Workflow Management

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Contents

Introduction

Process Automation

Using ZINFI's Workflow (FlexiFlow™), you can create sophisticated workflows and approval flows without the headaches and give every contact in your database the attention they deserve. The Workflow visual editor makes it easy to envision workflows in real time—while building simple or complex follow-up workflows. Use advanced segmentation logic to determine who gets enrolled in your organization's workflows and when.

The Workflow engine automates the regular and repetitive tasks of a business process, allowing your organization to define workflows and approval flows without any code changes, thus saving both time and money. The Workflow engine also helps you improve the platform's stability—again, with no code changes required.

Key features include:

- Automated emails based on defined conditions
- Automated task creation and assignment to users
- Automatic value update in the database based on user-provided criteria
- Ability to define workflows for MDF, lead management, campaigns, deal registration, etc.

Work Flow & Flow Charting Concepts

What is a Work Flow?

Wikipedia defines a "Work Flow" as:

"A workflow consists of an orchestrated and repeatable pattern of business activity enabled by the systematic organization of resources into processes that transform materials, provide services, or process information It can be depicted as a sequence of operations, declared as work of a person or group, an organization of staff, or one or more simple or complex mechanisms."

This may seem vague and a bit confusing so let's put it into simpler, common terms:

A Work Flow is a process in which work or action is taken to get some business step done. This can be organized and repeatable and is often shown as either a diagram or flow chart – illustrating the necessary steps for each role involved.

So, thusly – a workflow is nothing but a step by step process that is formalized to get work done within an organization. These are incredibly important to a business, as they define the agreed upon steps within a business process that people must take in order to accomplish that action. These are agreed upon and adopted by all personnel involved and establish a repeatable pattern for this process – so that things are always executed in this expected fashion. Let's take a look now as some common steps involved in a simple or more complex Work Flow.

Work Flow Steps

When considered the steps (or pieces) of a Work Flow, you must first start with several questions:

- **PROCESS:** ***What action or business process are we trying to define the Work Flow for?*** Define what is the exact business process (internally or for your external teams) that you are trying to accomplish here.
- **PLAYERS:** ***Who will be involved in this Work Flow?*** Decide which team members (internal and external) will touch steps in this Work Flow, and in what order.
- **TRIGGER:** ***What action or event begins this Work Flow?*** Make sure you know the exact action that is taken that kicks off this Work Flow – where does it all begin?
- **STEPS:** ***What are the steps taken by the players in this Work Flow as it progresses?*** Once the initial step has commenced, what are the other steps that this process will involve, and how do the players you have defined above touch these steps and are engaged with?
- **RESULT:** ***What is the end result or goal of this Work Flow?*** Define what the end goal is and what all the steps need to lead to as an output, once all the players have done their actions within this Work Flow.

Answering these questions in a preliminary outlining of your Work Flow will help you get organized and start to play out how this Work Flow will be structured. From there, you can develop a visual Flow Chart (see next section) to diagram the steps and how they relate to each other. From this, you can then build out this process in a manual or automated fashion within your Partner Portal.

Example 1: Simple Work Flow

Let's consider a Work Flow for a Partner Rep to create an opportunity within the Partner Portal.

- **PROCESS:** Partner Rep will create and opportunity from an existing (or new) lead record.
- **PLAYERS:** Partner Rep
- **TRIGGER:** Determine the lead record to create the opportunity from.
- **STEPS:**
  - Does the lead record exist?
  - If yes, proceed to step "d"
  - If no, enter the lead information and create the record.
  - Once the lead record is selected, click to create a "New Opportunity"
  - Enter all necessary Opportunity information
  - Add line items/products
  - "Save" to create the Opportunity record.

- **RESULT:** Partner Rep has created a new Opportunity from a new or existing lead record in order to eventually Register a Deal.

Example 2: Multi-Role Work Flow (with Approvals)

Let's consider here a Work Flow for a Partner Rep to submit a claim against an MDF (Market Development Funds) Plan, in order to get reimbursed by the OEM (Vendor) for a marketing activity that has been executed.

1. **PROCESS:** Partner Rep will create and submit an MDF Claim for Approval and Payout.
2. **PLAYERS:** Partner Rep, Partner Admin, OEM Admin, OEM Finance Officer
3. **TRIGGER:** Selection of MDF Plan to create Claim against
4. **STEPS:**
    a. Partner Rep selects the proper Approved MDF Plan to create the Claim against
    b. Click through to create a new MDF Claim for approval submission.
    c. Fills out all necessary Claim information, using their previously Approved MDF Plan as reference.
    d. Attached all necessary POP (Proof of Performance) documentation
    e. Submits Claim
    f. Partner Admin receives submitted claim and Approves/Rejects it to go through to the OEM Admin
    g. If Rejected, Claim goes back to the Partner Rep for editing or correction – after which they can re-submit.
    h. If Approved, Claim goes through to OEM Admin.
    i. OEM Admin received submitted Claim and reviews it for business requirements.
    j. If Rejected, it goes back to the Partner Rep for editing or correction – after which they can re-submit.
    k. If Approved, Claim is passed on to Finance.
    l. Finance Officer reviews the Claim for Approval/Rejection of Claim Payout.
    m. If Rejected, the Claim goes back to the OEM Admin for further action.
    n. If Approved, the Claim is approved for payment and payout is processed.
5. **RESULT:** Partner Rep has submitted their MDF Claim, gotten Approval and will receive payout.

Flow Charting a Work Flow

Flow Charting is when you take the outline of the Work Flow steps created, and develop a diagram (often with shapes and connecting, directional lines) that shows how the process is navigated through and what paths to results are followed. This make it easy to visually concept and follow how this Work Flow is executed (which helps all player see how they fit in, and help any teams building this process out to develop the tools and resources for each step). Let's get to know the typical elements first.

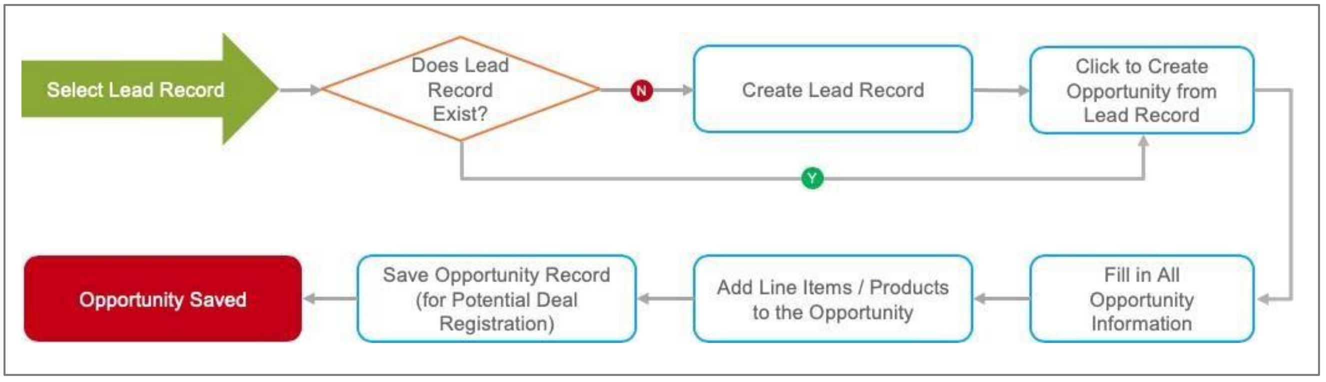
Flow Charting Elements

Here are some common elements to building out a Flow Chart, and how they are represented. Read these definitions and then see how they are used in the diagrams below.

- **Trigger:** This is the first step and the "BEGIN" point of the Flow Chart.
- **Step (Manual):** This is a box or component within the Flow Chart to show a particular step or action point that is done by a manual process.
- **Step (Automated):** This is a box or component within the Flow Chart to show a particular step or action point that is done by an automated process (usually triggered by the previous manual step).
- **Decision/Criteria:** This is the element in the Work Flow wherein a decision needs to be made, or certain criteria needs to be reviewed - and based on the outcome of that decision/criteria (whether manual or automated) various branches are created for the remainder of the Flow, providing alternate paths to an eventual end state.
- **Action:** This is an action (manual or automated) that is triggered by the outcome of a decision/criteria step – that moves to the next steps in the process – and moves ahead in real time.
- **Scheduled Action:** This is an action (manual or automated) that is triggered by the outcome of a decision/criteria step – that moves to the next steps in the process – and does not happen sequentially, necessarily. This might be scheduled to happen at a later date or at some timed occurance.
- **End/Result:** This is the final and "END" point of any branch of the Flow Chart.

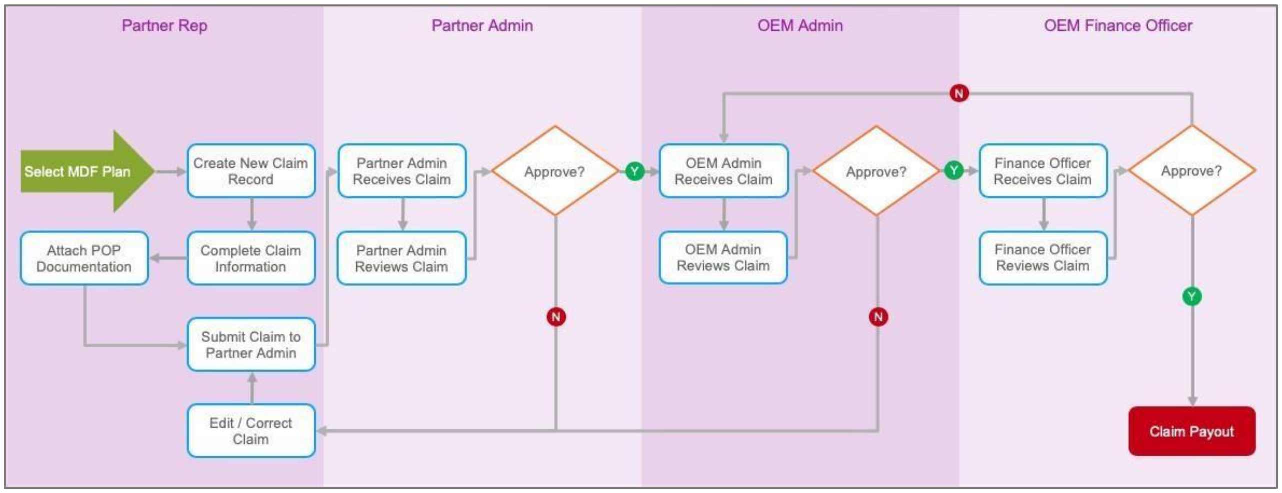
Example 1: Flow Chart of Simple Work Flow

Using a) the Simple Work Flow outlined, and b) the elements as described, in the sections above - here is an example of how the Flow Chart for this might look:



Example 2: Flow Chart of Multi-Role Work Flow (with Approvals)

Using a) the Multi-Role Work Flow (with Approvals) outlined, and b) the elements as described, in the sections above - here is an example of how the Flow Chart for this might look:

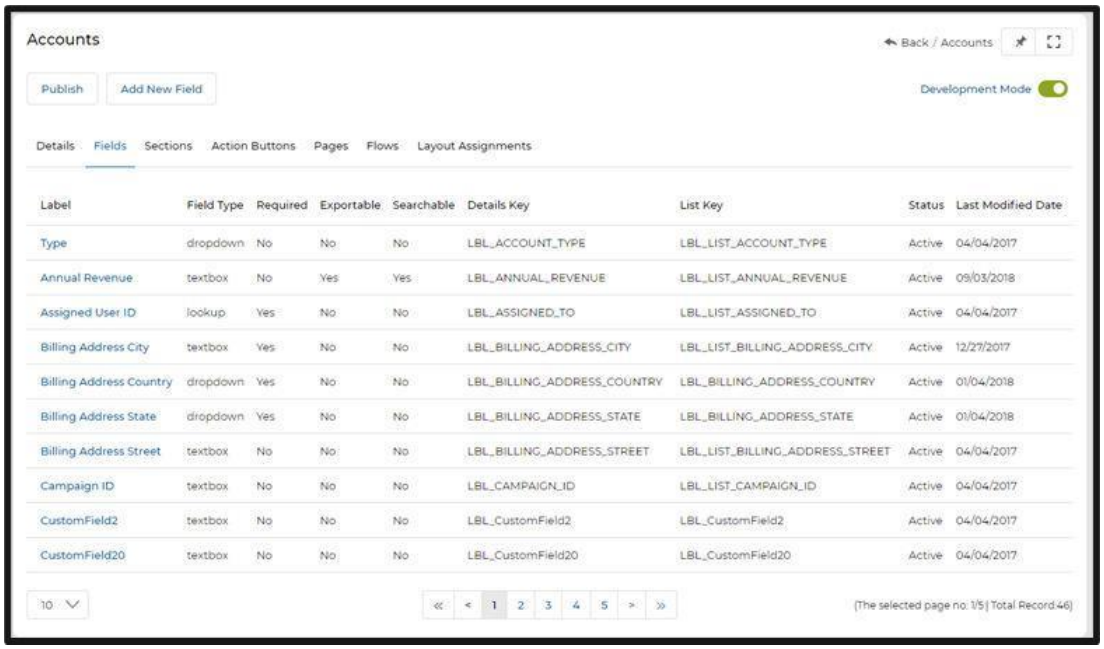


Workflow Tools

Let use the Workflow backend for the “Accounts” (in Lead Management) module/tool as an example below.

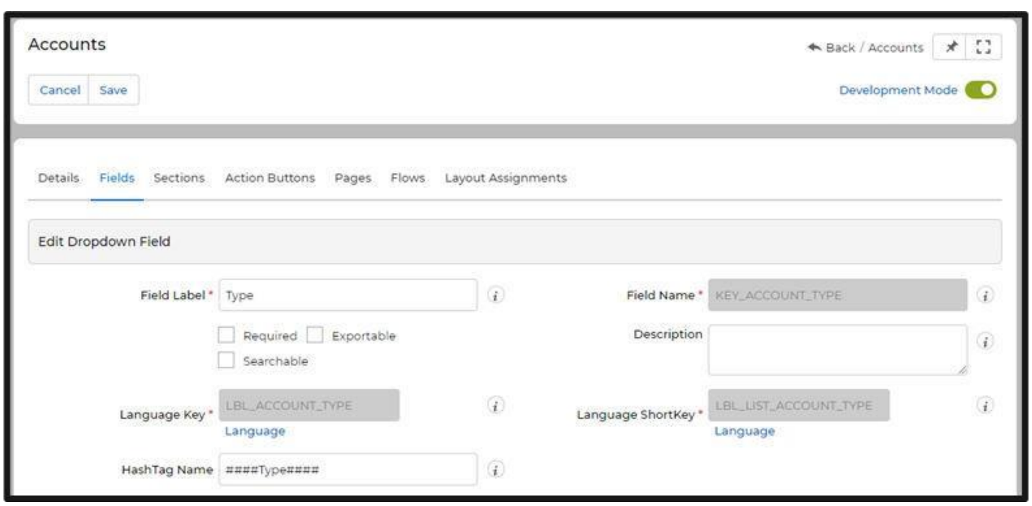
Fields

A field is like a custom Database column. Object field Store the data for the records. ZINFI UPM by default provide few fields with our standard objects those are called standard fields. We cannot delete a standard field. If we want, we can change label name. Custom fields can be created known as Custom field. We can delete a custom field in UPM.To edit, **Development Mode** needs to be enabled.



Label	Field Type	Required	Exportable	Searchable	Details Key	List Key	Status	Last Modified Date
Type	dropdown	No	No	No	LBL_ACCOUNT_TYPE	LBL_LIST_ACCOUNT_TYPE	Active	04/04/2017
Annual Revenue	textbox	No	Yes	Yes	LBL_ANNUAL_REVENUE	LBL_LIST_ANNUAL_REVENUE	Active	09/03/2018
Assigned User ID	lookup	Yes	No	No	LBL_ASSIGNED_TO	LBL_LIST_ASSIGNED_TO	Active	04/04/2017
Billing Address City	textbox	Yes	No	No	LBL_BILLING_ADDRESS_CITY	LBL_LIST_BILLING_ADDRESS_CITY	Active	12/27/2017
Billing Address Country	dropdown	Yes	No	No	LBL_BILLING_ADDRESS_COUNTRY	LBL_BILLING_ADDRESS_COUNTRY	Active	01/04/2018
Billing Address State	dropdown	Yes	No	No	LBL_BILLING_ADDRESS_STATE	LBL_BILLING_ADDRESS_STATE	Active	01/04/2018
Billing Address Street	textbox	No	No	No	LBL_BILLING_ADDRESS_STREET	LBL_LIST_BILLING_ADDRESS_STREET	Active	04/04/2017
Campaign ID	textbox	No	No	No	LBL_CAMPAIGN_ID	LBL_LIST_CAMPAIGN_ID	Active	04/04/2017
CustomField2	textbox	No	No	No	LBL_CustomField2	LBL_CustomField2	Active	04/04/2017
CustomField20	textbox	No	No	No	LBL_CustomField20	LBL_CustomField20	Active	04/04/2017

Editing an Existing Field



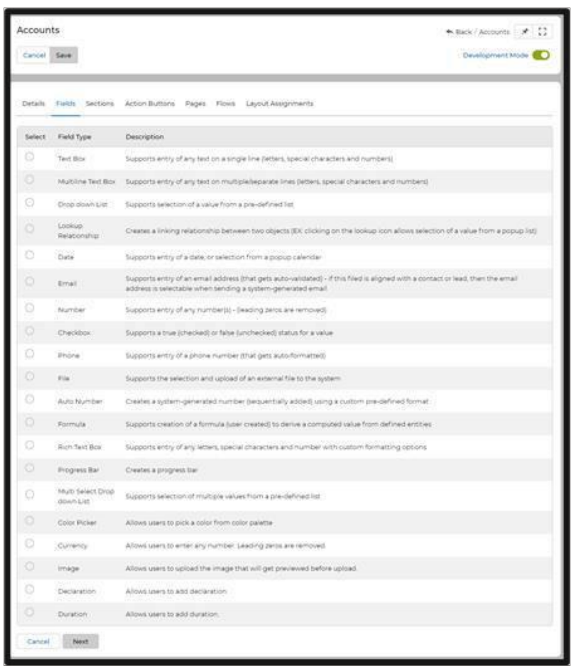
Once a field is created, when editing an existing field – you can only edit certain elements of it:

1. **Field Label** – there are three options you have under the name input here:
    a. **Required:** Sets field as mandatory requirement.
    b. **Exportable:** Field can be exported to other modules.
    c. **Searchable:** Field is searchable by keying search text (the field label)
2. **Language** – You can pick which language(s) this field will appear under.
3. **Status** - You can set this field to being either Draft, Active or Inactive
4. **Description** - What is the description of this field.

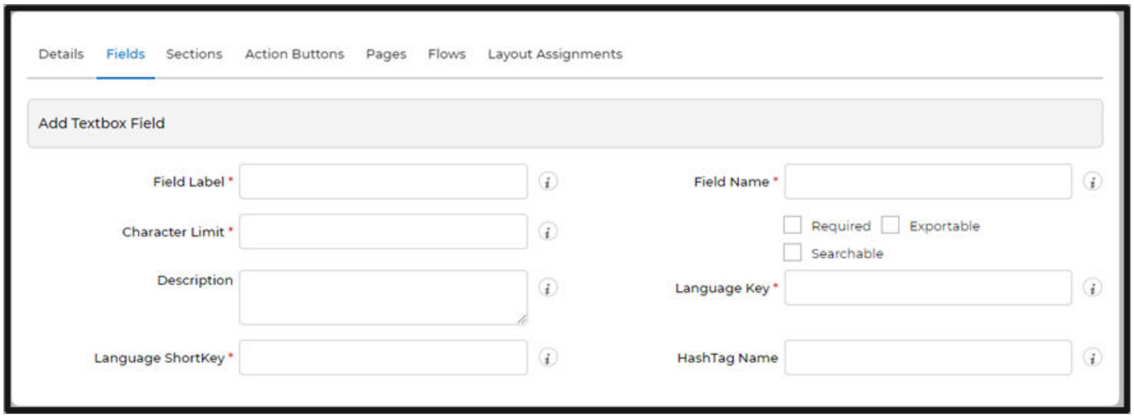
Adding a New Field

Select Field Types

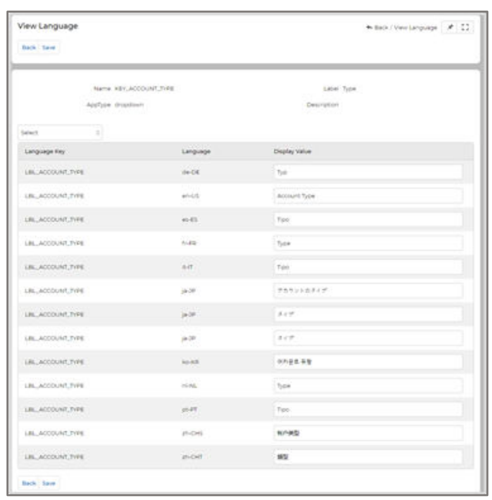
When you click on **Add New Field**, you are redirected to a page where you can select the specific field type. Select the appropriate field type (e.g., Text Box) from the available field types to create the specific field. You can see the field type options and short descriptions of each on this page.



Creating Field Values



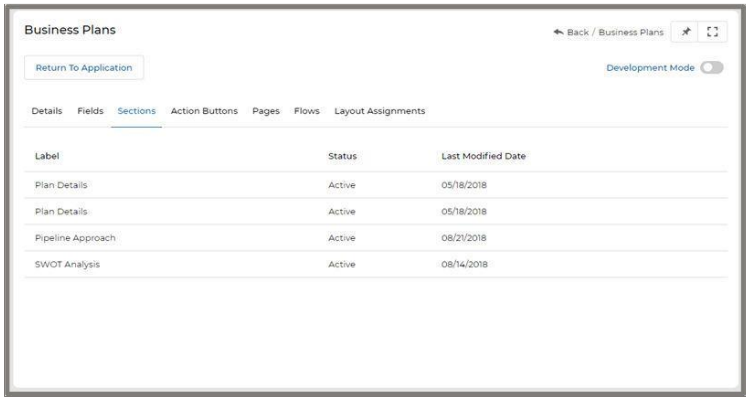
1. **Field Label** – The actual displayed name of this field in its label. (see *Editing a Field* above)
2. **Field Name** – The name of this field in the system
3. **Character Limit** – How many characters is this field limited to have typed in?
4. **Description** – What is the description of this field?
5. **Language Key** – The ability to set what display value you wish this field to have when viewed in different languages of the UI:



6. **Language ShortKey** – Ability to select which language(s) you want this field to be available for.
7. **Status** – What is the status of this field, as far as being enabled?
8. **HashTag Name** – What do you want the hash code name for this field to be? *(this would be the hashcode that can be used and placed in marketing materials to dynamically pull in values from this field into those content pieces)*

Sections

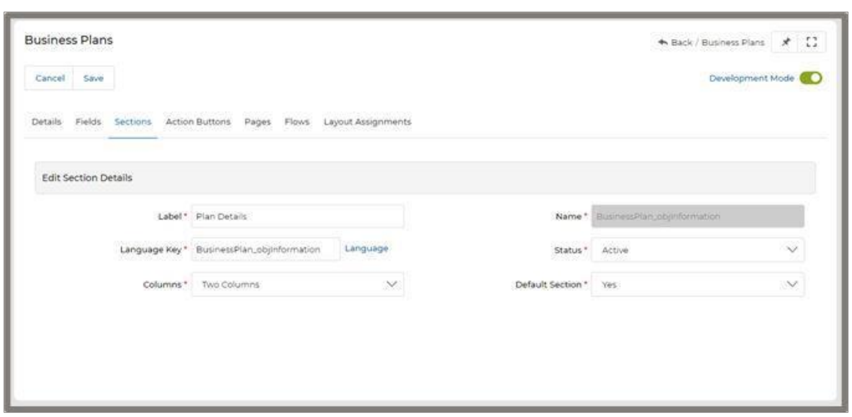
A section is a container of fields in ZINFI UPM. User creates a section in ZINFI UPM and puts fields already created into the section to make it usable. To view sections associated with a module, click on **Sections**. To edit a particular section, click on that section.



Editing an Existing Section

Workflow users can update the following values of a section (marked with a red asterisk in the figure below):

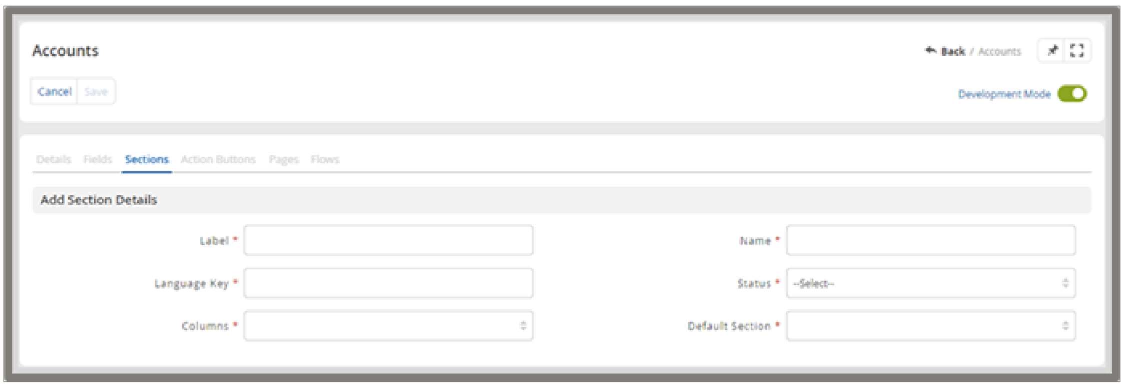
1. **Columns** can be set as One or Two Column(s)
2. **Status** can be set as Active or Inactive
3. **Default Section** can be set as Yes or No.
4. **Language Key** is where you select the display values for the label (header) display when viewed in various language UIs.
5. ***Only the creator of a section can update the name field.***



Adding a NEW Section

Select **Add a Section** from top menu and enter the required values:

1. **Label** – What is the name to be displayed at the top of this section on the page?
2. **Name** – What is the system name of this section?
3. **Language Key** – Select what display (label) values show in different language UIs.
4. **Status** – Can be set as Active or Inactive
5. **Columns** – Can be set as One or Two Column(s)
6. **Default Section** – Can be set as Yes or No

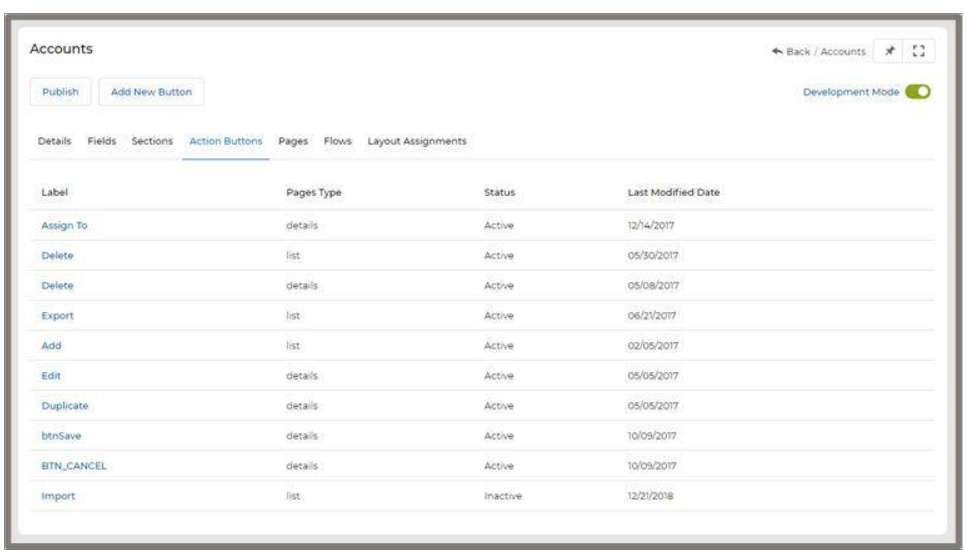


7. Once you have entered the values, click on **Save** to save the newly created section.

Action Buttons

Actions buttons provide a specific set of action to user for the page in which it is viewable. Example of action buttons like Add, Edit, Delete, Search etc.

The actions page provides the default list of actions available in the system.



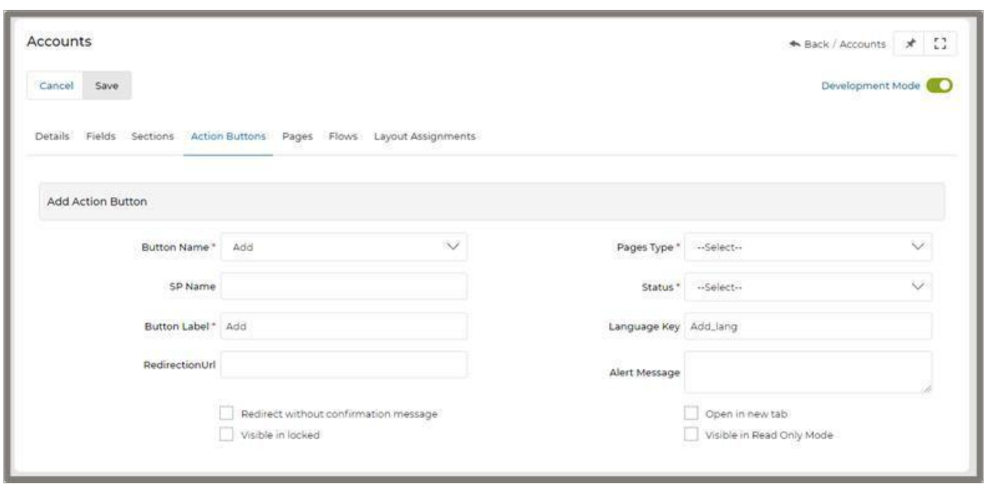
The following actions are provided for modules by default:

- Add
- Edit
- Delete
- Save
- Cancel
- Assign To
- Export
- Sort Order (available in the related list; requires support from the ZINFI configuration team)
- Approve
- Reject
- Recall

Created actions can be edited. Editable fields are like those specified in the Add Action section below.

Add a NEW Action Button

Actions can be added from the top menu. To create a new action, users provide a value and click on **Save** as indicated in the figure below.



1. **Button Name:** Can be selected from the drop-down list (Add, Assign To, Cancel, etc.)
2. **Page Type:** Can be set as List Page or Details Page
3. **Button Label:** What is the display name for this button?
4. **Status:** Can be set as Active or Inactive
5. **Redirection URL:** What URL/page does this button redirect around to?
6. **Open in new tab** (checkbox): If enabled, page uniformly opens in a new tab

7. **Redirect without confirmation message**(checkbox)**:** If enabled, the page redirects without displaying a message
8. **Visible in locked**(checkbox)**:** If enabled, the action is visible for the locked record

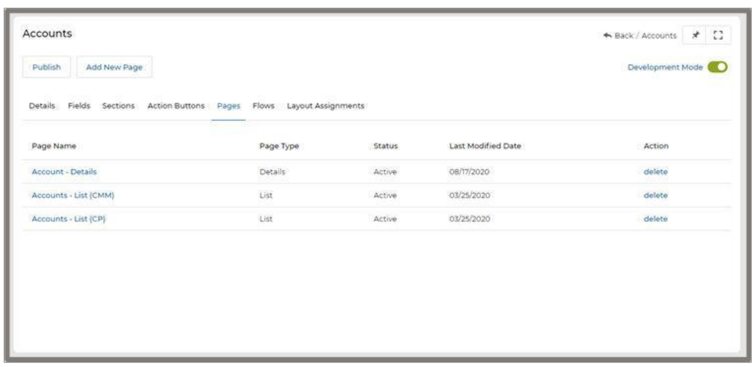
Pages

Workflow Pages lets you create your own page which constitutes the actions button, sections and fields that has already been created.

Pages are generally of two types:

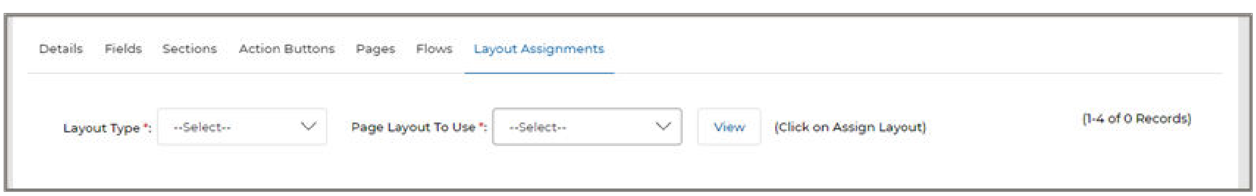
- **List pages** – these are the pages that show the listings of records or content (the View or Library pages)
- **Detail pages** – these are pages that hold the details of records or content (the clickthrough into details)

Existing pages can be viewed and edited as per the figure below:



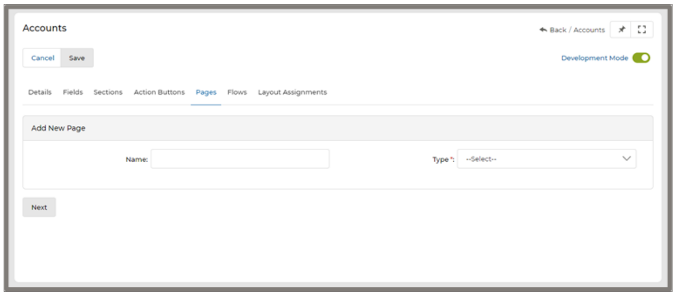
Assign Pages

Layout access can be set as per the following list. Pages can be assigned to multiple groups of users.

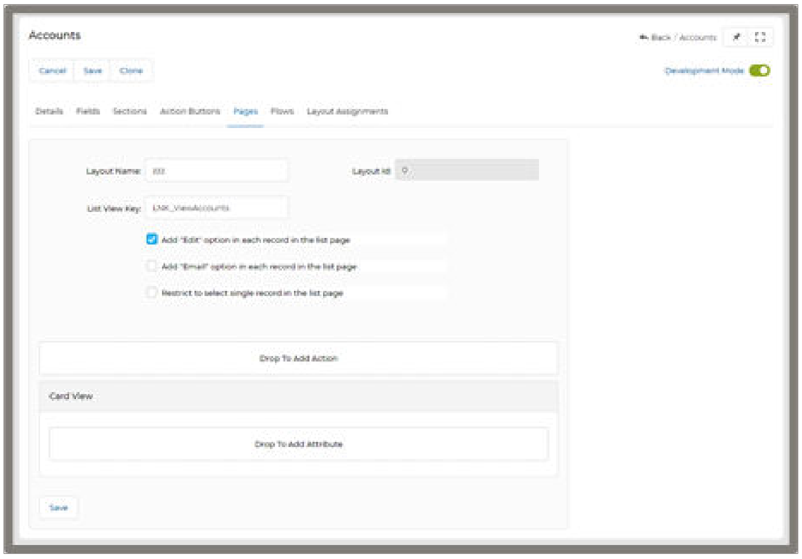


Pages can also be cloned to be used by other modules.

Add a NEW List Page

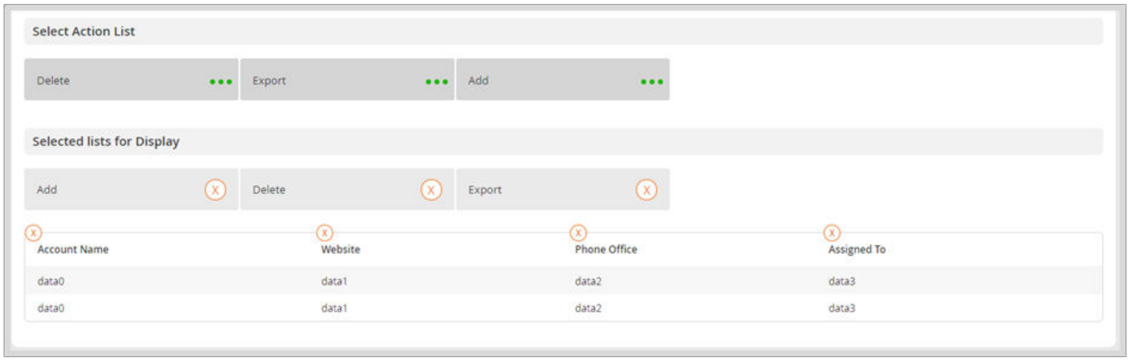


1. **Name:** What is the name for this page?
2. **Type:** Select *List* as the type for this page.
3. **Menu Order:** menu order for the page.



The following operations are carried out next:

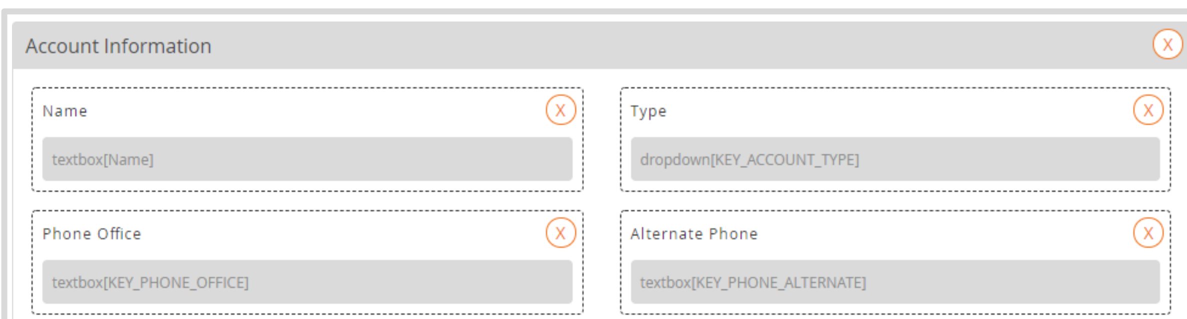
1. Select fields to display the set attribute list.
2. The edit option for each record in the list page can be enabled or disabled.
3. Selection of a single record can be restricted by enabling the restrict option.
4. The actions list can be generally set and selected to be displayed for the list page so that records can be added, deleted or exported as per the figure below:



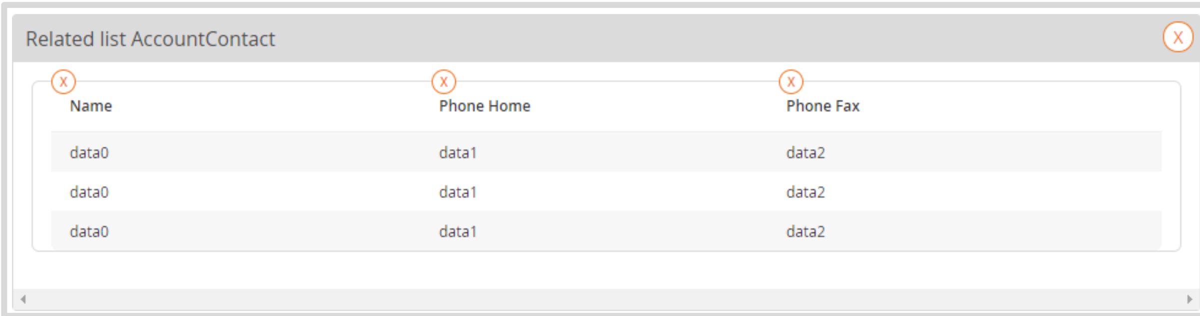
Add a NEW Details Page

The following operations are possible in creating a details page:

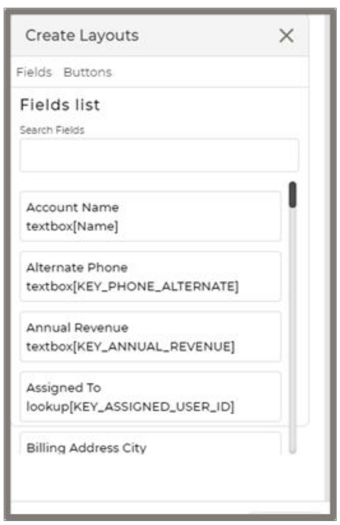
1. Add sections
    a. Add fields
        i. Fields can be marked as read-only on the Add and Edit page



2. Add action buttons
3. Add related list
    a. Select fields to display in the related list
    b. Add actions of the related list
4. Add, Edit and Delete are the default options
5. Can be configured to add only one record in the related list
6. The Add, Edit and Delete options can be hidden here
7. The Add/ Edit page can be set to open as pop-up rather than as a new tab
8. The records in the related list become locked as soon as the parent record is approved, but you can provide an Add option in the approved record.



Pages layouts can be set by selecting objects from the list depicted in the figure below:



Flows

A process flow is a specific type of activity flow that communicates a sequence of actions or movements within a complex system. A flow is a powerful tool for optimizing the paths of people, objects, or information. Connectors and symbols work together to illustrate directions of flow, objects that move, and quantities involved. An important feature of a flow is its ability to incorporate conditional paths that a person or object may follow depending on the state of the condition in question. An example would be a simple user flow that directs a user to their personal account page if they are already logged in or redirects them to a login form if they are not.

Workflow supports the following flows:

- **Workflow** is one of the most powerful native tools available in ZINFI UPM. Workflow is business logic that evaluates records as they are created and updated and determines if an automated action needs to occur. In a way it allows records to speak up or do something – update data, notify people or external systems. Workflow replaces the constant monitoring Users have to otherwise do via reports, dashboard or views to know whether or not it is time to act. At the end of the day workflow accelerates your business processes, by removing the time lag needed for people to review information and decide if action is need. As your business grows, and the amount of data that has to be monitored swells, workflow becomes indispensable to organizations to maximize efficiency with their business processes.

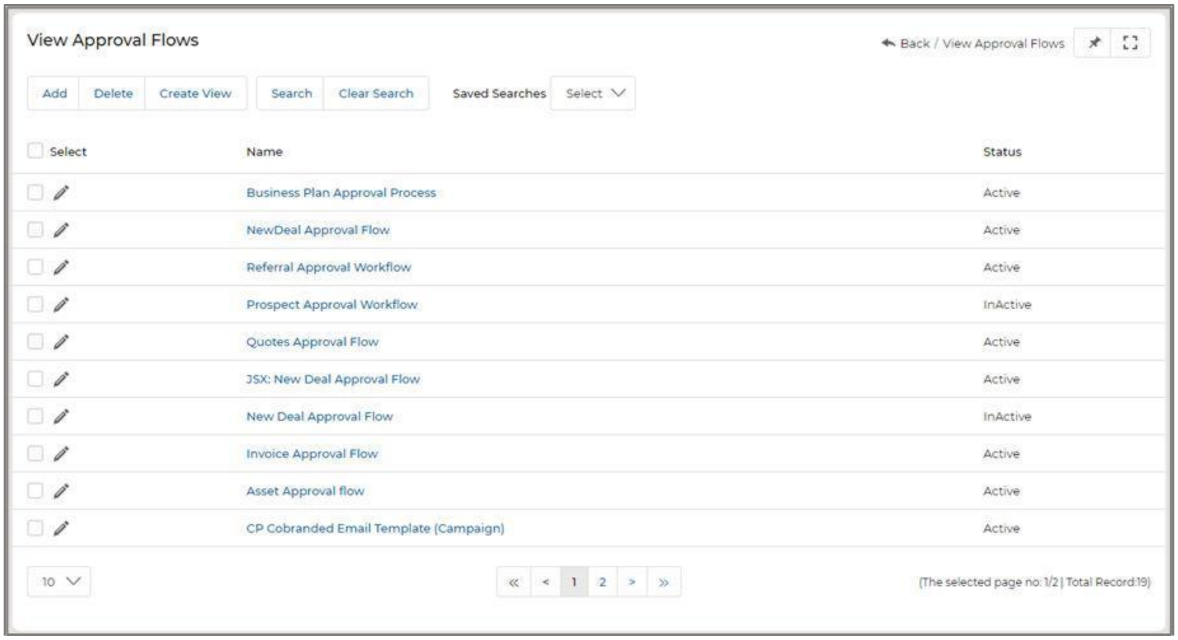
- **Approval Flow** is the method used to approve anything from modules like MDF, Deals Rebates, Rewards, Partner Onboarding etc. that a company wants to automate. Implementing an approval process can standardize an organization's internal processes, and also save time by creating a dependable, repeatable system. Approval processes are a type of workflow, which is any sequence of work from initiation to completion, that you can create to ensure work is approved the same way every time. Additionally, automated approval processes improve transparency and compliance within your organization, since everyone is forced to complete work according to predefined criteria. They also improve decision making, such as whether or not to adopt a project, because the process you define will help you more clearly identify costs and benefits of any work proposal.

Approval Flows

Managing Existing Approval Flows

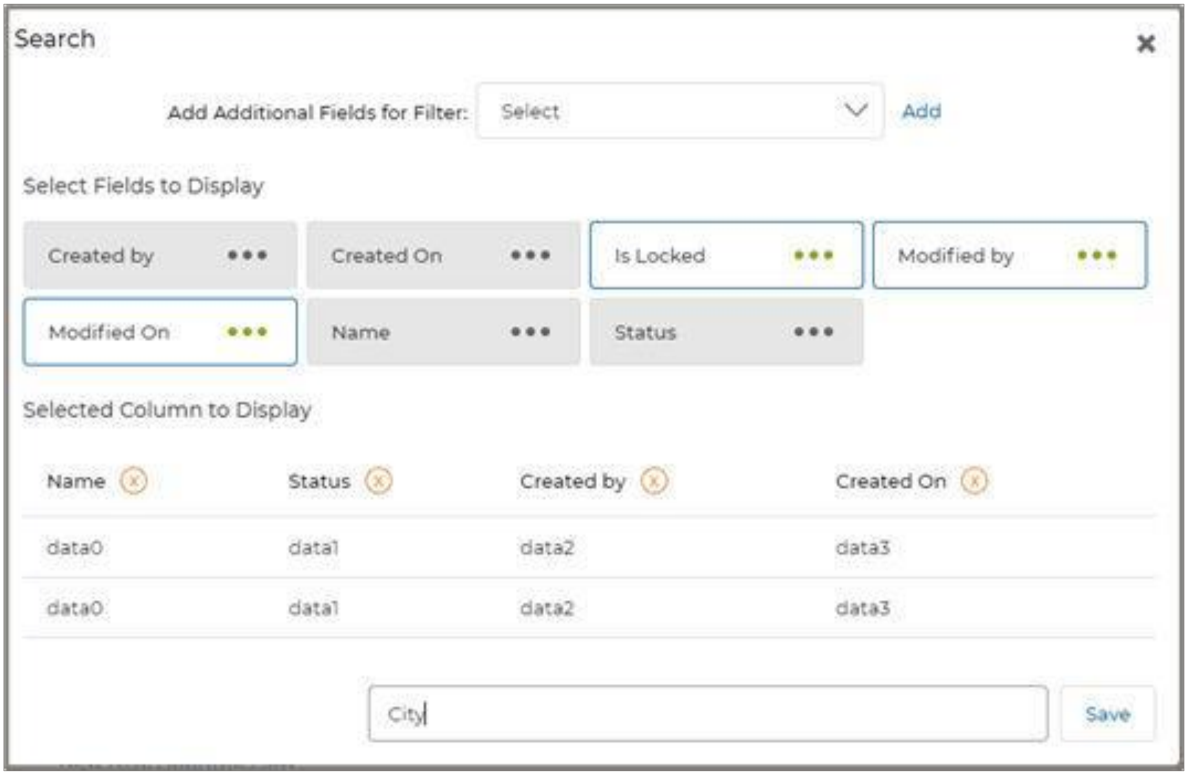
Looking Up for Existing Approval Flow List

1. The top part of the page provides some actions:
   a. **Add** – Opens a new page to add a new record.
   b. **Delete** – Deletes selected record(s) from the listing page.
   c. **Create View** – Lets you create own view with set of columns as needed.
   d. **Search** – Opens a new pop-up window where you can put search criteria to find desired records.
   e. **Clear Search** – Clears the search made.
   f. **Saved Searches** – Shows a list of saved searches in the search dropdown. When selected, two more options are shown:
      i. **Edit** – Provides option to update the selected search name.
      ii. **Delete** – Deletes the selected search name from the search dropdown.
2. For each record in the grid, if you click on:
   a. **Edit (Pen icon)** – Lets you edit the selected record.
   b. **Any linkable item** – Takes you to its details page.



Create New View

1. Choose additional field and then click on **Add**.
2. Click on Green Dots to select the fields for display.
3. Selected columns are shown in the table. To remove a selected column from the display list – just click on the cross button.
4. Provide a View Name, and then click on **Save** to create the new view.



View Approval Flow Details

1. The top part of the page provides some actions:
   a. **Edit** – Opens the selected flow in editable mode.
   b. **Activate** – Activates the flow.
   c. **Deactivate** – Deactivates the flow.
   d. **Clone** – Duplicates the flow.
2. Displays approval flow information.

Edit/Create An Approval Flow

Utilizing the fully configured automated approval processes implemented via Workflow, you can now submit records for automated approval in ZINFI's UPM platform.

The approval flow can be summarized as follows:

- The approval flow can be configured for a specific module
- There will be an entry criterion for each approval flow
- Templates can be initialized by:
    - Approver on submission or approval
    - Submitter on approval
    - Submitter on rejection
        - The initial submitter can be defined as
            - A group of users
            - The manager of the creator of the record
            - Any specific user who is the owner
            - Any related user of the record
- The field update option appears in the initial submission process
- The nth level of approval process can be configured at any level
- Approvers can be defined as
    - Users
    - Groups
    - Managers
    - Related users
- Information can be escalated after a specified time period
- Following actions can be added on approval or rejection at any step
- New email can be configured
    - The email can be sent to additional users
- Field can be updated
- The record can be assigned to additional users
- Final approval and rejection – all actions can be defined in final approval or rejection.

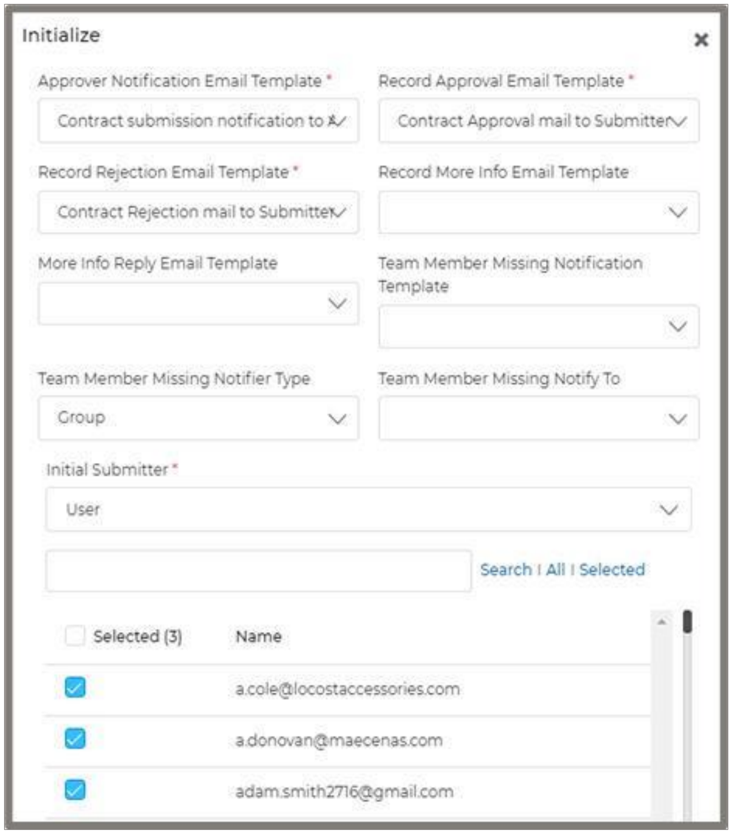
You can set up the approval flow from Workflow as specified below:

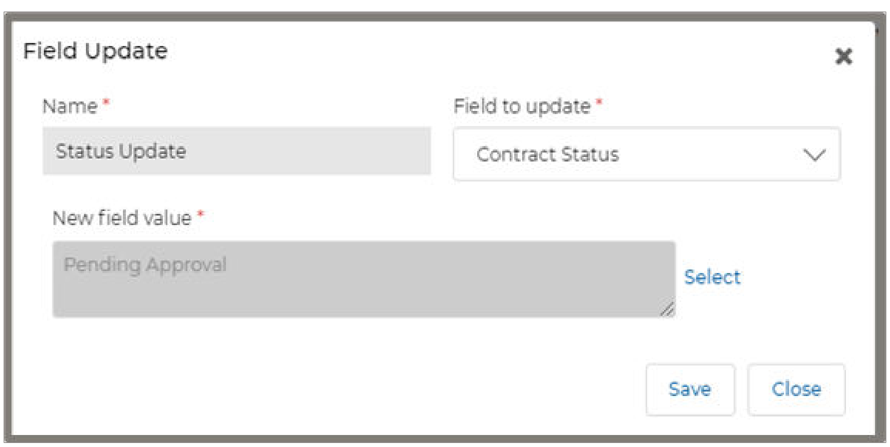
1. **Module –** This indicates the module in which the approval process will be made, such as MDF, Deal Registration and so on.

2. **Criteria –** This indicates the condition which the record should satisfy to undergo approval processes—e.g., the status field of the record has the value “Ready for submission.”

3. **Initialize –** This is where you set up the email templates to send an email upon approval action. The “initial submitter” can submit the record for approval and field update if required on record submission. For example, if you designate the initial submitter as “CP” and update the status field to “Record Submitted,”

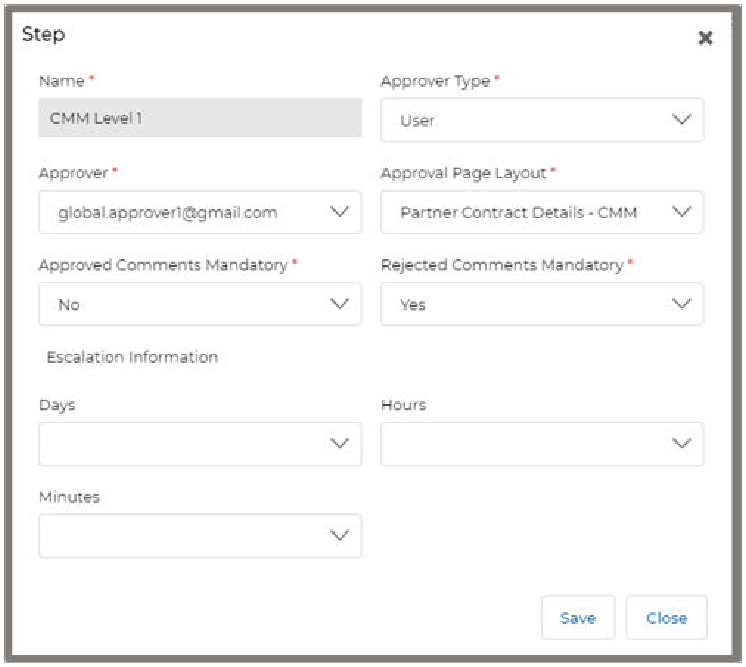
then CP can submit the record for approval and upon submission of the record the status field is updated to Record Submitted. Once the record is submitted for approval it is locked and cannot be edited.





4. **Step** – This is where you can designate the “Approver” who can approve the record after submission. Approval Page layout specifies the details of the record that the approver will see while approving the record. You can also set up escalation information. For example, if no approval action is taken within a predefined time interval, then the record is approved automatically and assigned to the next level of approver, if it exists.

You can set up multiple steps in the approval process. In every step of the approval process, the submitter is notified about the approval action of the record via email. Upon approval action of a step, the next step approver, if it exists, is notified via email that the record is pending for approval. If the record is rejected in any of the approval process steps, then the approval process stops for that record.



5. **Tools** – There are basically three types of tools you can use upon approval or rejection of a record: Email, Field Update and Assignment. For every level of the approval process, you can set up approval/rejection actions using these tools—for example, if you want to send email to user(s) after Step 1 of the approval process is approved or rejected.

   a. **Email –** This where you can set up the email template and specify the recipient type who will be the recipient of the email: a group of users, an email field (if any email field in the record), a manager (the manager of the owner of the record), a related user (if any user object related with the record like owner) and to users. There is also an additional email field where you can designate a CC recipient. (This is similar to Workflows.)

   b. **Field Update** – This is where you can set up any updates to the record field—for instance, if you need to change the status of the record upon approval. (Again, this is similar to Workflows.)

   c. **Assignment** – This is where you can set up the assignment of a record to a group or user upon approval action. (Again, this is similar to Workflows.)

6. **Final Approval Tools** – This is where you can set up final approval actions, such as sending email to users, updating fields of the record or assigning the record to users. This will only execute once the final approval step is approved.

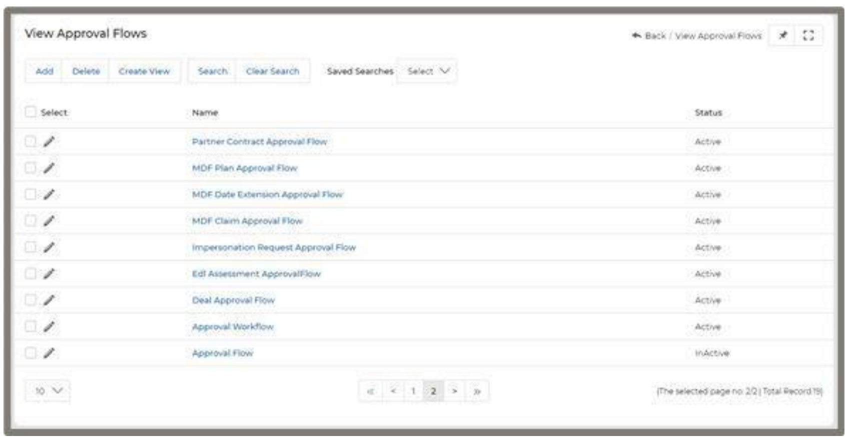
7. **Final Rejection Tools** – This is where you can setup final rejection actions, such as sending email to users, updating fields of the record or assigning of the record to users. This will execute if any approval step is rejected.

When approval flow is created it is in "Inactive" mode. There are two possible actions when you view the approval flow details.

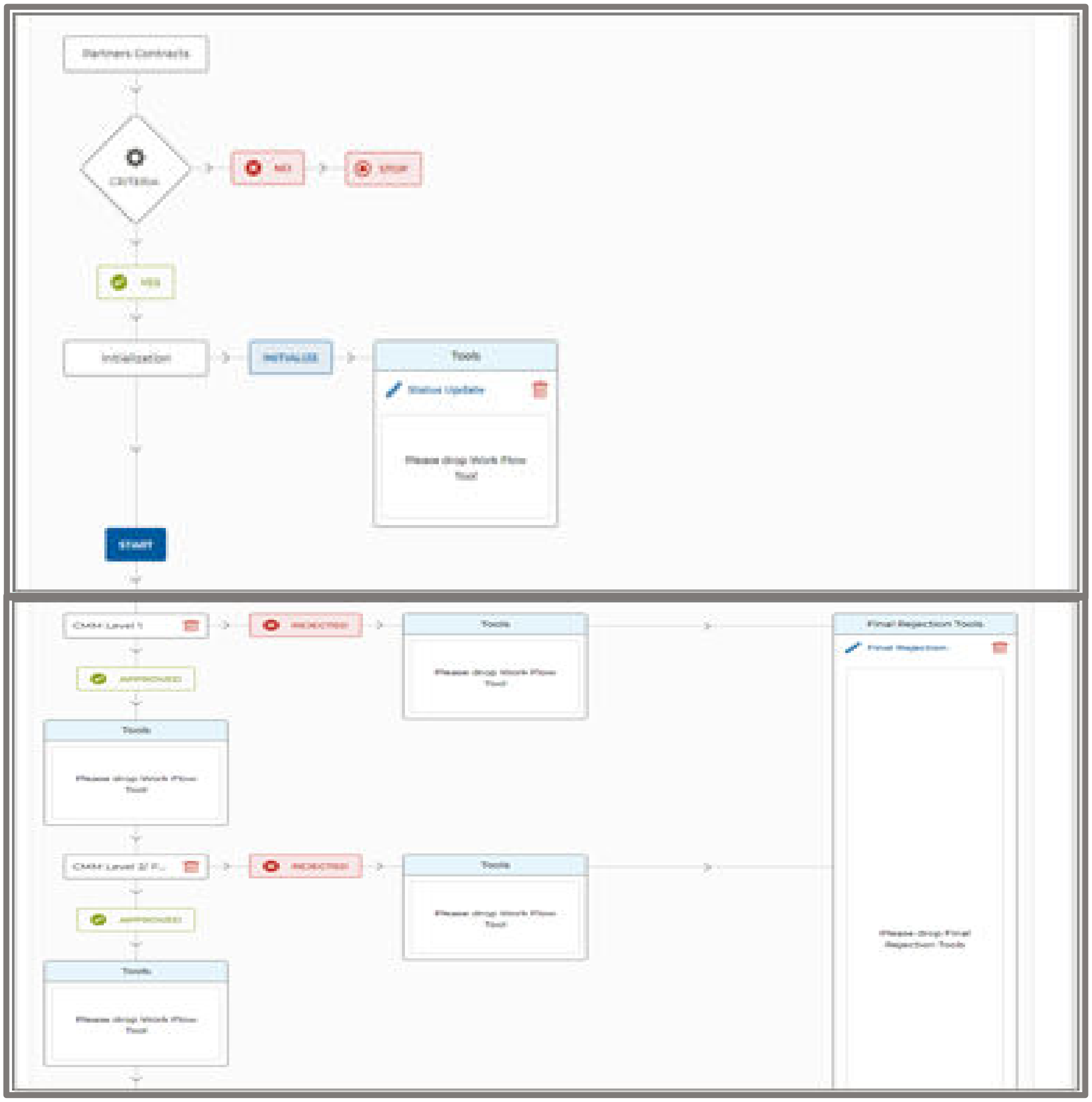
- "Activate" activates the workflow.
- "Deactivate" makes the workflow inactive. If any edit is required in the workflow, you will need to deactivate the workflow with this action before you can make changes. Deactivation can be performed only if all scheduled actions have been completed.

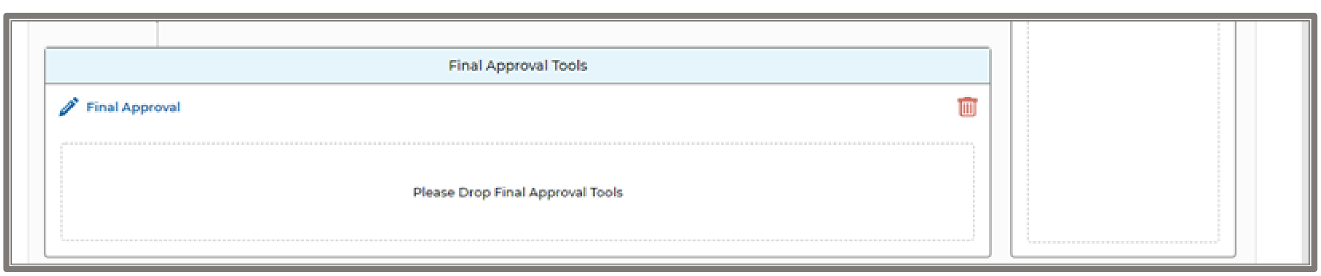
View Approval Flows

Approval flows can be viewed in the figure below:



Approval Flow Example





Approval flows can be simultaneously edited, activated, deactivated and cloned.

Workflow Tools

The Workflow Canvas has an array of features letting you create extensive workflows for automating your business processes. Primarily divided into three sections, the canvas along with the tools; provided through the tool bar lets you drag and drop objects to create the workflow at optimum pace and definition to map your custom business process.

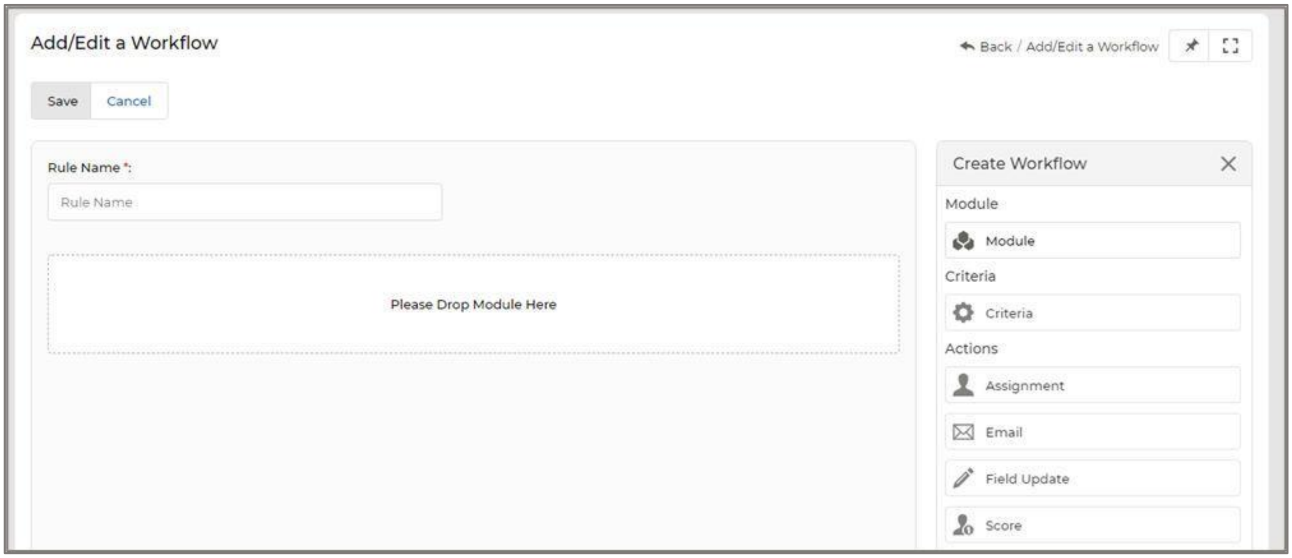
The Menu Bar lets you Save the Workflow. Cancel option is provided to let you stop the workflow development process and attend your urgent jobs at hand.

The Canvas is housed with a mandatory Rule Name, which needs to be provided to save the Workflow, as without the Workflow Rule Name, the workflow cannot be referred for future usage and current automation of operations. The Canvas further provides a blank space as an interface which lets you drag and drop objects from the Tool Bar to create the Workflow to demonstrate and automate your custom business process. The blank space surrounded with dashed lines is the start block and you need to kick start by dropping a module.

Tool Bar

The Tool Bar consists of the following which would be further covered in detail:

- **Module** – The Module is nothing but an UPM Object (which have attributes/properties/fields and has a respective function in the processing of a business objective). Prospects, Contacts, Accounts, viz. are considered as UPM Objects.
- **Criteria** – Is a UPM Object listener, whenever a criteria specified by you is fulfilled for that specific Object, then the following set of defined actions would be evaluated/processed.
- **Actions**
  - **Assignment** - Based on the criteria setup and resultant success/failure, the UPM object is assigned to a specific business process.
  - **Email** – Based on the evaluation of the criteria, emails can be sent to specific users/groups.
  - **Field Update** - Fields can be set to auto-update based on the criterion result of the UPM Object.
  - **SFDC Push** – As of now, we have provided option for UPM Objects to be transferred to third-party CRM's viz. Salesforce (SFDC); therefore, based on the evaluation parameter, the UPM Object can be pushed to Salesforce.

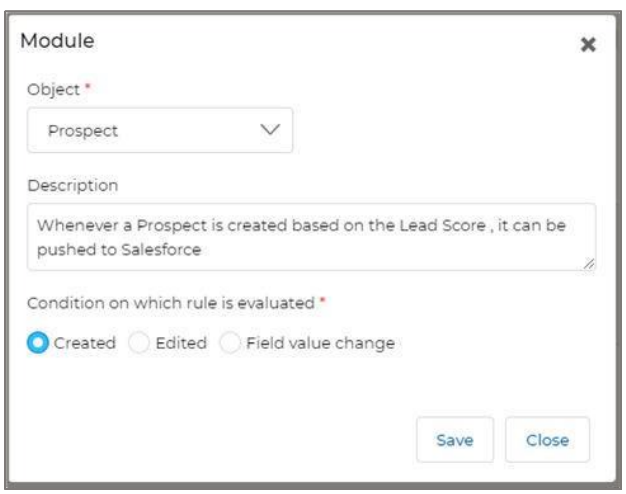


Modules

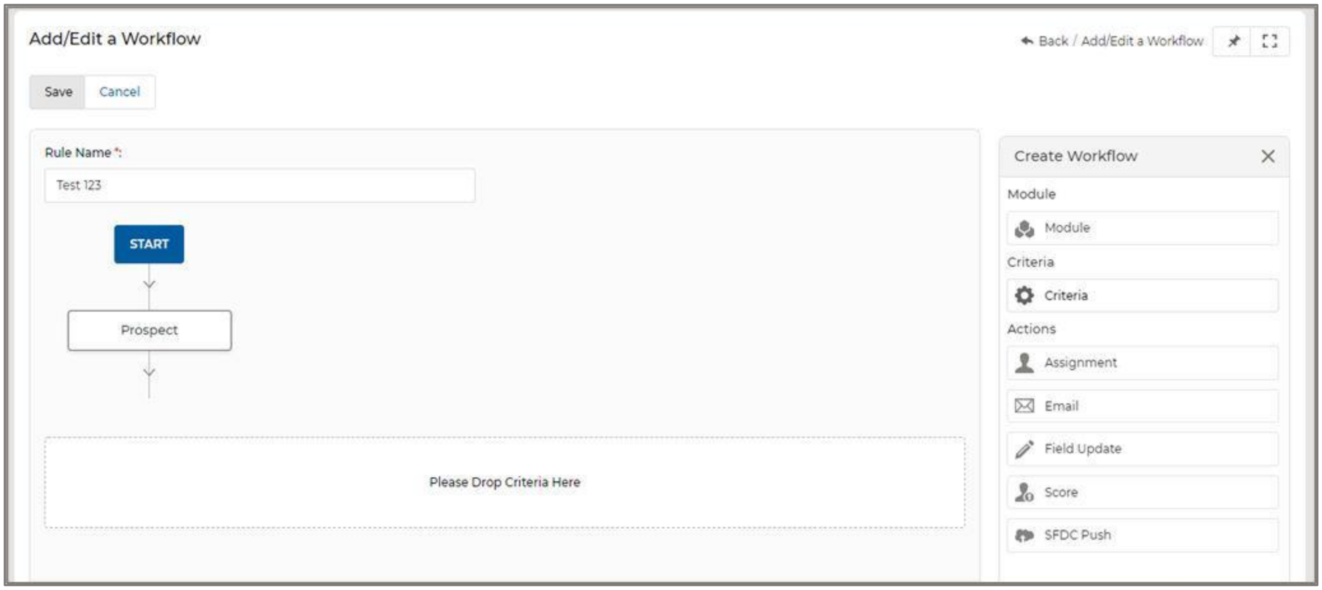
The Module Tool lets you initiate the workflow process, by setting up the mandatory primary object, based on which the workflow initiates. Once you drag the Module Tool from the Workflow Tool Bar and drop in the Canvas, the Module Tool window opens up and lets you select any UPM Objects (pre-loaded/custom), put in a description and select the condition on which the Object Rule would be evaluated. The following Conditions are supported:

- Created – Whenever the UPM Object is created, the Rule is evaluated.
- Edited – The Rule is evaluated, as soon as the UPM Object gets edited.
- Field Value Change – The most detailed option, lets the Rule to be evaluated whenever any Field of the UPM Object is specifically updated.

In our Example Case, Prospect Object is selected, description provided, and Rule is setup and saved.



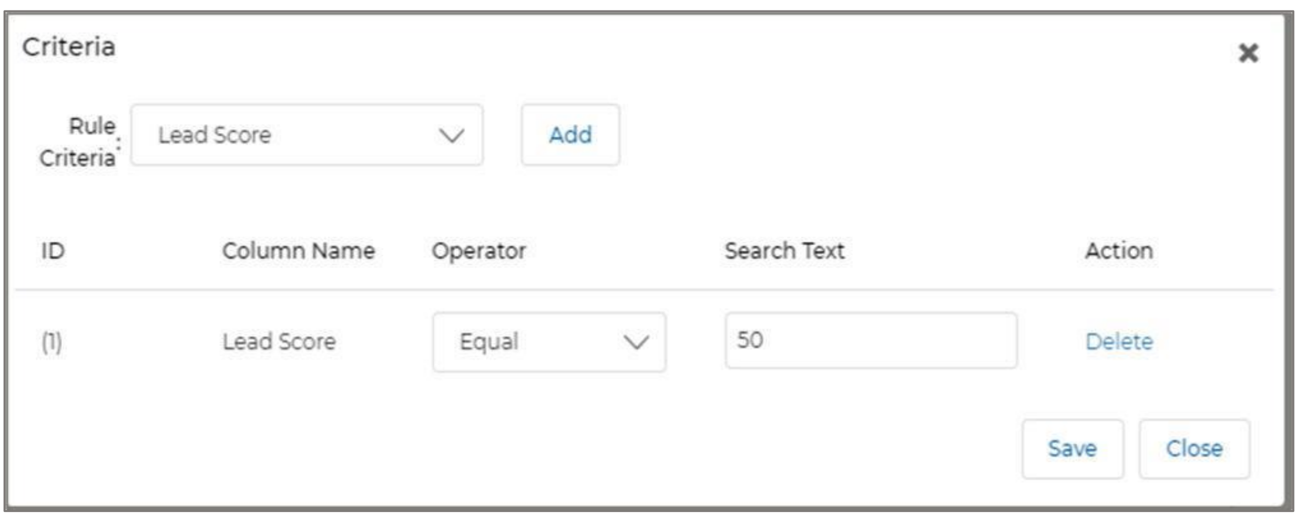
On providing the above parameters and saved, the Canvas auto updates to a view as presented below:



Now, as we see, the workflow is initiated with a Start and an UPM Object has been setup as the Primary Module, we will proceed to setup a workflow criteria.

Criteria

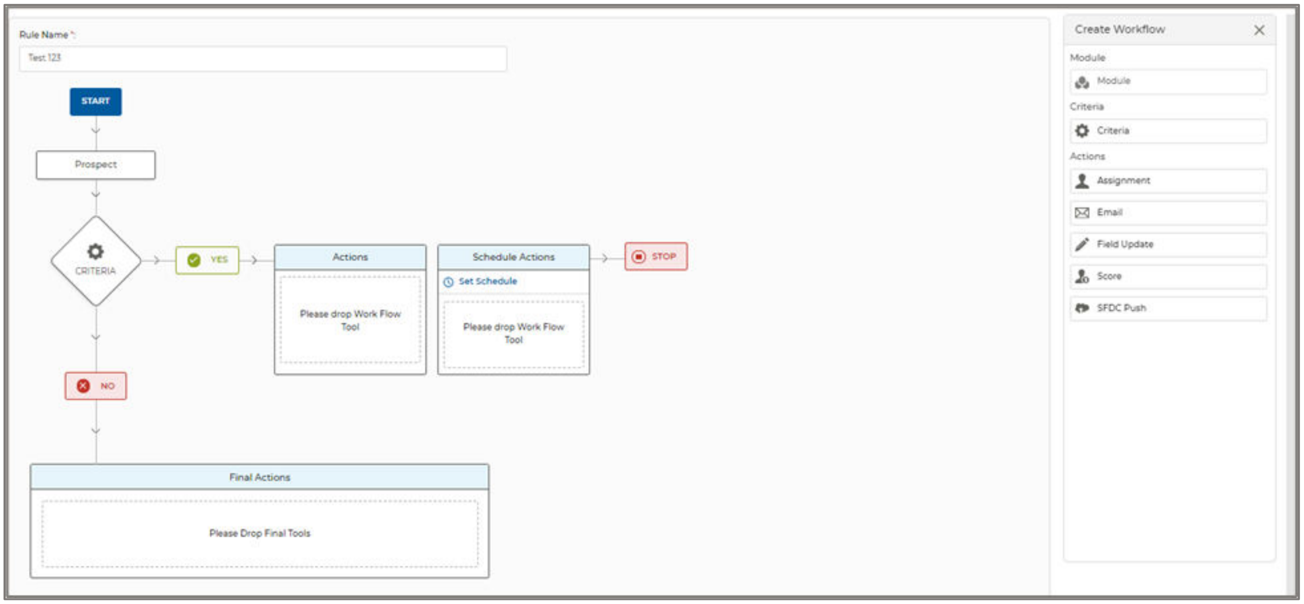
The Criteria Tool lets you setup the criteria for the processing of the workflow. For our example case; we would be needing to create a criteria wherein Leads created with a Lead Score above 50 are automatically pushed to SFDC. We will start by drag-dropping the criteria in the Criteria Canvas space and select the Rule Criteria, viz. Lead Score and click on Add to setup the Operator and value to be referenced for evaluation of the criteria. In the example case, we have set the operator to Equal and value as 50, resulting to a scenario, that whenever the Lead Score of a created Prospect equals 50, the Criteria would be evaluated as a success.



A Criteria yields two sets of actions, once when it succeeds and another when it fails. These two actions are named as True, for a success and a False, for a failure. Once the above criteria action is setup and saved. The canvas is updated with the following tools.

On the Criteria being True, you now have the privilege to setup Actions or Schedule Actions. We will setup an Action to push the Prospect to SFDC and may schedule the push at a specific time of the day/month, as per the business process.

On the Criteria being False, Final Actions can be setup by drag-dropping Actions which are processed on the failure of the Criteria, in our example case we will setup an Email to be sent on the non-fulfillment of the Criteria, viz. when the created Prospect's Lead Score is not 50, an Email would be sent to the Channel marketing Manager (CMM), stating the same and because of the score the respective Lead wasn't pushed to SFDC.

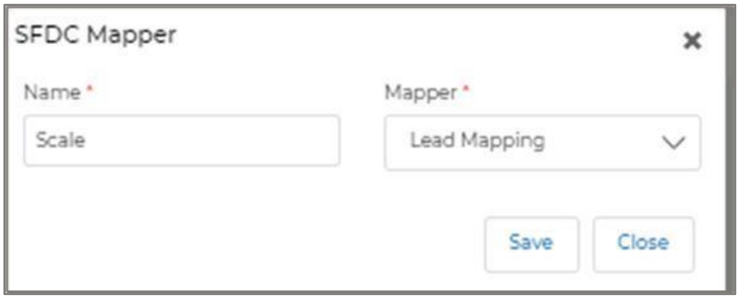


Actions

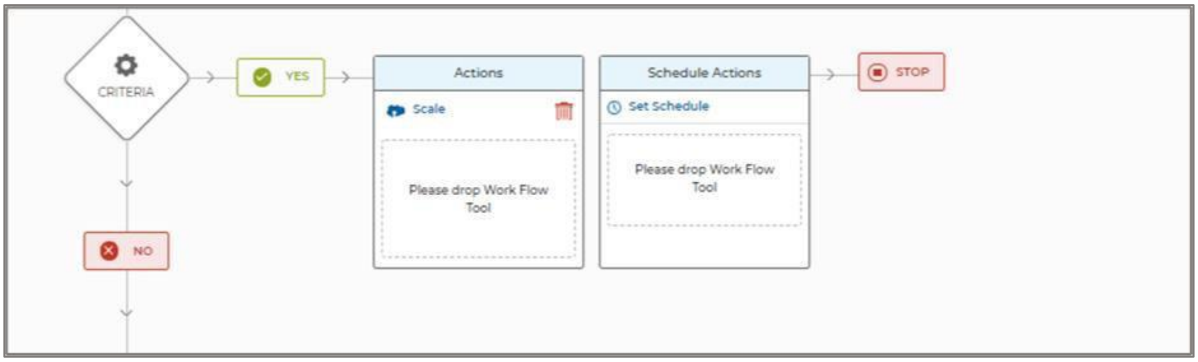
Actions are the endpoints of the workflow process and can be setup on the successful evaluation of the Criteria/failure of the evaluation of the Criteria. For our example case, we will drag-drop the SFDC Push Action for the Criteria True set of Actions Window and drag-drop Email Action for the Final Action, when the Criteria is evaluated as False.

SFDC Push

On drag-dropping the SFDC Action to True Actions, the Action window opens up for you to provide a name for the SFDC Push Action and set the Mapper which is created by the Portal Admin through the Administrative section (where SFDC Credentials are provided and entrusted along with the mapping of object fields between UPM and SFDC).

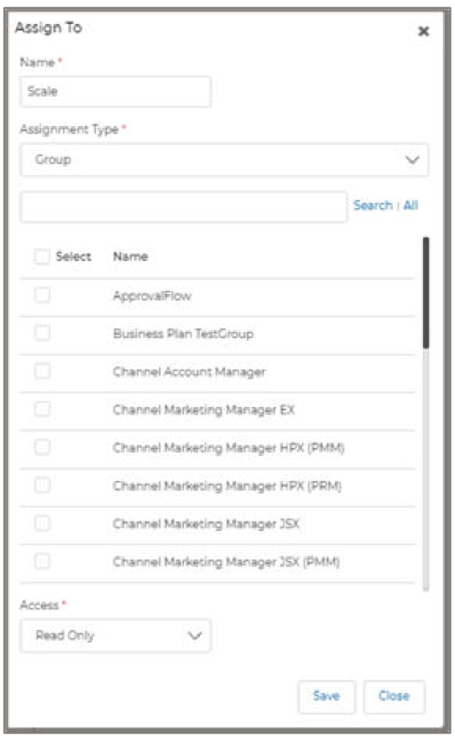


Automatically, the Canvas is updated to display the specific Action. Multiple Actions can be setup as per the business process.



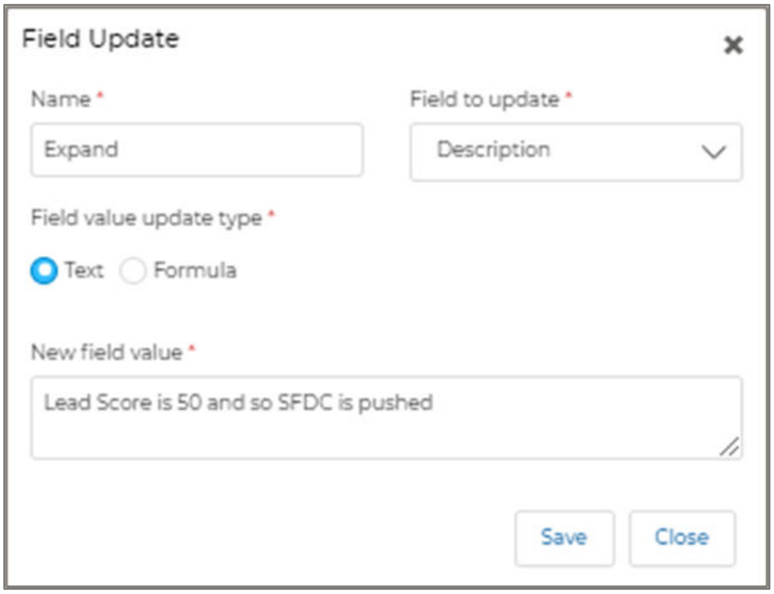
Assignment

The Assignment Action; lets you provide a mandatory name for the specific Action and assign the UPM object to a User/Group and set Access to Read/Read-Write.



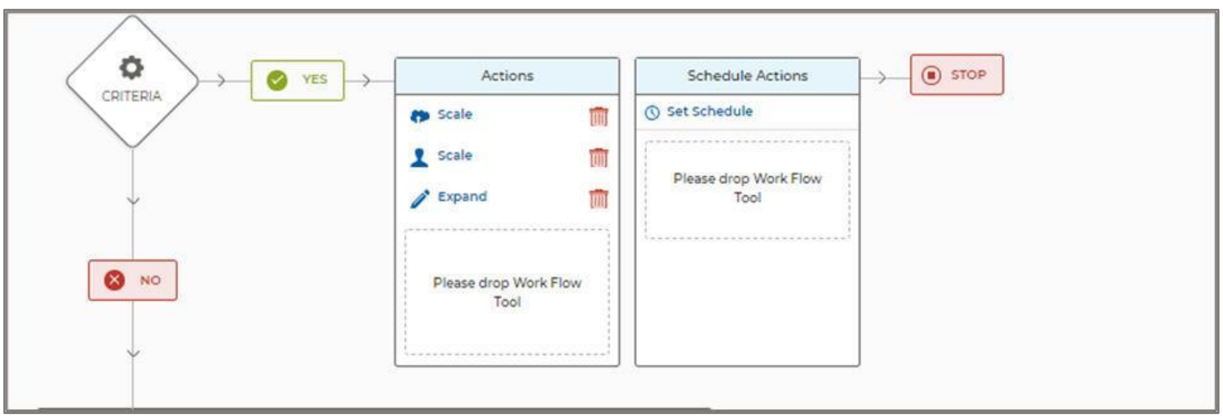
Field Update

Based on the evaluation of the Criteria, specific Fields of the primary UPM Object (selected from the Module Action) can be set to be updated automatically with a specific value of based on a formula.



In the example case, we are setting up Field Update Action to update the Description Field of the Prospect UPM Object (whose Lead Score equals 50 and Criteria evaluation is Success/True) to update its value to the text provided in the New Field Value and Save the Action.

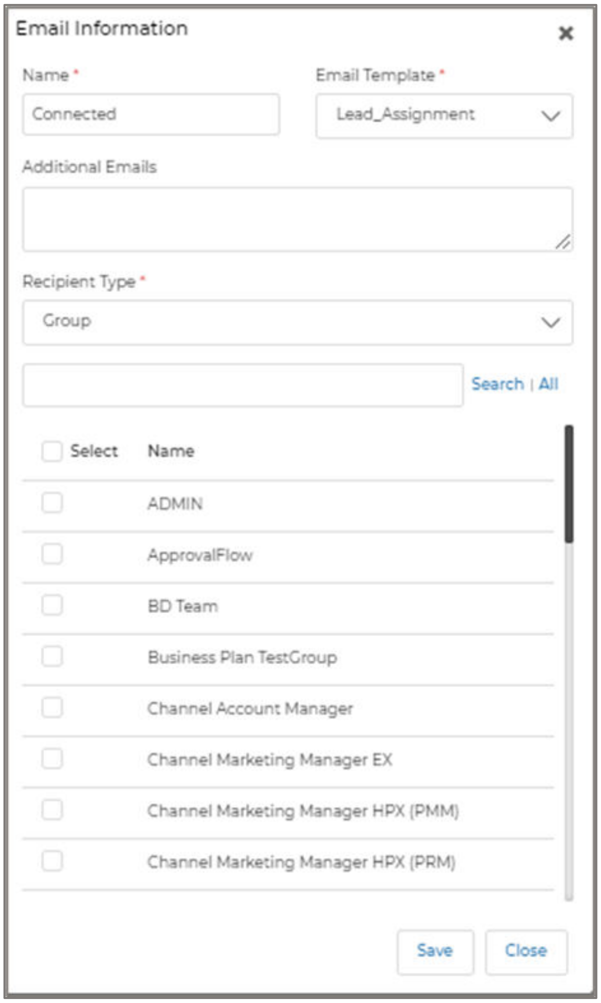
The Additional Actions are saved and respectively updated on the Workflow Canvas as per the following image and can be deleted through the respective delete icons against each of the Actions.



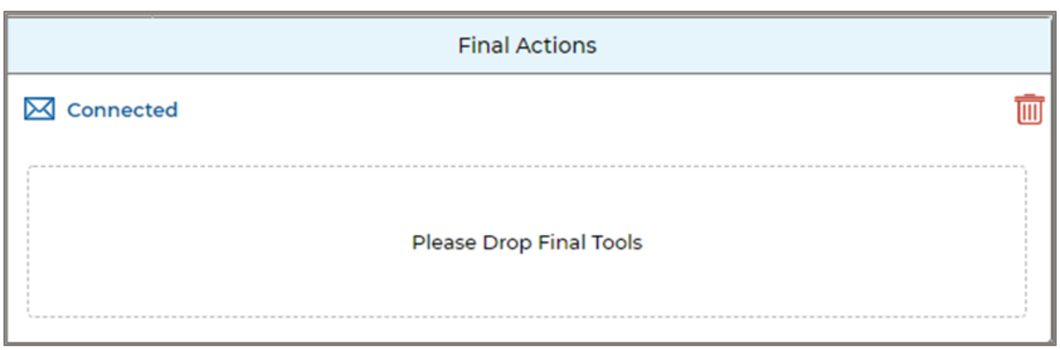
Email

In our example case, we had planned to setup the Workflow, to send out an email to the CMM, stating that the created Prospect's Lead Score being not equal to 50, is not being Pushed to SFDC. Thus, this Action would be provided in the False (Criteria Evaluated as False) Action Window. You need to drag-drop the Email Action from the Tool Bar to the Final Action window, which is basically the False Action Window.

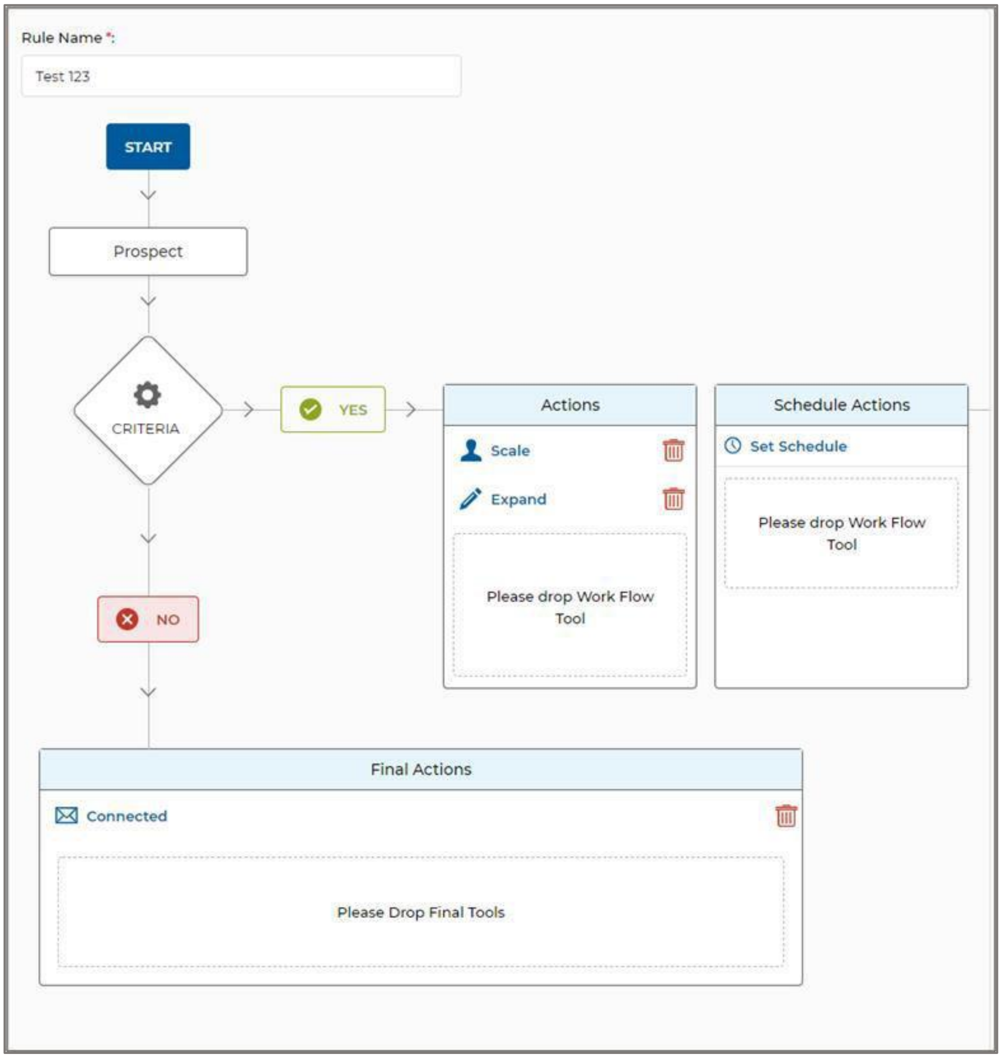
The Email Action lets you set up the following Email parameters, the Name of the Action, the Email Template, Recipient type – User/Group, the Group Name in case of Group and finally Saved.



The Workflow Canvas is updated with the Email Action and is displayed as the following:

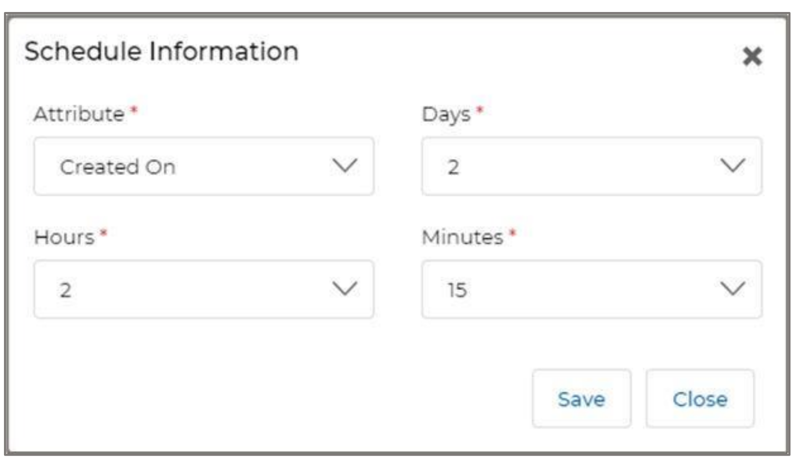


Thus, we have successfully created the Workflow as per our desired example case, and have the final Workflow as below:



Schedule Actions

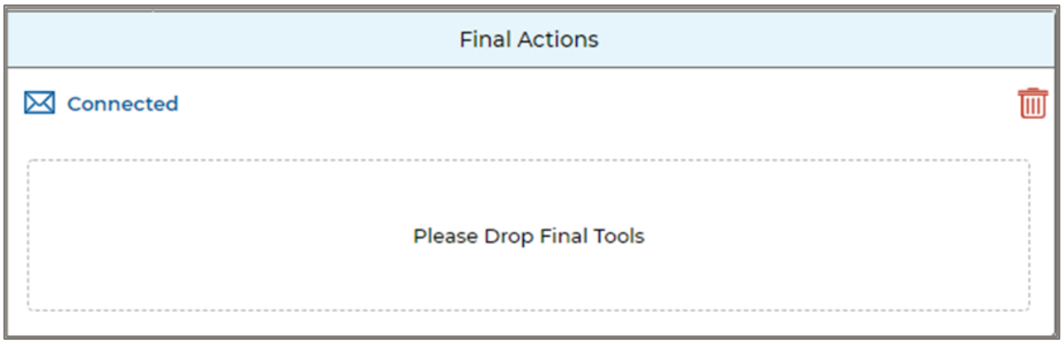
Schedule Actions can be set by setting the schedule initially, by providing the Attribute – Created on/Edited On and Schedule Duration (Days/Hours/Minutes) as per the figure provided below.



The Workflow can be saved, for future reference, and post-save can be Edited, Activated or Deactivated as per the business process requirement.

Final Action

Represents the last action/set of actions processed by the Work Flow. In our example case, when the criteria was evaluated as a false, Email Action was setup as the Final Action.

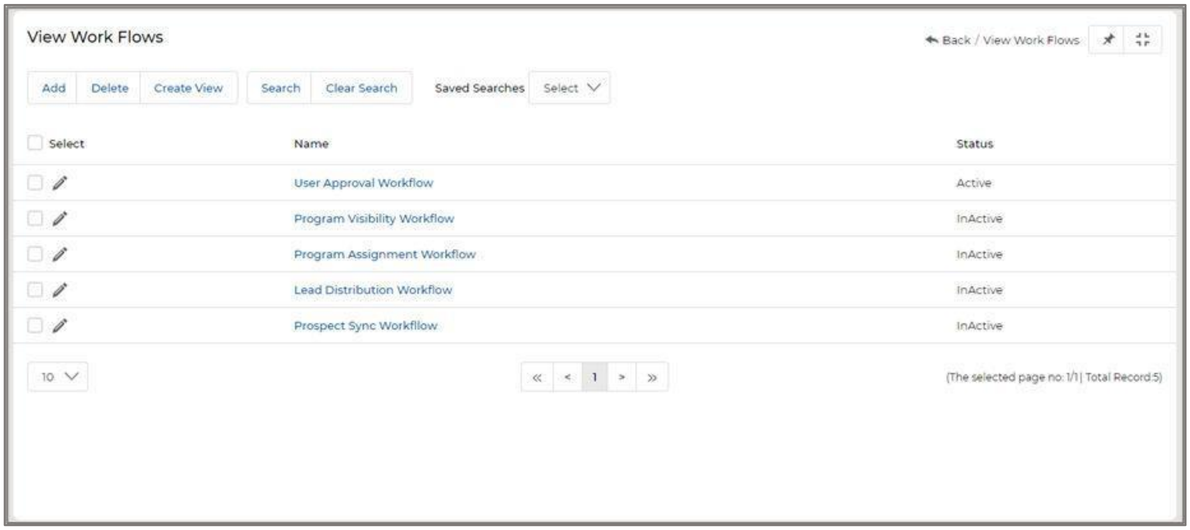


Work Flows

Manage Existing Work Flows

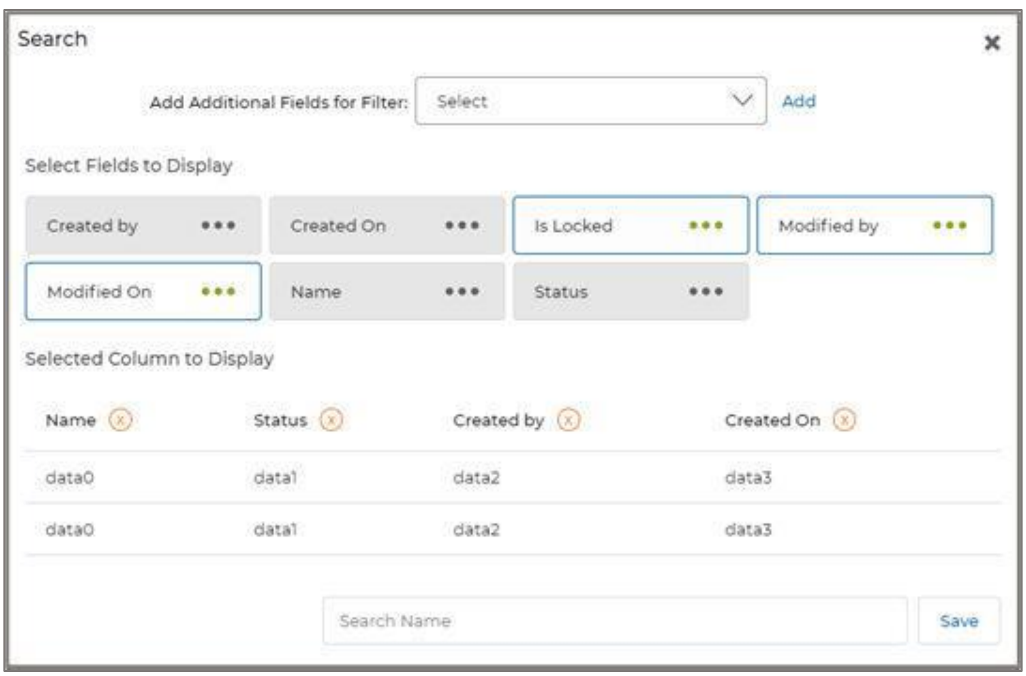
Looking Up for Existing Work Flow List

1. The top part of the page provides some actions:
    a. **Add** – Opens a new page to add a new record.
    b. **Delete** – Deletes selected record(s) from the listing page.
    c. **Create View** – Lets you create own view with set of columns as needed.
    d. **Search** – Opens a new pop-up window where you can put search criteria to find desired records.
    e. **Clear Search** – Clears the search made.
    f. **Saved Searches** – Shows a list of saved searches in the search dropdown. When selected, two more options are shown:
        i. **Edit** – Provides option to update the selected search name.
        ii. **Delete** – Deletes the selected search name from the search dropdown.
2. For each record in the grid, if you click on:
    a. **Edit (Pen icon)** – Lets you edit the selected record.
    b. **Any linkable item** – Takes you to its details page.



Create New View

1. Choose additional field and then click on **Add**.
2. Click on Green Dots to select the fields for display.
3. Selected columns are shown in the table. To remove a selected column from the display list – just click on the cross button.
4. Provide a View Name, and then click on **Save** to create the new view.

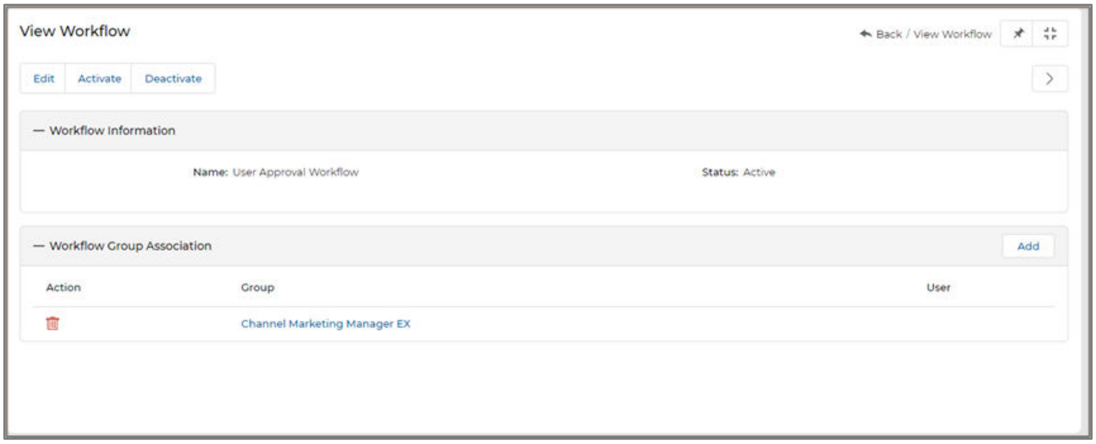


View Work Flow Details

1. The top part of the page provides some actions:
   a. **Edit** – Opens the selected flow in editable mode.
   b. **Activate** – Activates the flow.

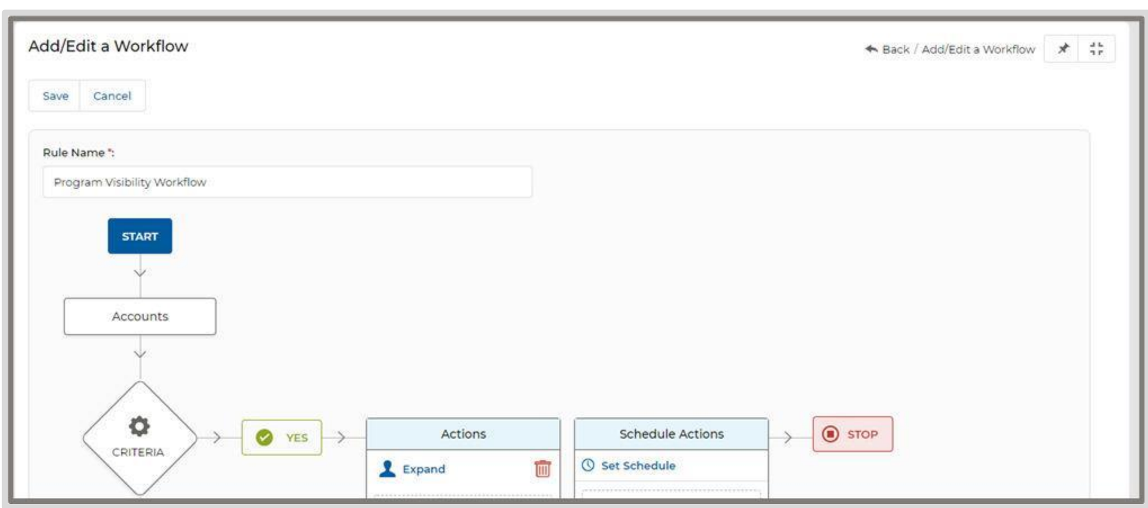
c. **Deactivate** – Deactivates the flow.

2. Displays Work Flow information.
3. Associates the Work Flow with group/user.
4. Click on the **Delete (Trash icon)** to delete group association.



Edit/Create a Work Flow

- Modify the flow as required (see the *Work Flow Tools* section above)
- Click on **Save**.



Convert Mapping

Converting a Prospect to a Contact

1. Click on the dropdown to choose between:
    a. **Convert to Prospect** – Converts contact to prospect.
    b. **Convert to Contact** – Converts prospect to contact.
2. Choose the destination database field where the source field content would be mapped. During conversion the source content data gets mapped to chosen destination field.
3. Click on **Save** when done.