

Automations, Workflows & Tasks

Seven practical recipes for work that should happen next: follow-up tasks, appointment reminders, no-show recovery, and overdue escalation.

Path Processes > Automations and Processes > Workflows

Audience Agency admins who configure automations, workflows, and task categories

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What this guide covers

Use events in EnrollHere Dialer to create follow-up tasks, send appointment reminders, recover no-shows, and escalate overdue work. Each recipe below is one event, one condition, and one action.

EVENT	CONDITION	ACTION	GO TO
Dialer call disposition set	A named recycle disposition	Create scheduling task	Section 3
Appointment booked	Appointment Type selected	Create fulfillment task	Section 4
Appointment booked or updated	Eligible future appointment	Start reminder workflow	Section 5
Appointment updated	Disposition = No Show	Start reschedule workflow	Section 6
Dialer call disposition set	Disposition = App Submitted	Create delayed follow-up task	Section 7
Lead updated	Lead disposition matches	Create assigned task	Section 8
Task overdue	Task category matches	Notify or start escalation workflow	Section 9

FIRST DISTINCTION

A workflow does not book an appointment. Agents or AI book it. Appointment Types, Automations, and Workflows decide what happens after booking or after another event.

1. Pick the right tool

TOOL	USE IT WHEN	EXAMPLE
Appointment Types	Booking should create one fulfillment task immediately.	AEP Callback creates a completion task.
Automation	One event should trigger immediate actions.	App Submitted creates a follow-up task.
Workflow	The process needs waits, branching, messages, or a human Task step.	Confirm an appointment, then remind at 24 hours and 1 hour.
IVR flow	A caller requests a callback from the phone menu.	See the separate IVR Callback guide.

2. Before you build

- **Create Task Categories first.** Category defaults can fill the task name, dates, assignment, and dedupe key.
- **Use precise conditions.** Lead Updated and Disposition Set can fire often.
- **Add a Deduplication Key** when the same lead, call, policy, or task could trigger the automation more than once.
- **Test with one record** before activating the automation for the full agency.

3. Call ends without an appointment → task to schedule one

USE	START HERE	RESULT
Automation	Processes > Automations	An agent or team gets a scheduling task.

This is the best match for a reminder to set an appointment. Trigger from the disposition that means the lead still needs one.

1. Go to **Processes > Automations** and create a new automation.
2. Trigger: **Dialer Call Events**. Event: **Disposition Set**.
3. Condition: **Call Disposition** is any of the exact recycle outcomes your floor uses, such as Requested Callback or Follow Up Needed.
4. Action: **Create a Task**. Choose the scheduling category and assignee.
5. Set a due date that matches the callback promise, then add a key such as `set-appointment:{{lead.id}}`.

EXAMPLE AUTOMATION

Call ends without an appointment → scheduling task

Use named recycle dispositions. Do not match every result other than Appointment Booked.

The screenshot shows an automation configuration interface with three main sections: 1. Trigger, 2. Conditions, and 3. Action.

- 1 Trigger:**
 - Trigger type: Dialer Call Events
 - Which events?: Disposition Set
- 2 Conditions:**
 - Call Disposition · is any of:
 - No Answer
 - Requested Callback
 - Follow Up Needed
 - Replace these examples with the exact dispositions your floor uses for calls that still need an appointment.
- 3 Action:**
 - Create a Task
 - Task Category: Schedule Appointment
 - Task Name: Set appointment for {{lead.firstName}}
 - Assignee: Event Agent
 - Due Date: +1 day
 - Deduplication Key: set-appointment:{{lead.id}}

Figure 1. Example configuration. Replace the sample dispositions and due date with the agency's rules.

DO NOT USE A BROAD NOT-EQUAL RULE

Call Disposition $\neq$ Appointment Booked also matches sales, transfers, and other valid outcomes. Name only the dispositions that truly need scheduling work.

4. Appointment booked → fulfillment task

USE	START HERE	RESULT
Appointment Types	Agency Settings › Appointment types	Booking creates one task in the mapped category.

Use the native Appointment Type setting when the task should be created at booking time. An Automation or Workflow adds complexity without improving this use case.

1. Go to **Agency Settings › Appointment types**.
2. Create or edit the appointment type.
3. Turn on **Create a task when this type is booked**.
4. Choose the **Task Category** and save changes.

Edit appointment type
×

Basic Information

Name*

AEP Callback

What agents see in the booking picker.

Duration

35 minutes

Time blocked on the calendar when this type is booked.

Fulfillment task

☒ Create a task when this type is booked
Optional. The task lands in the category you pick so the appointment gets worked after the call. Agents never pick the category themselves.

Availability

Minimum notice
Maximum days out

Cancel
Save changes

Figure 2. Fulfillment task is native to Appointment Types. The category is applied automatically when booked.

PICKER BEHAVIOR

With zero or one Appointment Type, agents do not see a type picker. Two or more types make the picker required on every booking path.

5. Appointment booked → confirmation and timed reminders

USE	START HERE	RESULT
Automation + Workflow	Processes > Automations + Workflows	Send confirmation, 24-hour reminder, and 1-hour reminder.

1. Create a Workflow from the **Appointment Reminders** template.
2. Review the booking confirmation and reminder copy. Confirm the sending account and lead phone variable.
3. Create an Automation: **Appointment Events → Appointment Booked or Updated**.
4. Action: **Start Workflow → Appointment Reminders**.
5. Set **Contact Type** to Lead and **Pass full trigger payload** to Yes.
6. Set **Replace an existing appointment run** to Yes. A reschedule then cancels the stale timing and starts the updated run.

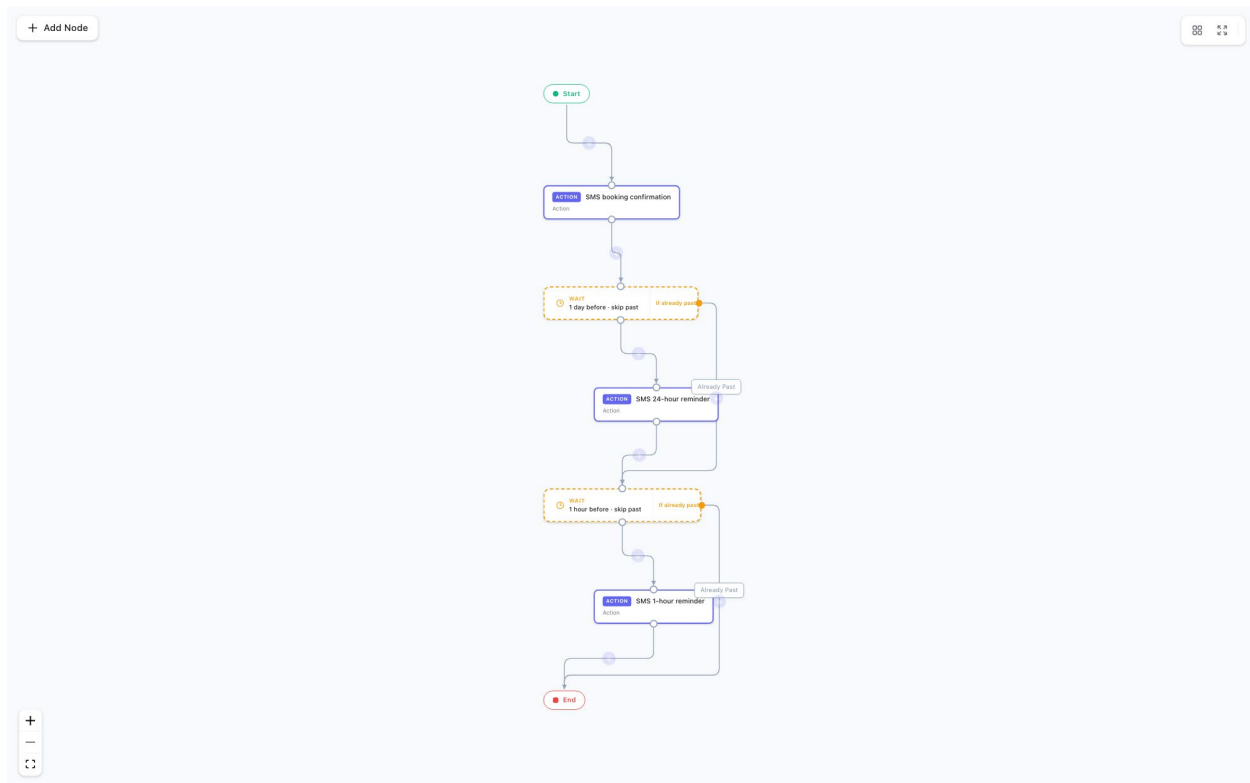


Figure 3. Appointment Reminders template. Past reminder times follow the Already Past path.

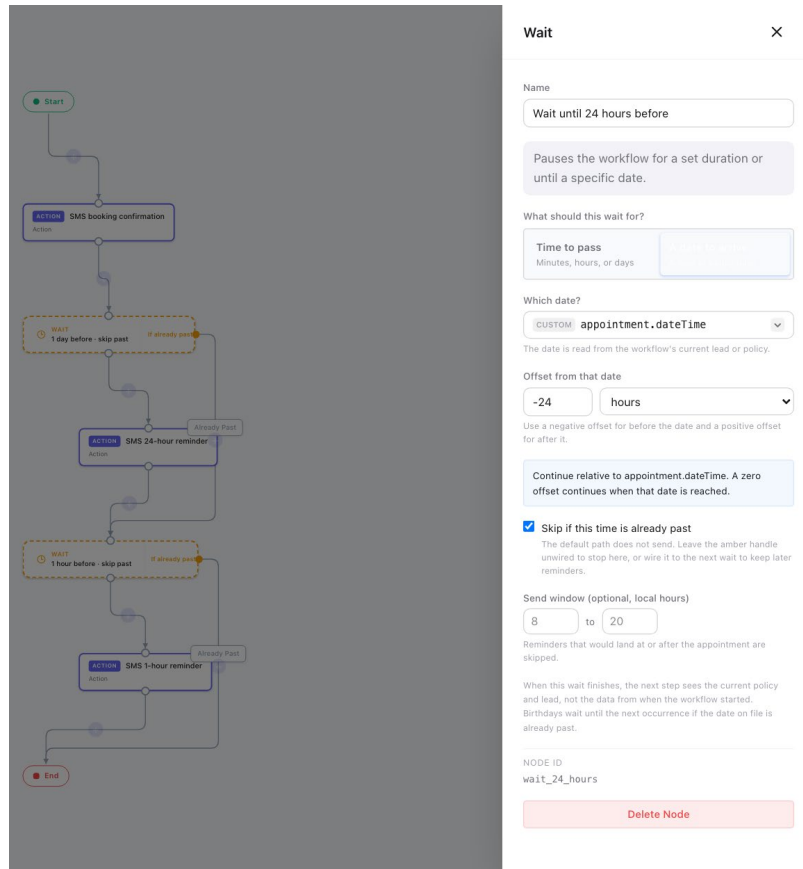


Figure 4. The 24-hour Wait anchors to `appointment.dateTime` and skips when that reminder time is already past.

6. Appointment marked No Show → reschedule follow-up task

USE	START HERE	RESULT
Automation + Workflow	Processes > Automations + Workflows	Text the lead, wait for a reply, then create a reschedule task.

1. Create a Workflow from **Missed Appointment Follow-Up**.
2. Open the **Task** node and choose the category used for rescheduling calls.
3. Create an Automation: **Appointment Events** → **Appointment Booked or Updated**.
4. Conditions: **Changed Fields** includes Appointment Disposition, and **Appointment Disposition** equals No Show.
5. Action: **Start Workflow** → **Missed Appointment Follow-Up**. Pass the full trigger payload.

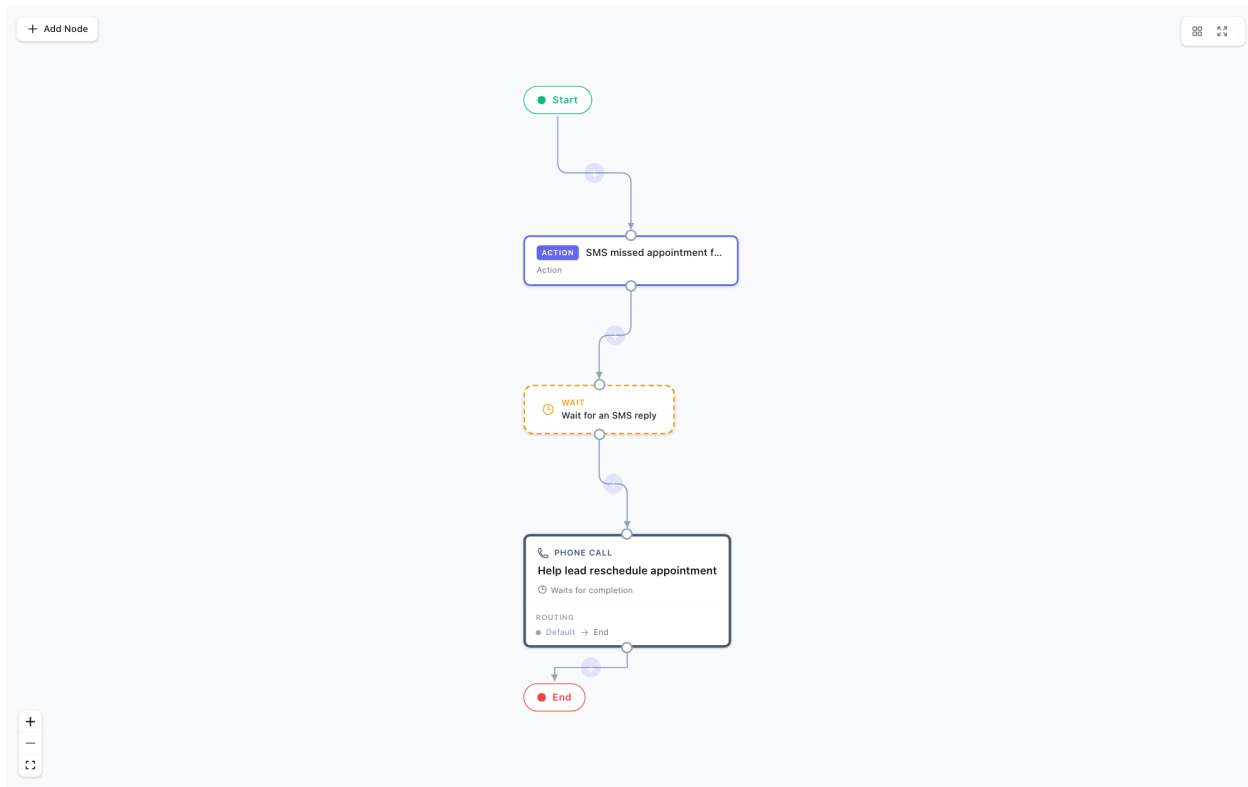


Figure 5. Missed appointment flow: SMS, wait for an SMS reply, then a human task.

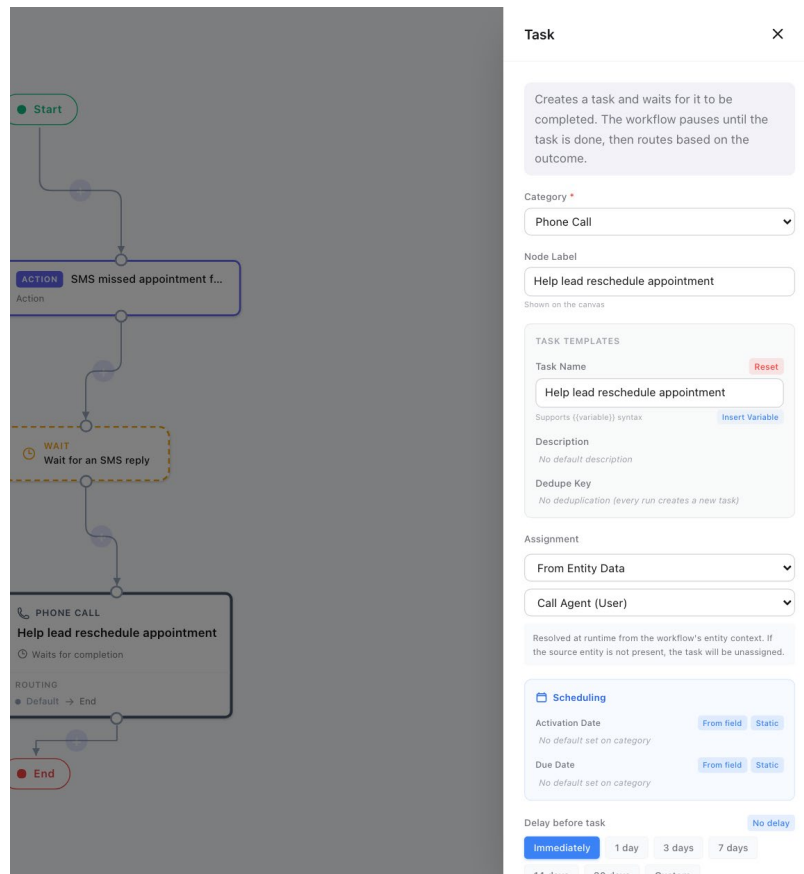


Figure 6. Map the reschedule Task node to a real category and assignment source before saving.

WHY THE TASK WAITS

The template creates the task after the lead replies. If every no-show should create a task immediately, connect the SMS directly to Task and remove Wait for an SMS reply.

7. App Submitted → delayed customer follow-up task

USE	START HERE	RESULT
Automation	Processes > Automations	The selling agent gets a post-enrollment task later.

1. Trigger: **Dialer Call Events** → **Disposition Set**.
2. Condition: **Call Disposition** equals App Submitted.
3. Action: **Create a Task** in the post-enrollment category.
4. Assign to **Selling Agent** when that agent owns the follow-up.
5. Set **Active Date** and **Due Date** to the agency's service standard. The +3 and +4 day values below are examples.
6. Use a stable key such as `post-sale-follow-up:{{lead.id}}` so repeat events do not create duplicate open tasks.

EXAMPLE AUTOMATION

App Submitted → delayed customer follow-up task

The sample timing is editable. Match it to the agency's post-enrollment service standard.

1 Trigger

Trigger type

Dialer Call Events

Which events?

Disposition Set

2 Conditions

Call Disposition · equals

App Submitted

3 Action

Create a Task

Task Category

Post-Enrollment Follow-Up

Task Name

Check in with {{lead.firstName}}

Assignee

Selling Agent

Active Date

+3 days

Due Date

+4 days

Deduplication Key

post-sale-follow-up:{{lead.id}}

Figure 7. Example App Submitted automation. Replace the sample dates with the agency's follow-up promise.

8. Lead disposition changes → assigned task

USE	START HERE	RESULT
Automation	Processes > Automations	A matching lead enters a consistent team follow-up queue.

1. Trigger: **Lead Events** → **Lead Updated**.
2. Condition on **Lead Disposition**, `lead.dialer.result`, or the custom field that is the agency's source of truth.
3. Action: **Create a Task** in the matching follow-up category.
4. Assign to **Event Agent's Team** only when the update carries an agent. Otherwise use a fixed team or category default.
5. Add a lead-based **Deduplication Key**.

EXAMPLE AUTOMATION

Lead disposition changes → team task

Use this when one lead result should always enter a consistent follow-up queue.

```

graph LR
    subgraph 1_Trigger [1 Trigger]
        direction TB
        T1[Trigger type] --> T1_val[Lead Events]
        T2[Which events?] --> T2_val[Lead Updated]
    end
    subgraph 2_Conditions [2 Conditions]
        direction TB
        C1[Lead Disposition - equals] --> C1_val[Follow Up Needed]
        C2[A lead field or custom field can be used instead when that is the source of truth.]
    end
    subgraph 3_Action [3 Action]
        direction TB
        A1[Create a Task]
        A2[Task Category] --> A2_val[Lead Follow-Up]
        A3[Task Name] --> A3_val[Follow up with {{lead.firstName}}]
        A4[Assignee] --> A4_val[Event Agent's Team]
        A5[Due Date] --> A5_val[+1 day]
        A6[Deduplication Key] --> A6_val[lead-follow-up:{{lead.id}}]
    end
    1_Trigger --> 2_Conditions --> 3_Action
  
```

1 Trigger

Trigger type

Lead Events

Which events?

Lead Updated

2 Conditions

Lead Disposition - equals

Follow Up Needed

A lead field or custom field can be used instead when that is the source of truth.

3 Action

Create a Task

Task Category

Lead Follow-Up

Task Name

Follow up with {{lead.firstName}}

Assignee

Event Agent's Team

Due Date

+1 day

Deduplication Key

lead-follow-up:{{lead.id}}

Figure 8. Example Lead Updated automation with team routing and lead-level dedupe.

9. Task becomes overdue → notification or escalation

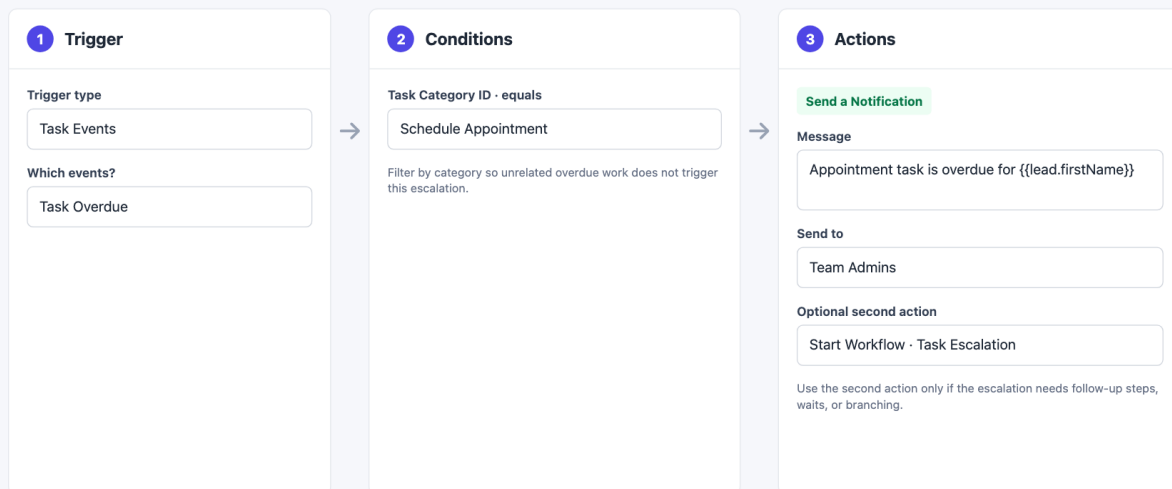
USE	START HERE	RESULT
Automation	Processes > Automations	Alert the team or start a multi-step escalation.

1. Trigger: **Task Events** → **Task Overdue**.
2. Filter by **Task Category ID** so unrelated overdue work does not trigger the same response.
3. Start with **Send a Notification** to the assigned agent or Team Admins.
4. Use **Start Workflow** only when the escalation needs waits, branching, or more than one follow-up action.

EXAMPLE AUTOMATION

Task becomes overdue → notification or escalation

Start with a notification. Use a workflow only when the escalation needs multiple steps or a wait.



Loop guard: a task already attached to a workflow run cannot use its own task event to recursively start another workflow.

Figure 9. Task Overdue can notify admins immediately and optionally start a separate escalation workflow.

LOOP GUARD

A task already attached to a workflow run cannot use its own task event to recursively start another workflow. Keep escalation tasks and source tasks distinct.

10. Task fields that matter

FIELD	WHAT IT CONTROLS
Task Category	Defaults and routing for the work. Required.
Task Name	What the assignee sees. Can include event variables.
Assignee	Policy, selling, servicing, event agent, event agent's team, or configured target.
Active Date	When the task becomes visible and actionable.
Due Date	When the task becomes overdue.
Deduplication Key	Skips creation while a pending or in-progress task with the same resolved key exists.
Pass full trigger payload	Makes appointment, lead, call, task, and agent values available inside a started Workflow.
Replace appointment run	Cancels stale timing and starts a fresh reminder run after a reschedule.

CATEGORY SNAPSHOTS

Choosing a Task Category fills its current defaults into an Automation. Later category edits do not update that Automation. Reopen it if the category rules change.

11. Verification checklist

1. Save the Workflow first, then select it in the Automation.
2. Use one test lead, call, appointment, or task.
3. Confirm the event and conditions match exactly once.
4. Open **Tasks** and verify category, name, assignee, Active Date, Due Date, and dedupe key.
5. For appointment reminders, reschedule the test appointment and confirm the old run is replaced.
6. For overdue escalation, confirm unrelated task categories do not trigger it.
7. Activate for the full agency only after the test result is clean.

12. Troubleshooting

SYMPTOM	CHECK
Too many tasks are created	Narrow the conditions and add a Deduplication Key.
No task is created	Confirm the selected event fired, the category still exists, and all required fields are filled.
Wrong person gets the task	Check Assignee. Event Agent requires an agent on the triggering payload.
Old appointment reminders still send	Set Replace an existing appointment run to Yes.
A reminder time was missed	The Wait node may have followed Already Past because Skip if past is on.
No-show flow never starts	Confirm Appointment Disposition changed and equals No Show.
Overdue task starts no workflow	A task tied to a workflow run is blocked from recursively starting another workflow.
Category defaults changed but automation did not	Reopen the Automation and reselect or update its task fields.

13. Related guides

- **Appointment Types.** Duration, availability, picker behavior, and native fulfillment tasks.
- **IVR Callback.** Press-1 callback tasks from an inbound phone queue.
- **Screeners Transfer Workflows.** Disposition and policy-owner credit after transferred calls close.

Recommended starting recipe: Call disposition set → named recycle disposition → Create a Task to schedule the appointment.