Automatic follow-up for requests

Office guide · Crewstro

Every new request can get a reply within minutes, without anyone in the office having to remember. This guide shows how to turn the follow-up on, how to follow each lead inside the request and on the board, and how to take someone out of the flow.

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1. What the follow-up does

The ready flow is called **New lead: reply, then wait for the answer**. It starts by itself when a new request comes in (from the website, the booking page, a form, or created by hand).

1. **Right away**, the lead gets a text. If the request has no phone, the lead gets an email.
2. The flow **waits one day** for the answer.
3. **If the lead replies**, the office gets a notice and the flow ends.
4. **If not**, the office gets a task: call the lead.

Optional: the **Lead sitting for 2 days** reminder notifies the office and creates a task when a request stays New for 2 days with no contact.

> The flow stops by itself when the request is no longer New (you marked it contacted, made the quote or scheduled it). Nobody gets a message after they were already taken care of.

2. Turn the follow-up on

1. Open **Requests**.
2. On the **Follow up every new request automatically** card, click **See and edit the texts** if you want to change what the lead reads. `{{first_name}}` becomes the lead's first name and `{{company_name}}` your company name.
3. Leave **Also remind the office when a request sits 2 days with no contact** checked if you want the reminder.
4. Choose:
    - **Turn on now**: requests that come in from now on enter the flow.
    - **Create it turned off**: the flow is saved and does nothing. When you are ready, open the flow and click **Publish** (publishing turns it on).

After that the card becomes a strip: **Follow-up for new requests: On** (or Off), with a button to open the flow.

> Only people with access to Settings see the card and turn flows on or off. The plan must include Automations.

Simple or advanced

On the card you choose:

- **Simple**: the flow described above (one text, a one-day wait, a notice or a task).
- **Advanced: 5 touches in 5 days**: for leads nobody reached yet, following the Bellezas follow-up playbook. Each touch is a **call task** for the office plus a **text**: right away, 3 hours later, the next morning, the day after and on day 5 (closing). Texts only go out Monday to Saturday, 8:45 to 18:00. It stops when the lead replies or the request leaves New (for example, you called and marked it contacted). With no phone, two emails go out. The five texts are edited in the builder after you create it.

The template gallery (Marketing, Flows, New flow) also has **Estimate sent: 5 touches in 10 days (advanced)**: a text with the estimate in 20 minutes, then a call task and a text on days 1, 3, 7 and 10, until the estimate is approved or declined.

> **Already created the simple one and want the advanced?** The card only shows while there is no new-request flow. Open Marketing, Flows, New flow, pick **New lead: 5 touches in 5 days (advanced)** in the gallery and publish it. Then **turn off or delete the simple one**: with both on, the lead gets messages from both. If you do not want repeated tasks, also turn off the **Lead sitting for 2 days** reminder, since the advanced flow already creates a task at every touch.

Before you turn it on, check

- **A text line is connected** (in Settings). Without it the text does not go out and the activity shows "no phone line connected for texts".
- **The company email** is set up, for leads with no phone.
- If another system you still use also answers leads, **create it turned off** and publish only on switch-over day, so leads do not get two messages.

3. Inside the request: the Automation section

Open any request. The **Automation** section shows:

What you see	What it means
Flow name	Which flow the lead is in. If the flow was turned off, **Flow turned off** shows.
Status	Waiting for reply, Follow-up running, Replied, Follow-up finished or Stopped.

What you see	What it means
Current step	The step the lead is on now, for example **Waiting for the reply**.
Next step	Date and time of the next action, with "today", "tomorrow" or "in N days". While waiting, it is the end of the wait if the lead does not reply.
Replied?	Yes or Not yet.
Stopped	When and why (for example **Request handled** or **Stopped by the office**).
What already happened	Each text and email sent, with the time, and what came after (reply, notice, task). When something did not go out, the reason shows under it.

Buttons:

- **Open the flow**: opens the flow in the builder, on the **People** tab, where you see everyone in it.
- **Remove from the flow**: the lead leaves the flow. Texts and emails still waiting will not go out. The flow keeps running for everyone else. Only people with access to Settings see this button.

> To pause the flow for everyone, open the flow and turn it off. For one lead only, use Remove from the flow.

4. On the board

In **Requests, Board**, each card shows the automation status, for example **Waiting for reply · next step tomorrow**, **Replied** or **Stopped · Request handled**. Click the status to open the request.

At the top of the board, the **Automation** filter shows only the cards in one status: Waiting for reply, Follow-up running, Replied, Finished, Stopped or No follow-up. With the filter on, each column counts only the cards it shows. **Show all** goes back to normal.

5. On the phone

In the app's office mode, **Requests** shows the status under each lead and the automation filter buttons. Inside the request you get the same **Automation** section, with **Remove from the flow**. The flow builder is on the computer.

6. Common questions

What counts as a reply? A text that comes from the request's phone number (or, if the lead is already a client, any message on their profile). An email reply from a lead with no phone is not counted: check Conversations.

I changed the text. Do people already in the flow get the new one? People already in it continue on the version they entered. New texts apply to whoever enters after you publish.

The request is not in any flow. Why? It came in before the flow was turned on, or the flow was off. The flow does not go back in time.

Can I change the one-day wait, or add steps? Yes. Open the flow in the builder (Marketing, Flows), adjust it and click Publish.