

Workflows (Ultimate Package feature) are optional advanced tools that can be created to automate responses, define in/out of office hour behaviors, pre-define SMS sending behaviors, send webhooks, and so much more. Note: This feature is defined as 'Use at Own Risk'.

Key Features

- **Personalize Automated Replies:** Tailor your out-of-office message to match your specific needs during different away hours. Inform your contacts of your unavailability and provide alternative points of contact or relevant information, creating a seamless experience for your correspondents.
- **Set Custom Away Hours:** With Clerk Workflows, you have complete control over when your automated out-of-office messages activate. Define your working hours, weekends, or any other specific periods to ensure your contacts receive appropriate responses at the right times.
- **Versatility for Multiple Inboxes:** Whether you handle multiple Phone Numbers or work as part of a team, Clerk Workflows can be effortlessly enabled across various inboxes. Stay organized and maintain consistent communication, no matter how many accounts you manage.
- **Real-time Updates:** Modify your automated out-of-office messages on the fly. Clerk Workflows allow you to adjust your settings instantly, so you're always in sync with your changing schedule.

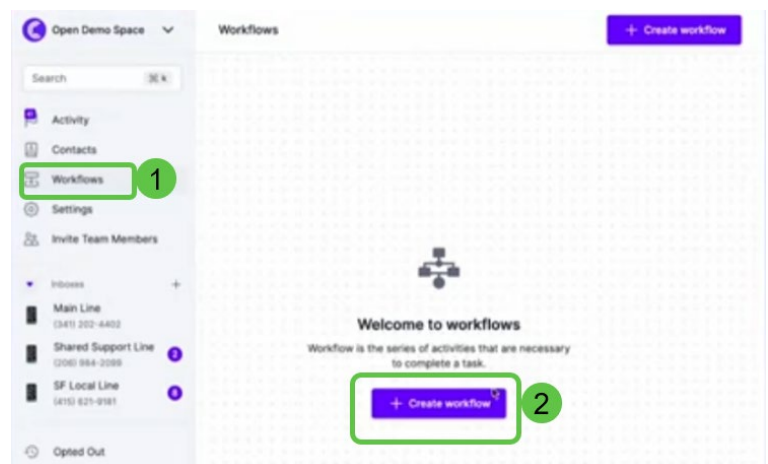
To Create a Workflow

While working in your Clerk Chat app (Ultimate license – Admin or Workspace Owner):

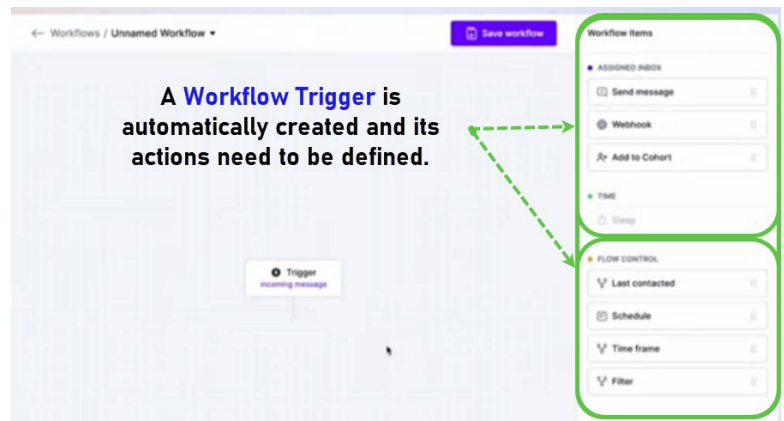
1. Click on the **Workflows** option in the left navigation menu.

This opens the Workflows view.

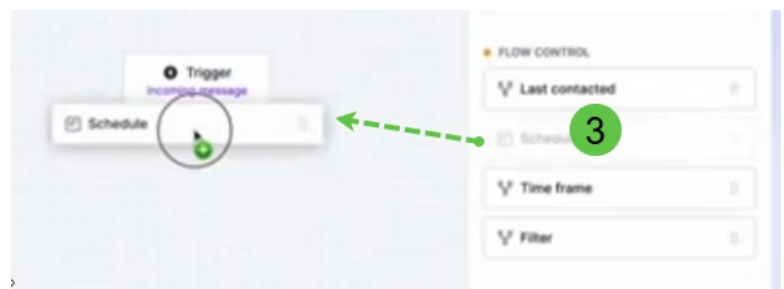
2. Click on the **+ Create Workflow** button (top right or center screen).



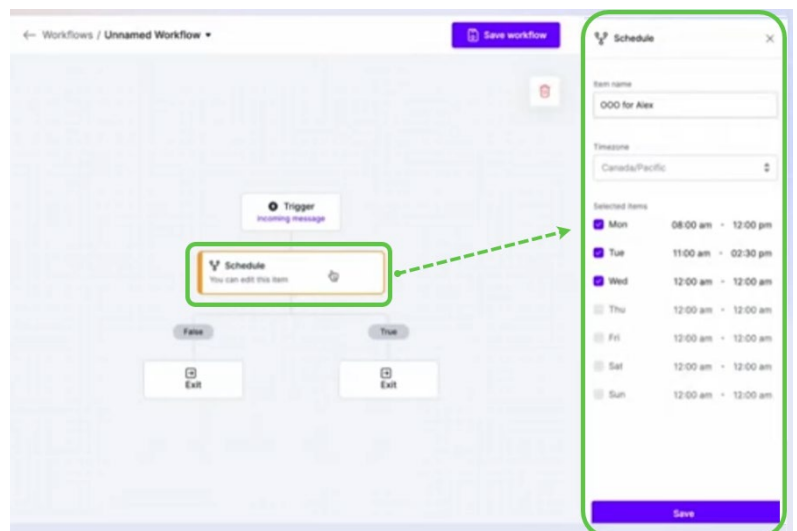
The service automatically presents a trigger for you to define as needed for your workflow using the tools to the right, and then Save for future assignment / use.



- Click on a **Flow Control** option for the workflow activation (far right) and then drag and drop it onto the Trigger (a plus sign displays when you should “drop”).
For this example, we will create an Out of Office workflow – so we chose Schedule.



- Click on the newly assigned flow action (center screen) to view and define it. The settings you define will impact the actions that will occur when activated by the trigger.
For this Flow Control we want it to trigger a set of actions based on the daily schedule times we define.



- Define the settings for the option you selected and added to the trigger. Each option offers unique settings.
For this example we must define the Name, a Timezone, the Days of the week and the specific time ranges for each.

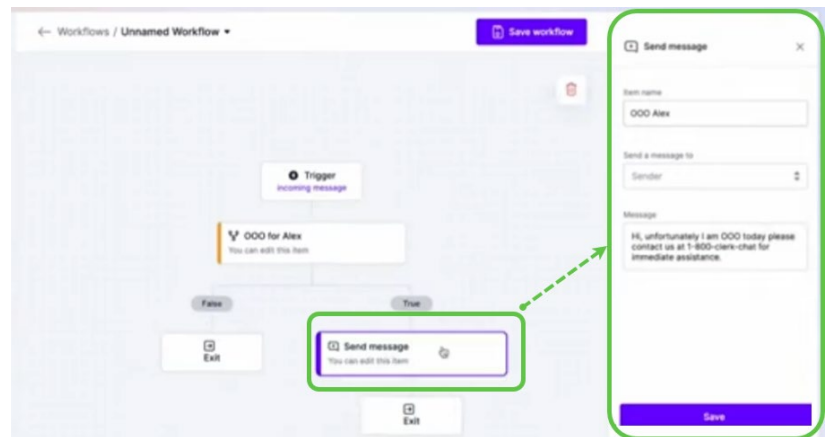
- Click **Save** at the bottom of the panel when ready.

- Next, you will set a True action by dragging and dropping an Assigned Inbox action on top of the True option.

For this example we will choose the Send Message option to automatically respond for our out of office workflow.



- Click on the **Send Message** action you just added to **True** to define the settings for this action. For this particular action, you must define a Name, select who the message will be sent to (options here could be cohort/group, phone number, sender, or recipient if it's an outbound trigger), and enter the contents of the message you wish to send.

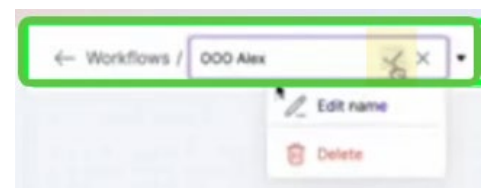


- Click the **Save** button at the bottom of the panel when ready.

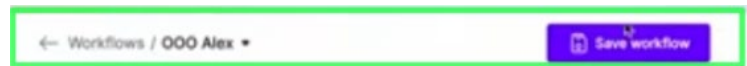
Repeat to create more actions if necessary.

- Name the new Unnamed Workflow using the Edit Name tool found in the drop-down menu at the top of the view.

Make SURE to click the adjacent check mark to save this name.

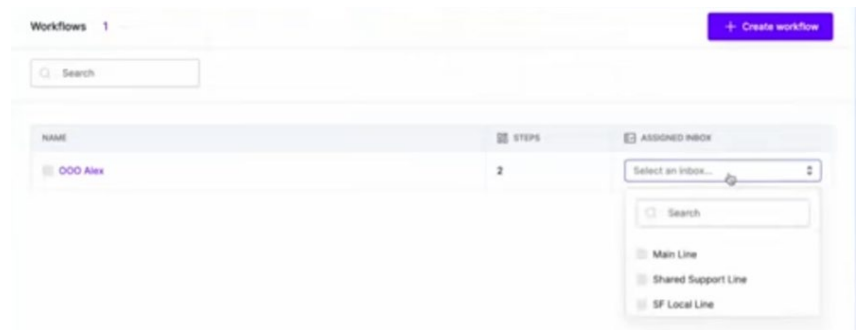


- Click on the **Save Workflow** button at the top of the view.



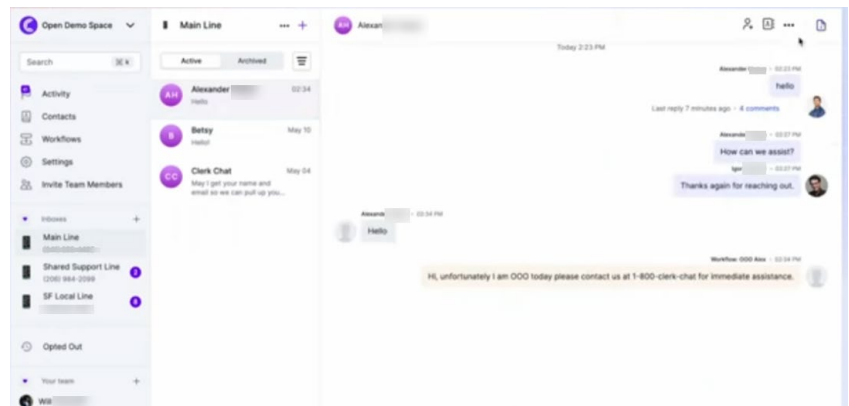
This saves the newly created workflow to your Clerk Chat team's list of workflows.

- Now this Workflow can be Assigned for use in the **Assigned Inbox** column.



Once assigned to an inbox, the OOO message will be sent as a response whenever the criteria defined for the workflow are met.

The basic steps to create, define trigger types and actions, name the workflow and Save - and then assign to one or more inboxes as needed can be used as the basic process for creating any new workflows no matter how simple or complex.



TIP

Check out the Clerk Chat Intro to Workflows 101 video.

This brief tutorial video offers a quick introduction to the power of Clerk Chat Workflows by walking through the basic process described here for a simple automated schedule based OOO message response workflow. Viewers will see how the basic steps to create, define triggers and actions, save and assign can be utilized by authorized users to set up and implement both simple and complex Workflows - quickly and easily.