




# Notes

Jun 25, 2026

# Meeting Jun 25, 2026 at 11:57 CDT

Meeting records  Recording

## Summary

Workflow management capabilities were reviewed alongside configuration best practices and future development timelines for the platform.

### **Workflow Configuration and Operations**

Workflows enable automated notifications through batched 2-hour processing intervals. Users manage distribution via automatic or manual queues to ensure data integrity.

### **Troubleshooting Workflow Logic**

Successful automation requires precise filter criteria and clearly defined action triggers. Troubleshooting involves validating filter accuracy and checking action-level settings to prevent communication failures.

### **Future Development Roadmap**

The product roadmap prioritizes billing and invoicing improvements, with no major changes to workflow functionality planned until 2027. This strategy defers major updates to maintain system stability.

## Next steps

- [Sam Bates] Review Task Workflow: Schedule a follow up session with Pat to diagnose the failed task notification process. Identify the root cause for why the automated alert did not send.
- [Sam Bates] Setup Twilio Integration: Work with Ryan to implement SMS messaging via the existing Twilio integration. Verify the effectiveness of merge fields within the text notification system.
- [The group] Submit Enhancements: Post feature requests and improvement ideas on the community page.
- [Sam Bates] Publish Materials: Upload the session recording and meeting notes to the community platform.
- [Sam Bates] Share Survey: Include the survey link within the community post.
- [Sam Bates] Improve Notifications: Update the calendar system to enable automated meeting notifications for participants.
- [The group] Complete Survey: Submit the 5 question survey including contact details and session feedback.

## Details

- **Definition and Limitations of Workflows:** Sam Bates explained that workflows are a feature introduced within the last two years designed to send automatic notifications based on specific filter criteria. Currently, workflows are limited to sending notifications such as tasks, emails, or discussions and do not possess the capability to update existing record values or system data. Because constant real-time processing would strain system infrastructure, these actions are handled in batched, two-hour intervals.
- **Navigating Workflow Management:** Users access the workflow menu to build new workflows, manage existing ones, or utilize the workflow queue. The system allows for two processing methods: automatic, where Striven handles notification distribution, or manual, where the user must verify and approve items within the workflow queue. A "view log" feature is also available for auditing, providing timestamps and details on processed actions.

- **Building a Workflow Foundation:** Sam Bates advised that a successful workflow begins with a clear idea of the objective, such as notifying a sales team about a new customer. Users must assign a descriptive name to their workflow to facilitate effective reporting and management, and while the creator is set as the default manager, they can grant view or management access to other team members.
- **Selecting Data Sets and Triggers:** Workflows must be based on one of eight available data sets, excluding transaction-based data like payments or invoices. Sam Bates encouraged users to submit enhancement requests for any data sets they find missing. Within a workflow, users can configure multiple triggers, which require unique, descriptive names to simplify future troubleshooting and system adjustments.
- **Setting Filter Criteria:** When configuring filters, users have the option to import configurations from pre-existing reports, a feature introduced in Quarter 1 of this year that aims to save time. Alternatively, users can build filters from scratch using the same interface available in the custom report builder.
- **Validating Workflow Filters:** After applying filters, the system displays a "current search results" label, which confirms if the criteria are identifying the intended records. Although this provides a count of found records, it does not generate a link to the specific items, meaning users must build a standalone report if they need to audit the individual entries found by the workflow.
- **Defining Workflow Actions:** In a default system, users can configure four primary actions: sending an email, sending a discussion, creating a work order, or creating an opportunity. If a Twilio integration is enabled, a fifth action—sending a one-way text message—becomes available. Users can configure these actions to initiate communication, such as sending a discussion to a sales team regarding a new customer.
- **Scheduling and Recurrence:** Workflows allow for scheduling delays, such as triggering an action one day after a record meets the criteria. Users can also set fixed dates or establish recurrence patterns to repeat notifications daily, though Sam Bates cautioned that users must ensure filters are correctly maintained to prevent unintended, perpetual notifications.
- **Sender Assignment and Messaging:** Users can specify the sender of the notification, selecting either a specific employee or an individual assigned at the customer level, such as a sales representative. When composing the notification

message, users can utilize merge fields to automatically populate contact information, avoiding the need for manual data entry.

- **Workflow Queue and Automation:** Enabling the automation checkbox relinquishes manual control, allowing Striven to fire off notifications at the next batched interval. Sam Bates recommended that new users keep this setting disabled initially, using the workflow queue to monitor and verify that the system is capturing the expected records before fully automating the process.
- **Publishing and Timing Intervals:** Publishing a workflow involves setting the batch schedule, which operates on two-hour intervals based on Eastern Time. Users must account for this time zone difference if they are operating in other regions. Additionally, users can restrict notifications to occur only on weekdays, preventing actions from being sent over the weekend.
- **Breakout Sessions:** To facilitate discussion among the 34 attendees, Sam Bates paused the main presentation to conduct breakout sessions. These groups provided a forum for users to discuss specific workflow use cases and ideas before returning for a final Q&A segment.
- **Troubleshooting Task Reminders:** Following the breakout sessions, Pat McNelley discussed a failed workflow intended to send task reminders 24 hours in advance. Sam Bates explained that if a task does not have time settings enabled, the system defaults to 12:00 a.m., which can affect trigger timing. They reviewed the configuration to diagnose why the "tomorrow" filter had not correctly queued the notification.
- **Feedback and New Use Cases:** Sam Bates highlighted a new data set for customer assets that allows for maintenance-based workflow reminders. During the breakout report, Gabrielle Seely shared that attendees discussed using tasks for appointments and expressed interest in using Twilio for text notifications in these scenarios. Sam Bates expressed interest in these insights and suggested further testing of customization options.
- **Troubleshooting Methodology:** Sam Bates outlined a two-layer troubleshooting approach: verifying that filter criteria capture the correct records and ensuring the action portion of the workflow—such as recipient email addresses or category filters—is correctly configured. Failures often occur when action-level filters are too restrictive, preventing the system from sending the notification even if the initial record search was successful.

- **Roadmap and Future Updates:** Regarding the product roadmap, Sam Bates stated that Q3 and Q4 are focused on revamping bills, credits, and invoices, with no major changes to workflow functionality planned until 2027. However, the team remains open to pivoting if critical enhancement requests are received.
- **Feature Requests and Enhancements:** Participants discussed requested features including the ability to pull workflows into reports for better auditing, the ability for workflows to update existing record statuses, and task dependencies, such as creating a new task upon the completion of another. Sam Bates acknowledged these as valuable ideas and noted that task dependencies are being considered for the product roadmap.
- **Closing and Survey:** Sam Bates shared a survey link in the chat to gather feedback on the meeting and solicit topics for future sessions, such as custom reporting or dashboard configuration. The session concluded with Sam Bates offering to remain available for further questions.

You should review Gemini's notes to make sure they're accurate. [Get tips and learn how Gemini takes notes](#)

How is the quality of **these specific notes**? [Take a short survey](#) to let us know your feedback, including how helpful the notes were for your needs.