

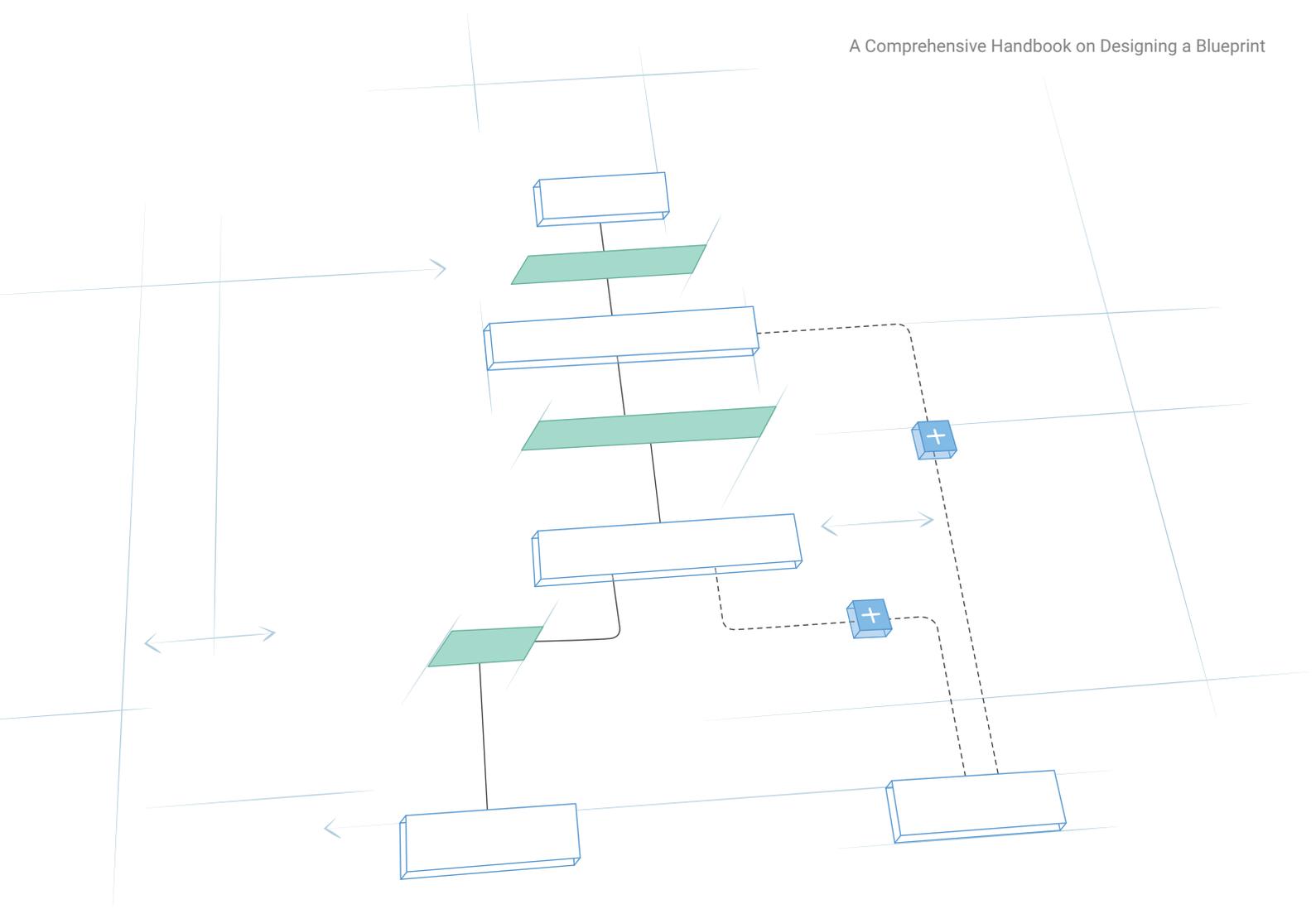
ZOHO CRM

BLUEPRINT

A Comprehensive Handbook On Designing A Blueprint

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Blueprint – An Overview

Blueprint is Zoho CRM's simple and effective solution to your process automation requirements. It is designed to help you execute a business process in a well-defined and systematic manner. With a Blueprint you can:

- Define the sequence of stages in a process.
- Associate the right people with each stage.
- Guide your teams through the execution of the process.
- Mandate and validate important information contextually.
- Automate routine actions.

The Zylker Story

Zylker Inc. is a software company that sells cloud applications. Their deal follow-up process is fairly simple. Once a deal has been qualified, it goes for negotiation. After approval of the discount, if any, the contract is sent to the customer and the deal is closed. However, the Zylker Administration is not very pleased with how the process is handled for the following reasons:

- Zylker has different teams to handle the different tasks in the deal follow-up process – sales, legal and finance, for example. Task delegation and collaboration between them becomes difficult without a streamlined process in place.
- Often, sales reps fail to collect mandatory information that is crucial as per the organizational policy.
- When they do enter the required information, it turns out to be invalid – such as an unacceptable offer of discount.
- Every time a discount is approved or a contract is sent, the sales team has to send out a follow-up email to the client or assign a follow-up task to another colleague—manually. This opens up ample room for errors.

The following sections in this handbook will show how a simple Blueprint in Zoho CRM can address these requirements, automate routine actions, and guide employees through every step of the sales process.

(The Zylker example mentioned above has been utilized throughout this handbook to demonstrate various concepts in Blueprint.)

Designing a Blueprint

Part I - Defining the process flow

A Blueprint is designed using States and Transitions. Before we get into the details, let's quickly understand what these terms mean.

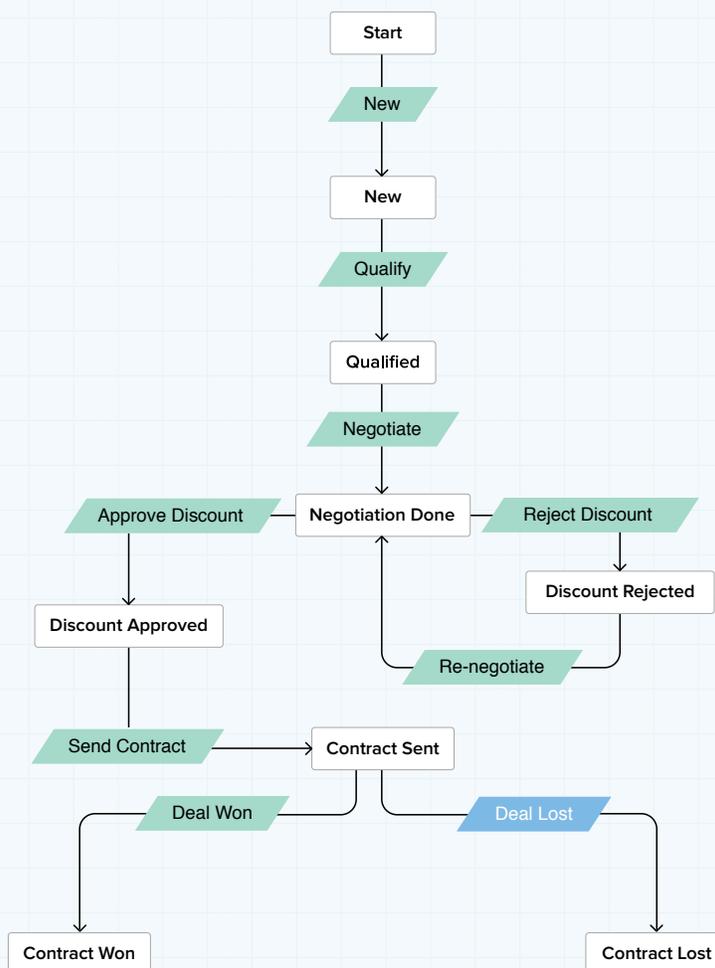
Definitions

State	Transition
<p>Each stage that a record should pass through in a process.</p>	<p>A set of requirements that allows a record to move from one state to another. Without completing necessary Transitions, a record cannot be moved to the subsequent States.</p>
<h3>Examples</h3> <hr/> <p>A deal in your sales pipeline might go through the following stages:</p> <ul style="list-style-type: none"> • Qualification • Negotiation • Discount Approval <p>These stages are called States.</p>	<p>To move a deal from Qualification to Negotiation, you may have to enter an acceptable discount and closing date.</p> <p>Details about these requirements could be defined under a Transition called “Negotiate.”</p> <p>Qualification → (Negotiate) → Negotiation</p>

To start designing the Blueprint:

- Under **Settings > Setup > Automation > Blueprint**, click **Create Blueprint**.
- In the *Create Blueprint* pop-up, select the **module** that you would like to create the Blueprint for, and the type of **layout**. Ex: **Deals** Module, **Standard** Layout.
- Specify the entry criteria to decide which records should enter the Blueprint. Example, *Deal Amount > \$50000*. Click **Next**.
- Drag and drop the required States from the *Available States* section into the *Blueprint Canvas*.

The following image shows a sample flow for Zylker's deal follow-up process.



The white blocks are the **States** in the Blueprint and the green blocks are the **Transitions**.

Define the process flow by connecting the nodes between the States. Add the Transitions between them by clicking the **PLUS (+)** buttons. At this point you will name the transitions. (Details about defining the Transition properties are discussed later in this handbook.)

Transitions appear as buttons in the *Detail* page of a record.

Note that you can create a process loop when required. Ex: In the sample flow above, there is a process loop right after the **Negotiation Done** State. When discount is rejected, it has to be re-negotiated. This brings the record back to the **Negotiation** stage.



Did you know?

There can be up to 12 outcomes from a State.

That is, one State can be connected to 12 different States through various transitions.

Part I - Exercise

This exercise will help you familiarize yourself with designing a process flow. Write down the name and description for a business process of your choice and 5 sample States in the space provided below.

Name:

Description:

.....

States:

Now use the work area below to design a process flow using these States and your own Transitions.

Process Flow



Part II - Configuring Transition Properties

Once you have defined the process flow, the next step is to define the Transition properties. Transitions are further divided into three sections for ease of use – **Before**, **During**, and **After**.

Definitions

Before Transition	During Transition	After Transition
<p>Decides who should execute a Transition and when it must be executed.</p>	<p>Decides what information should be prompted at a given stage, in order for the record to move to the next stage. This information can also be validated.</p>	<p>Decides the actions to be automated by the Blueprint after a Transition has been executed.</p>
<h3>Example Properties for the Transition - “Negotiate”</h3>		
<p>Transition Owner: <i>(Decides who should execute the Transition)</i> Amelia Burrows</p>	<p>Add Message: <i>Enter the product discount and add any other notes on the negotiation.</i></p>	<p>Automate Email Notification to Sales Manager.</p>
<p>Criteria: <i>(Decides when this Transition button should be displayed)</i></p>	<p>Add Field: Discount</p> <p>Add Validation Criteria: Discount <= 25</p>	<p>Send Email: Associate the “Discount Approval Request” Email Template</p>
<p>Product Demo Status is Completed</p>	<p>Error Message: Sorry! Discount cannot be greater than 25%.</p> <p>(✓) Make Notes Mandatory</p>	<p><i>(Other actions that could be automated are task assignment, field update, webhooks and custom function triggers.)</i></p>

The following image shows sample Transition Properties for the “**Negotiate**” Transition block:

Negotiate
Once the deal has been qualified, the... [Read More](#)

Common Transition

BEFORE DURING AFTER

OWNERS
Eligible Transitions can be displayed as buttons in the Record Detail page. Choose which users, group, or roles you would like to display these buttons for.

Users ▾

Record Owner Amelia Burrows
e.g. Users, Groups & Roles

CRITERIA
1 Product Demo Status IS Completed

Negotiate
Once the deal has been qualified, the... [Read More](#)

Common Transition

BEFORE DURING AFTER

Info and States **Transitions** (?)

Negotiate
Once the deal has been qualified, the... [Read More](#)

Common Transition

BEFORE DURING AFTER

EMAIL ALERTS +
Deal submitted for discount approval

TASKS +

FIELD UPDATES +

WEBHOOKS +

CUSTOM ACTIONS +

INSERT MESSAGE AND FIELDS:

- Enter the discount. ↑ ↓
- Make a note of the reason for deciding on this discount. ↑ ↓

Discount ↑ ↓
Discount <= 25
Sorry! We cannot offer a discount greater than 25%

Make Notes as mandatory ↑ ↓

+ ADD

Part II - Exercise

From the process flow you created in *Exercise-Part I*, specify the **Before, During, and After** Transition properties for one of your Transitions. Use the Transitions Properties table (mentioned under *Part II*) for reference.

NAME OF THE TRANSITION:.....

Before Transition	During Transition	After Transition
<p>Transition Owner: <i>(Decides who should execute this Transition)</i></p>	<p>Add Message: <i>(to guide your sales team)</i></p>	<p>Specify actions to be automated:</p>
<p>Criteria: <i>(Decides when this Transition button should be displayed)</i></p>	<p>Specify a Mandatory Field:</p>	<p>Details of the Action:</p>
	<p>Add Validation Criteria: <i>(to validate the field, if required)</i></p>	
	<p>Error Message: <i>(to be displayed in case the validation fails).</i></p>	
	<p>Make Notes Mandatory: <i>(Specify Yes or No)</i></p>	

Executing a Blueprint

Once you have configured the properties for each Transition block in a Blueprint and saved them, you are ready to execute the Blueprint. Do not forget to **ACTIVATE** the Blueprint to ensure that records, which meet the Blueprint criteria, are included in the process.

A record that has entered the Blueprint will contain a Blueprint strip in its Detail page. This strip displays the **Current State** and subsequent Transition buttons.

Click on each Transition to enter the required information as prompted and move on to the subsequent stages in the process.



Zylker Gold Edition - \$ 60,000.00

Deal Owner	Amelia Burrows 
Stage	Qualified
Probability (%)	10
Expected Revenue	\$ 6,000.00
Closing Date	May 30, 2017
Territory	Assign

CURRENT STATE

Qualified

TRANSITIONS

Negotiate

Deal Lost

There are also contextual messages and prompts. Any time an unacceptable value is entered, an error message as per your configuration will be displayed. This way, CRM guides your teams in correctly executing a process and also validates the information entered.

As soon as this Transition has been saved, any associated actions (Ex: Email alert) will be automated, as already configured.

Negotiate

1. Enter the discount.
2. Make a note of the reason for deciding on this discount.

Discount	40
Sorry! We cannot offer a discount greater than 25%	
Notes	Customer is part of the referral programme.

Cancel

Save

Accessing your Blueprint records

Visit the **My Jobs** module to see all your Blueprint records in one place. This module houses records that are waiting on a user for Blueprint Transitions as well as approval processes. Select *Only Blueprint* from the dropdown menu to see all records that require an action from you to complete a Blueprint.

The screenshot shows the 'My Jobs' module interface. At the top, there is a navigation bar with 'SalesInbox', 'Home', 'Feeds', 'My Jobs', and 'Leads'. Below this, the 'My Jobs' section has a dropdown menu set to 'Only Blueprint'. The main content is a table with columns: Name, Owner, InitiatedB, Blueprint/Process, and Actions. Two records are visible:

Name	Owner	InitiatedB	Blueprint/Process	Actions
Deal - Martha Hills	Martha Hills	Today	Deal fol...	Deal Lost Qualify
Zylker Print - Gold Editi... Deals	Amelia Burrows	1 day(s)...	Deal fol...	Deal Lost Qualify

The Blueprint Status field

Once a record has entered a Blueprint, you will see that the picklist field using which you've configured the Blueprint has been locked for editing.

Example, in the Zylker scenario, the **Stage** field will be locked for a deal that has entered the Deal follow-up process. This ensures that no one at Zylker can randomly edit the **Stage** field until the record systematically goes through every step in the Blueprint.

The screenshot shows a deal record form with the following fields:

- Amount: \$ 60,000.00
- Closing Date: Mar 31, 2017
- Stage: Qualified (locked with a padlock icon)
- Probability (%): 10
- Expected Revenue: \$ 6,000.00 (locked with a padlock icon)

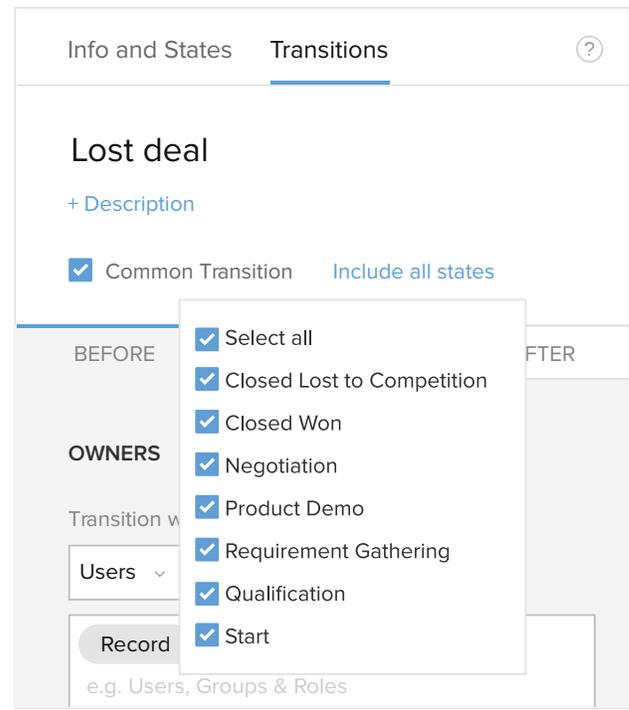
Buttons at the top include 'Edit', 'Create Button', and a menu icon. A red box highlights the 'Stage' field, and a red arrow points to the padlock icon next to it.

Common Transition

A Common Transition is a transition that can be executed from all States in a process.

For example, in a deal follow-up process, you typically know if you have won or lost a deal after the record goes through several stages, such as qualification, negotiation, discount approval, and so on. So **Deal Lost** is a Transition that is available only towards the end of the process.

But let's assume that a customer shows no interest and you want to drop a deal at the **Qualification** stage itself. In such a case, you must be able to execute the **Deal Lost** Transition right then - rather than go through all the intermediary stages.



To make this possible, you must make **Deal Lost** a Common Transition by selecting the Common Transition checkbox, as the image above shows. Once you do that, you will see the **Deal Lost** Transition on all States. Blueprint allows one Common Transition per process.

Blueprint Reports

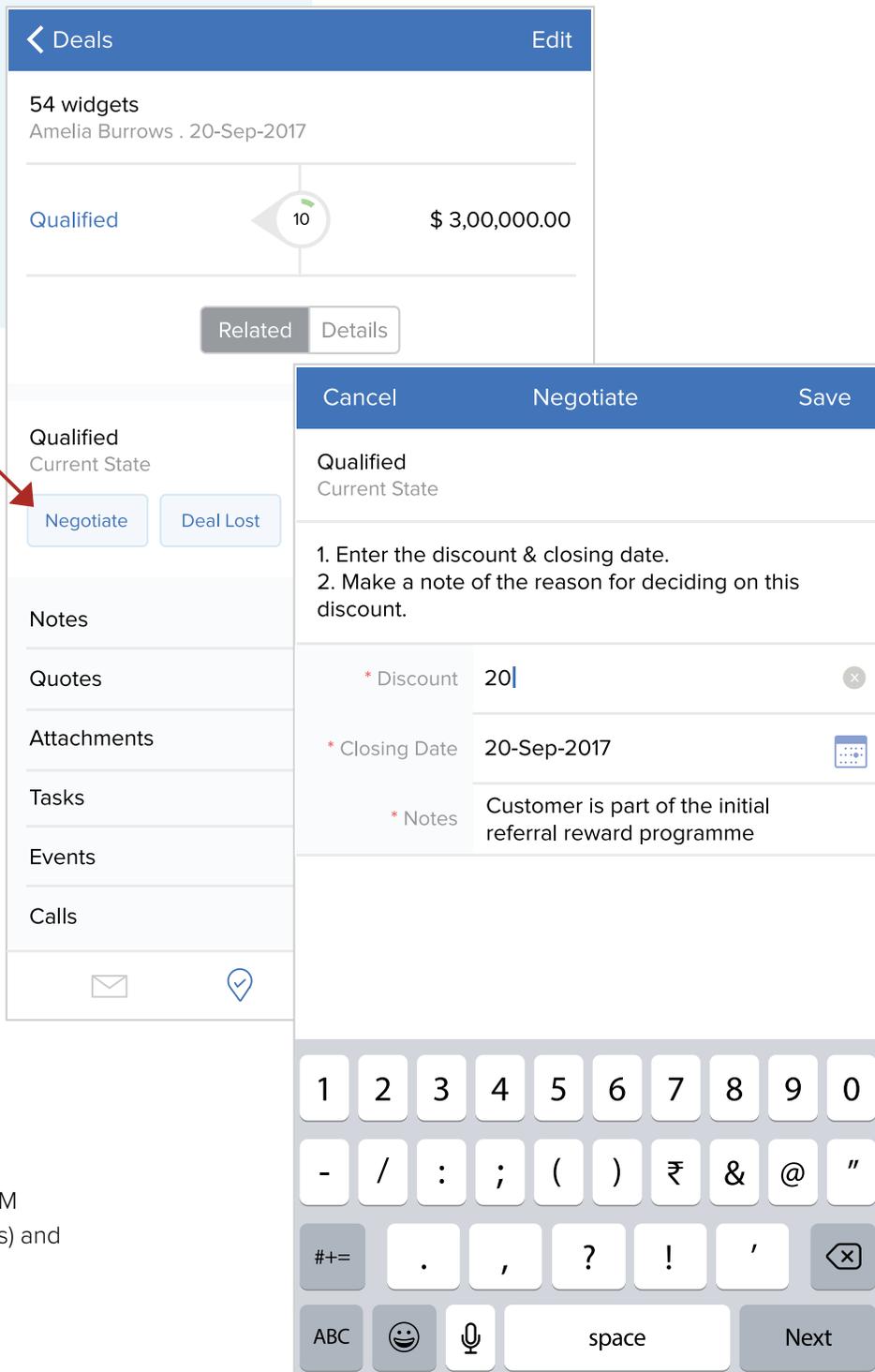
Blueprint in Zoho CRM comes with a default set of 7 reports to help you understand how a process is faring.

- Total time per Blueprint
- Total time per State
- Active records in a Blueprint
- Completed records
- Transition occurrences
- Number of records in a Blueprint
- Duration of States

Execute your Blueprint on the go!

Suppose you are meeting a client on a field visit and you land a deal. You don't have to wait till you get back to your desk to update the Deal Stage!

You can easily access the record from the Zoho CRM mobile app and execute the Transitions right from your smart phone!



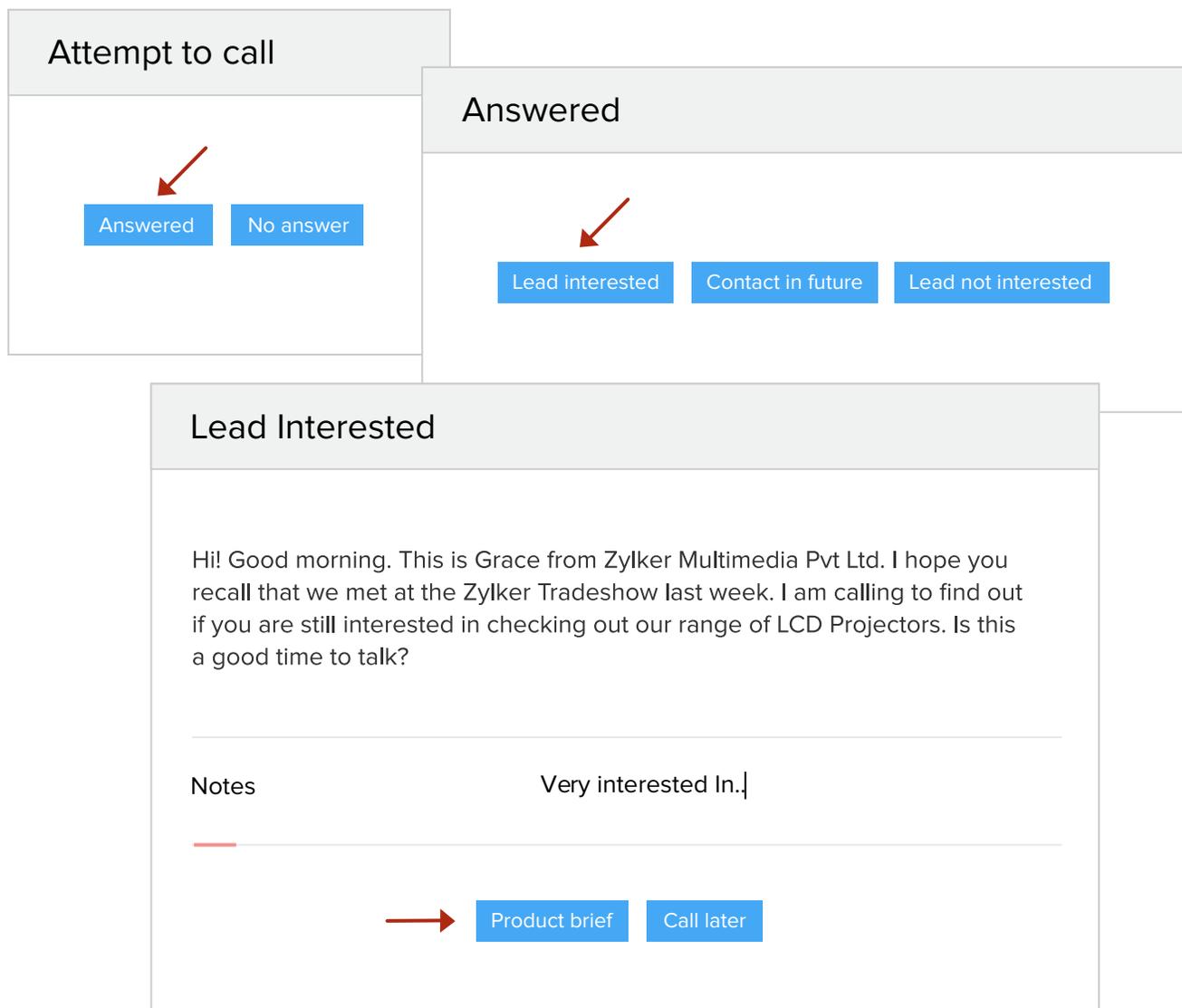
Blueprint is available in Zoho CRM for Android (from v3.2.16 onwards) and for iOS (from v3.2.9 onwards).

Continuous Blueprint

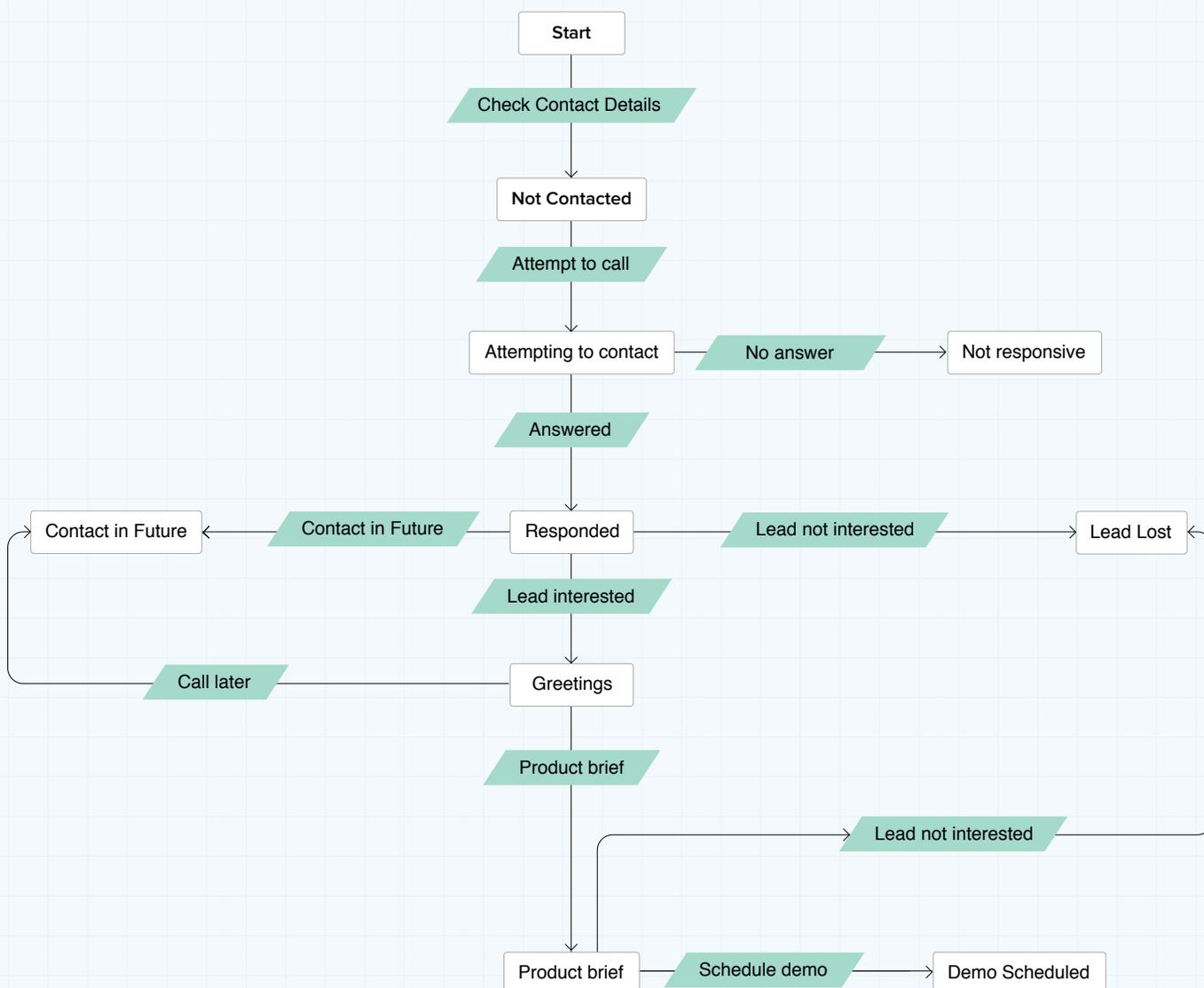
A Continuous Blueprint is an additional Blueprint configuration. While the Transitions in a regular Blueprint are intermittent, the Transitions in a Continuous Blueprint occur in the same popup without a pause. This is ideal for call scripting, as you can simply read off a script on the screen and move to subsequent stages quickly.

Here is a sample record, which is part of a lead follow-up process (Continuous Blueprint).

Once you click the desired buttons (**Answered, Lead Interested, etc.**) the suitable script for the instance is displayed as a message. You can move to subsequent stages in the Blueprint and complete the process in one go.



The process flow for the Continuous Blueprint above is as follows:



Summary

Blueprint solves each requirement mentioned under the Zylker Story and streamlines a business process. With Blueprint, you can ensure the following:

- The right people are assigned to each stage in your process.
- Relevant information is obtained contextually and duly validated.
- Your sales teams are guided with suitable prompts at each stage of the process.
- Routine tasks are automated.

DIY Exercises for Blueprint

Following are two sample business scenarios, which outline specific process automation requirements. Try and come up with your own version of a Blueprint for these hypothetical situations.

Scenario #1

Holiday Inc. is a travel company that wishes to automate their lead follow-up process. This involves a phone script to guide sales teams on the details of different tour packages, depending on the places chosen by the customer, during a call. Their process also involves collecting mandatory information, such as name, age, and photo ID of the travelers.

Configure a Blueprint in Zoho CRM to meet the following requirements:

- Ensure that a suitable telephone script is included in the Blueprint.
- Ensure that traveler information is collected contextually.

To help you get started, we have listed out a few sample States (i.e stages).

All you have to do is figure out the Transitions to create a process flow and configure the Blueprint.

Greetings → Lead Interested → Tour Package Selected → Product Brief →
Traveler Details Collected → Tentative Schedule Planned → Travel Confirmed.



Hint!

- A **Continuous Blueprint** is ideal for call scripting. Simply include the script as a message in the During Transition section.
- Mandating and validating fields as part of the During Transition section will ensure that required information is collected contextually.

Scenario #2

ABZ is an e-commerce business that deals with the sale of office furniture. They want to automate their order management process, which involves different teams such as inventory, quality control, shipping, and delivery. As the process is now, teams find it difficult to work together and to manually generate invoices whenever an order has been confirmed.

Configure a Blueprint in Zoho CRM to meet the following requirements:

- Ensure that each stage in the process is delegated to the right teams.
- Automate invoice generation after stock confirmation.

To help you get started, we have listed out a few sample States (i.e stages).

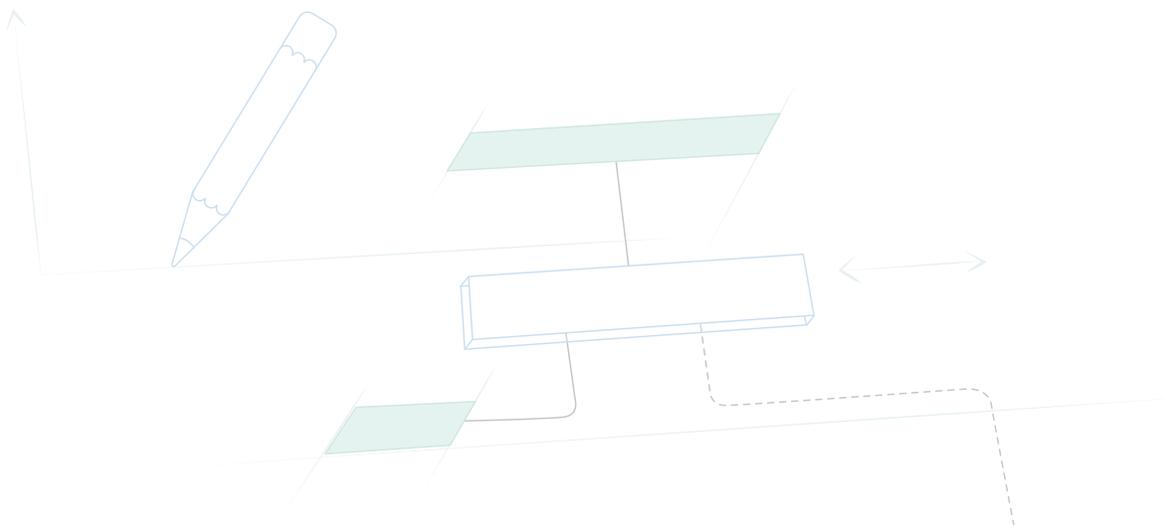
All you have to do is figure out the Transitions to create a process flow and configure the Blueprint.

Order Confirmed → Inventory Check → Product In Stock → Invoice Created →
Shipped to Customer → Order Fulfilled



Hint!

- Use relevant **Before Transition** properties to delegate the right stage to the right teams. Ex: *Check Inventory* Transition should be assigned to the *Inventory Department*.
- To automate invoice generation, write a custom function that will generate an invoice in Zoho Books automatically, and associate this function to the required **After Transition** properties.



Frequently Asked Questions

1

I configured a Blueprint, but records have not entered the process even though they meet the Blueprint criteria. Why?

Records may not enter a Blueprint for any of the following reasons:

- A Blueprint is disabled by default. Make sure that it is enabled.
- A Blueprint could be created for specific layouts. Verify if the record in question belongs to the layout specified in the Blueprint settings.
- If your Blueprint entry criteria contains a State unused in the Blueprint, the record would have already entered the process. However, Transitions will not be shown for that record as the State is not even part of the Blueprint.

2

What are the permissions required to configure a Blueprint?

You would require the **Manage Automation** permission in your profile to configure a Blueprint.

3

Can a Transition Owner execute a Transition even if they do not have access to the record?

Yes. When a Transition is assigned to a user who does not have access to the record, the user will be able to perform that Transition. However, they will not be able to edit the rest of the record.

A Transition owner can access records assigned to him/her from the **My Jobs** module.

4

How is it that a Transition that I have assigned only to a specific user is still visible to other users?

A Transition will still be visible to users other than the Transition owner, if the user is,

- An administrator
- Superior to the Transition Owner in the Role Hierarchy

5

Is there a limit on the number of Blueprints I can create?

- Yes. You can create a maximum of 200 Blueprints per module. This limit is inclusive of layouts across a module.
- A single Blueprint can have as much as 300 Transitions. A Common Transition is counted only once, even if it is technically mapped from all States.
- You can add a total of 50 fields and messages as mandatory in the *During Transition* section.

6

Is Blueprint available for Vertical CRM?

Yes. Blueprint is currently available in the Vertical CRM Live User Instance.

7

Can I automate the conversion of a lead once it has been updated to the “Qualified” State, via a Blueprint?

Currently, lead conversion is not part of Blueprint automation. However, you can set up a workflow rule to this effect, which says that whenever the **Lead Status** is updated to “Qualified”, convert the lead to a contact/account.

8

I have modified a Blueprint while there are active records in a process. Will this new change be reflected in the existing records?

If you modify* a Blueprint while there are still active records in the process, these changes will be applicable only to records created post the modification*. Records that have already entered the process will follow the previous version of the Blueprint.

(* Modification here refers to:

- **A change in the process flow**
- **Deactivation of a Blueprint**
- **Deletion of a Blueprint**

Note that modification here does not refer to changes made to the Transitions. Any change made to the Transition blocks in a Blueprint is effective immediately, regardless of new records or existing records in the process.

9

If I have configured Blueprints, as well as Workflow Rules and Approval Processes, which gets executed first?

When you have all automation features configured in Zoho CRM, the order in which they get executed are:

Assignment Rules, Workflow Rules, Approval Process, Blueprint and finally Case Escalation Rules.

10

Can an invoice be generated automatically in Zoho Books via a Blueprint Transition?

Yes. You must write a custom function that will generate an invoice in Zoho Books automatically, and associate this function as part of the Blueprint's **After Transition** Properties.

Additional Resources

Zoho CRM User Guide on Blueprint:

<https://www.zoho.com/crm/help/blueprint/>

Blueprint Tutorials:

<https://www.zoho.com/crm/tutorials/blueprint/summary.html>

Demo Video:

<https://www.zoho.com/crm/lp/demo19.html>

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