# NO-CODE WORKFLOWS

Edify Workflows is a no-code, drag-and-drop customer experience design tool made for everyone. Create, iterate, and tailor automated or bot + human customer journeys without relying on IT. Workflows is the heart of Edify's flagship contact center software, Edify CX. It is also available as a standalone product for any contact center, regardless of existing technology, to design and deliver fully automated customer experiences.
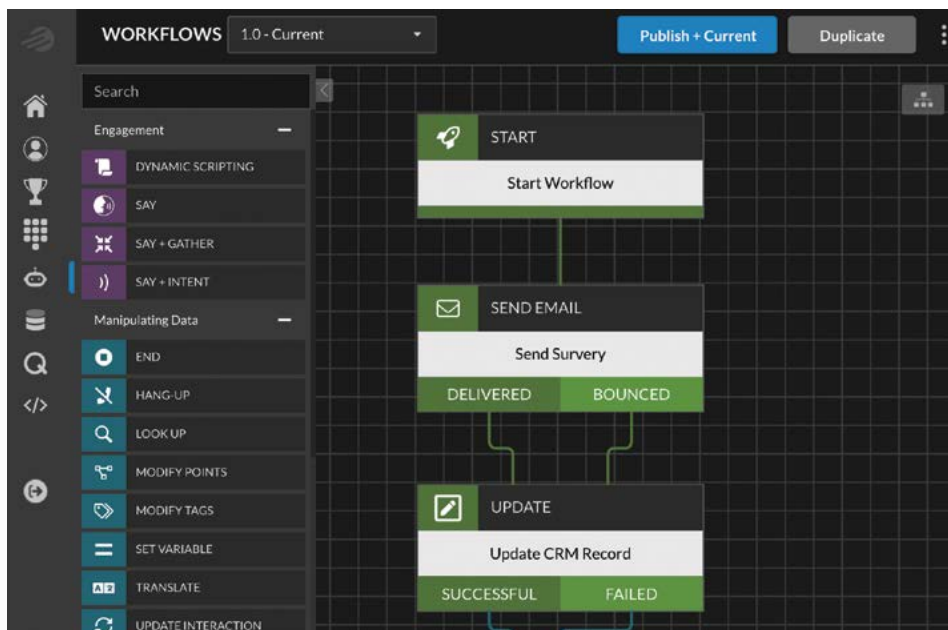
This simple workflow sends an email CSAT survey then automatically updates your CRM system(s) to show which customers received it.

WHAT IT DOES

- Replace legacy interactive voice response (IVR), interactive virtual assistants (IVA), and robotic process automation (RPA) tools
- Bring your contact center workflow vision to life by dragging, dropping, & linking modules together
- Understand customers' words, tone, & sentiment with built-in artificial intelligence (AI), machine learning (ML), sentiment analysis, & natural language understanding (NLU) capabilities
- Populate & validate data from external sources
- Redact sensitive information like credit card numbers & passwords, encrypt all data for security, & trigger actions that detect fraudulent activity & flag threats
- Synthesize vast amounts of data in seconds to offer rich, thorough agentless experiences

AT-A-GLANCE

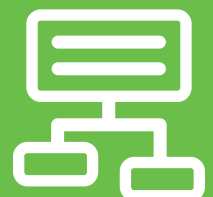Drag-&-drop workflow design tool

Built-in AI, ML, language detection, natural language understanding (NLU), & sentiment analysis

Automatic data redaction & encryption

Seamless database & CRM connections

No IT resources necessary

Use alone or as part of Edify CX

SETTING IT UP

Using Workflows is simple. Once you login and access Workflows, click "Create Workflow" to begin. Drag, drop, and configure modules in the editor workspace to create the campaign, program, or journey you envision. Add and delete modules, link them together, and move them around until you are ready to publish. Updating published Workflows is also a breeze with the duplication feature. The automation possibilities are endless when you have complete control and don't need to wait on IT or external resources.
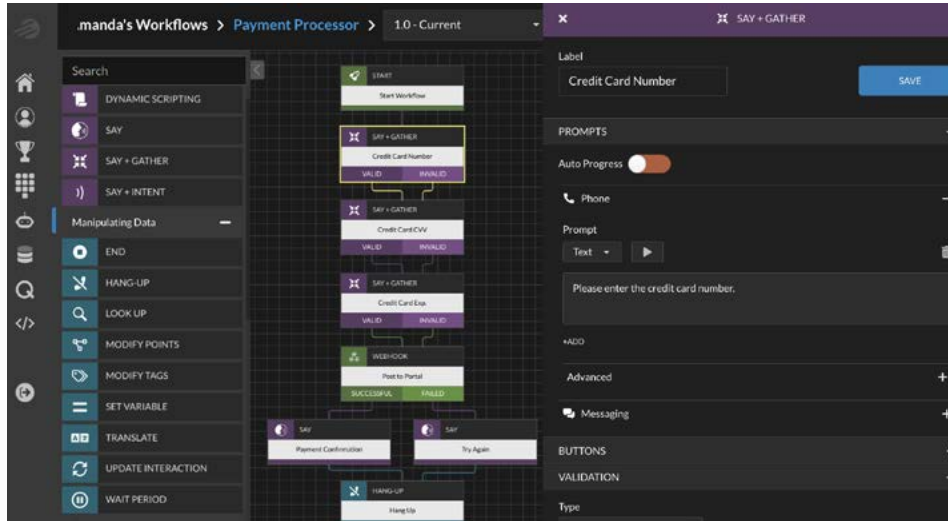
This workflow lets customers submit a secure payment through an AI-powered virtual assistant, saving agent and customer time while improving key KPIs.

WHAT'S IN IT FOR YOU

Companies use the Workflows capabilities from Edify to:
- Save IT time, agent hours, & speed their digital transformation from legacy tools
- Deliver elevated voice, chat, & SMS self-service options to customers
- Increase customer loyalty & satisfaction by providing proactive customer service notifications
- Ensures PCI compliance with automatic consent capture
- Quickly & accurately monitor NPS & CSAT scores with automatic Voice of Customer (VoC) surveys
- Improve employee experience by unifying disparate databases, applications, & private & public clouds for a comprehensive view of customer information in a single workspace

ABOUT EDIFY

Edify connects businesses with customers and employees with each other, making enterprise communications as easy as personal ones. Its flagship product, Edify CX, unites contact center (CCaaS), unified communications (UCaaS), and real-time communications platform (CPaaS/API) functionality in a single cloud-native solution that facilitates continuous conversations. Edify is also a Google Chrome Enterprise Recommended solution for the contact center.

Edify℠

SAMPLE USE CASES

Build omnichannel AI-powered bots for exceptional self-service

Collect customer information securely at any point during an interaction

Capture consent to demonstrate compliance

Conduct post-interaction surveys via any channel

Gather data from multiple sources

Create and configure dynamic scripts

Assist agents or flag managers based on detected key words or phrases

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