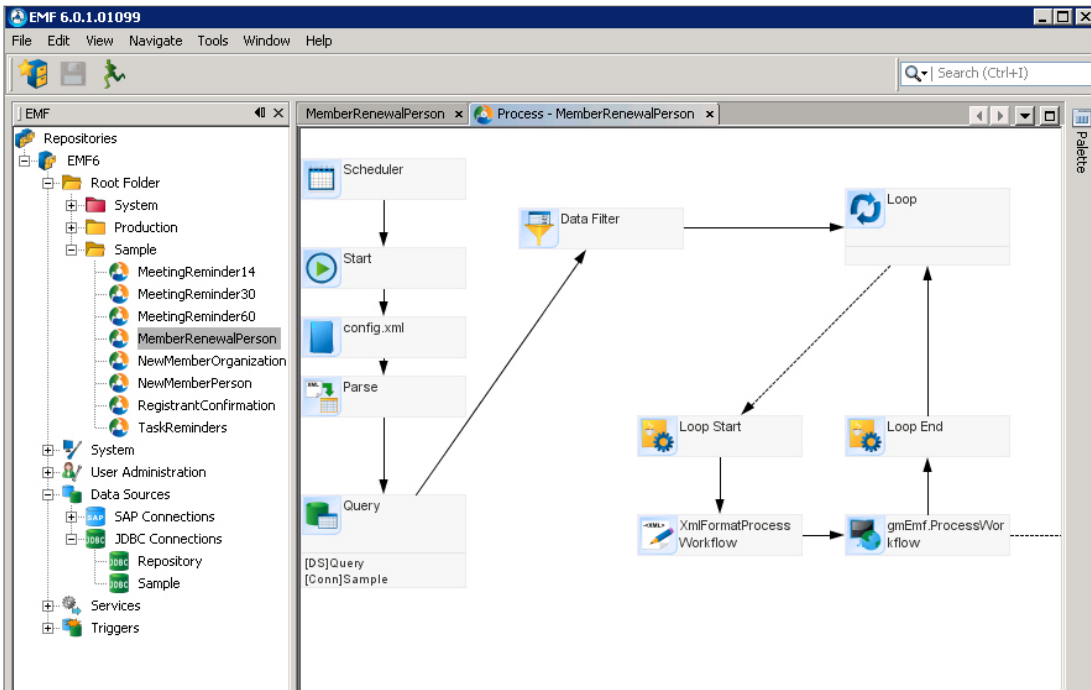
The screenshot shows a software interface with a table of workflows. The table has four columns: Workflow Code, Workflow Name, Workflow Description, and Select. There are six rows of data. The interface also includes a search bar at the top and a 'Page' indicator.

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



# Avolin

Avolin provides critical software solutions to enterprises around the world, specializing in Customer Relationship Management, Knowledge Management, IT Support and Supply Chain Management. Over 1,400 customers in more than 50 countries use our portfolio of solutions to help them provide outstanding customer service, keep their day-to-day operations running smoothly and make intelligent decisions based on relevant and real-time data. Our customers are at the center of everything we do and our singular goal is to deliver the right solutions for their industry-specific workflows helping to keep them at the forefront of their industries. For more information, visit [www.avolin.com](http://www.avolin.com).