



# Workflow Scenario Example 5

Type: Basic New Record Workflow  
Department: Sales (Customer)

November 30th, 2019

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## Learning Objectives

### To-Do Group Template

To-Dos can be defined as group tasks (To-Do Group) within this template.

### Field Modification

Field values can be changed automatically depending on the status of a Workflow, To-Dos or the To-Do Groups.

### Team Responsibility

It is in the option to assign a To-Do either to a particular person or to an entire team.

### Document Group

The system allows to subordinate several document types within one Document Group (e.g. document types such as "Item Specification" and "Quality Log" can be part of a Document Group e.g. named "Item Documents").

### Document Type

The document for attachment is specified in the Document Type and is matched to a Data Table (Reference Type). Furthermore, the default file names are set to automate the location of a document.

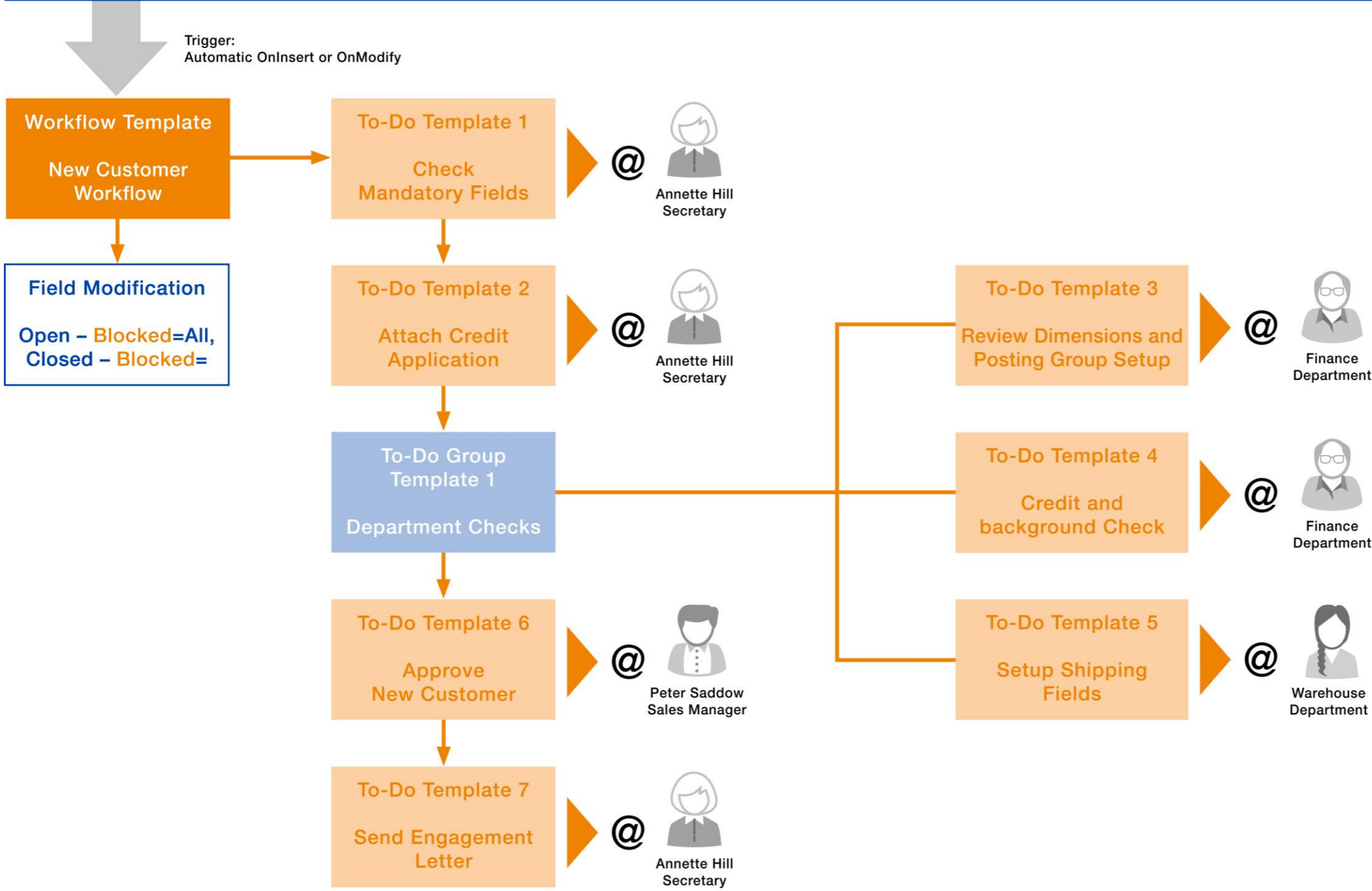
### Business Process "New Customer"

When a new customer is created, Mandatory Fields will be checked and the Credit Contract attached by the secretary. Subsequently, approvals by various departments will take place: The setup of the Dimension and Posting Group as well as the creditworthiness of the new customer are verified by the Finance Department. Furthermore, the Warehouse Department arranges all steps which are necessary for shipping. Once this has been done, the new customer needs to be confirmed by an employee before the contract can be sent out by the secretary.



### Aptean Advanced Workflow Diagramm

All Customers





## 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  
 Default Workflow Template Code: WF050  
 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

### To-Do Template

To-Do Template 1	<b>Reference Type No:</b> 18 (Customer) <b>Code:</b> WF050-TD010 <b>Description:</b> Check Mandatory Fields
WHO	<b>Employee Code:</b> AH
WHY	No Activation
WHEN	<b>Source Type:</b> Workflow <b>Duration Date Calculation:</b> 1D
WHAT	<b>Type:</b> Field Examination <b>Condition Code:</b> WF050-C010

### Condition

**Table ID:** 18 (Customer)  
**Code:** WF050-C010  
**Description:** Check Mandatory Fields  
**Type:** Field Examination  
**All Condition Lines**  
     Active: Yes  
     Type: Field  
     Table ID: 18 (Customer)  
     Process Time ID: 21 (Customer Card)  
**Condition Line 1**  
     Field ID: 2 (Name)  
     Filter: <>  
**Condition Line 2**  
     Field ID: 21 (Customer Posting Group)  
     Filter: <>  
**Condition Line 3**  
     Field ID: 88 (Gen. Bus. Posting Group)  
     Filter: <>  
**Condition Line 4**  
     Field ID: 110 (VAT. Bus. Posting Group)  
     Filter: <>  
**Condition Line 5**  
     Field ID: 20 (Credit Limit (LCY))  
     Filter: >0



To-Do Template 2	<b>Reference Type No:</b> 18 (Costumer) <b>Code:</b> WF050-TD020 <b>Description:</b> Attach Credit Application
WHO	<b>Employee Code:</b> AH
WHY	No Activation
WHEN	<b>Source Type:</b> To-Do <b>Source Code:</b> WF050-TD010 <b>Duration Date Calculation:</b> 1D
WHAT	<b>Type:</b> Document Storage <b>Att. Document Type Code :</b> Credit application

## Document Group

**Code:** CONTRACT  
**Description:** Contracts  
**Directory Path Name:** C:\Temp\  
**Insert Record Link Yes**

### File Filter:

**Display Order:** 1  
**File Filter Code:** PDF  
**File Filter**  
     **Code:** PDF  
     **Description:** PDF  
     **Filter:** \*PDF

## Document Type

**Reference Type:** 18 (Customer)  
**Code:** CREDIT APPLICATION  
**Description:** Credit Application  
**Document Group:** CONTRACT  
**Table Join (automatic request)**  
**Table ID:** 5128007 (Workflow)  
**Table ID to join:** 18 (Customer)  
**Table Join Line 1**  
     **Field ID:** 1 (No.)  
     **Value Type:** Field  
     **Value:** 26 (Assigned To No.)



To-Do Template 3	Reference Type No: 18 (Customer) Code: WF050-TD030 Description: Review Dimensions and Posting Group Setup
WHO	Team Code: FINANCE
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 4	Reference Type No: 18 (Customer) Code: WF050-TD040 Description: Credit and Background Check
WHO	Team Code: ACCOUNTS
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 5	Reference Type No: 18 (Customer) Code: WF050-TD050 Description: Setup Shipping Fields
WHO	Team Code: Warehouse
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

## To-Do Group Template

Reference Type No.: 18 (Customer)  
 Code: WF050-TG010  
 Description: Examination by Departments  
 To-Do Group Line 1  
     Type: To-Do  
     Code: WF050-TD030  
 To-Do Group Line 2  
     Type: To-Do  
     Code: WF050-TD040  
 To-Do Group Line 3  
     Type: To-Do  
     Code: WF050-TD050



To-Do Template 6	Reference Type No.: 18 (Customer) Code: WF050-TD060 Description: Approve New Customer
WHO	Employee Code: PS
WHY	No Activation
WHEN	Source Type: To-Do Group Source Code: WF050-TDG010 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 7	Reference Type No.: 18 (Customer) Code: WF050-TD070 Description: Send Engagement Letter
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD060 Duration Date Calculation: 1D
WHAT	Type: Document Storage Att. Document Type Code: Customer Contract

## Document Group

Code: CONTRACT  
Description: Contracts  
Directory Path Name: C:\Temp\  
Insert Record Link: Yes

### File Filter:

Display Order: 1  
File Filter Code: PDF  
File Filter  
Code: PDF  
Description: PDF  
Filter: \*.PDF

## Document Type

Reference Type: 18 (Customer)  
Code: CUSTOMER CONTRACT  
Description: Customer Contract  
Document Group: Contract



## Workflow Template

Reference Type No.: 18 (Customer)

Code: WF050

Description: New Customer

Use Condition: None (Default Workflow Template on Reference Type)

Workflow Line 1

Type: To-Do

Code: WF050-TD010

Workflow Line 2

Type: To-Do

Code: WF050-TD020

Workflow Line 3

Type: To-Do Group

Code: WF050-TG010

Workflow Line 4

Type: To-Do

Code: WF050-TD060

Workflow Line 5

Type: To-Do

Code: WF050-TD070

Field Modification Line 1:

Old Status Level Filter: 0..14

New Status Level Filter: <>2

Field ID: 39 (Blocked)

Fix Value Input: All

Field Modification Line 2:

Old Status Level Filter: 0..14

New Status Level Filter: 2

Field ID: 39 (Blocked)

Fix Value Input: [Option Value is empty]

Fix Value: 0





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