

Groove Flows Instructions

Sept, 2020

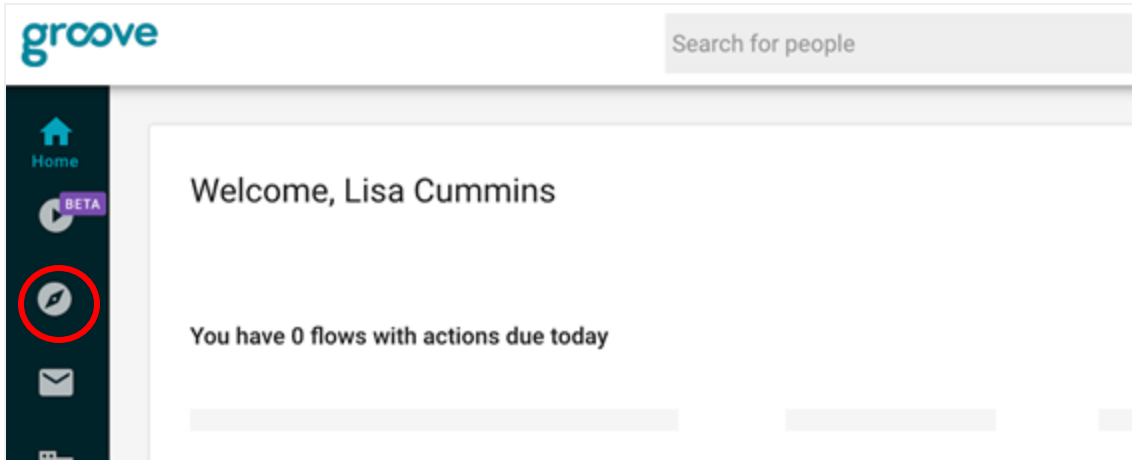
groove



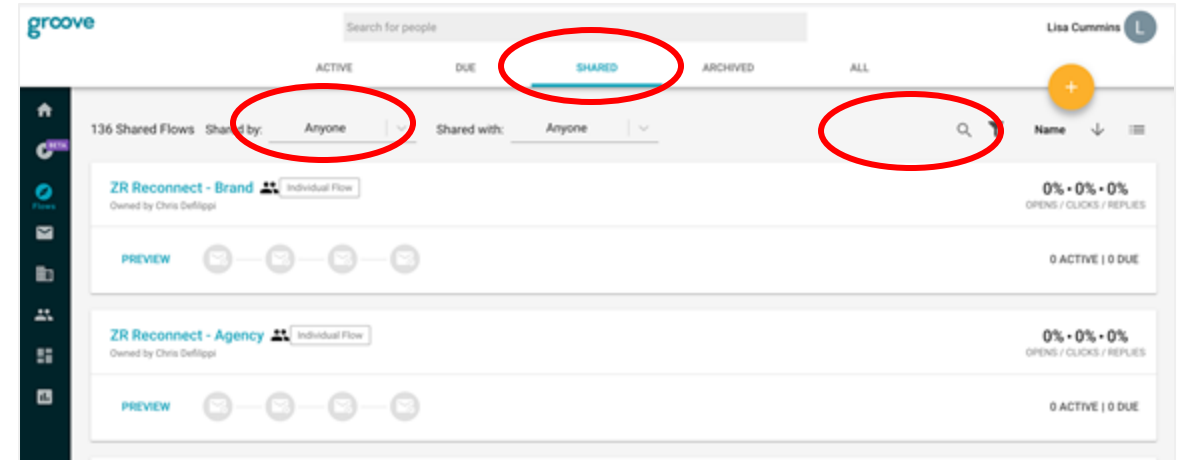


Customizing Groove Flows

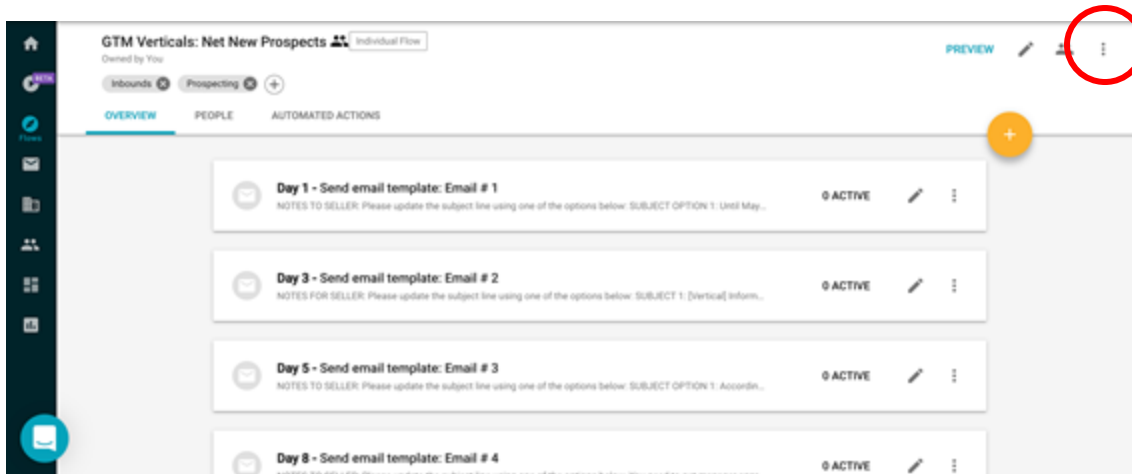
1. In Groove, open the flows (icon that looks like a compass)



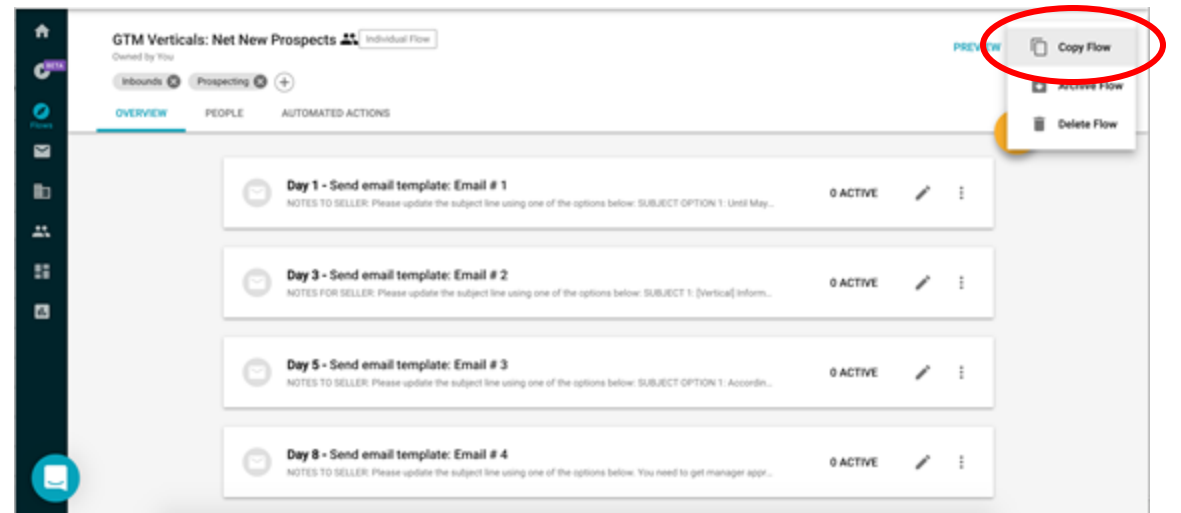
2. Any easy way to find a specific flow is to click on “shared” then filter by “Shared By” or Flow Name *Ex. Inbound Lead**



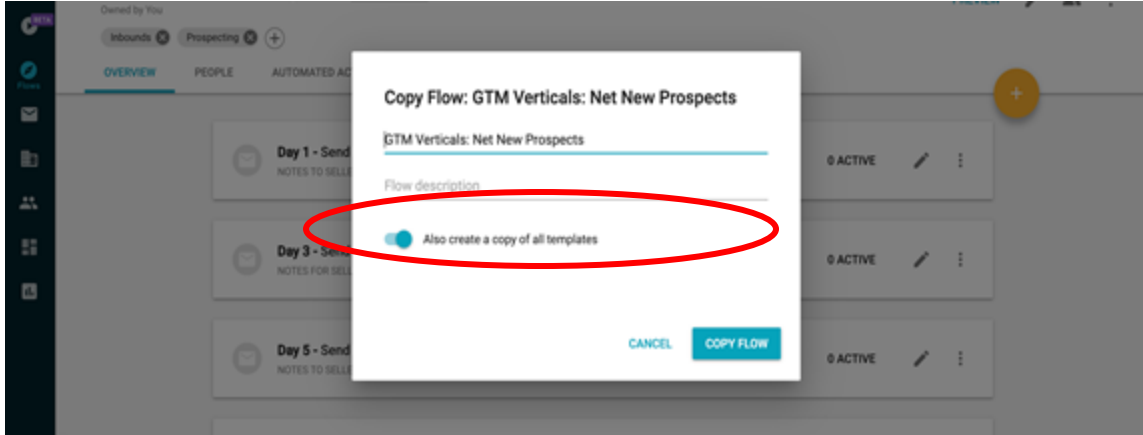
3. Click on the three dots at the top right of the page



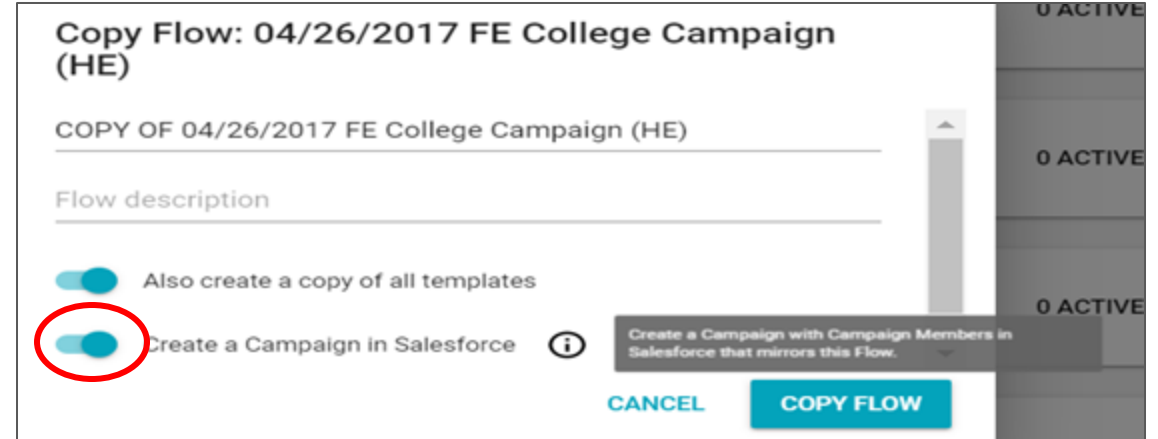
4. Select “Copy Flow”



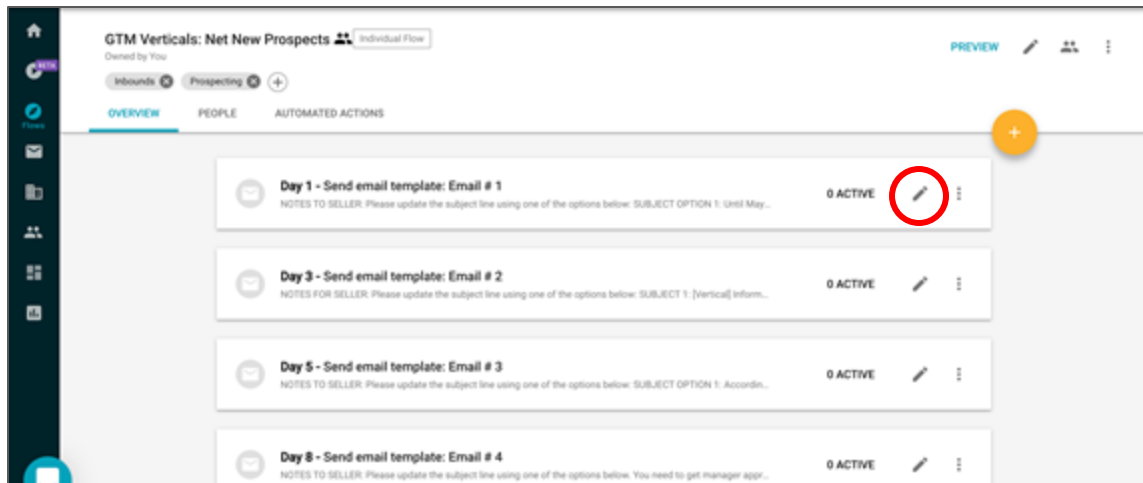
5. A box will appear giving you the option to update the title. It's recommended to also create a copy of the templates and then press "copy flow" to save.



6. You also have access to create a new campaign in salesforce, it is recommended to check first with Marketing team in order to avoid any duplicate.



7. You are able to click on EDIT TEMPLATE to the right to edit either the flow, subject line or body copy.





Salesforce Reports to use with Flows

1. You could use any of the following reports to send Campaigns to your salesforce contacts:

- [My open Renewal Opps](#)
Current Fiscal Year. With a possible lapse event . From Mutual Discovery to Stakeholder alignment pipeline stages . Are not considered the ones in Proposal, Contract Out & Sales Closed Won stages
- [All My Open Renewals to be closed next 90, 60 & 30 days](#)
My open renewals with an expected close date in the next 90 days.

3. In case is needed, renamed, change description and select the right folder. (you could use the same Folder "Apac for Groove Farmers").

Save Report As

* Report Name
Copy of APAC/ My Open Opps with Contact

Report Unique Name

Report Description
All your open opportunities (From Mutual Discovery to Contract out Stages) with contact roles and Account Admin

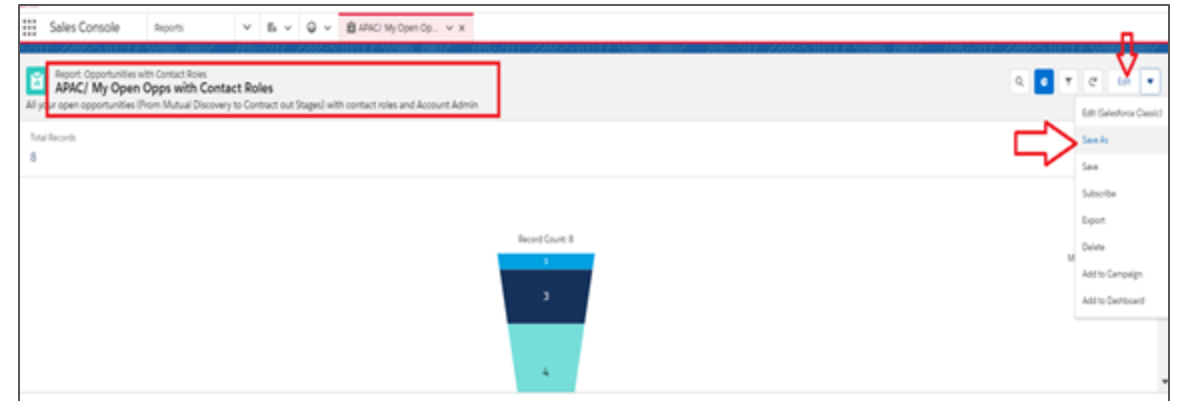
Folder
APAC/FOR GROOVE FLOWS/ HUNTERS & FARMER

Public or Private

Select Folder

Cancel Save

2. Select and open the report. In case you would like to create your own version, click on "Edit" and "Save as"



4. Either, you could export the full report. Click on "Export", select "Details Only" + "CSV" + "Encoding" "UTF-8".

Export

Export View

Formatted Report
Export the report as it appears in Salesforce, including the report header, groupings, and filter details.

Details Only
Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format
Comma Delimited .csv

Encoding
Unicode (UTF-8)

Cancel Export

A person wearing headphones is sitting at a long desk in a modern office. The desk is equipped with laptops, a water bottle, and some papers. The office has large windows that offer a view of a city with many buildings. Two decorative pendant lights hang from the ceiling. The entire scene is overlaid with a semi-transparent blue filter.

Best Practices Shared Flows

Search and copy any of the following Best Practice Campaigns already shared with you!

1. [Farmers Flow/ For Renewals 90/60/30*](#)

- Flow appropriate for reminding customer about their upcoming renewal date. This flow contains 7 steps of email follow-ups. It also contains the following automatic actions:
 - Automatically remove people when the contact's opp has been updated to have the stage "Scope", "Contract Out", or "Sales-Closed Won"
 - Automatically remove people if their email address bounced.

1. [Renewals - At-Risk Opps*](#)

- Flow appropriate for following up with customers who have At-Risk opportunities. This Flow contains 4 steps of email follow-ups. It also contains the following automatic actions:
 - Automatically remove people who replied (excluding auto-replies).
 - Automatically remove people if their email address bounced.
 - Automatically remove people if the opportunity has "To be renewed by AM" is ticked

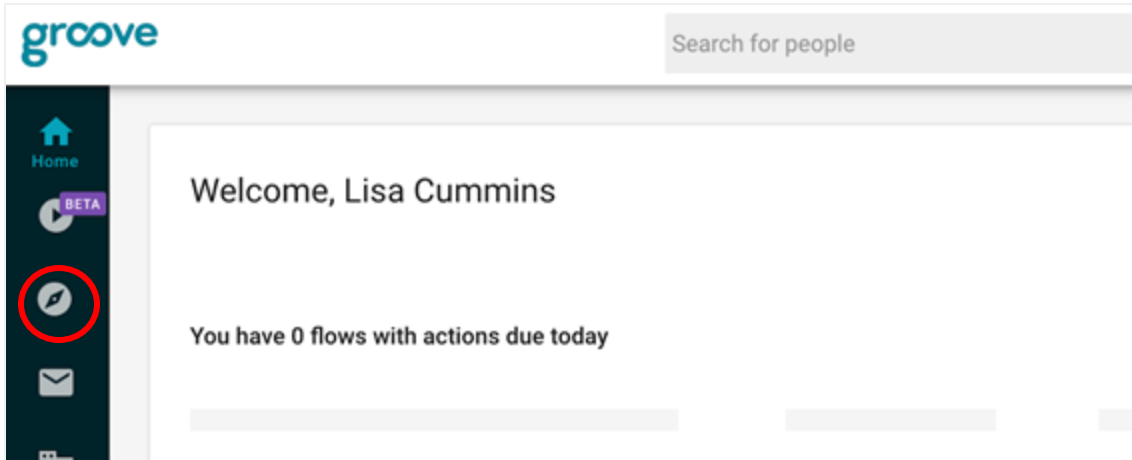
1. [Customer Engagement - No response from onboarding emails*](#)

- Flow appropriate for following up with customers who don't respond to onboarding emails. This Flow contains 3 steps of automated emails. It also contains the following automatic actions:
 - Automatically remove people who replied (excluding auto-replies).
 - Automatically remove people if their email address bounced.

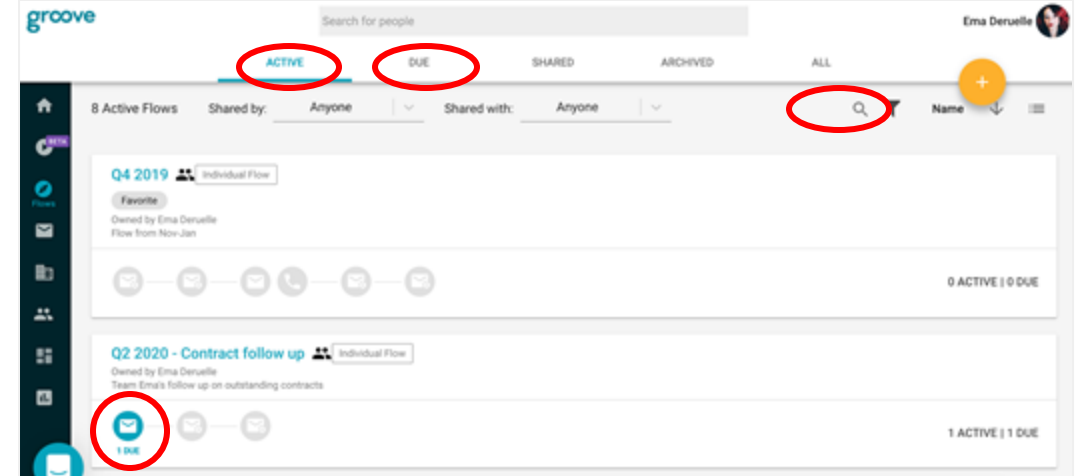


Adding Contacts from Salesforce to Groove Flows

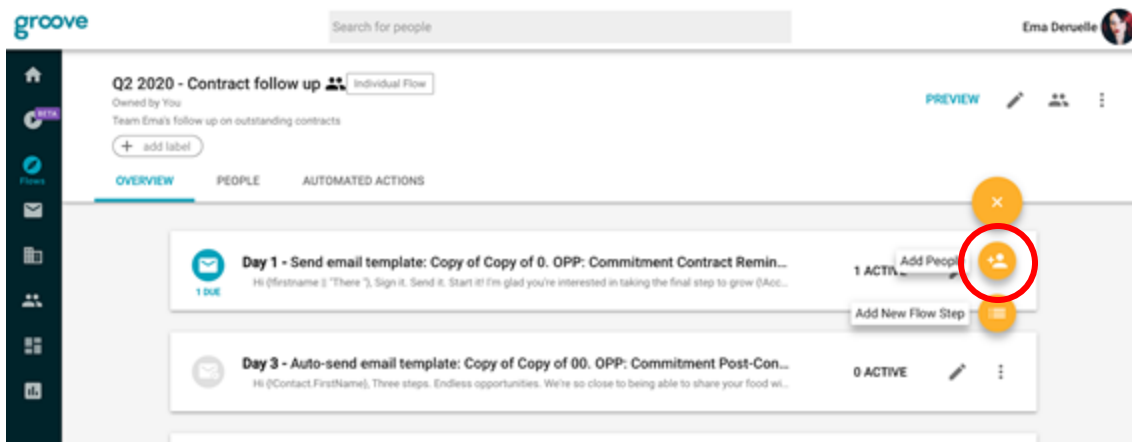
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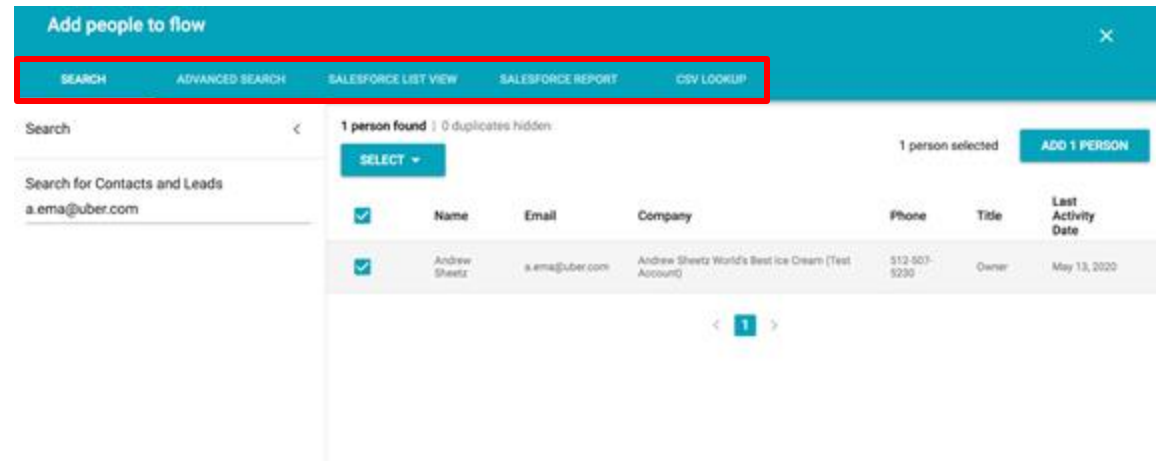
2. Click on the desired Flow Name. The Active tab will show flows created by you. The Due tab will show steps due for action.



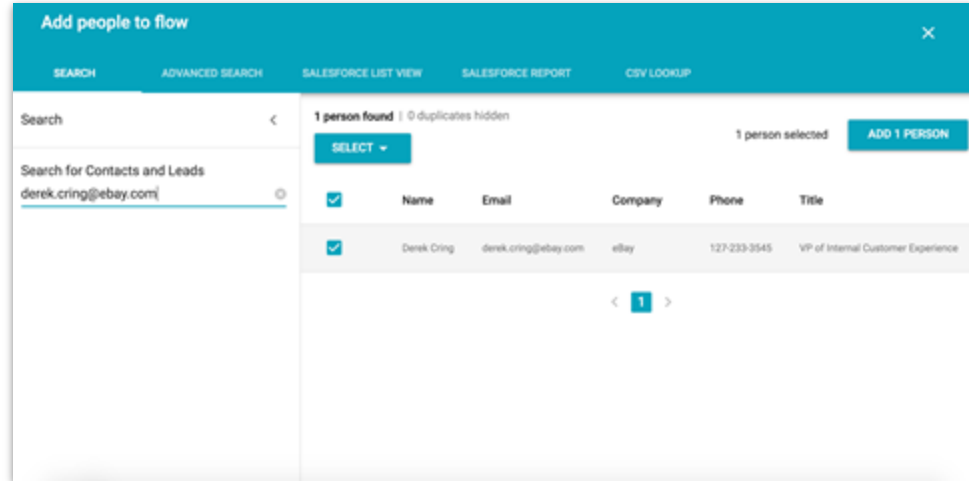
3. Hover over the orange plus button and press "Add People" to add people into your Flow.



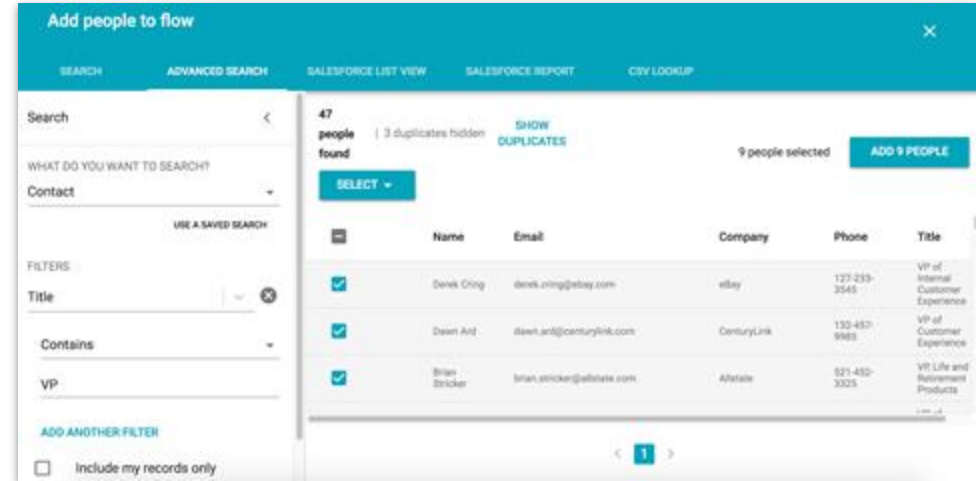
4. Select your import method



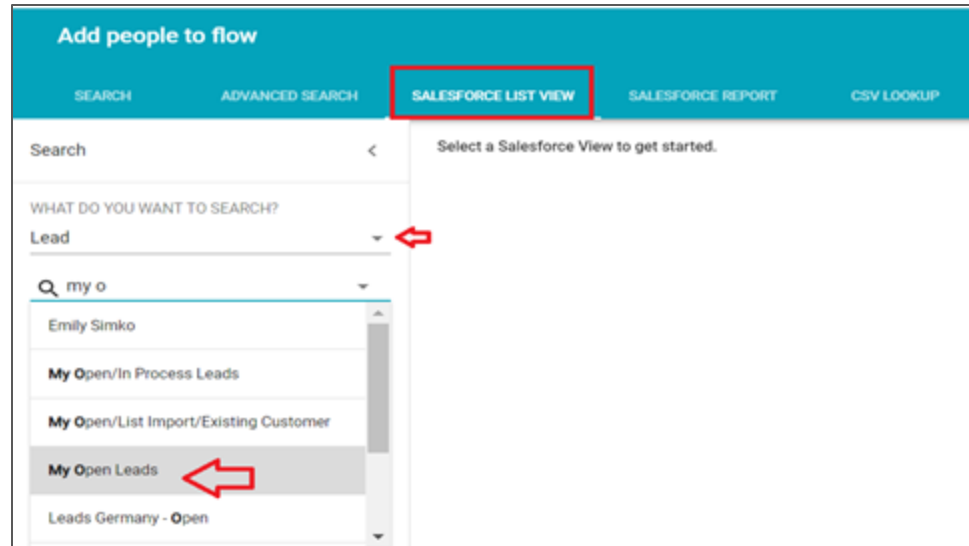
1. Search allows you to simply search for the email or name of the person/people you're looking to add to your Flow.



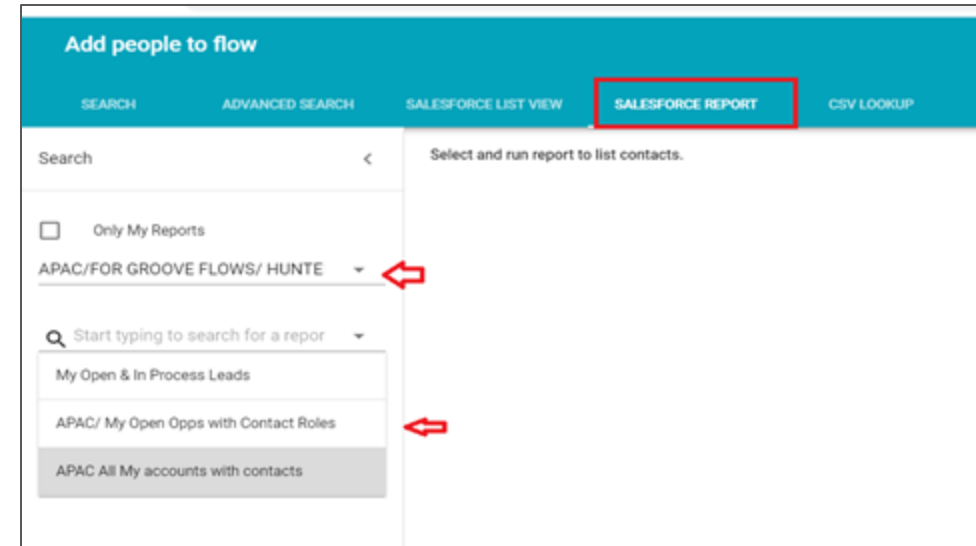
2. Advanced Search allows you to search by various filter criteria, so that you can pinpoint the people that you want added.



3. Salesforce List View enables you to use any Salesforce List View you've created to import people to your flow.



4. Salesforce Report enables you to use any Salesforce report that you have access to, in order to import people to your flow.





Thank You!