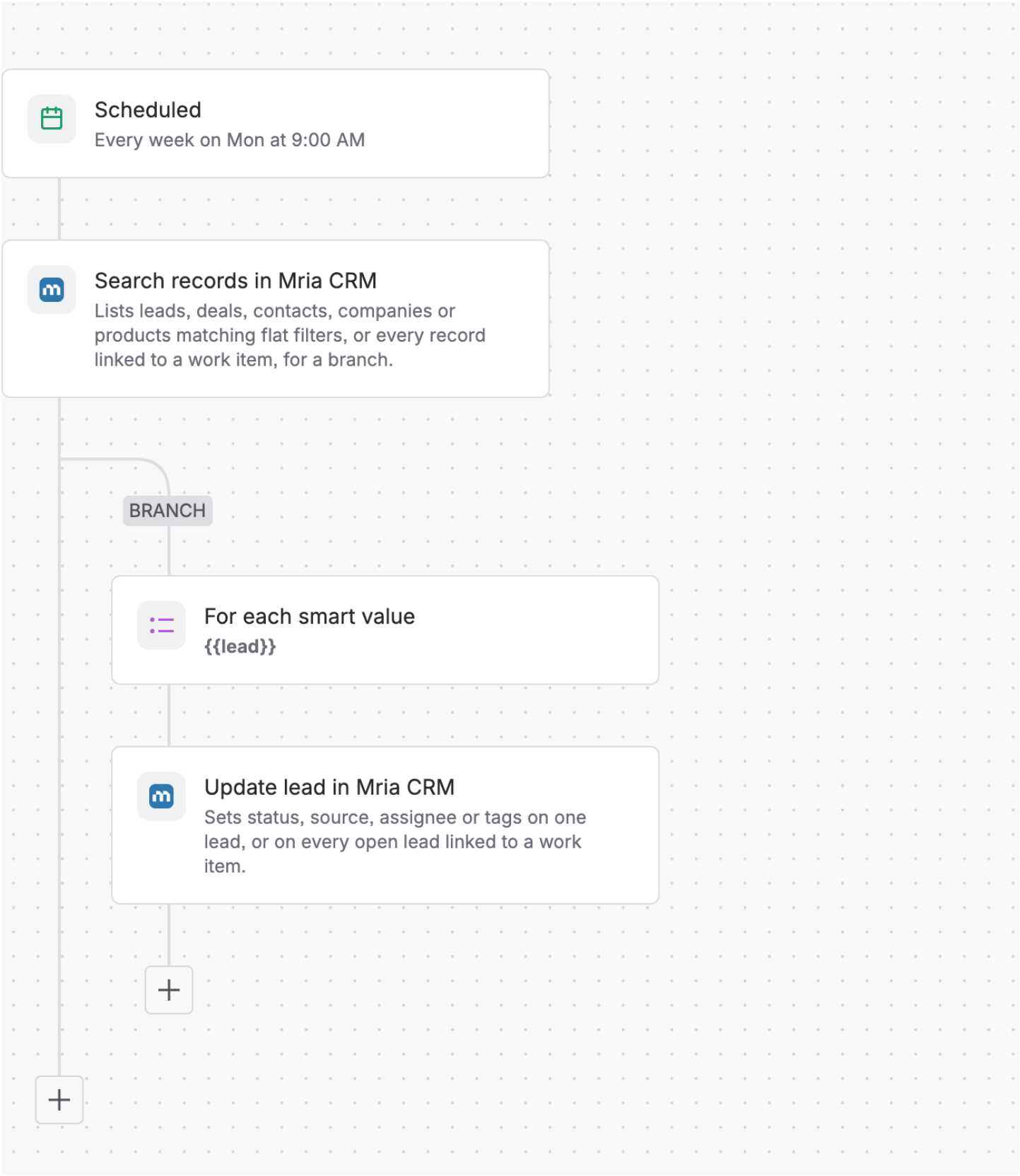
Scheduled Clean-up and Digests

Jira Automation · https://mriacrm.com/docs/scheduled-clean-up-and-digests/

A CRM that tidies itself every Monday

Scheduled flows need no work item and no person to start them. Paired with **Search records** and a branch, they find what nobody has looked at and act on every row: tag it, move it, or tell someone.

1. Tag stale new Leads every week



Trigger

Scheduled — Every week on Monday at 9:00 AM. No JQL: the flow is not about work items.

Search the Leads

Search records in Mria CRM:

Field	Value
Record type	Lead
Work item key	**empty**
Lead status	New
Updated before	`{{now.minusDays(30)}}`
Limit	50

Search records in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Record type *

Lead

"All" lists every record linked to the work item; lead status and stage filters do not apply, and tags leave out products

Work item key

Comma-separated keys; records linked to any of them. Leave empty to search by the other filters

Search term

Name, contact, company or email

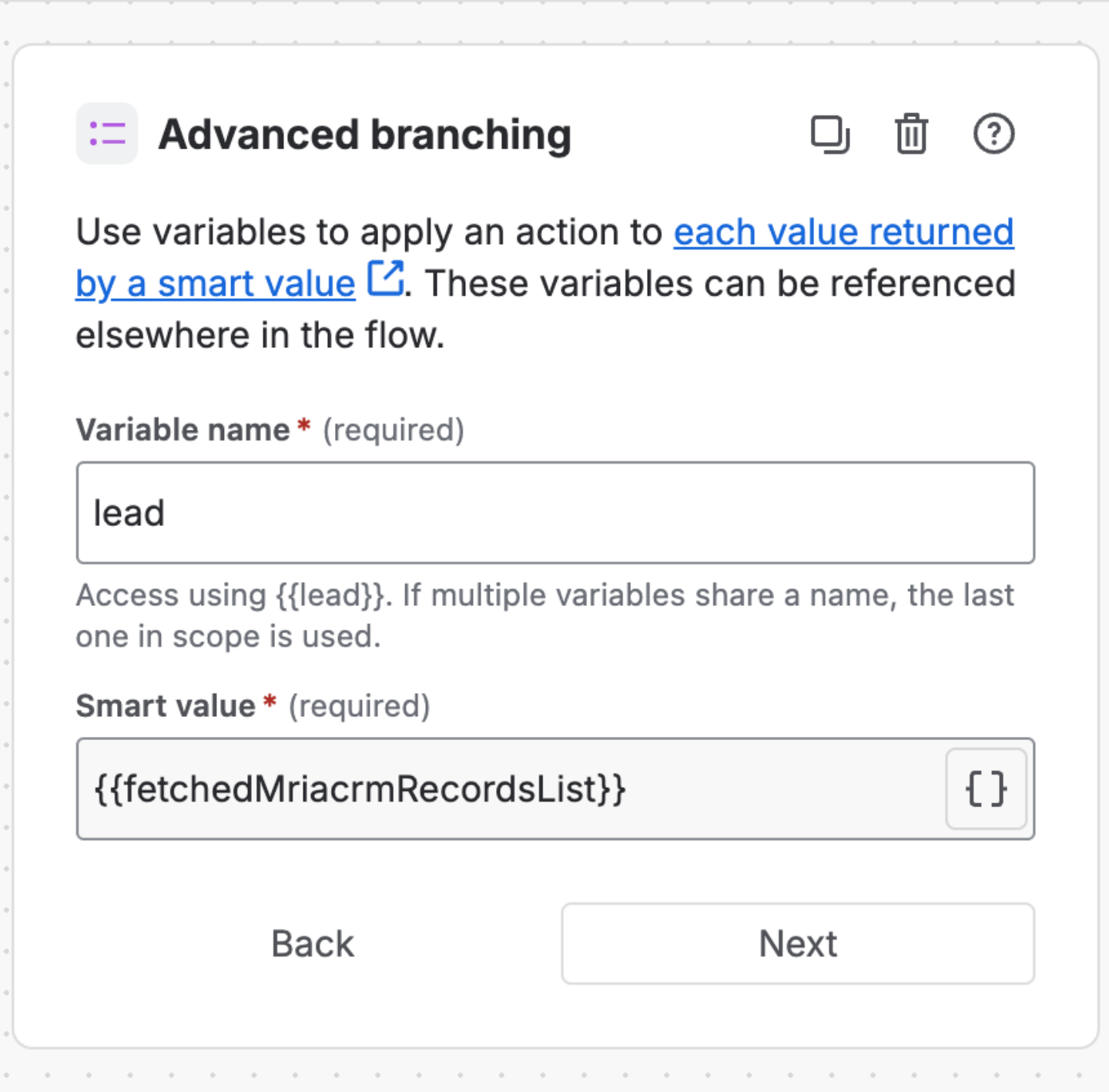
Lead status

New

Tags

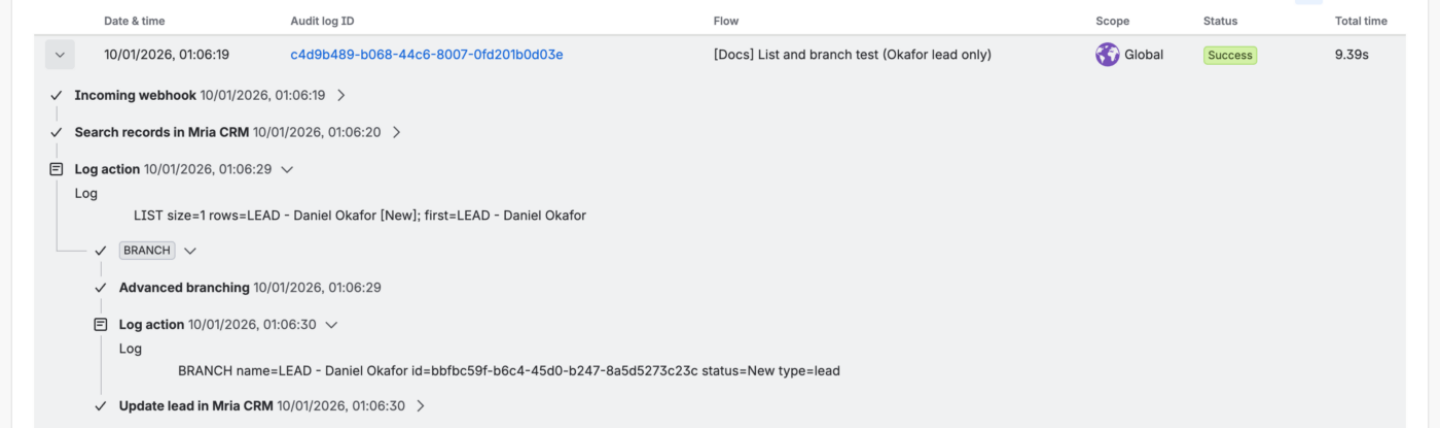
Tag each one

Add **Advanced branching** — Variable name `lead`, Smart value `{{fetchedMriacrmRecordsList}}`. Inside the branch, add **Update lead in Mria CRM** — One lead by id, Record id `{{lead.id}}`, Tags `Needs review`, Tags mode Add.



In the audit log, a run shows the search, then one pass through the branch per row. Here a test search returned one Lead; a Log action printed `{{fetchedMriacrmRecordsList.size}}` and the row

names, and the branch updated that Lead:



Result: every Lead still New after a month of silence carries a **Needs review** tag on Monday morning. Filter the Leads list by the tag, or put it on a dashboard.

> **Try it narrow first**
>
> A scheduled flow acts on everything the search returns. Before switching one on, run the search with an extra filter — a tag only a test record carries — and check the audit log.

2. Monday digest of Deals closing this week

1. **Trigger:** Scheduled, Mondays at 8:00 AM.
2. **Search records** — Record type Deal, Stage type Open, Closing date before `{{now.plusDays(7)}}`.
3. **Condition:** `{{fetchedMriacrmRecordsList.size}}` is greater than 0.
4. **Send email** or **Send Slack message**:

```
{{fetchedMriacrmRecordsList.size}} deals are due to close this week:
{{#fetchedMriacrmRecordsList}}
- {{name}}: {{amount}}, closing {{closingDate}} ({{url}})
{{/}}
```

The team starts the week with the Deals that need a push, without opening a dashboard.

3. Close long-overdue Deals as Lost

1. **Trigger:** Scheduled, daily.

2. **Search records** — Record type Deal, Stage type Open, Closing date before `{{now.minusDays(30)}}` .
3. **Advanced branching** over `{{fetchedMriacrmRecordsList}}` as `deal` .
4. **Update deal** — One deal by id, `{{deal.id}}` , Stage Lost, Loss reason No Response.

The pipeline stays honest. A Deal without an amount cannot be closed and fails its own branch run; the others still close.

4. Things to know about scheduled searches

- Search records returns at most 150 rows per run, most recently updated first. A larger backlog clears over several runs.
- Each row updated in a branch is one more step toward your automation usage. A weekly sweep is usually plenty.
- The search sees what the connection owner may see. A sweep owned by someone with a narrow role sweeps less.
- Tags set by a flow are ordinary tags: rename or delete them in Settings like any other.

Related Pages

- Automation Actions Reference — Search records' filters and list output.
- Leads — filtering the list by tag.
- Dashboard — Stale records and Deals closing soon widgets, for the same questions without a flow.