



Workflow Scenario Example 11

Type: Recurring Notification
Department: CRM

November 30th, 2019
© agiles Gruppe 2019

agiles Informationssysteme GmbH
Kurze Mühren 2 – 4
20095 Hamburg, Germany

Phone: +49 (40) 30 95 33 - 0
Fax: +49 (40) 30 95 33 - 75
workflow@agiles.com
www.agilesWorkflow.com

Learning Objectives

Conditional Responsibilities

It is possible to connect specific To-Dos to specific employees using the conditions.

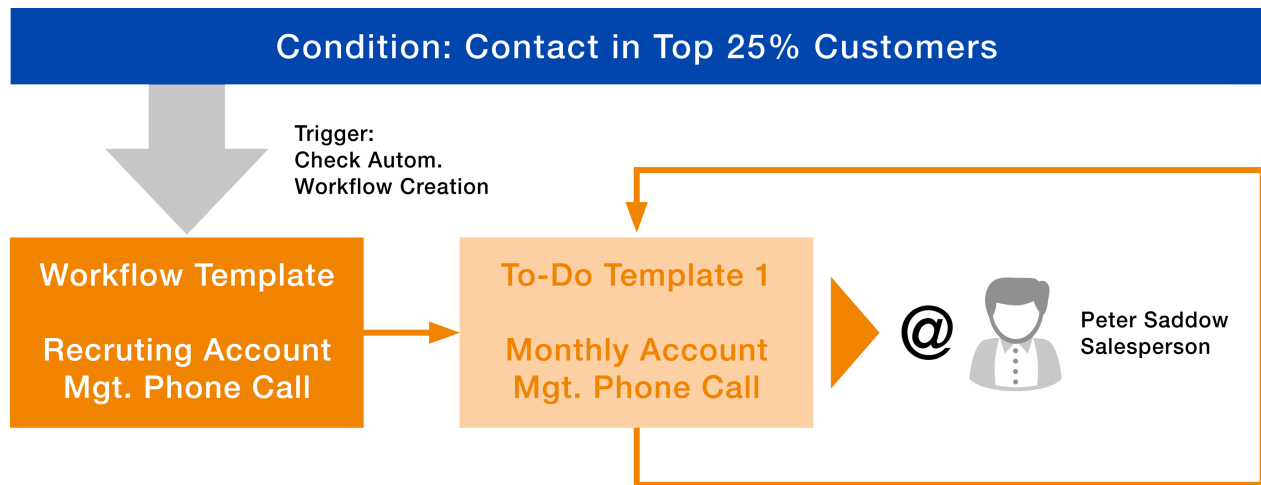
Recurring To-Do

Furthermore, it is possible to define a task as being repeated after a specific period of time.

Business Process “Monthly Phone Call Alert“

The most important costumers of the company are contacted monthly by the Sales Manager, who is in charge of (he will be reminded by an alert system).

agilesWorkflow Diagramm



agilesWorkflow Setup

Reference Type

No.: 5050 (Contact)
Editing Form ID: 5050 (Contact Card)
Buffer Time on Function Call Server: 30 Seconds
Automatic Workflows: Yes
Keyword Definitions:
 Tick all Use Fields
 Table ID: 5050 (Contact)
 Keyword Definitions Line 1
 Field ID: 2 (Name)
 Keyword Definitions Line 1
 Field ID: 9 (Phone No.)

Table Join

Table ID: 5050 (Contact)
Table ID to join: 5089 (Contact Profile Answer)
 Table Join Line 1
 Field ID: 1 (Contact No.)
 Field Value: Field
 Value: 1 (No.)

To-Do Template

To-Do Template 1	<p>Reference Type No: 5050 (Contact) Code: WF110-TD010 Description: Monthly Account Mgt. Phone Call</p>
WHO	<p>Employee Code: PS Conditional Responsibility based on Salesperson</p> <p>Conditional Responsibilities</p> <p>Conditional Responsibilities Line 1 Condition Code: WF110-C010</p> <p>Condition</p> <p>Table ID: 5050 (Contact) Code: WF110-C010 Description: Salesperson John Roberts Type: Responsibility Condition Line 1 Active: Yes Type: Field Table ID: 5050 (Contact) Field ID: 29 (Salesperson Code) Filter: JR Employee Code: JR</p> <p>Conditional Responsibilities Line 2 Condition Code: WF110-C020</p> <p>Condition</p> <p>Table ID: 5050 (Contact) Code: WF110-C020 Description: Salesperson Linda Martin Type: Responsibility Condition Line 1 Active: Yes Type: Field Table ID: 5050 (Contact) Field ID: 29 (Salesperson Code) Filter: LM Employee Code: LM</p>
WHY	No Activation
WHEN	<p>Source Type: Workflow Duration Date Calculation: 2D Duration Date Calculation: -1D Recurring: Yes Recurring Date Interval: 1M Calc. Due Date from: Closing Date</p>
WHAT	Type: Manual Completion

Workflow Template

Reference Type: 5050 (Contact)

Code: WF110

Description: Monthly Account Mgt. Phone Call

Use Condition: WF110-C030

Condition

Table ID: 5050 (Contact)

Code: WF110-C030

Description: Top 25% Costumer

Type: Workflow Template Use

Condition Line 1

Active: Yes

Table ID: 5089 (Contact Profile Answer)

Field ID: 5 (Answer)

Filter: Top 25% Costumer

[Warning: Lookup not possible, need to be copied from the profile questionnaire]

Workflow Line 1

Type: To-Do

Code: WF110-TD010