



Workflow Scenario Example 18

Type: Recurring Notification
Department: Sales (Customer Ledger Entries)

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Learning Objectives

Multi Line Examination:

A Workflow can be executed on a Master Table (Header Table) and is able to accomplish examinations through sub tables (Line Table). This e.g. helps to find out, if a particular amount out of all lines has been reached. For this purpose, setups conforming a FlowField are established. The possible options available are: Sum, Count, Exist, Minimum, Maximum and Average.

In this case we will use the option "Maximum", in order to determine the latest date of a given record set.

Business Process „Notification on Inactive Customer“:

The Sales Manager is to be notified, when a customer has made no turnover for more than half a year.

Therefore it will be checked, if the customer has ledger entries at all. And if so, then it will be checked, if the latest of these ledger entries is older than half a year.

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agilesWorkflow Setup

Reference Type

No.: 18 (Customer)
 Editing Page ID: 21 (Customer Card)
 Buffer Time on Function Call Server: 10 Seconds
 Automatic Workflows: Yes
 Keyword Definitions Line 1

Table ID: 18 (Customer)
 Field ID: 1 (No.)
 Tick all Use Fields

Keyword Definitions Line 2

Table ID: 18 (Customer)
 Field ID: 2 (Name)
 Tick all Use Fields

Table Join

Table ID: 18 (Customer)
 Table ID to Join: 21 (Customer Ledger Entry)
 Table Join Line 1

Field ID: 3 (Customer No.)
 Value Type: Field
 Value: 1 (No.)

To-do Templates

To-do Template 1	Reference Type No.: 18 (Customer) Code: WF180-TD010 Description: Customer Inactive for more than 6 Months
WHO	Employee Code: PS
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Manual Completion

Workflow Template

Reference Type No.: 18 (Customer)

Code: WF180

Description: Notification on Inactive Customer

Use Condition: WF180-C010

Additional: Yes

Condition

Table ID: 18 (Customer)

Code: WF180-C010

Description: Last Customer Ledger Entry older than 6 Months

Type: Workflow Template Use

All Condition Lines

Enabled: Yes

Type: Field

Table ID: 21 (Customer Ledger Entry)

Condition Line 1

Field ID: 1 (Entry No.)

Multi Line Check: Exist [eventually make column visible]

Filter: Yes

Condition Line 2

Field ID: 4 (Posting Date)

Wild Card Values

Wild Card No.: 1

Value Type: System Value

System Value: Workdate

Calculation Data Formula: -6M

Multi Line Check: Max

Filter: <%1

Workflow Line 1

Type: To-do

Code: WF180-TD010

Event Triggers [eventually make FastTab visible]

None [Uncheck all]