



Workflow Scenario Example 3

Type: Basic Notification
Department: Receivables (Customer)

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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

Critical Date Calculation

This is the field where the time frame of priorities is set, as soon as the given date (e.g. two days before the due date) is reached, the task is shifted and shown as “critical”.

Additive Use Condition

There is the possibility to trigger (condition) several Workflows in regards to one record data (e.g. New Customer Workflow + Over Credit Limit Workflow), it is called an Additive Use Condition. This condition is checked continuously to make sure a Workflow is triggered. That is important due to the fact that there is the chance of an already existing Workflow of the same reference type.

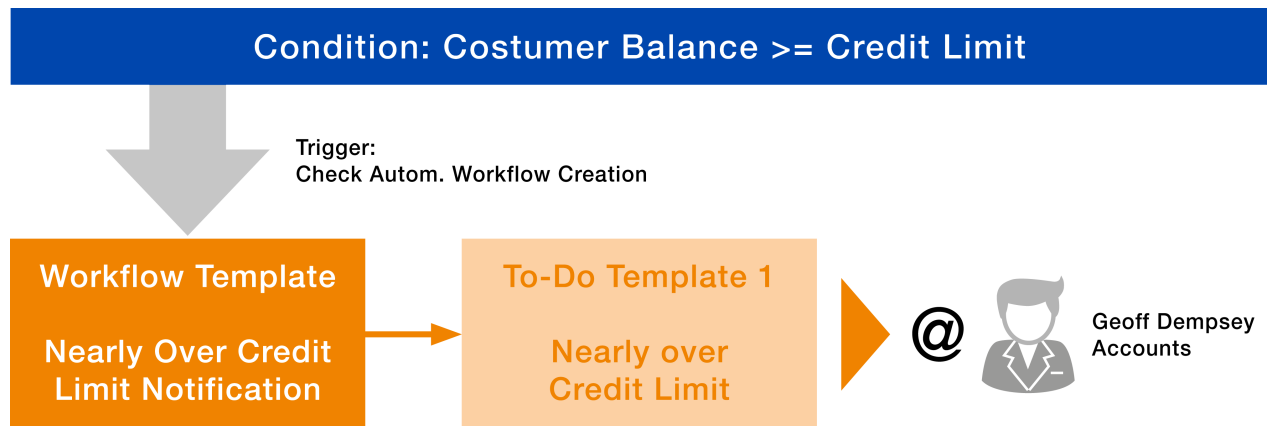
Wild Card (Calculation)

Wild Cards of the arithmetic operation can be used to calculate a field value based on a new value (e.g. - 10%) and to compare it with another.

Business Process “Customer nearly over Credit Limit“

When customers have approached 90 % of their balance, the accountant is notified by default in this matter. A notification will be sent out to warn the accountant concerning a potential violation of the customer’s credit limit.

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Reference Type

No.: 18 (Customer)
 Editing Page ID: 21 (Customer Card)
 Buffer Time on Function Call Server: 30 Seconds
 Automatic Workflows: Yes
 Keyword Definition Lines
 Tick all Use Fields
 Table ID: 18
 Tick all Use Fields
 Keyword Definitions Line 1
 Field ID: 1 (No.)
 Keyword Definitions Line 2
 Field ID: 2 (Name)

To-Do Template

To-Do Template 1	Reference Type No.: 18 (Customer) Code: WF030-TD010 Description: Customer nearly over Credit Limit
WHO	Employee Code: GD
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 7D Critical Date Calculation: -3D
WHAT	Type: Manual Completion

Workflow Template

Reference Type No.: 18 (Customer)
Code: WF030
Description: Nearly Over Credit Limit Notification
Use Condition: WF030-C010
Additional: Yes

Condition

Table ID: 18 (Customer)
Code: WF030-C010
Description: Nearly Over Credit Limit Notification
Type: Workflow Template Use
All Condition Lines
Active: Yes
Type: Field
Table ID: 18 (Customer)
Condition Line 1
 Field ID: 20 (Credit Limit (LCY))
 Filter: <0

Condition Line 2

Field ID: 59 (Balance (LCY))

Wild Card Values

Wild Card No.: 1

Value Type: Calculation

Field Value Table ID: 18 (Customer)

Field Value Field ID: 20 (Credit Limit (LCY))

Calculation Formula Value: $0,9 * \%1$ (show column)

Filter: $> \%1$

Workflow Line 1

Type: To-Do

Code: WF030-TD010