

Petro Suits

CASE STUDY

FORMS AND WORKFLOWS



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About Petro Suites

Petro Suites provides ready-to-move-in office spaces and virtual offices across Midland, Texas. Their fully furnished workspaces, conference rooms, and membership plans cater to small businesses and professionals seeking flexibility and speed.



Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque vel velit non dolor dignissim efficitur fringilla sed turpis. Ut luctus ullamcorper vehicula. Etiam molestie risus ac urna ultricies finibus. Vestibulum et nulla vel dui efficitur porta. Integer id dignissim dui, quis condimentum ligula. Ut convallis magna sapien, a tempor velit mollis eget. Aenean imperdiet egestas tempor. Sed vel tincidunt mauris. Nullam at diam dolor. Aenean pharetra massa eu efficitur sagittis.

S.no	Petro Suite Forms
1	Schedule A Tour - PetroSuite
2	PetroSuites Application
3	Free Space
4	Free Trial membership - Petro Suites
5	Petro Suites Business Growth Plan form (Separate page)
6	PetroSuites Business Growth Plan form (Accounting)
7	PetroSuites - NPS Test Form
8	Schedule A Virtual Tour - PetroSuites
9	Newsletter Sign up - PetroSuites
10	Free Trial PetroSuites (Conference room)
11	PetroSuites Business Growth Plan form (Services page)
12	PetroSuites Reference Check Form
13	PetroSuites Temp Survey
14	PetroSuites Business Growth Plan form (Legends Gym)
15	PetroSuites Business Growth Plan form (IT Helpdesk)
16	Virtual Office Virtual Tour - PetroSuites
17	Virtual Office Inquiry - PetroSuites
18	Free Trial PetroSuites (Office for a day)
19	Free Trial PetroSuites (Home page)
20	Director of Operations - PetroSuites Application Form 1
21	Director of Operations - PetroSuites Application Form 1
22	Director of Operations - PetroSuites Application Form 1 O Ga
23	PS Health Insurance Guide (TCTA) (Not in use)
24	PS IT Guide (TCTA) (Not in use)
25	PS Gym InBody Scan (TCTA) (Not in use)
26	PS Accounting Guide (TCTA) (Not in use)
27	PS - Director Application - Form 2
28	PS Referral Form
29	Free Trial membership - PetroSuites (Not in use)
30	Ideal Team Player Self Assessment

Form 1: Schedule A Tour - PetroSuites

This form is used on the PetroSuite website on the following links:

1. <https://www.petrosuites.com/schedule-a-tour-redirect>
2. <https://www.petrosuites.com/schedule-a-tour>

On the submission of this form workflow [1] is triggered (this workflow is supposed to set the contact type as a “PetroSuites” contact by updating the value with “PS Lead Value”). Will create a deal in the PetroSuites pipeline the Pipeline has the following stages:

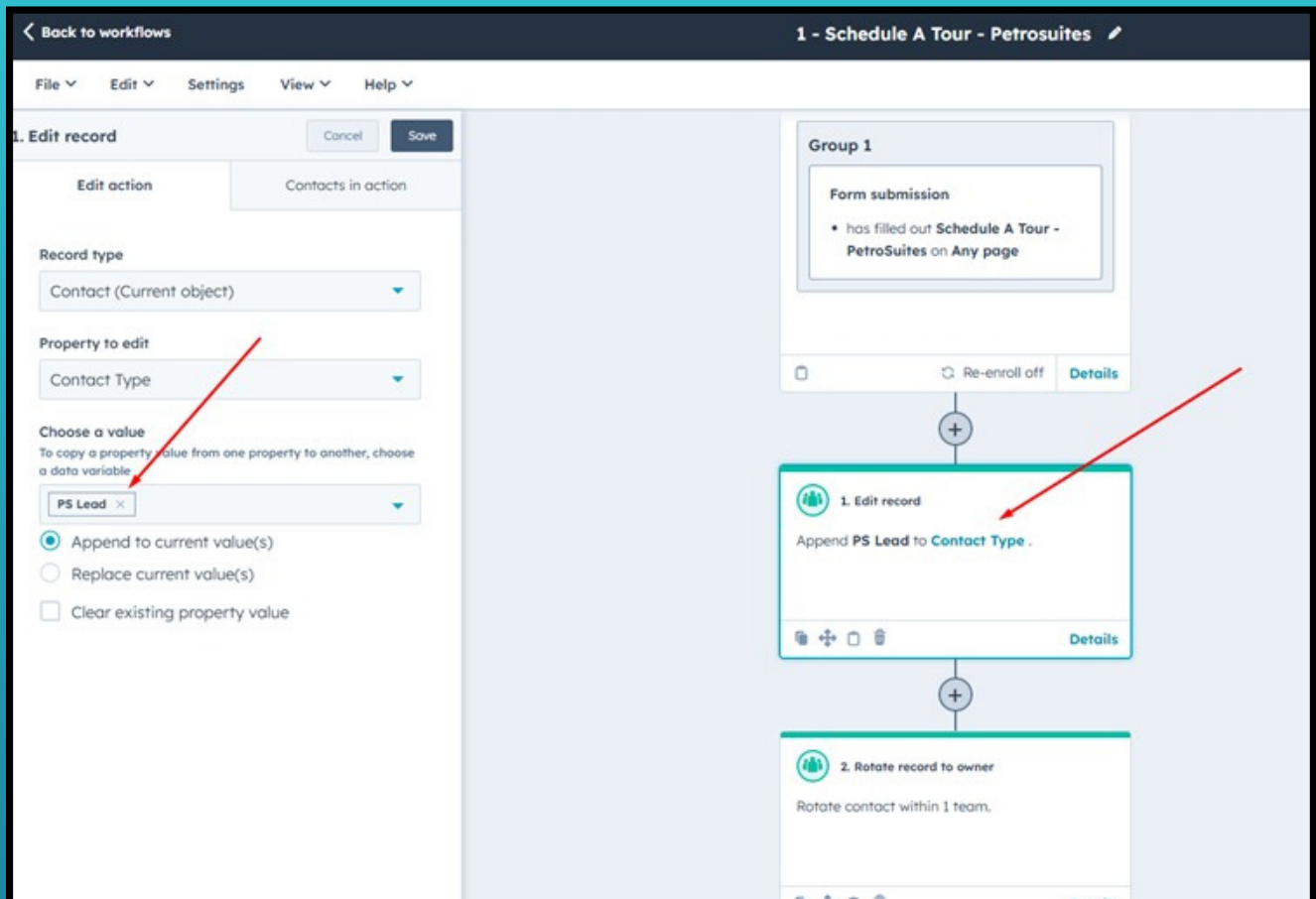
Pipeline Name: PS Member Stages:

- 1) Lead
- 2) Contact Made
- 3) Tour Scheduled
- 4) Tour Completed
- 5) Application Sent
- 6) Application Returned
- 7) References Checked
- 8) Qualified to Buy
- 9) Quote Sent
- 10) First Payment Secured (Closed Won)

- 11) Stalled
- 12) Follow Up
- 13) Follow Up Apex
- 14) Contract Renewed
- 15) Closed Lost

	STAGE NAME	DEAL PROBABILITY	CONDITIONAL STAGE PROPERTIES ⓘ
000001	Lead	15%	
000002	Contact Made	20%	
000003	Tour Scheduled	25%	
000004	Tour Completed	30%	
000005	Application Sent	30%	
000006	Application Returned	70%	
000007	References Checked	80%	
000008	Qualified to Buy	80%	
000009	Quote Sent	90%	
000010	First Payment Secured	Won	
000011	Stalled	50%	
000012	Follow Up	20%	
000013	Follow Up Apex	20%	
000014	Contract Renewed	Won	
000015	Closed Lost	Lost	

Schedule A Tour - Petrosuites workflow:



Assign an owner from the ("PS Contact Owner") team and initiate a sequence. In this sequence, an email with a meeting link and an explanation would be sent to the contact.

After completing this process, create a deal in the "PS Member Pipeline" with the contact's name, set it to the "Lead" stage, and also associate the contact with the deal. Lastly, Create a task "Review New Tour Deal" to assign the owner.

The image displays a CRM workflow configuration interface, split into two main sections: a configuration panel on the left and a workflow diagram on the right.

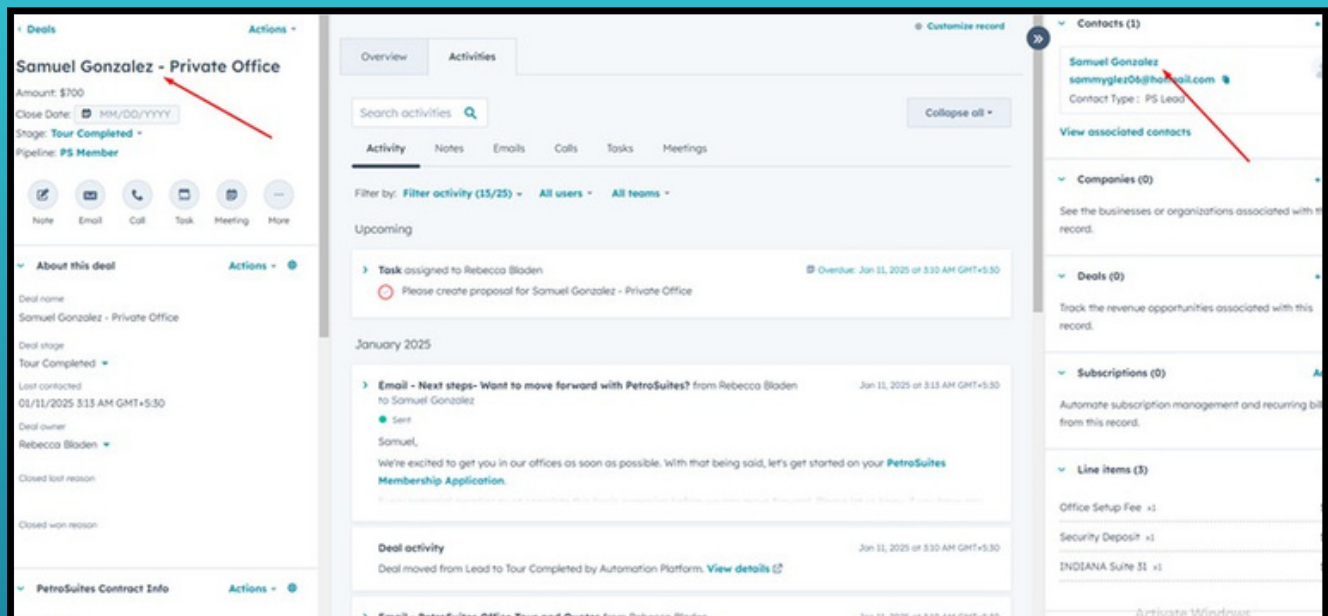
Left Panel: Configuration for '4. Create record'

- Header:** '4. Create record' with 'Cancel' and 'Save' buttons.
- Tab:** 'Edit action' is selected, with 'Contacts in action' as an alternative.
- Type of record to create:** A dropdown menu set to 'Deal'.
- Assign deal to:** A dropdown menu set to 'An existing owner of the contact'.
- Which contact owner:** A dropdown menu set to 'Contact owner'.
- Deal Name *:** A text input field containing 'First Name' and 'Last Name' separated by a hyphen, with a 'PS Deal Type' tag below it. A red arrow points to this field.
- Deal pipeline and stage *:** A dropdown menu set to 'Lead (PS Member)'.
- Buttons:** 'Add more properties'.
- Associate new deal with:** A section titled 'The contact enrolled in this workflow' with a dropdown menu set to 'No label'.

Right Panel: Workflow Diagram

- The diagram shows a sequence of three steps connected by plus signs in circles.
- Step 3:** '3. Enroll in a sequence' with the description 'Enroll contact in Schedule A Tour - PetroSuites as Contact owner'.
- Step 4:** '4. Create record' (highlighted with a red arrow). The description is 'Create deal First Name Last Name - PS Deal Type and assign to Contact owner.' It includes a 'Details' link.
- Step 5:** '5. Create task' with the description 'Create task Review New Tour Deal and assign to Contact owner.' It also includes a 'Details' link.

Associate contact with the deal in the below Image



This workflow [2] would be triggered once a user replies to an email sent in the previous workflow [1]. Upon triggering, update the deal stage from "Lead" to "Contact Made."

Workflow 2: PS Member Pipeline automation | Move Deal Made to Contact

Enrollment triggers Cancel Save

Enrollment Unenrollment Re-enrollment

Generate a trigger with AI BETA

Test contact Discard Done

Group 1

Contact is associated to:
Any Deal

And associated Deal has all of:

Deal stage is any of **Lead (PS Member)**

+ Add criteria

AND

Contact is associated to:
Any Activity

And associated Activity has all of:

Number of Email Replies is greater than **0**

+ Add criteria

AND

+ Add criteria

Select a filter to start editing

Trigger enrollment for contacts

enroll records that meet these conditions

Group 1

Contact is associated to:
Any Deal

And associated Deal has all of:

Deal stage is any of **Lead (PS Member)**

Re-enroll off Details

1. Edit record

Deal pipeline and stage on associated is to **Contact Made (PS Member)**.

Details

1. End

```
graph TD; subgraph Triggers; T1[Group 1: Contact is associated to Any Deal AND Deal stage is any of Lead (PS Member)]; T2[AND: Contact is associated to Any Activity AND Number of Email Replies is greater than 0]; end; subgraph Workflow; W1[1. Edit record: Deal pipeline and stage on associated is to Contact Made (PS Member)]; W2[1. End]; end;
```

Once the deal owner adds Tour Date in the tour information workflow[3] will be triggered.

The screenshot displays a contract management interface with the following sections:

- Contract Details:**
 - 12 Mo ▾
 - Contract Start date: 01/13/2025
 - Start Day: 13th ▾
 - Start Month: January ▾
 - Contract Start Year: 2025 ▾
 - Contract Renewal Date: 01/13/2026
- Renewal Information:**
 - Renewal Status
 - Renewal Contract Counter
 - Renewal Counter
- Tour Information:**
 - Tour Completed: 12/30/2024
 - Tour Scheduled: 12/30/2024

A red arrow points to the "Tour Scheduled" date field (12/30/2024).

Workflow3:PS | Move Deal to Tour Scheduled

The screenshot shows a workflow configuration interface for 'Group 1'. At the top, there are three buttons: 'Test contact', 'Discard', and 'Done'. The main area is divided into three sections, each with a trash icon in the top right corner.

- Group 1**
 - Contact is associated to:
Any Deal
 - And associated Deal has all of:
Pipeline is any of PS Member
 - + Add criteria
- AND**
 - Contact is associated to:
Any Deal
 - And associated Deal has all of:
Tour Scheduled is known
 - + Add criteria
- AND**
 - + Add criteria

In this workflow, if the user books a meeting with the owner using the link sent in the first workflow [1], then the owner confirms the meeting and updates the deal property **Tour schedule**

Then triggered the workflow and the deal goes to **Contact Made to Tour Scheduled Stage**.

When the Deal Owner completes the tour Workflow [4] will be triggered.

The screenshot displays a CRM interface with a sidebar on the left and a main content area on the right. The sidebar contains various icons for navigation. The main content area is divided into two sections: 'Deals' and 'Activities'.

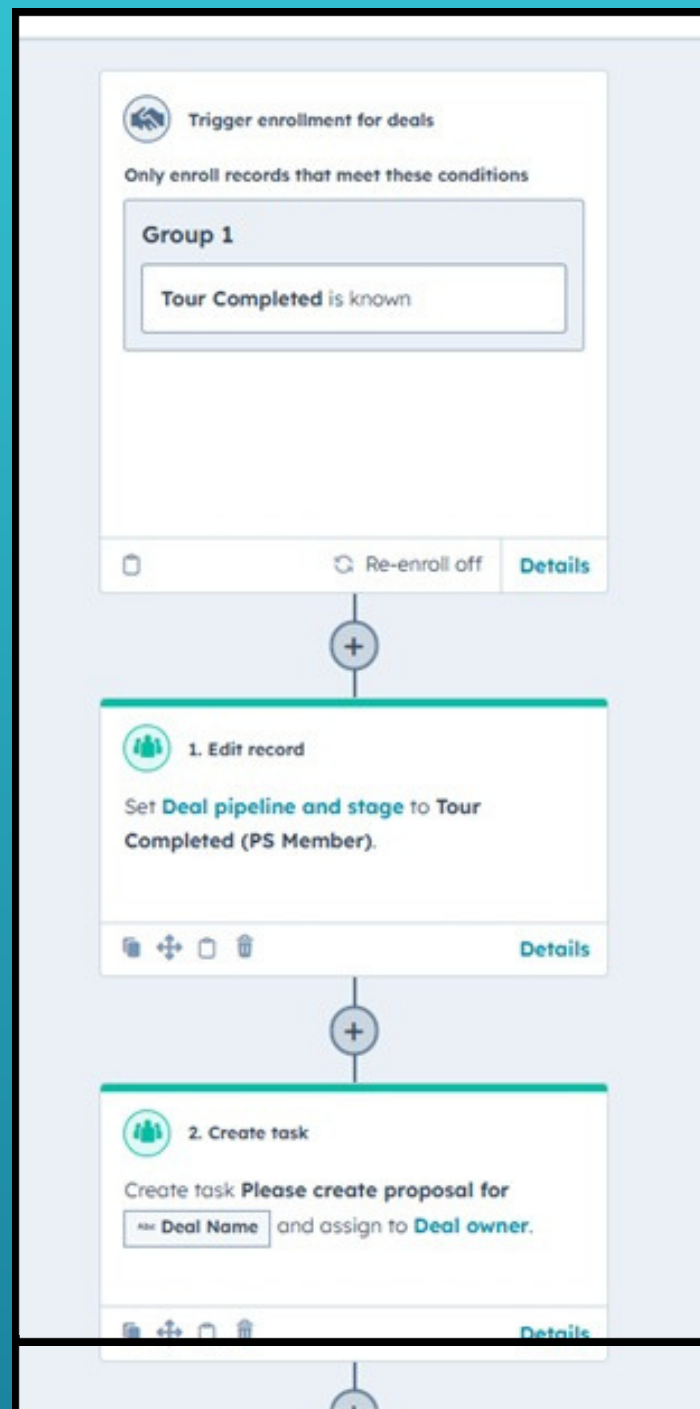
Deals Section:

- Deal Title:** \$700 Samuel Gonzalez - Private Office
- Contract Start Year:** 2025
- Contract Renewal Date:** 01/10/2026
- Tour Information:**
 - Tour Scheduled: 01/10/2025
 - Tour Completed: 01/10/2025 (highlighted with a red arrow)
- Renewal Information:**
 - Renewal Status
 - Renewal Contract Counter
 - Renewal Counter
- Tour Information (repeated):**
 - Tour Completed: 01/10/2025
 - Tour Scheduled: 01/10/2025

Activities Section:

- Overview** | **Activities**
- Search activities** (with a magnifying glass icon)
- Activity** | **Notes** | **Emails**
- Filter by:** Filter activity (15/25)
- Upcoming**
- Task assigned to Rebecca Bladen**
 - Please create proposal for Samuel
- January 2025**
- Email - Next steps- Want to move to Samuel Gonzalez**
 - Opens: 1 Clicks: 0
 - Samuel,
 - You would probably like to get into pass our basic screening. **Fill out o**
 - Forms and applications are tedious
- Email - Next steps- Want to move to Samuel Gonzalez**
 - Sent
 - Samuel,
 - We know you're probably busy putt
 - move into one of our offices.

Workflow 4: PS | Move Deal to Tour Completed When the Deal Owner completes the tour, the deal stage should update from "Tour Scheduled" to "Tour Completed," and a task should be created for the owner with the name "Please create a proposal following the tour."



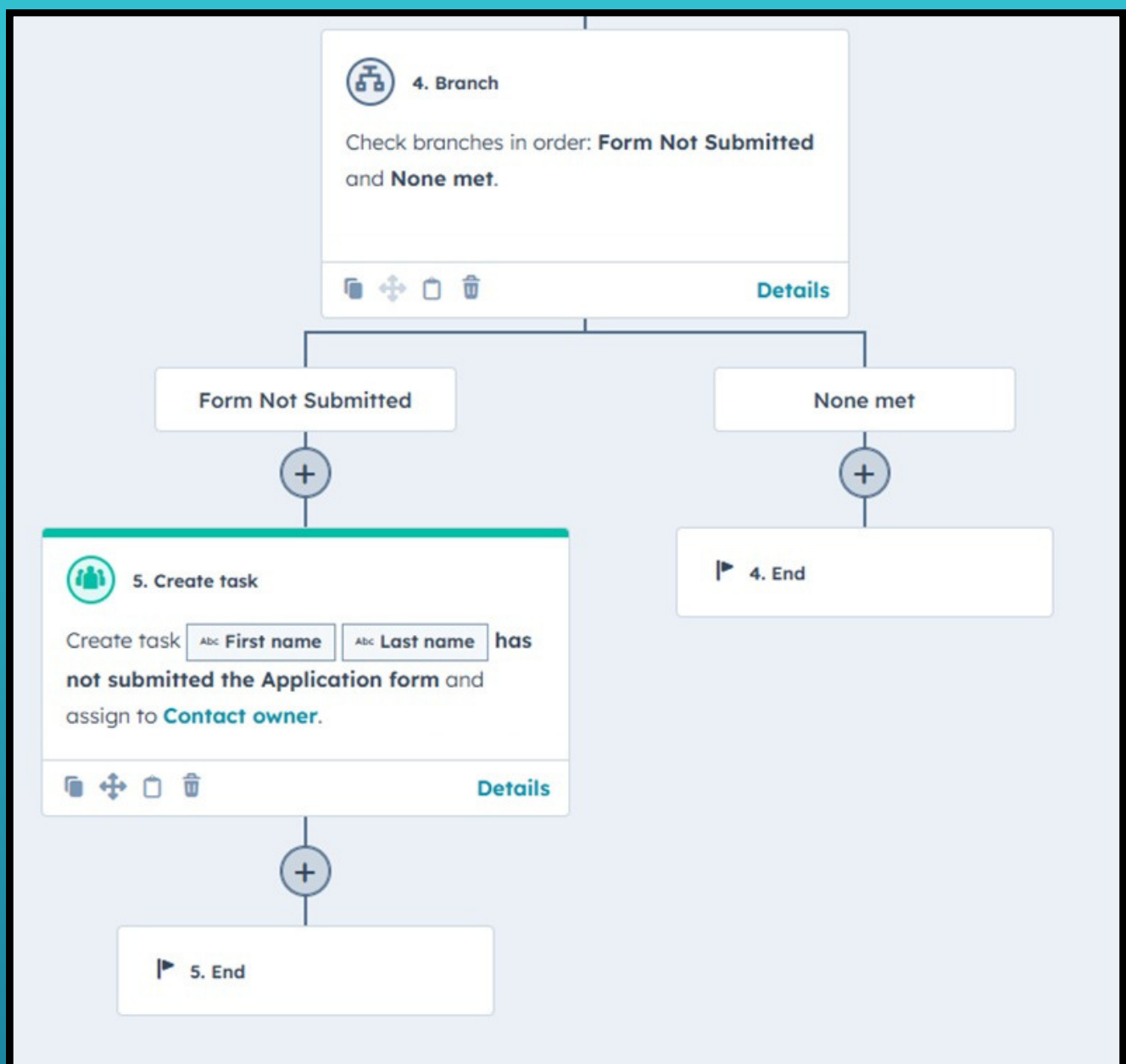
After Tour Completion send an application form to contact in the next workflow [5]

Workflow 5: PS | Send Application Email

The screenshot displays a workflow builder interface. At the top, there are buttons for 'Test Contact', 'Disable', and 'Done'. Below these, a section titled 'Group 1' contains a list of criteria. The first criterion is 'Contact Type is any of PS Lead, PS Member, or PS Contract Signer'. This is followed by an 'AND' connector. The second criterion is 'Contact is associated to: Any Deal'. Below this, it states 'And associated Deal has all of: Deal stage is any of Tour Completed (PS Member)'. There is a '+ Add criteria' button below the second criterion. At the bottom, there is another 'AND' connector with a '+ Add criteria' button below it.

If the "Contact Type" property of a contact matches any of these three types, a sequence (An email is sent as part of the sequence, which includes a form.) is triggered and sent to the contact again.

A 7-day delay has been added after sending the email containing the Application Form to the contact. If the form is not submitted within this period, a task is created and assigned to the owner. After the email is sent, the owner manually updates the deal stage to "Application Sent."



Form No: 2 => PetroSuites Application Form

This Form is used in the Below Workflows

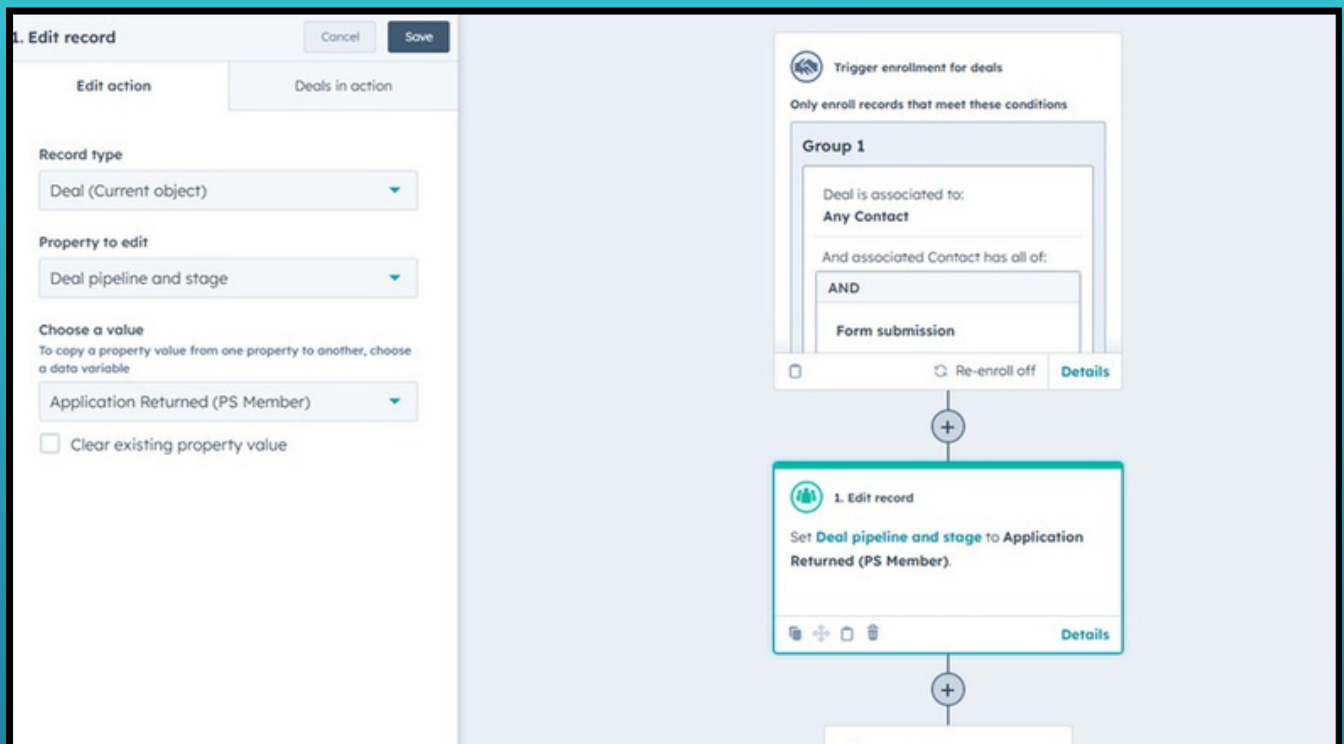
5 - PS | Send Application Email [5] 6 - PS | Move Deal to Application Returned [6] 7 - PS | Create and Associate Reference Contacts after Form Submission [7] Sequence 101290872 automation - Wed Jul 17 2024 19:12:54 GMT+0200 PS | Move Deal to Application Returned

Workflow 6: 6 - PS | Move Deal to Application Returned

The screenshot displays a workflow builder interface with the following structure:

- Buttons:** Test deal, Discard, Done.
- Group 1:**
 - Deal is associated to:** Any Contact
 - And associated Contact has all of:**
 - AND:**
 - Form submission:**
 - has filled out **PetroSuites Application** on Any page
 - + Add criteria
 - + Add criteria
 - AND:**
 - + Add criteria
 - OR:**
 - + Add criteria

When the associated contact with the deal completes the form, the DealStage is updated from "Application Sent" to "Application Returned."



After filling out the form [2] then trigger the workflow.

Workflow 7: 7 - PS | Create and Associate Reference Contacts after Form Submission

In this workflow, we have used Two Forms

The screenshot displays a workflow builder interface with two groups of criteria, Group 1 and Group 2, connected by an OR operator. At the top, there are three buttons: "Test contact", "Discard", and "Done".

Group 1

- Form submission
 - has filled out **PetroSuites Application** on Any page
 - + Add criteria
- AND
 - + Add criteria

OR

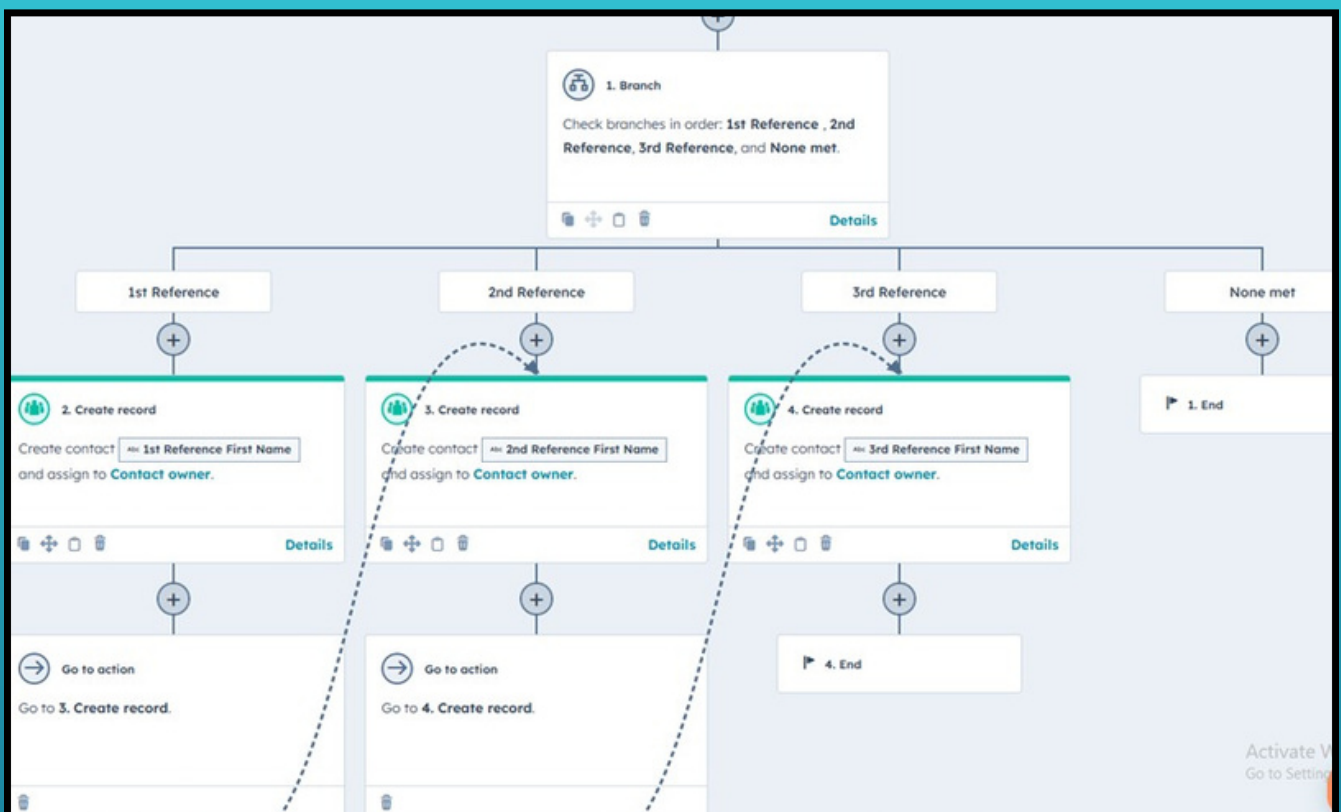
Group 2

- Form submission
 - has filled out **Free Space** on Any page
 - + Add criteria
- AND
 - + Add criteria

1. Petrosuite Application

2. Free Space

When the user fills out the forms, a contact is created based on the reference properties.



Please see the below screenshot for contact creation and assigning values

2. Create record Cancel Save

Contact ▼

Caution
Creating contacts in contact-based workflows can trigger an infinite loop. Make sure the contact you create doesn't meet the trigger criteria for this workflow.

Email *

Abc 1st Reference Email ⓘ

First Name

Abc 1st Reference First Name ⓘ

Last Name

Abc 1st Reference Last Name ⓘ

Street Address

Abc 1st Reference Address ⓘ

Contact Type

PS Reference #1 × ▼

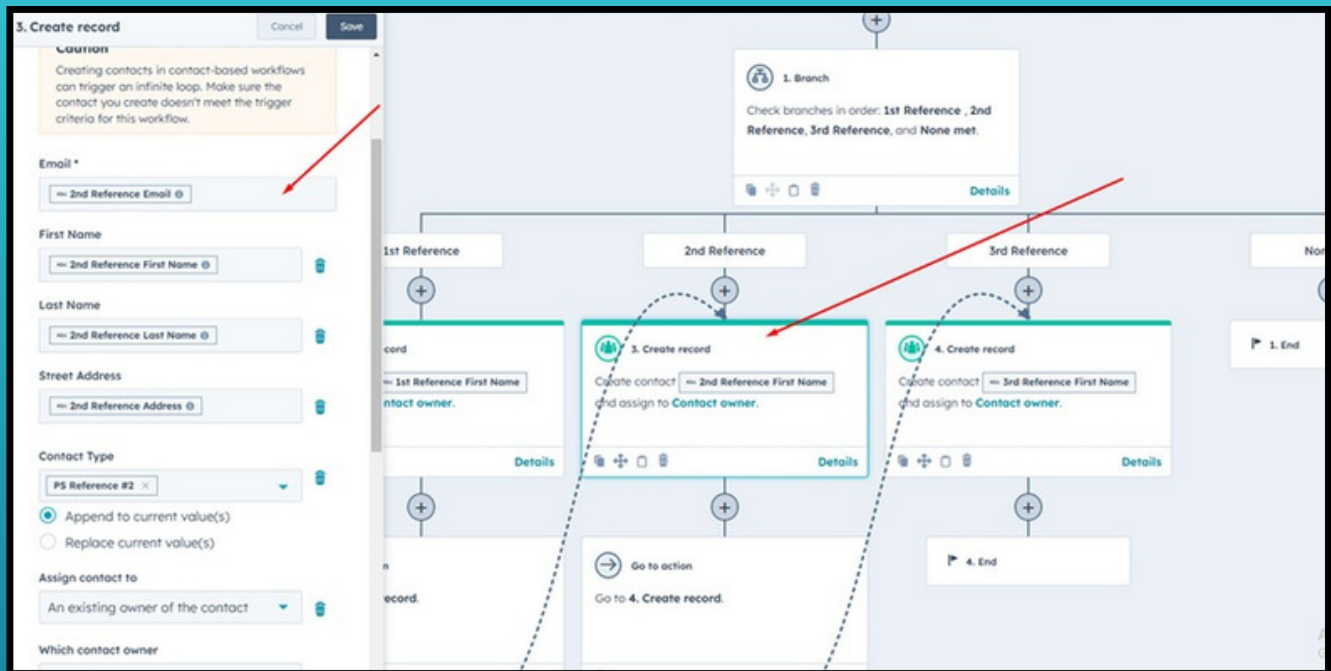
☒ Append to current value(s)
☐ Replace current value(s)

Assign contact to

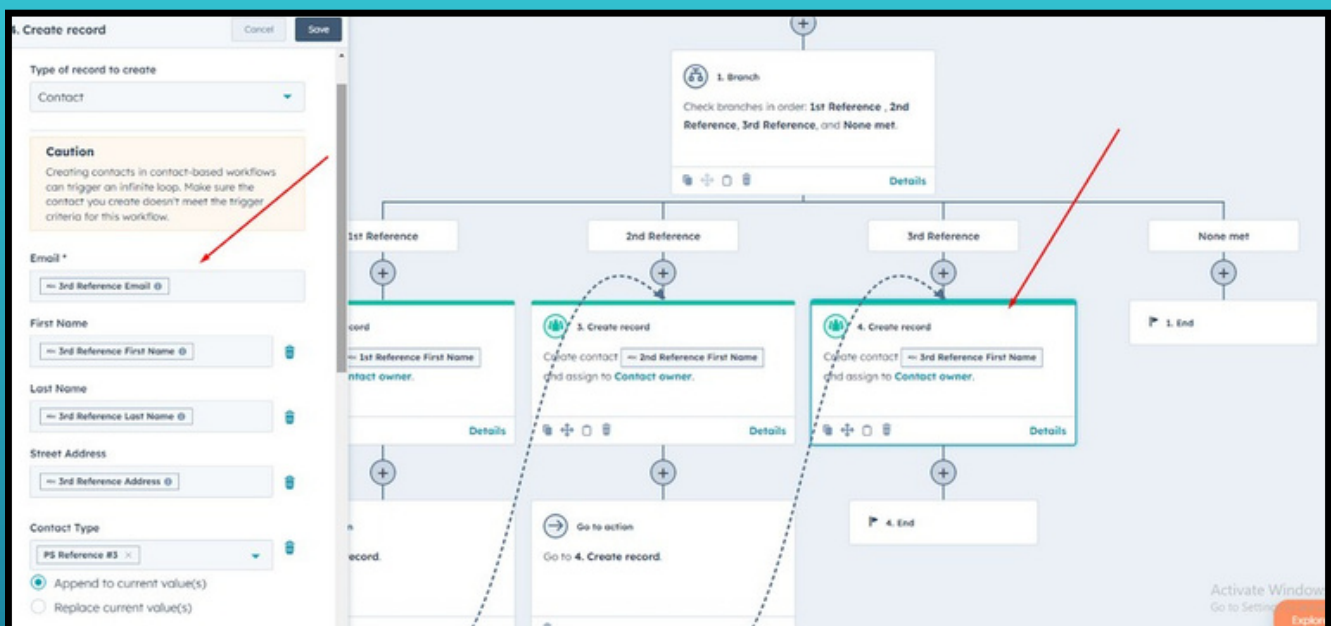
An existing owner of the contact ▼

The reference email is assigned to the contact's email, the reference first name is assigned to the contact's first name, the reference last name is assigned to the contact's last name, and the reference address is assigned to the contact's street address.

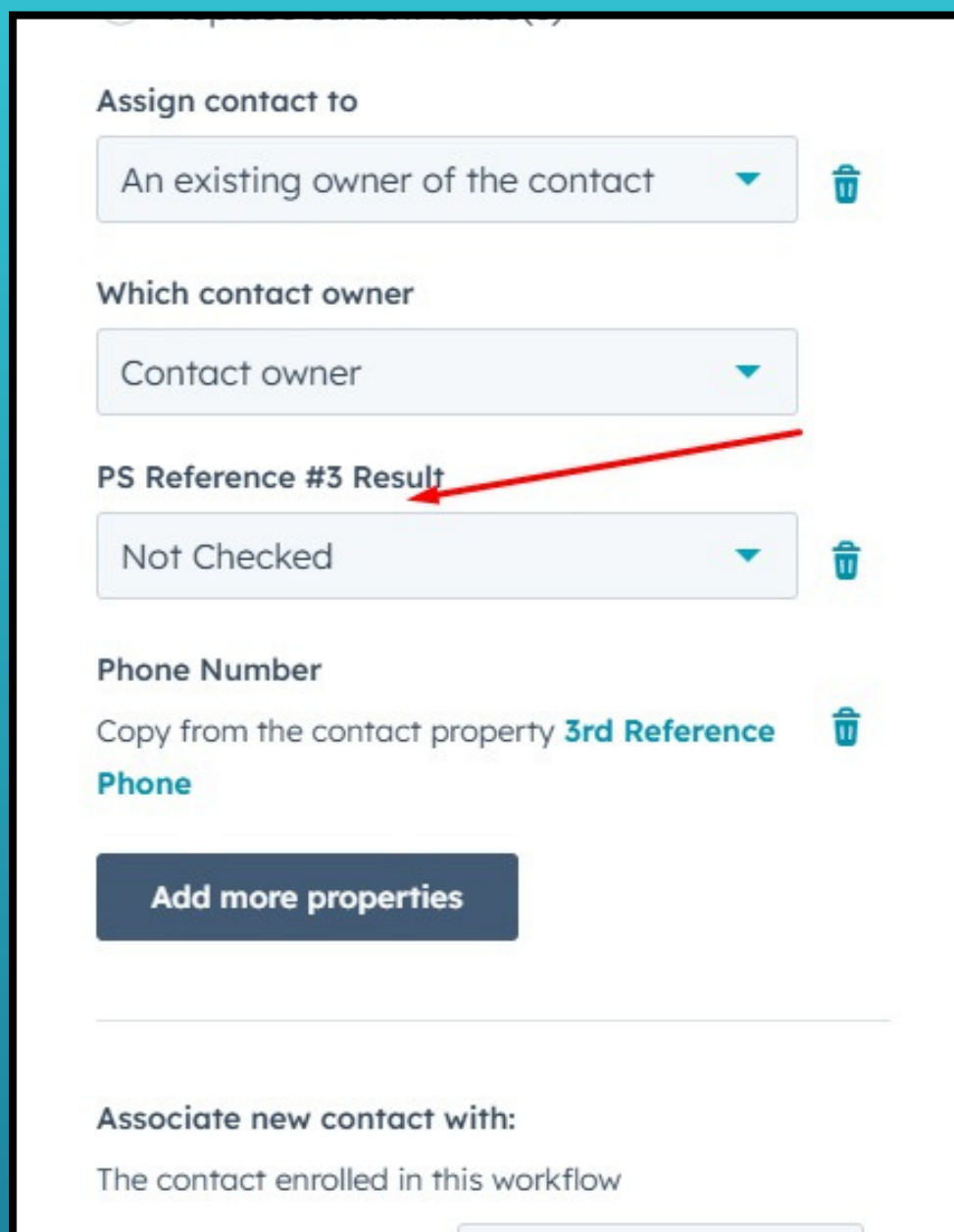
For the 2nd Reference Value please check the below Screenshot



For the 3rd Reference Value please check the below Screenshot



These contacts are also associated with the enrolled contacts in the previous workflows. The "Set PS Reference Result" is not checked for any of the three references. After this process, the owner reviews the contact and updates the reference property to indicate whether the reference process passed or failed.



The screenshot displays a user interface for assigning contact properties. It features several dropdown menus and a button, all within a light gray container. A red arrow points to the 'PS Reference #3 Result' dropdown, which is currently set to 'Not Checked'. Below this, there is a section for 'Phone Number' with a link to '3rd Reference Phone'. At the bottom, there is a button labeled 'Add more properties' and a section for associating the new contact with an existing workflow.

Assign contact to

An existing owner of the contact ▼

Which contact owner

Contact owner ▼

PS Reference #3 Result

Not Checked ▼

Phone Number

Copy from the contact property [3rd Reference Phone](#)

[Add more properties](#)

Associate new contact with:

The contact enrolled in this workflow

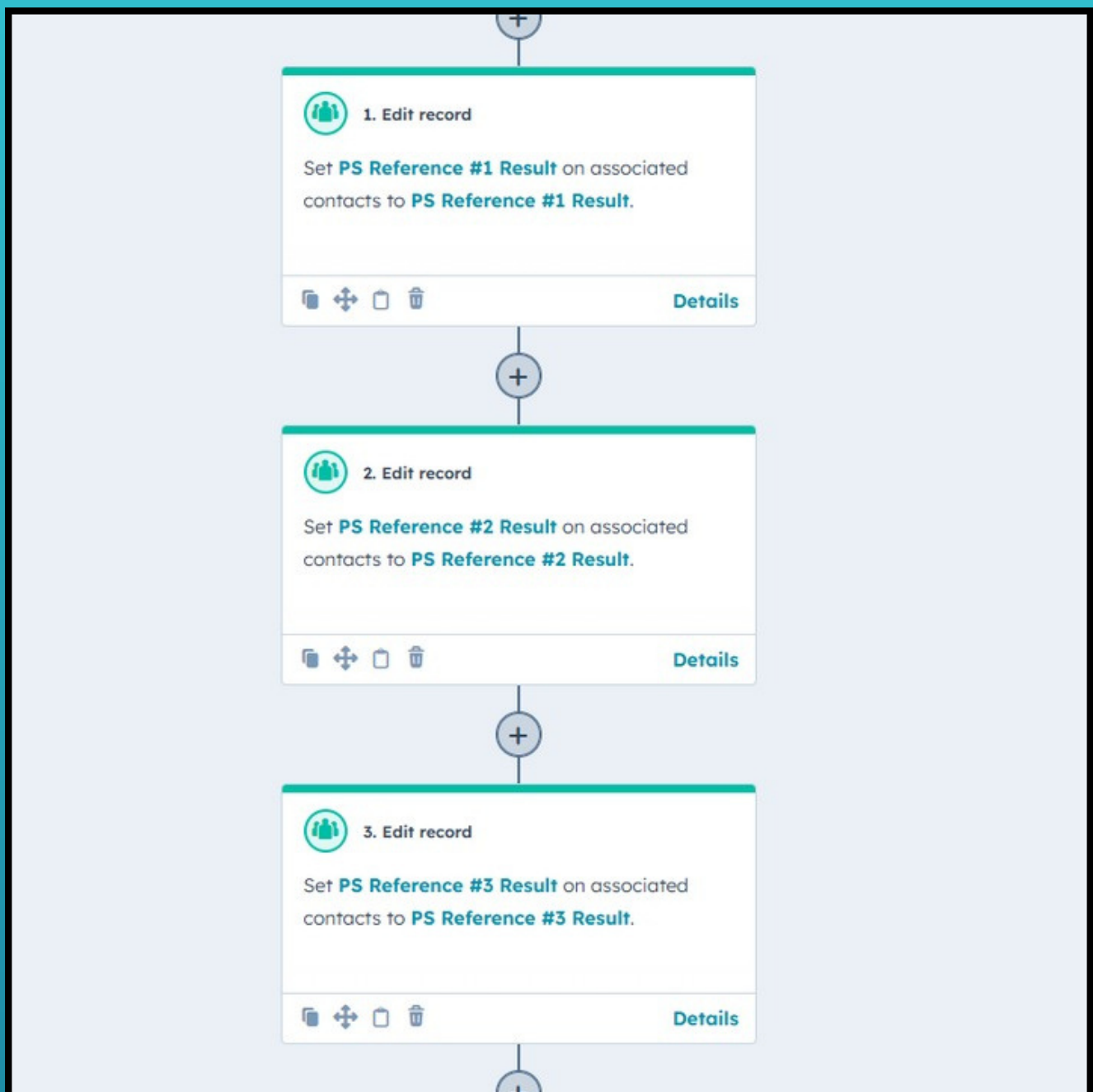
Workflow 8: PS | Reference Approval Copy to Applicant

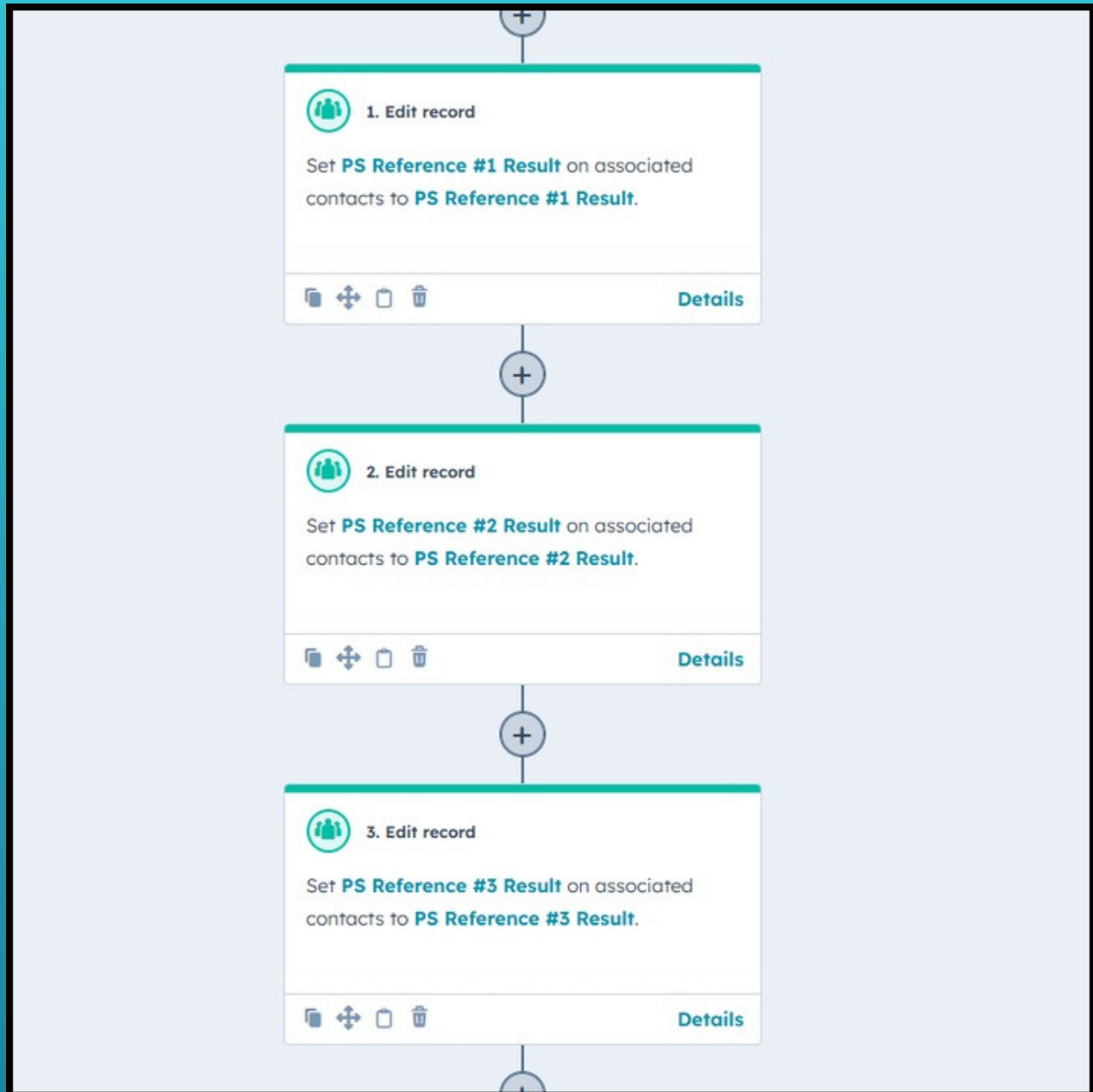
This workflow is triggered when the owner updates the reference property, and it depends on the completion of the previous workflow.

The screenshot displays a workflow configuration interface with three groups of criteria, each connected by an 'OR' operator. Each group contains a single criterion with a trash icon for deletion.

- Group 1:** PS Reference #1 Result is any of Pass or Fail. Below the criterion is an 'AND' section with a '+ Add criteria' button.
- OR**
- Group 2:** PS Reference #2 Result is any of Pass or Fail. Below the criterion is an 'AND' section with a '+ Add criteria' button.
- OR**
- Group 3:** PS Reference #3 Result is any of Pass or Fail. Below the criterion is an 'AND' section with a '+ Add criteria' button.

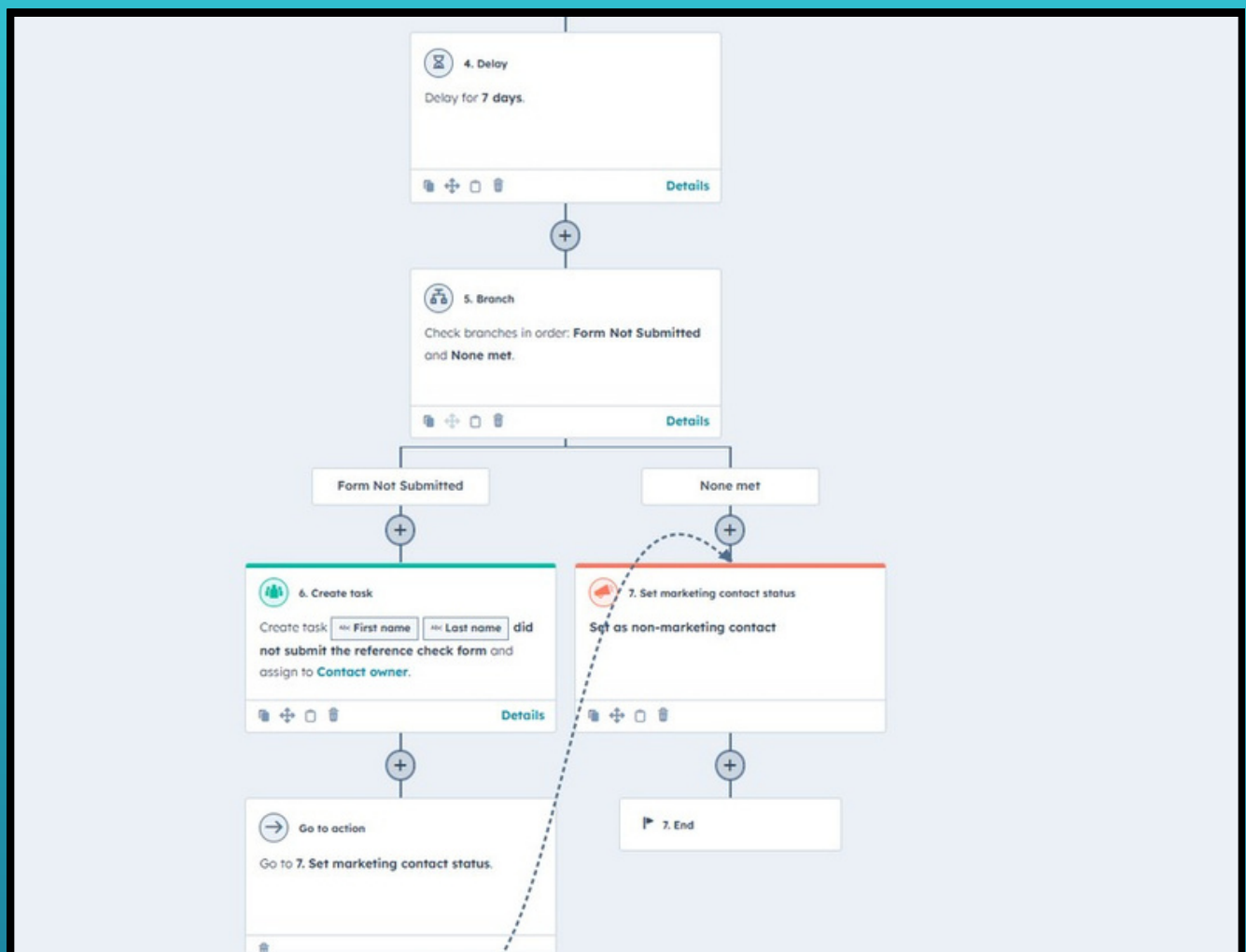
This workflow is triggered when the owner updates the reference property, and it depends on the completion of the previous workflow.



Workflow 9: PS | Send Reference Check Questions

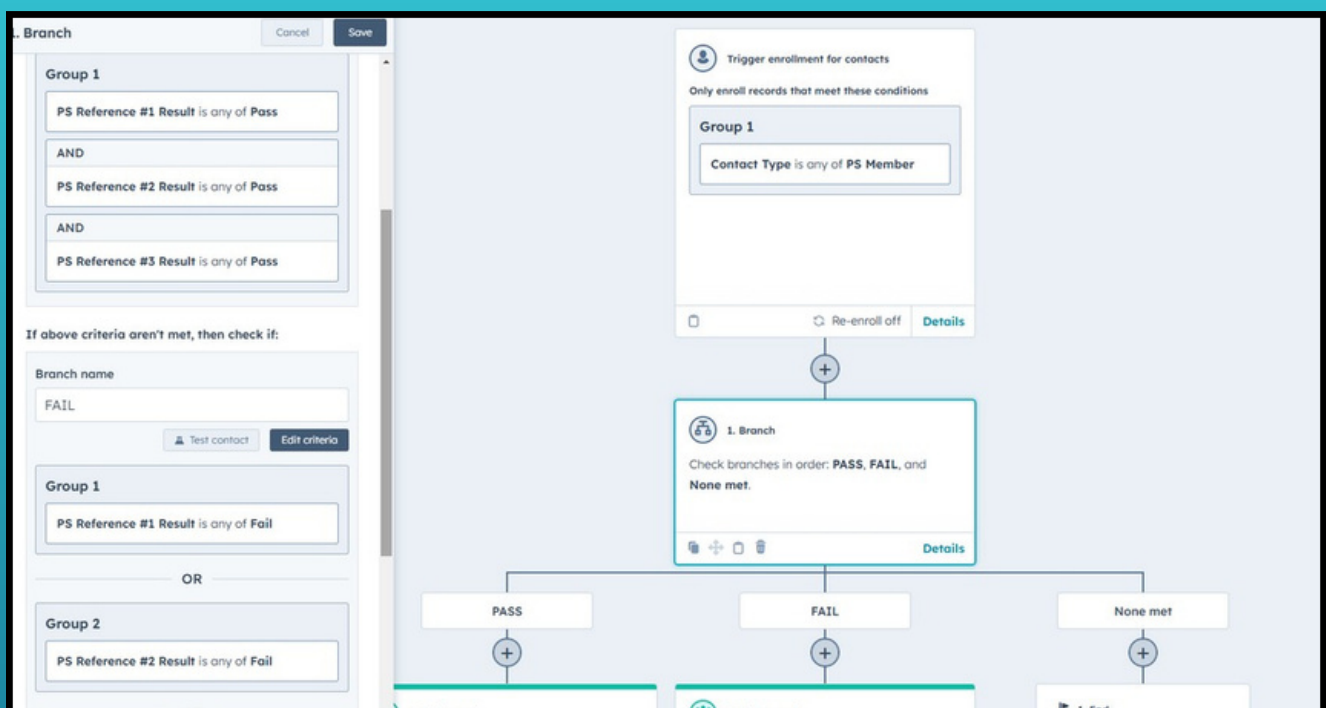
After a 15-minute delay, the sequence (Reference Check - PetroSuites) sends reference check questions from Bennita Clark to contacts listed as "PS Reference #1," "PS Reference #2," or "PS Reference #3." Before sending the sequence (Reference Check - PetroSuites), the contact is set as a marketing contact, and the email, including the form (PetrosSuites Reference Check Form), is sent to the contact in the form there are some questions regarding the reference based on those questions owner decide the Reference Result pass or Fail.

After sending the email, a 7-day delay is added to check if the form (PetrosSuites Reference Check Form) is submitted. If the contact submits the form, they are set as a non-marketing contact. If the form is not submitted, a task is created and assigned to the owner, and the contact is then set as a non-marketing contact.



Workflow 10: PS I Reference Approval

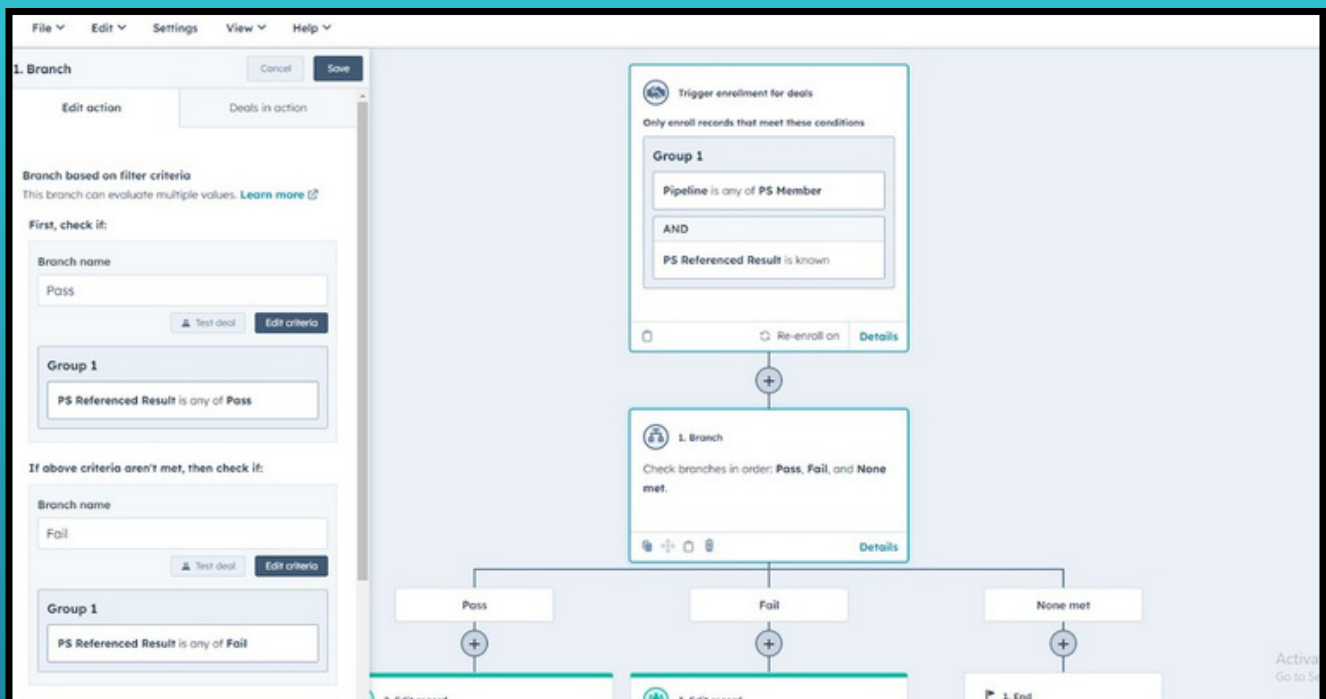
Owner Updates the "PS Referenced Result" to "Pass" or "Fail" based on feedback received from the reference checks form. This workflow determines if the deal is ready to move to the "Qualified to Buy" stage.



If all the "PS Reference Results" properties are marked as "pass," the contact is enrolled in a sequence (Reference Pass - PetroSuites). If any one of the properties is marked as "fail," the contact is directed to the failed condition and enrolled in the sequence (Reference Fail - PetroSuites) for failed "PS Reference Results."

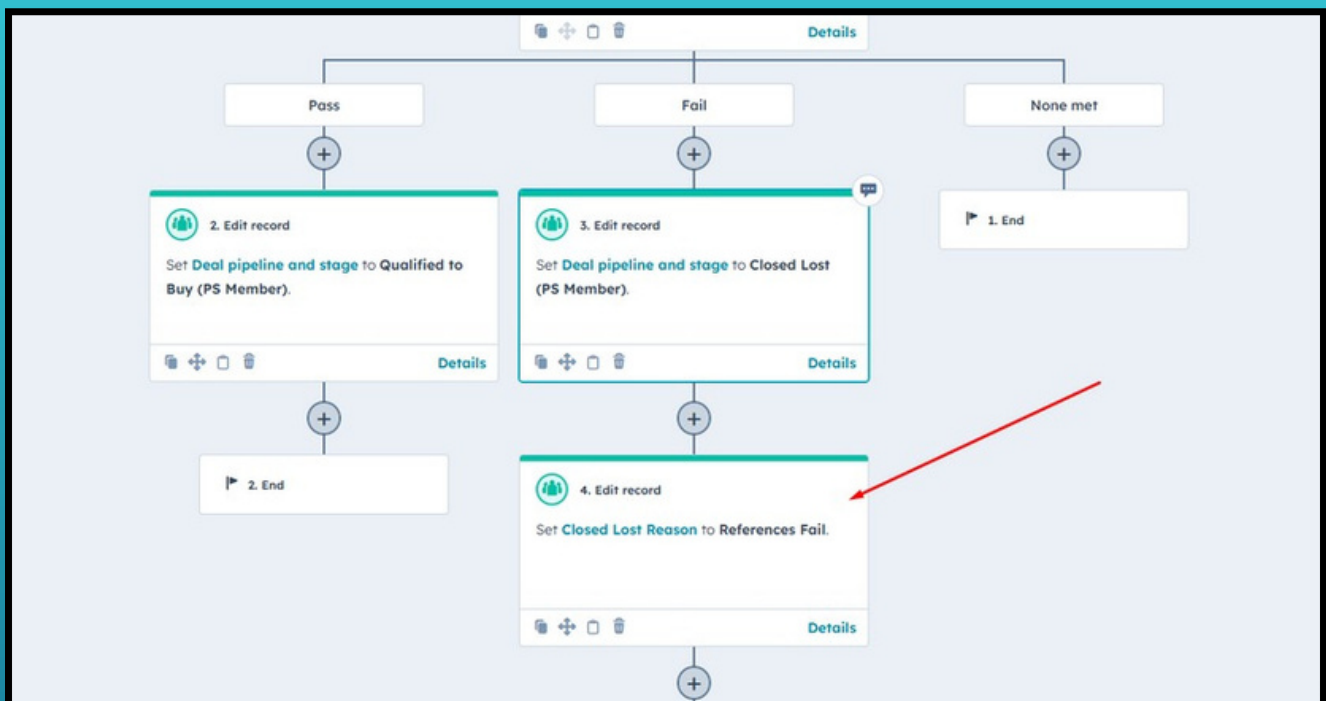
Workflow 11: PS | Move Deal to Qualified to Buy / Lost

Update the "Deal Stage" to "Qualified to Buy" if the "PS Reference Result" is marked as "Pass." Otherwise, set the stage to "Closed Lost" if the result is marked as "Fail," indicating that the reference checks did not meet the required criteria.



Workflow 12: PS | Move Deal to Qualified to Buy / Lost

The "Deal Stage" is updated to "Qualified to Buy" if the "PS Reference Result" is marked as "Pass." Alternatively, it is set to "Closed Lost" if the result is marked as "Fail." then update the property closed lost Reason to References Fail.



Form Name: Free Trial membership - PetroSuites

Not utilized anywhere.

Form Name: PetroSuites Business Growth Plan form (Separate page).

This form is used on a website page (<https://www.petrosuites.com/petrosuites-business-growth-plan-form>) and in a workflow (PetroSuites Services Inquiry Workflow).

Upon form submission, contact and a deal are created in the Lead stage of the PS Member pipeline and assigned to Rebecca Bladen. But the workflow is off.

The screenshot displays the 'PetroSuites Services Inquiry Workflow' configuration page. The interface is divided into a left sidebar for configuration and a main area for the workflow logic.

Left Sidebar (Configuration):

- Create record:** Includes a 'Save' button and a 'Cancel' button.
- Edit action:** A tab for editing the current action.
- Contacts in action:** A section for managing contacts.
- Type of record to create:** A dropdown menu set to 'Deal'.
- Assign deal to:** A dropdown menu set to 'Specific user'.
- Which user:** A dropdown menu set to 'Rebecca Bladen'.
- Deal Name *:** A field with a dropdown menu set to 'PetroSuites Business Services'.
- Deal pipeline and stage *:** A dropdown menu set to 'Lead (PS Member)'.
- Close Date:** A section with radio buttons for 'Calendar date' and 'Days after action running' (selected). A value of '14' is entered in the 'Days' field.
- Add more properties:** A button at the bottom.

Main Area (Workflow Logic):

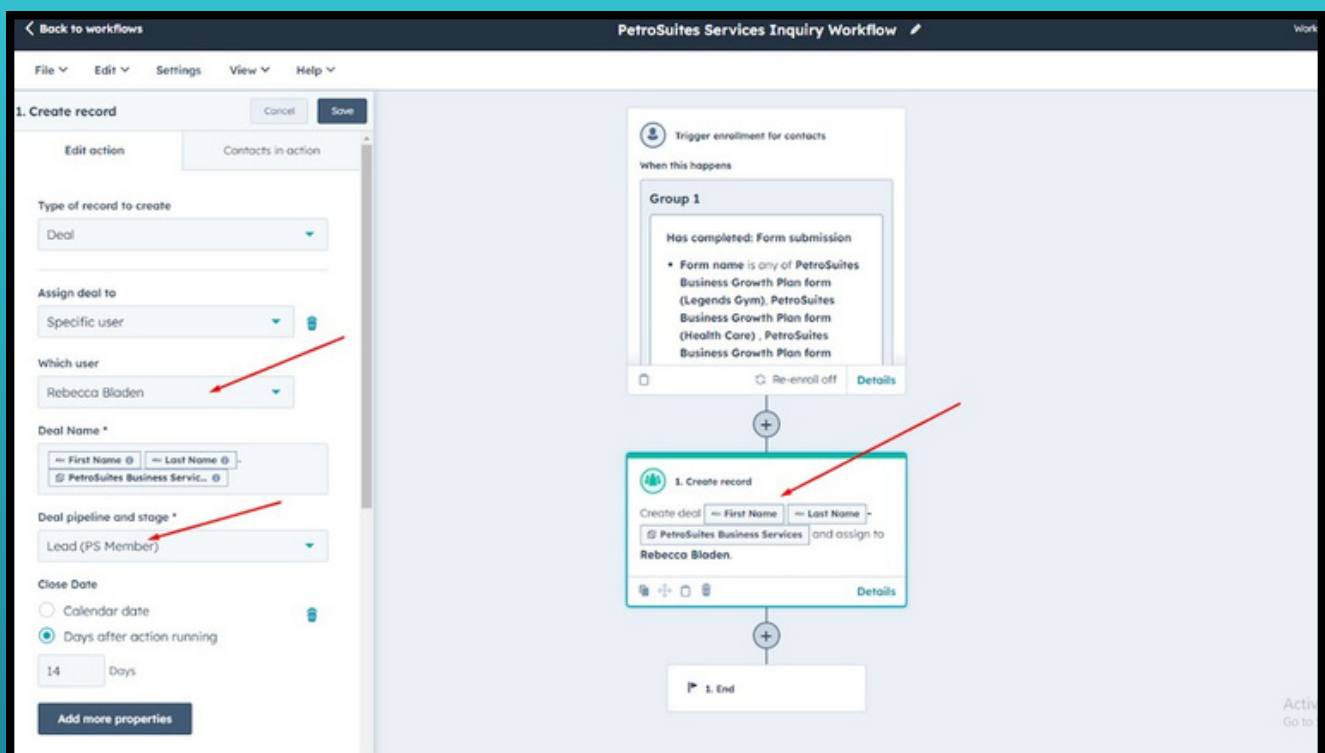
- Trigger enrollment for contacts:** The starting point of the workflow.
- When this happens:** A section for defining the trigger conditions.
- Group 1:** A group containing the condition 'Has completed: Form submission'.
- 1. Create record:** An action step that creates a deal with the name 'PetroSuites Business Services' and assigns it to 'Rebecca Bladen'.
- 1. End:** The final step of the workflow.

Top Right: A status indicator 'Workflow is OFF' and a red 'Review and publish' button. A red arrow points to the 'Review and publish' button.

Form Name: (Petro Suites Business Growth Plan form (Accounting))

This form is used on the website (<https://www.petrosuites.com/accounting-form>) & in the workflow (PetroSuites Services Inquiry Workflow), although the workflow is currently turned off.

Upon form submission, contact and a deal are created in the Lead stage of the PS Member pipeline and assigned to Rebecca Bladen. but the workflow is off.



Form Name: PetroSuites - NPS Test Form

This form is available on the webpage (<https://hjpetro-1230608.hs-sites.com/petrosuites-nps>) and is used to collect feedback from users.

Form Name: Schedule A Virtual Tour - PetroSuites

This form is not used anywhere.

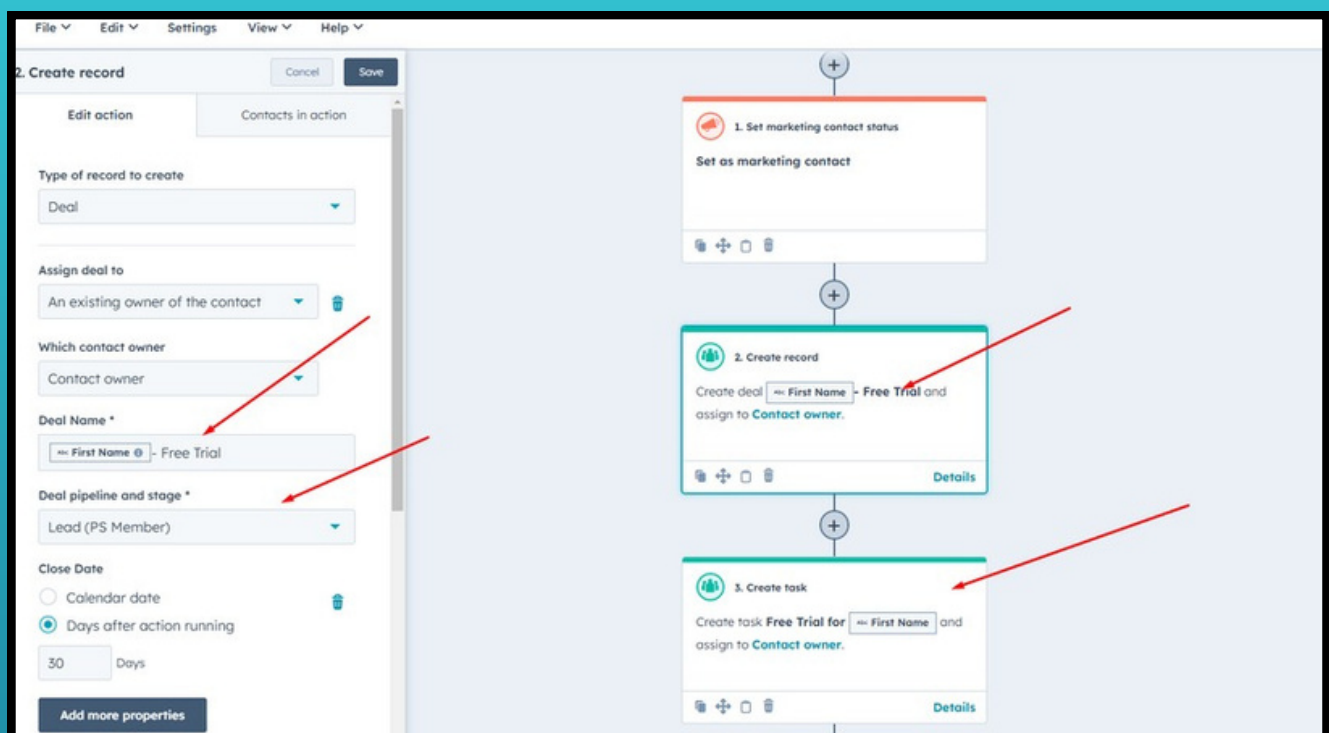
Form Name: Newsletter Sign up - PetroSuites

This form is not used anywhere.

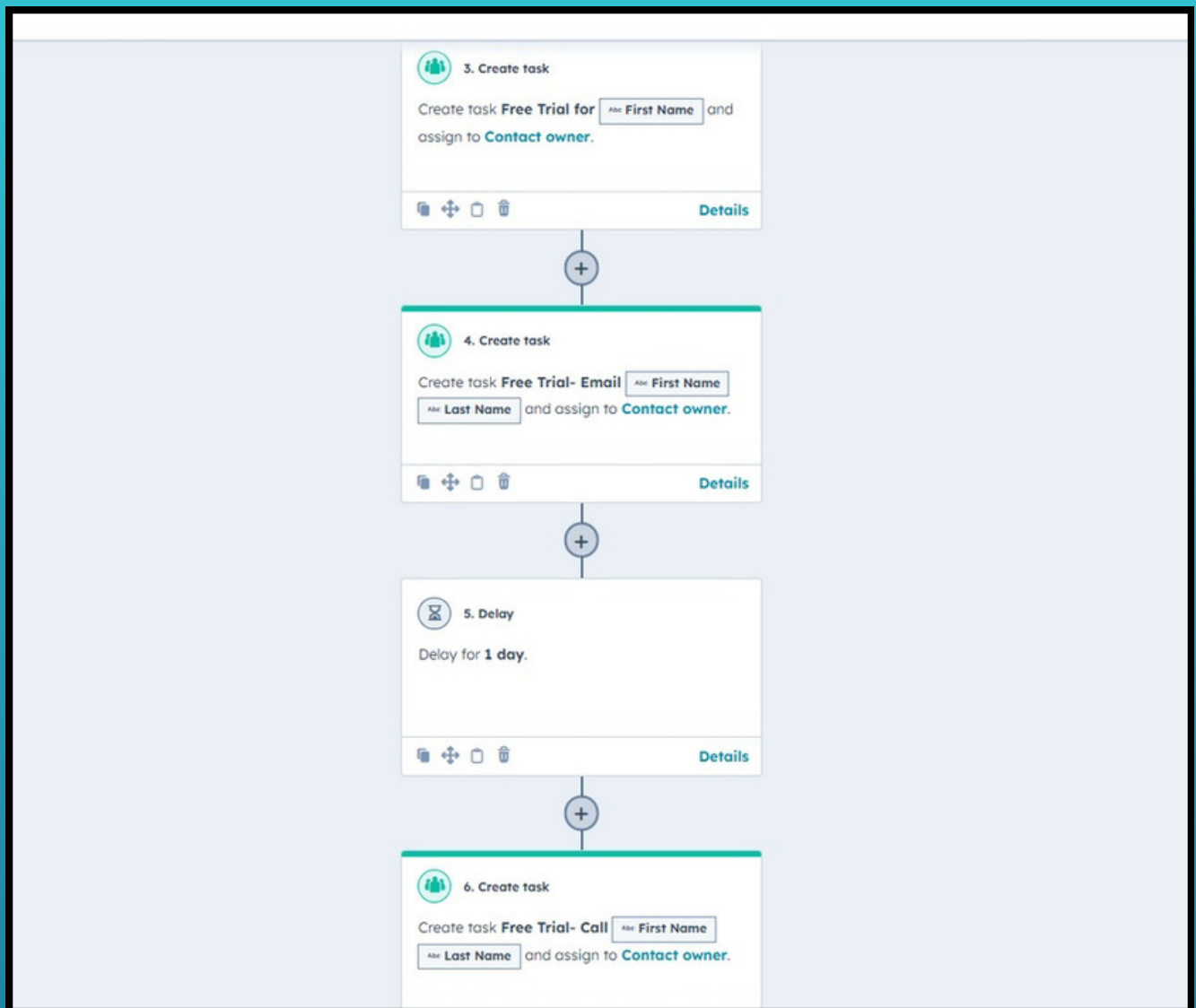
Form Name: Free Trial PetroSuites (Conference room)

This form is used on the website (www.petrosuites.com/meeting-rooms) & in the workflow (PetroSuites Free Trial Workflow), although the workflow is currently turned off.

Upon form submission, set contact as marketing contact, and a deal is created in the Lead stage of the PS Member pipeline and assigned to the Contact Owner.



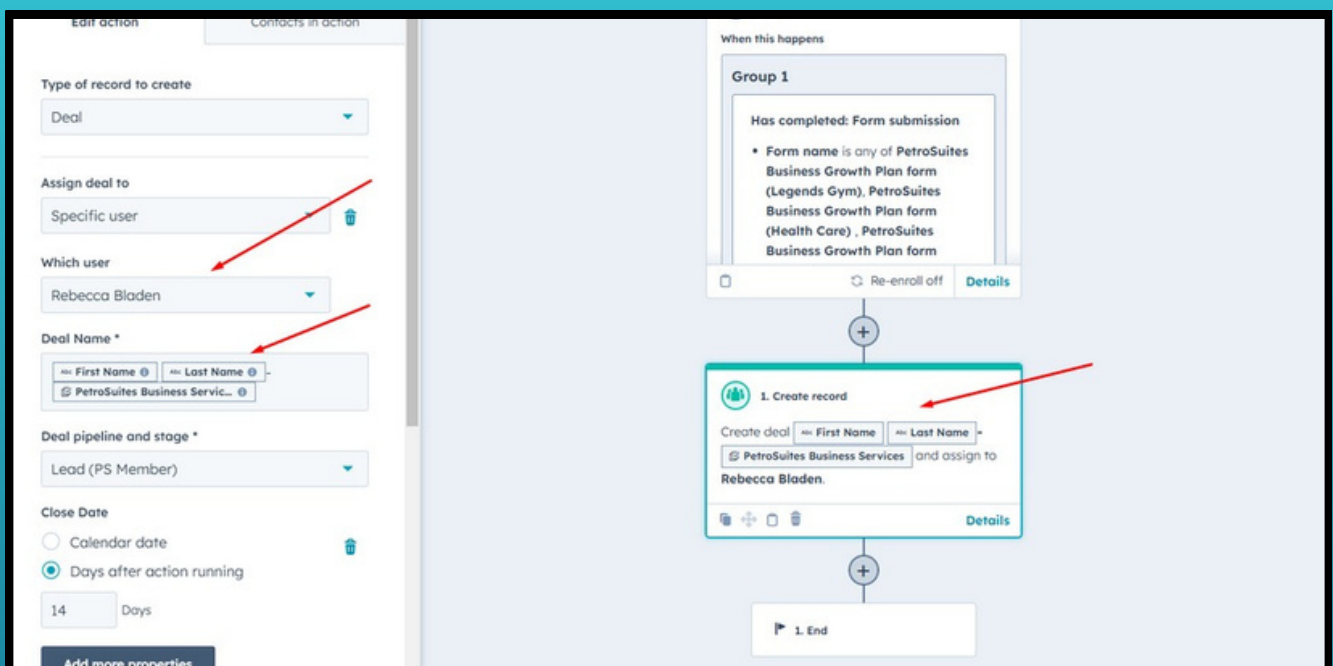
After creating a deal create a task for the owner using contact info please see in below Image



Form Name: PetroSuites Business Growth Plan form (Services page)

This form is used on the website (<https://www.petrosuites.com/services>) and in the workflow (PetroSuites Services Inquiry Workflow), although the workflow is currently turned off.

- Upon form submission, contact and a deal are created in the Lead stage of the PS Member pipeline and assigned to Rebecca Bladen.



Form Name: PetroSuites Temp Survey

This form is used in survey emails, which are sent to contacts in the "PetroSuites Downtown Members" list. A workflow is triggered based on this list, and survey emails are sent with delays added within the workflow.

I have written the email names below:

Email List:

Temp Survey #1
Temp Survey #2
Temp Survey #3
Temp Survey #4
Temp Survey #5
Temp Survey #6
Temp Survey #7

Form Name: PetroSuites Business Growth Plan form (Legends Gym)

This form is used on the website page (www.petrosuites.com/gym-form) and in the workflow. I have already described the workflow functionality please check it here

Form Name: PetroSuites Business Growth Plan form (IT Helpdesk)

This form is used on website pages.

www.petrosuites.com/petrosuites-business-growth-plan-form

www.petrosuites.com/it-helpdesk-form

And also used in the workflow. I have already described the workflow functionality please check it here

Form Name: Virtual Office Virtual Tour - PetroSuites

This form is used on the website page (www.petrosuites.com/virtual-tour-form). On form submission, contact is created in Hubspot.

Form Name: Virtual Office Inquiry - PetroSuites

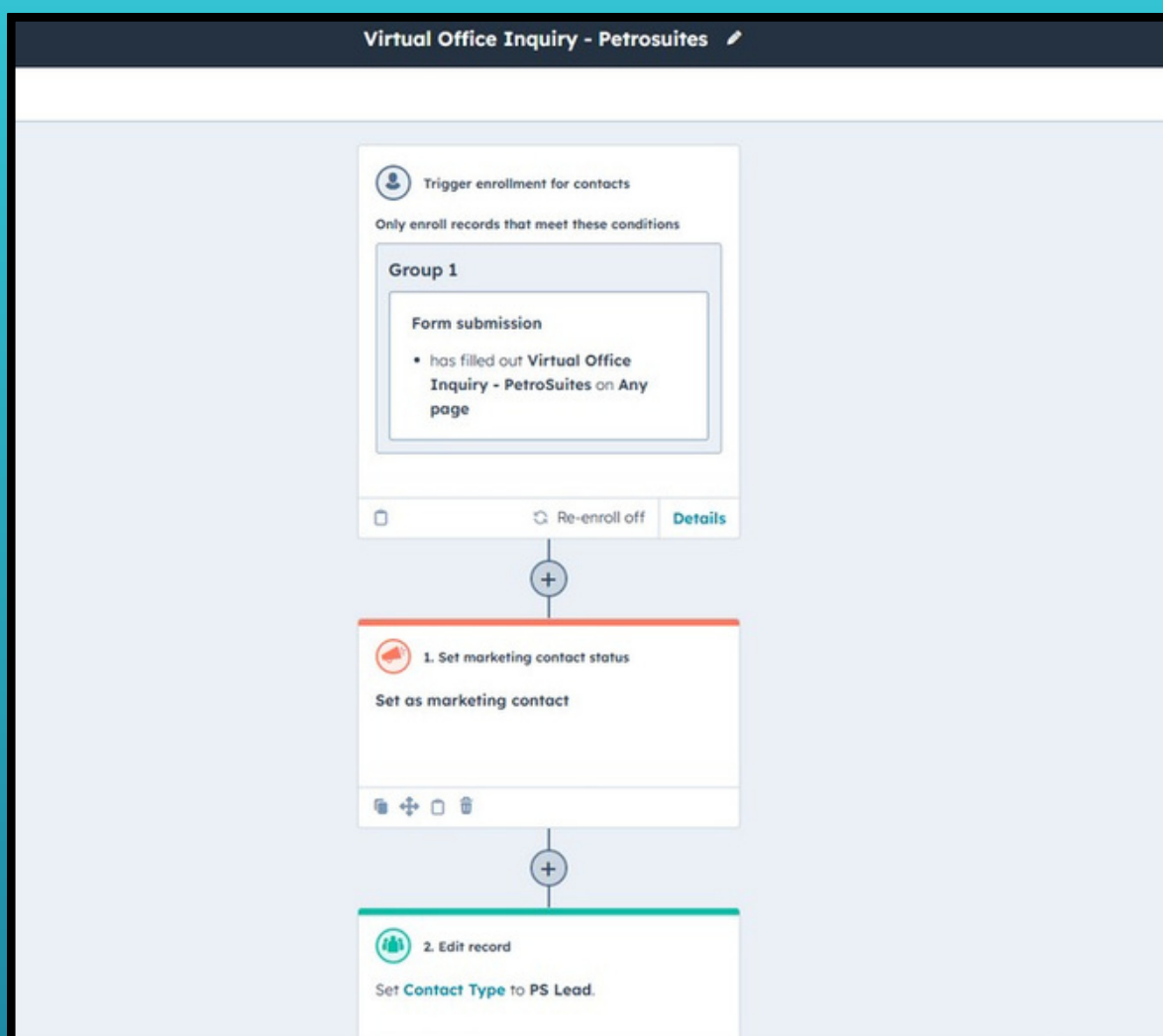
This form is used on website pages.

www.petrosuites.com/virtual-office

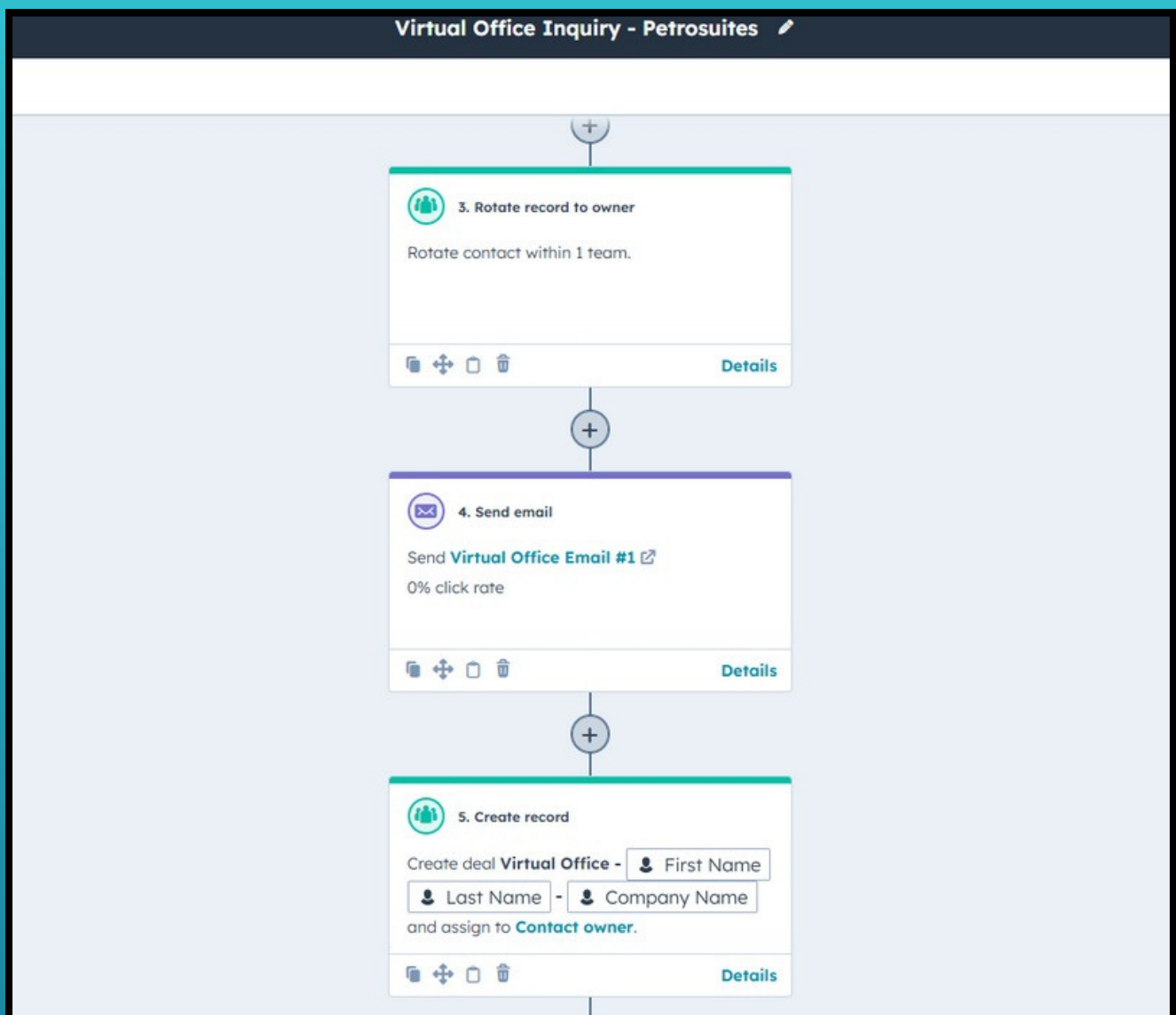
www.petrosuites.com/virtualofficeinquiry

And also used in the workflow (Virtual Office Inquiry - Petrosuites).

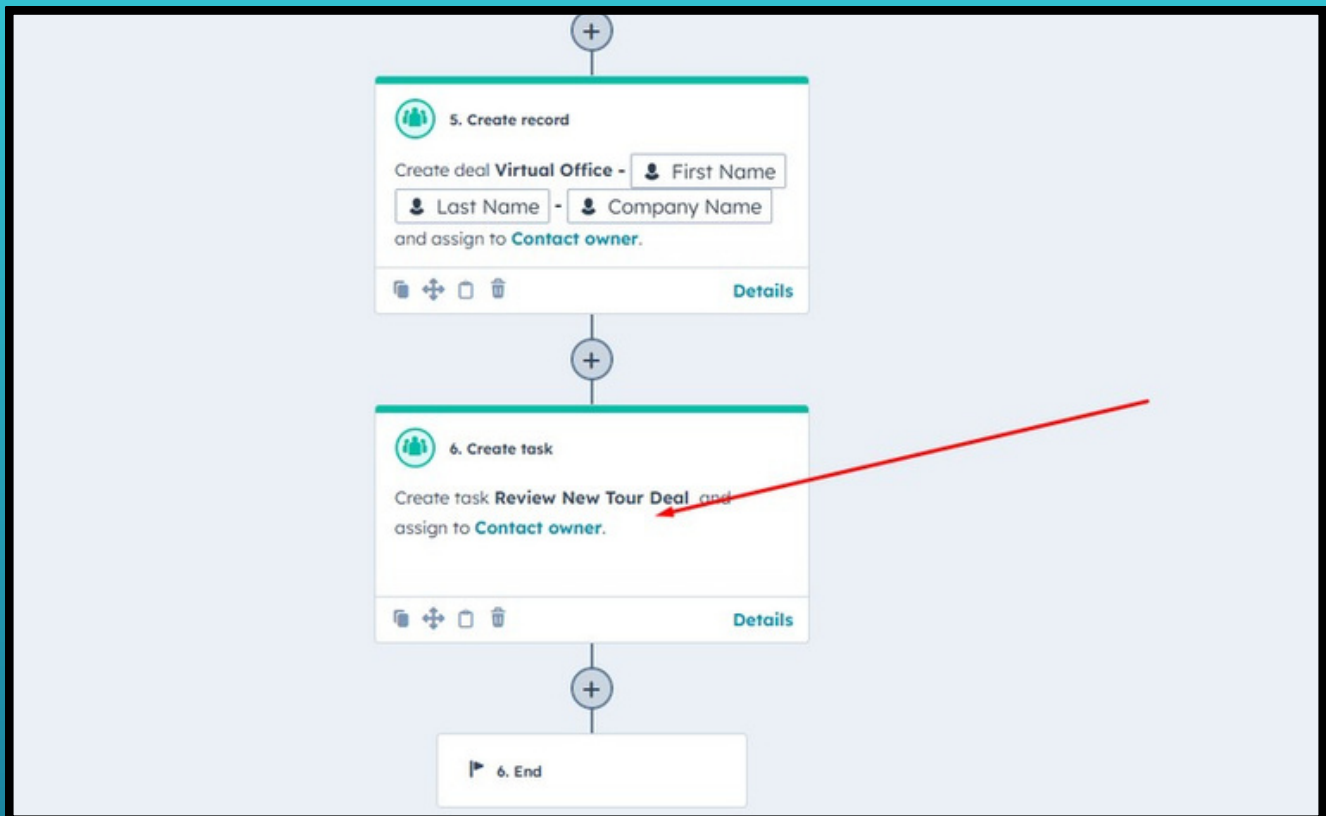
When the form is submitted, a workflow is triggered that sets the contact as a Marketing Contact and assigns the value "PS Lead" to the Contact Type property.



After this process Owner is assigned to contact & send an email (Virtual Office Email #1) to the contact then create a deal with the **Lead** stage in the **PS member Pipeline** assigned to the owner.



And then create a task and assign it to the owner



Form Name: Free Trial PetroSuites (Office for a day)

This form is used on the website page (www.petrosuites.com/office-for-a-day) & in the workflow. I have already described the workflow functionality please check it here

Form Name: Free Trial PetroSuites (Home page)

This form is used on the website Home page (www.petrosuites.com) & in the workflow. I have already described the workflow functionality please check it here

Form Name: Director of Operations - PetroSuites Application Form1

This form is manually sent to the user by the owner

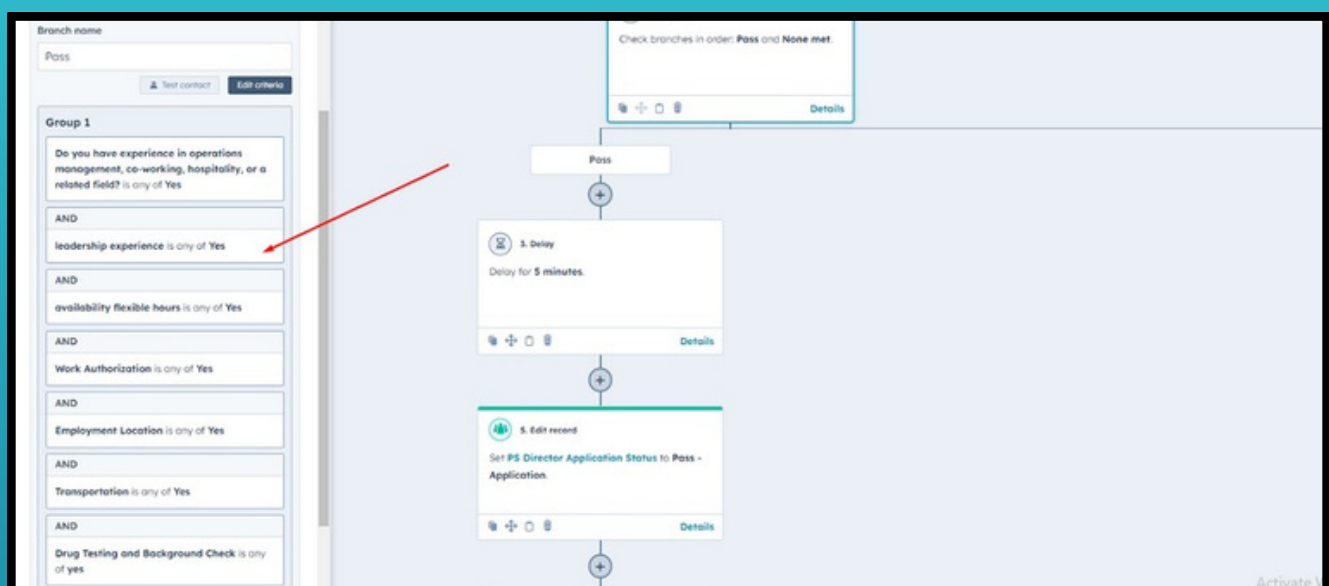
This workflow is used in Two Workflows 1) PS - Director Applicant to Short List 2) PS - Director Create and Associate Reference Contacts after Form Submission (cloned)

We triggered this workflow upon form submission.

1)Workflow: PS - Director Applicant to Short List

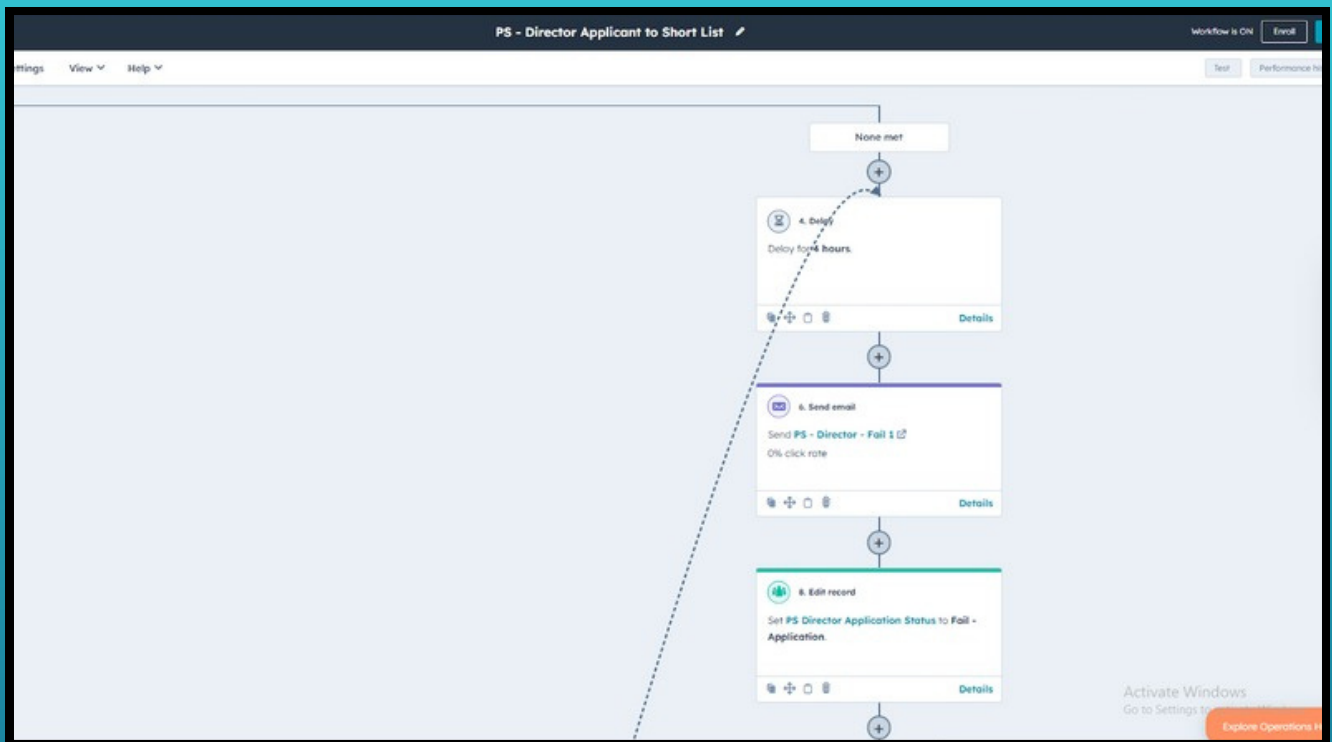
In this workflow We will:

When anyone fills out the form, a deal is created in the Lead stage within the PetroSuites Internal Application pipeline and assign to owner. Then, a branch is created based on the form properties.



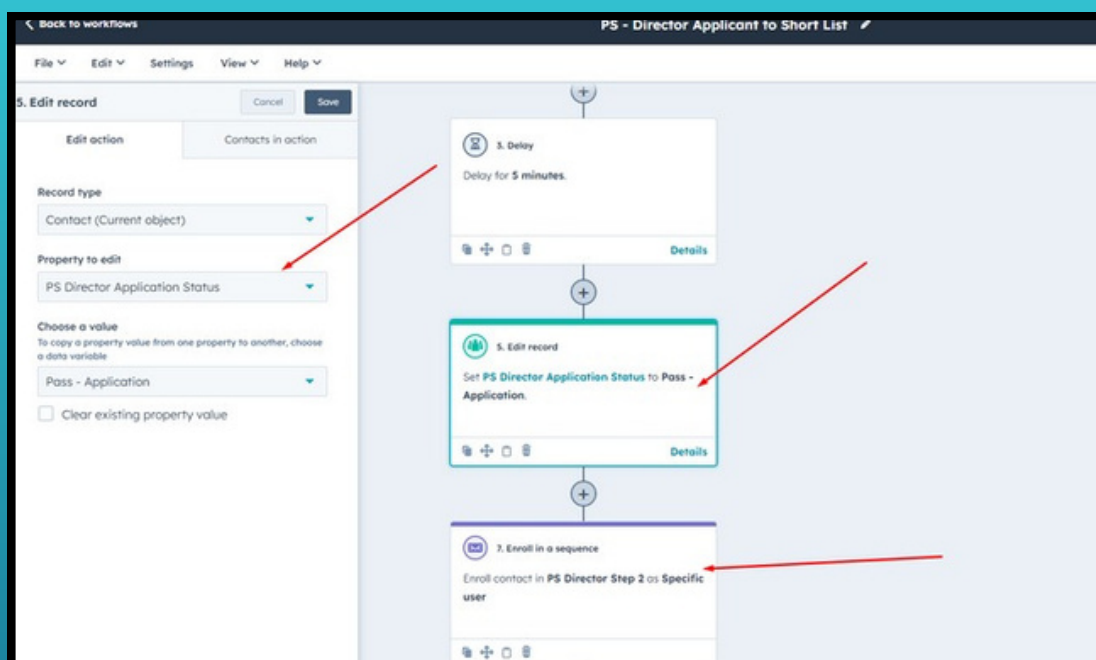
False Scenario

If the user meets the condition, they proceed to the "Pass" action & continue with the next steps. If they do not meet the condition, they are directed to an alternate action.



True Scenario:

If user pass the action then edit the contact property PS Director Application Status

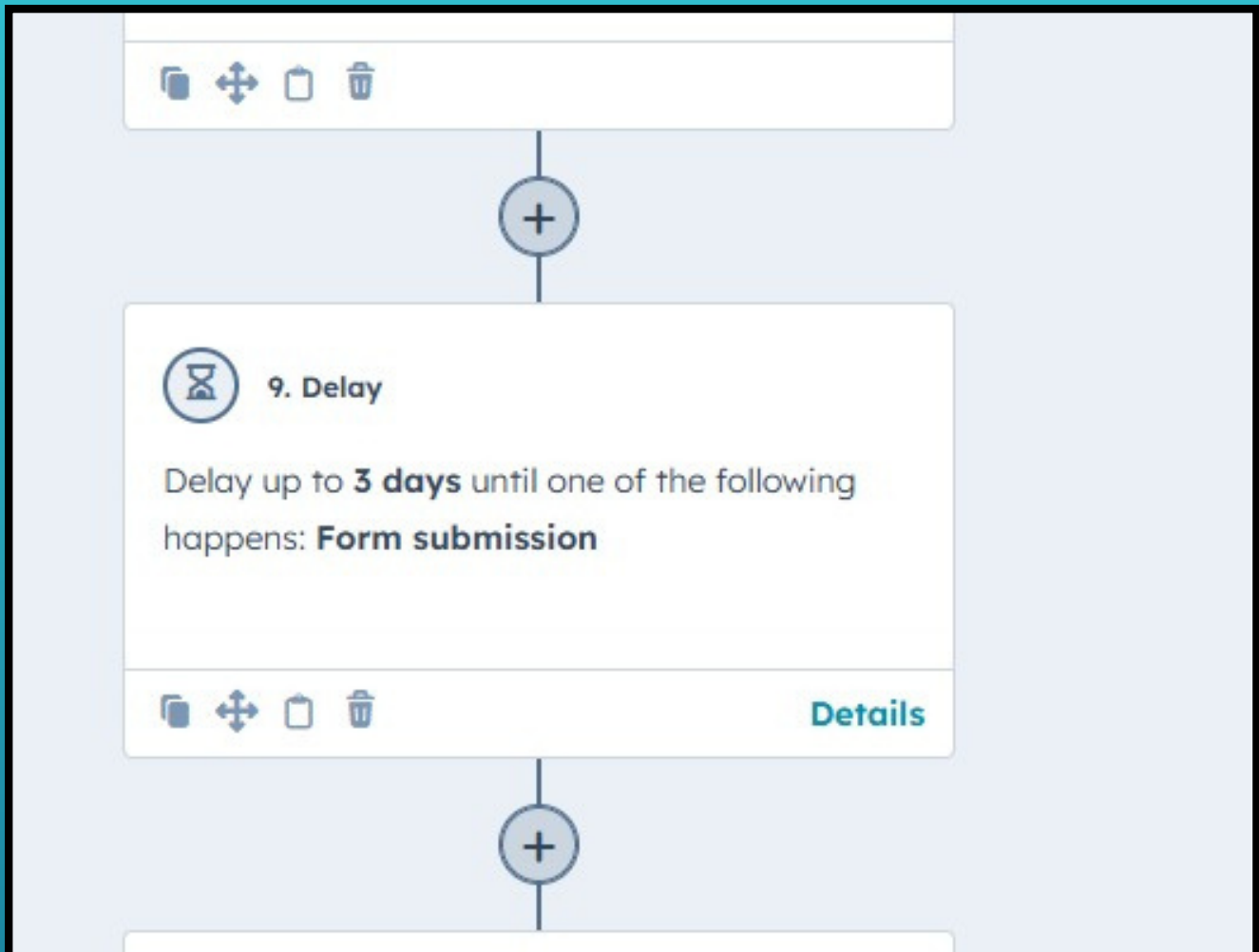


If the user meets the condition, they proceed to the "Pass" action and continue with the next steps. As part of this process, they are enrolled in the PS Director Step 2 sequence, where they receive the PS - Director Application - Form 2. Form Name: PS - Director Application - Form 2

We Used this form in two workflows

1) PS - Director Applicant to Short List 2) PS - Director Applicant - Test (this workflow is like same PS - Director Applicant to Short List But its trigger manually)

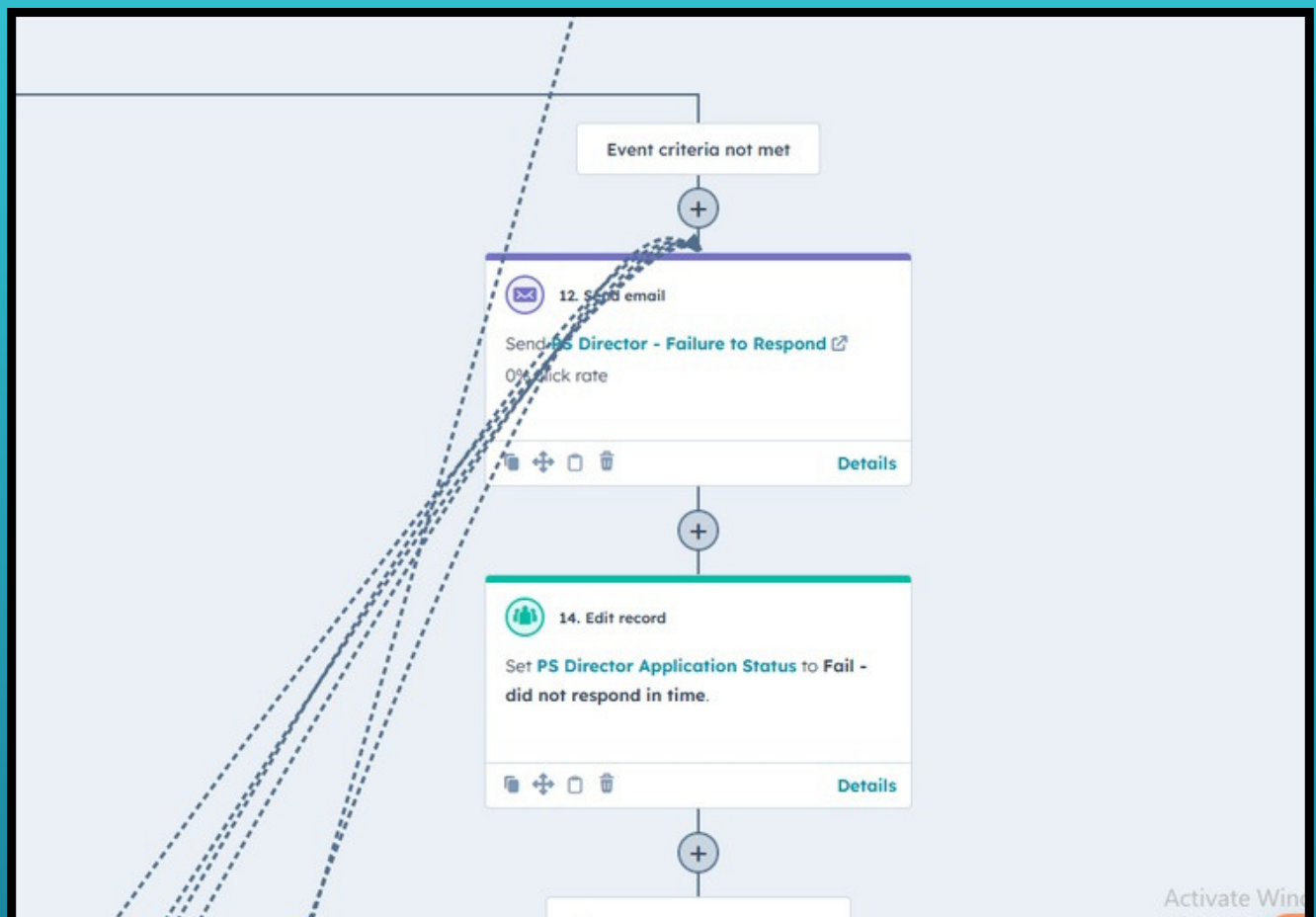
After enrolling in the sequence, we add a 3-day delay from the form submission.



Then, we add a branch: if the user fills out the form and meets the criteria, they proceed to the next step; otherwise, they follow the false criteria path.

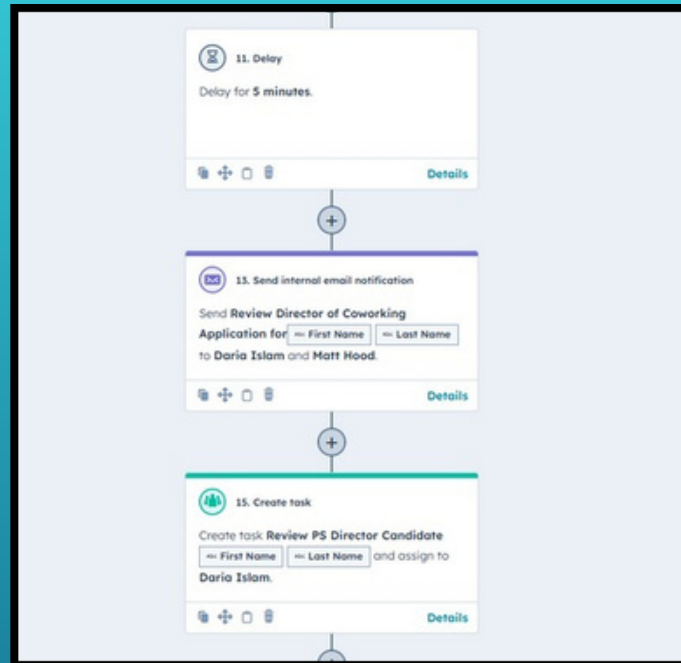
Criteria Not Met:

We send an email ("PS Director - Failure to Respond") to the user and update the property "PS Director Application Status" to "Fail."

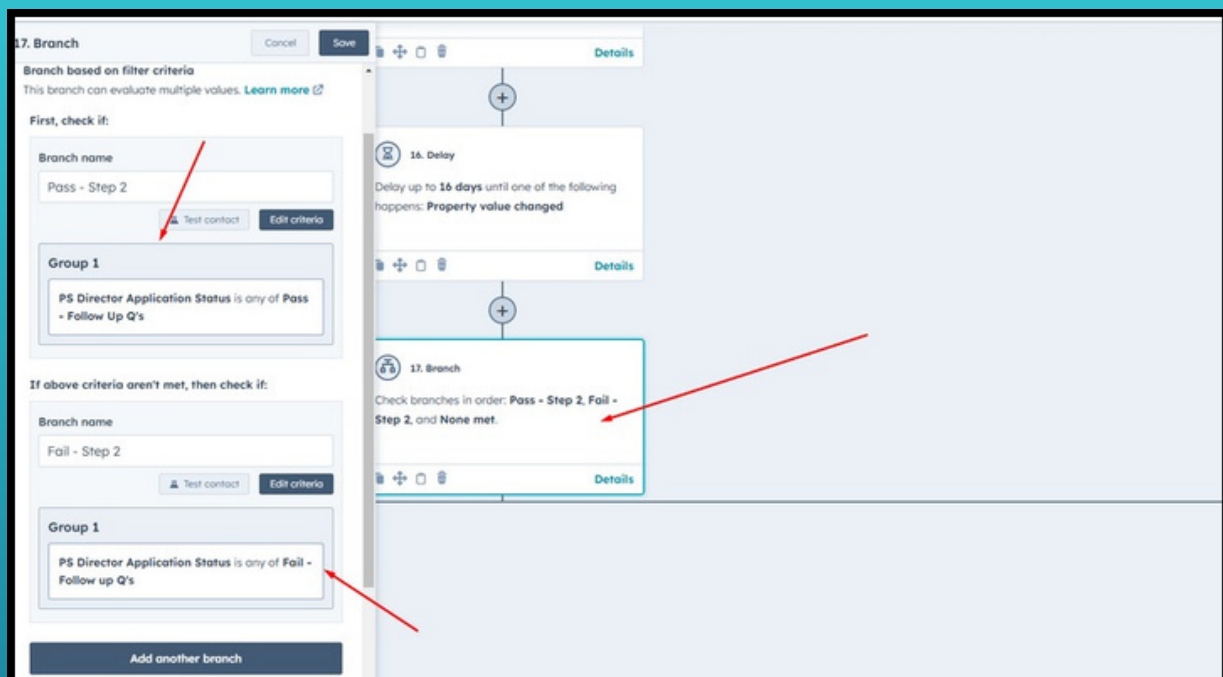


Criteria is Met:

Add a 5-minute delay, then send an internal email to “**Daria Islam**” & “**Matt Hood**.” After that, create a task and assign it to “**Daria Islam**.”

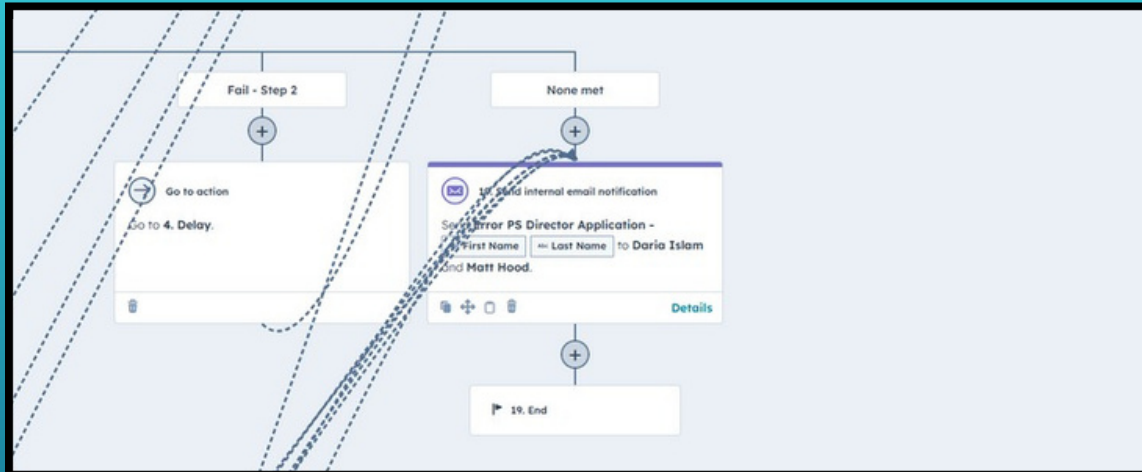


Then, Daria reviews the application and updates the property "PS Director Application Status" to either "Pass - Follow up Q's" or "Fail - Follow up Q's." After this, we add a branch to check whether the "PS Director Application Status" is Pass, Fail, or None Met.



Criteria Not Met:

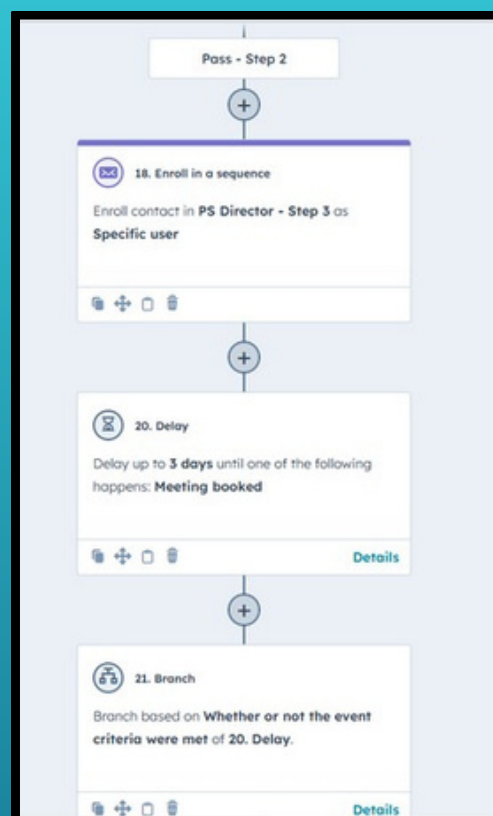
Send an internal email to “**Daria Islam**” and “**Matt Hood.**”



PS Director Application Status is Fail: If the status is **Fail**, follow the previously described fail action.

PS Director Application Status is Pass:

If the status is Pass, we enroll the user in the sequence "PS Director - Step 3", where we send a meeting link with **Daria Islam**.



We are adding a 3-day delay until the user books the meeting.

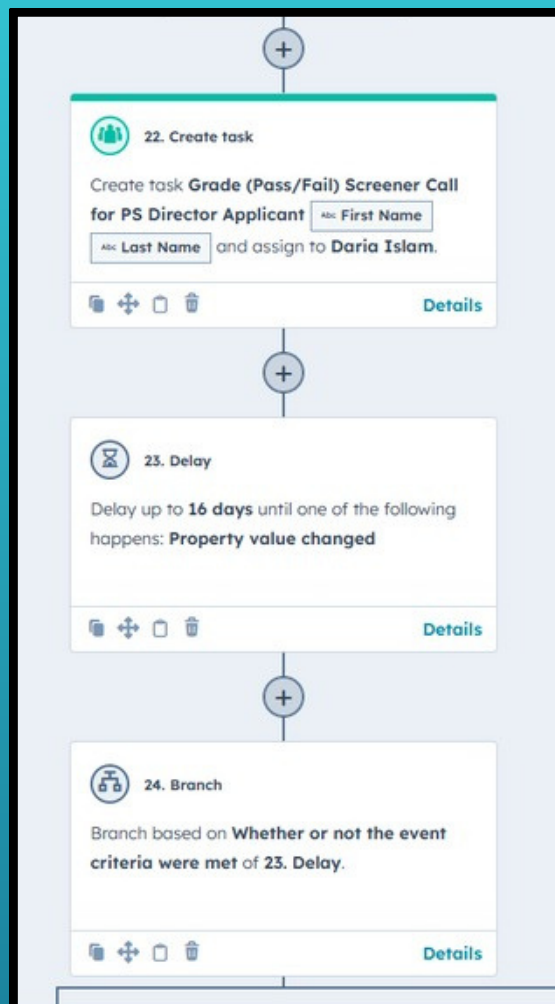
Then, we add a branch to check whether the criteria for the enrolled sequence are met or not.

Criteria Not Met:

If the criteria are not met, follow the fail action I previously described.

Criteria Met:

Create a task named "**Grade (Pass/Fail) Screener Call for PS Director Applicant**" and assign it to **Daria Islam**.



Then, Daria reviews the application and updates the property "**PSDirector Application Status**" to either "**Pass - Screener**" or "**Fail - Screener**." After this, we add a branch to check whether the "**PS Director Application Status**" is **Pass**, **Fail**, or **None Met**.

Criteria Not Met:

If the status is **none met**, follow the previously described action.

PS Director Application Status is Fail - Screener.:

If the status is **Fail**, follow the previously described fail action.

PS Director Application Status is Pass - Screener:

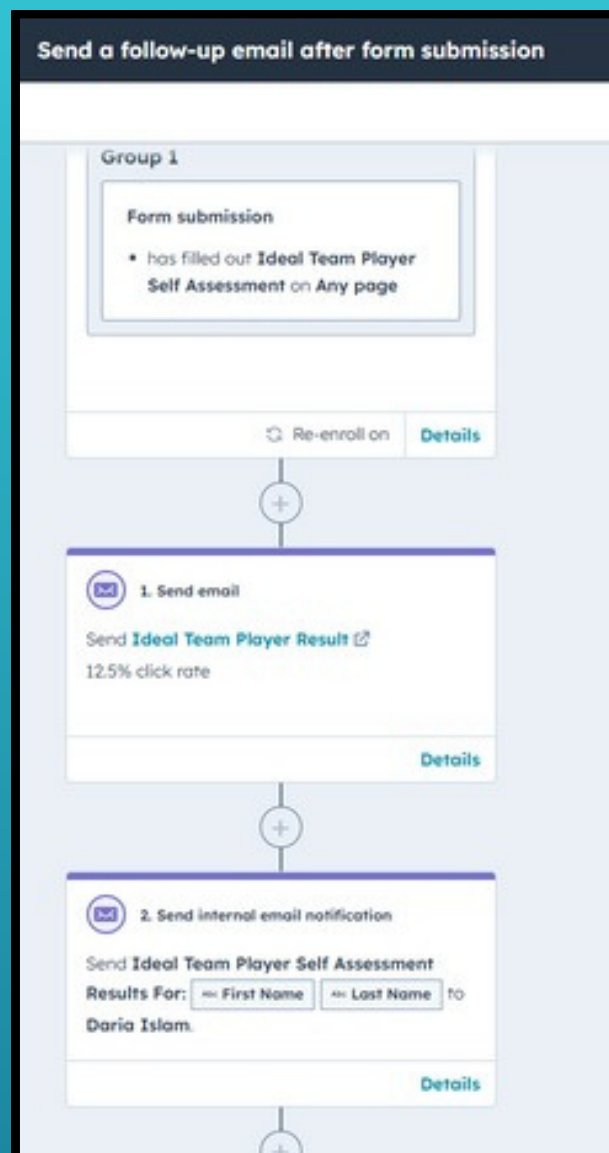
If the status is Pass, we enroll the user in the sequence "PS Director - Step 4", where we send a Form (Ideal Team Player Self Assessment).

Form Name: Ideal Team Player Self Assessment

We Used this form in workflow:

1. Send a follow-up email after form submission

Upon form submission, we send an email (Ideal Team Player Result) to the user and also send an internal email to **Daria Islam**.



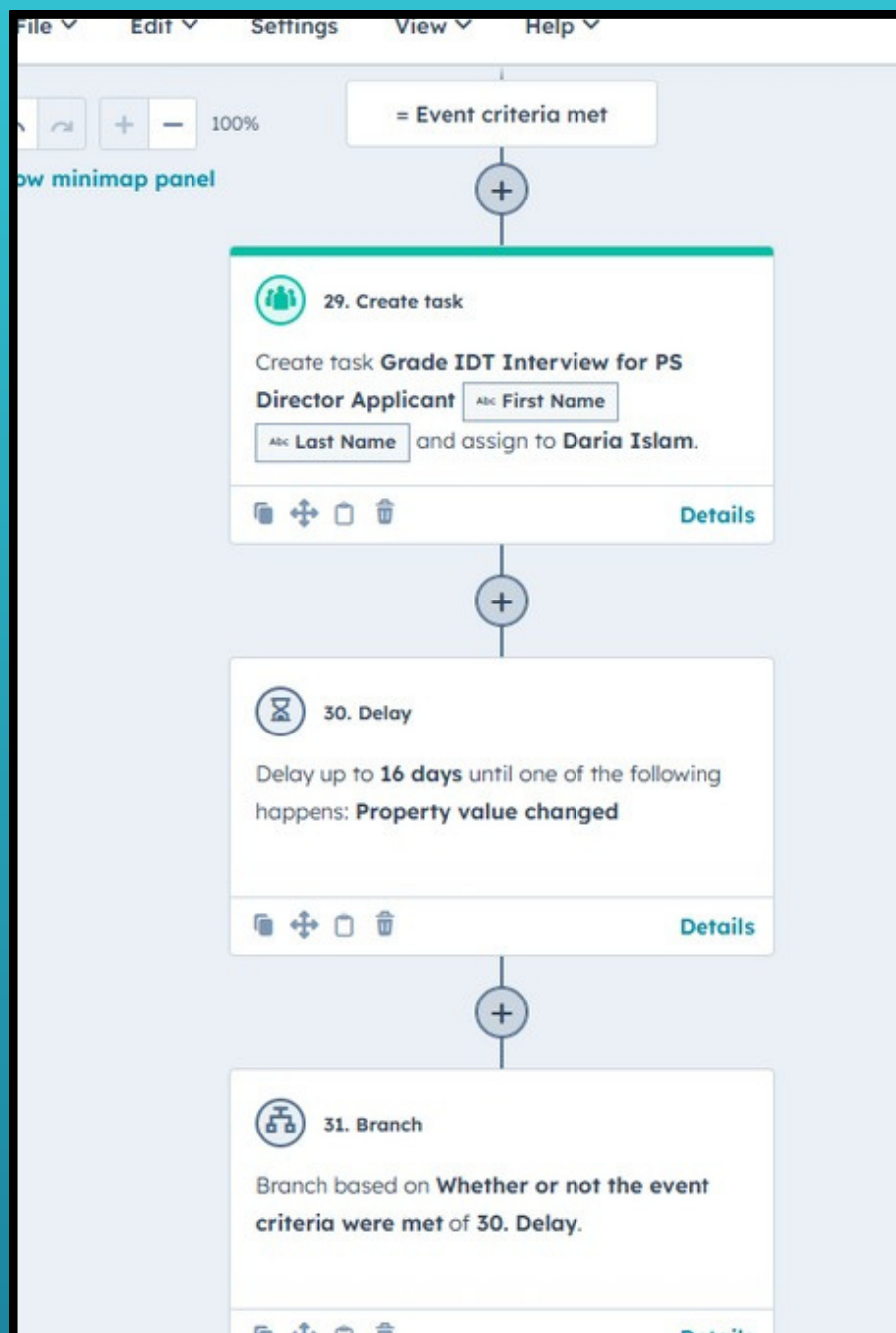
Then, we add a branch to check whether the criteria for the enrolled sequence are met or not.

Criteria Not Met:

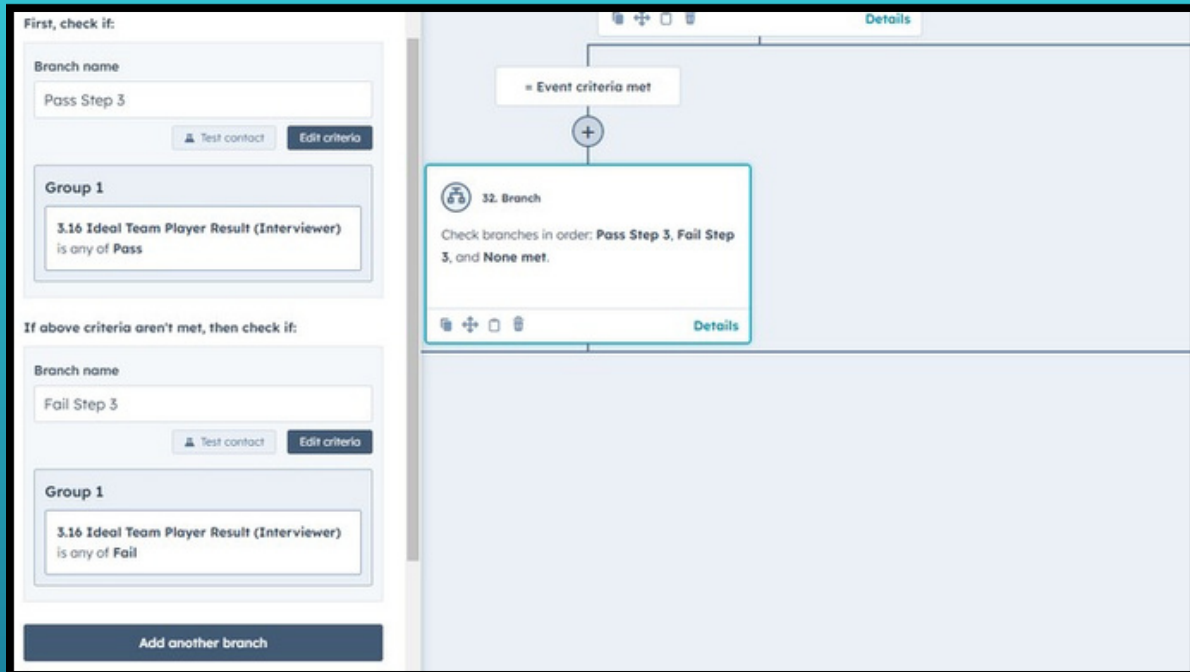
If the criteria are not met, follow the fail action I previously described.

Criteria Met:

Create a task named "**Grade IDT Interview for PS Director Applicant**" and assign it to **Daria Islam**.



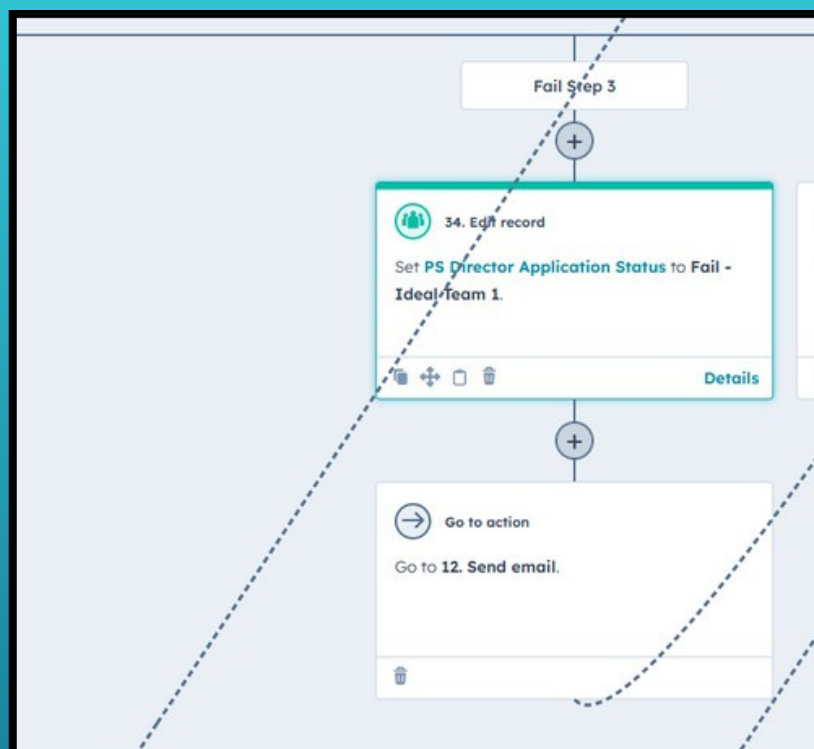
After this, we add a branch to check whether the "3.6 Ideal Team Player" is Pass, Fail, or None Met.



Criteria Not Met: If the criteria are not met, follow the fail action I previously described.

3.6 Ideal Team Player Status is Fail:

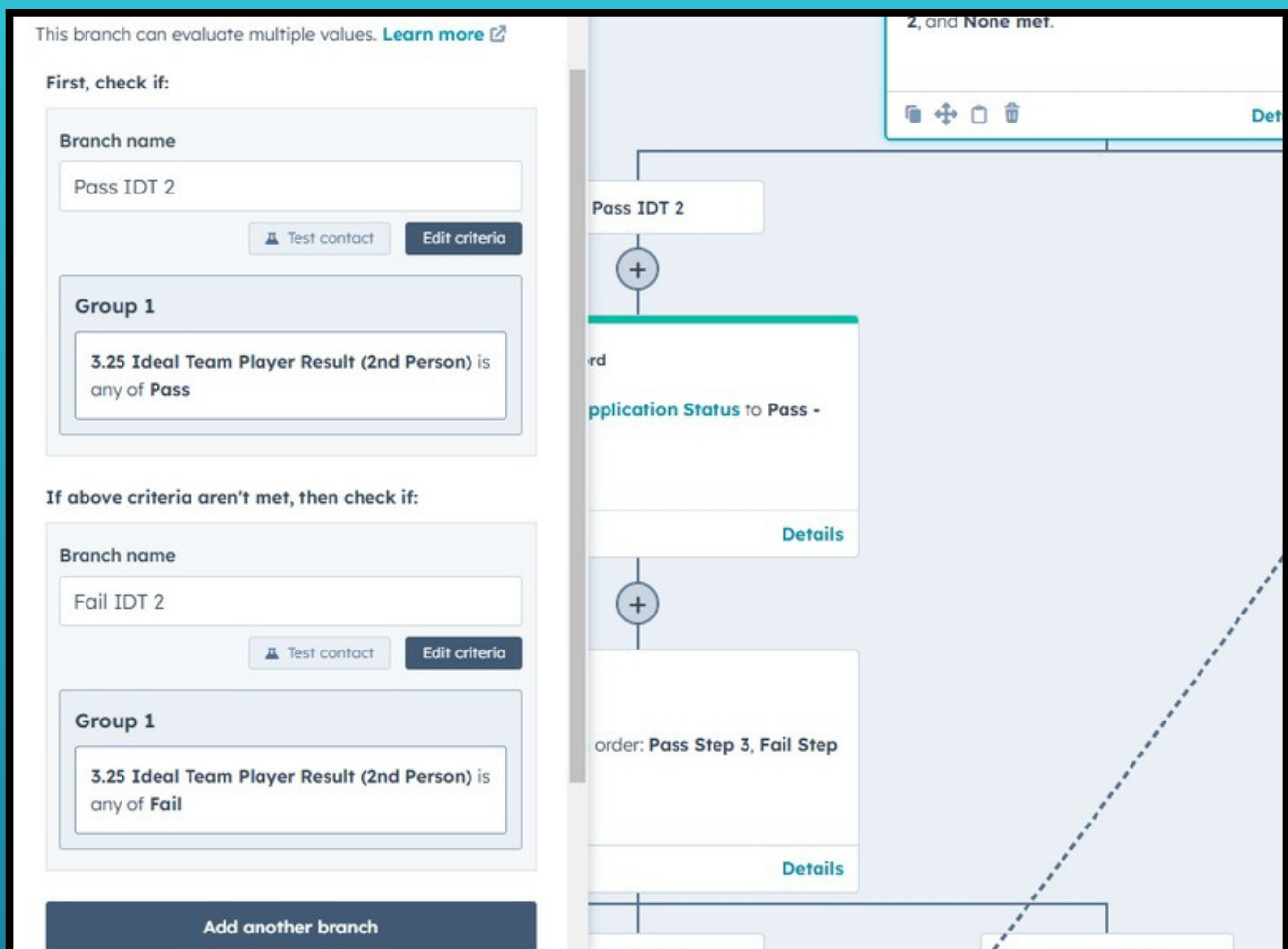
Update the **PS Director Application Status** to **Fail - Ideal Team 1**, & then follow the action previously described.



3.6 Ideal Team Player Status is Pass:

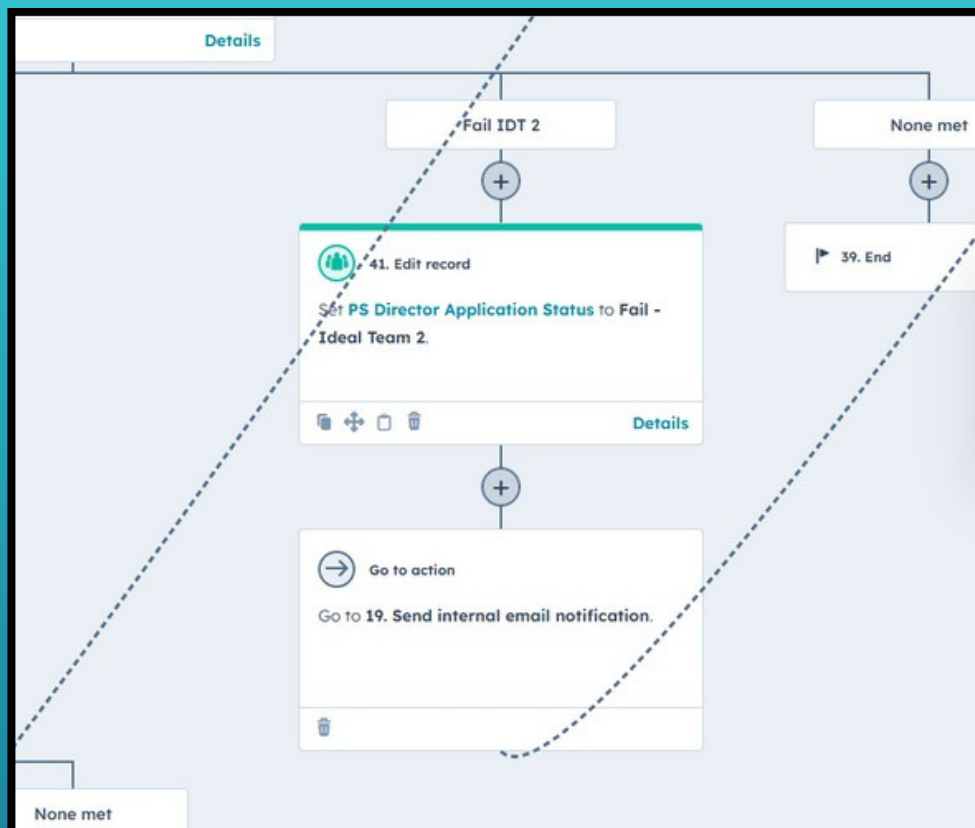
Update the **PS Director Application Status** to **Pass - Ideal Team 1** after a 2- minute delay. Then, create a task named "**Grade IDT Interview for PS Director Applicant**" and assign it to Matt Hood. Then Matt check the Task and update the property "**3.25 Ideal Team Player Result (2nd Person)**" Pass or Fail before 14 days.

After this, we add a branch to check whether the "3.25 Ideal Team Player Result (2nd Person)" is Pass, Fail, or None Met.



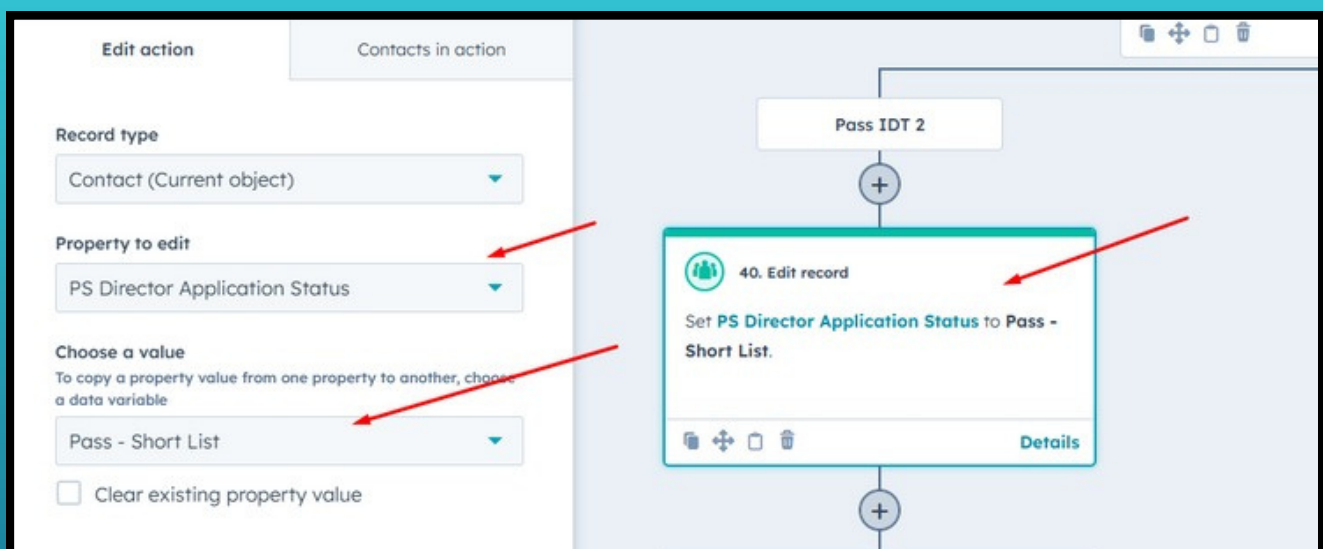
Criteria none met: blank

3.25 Ideal Team Player Result (2nd Person) is Fail: Update the **PS Director Application Status** to **Fail** - **Ideal Team 2**, and then follow the action previously described.



3.25 Ideal Team Player Result (2nd Person) is Pass:

Update the **PS Director Application Status** to **Pass** - **Short List**.



Form Name: PetroSuites - NPS Test Form (horizontal test)

This form is used on website pages for feedback

1. www.petrosuites.com/feedback
2. hjpetro-1230608.hs-sites.com/petrosuites-nps

Form Name : Director of Operations - PetroSuites Application Form 10 Ga

This Form is used in workflows

1. Send a follow-up email after form submission
2. PetroSuites Director of Co-working Initial Applicants

Workflow Name : Send a follow-up email after form submission

On form Submission we send a follow up email (PS - Director - Pass 1).
But the workflow is off.

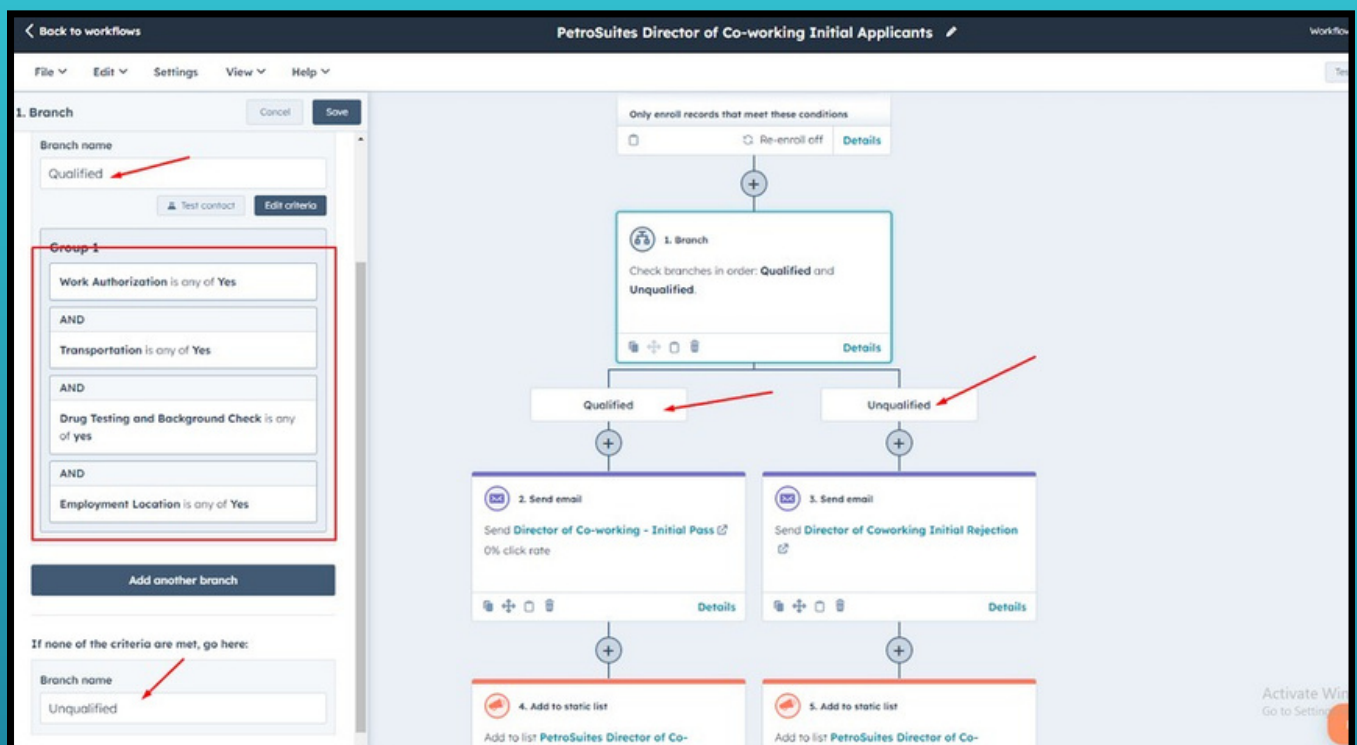
Workflow Name : PetroSuites Director of Co-working Initial Applicants

Upon form submission, Workflow ("PetroSuites Director of Co-working Initial Applicants") is triggered.

The screenshot displays a webform configuration interface. At the top, there are tabs for 'Enrollment', 'On-enrollment', and 'Re-enrollment'. Below these, a light blue box states 'Contacts can be manually enrolled'. A link '< Change automatic trigger type' is visible. The main section is titled 'Automatically trigger enrollment when an event occurs (optional)' with a 'Learn more' link. Below this is a button 'Generate a trigger with AI' and a 'BETA' label. An 'Edit criteria' button is also present. A red rectangle highlights a section titled 'Group 1' which contains the text 'Has completed: Form submission' and a bulleted list: '• Form name is any of Director of Operations - PetroSuites Application Form 1 OG'. At the bottom, there is a link 'Manage webhook triggers' and a section titled 'Only enroll contacts that meet these conditions' with the text 'Contacts will only be enrolled if they also meet the following'.

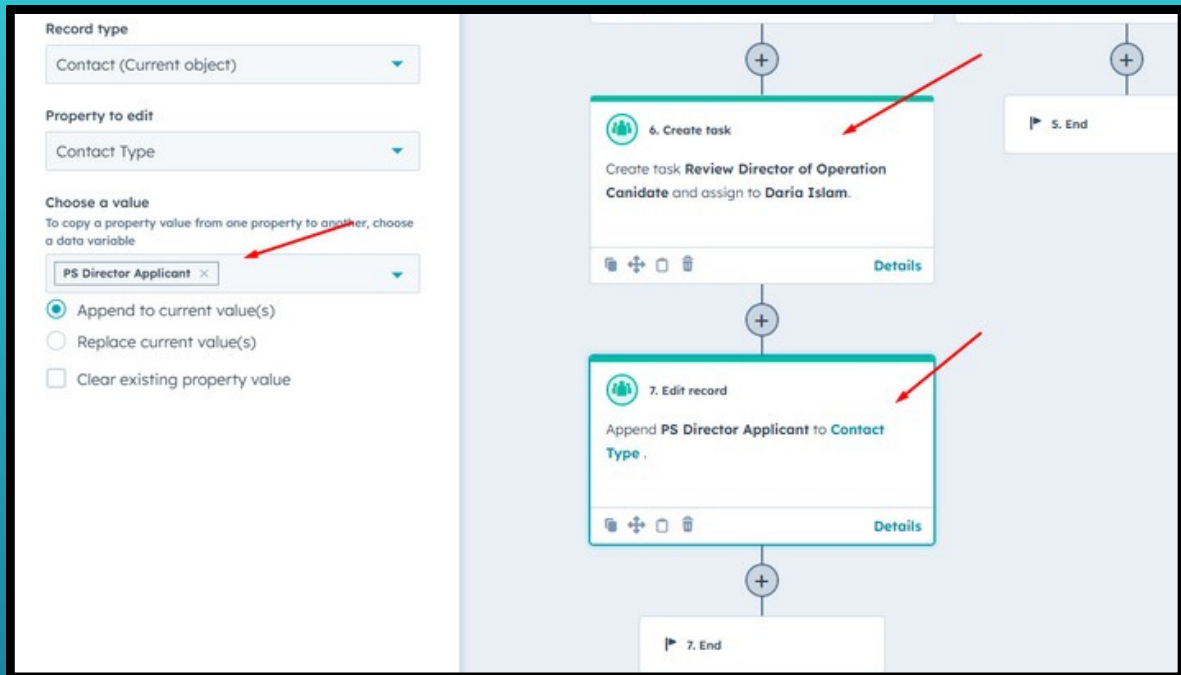
After this, we add a branch to check whether the Properties **"Work Authorization , Transportation , Drug Testing & Background Check , Employment Location"** is **Yes** or **No**.

If all these property values are Yes, it moves to the Qualified condition; otherwise, it moves to Unqualified.



Qualified Criteria

We send an email ("**Director of Co-working - Initial Pass**") to the user and add them to the list "**PetroSuites Director of Co-working Candidates.**" Then, we create a task named "**Review Director of Operations Candidate**" and assign it to Daria Islam.



Then, update the contact property "**Contact Type**" to "**PS Director Applicant.**"

Unqualified Criteria:

We send an email ("**Director of Coworking Initial Rejection**") to the user & add them to the list "**PetroSuites Director of Co-Working Rejections.**"

Form Name : PS Referral Form

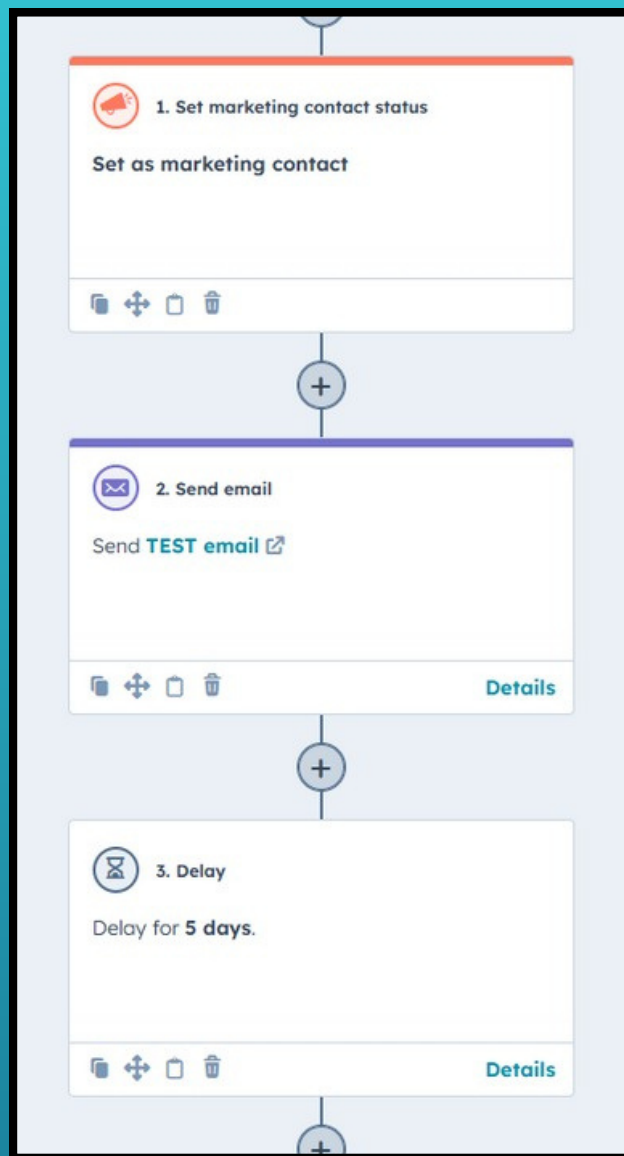
This form is used in workflows and websites.

Workflow:

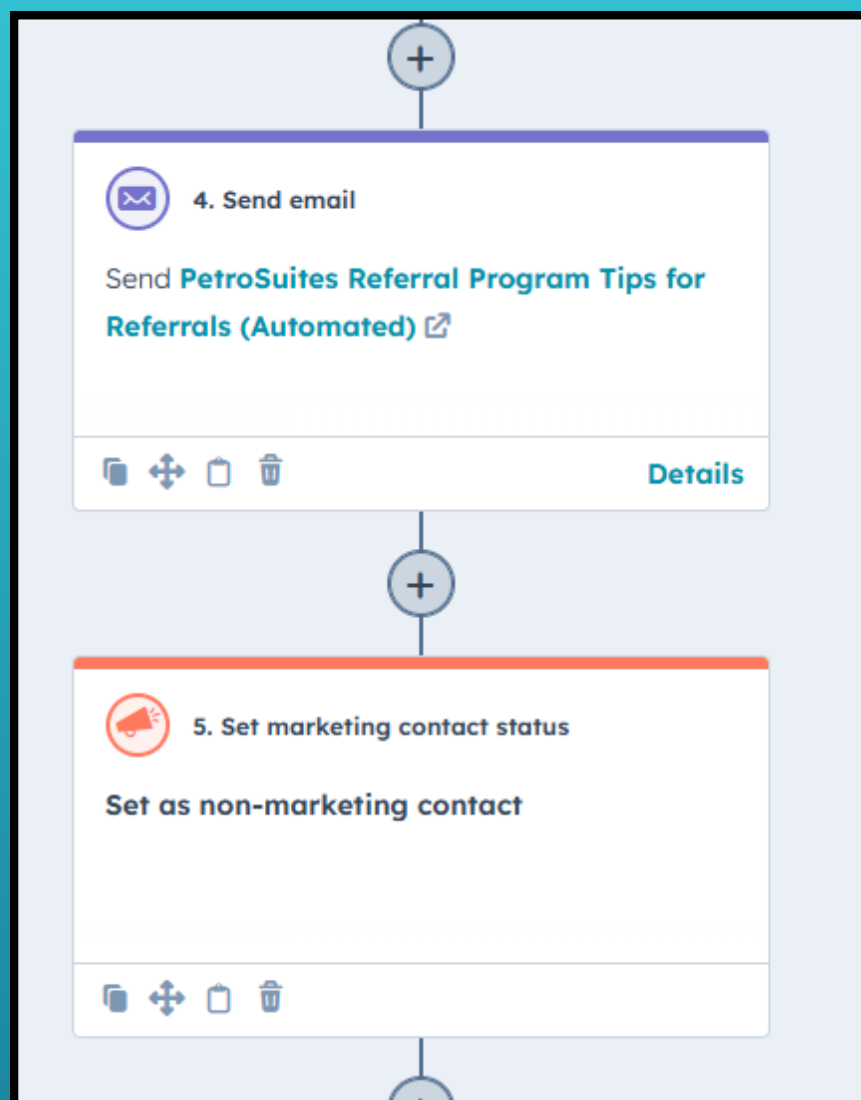
PS Referral - Make a Referral Submitted (Workflow is off)

Website:**www.petrosuites.com/referral**

When a form is submitted, a workflow is triggered to create a contact in HubSpot, set them as a marketing contact, send an email, & add a 5-day delay.

**Form Name: Free Trial membership - PetroSuites**

Then again send the email (PetroSuites Referral Program Tips for Referrals (Automated))
and then set a contact as a non-marketing contact.



Form Name: Free Trial membership - PetroSuites

Contact Us

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