



# Workflow Scenario Example 3

Type: Basic Notification  
Department: Receivables (Customer)

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## 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)

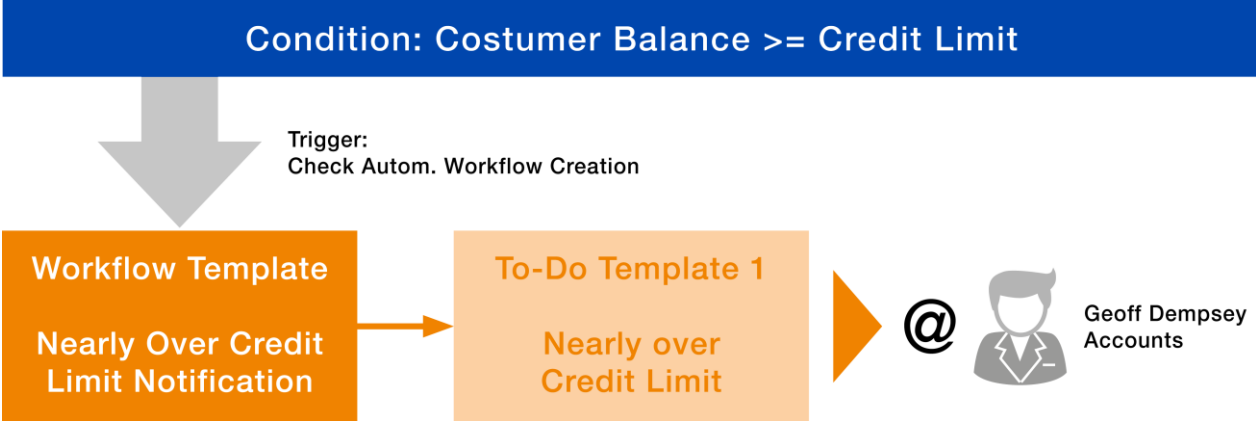
Wild Cards of the arithmetic operation can be used to calculate a field value based on a new value (e.g. - 10%) and to compare it with another.

### 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.



## Aptean Advanced Workflow Diagramm





## Aptean Advanced Workflow Setup

### 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	<b>Reference Type No.:</b> 18 (Customer) <b>Code:</b> WF030-TD010 <b>Description:</b> Customer nearly over Credit Limit
WHO	<b>Employee Code:</b> GD
WHY	No Activation
WHEN	<b>Source Type:</b> Workflow <b>Duration Date Calculation:</b> 7D <b>Critical Date Calculation:</b> -3D
WHAT	<b>Type:</b> 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



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