

Created by MyCRM Ltd

# MyWorkflow

**Overview Guide**

REF – MyWorkflow.Overview.pdf

## About This Overview Guide

The purpose of this guide is to give a high-level overview of MyWorkflow and what functionality it delivers to significantly enhance Microsoft Dynamics 365, or when on premise or Partner Hosted, Microsoft Dynamics CRM 2016.

## Installation

Please refer to the separate MyWorkflow Installation and Configuration Guide for instructions. This overview guide assumes that MyWorkflow has been installed.

## MyWorkflow for Microsoft Dynamics 365

The MyCRM MyWorkflow application is a solution enhancement for Microsoft Dynamics 365. The latest version of MyWorkflow also works with CRM v2016 installations that are On-Premise or Partner Hosted.

All new MyWorkflow components have been designed to further extend and increase the available functionality and functions that can be used within Microsoft Dynamics 365 and CRM workflow jobs and processes.

MyWorkflow is a powerful business tool which enables business users to create a range of extended business automation activities, without the need to configure workflow using Dynamics 365 workflow design settings.

By deploying MyWorkflow, a Dynamics 365 business user will gain a range of new functions, including workflows functions for the following:

- Marketing
- Sales
- Dates Manipulation
- String Manipulation
- Number Calculations
- Manipulation of Regular Expressions
- Manipulation of Safe Web URL's
- Check Entity Type

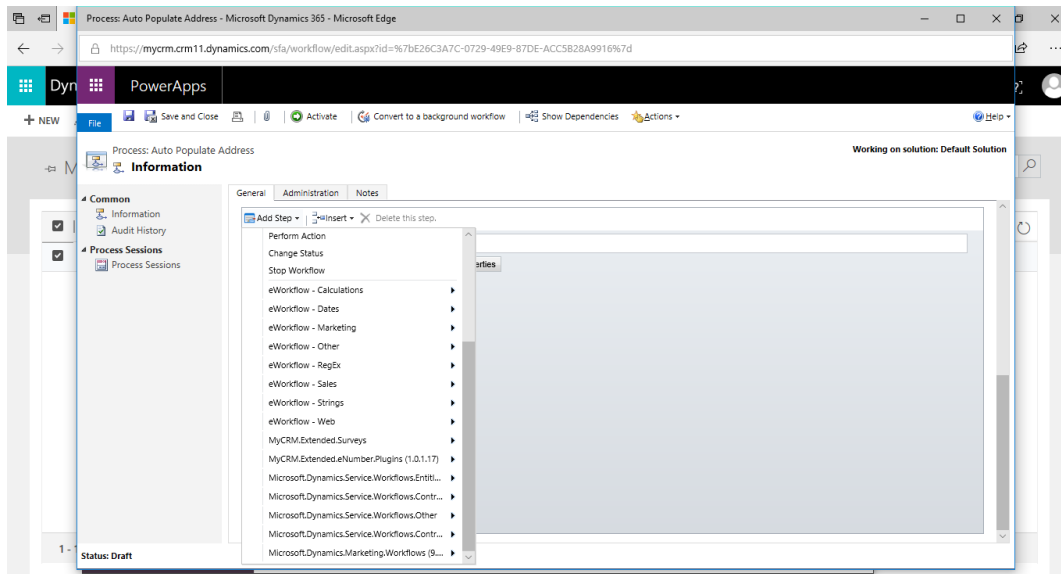
With eWorkflow we have provided a separate end user document that details each of the new function calls available with suitable examples that an end user may require for day to day use.

But as an example our new function calls in eWorkflow include manipulation of managing **Marketing Lists for members**, calculating the value of **All Invoice** or **All Orders** on a customer records, or counting the number of **Open or Closed Cases** for a customer.

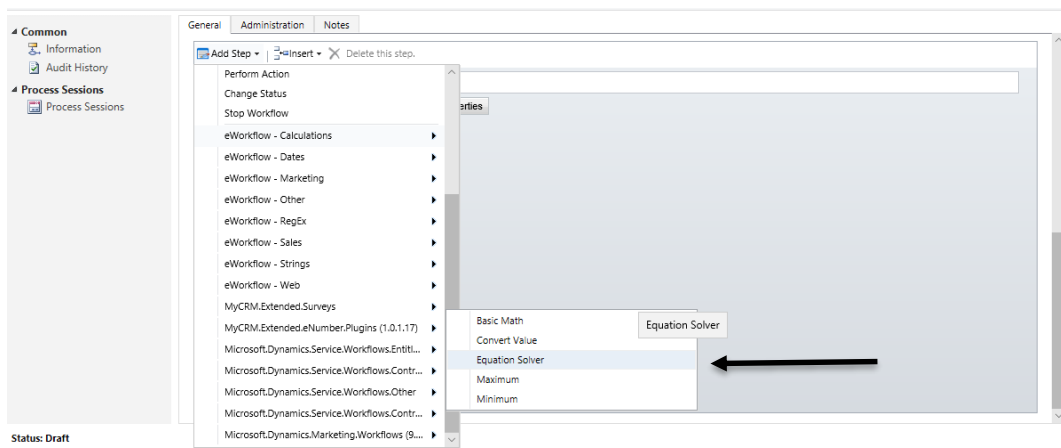
These are just a few examples of the new functions in the eWorkflow function Library.



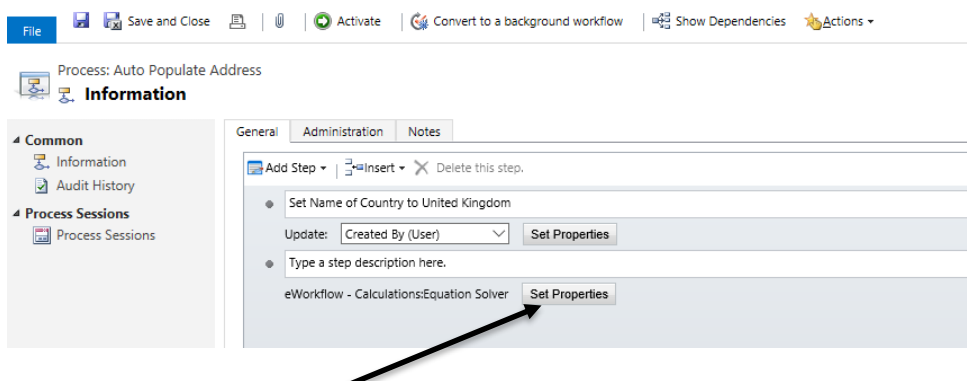
Seen (below) are the numerous workflow functions that extend the Steps that can be populated in workflow's design.



You can then select what is required to display the option under each function area

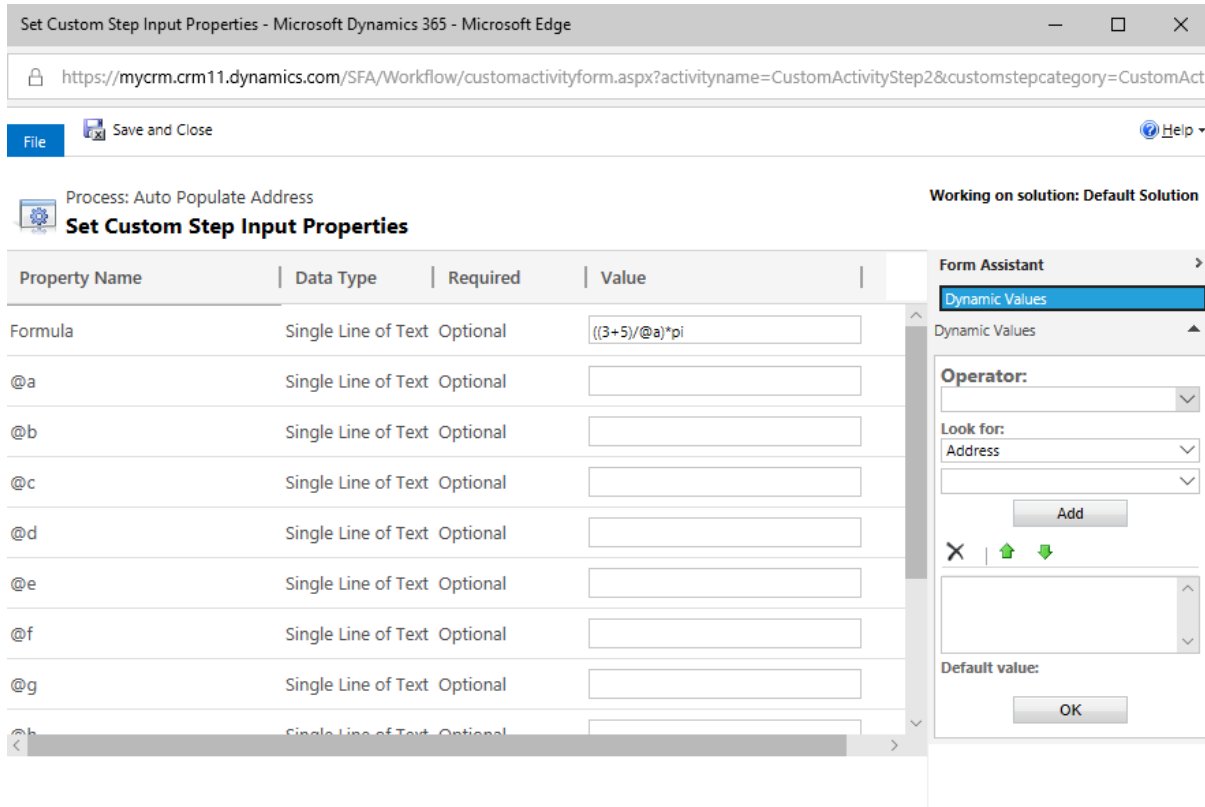


Set the properties accordingly



The following (below) configuration screen greets the users once the Set Properties button is selected.





In total MyWorkflow comprises of 42 highly effective Business functions. Each function provides a tremendous time saving by eliminating the need to design such workflow functions from scratch.

MyWorkflow provides a real world productivity gain and will help system implementers and system administrators of Dynamics 365 focus their attentions on other matters needing more manual intervention.

### Other MyCRM Enhancement Product Solutions

MyCRM offer a great many other productivity enhancements for Microsoft Dynamics 365, with each product solution delivering an array of key functional areas of improvement. Our product solutions deliver great value to businesses using Dynamics 365, with each product focused on delivering the all-important, great end user experience.

You can refer to other MyWorkflow documentation or the full user guide from the MyCRM Download Centre.

### For Additional Information

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