# Simple Strat

WORKFLOW GUIDE —
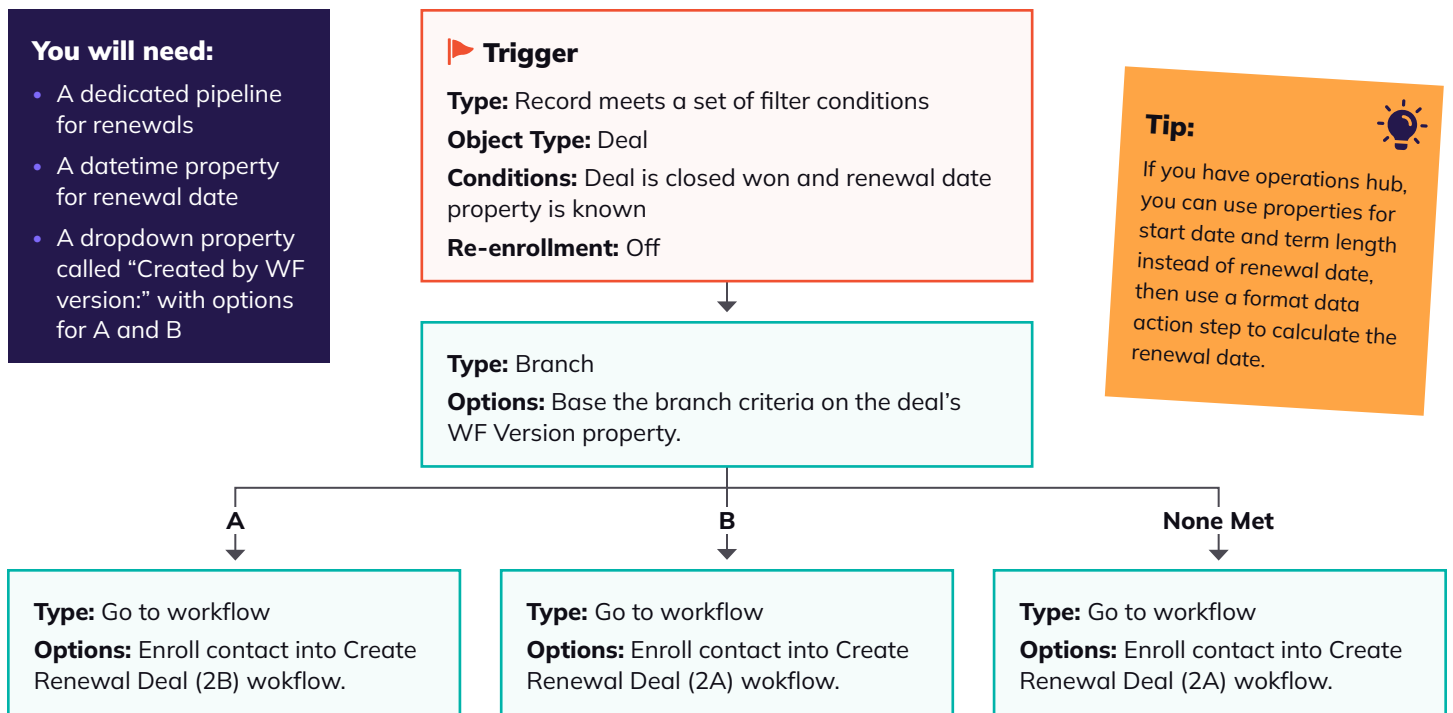
# Automatically Create Renewal Deals

## Create a workflow following the instructions below, named "Create Renewal Deal (1)"

**You will need:**

- A dedicated pipeline for renewals
- A datetime property for renewal date
- A dropdown property called "Created by WF version:" with options for A and B

### ⚑ Trigger

**Type:** Record meets a set of filter conditions
**Object Type:** Deal
**Conditions:** Deal is closed won and renewal date property is known
**Re-enrollment:** Off

**Tip:**

If you have operations hub, you can use properties for start date and term length instead of renewal date, then use a format data action step to calculate the renewal date.

**Type:** Branch
**Options:** Base the branch criteria on the deal's WF Version property.

**A**

**Type:** Go to workflow
**Options:** Enroll contact into Create Renewal Deal (2B) wokflow.

**B**

**Type:** Go to workflow
**Options:** Enroll contact into Create Renewal Deal (2A) wokflow.

**None Met**

**Type:** Go to workflow
**Options:** Enroll contact into Create Renewal Deal (2A) wokflow.

## Create two identical workflows following the instructions below, with one named "Create Renewal Deal (2A)" and the other "Create Renewal Deal (2B)"

### ⚑ Trigger

**Type:** Trigger manually
**Object Type:** Deal
**Re-enrollment:** Off

**Type:** Create Record

**Options:** Create deal in your renewal pipeline with the close date set to the enrolled deal's renewal date. Also copy any other important properties that will be relevant for the renewal deal.