



Workflow Scenario Example 8

Type: Basic Process Workflow
Department: CRM

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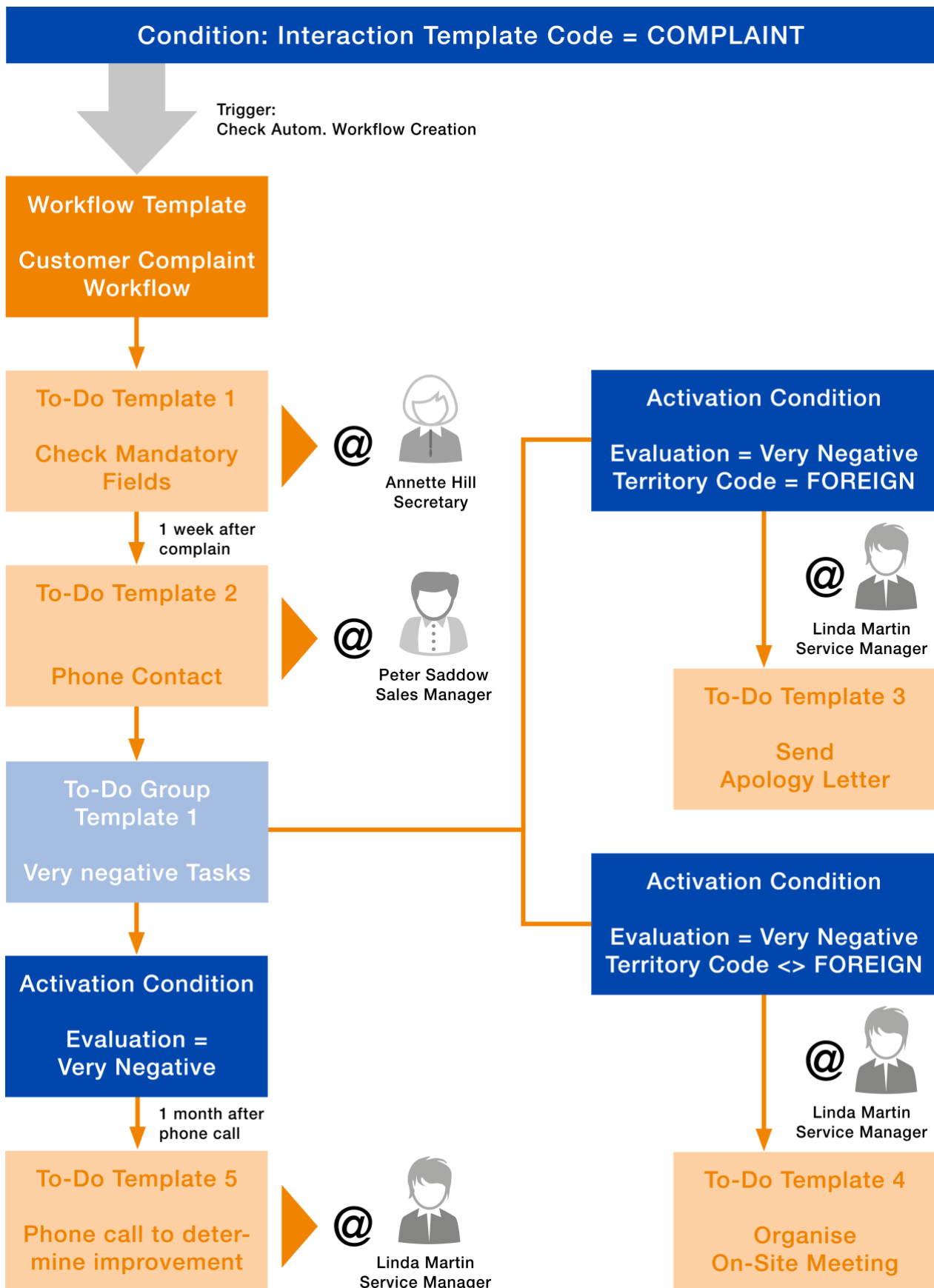
Learning Objectives

Consolidation of the learning objectives so far.

Business Process “Customer Complaint”

Once a customer complaint comes in, fields such as evaluation and comment has to be checked, it must be made sure that those fields are filled in. If this is the case, an employee will take further steps. One week (or more) after the complaint, the customer is contacted by an employee from the Purchase Team via telephone. If the evaluation turns out to be very adverse, the case is forwarded to a customer advisor. An Apologize Letter will be sent to foreign customers and a meeting will be arranged for in-country customers. To ascertain intended improvements, both customers again could be approached by phone after one month.

agilesWorkflow Diagramm



agilesWorkflow Setup

Table Join

Table ID: 5065 (Interaction Log Entry)

Table ID to join: 5050 (Contact)

Table Join Line 1

Field ID: 1 (No.)

Value Type: Field

Value: 3 (Contact Company No.)

Reference Type

No.: 5065 (Interaction Log Entry)

Editing Page ID: 5076 (Interaction Control Log Entry)

Buffer Time on Function Call Server: 30 Seconds

Automatic Workflows: Yes

Keyword Definition

Keyword Definitions Line 1

Table ID: 5065 (Interaction Control Log Entry)

Field ID: 3 (Contact Company No.)

Tick all Use Fields

Keyword Definitions Line 2

Table ID: 5050 (Contact)

Field ID: 5052 (Company Name)

Tick all Field Use

To-Do Template

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|------------------|--|
| To-Do Template 1 | Reference Type No.: 5065 (Interaction Control Log Entry) Code: WF080-TD010 Description: Check Mandatory Fields |
| WHO | Employee Code: AH |
| WHY | No Activation |
| WHEN | Source Type: Workflow Duration Date Calculation: 1D |
| WHAT | Art: Field Examination |

Condition

Table ID: 5065 (Interaction Log Entry)

Code: WF080-B010

Description: Check Mandatory Fields

Type: Field Examination

Condition Line 1

Active: Yes

Type: Field

Table ID: 5065 (Interaction Log Entry)

Field ID: 19 (Evaluation)

Filter: <> [Option Value empty]

Editing Form ID: 5076 (Interaction Log Entry)

Condition Line 2

Active: Yes
 Type: Field
 Table ID: 5065 (Interaction Log Entry)
 Field ID: 43 (Comment)
 Filter: Yes
 Editing Form ID: 5076 (Interaction Log Entry)

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|------------------|---|
| To-Do Template 2 | Reference Type No.: 5065 (Interaction Log Entry) Code: WF080-TD020 Description: Follow Up Phone Call |
| WHO | Employee Code: PS |
| WHY | No Activation |
| WHEN | Source Type: Reference Date Source Field ID: 4 (Date) Source Offset Date Calculation: 1W Duration Date Calculation: 2D Critical Date Calculation: -1D |
| WHAT | Type: Manual Completion |

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| To-Do Template 3 | <p>Reference Type No: 5065 (Interaction Log Entry) Code: WF080-TD030 Description: Send Apology Letter</p> |
| WHO | Employee Code: LM |
| WHY | <p>Activation Condition Table ID: 5065 (Activation Condition) Code: WF080-C020 Description: V. Neg. Foreign Cust Type: Activation</p> <p>Condition Line 1 Active: Yes Type: Field Table ID: 5065 (Interaction Log Entry) Field ID: 19 (Evaluation) Filter: very negative</p> <p>Condition Line 2 Active: Yes Type: Field Table ID: 5050 (Contact) Field ID: 15 (Territory Code) Filter: Foreign</p> <p>Condition Code: WF080-B020</p> |
| WHEN | <p>Source Type: To-Do Source Code: WF080-TD020 Duration Date Calculation: 1W</p> |
| WHAT | <p>Type: Document Storage Att. Document Type Code: LETTER (Table join by default)</p> <p>Table Join</p> <p>Table ID: 5128007 (Workflow) Table ID to join: 5065 (Interaction Log Entry)</p> <p>Table Join Line 1 Field ID: 1 (Entry No.) Value Type: Field Value: 23 (Assigned To Entry No.)</p> |

Document Group

Code: POST
 Description: Posting
 Directory Path Name: C:\Temp\
 Insert Record Link: YES

Document Type

Reference Type: 5065 (Interaction Log Entry)
 Code: LETTER
 Description: Letter of Complaint
 Document Group: POST

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|------------------|--|
| To-Do Template 4 | Reference Type No.: 5065 (Interaction Log Entry) Code:WF080-TD040 Description: Organize On-Site Meeting |
| WHO | Employee Code: LM |
| WHY | Activation Condition Table ID: 5065 (Interaction Log Entry) Code: WF080-C030 Description: V.Neg <>Foreign Cust. Type: Activation Condition Line 1 Aktiv: Yes Type: Field Table ID: 5065 (Interaction Log Entry) Field ID: 19 (Evaluation) Filter: very negative Condition Line 2 Active: Yes Type: Field Table ID: 5050 (Contact) Field ID: 15 (Territory Code) Filter: <>Foreign Condition Code: WF080-C030 |
| WHEN | Source Type: To-Do Source Code: WF080-TD020 Duration Date Calculation: 1W |
| WHAT | Type: Manual Completion |

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|------------------|---|
| To-Do Template 5 | Reference Type No: 5065 (Interaction Log Entry) Code: WF080-TD050 Description: Follow up and determine improvement |
| WHO | Employee Code: LM |
| WHY | Activation Condition Table ID: 5065 (Interaction Log Entry) Code: WF080-C040 Description: Very Negative Complaint Type: Activation Condition Line 1 Active: Yes Type: Field Table ID: 5065 (Activation Condition) Field ID: 19 (Evaluation) Filter: very negative Condition Code: WF080-B040 |
| WHEN | Source Type: To-Do Group Source Code: WF080-TG010 Source Offset Date Calculation: 1M Duration Date Calculation: 7D Critical Date Calculation: -3D |
| WHAT | Type: Manual Completion |

To-Do Group Template

Reference Type No.: 5065 (Interaction Log Entry)
Code: WF080-TG010
Description: Very Negative Complaint
To-Do Group Line 1
 Type: To-Do
 Code: WF080-TD030
To-Do Group Line 2
 Type: To-Do
 Code: WF080-TD040

Workflows Template

Reference Type No.: 5065 (Interaction Log Entry)
Code: WF080
Description: Costumer Complaint Workflow

Condition

Table ID: 5065 (Interaction Log Entry)
Code: WF080-C050
Description: Complaint Interaction
Type: Workflow Template Use
Condition Line 1
 Active: Yes
 Type: Field
 Table ID: 5065 (Interaction Log Entry)
 Field ID: 13 (Interaction Template Code)
 Filter: S_RET_ORD [Sales claim]

Use Condition: WF080-C050

Workflow Line 1

Type: To-Do

Code: WF080-TD010

Workflow Line 2

Type: To-Do

Code: WF080-TD020

Workflow Line 3

Type: To-Do Group

Code: WF080-TG010

Workflow Line 4

Type: To-Do

Code: WF080-TD050