



# Workflow Scenario Example 11

Type: Recurring Notification  
Department: CRM

November 30th, 2019

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## Learning Objectives

### Conditional Responsibilities

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

### Recurring To-Do

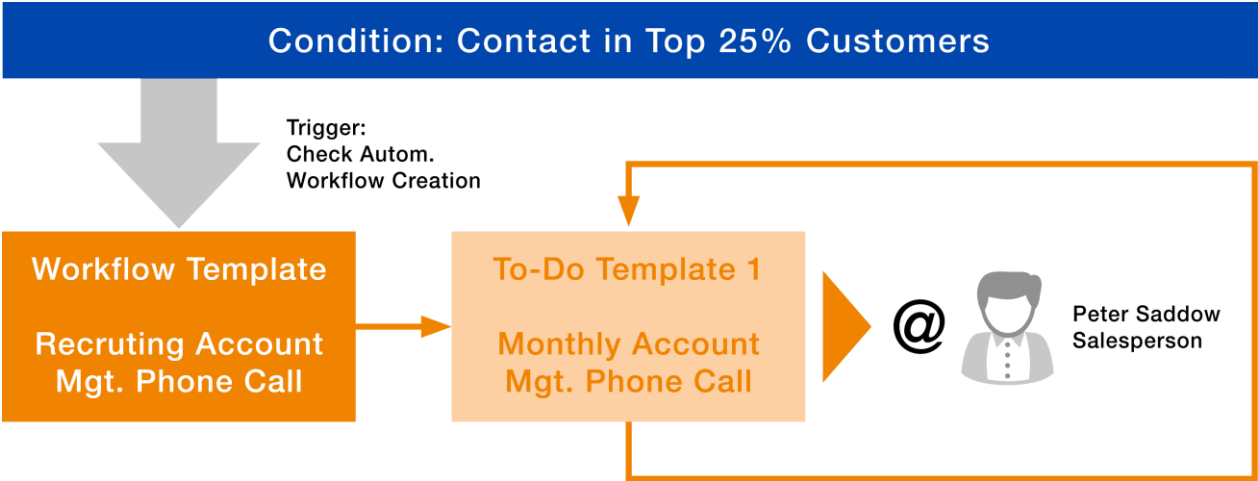
Furthermore, it is possible to define a task as being repeated after a specific period of time.

### Business Process “Monthly Phone Call Alert“

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



## Aptean Advanced Workflow Diagramm





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



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