RECIPE DESIGN WORKSHEET

Automation goal

First, decide what you'd like your automation to achieve. What problem are you trying to solve?

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Repetitive tasks

Next, list your repetitive tasks. The more specific, the better.

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Apps

What are some applications and tools you use in this workflow? Where in the apps do you expect the data to appear?

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_____

workato Automation Institute

Map out the automation

Use this framework to map out the basic automation:

When this happens:

_____

"When" is the trigger that kicks off your automation.

Do this:

_____

"This" is the action – what you want your automation to do.

And this:

_____

And this:

_____

And this:

_____

Setting conditions

Sometimes, you might only want certain information to pass through your automation. To do this, you can set IF conditions.

When this happens:

_____

If:

_____

Do this:

_____

And this:

_____

And this:

_____

And this:

_____