

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

1 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

2 Creating Email Templates



Hands on self-led practical

During this activity, you will:

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

3 Building and Testing Workflows



2 hour trainer-led webinar

During this session, you will learn:

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

4 Creating Workflows



Hands on self-led practical

During this activity, you will:

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

5 Advanced Workflow Options



2 hour trainer-led webinar

During this session, you will learn:

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

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.