

relay

The screenshot displays the Relay app interface, which is designed for managing workflows. The main window is titled "Demo Requests" and features a sidebar with navigation icons. The workflow is organized into three tabs: "Run", "Playback", and "Activity".

The "Run" tab is active, showing a sequence of steps in a workflow:

- Step 1: "When a new **demo request** is submitted" (Trigger)
- Step 2: "Create a copy of **CRM Lead** - Demo Meeting" (Action)
- Step 3: "Create lead in HubSpot for **CRM Lead**" (Action)
- Step 4: "Send confirmation email to **CRM Lead**" (Action)
- Step 5: "When a new **demo request** is submitted" (Trigger)
- Step 6: "Write up demo notes" (Action)
- Step 7: "Send a summary to **CRM Lead**" (Action)

A pop-up window titled "Send a message" is overlaid on the right side of the screen, showing a preview of a message being sent to a contact named "CRM Lead". The message content includes:

- A greeting: "Hi **CRM Lead**, just finished up a demo with **CRM Lead**."
- A section titled "Here's a summary" with a link to "Summary Meeting Notes".
- A section titled "Follow up items" with a link to "Sales Rep. Add follow-up items".

At the bottom of the pop-up window, there are buttons for "Preview", "X", and "Done".

Relay An Information Management Workflow

Arturo Cuomo



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