



# Workflow Scenario Example 8

Type: Basic Process Workflow  
Department: CRM

November 30th, 2019

© 2021 Aptean. All rights reserved.





## Learning Objectives

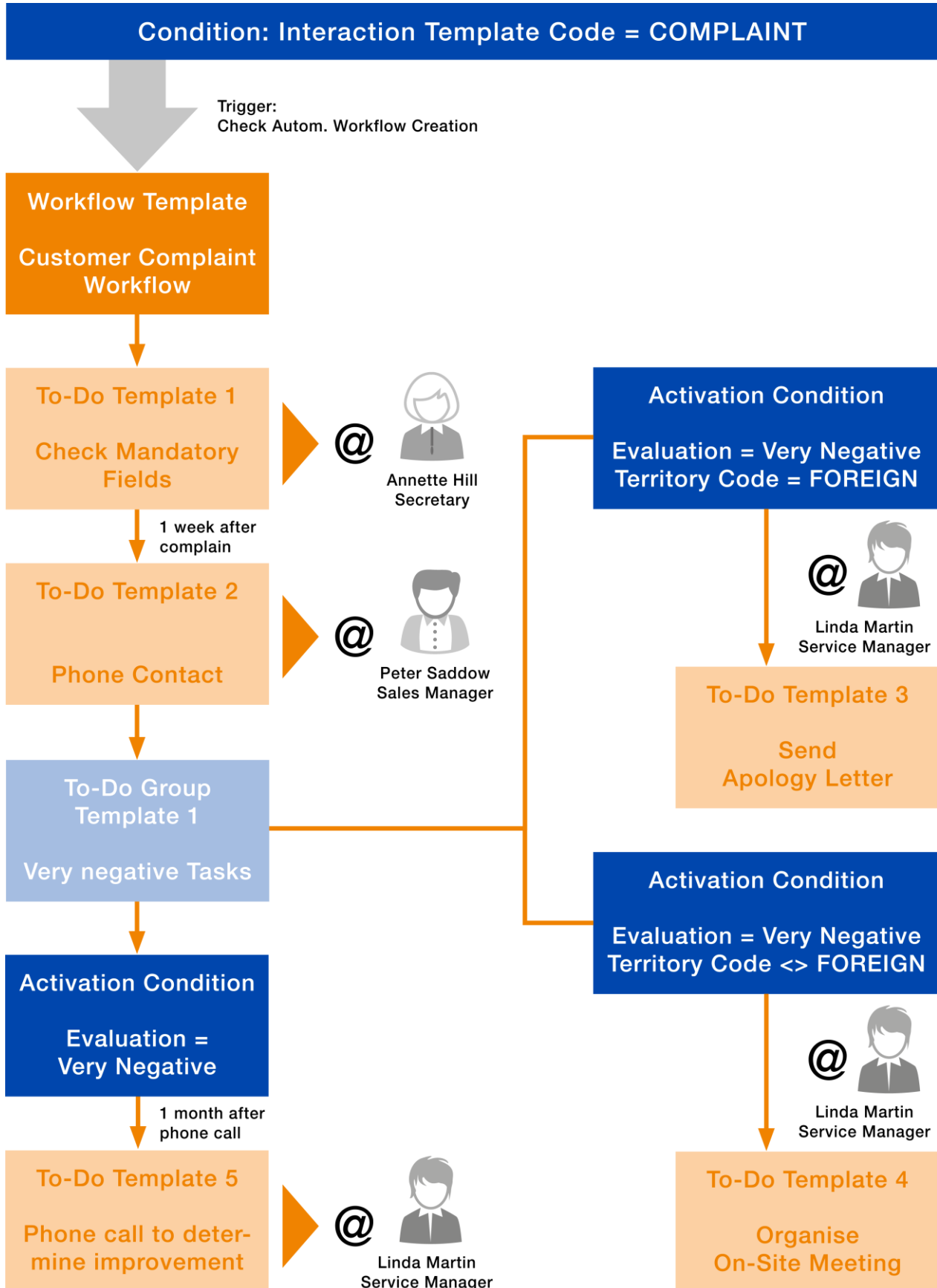
Consolidation of the learning objectives so far.

### **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.



## Aptean Advanced Workflow Diagramm





## Aptean Advanced Workflow 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

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)

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



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

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



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



info@aptean.com

+1 770-351-9600

4325 Alexander Drive, Suite 100

Alpharetta, GA 30022-3740

---

Copyright © Aptean 2021. All Rights Reserved. These materials are provided by Aptean for informational purposes only, without representation or warranty of any kind, and Aptean shall not be liable for errors or omissions with respect to the materials. The only warranties for Aptean products and services are those set forth in the express warranty statements accompanying such products and services, if any, and nothing herein shall be construed as constituting an additional warranty. No part of this publication may be reproduced or transmitted in any form or for any purpose without the express written permission of Aptean. The information contained herein may be changed without prior notice. Some products marketed by Aptean contain proprietary software components of other software vendors. Aptean and other Aptean products and services referenced herein as well as their respective logos are registered trademarks or trademarks of Aptean or its affiliated companies. info@aptean.com