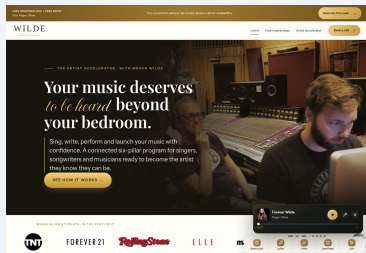


Workflow design before automation

Plan triggers, actions and stop conditions on paper.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 Choose one precise event that starts the workflow.
- 2 List each action in order and identify its owner or destination.
- 3 Define conditions that stop the workflow, including replies and completed bookings.
- 4 Test success, repeat triggers and exceptions with sample contacts.

EXAMPLE - ILLUSTRATIVE

A booked appointment should stop an automated reminder to book that same appointment.

CHECK YOUR RESULT

Have repeat events and stop conditions been tested before enabling the workflow?

Workflow design before automation

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Trigger:**Conditions:****Action sequence:****Stop conditions:****Fallback owner:****Test cases:****DONE WHEN**

Have repeat events and stop conditions been tested before enabling the workflow?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.