



dream-genie.ai

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AI Flows & Automation

Complete guide to the visual workflow builder with 50+ action types, 10 triggers, SaaS connectors, and AI-powered automation.

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1 What Are AI Flows?

AI Flows are visual workflow automations that run inside WordPress — like Zapier or n8n, but native to your site and supercharged with AI. A flow consists of a **trigger** (what starts it) connected to a chain of **actions** (what it does).

Use cases:

- When a blog post is published → AI generates social media posts → posts to Twitter, LinkedIn
- When a WooCommerce order is placed → AI writes a personalized thank-you email → sends via Gmail
- When a form is submitted → AI scores the lead → adds to HubSpot → notifies Slack
- On a daily schedule → AI generates a blog post → publishes as draft → emails editor for review
- When a comment is posted → AI analyzes sentiment → auto-approves positive, flags negative

■ **NOTE:** Flows are available on all plans. Free: 3 flows, 50 runs/month. Starter: 10 flows, 500 runs. Pro: 50 flows, 5,000 runs. Agency: Unlimited.

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The Visual Flow Builder

The flow builder is a drag-and-drop canvas where you design workflows visually. Nodes represent triggers and actions; edges (lines) show the execution path.

Builder Controls

Control	Action
Click + Drag on canvas	Pan the workspace
Scroll wheel / Pinch	Zoom in/out
Click a node	Select it and show its settings panel
Drag from a node's output port	Draw a connection to the next node
Click an edge	Select it (press Delete to remove)
+ Add Node button	Opens the action palette to add a new node
Save button	Saves the flow (auto-creates a version snapshot)
Test Run button	Executes the flow with sample data
Toggle Active/Inactive	Enable or disable the flow from running on triggers

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Triggers

Every flow starts with exactly one trigger. Available trigger types:

Trigger	Fires When	Data Available
Form Submission	An AI Form is submitted	All form fields, user info
WooCommerce Order	A new order is placed	Order details, products, customer
Post Published	A post/page is published or updated	Post title, content, author, categories
User Registration	A new user registers	Username, email, role
Comment Posted	A new comment is submitted	Comment text, author, post
Incoming Webhook	An external HTTP POST hits your webhook URL	Full JSON payload
Scheduled / Cron	At a specific time or interval	Current timestamp, iteration count
Manual Trigger	You click 'Run' in the admin	Any test data you provide
Custom WP Hook	A WordPress action or filter fires	Hook arguments
Chatbot Message	A chatbot conversation event	Message text, session, user info

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AI-Powered Actions

These actions call your configured AI provider to process data:

Action	What It Does	Example
AI Generate Content	Sends a prompt to AI and returns generated text	Generate blog post from topic
AI Summarize	Condenses long text into a summary	Summarize customer feedback
AI Translate	Translates text to another language	Translate product descriptions
AI Agent Decision	AI analyzes data and chooses the next step	Route support ticket to department
AI Image Generation	Generates an image from a text prompt	Create featured image for blog post

■ **NOTE:** AI actions use your API keys at your provider's rates. Token usage is tracked per-flow-run in the execution log.

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Standard Actions

Action	Description
Send Email	Send an HTML email via WordPress <code>wp_mail()</code> or SMTP
Create Post	Create a WordPress post, page, or CPT with fields from the flow
Update Post	Modify an existing post's title, content, status, or meta fields
Update User Meta	Set custom meta values on a WordPress user
HTTP Webhook Out	Send an HTTP POST/GET to any external URL with custom payload
Fire WP Action	Trigger a custom WordPress action hook (<code>do_action</code>)
Delay / Wait	Pause execution for a specified duration (seconds, minutes, hours)
Set Variable	Create or modify a flow variable for downstream actions
Log Message	Write a message to the flow execution log (debugging)

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AI Intelligence Actions

Advanced AI actions introduced in v1.3:

Action	What It Does
AI Pipeline	Chain multiple AI operations sequentially (like Unix pipes)
AI Classify	Categorize input into predefined classes (smart routing)
AI Transform	Reshape data from one format to another (JSON ↔ CSV, etc.)
AI Sentiment	Analyze emotional tone (positive/negative/neutral + score)
AI Extract	Pull structured data from unstructured text (names, dates, amounts)
AI Code Generator	Generate code snippets from natural language descriptions
AI Validate	Check data against rules and return pass/fail with reasons
AI Smart Retry	Re-attempt failed AI calls with modified prompts

7 Flow Control

Advanced flow orchestration features:

Sub-Flows

Reusable flow modules. Create a flow once, then call it from other flows as a single node. The sub-flow runs with the calling flow's variables and returns its output.

Parallel Branches

Fan-out: split execution into multiple parallel paths. Fan-in: wait for all branches to complete, then continue. Use for tasks like 'generate content in 3 languages simultaneously.'

AI Memory

Persistent key-value storage that survives across flow runs. Store data in one run, retrieve it in a later run. Use for tracking state, counters, or accumulated data.

- **Set Memory** — store a value with a key: `memory.set('total_leads', 42)`
- **Get Memory** — retrieve: `memory.get('total_leads') → 42`
- **Increment** — atomic counter: `memory.increment('post_count')`

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Conditional Logic

If/Else nodes let you branch flow execution based on conditions. Connect the True and False outputs to different action chains.

Operator	Description	Example
equals	Exact match (case-sensitive)	status equals 'completed'
not_equals	Does not match	role not_equals 'admin'
contains	String includes substring	email contains '@gmail'
not_contains	String excludes substring	message not_contains 'spam'
starts_with	String begins with	name starts_with 'Dr.'
ends_with	String ends with	email ends_with '.edu'
greater_than	Numeric comparison	order_total greater_than 100
less_than	Numeric comparison	items less_than 5
is_empty	Field has no value	phone is_empty
is_not_empty	Field has a value	coupon_code is_not_empty
regex	Regular expression match	zip regex '^d{5}\$'

9 Loops & Iterators

Loop nodes process arrays item-by-item. Useful for processing multiple products, users, or records in a single flow run.

- Input: an array variable (e.g., `{{trigger.products}}`)
- The loop body executes once per item
- Inside the loop, `{{loop.item}}` refers to the current item
- `{{loop.index}}` is the current iteration (0-based)
- Results are collected into an output array

10 Variables & Data Passing

Data flows between nodes using the template syntax `{{source.field}}`. Every node's output becomes available to all downstream nodes.

Syntax	Resolves To
<code>{{trigger.email}}</code>	The email field from the trigger event
<code>{{node_3.content}}</code>	The output of node 3 (by node ID)
<code>{{ai_generate.result}}</code>	The generated text from an AI Generate action
<code>{{loop.item.name}}</code>	The 'name' property of the current loop item
<code>{{memory.total}}</code>	A value from persistent AI Memory
<code>{{env.site_url}}</code>	Your WordPress site URL

11 SaaS Connectors

10 native SaaS integrations — no webhook workarounds needed:

Service	Actions Available
Google Sheets	Append row, read row, update row, create sheet
Slack	Send message (with blocks), post to channel, DM user
Mailchimp	Add subscriber, update subscriber, add/remove tags
HubSpot	Create/update contact, create deal, add to list
Airtable	Create record, update record, list records, search
Google Drive	Upload file, create doc, share file
Gmail	Send HTML email, send with attachments
Twilio	Send SMS, send WhatsApp message
Discord	Send webhook message, send embed
Notion	Create page, update page, query database

■ **TIP:** Each connector has a credential management UI and connection testing. Configure once, use in any flow.

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Human-in-the-Loop

Approval nodes pause flow execution and email a reviewer with Approve/Reject links. The links are HMAC-signed for security. On approval, the flow resumes from the paused point.

- Configure which email receives the approval request (per node)
- Set expiry time (1–720 hours) — auto-expire stale approvals
- Approved flows resume automatically within 60 seconds
- Rejected flows are marked as failed with the reviewer's note
- Approval history is logged with timestamps and reviewer info

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Pre-Built Templates

Template	What It Does
Content Pipeline	Trigger → AI Generate → Review → Publish → Social Share
Lead Scoring	Form Submit → AI Classify → Score → Add to CRM → Notify Sales
Comment Moderation	Comment Posted → AI Sentiment → Auto-Approve/Flag/Delete
WooCommerce Intelligence	Order Placed → AI Analyze → Personalized Follow-up Email
SEO Autopilot	Scheduled → AI Research Keywords → Generate Article → Publish

14 Execution Logging

Every flow run produces a detailed execution log:

- Step-by-step trace showing each node's input, output, and duration
- Token counts per AI action (for cost tracking)
- Error messages with full stack traces for failed steps
- Variable state at each step (for debugging data flow)
- Total execution time and status (done/failed/paused)

15 Async Background Queue

Long-running flows can be dispatched to a background queue instead of running in the HTTP request. Uses Action Scheduler (if available) or WP-Cron as fallback.

- Three priority levels: high, normal, low
- Automatic retry with exponential backoff (up to 3 attempts)
- Queue stats dashboard with bulk retry/purge controls

16 Versioning & Replay

- **Versioning** — automatic snapshot on every save (like WordPress post revisions). Revert to any version with one click.
- **Failed-Run Replay** — one-click replay of failed executions. Replay from start or from the failed step.
- **Flow Marketplace** — export flows as portable JSON, import from the template library.

17 Free Tier & Limits

Feature	Free	Starter	Pro	Agency
Flows	3	10	50	Unlimited
Runs/month	50	500	5,000	Unlimited
Actions per flow	5	15	50	Unlimited
Connectors	—	3	All 10	All 10
Approval nodes	—	—	✓	✓
Background queue	—	—	✓	✓
Multi-site sync	—	—	—	✓

18 Troubleshooting

Symptom	Cause	Fix
Flow never runs	Flow is inactive or trigger not configured	Toggle flow to Active; verify trigger settings
'Variable not found'	Referencing a node that hasn't run yet	Check node connections and execution order
AI action timeout	Long prompt or slow model	Increase PHP timeout or use background queue
Connector auth fails	Expired credentials	Re-authenticate in Settings → Connectors
Approval link expired	Reviewer took too long	Increase expiry or replay the failed run