



Automating Common Business Workflows: *A Cheat Sheet*

1. Identify Workflow Gaps

NEEDS

What's the 'big picture'?
What process are you trying to automate?

DATA

What data do you need to collect? Where and how is it stored?

WORKFLOW

When and how frequently do you need this data? Who needs to access it or be notified?

2. Build the interface

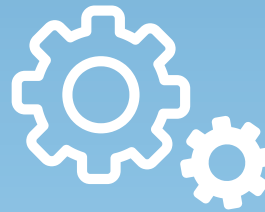
Once you've identified major gaps, you can then begin building your interface(s). **Iguana** can manage APIs, allowing you to connect with external services and leverage their functionalities in your workflows. When integrating APIs, follow the steps below for success.



Obtain and review API documentation



Determine your API's authentication and security protocol



Build your API tools. Don't forget to modularize to save time in the future



Test! Ensure function and performance are as desired

Questions? Reach out to contact@interfaceware.com for more information.



INTERFACEWARE



Workflows Featured in this Webinar

Cross-Platform Data Summarization for Sales Insights



Daily Professional Services Updates

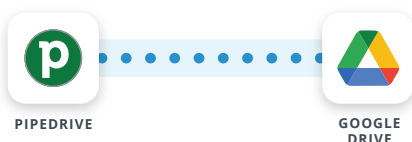
Daily scan in ClickUp for services rendered to provide the sales team with Pipedrive updates on each customer.

Dynamic Resources Linking in CRM



Customer Support Tickets Integration

Auto-generate links in Pipedrive to access and view all customer-related support tickets in Jira at a glance.

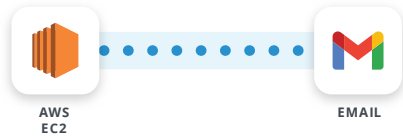


Auto-generate Links to Customer Documents

Auto-generate links in Pipedrive to access and view all customer-related support tickets in Jira at a glance.

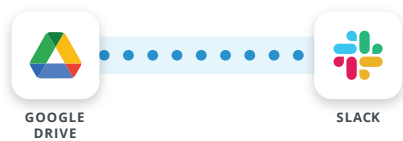
Sample Workflows

The following are examples of possible API integrations using Iguana; Iguana's flexibility extends far beyond the examples below.



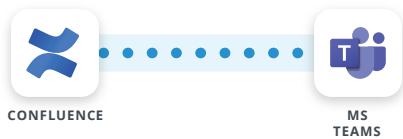
Server Provisioning Updates

If a new EC2 instance is provisioned or terminated, send an email notification to admin.



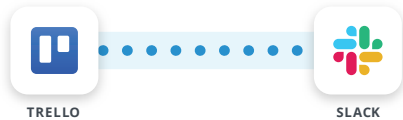
Backup Completion Notifications

When a backup is completed and stored in Drive, send a Slack notification indicating backup success or issues.



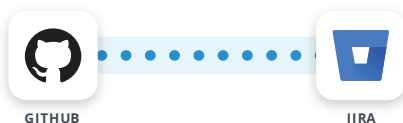
Documentation Update Alerts

When a specific Confluence page is updated, notify a Teams channel to update the relevant team members.



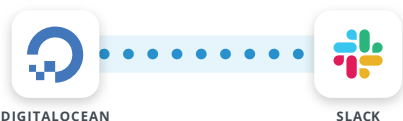
Project Management and Communication

As tasks are assigned or updated in Trello, automatically notify specific Slack channels.



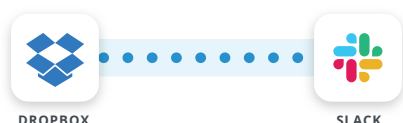
Code Repository to Issue Tracker Integration

New commit or a pull requests in GitHub automatically create or update a JIRA ticket with commit details.



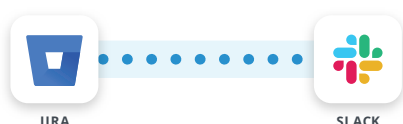
Server Monitoring and Alerts

If a server in DigitalOcean reaches a resource usage threshold (CPU memory, etc.), an alert is sent to a Slack channel.



Documentation Collaboration and Storage

When a document is uploaded or edited in Dropbox, automatically share it in the specified Slack channel.



Incident Management and Collaboration

When an incident is reported in Jira, automatically notify the relevant Slack channel for incident remediation.

Discover How to Maximize Iguana's Potential Beyond Healthcare

Leveraging Iguana's versatility to automate common business workflows and tasks



REGAAH RAGUNATHAN SALES ENGINEER

Discover How to Maximize Iguana's Potential Beyond Healthcare

WHAT WE WILL COVER:

- **Identifying Common Business Workflows**
- **Automating these Workflows with Iguana**
- **How to Get Started**
- **Case Studies: See Iguana in Action!**

Batch Processes

Internal Databases

iguana 

Files and File Systems

APIs

Batch Processes

HEALTHCARE SYSTEMS



Internal Databases



APIs

Files and File Systems



SOFTWARE APPLICATIONS

Batch Processes

Internal Databases

Files and File Systems



FILE & DATA STORAGE



ACCOUNTING SOFTWARE



PROJECT MANAGEMENT SOFTWARE



CRMs

APIs



NOTIFICATIONS

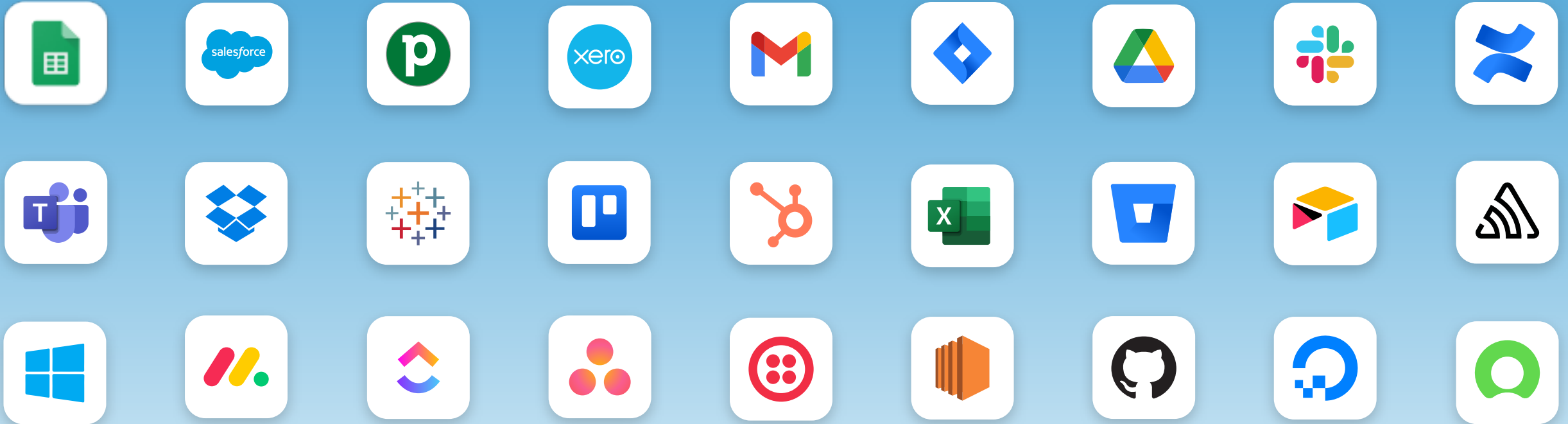
Common Software Applications

Which Ones Are Used By Your Organization?



Common Software Applications

Which Ones Are Used By Your Organization?



Siloed Data: A Common Challenge

How do you access essential information when it's spread out?

Sales & Accounting



Support



Project Management



IT Operations



POLL 1:

How much time do you lose to repetitive, manual tasks?

A little bit

Most of our processes are automated

Moderate

We have several repetitive, manual workflows that don't affect project timelines whatsoever

Substantial

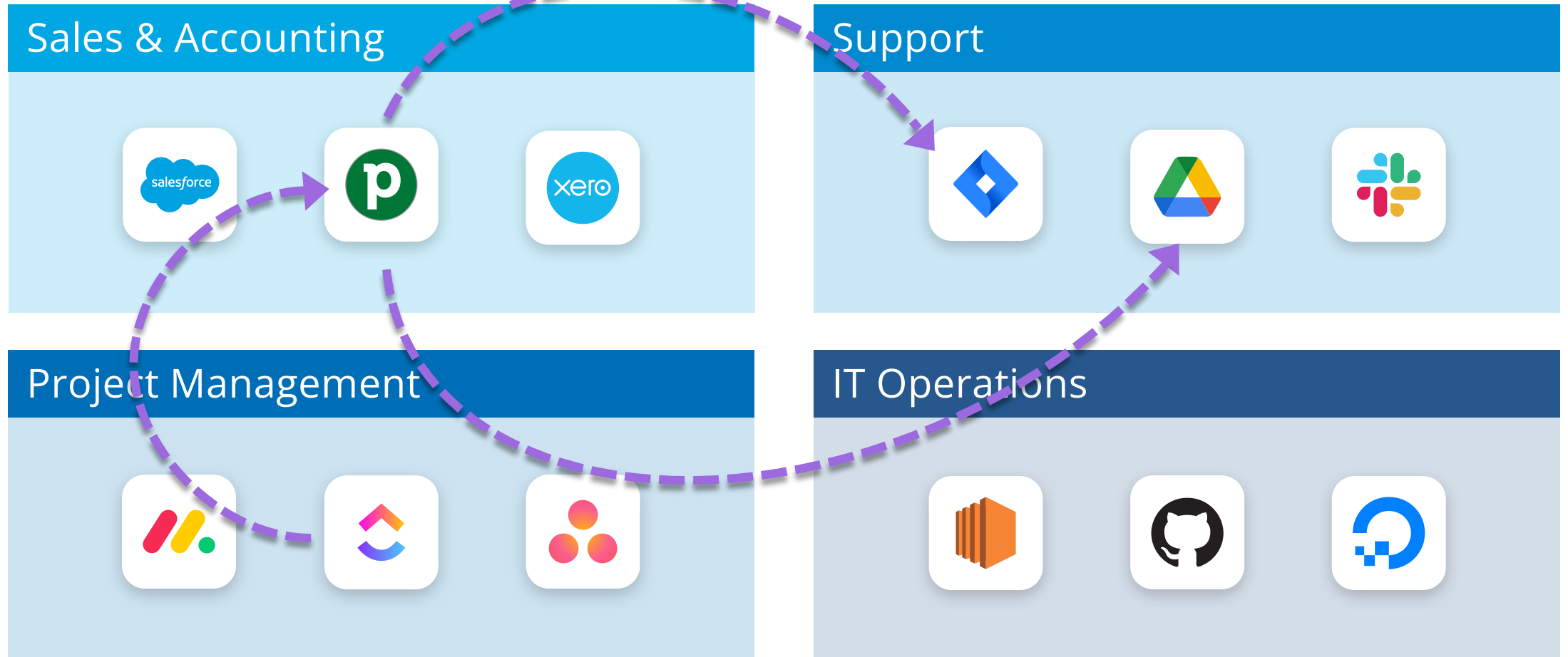
We spend substantial time/resources on manual workflows but meet goals most of the time

Too much

We struggle to meet project timelines or manage our priorities due to repetitive, manual tasks

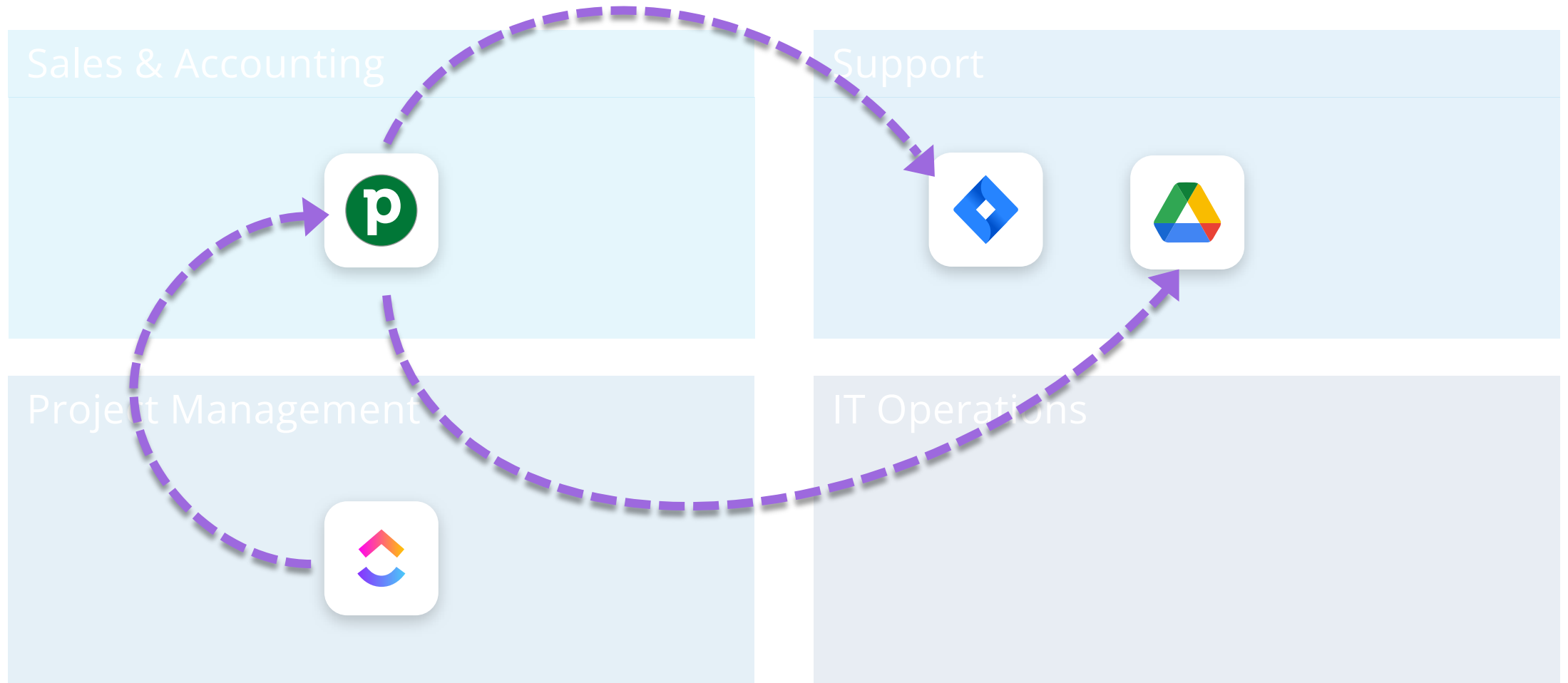
For Example...

Professional Services (**Clickup**) > Sales Account Managers (**Pipedrive**) > Relevant Tickets/Documents (**Jira/Google Drive**)

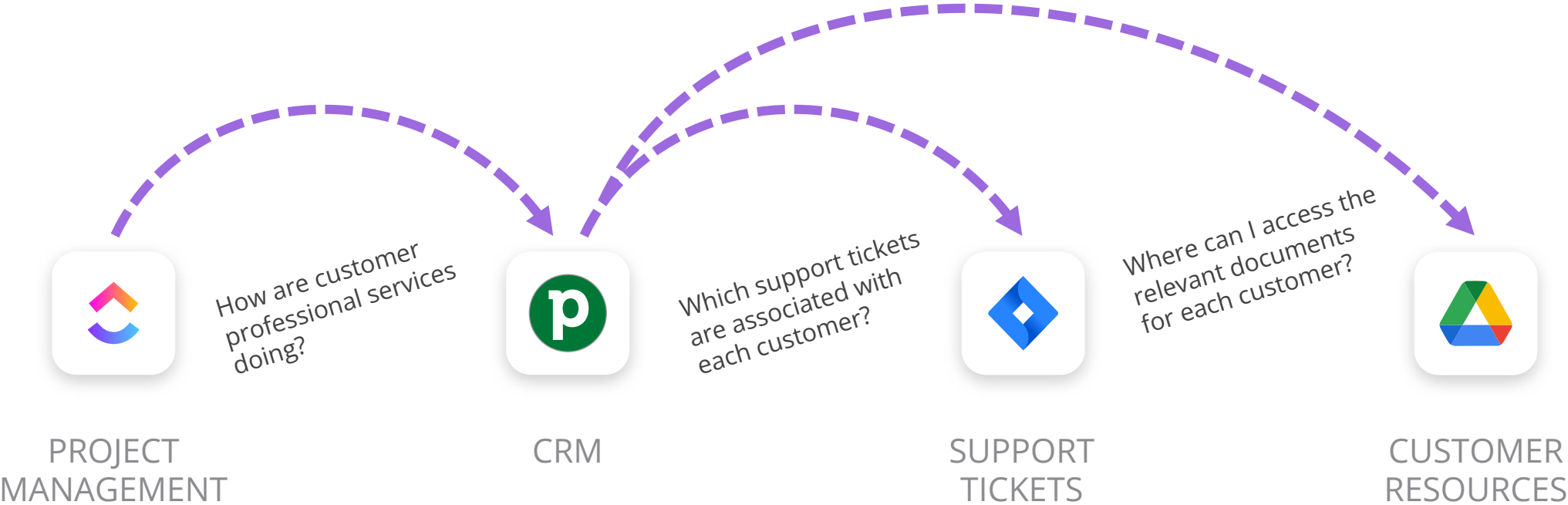


For Example...

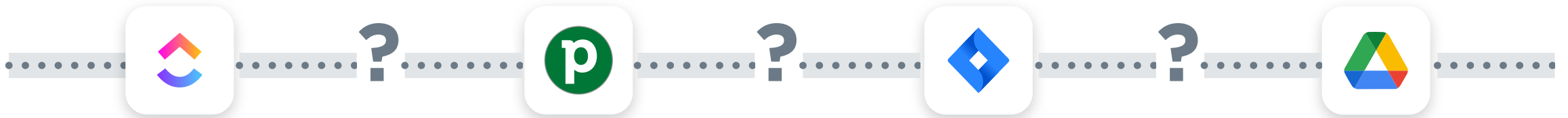
Professional Services (**Clickup**) > Sales Account Managers (**Pipedrive**) > Relevant Tickets/Documents (**Jira/Google Drive**)



Example Workflows: In Detail



How does data get from one application to the other?



The Problems With Manual Data Transfer:

- ⊗ Requires access to **multiple systems**
- ⊗ Process is **slow and tedious**
- ⊗ Data integrity is **prone to errors**
- ⊗ Not efficient due to **delayed updates**

POLL 2:

How frequently do you encounter issues due to manual data transfer?

Rarely

We rarely (if ever) encounter issues

Occasionally

We have occasional issues, but they are manageable

Frequently

We frequently encounter issues that can keep us from meeting **SOME** goals

Very Frequently

We are weighed down by fixing issues all the time and unable to meet our goals

Constantly

We are concerned about data accuracy **AND/OR** our current system doesn't work

Automating Workflows

How can you save time and work more efficiently?

“Built-In” or 3rd Party Automation

- Limited workflow options
- Limited integration options
- Additional integration software requires additional costs



Benefits of using Iguana

- Capable of complex workflows
- Flexible integration options
- No additional software or training costs
- Potential for reusability



Automating Workflows: How to Get Started

IDENTIFYING THE GAPS

NEEDS

- What is the “big picture” you are trying to see?
- What are the pain points?

DATA

- What data do you need to collect?
- Where is the data stored?
- How is the data stored?

WORKFLOW

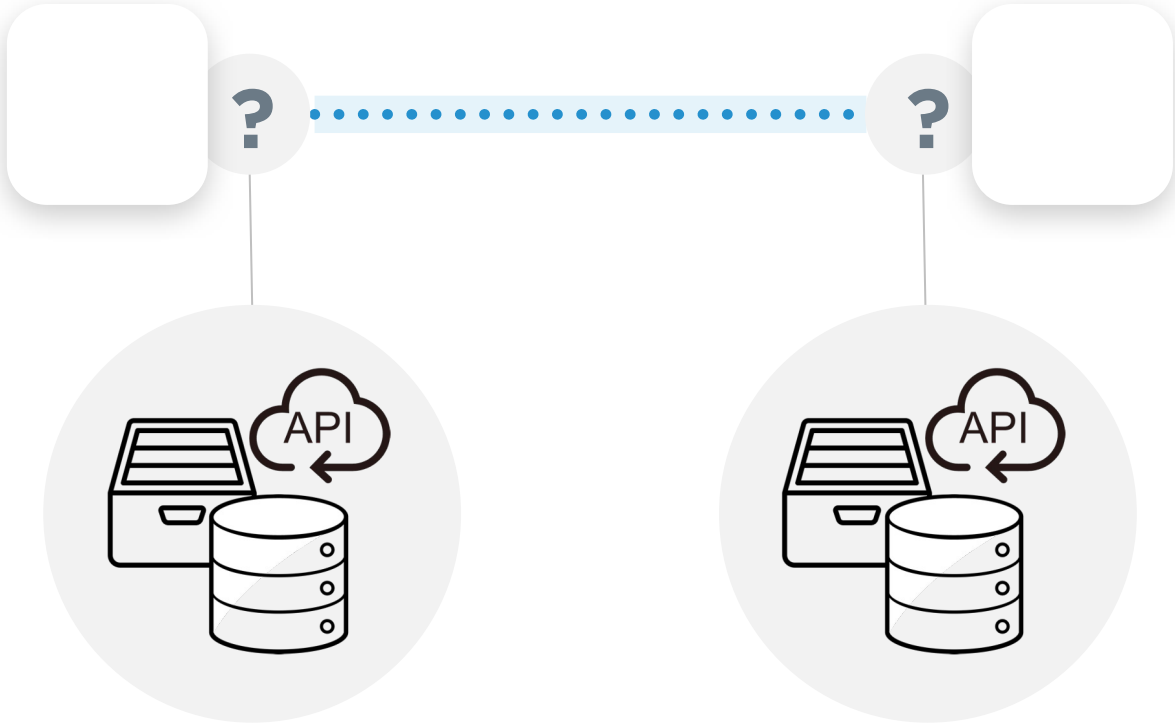
- When do you need this data?
- How frequently do you need it?
- Who needs to access or be notified about this data?

Automating Workflows: How to Get Started

BUILDING THE INTERFACE

COMMON CONNECTIONS

- API
- Files
- File Systems
- Databases



Building the Automation Interface

API STRATEGIES

Building the Automation Interface

API STRATEGIES

1. API Documentation

The screenshot shows a developer portal for 'p DEVELOPERS'. The top navigation bar includes 'Docs & guides', 'Explore', 'Tools', and 'Marketplace'. A search bar is present with the text 'Search for endpoints'. The main content area is titled 'API Reference' and has a sub-section 'Getting started'. Below this, there is a list of 'Endpoints' including 'Activities', 'ActivityFields', 'ActivityTypes', 'Billing', and 'CallLogs'. The right side of the page shows the start of an 'API Reference' section with the text: 'This reference helps you implement the RESTful Pipe (Resource Sharing) requests. The API is stateless – all app.' and a 'Run in Postman' button.

The screenshot shows the 'athenahealth API Solutions' documentation page. The top navigation bar includes 'Getting Started', 'Documentation', 'Sandbox', and 'Support'. The main content area is titled 'Book appointment' and shows the endpoint: `PUT /v1/{practiceid}/appointments/{appointmentid}`. Below this, there is a description: 'Create a single appointment for specific patient' and two buttons: 'Try in Sandbox' and 'Try in Postman'. The 'Input Parameters' section is titled 'required' and contains a table with the following data:

Parameter	Type	Description
practiceid	integer	practiceid
appointmentid	integer	appointmentid
Content-Type	string	Content type of the payload

Building the Automation Interface

API STRATEGIES

1. API Documentation

2. Authentication & Security

```
local response, status = net.http.post{url="http://localhost:6544/Test",  
  headers={['Content-Type']='application/json',  
    ['Authorization']='bearer'..token},  
  body=MsgBody,  
  live=true}
```

Building the Automation Interface

API STRATEGIES

1. API Documentation

2. Authentication & Security

3. Build your API Tools

- Complexity depending on scalability

```
10  function apiCall(fcn,params)
11      -- Load basic auth
12      params.auth = {
13          username = cfg.test.username,
14          password = cfg.test.password
15      }
16      -- Call API
17      local status, response, code = pcall(retry.call,{
18          func = fcn,
19          arg1 = params,
20          retry = cfg.test.retry,
21          pause = cfg.test.pause,
22      })
23  )
24  end
```


Building the Automation Interface

API STRATEGIES

1. API Documentation
2. Authentication & Security
3. Build your API Tools
 - Complexity depending on scalability



Building the Automation Interface

API STRATEGIES

1. API Documentation

2. Authentication & Security

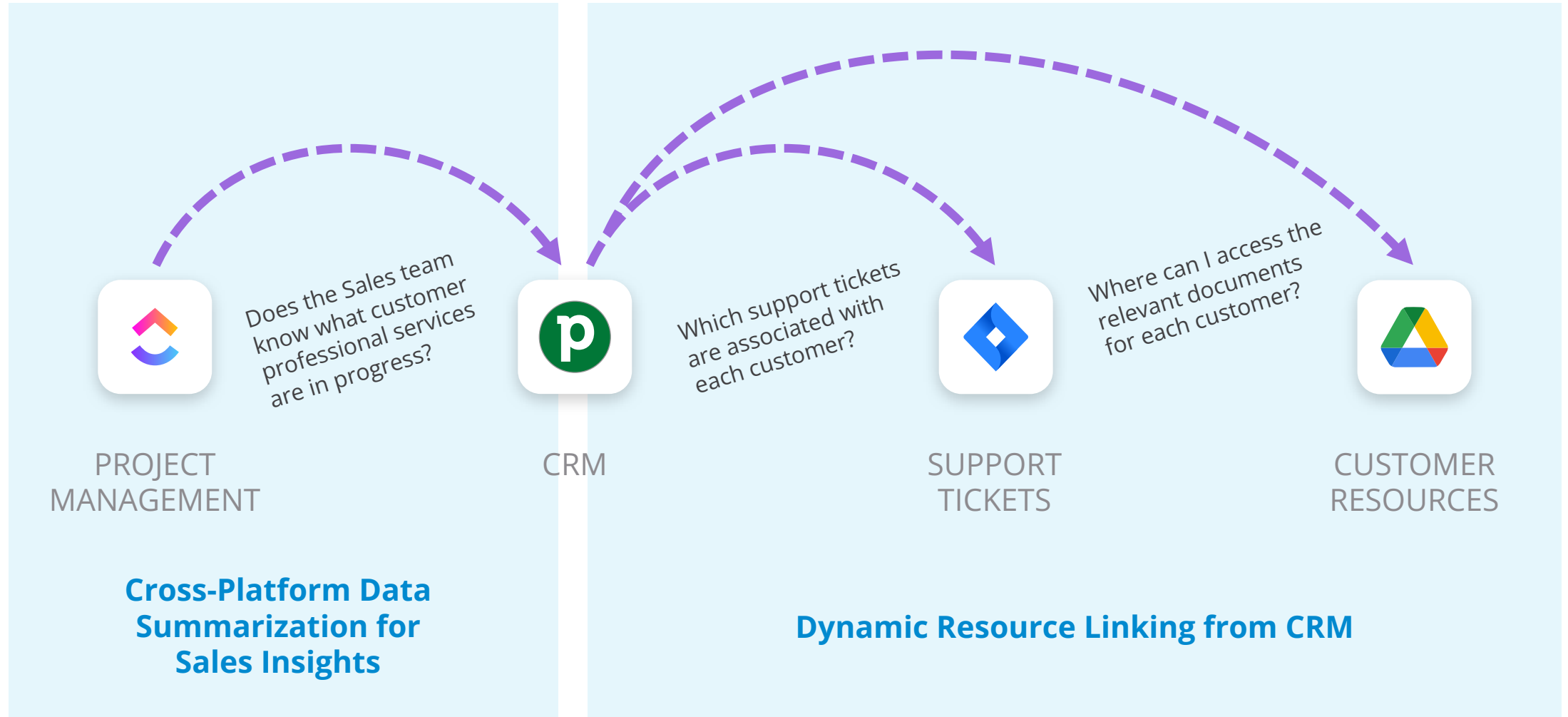
3. Build your API Tools

- Complexity depending on scalability

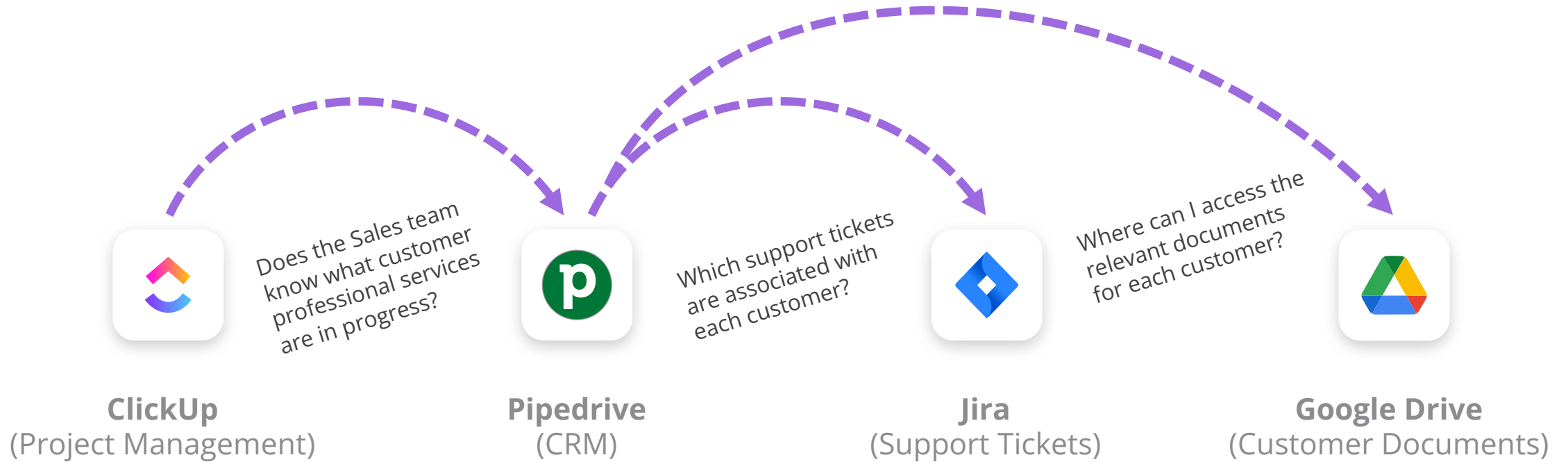
4. Testing & Performance

```
28  -- SEND A POST REQUEST
29  local response, status = post(DataOut)
30
31  -- HANDLE RESPONSE
32  if status == 200 then
33      iguana.logDebug("Request successful: " ..
34          response .. " (" .. status .. ")")
35  else
36      iguana.logDebug("Request unsuccessful: " ..
37          response .. " (" .. status .. ")")
38      retry.call{func=post, retry=20, pause=30}
39  end
40
```

Recall These Example Workflows?



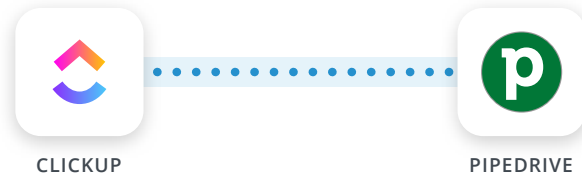
They're Real!



We use Iguana to automate these exact workflows at **iNTERFACEWARE**

We'll Show You How Each One Is Done:

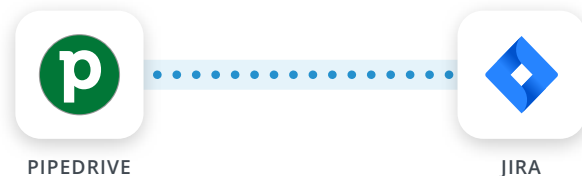
Cross-Platform Data Summarization for Sales Insights



Daily Professional Services Updates

WORKFLOW: Daily scan in ClickUp for professional services rendered, to provide the sales team with updates in Pipedrive on each customer.

Dynamic Resource Linking in CRM



Customer Support Tickets Integration

WORKFLOW: Auto-generate links in Pipedrive to access and view all customer-related support tickets in Jira at a glance.



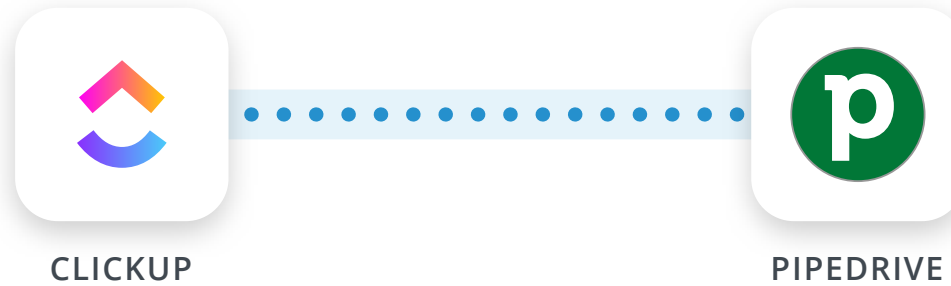
Auto-generate Links to Customer Documents

WORKFLOW: Automatically generate links in Pipedrive to relevant documents for each customer in Google Drive.

Demo 1: Clickup to Pipedrive

Daily Professional Services Updates

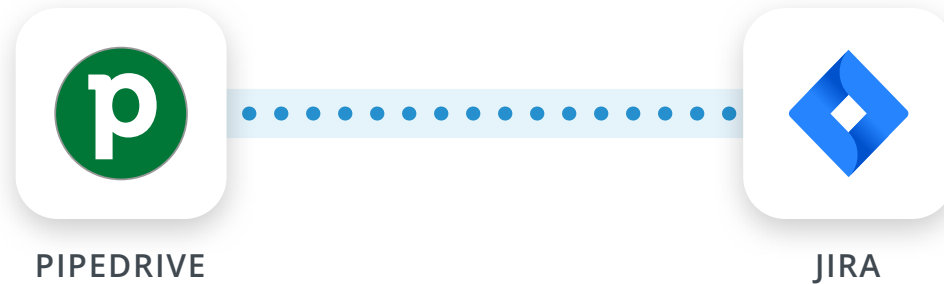
WORKFLOW: Daily scan in ClickUp for professional services rendered, to provide the sales team with updates in Pipedrive on each customer.



Demo 2: Pipedrive to Jira / Google Drive

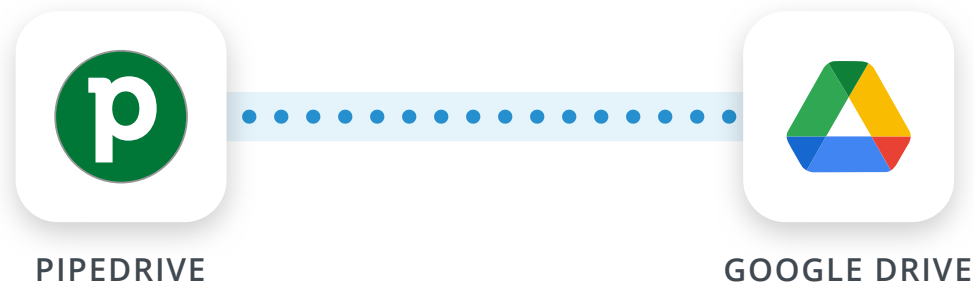
Customer Support Tickets Integration

WORKFLOW: Auto-generate links in Pipedrive to access and view all customer-related support tickets in Jira at a glance.



Auto-generate Links to Customer Documents

WORKFLOW: Automatically generate links in Pipedrive to relevant documents for each customer in Google Drive.



Thank You

Any Questions?

