

Workflows Masterclass

Join the multi-part masterclass to enhance your expertise and better utilise your accessplanit Workflows!



5 part blended course



3 weeks



£300 per person £995 per group*

* Up to 5 people

Masterclass Course Sessions

Each session must be completed to proceed to the next session in the masterclass

Crafting Effective Email Templates
2 hour trainer-led webinar

During this session, you will learn:

How to add and edit Email Templates

- How to add fields, links, & brand to Email Templates
- How to send Email Templates manually

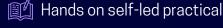
Creating Workflows



During this activity, you will:

- · Create a Workflow end-to-end from a choice of four!
- Test your Workflow

Creating Email Templates



During this activity, you will:

- Create an Email Template
- · Add merge fields to your Email Template
- Add formatting to your Email Template

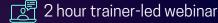
5 Advanced Workflow Options



During this session, you will learn:

- · How to send consolidated emails
- How to use Advanced Merge Fields
- How to troubleshoot issues with Workflows

Building and Testing Workflows



During this session, you will learn:

- How to create a Workflow and add Rules
- How to create Workflow Actions
- · How to monitor Workflow Instances

To book the Workflows masterclass for your business, please get in touch with your CSM at

customersuccess@accessplanit.com

You will receive a link to the recording for all 3 training sessions which you can download to share with your team or watch back at a later date!

Please note that if the training is required again in the future, this will be chargeable.