

Fynl.io Automations

With Automations in Fynl.io you pick a trigger, stack the steps, and the follow-up you keep forgetting goes out without you.

WHAT THIS ADDS

Most people keep follow-ups in their head and lose them. In Fynl.io you build a workflow that starts with one event, such as a new enquiry or a paid invoice, and the rest runs by itself: wait, send an email, tag the contact, or notify you. If you would rather not build it yourself, describe it in a sentence and Build with AI drafts it for you.

Where Automations lives

In the Fynl.io portal, open **Automations**. You see your workflows with folders and search. Three buttons sit above the list: **Build with AI**, **Import** and **Create workflow**. The columns show what starts each workflow, how many people are enrolled, and whether it is **Draft** or **Published**.

First: the trigger

Every workflow starts with one event. In the **Workflow trigger** panel, under **When this happens**, pick a trigger and search the list if you need to. Examples: *New enquiry comes in*, *Contact is added*, *Invoice is sent*, *Invoice is paid in full* and *Form is submitted*.

Below it, **Only if (all must match)** holds conditions, such as a tag, that must all be true before the workflow starts.

Then: the steps

Use the + between steps to add one. Some of the step types you can see in the portal:

- **Wait**: for example, wait one hour.
- **Send email**: email the customer.
- **Add tag**: tag the contact.
- **Assign to user**: for example, round-robin across your team.
- **Notify me**: get a heads-up yourself.
- **AI decision**: write a question and the workflow takes the matching branch.

Click any step to open its settings. You can add a note, turn the step off so it is skipped, move it up or down, duplicate it or delete it.

Build with AI

Do not want to build it yourself? Press **Build with AI** and describe the workflow the way you would tell an assistant, for example: when a new customer messages, wait a day, send the pricing email, then remind me three days later. The result lands on the canvas as a **Draft**, and nothing runs until you publish it.

Before you publish: Test

The **Test** button at the top of the builder runs the saved workflow for one contact right now. Waits are skipped, emails go out marked *[Test]*, and the run shows in **Enrollment History** with a TEST label. Because the email is really sent, run the test on yourself. If you have unsaved changes, save first.

Publish and watch it run

The **Draft / Published** switch at the top of the workflow turns it on. After that, the **Enrollment History** tab shows who entered, which step they are on, and whether each run is Active, Finished, Stopped or has an error.

DO THIS

Tonight, build one simple workflow: the trigger "New enquiry comes in", a Wait, and a Send email. Press Test on yourself first, then switch it to Published.

What Fynl.io is

One portal a small business runs itself on, instead of five subscriptions that do not talk to each other.

- A CRM and pipeline that shows every lead and where it stopped
- A calendar clients can book straight into
- Quotes, contracts and invoices, with deposits taken up front
- A website and form builder, so the enquiry lands in the same place
- Your Gmail connected, so the whole thread sits on the contact
- Automations for the follow-up you keep forgetting to send

The AI runs on **your own Claude or ChatGPT API key** — no markup on it. No SMS or phone calls yet. \$49/month per business, \$149 Agency, and we move your contacts over for you.

Automations are connected to your contacts, forms, invoices and inbox in the same Fynl.io portal, so triggers and steps use your own data and nothing has to be copied between tools.