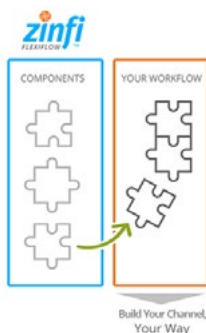# FlexiFlow™ Workflow Management

ZINFI's Unified Channel Management (UCM) platform comes with a dynamic configuration tool (FlexiFlowTM) that facilitates the design, configuration, and automation of various business processes. It guides ZINFI customers and their partners through a step-by-step logical design process to develop, test and execute automated business and campaign workflows. Configure Dynamic Page Layouts based on specific field value(s), logical operators and dependent single-select drop-down fields – with support for both Master Data and User-defined Data Sources. With FlexiFlowTM, the days of coding are gone and now you just have to drag, drop and build what you want to automate.

FlexiFlow™ Process Automation

Create sophisticated, targeted flows without the headaches, and give every contact in your database the attention they deserve. The FlexiFlowTM visual editor makes it easy to envision workflows in real time—while building simple or complex follow-up workflows. Use advanced segmentation logic to determine exactly who gets enrolled in your organization workflows and when. Create Custom or Associate Modules with custom fields viz. Text Box, Dropdown List, Date, Formula and Auto-number Fields, etc. Configure, Customize and Implement Regular Expressions, Unique Field Values, Record Type based Page Layouts, pre-filtered Record Lists/Related Lists/Lookups and Record Level Validation. Bulk Import Dropdown Field Values for Dropdown List and Multi Select Dropdown List Fields, Define Sort Order for selected values in a Multi Select Dropdown Field, Manage Page Layouts/Sections/Related Lists via drag-drop and Configure Sort Order(s) for List Pages/Search Parameters and Card Layout Pages.

The FlexiFlowTM engine automates the regular and repetitive tasks of a business process, allowing your organization to define workflows without any code changes, thus saving both time and money. The FlexiFlowTM engine also helps you to improve the stability of the platform—again, with no code changes required.
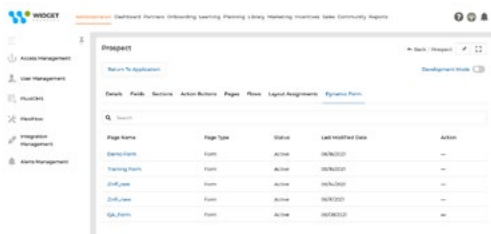

Key Features Include:

✔ Define workflows for MDF, lead management, campaigns, deal reg., etc.

✔ Automated Emails and Record Assignment based on defined conditions

✔ Define Default value of a Field and Archive Fields

✔ Automatic Record value update based on user provided criteria

Dynamic Form Builder

The latest upgradation to the FlexiFlow™ module, features creation of Dynamic Forms to input values and create module-specific Records, captured via the Dynamic Form created specifically for that specific module. For example, the Dynamic Form which the user will create for the Prospects module, will upload Prospect detail information to the Prospects Module.

Dynamic Forms can be further integrated with Marketing tactics - customized Campaign Pages and executed to the end-user. The Dynamic Form will help you to reach out to Prospects and capture valuable information through the Form directly - syncing the record(s)/information to the specific UCM module.

Key Features Includes:

✔ Module specific Dynamic Forms

✔ Selective UCM Module Fields

✔ Auto-Sync Information to Modules

✔ Downloadable Assets Configuration

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