USER GUIDE

Created by MyCRM Ltd

MyWorkflow

Userguide Guide

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MyCRM Ltd

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About This User Guide

The main purpose of this document is to help end users gain insight and knowledge when using the latest release of MyWorkflow for Microsoft Dynamics 365.

The MyWorkflow function Library contains 42 workflow functions that increase productivity and enhance the workflow capability enhancing business automation and processes.

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MyWorkflow – Marketing

In the MyWorkflow Marketing Helper Library we have included 4 additional function calls that can be used against an Account, Contact or Lead.

Function – GetLastCampaignForMember

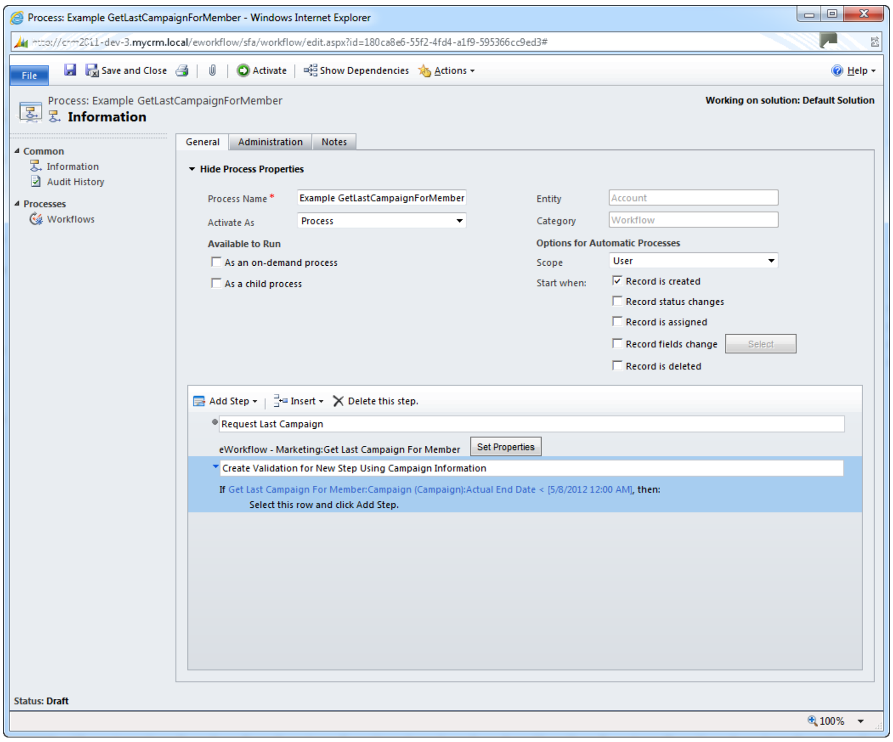
This function call enables a user to return the last campaign that an Account, Contact or Lead was entered into, by having this information via a workflow a business process can easily be created to see if a customer type is responding to campaigns or if a customer has been involved in to many campaigns.

This function will return the actual campaign or return null if none campaign exist.

If a campaign is returned information about that campaign can be used on the Account, Contact or Lead Record an example may be the return of the campaign last date

Function Call :- Input
Select Contact
Select Account
Select Lead

Example 1.1



The above example shows the call to the last campaign which returns a full Campaign data set that can then be used for validation in the workflow.

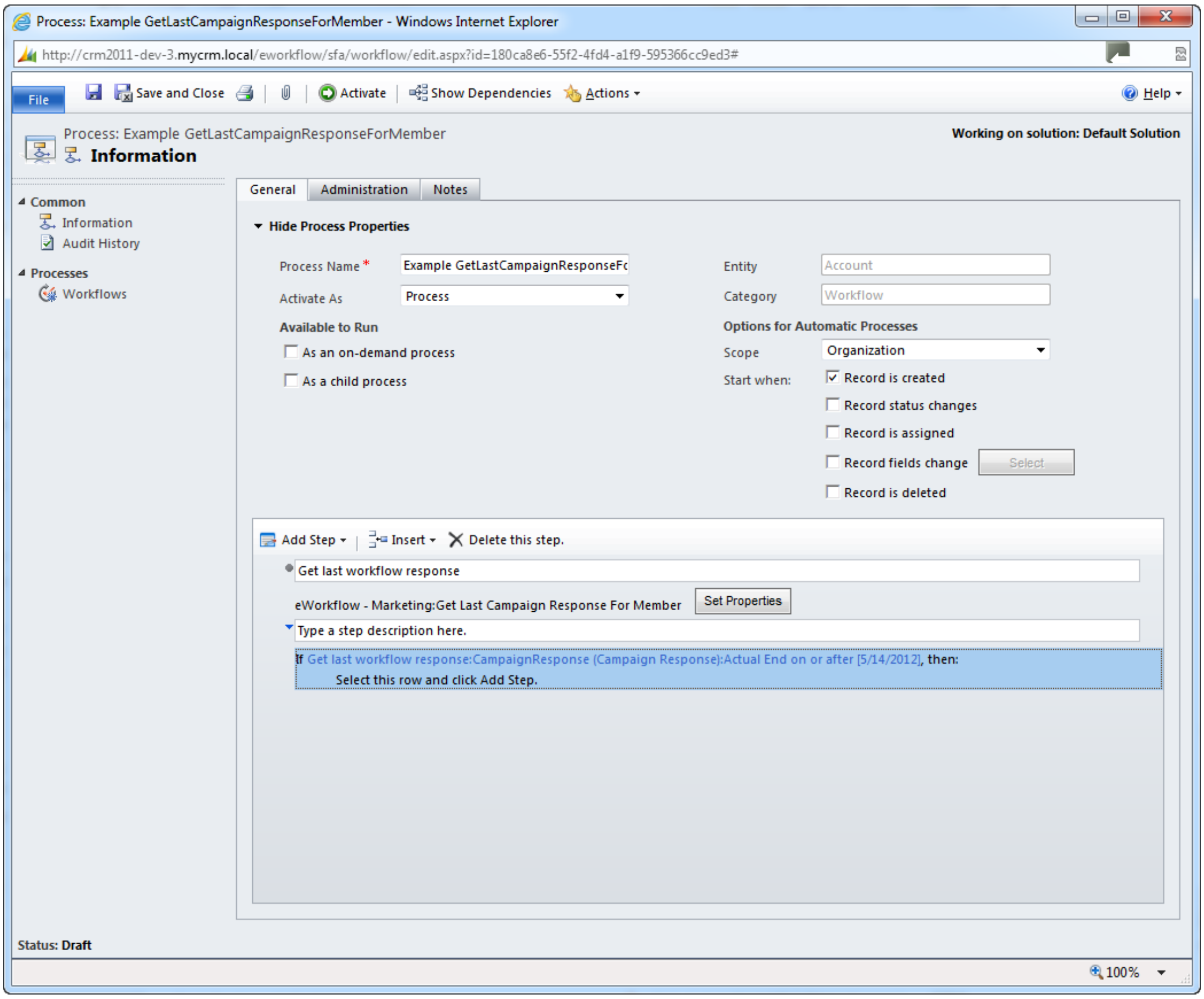
Function Call :- Output
All Campaign Fields on the Published Form

Function - GetLastCampaignResponseForMember

This function call can be used in a workflow process to return the last campaign activity response that was created for an Account, Contact or Lead record and the data from the Campaign Response Activity can be used in verification of the workflow process and steps.

Function Call :- Input
Select Contact
Select Account
Select Lead

Example 2.1



You can see as an example we have used the call to get the last activity and then used a check condition on one of the activity end date, to then create or update a record.

Function Call :- Output
All Campaign Response Fields on the Published Form

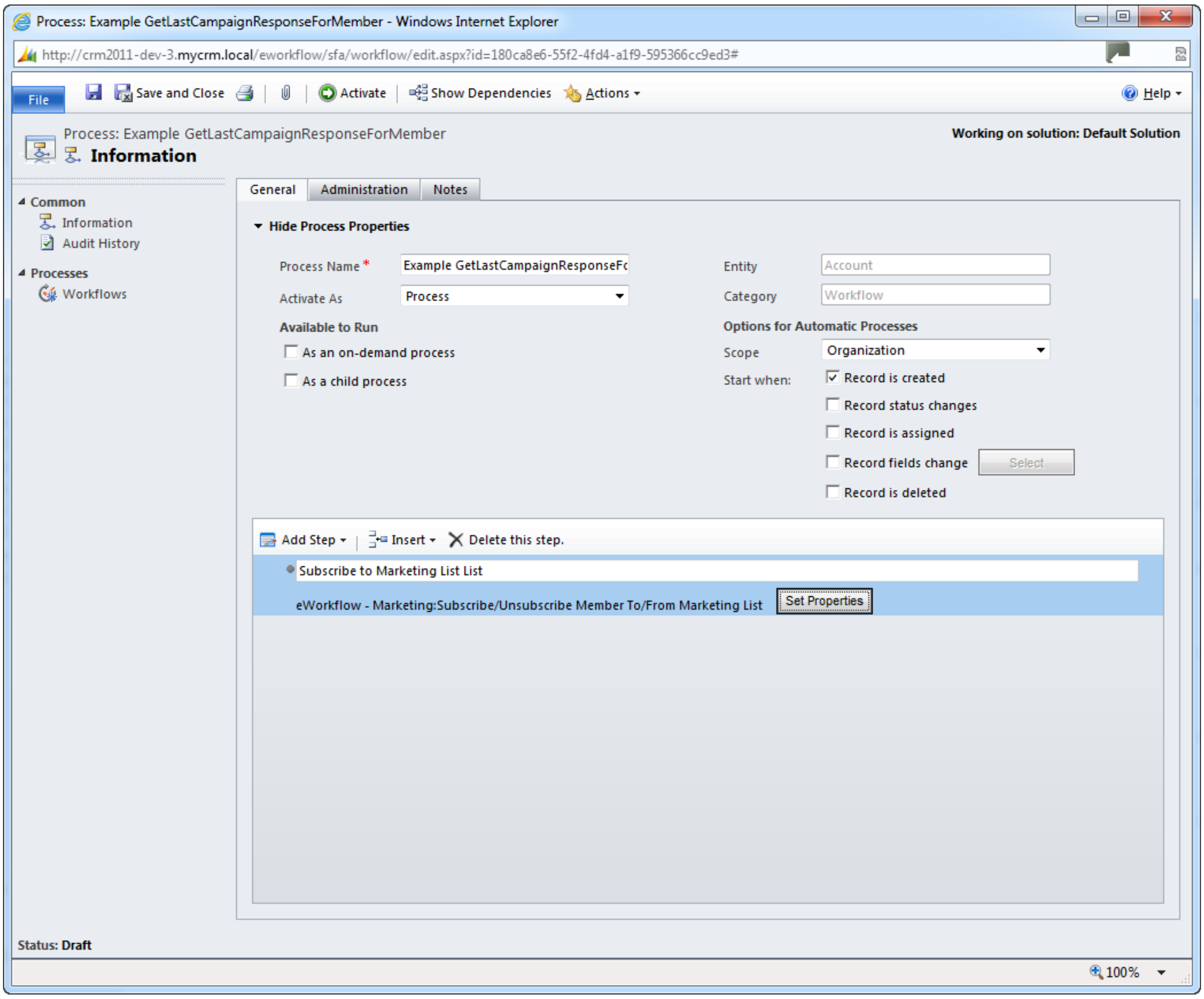
Function – MarketingSubscribeUnSubscriberMember

This function call is a great asset to enable the creation of Marketing Lists through Workflow, Using this you can automate the adding of members i.e. Accounts, Contacts or Leads to a defined list via workflow, you can also use the IsAMarketingListMember function to see if a lead or contact is already on a list.

The advantage of having this function means that when new Accounts, Contacts or Leads are created in the CRM these records are added to a list or can be added to separate lists, without delay or expecting Marketing to manually build lists for new contacts

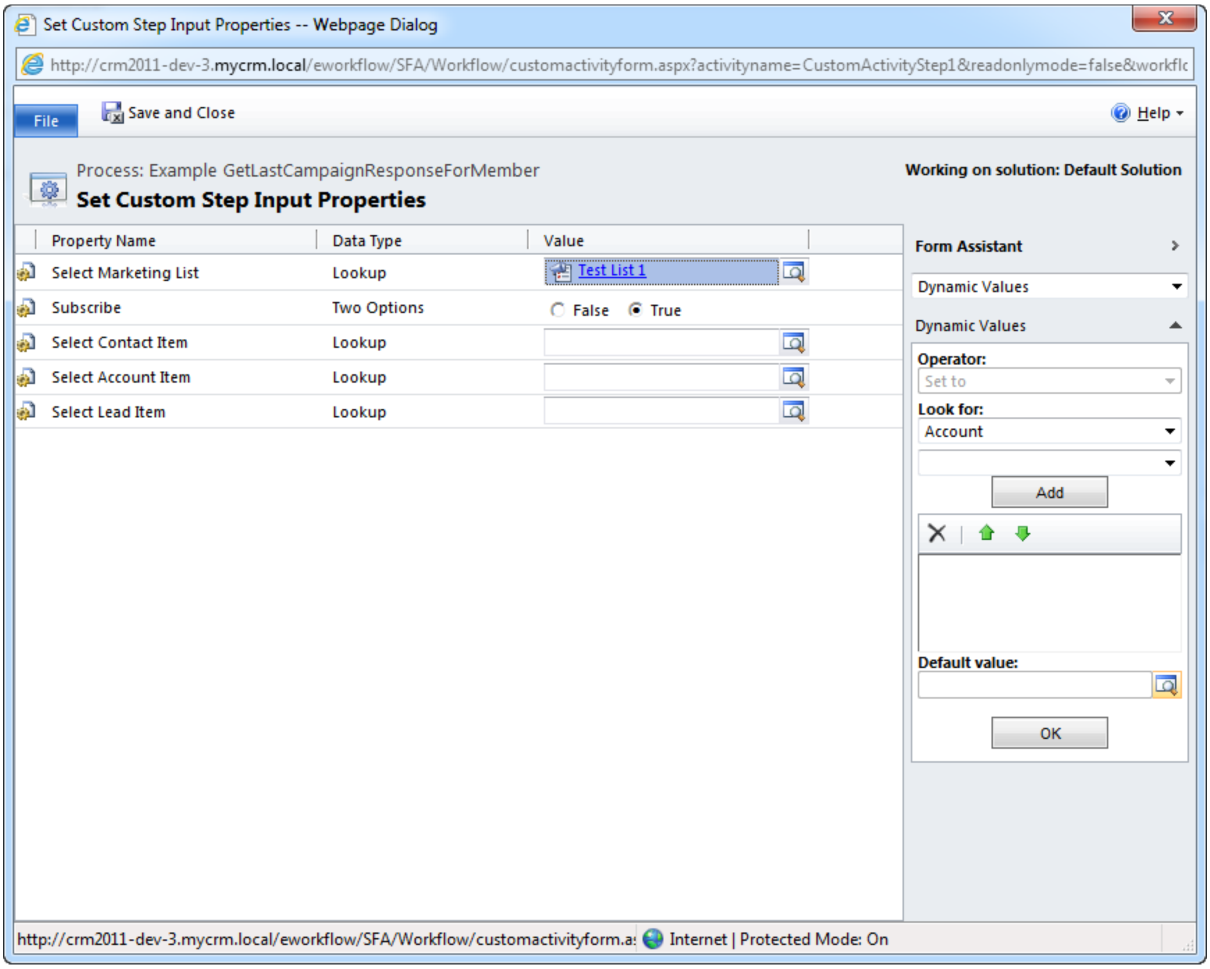
Function Call :- Input
Select Marketing List
Subscribe (True / False)
Select Contact
Select Account
Select Lead

Example 3.1


Process: Example GetLastCampaignResponseForMember - Windows Internet Explorer
http://crm2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=180ca8e6-55f2-4fd4-a1f9-595366cc9ed3#
File
Save and Close
Activate
Show Dependencies
Actions
Help
Process: Example GetLastCampaignResponseForMember
Information
Working on solution: Default Solution
Common
Information
Audit History
Processes
Workflows
General
Administration
Notes
Hide Process Properties
Process Name
Example GetLastCampaignResponseFc
Activate As
Process
Available to Run
As an on-demand process
As a child process
Entity
Account
Category
Workflow
Options for Automatic Processes
Scope
Organization
Start when:
Record is created
Record status changes
Record is assigned
Record fields change
Select
Record is deleted
Add Step
Insert
Delete this step.
Subscribe to Marketing List List
eWorkflow - Marketing:Subscribe/Unsubscribe Member To/From Marketing List
Set Properties
Status: Draft
100%

To set this function the properties will need to be selected for the Marketing List and if this is a Add or a remove.

Example 3.2



The same function is used to remove members from a Marketing list so if a contact or an Account or even a lead is disabled the automation of Marketing List management is done in a workflow process.

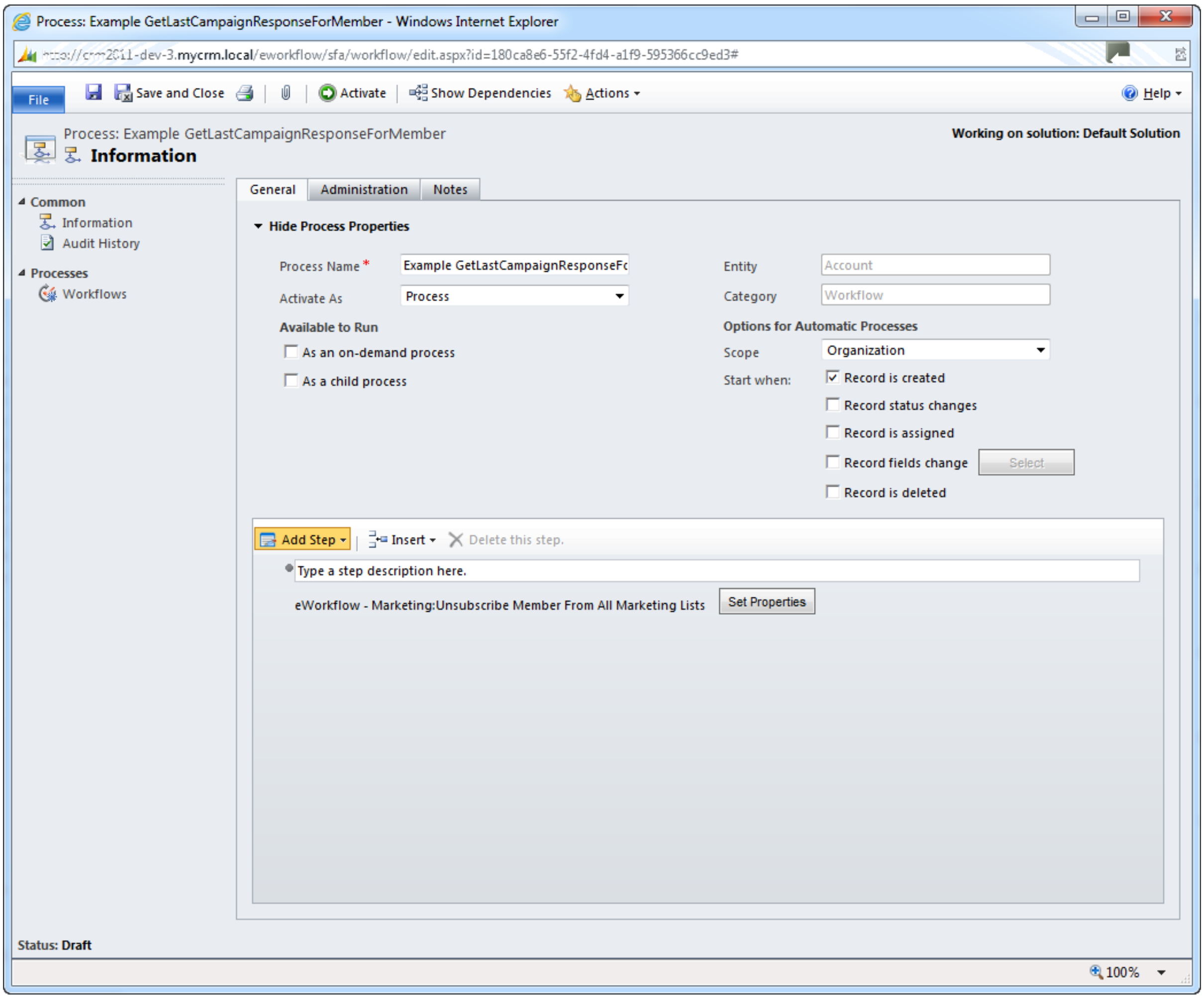
Function – UnsubscribeMemberFromAllMarketingLists

Another great marketing function that enhances the management of Marketing Lists in CRM for Account, Contacts or Leads is the ability to enable a single function call to be used against these record types and have them removed from any Marketing List in the CRM System.

This is likely to be required if an Account, Contact or Lead is disabled, as an example this is likely to be used when a Lead is qualified and a lead becomes a contact and a requirement to move to a different list is needed.

Function Call :- Input
Select Contact
Select Account
Select Lead

Example 4.1



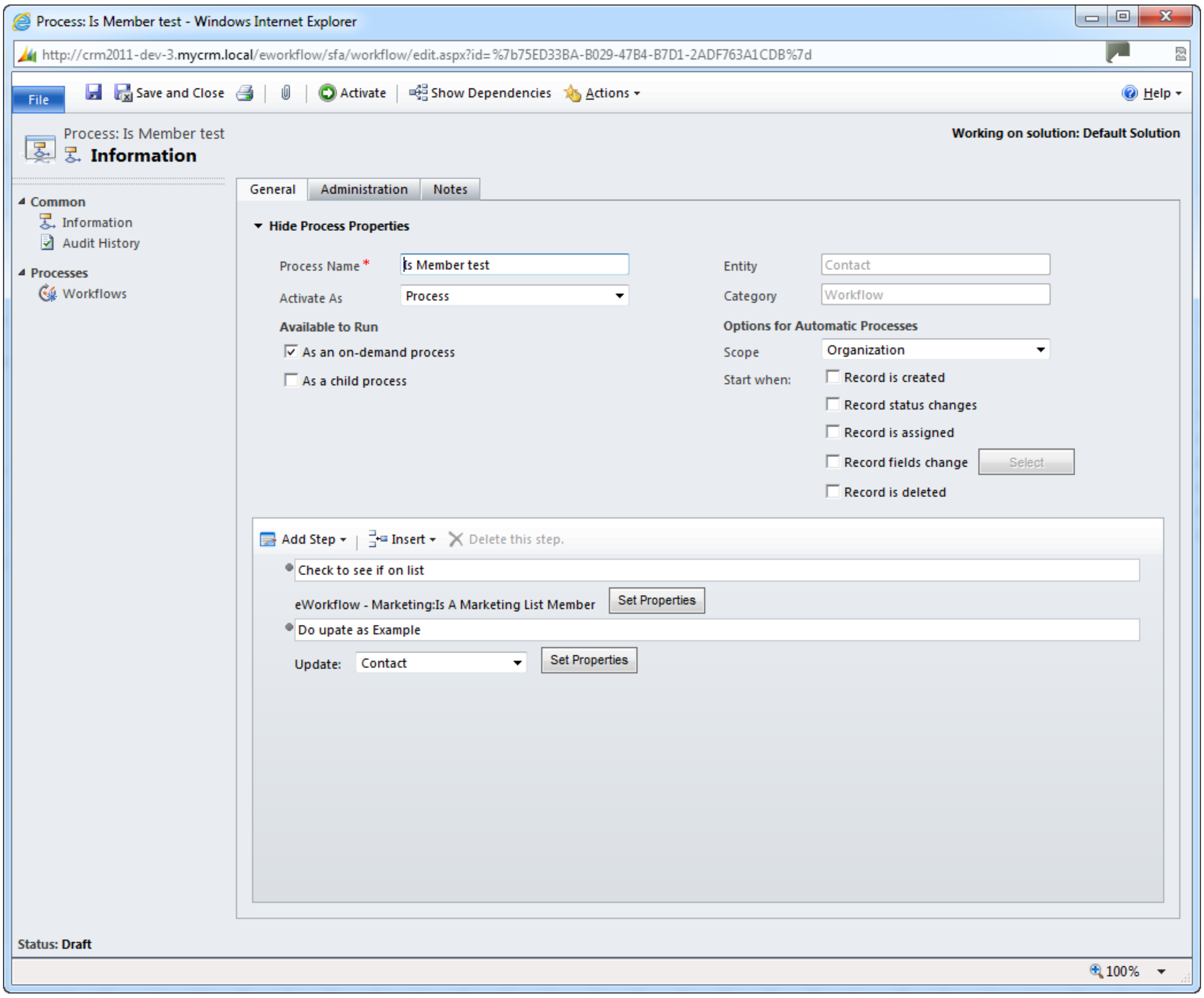
Function – IsAMarketingListMember

This function can be used to check if an Account, Contact or Lead is already on an existing Marketing list, this helps with business process where one of the Account, Contact or Lead records changes its status or in the case of a Lead progresses through the Sales Cycle.

The workflow function will return a True or False and from there a process can be completed.

Function Call :- Input
Select Contact
Select Account
Select Lead
MarketingList

Example 5.1


Process: Is Member test - Windows Internet Explorer
http://crm2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=%7b75ED33BA-B029-47B4-B7D1-2ADF763A1CDB%7d
File
Save and Close
Activate
Show Dependencies
Actions
Help
Process: Is Member test
Information
Working on solution: Default Solution
Common
Information
Audit History
Processes
Workflows
General
Administration
Notes
Hide Process Properties
Process Name
Is Member test
Activate As
Process
Available to Run
As an on-demand process
As a child process
Entity
Contact
Category
Workflow
Options for Automatic Processes
Scope
Organization
Start when:
Record is created
Record status changes
Record is assigned
Record fields change
Select
Record is deleted
Add Step
Insert
Delete this step.
Check to see if on list
eWorkflow - Marketing:Is A Marketing List Member
Set Properties
Do upate as Example
Update:
Contact
Set Properties
Status: Draft
100%

MyWorkflow – Calculations

Our Calculation set extends the workflow capabilities even further with the option to perform standard calculations within workflow when either a record is created; Update or a field is changed. A number of new workflow function calls are available

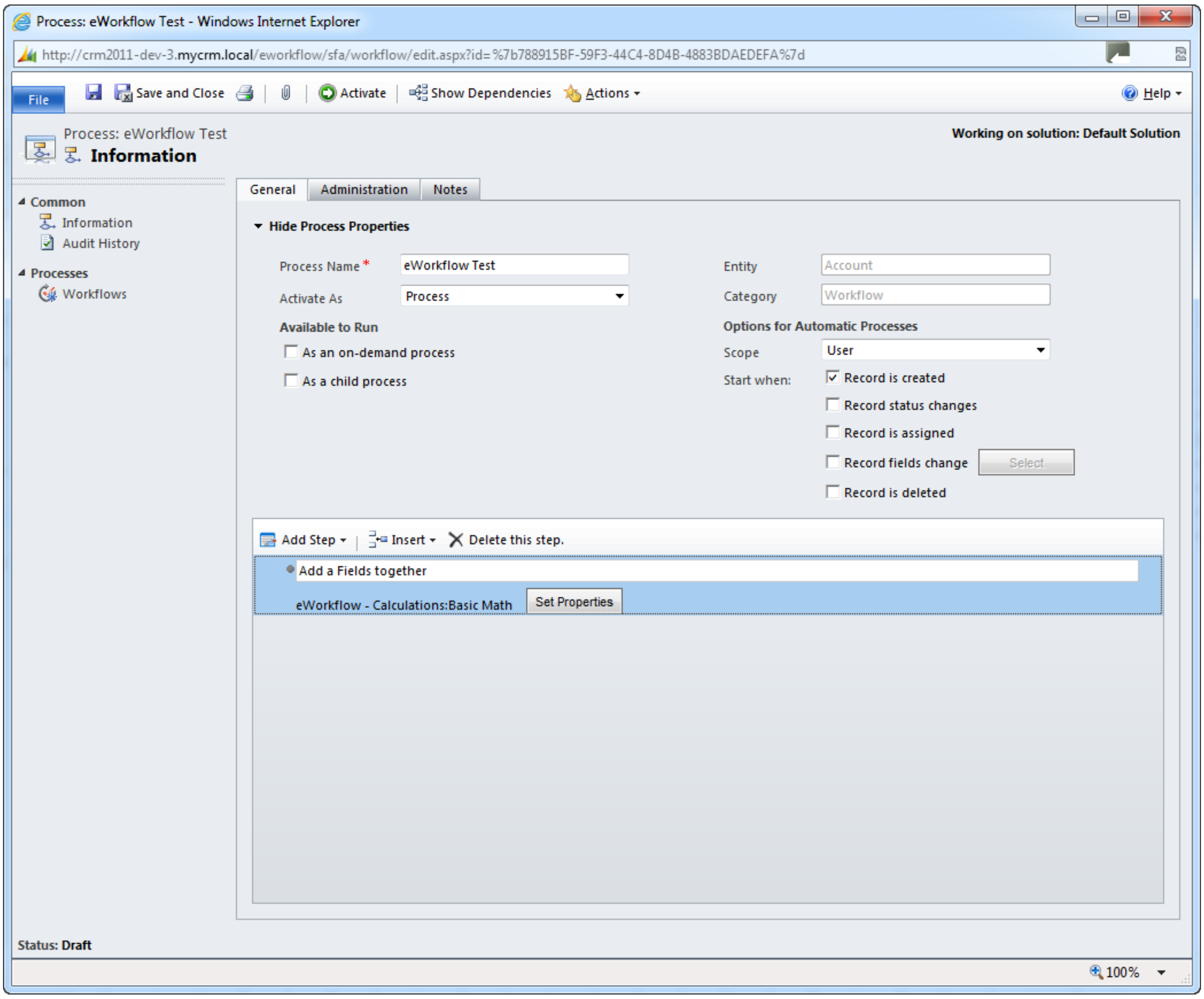
Function – BasicMath

This function allows you to automate calculation on different record types, as an example a credit limit could be set on an account and the available balance be set by taking the total of unpaid invoices minus the limit

This would be just 1 example but this workflow call extends number manipulation even further with CRM workflow.

Function Call :- Input
First Number
Second Number
Symbol

Example 6.1



Basic math calculation enables +, - / and * functions to be applied to number fields.

Function Call :- Output
Result (Number)

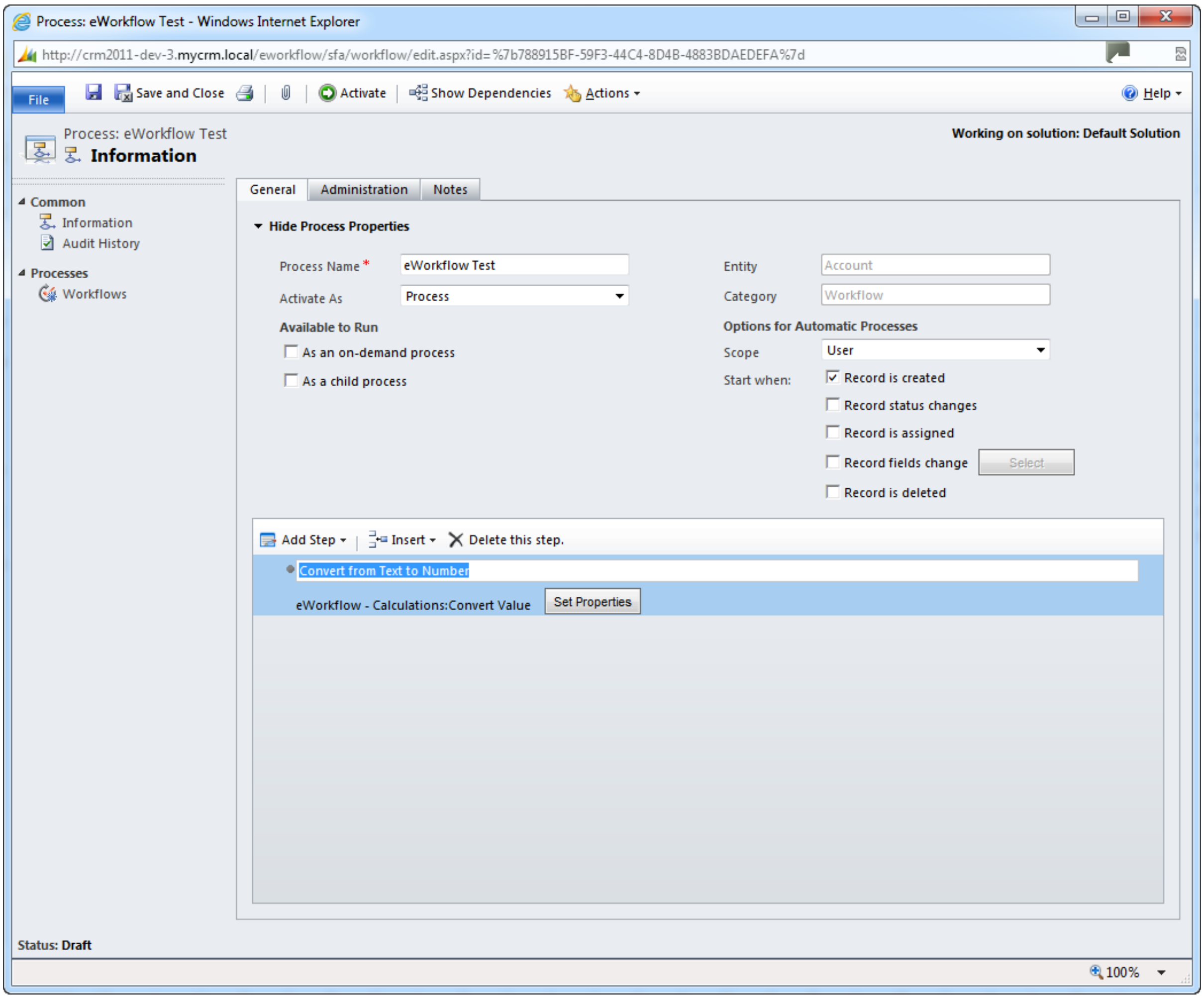
Function – ConvertTextToNum

This workflow function enables the conversion of number type from Text and outputs a number of options so that a record or data can be manipulated

The number based in the Text fields is output in the following formats after the function is run

Function Call :- Input
Value to Convert

Example 7.1



Function Call :- Output
Decimal (Number)
Money (Money)
Float (Float)
Rounding Number
Truncated Number
Processing Error (error)

Function – EquationSolver/SumUp

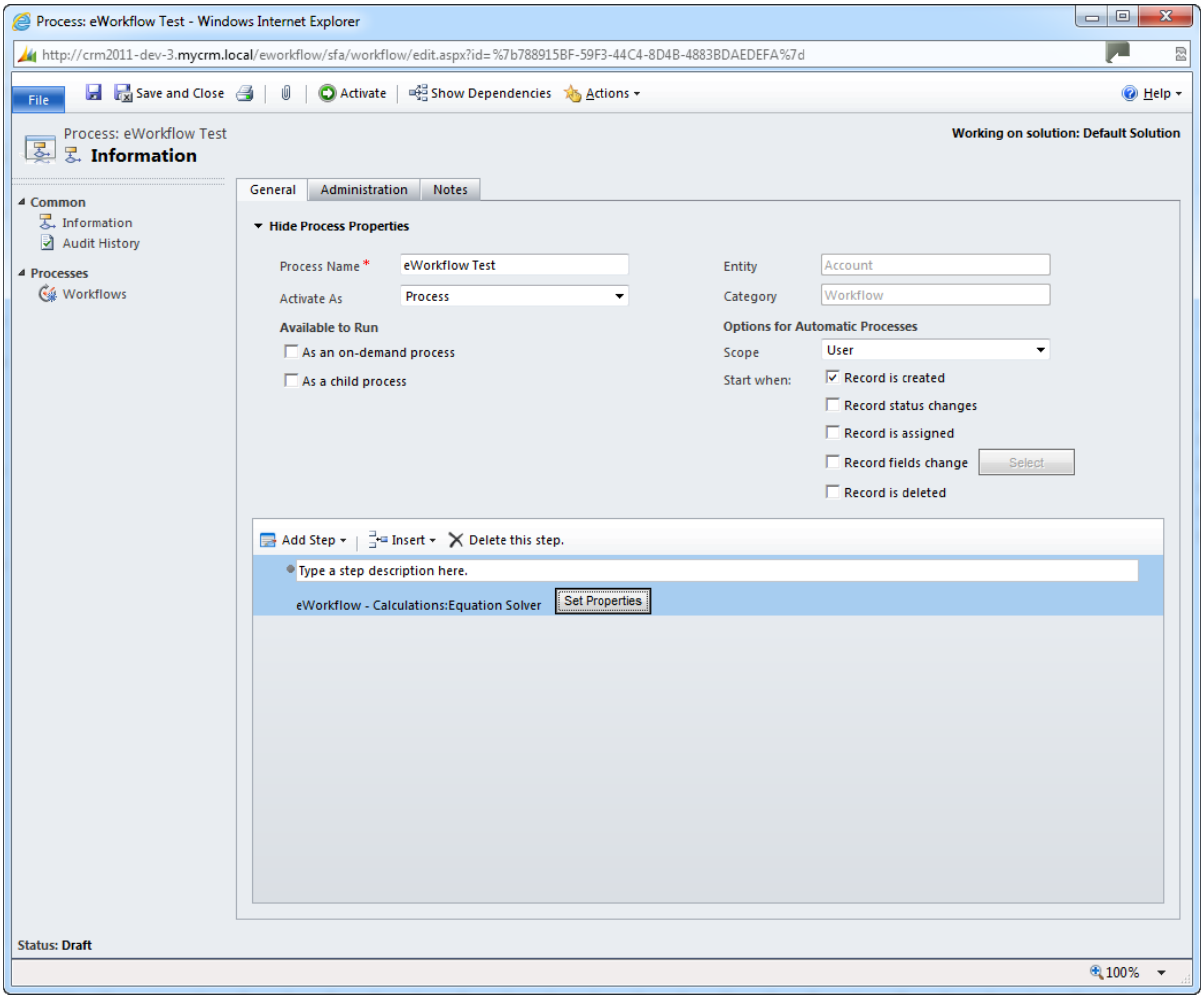
This great extended function enables an end user to perform complex or standard calculations on a given number in the CRM record where the workflow is applied

This work flow allows you to enter a calculation either fixed or based on values from other CRM fields ad return a calculated value which can be used to update different field in the record.

An example may be calculating a commission value from the value of an opportunity or an Order.

Function Call :- Input
Formula (text)
@a (text)
@b (text)
@c (text)
@d (text)
@e (text)
@f (text)
@g (text)
@h (text)
@i (text)
@x (text)
@y (text)
@z (text)

Example 8.1



Function Call :- Output
String (Text)
Money (Money)
Float (Float)
Rounding Number
Truncated Number
Processing Error (error)
Error Message (text)

Function – CalculateMaximum

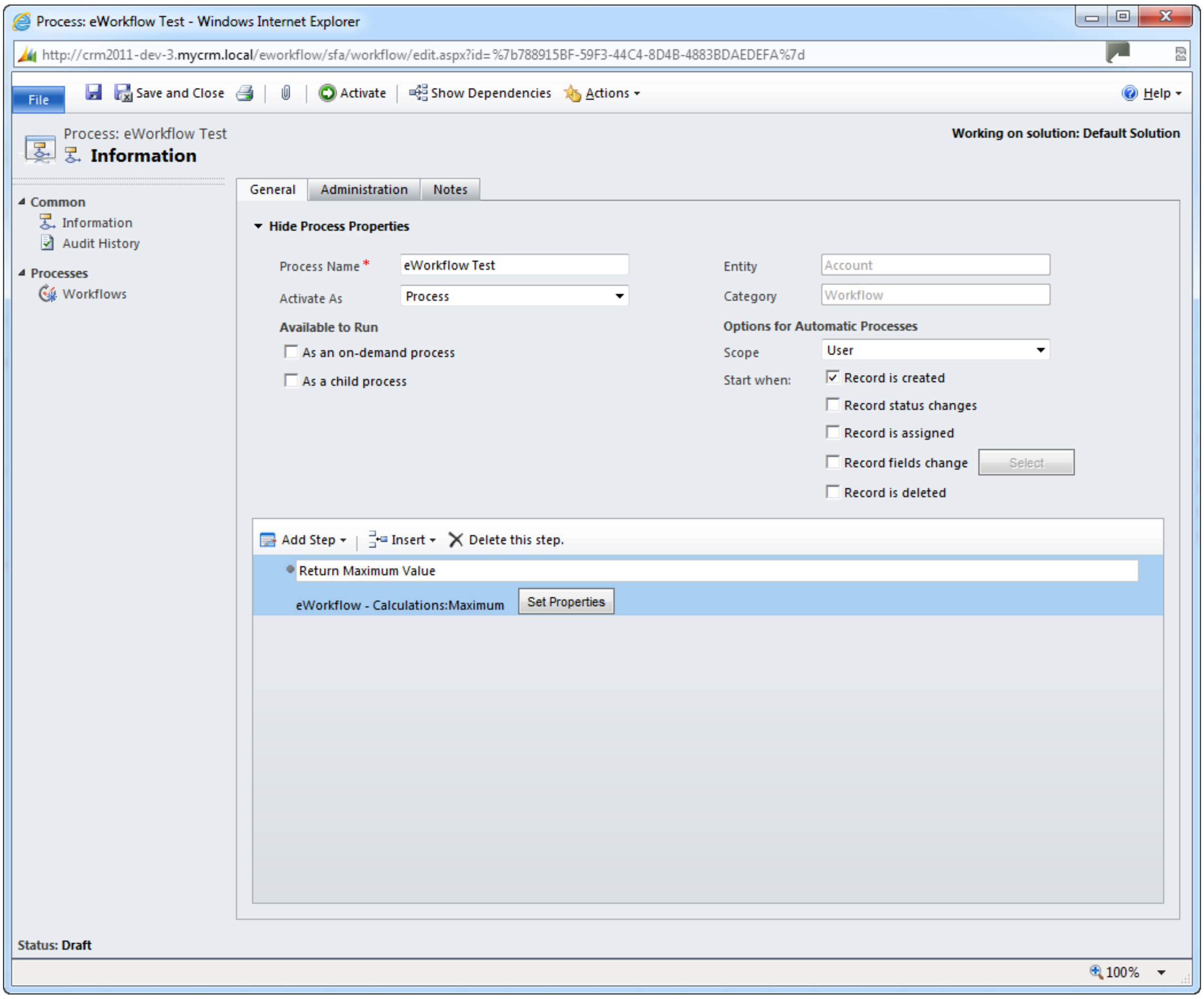
This extended workflow offers a business and end user the flexibility of performing a validation check against data held on CRM record,

An example might be that as Part of an SLA the Maximum wait time is 8 Hours, a business user creating a workflow you may want a wait statement on the account record that polls for the maximum amount of Time.

Another example may be a validation check for a credit limit, and if the Maximum is returned then a task is performed as an alert.

Function Call :- Input
First Number
Second Number

Example 9.1



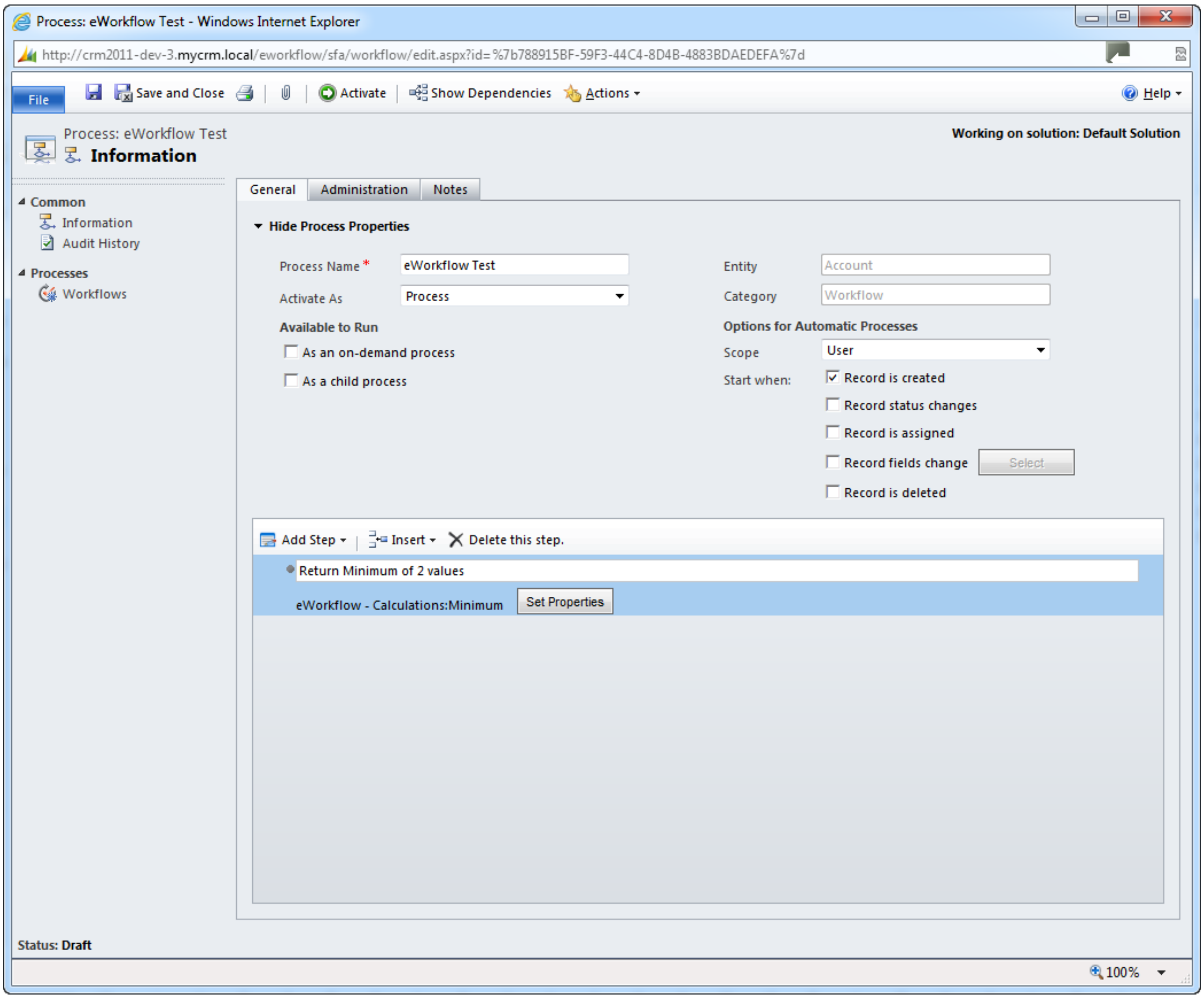
Function Call :- Output
Result (Number)

Function – CalculateMinimum

This workflow function will return the lower value of 2 numbers so again could be used as part of a wait statement for an account, contact to reach a certain level.

Function Call :- Input
First Number
Second Number

Example 10.1



The validation of the wait check used could then run additional steps or call child workflows.

Function Call :- Output
Result (Number)

MyWorkflow – Dates

As part of the MyWorkflow library we have included a number of popular date manipulation functions that are support and easy to use.

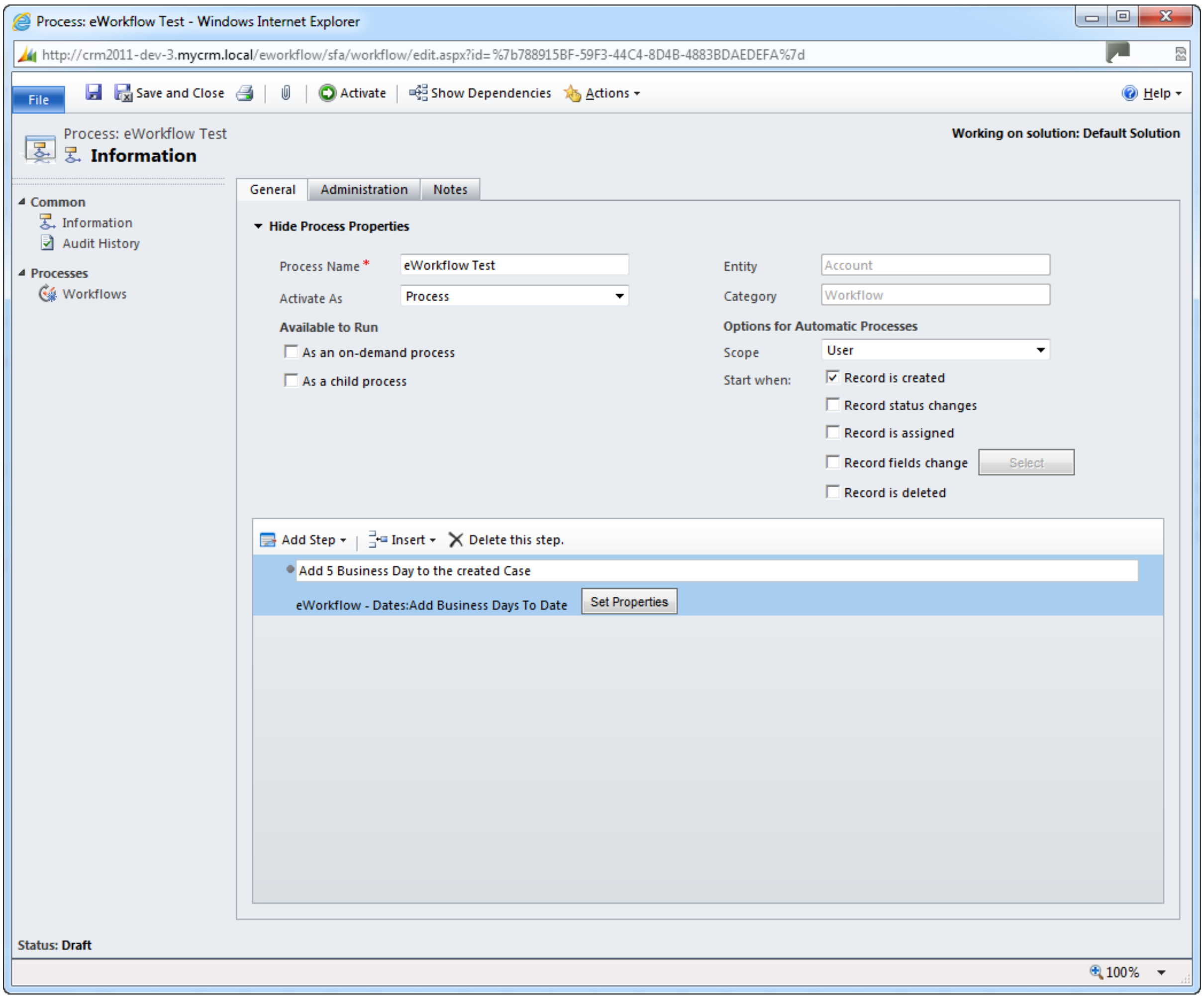
Function – AddBusinessDaysToDate

There are many examples where in a business process you would only want to add the related business days to a required part of a calculation, in most cases these would include follow up activities or the creation of Cases that are under SLA.

As an organisation you may have a standard business process to respond to an enquiry within 3 Business Days, now with MyWorkflow you can perform this calculation.

Function Call :- Input
Start Date (Date)
Check to validate if Date is Business Day (True / False)
Days To Add (Whole Number)
Hours To Add (Whole Number)
Minutes To Add (Whole Number)

Example 11.1



Note this function can also be used to add Hours and Minuets, to a date calculation

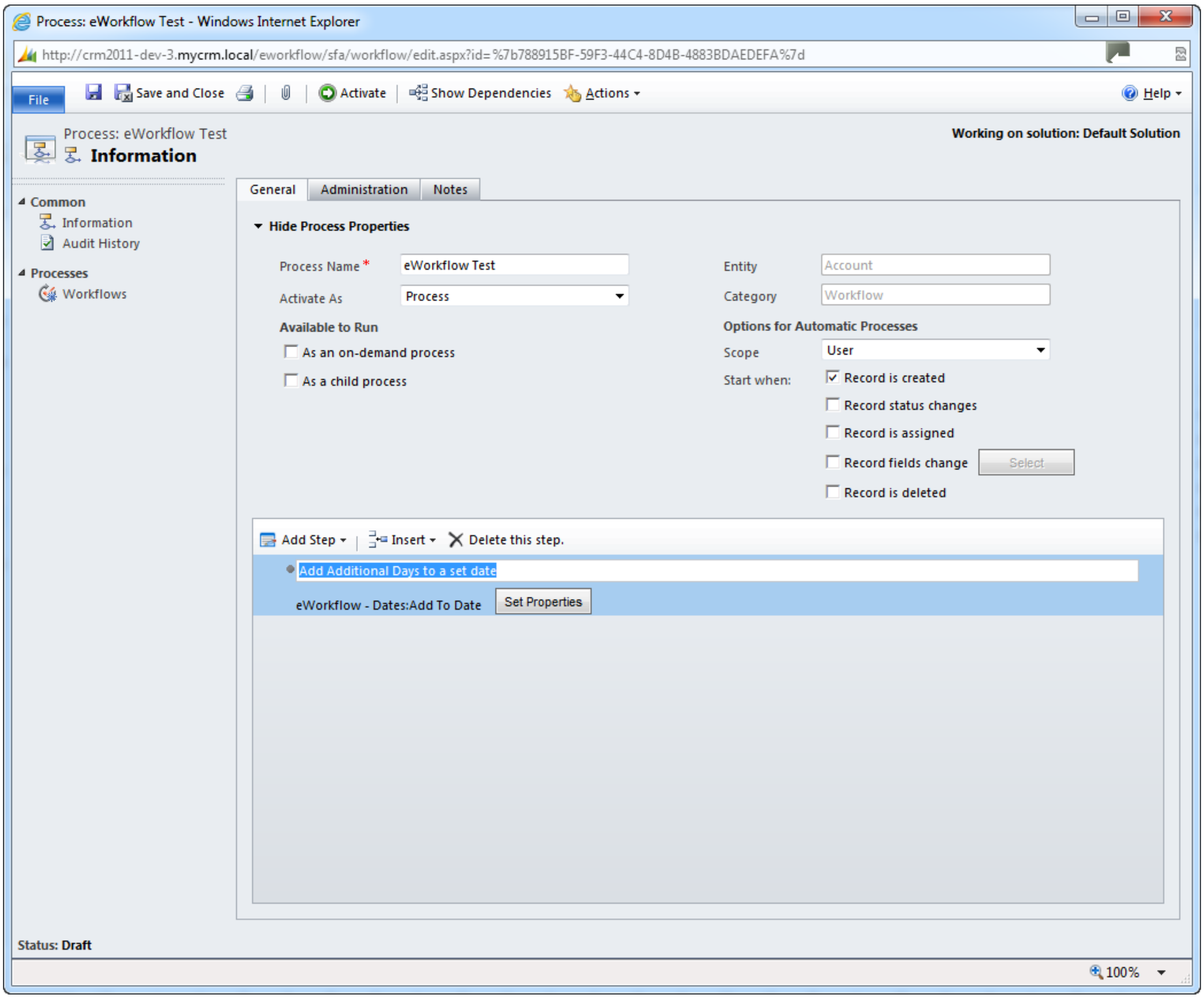
Function Call :- Output
Result (Number)

Function – AddToDate

Extending the standard CRM functions, as the date calculation can now be set prior to creating or updating the relevant date on a record or creating a new activity, this give additional flexibility when call child workflows.

Function Call :- Input
Start Date (Date)
Years to Add (Whole Number)
Months to Add (Whole Number)
Weeks to Add (Whole Number)
Days To Add (Whole Number)
Hours To Add (Whole Number)
Minutes To Add (Whole Number)

Example 12.1



Function Call :- Output
Result (Number)

Function – DateDifference

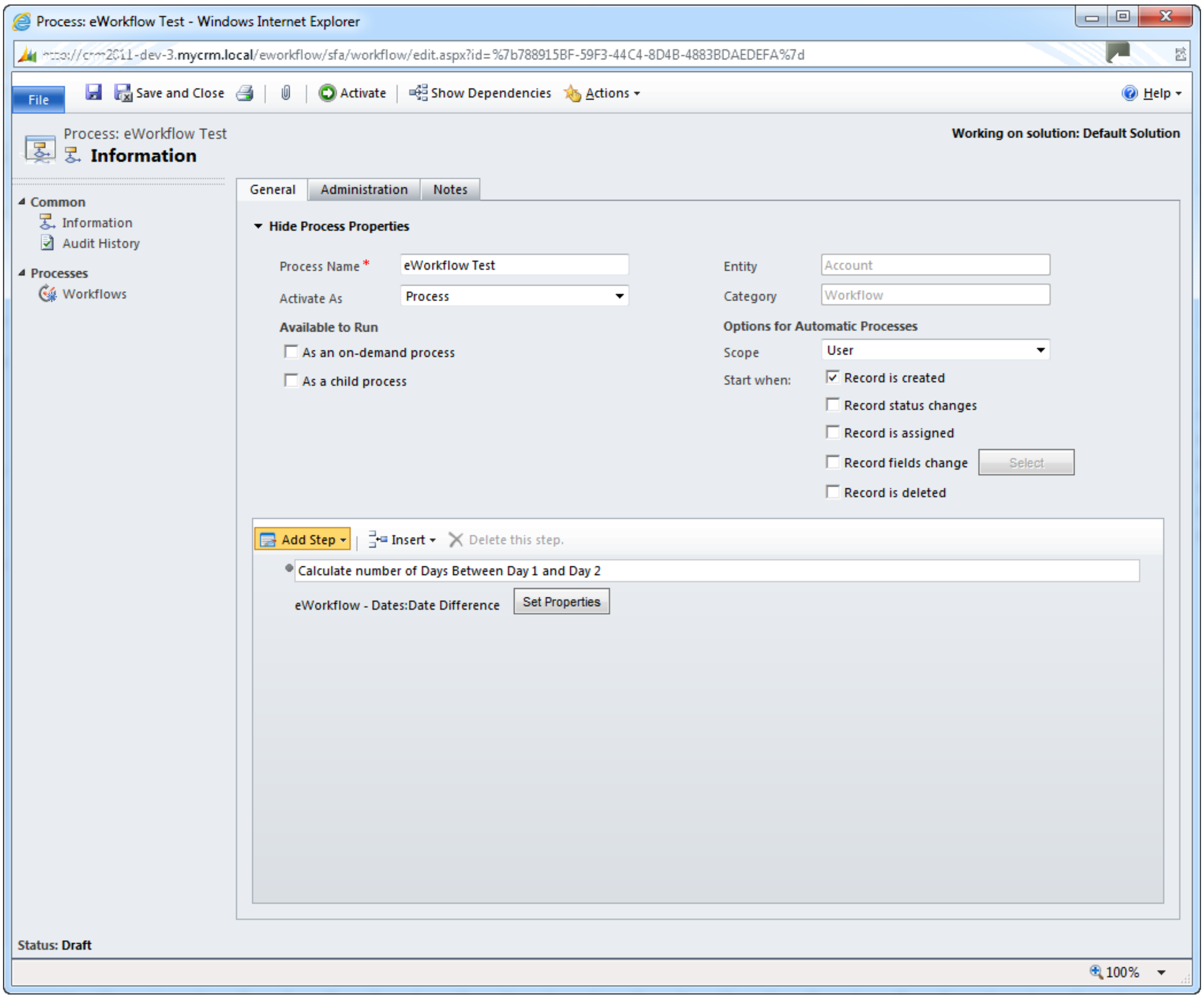
This is a great feature to calculate the number of actual days between two dates given. Dates given as part of an equation or check statement will return a integer number of actual days.

You can also use the **DateDifferenceBusinessDays** which will calculate the difference but only return the Mon to Friday Count

Function Call :- Input
Date 1 (Date)

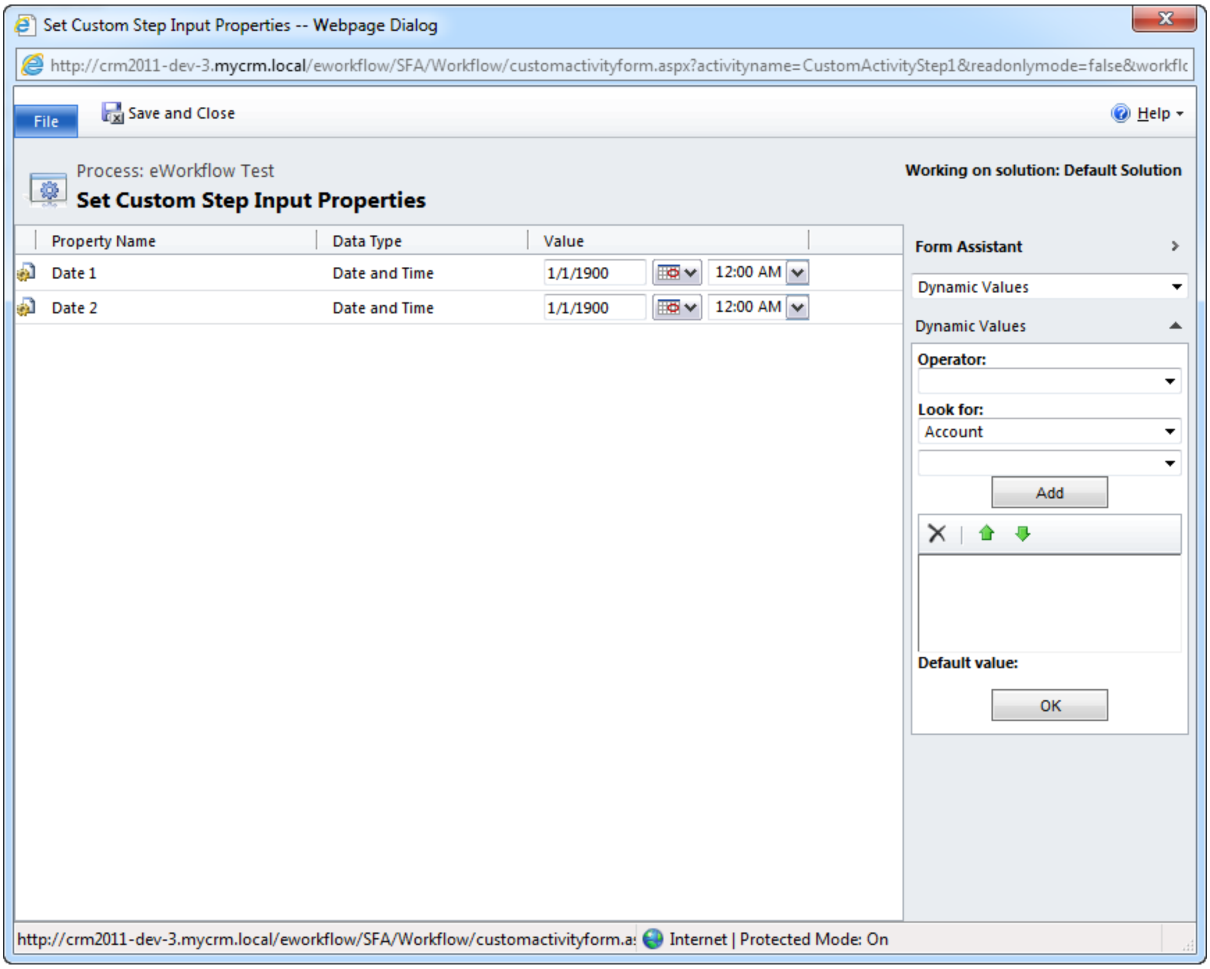
Date 2 (Date)

Example 13.1



Dates are entered by setting the parameter on the settings screen

Example 13.2



Function Call :- Output
Days (Whole Number)
Hours (Whole Number)
Minutes (Whole Number)
Total Days (Whole Number)
Total Hours (Whole Number)
Total Minutes (Whole Number)

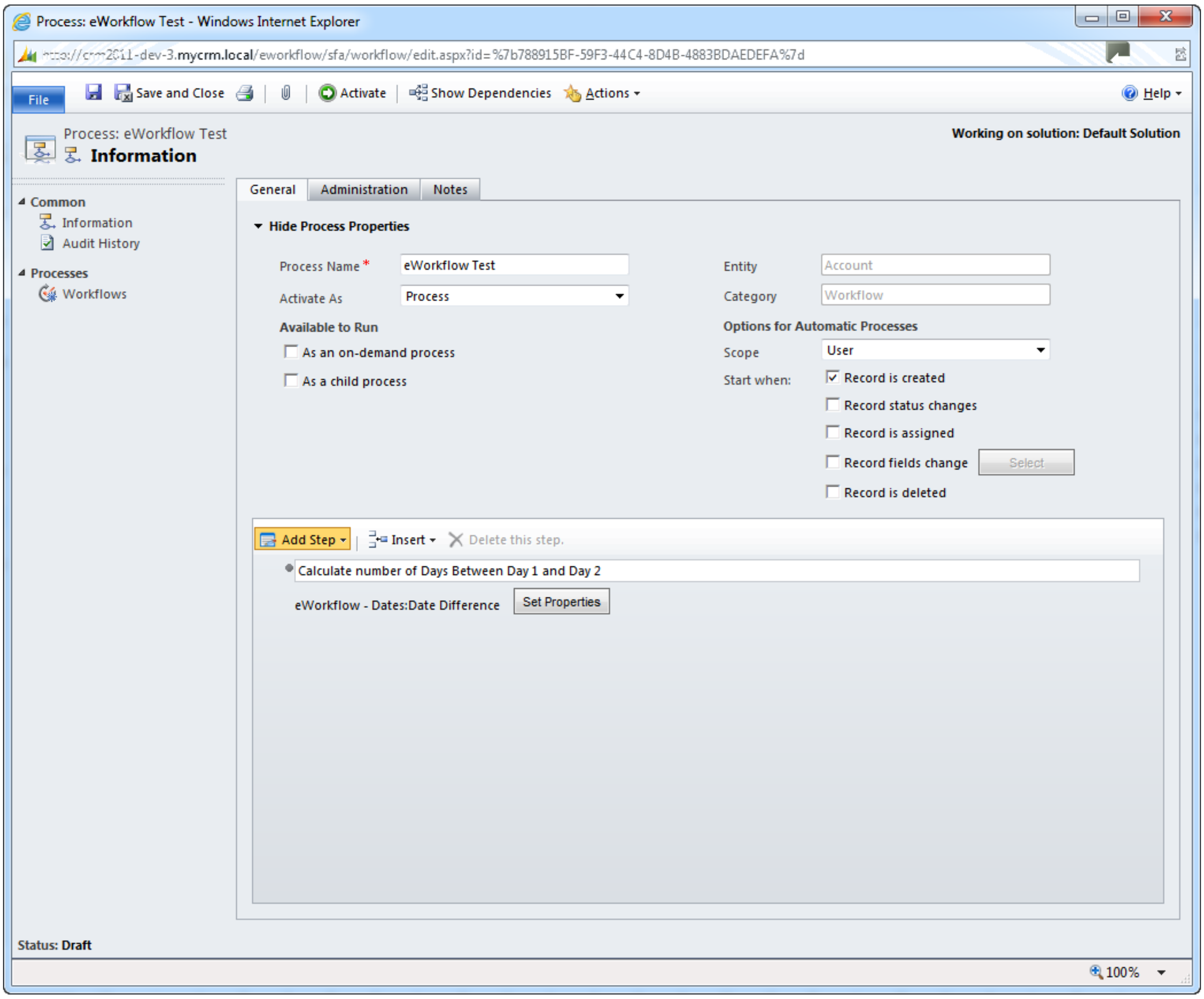
Function – DateDifferenceBusinessDay

Similar to the DateDifference function but this calculation will only return the number of business days left between 2 dates

This is a create function for running in SLA style Workflows that will update a record if a case or incident has not been matched.

Function Call :- Input
Date 1 (Date)
Date 2 (Date)

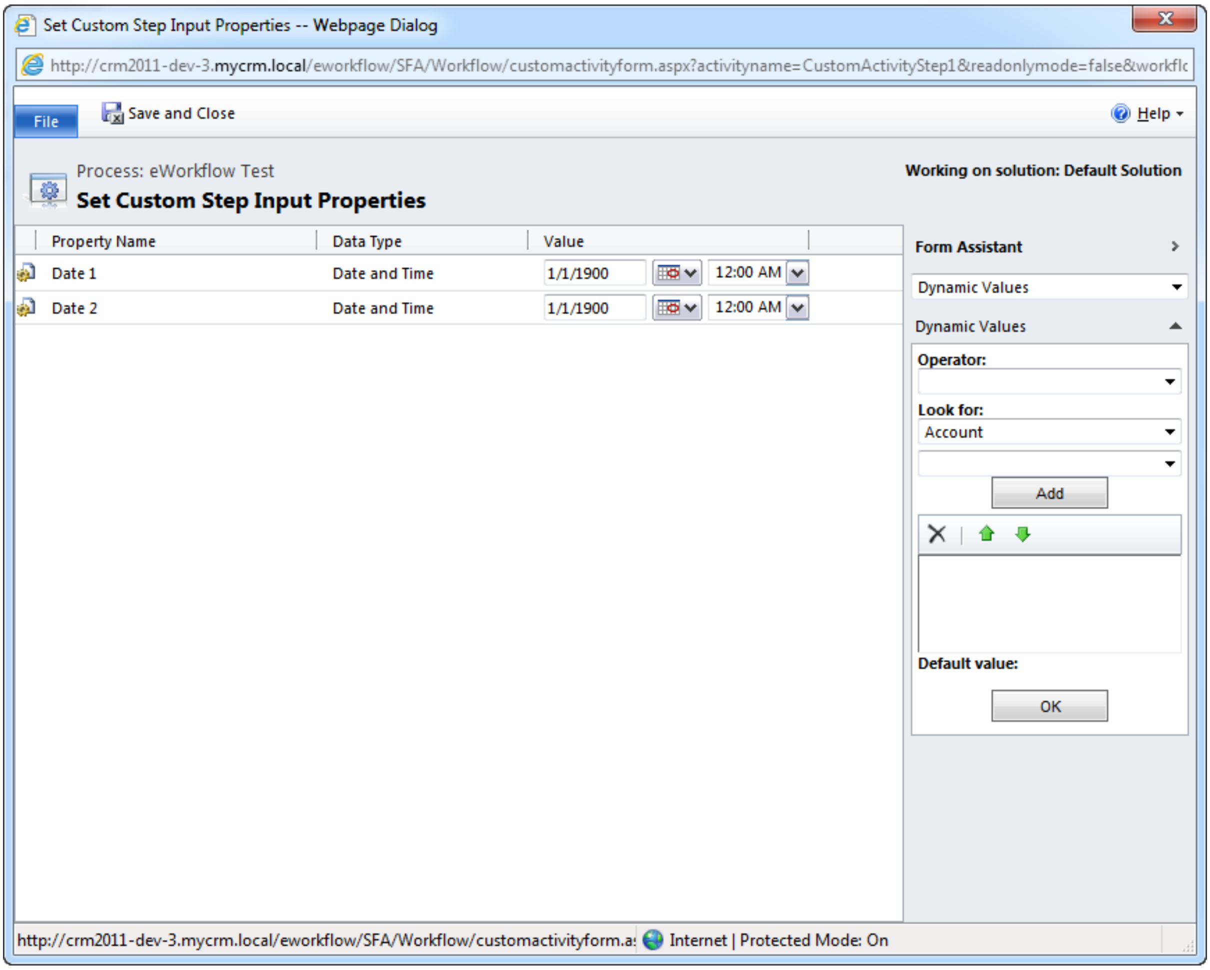
Example 14.1



Function Call :- Output
Days (Whole Number)
Hours (Whole Number)
Minutes (Whole Number)
Total Days (Whole Number)
Total Hours (Whole Number)
Total Minutes (Whole Number)

As before with Date Difference you will need to set the parameters on the setting screen, which can either be fixed dates or data fields (Data Slugs) from CRM.

Example 14.2

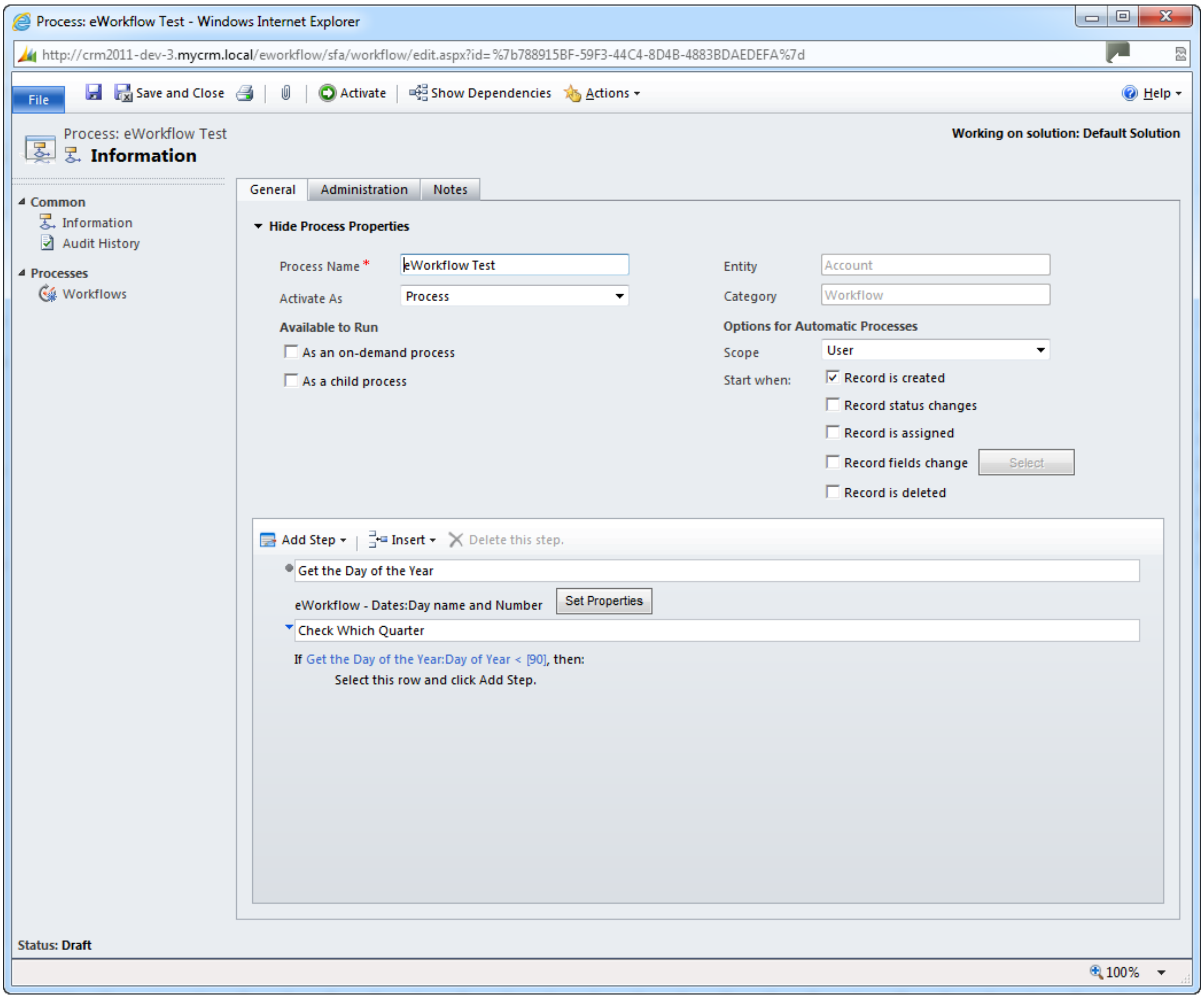

Set Custom Step Input Properties -- Webpage Dialog
http://crm2011-dev-3.mycrm.local/eworkflow/SFA/Workflow/customactivityform.aspx?activityname=CustomActivityStep1&readonlymode=false&workflc
File
Save and Close
Help
Process: eWorkflow Test
Set Custom Step Input Properties
Working on solution: Default Solution
Property Name
Data Type
Value
Date 1
Date and Time
1/1/1900
12:00 AM
Date 2
Date and Time
1/1/1900
12:00 AM
Form Assistant
Dynamic Values
Dynamic Values
Operator:
Look for:
Account
Add
Default value:
OK
http://crm2011-dev-3.mycrm.local/eworkflow/SFA/Workflow/customactivityform.a:
Internet | Protected Mode: On

Function – GetDayNameAndNumber

A great workflow function that can be used to get a Day name from a date that is supplied from the settings; this can also use data fields from CRM.

Function Call :- Input
Date 1 (CRM date field or fixed date field from picker)

Example 15.1



Function Call :- Output
Day of the Week (number)

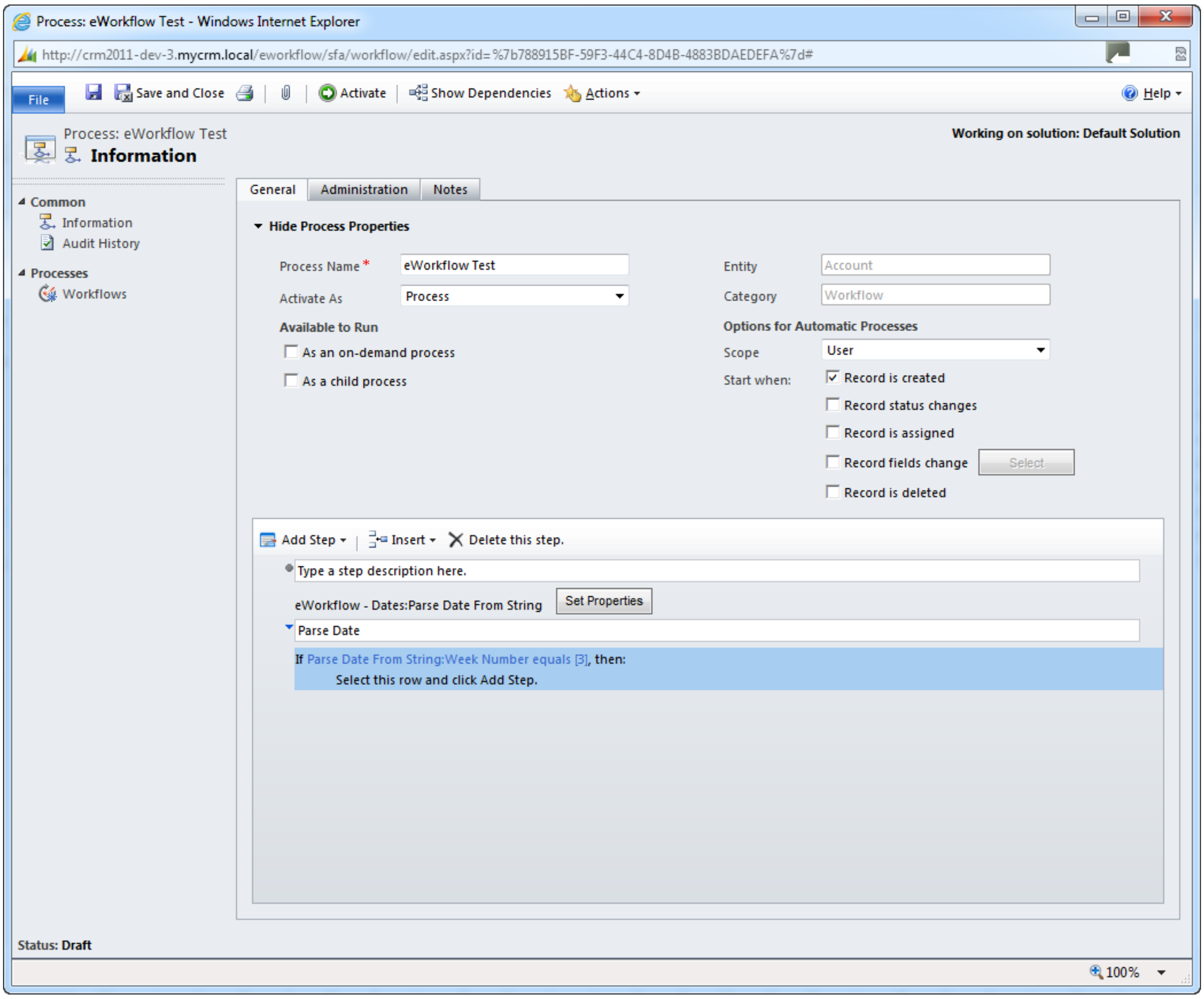
Day of the Year (number)
Name of the Day (Sunday – Saturday)

Function – PareseDateFromString

An extended Workflow function that will parse different parts of a date from a string field held in CRM, or from a date field that is fixed or is a data field.

Function Call :- Input
Date 1 (CRM date field or fixed date field from picker)

Example 16.1



A number of fields are output which can then be used for further validation

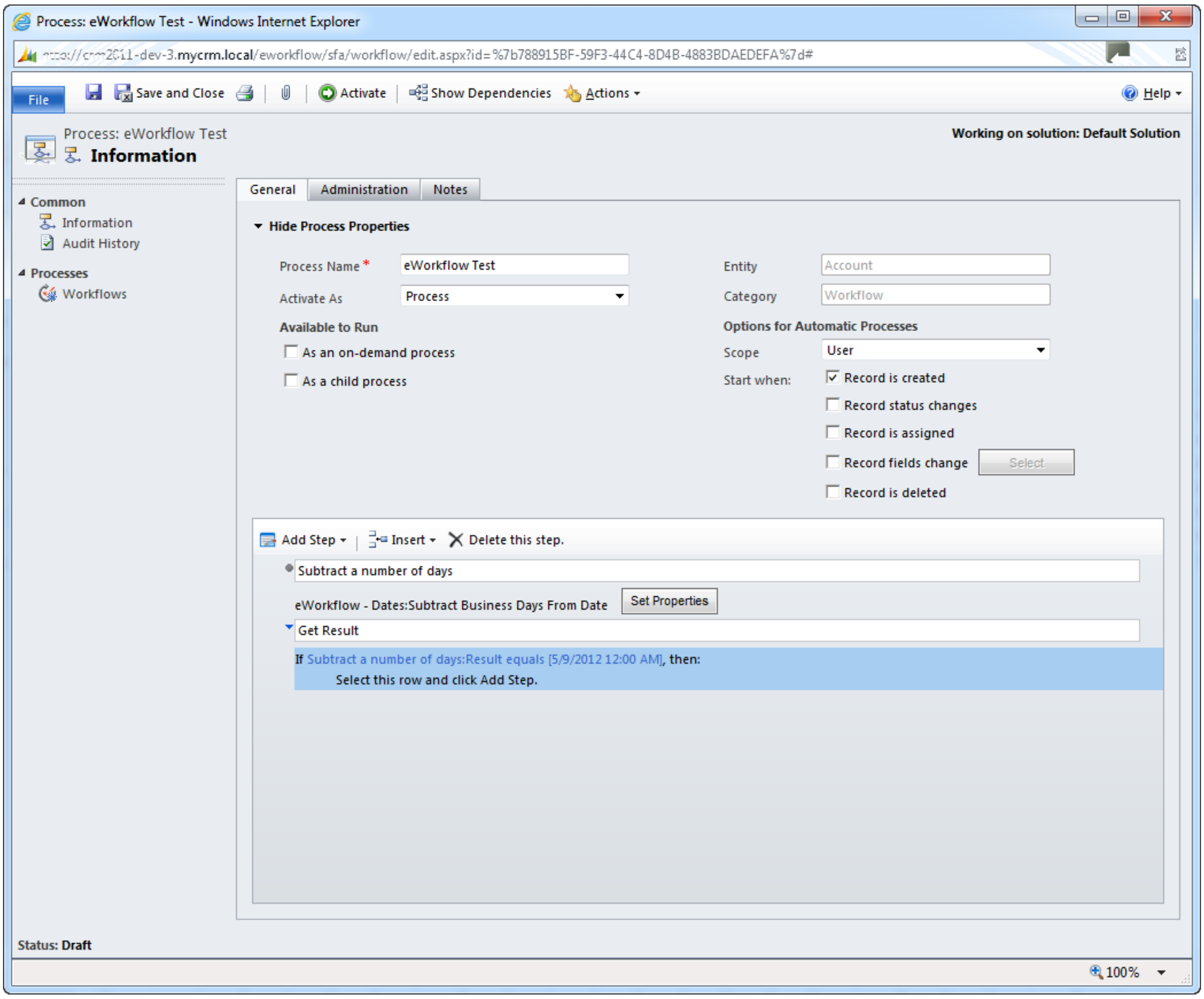
Function Call :- Output
Day of Week (Number)
Day of Week (Text)
Day of Year
Week Number
Year
Month
Day
Hour (12 hour clock)
Hour (24 hour clock)
Minuet
AM
PM

Function – SubtractBusinessDaysFromDate

Similar to the above function that enables the adding of a number of Business Days, you can use this function to subtract days from a given date, not business days are classed as Monday to Friday.

Function Call :- Input
Date 1 (CRM date field or fixed date field from picker)
Check to see if Date is Business Day
Days To Subtract
Hours to Subtract
Minutes to Subtract

Example 17.1



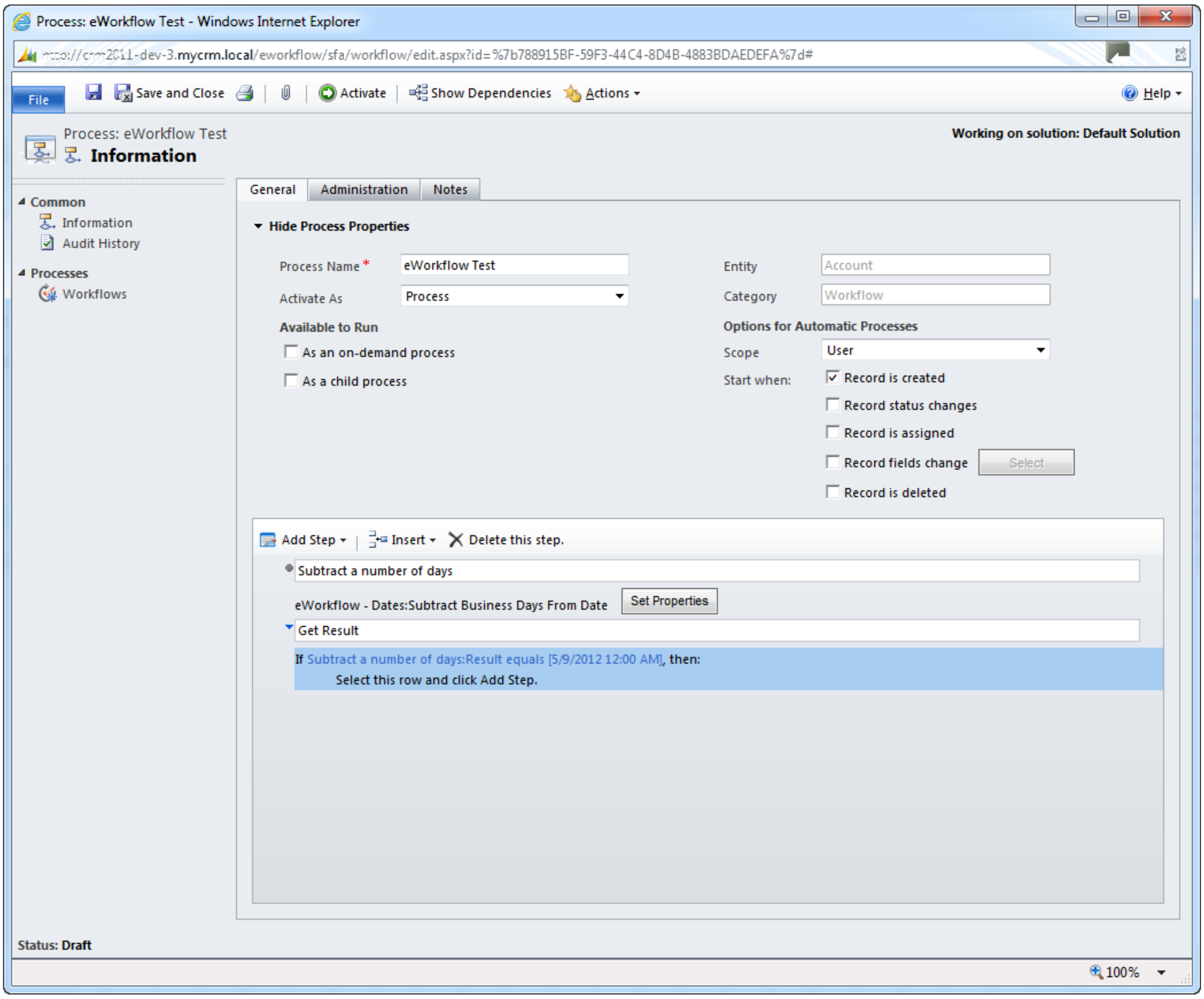
Function Call :- Output
Result (CRM date)

Function – SubtractDaysFromDate

A similar function to extracting business days but this function includes all week days, additional input parameters also exist.

Function Call :- Input
Date 1 (CRM date field or fixed date field from picker)
Years to Subtract
Months To Subtract
Weeks to Subtract
Days To Subtract
Hours to Subtract
Minutes to Subtract

Example 18.1



Function Call :- Output
Result (CRM date)

MyWorkflow – RegEx

Another set of useful tools and function calls to be included in the workflow Library is that for handling Regular Expressions.

These function calls enable an end user to complete a number of predefined functions

Function – RegexMatch

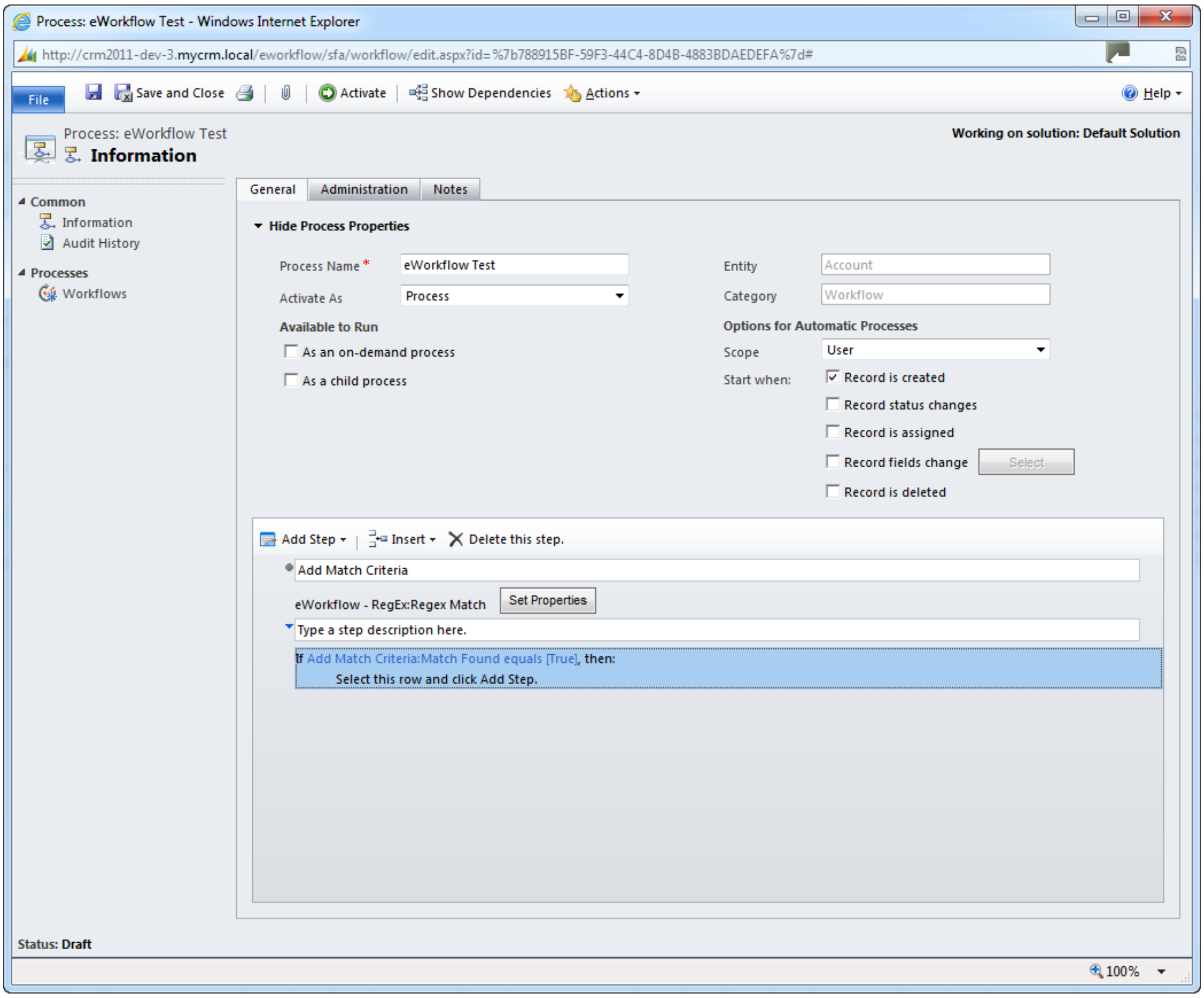
With this function call a workflow can be used to Match text in a body or field of data, regular expressions can be complex but are very powerful when usines in combination with workflow and CRM data Fields

The link below can be used to see example of how to use Regular Expressions against Data

http://www.regular-expressions.info/examples.html

Function Call :- Input
Text (String)
Regular Expression (String)

Example 19.1



Function Call :- Output
Match (True / False)

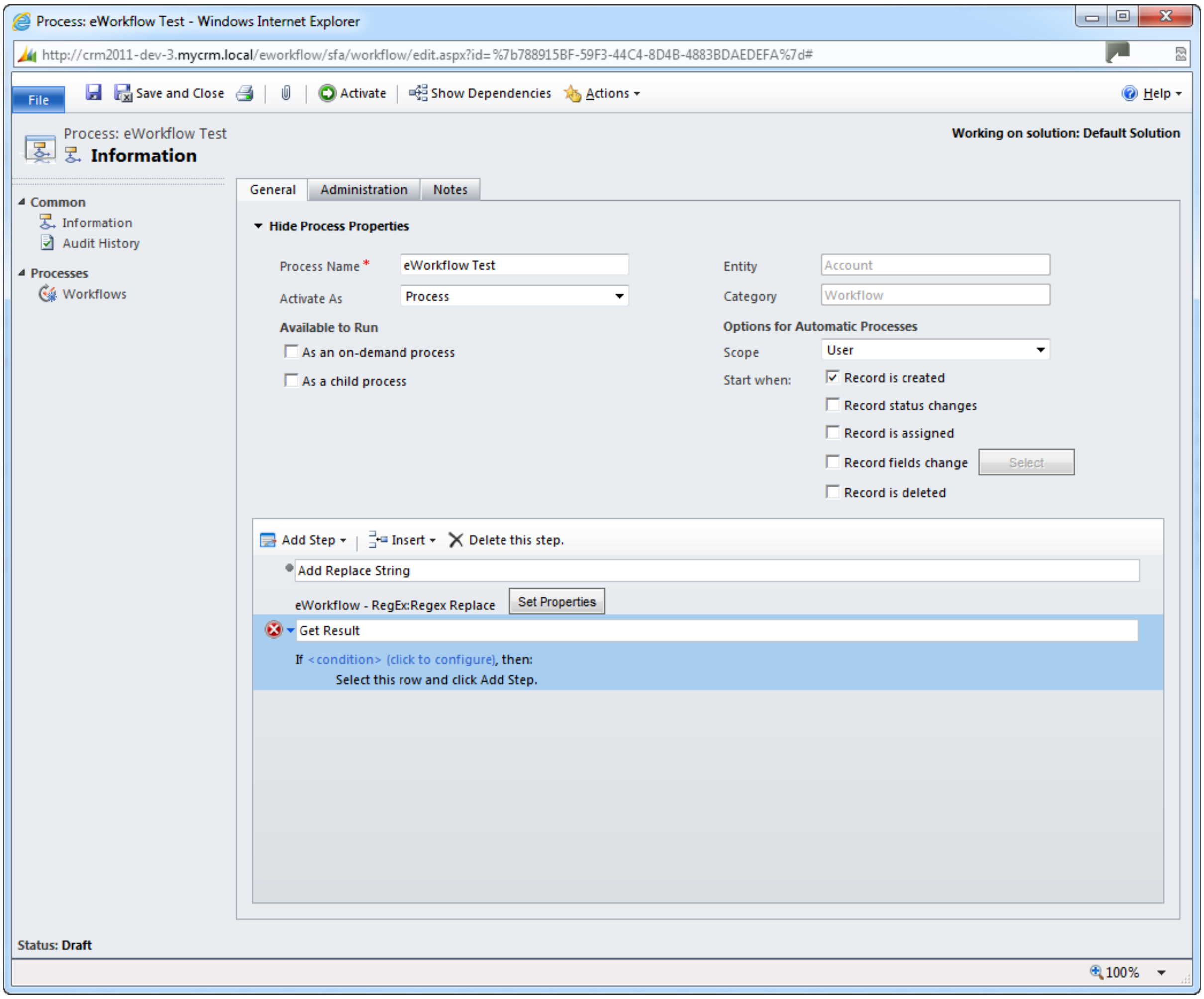
Invalid Regular Expression

Function – RegexRelpace

Another great use of the regex functionality is having the ability to replace stings in a block of text or a data field, which can then be used for update of a record type.

Function Call :- Input
Text (String)
Replacement (String)
Regular Expression (String)

Example 20.1



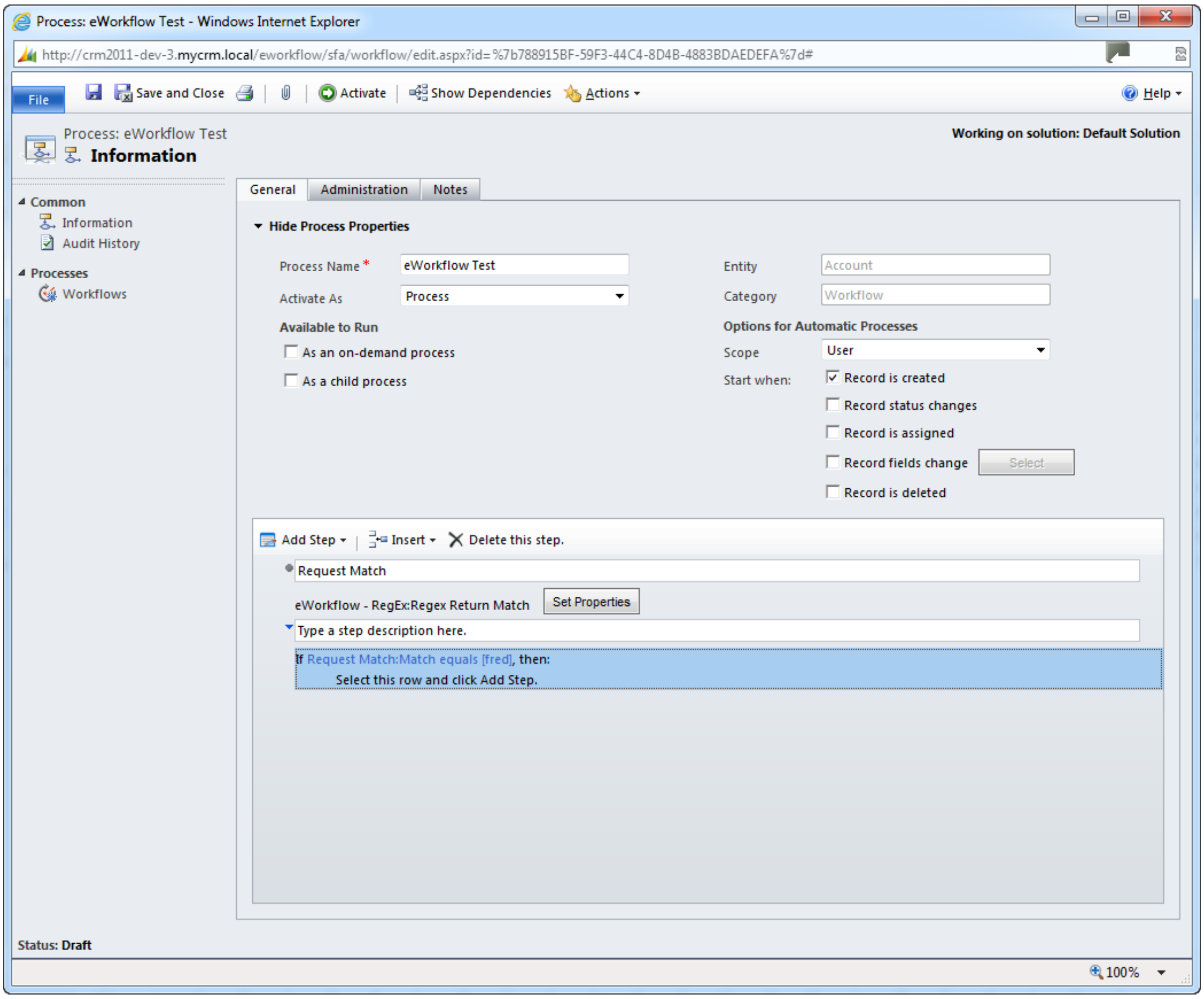
Function Call :- Output
Result (String)
Invalid Regular Expression

Function – RegexReturnMatch

Similar to the match function but this workflow call will return the match it has found

Function Call :- Input
Match Index (Whole Number)
Text (String)
Regular Expression (String)

Example 21.1



Function Call :- Output
Match Found (True / False)
Match (String)
Invalid Regular Expression

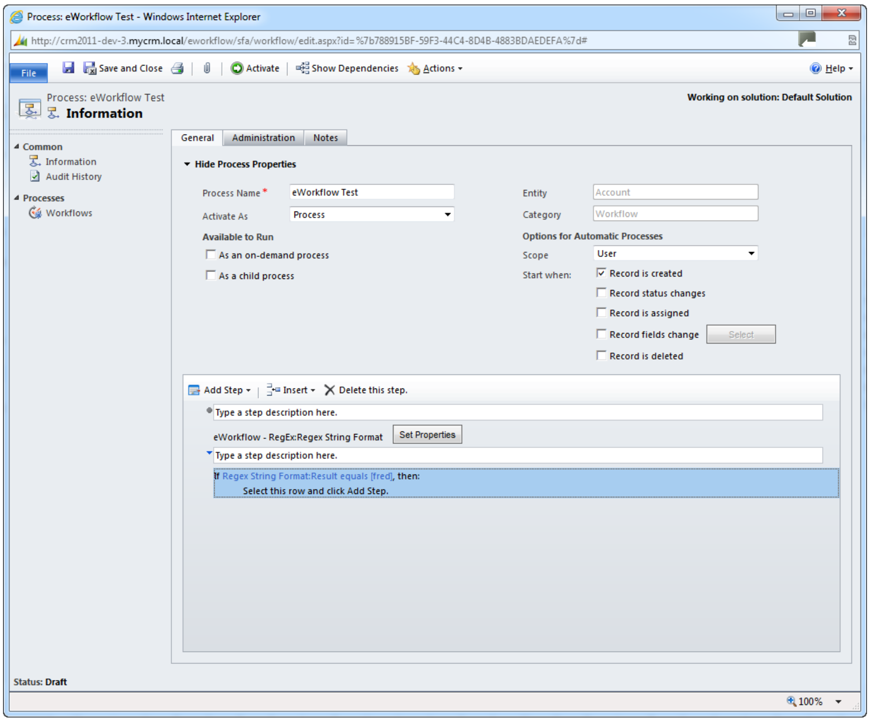
Function – RegexStringFormat

Similar to the match function but this workflow call will return the match that was found

Function Call :- Input

Format (String)
Text (String)
Regular Expression (String)

Example 22.1



Function Call :- Output
Match Found (True / False)
Result (String)
Invalid Regular Expression

MyWorkflow – Strings

This function set for Microsoft CRM workflow enables data strings in text and notes fields to be manipulated and updated based on workflow conditions.

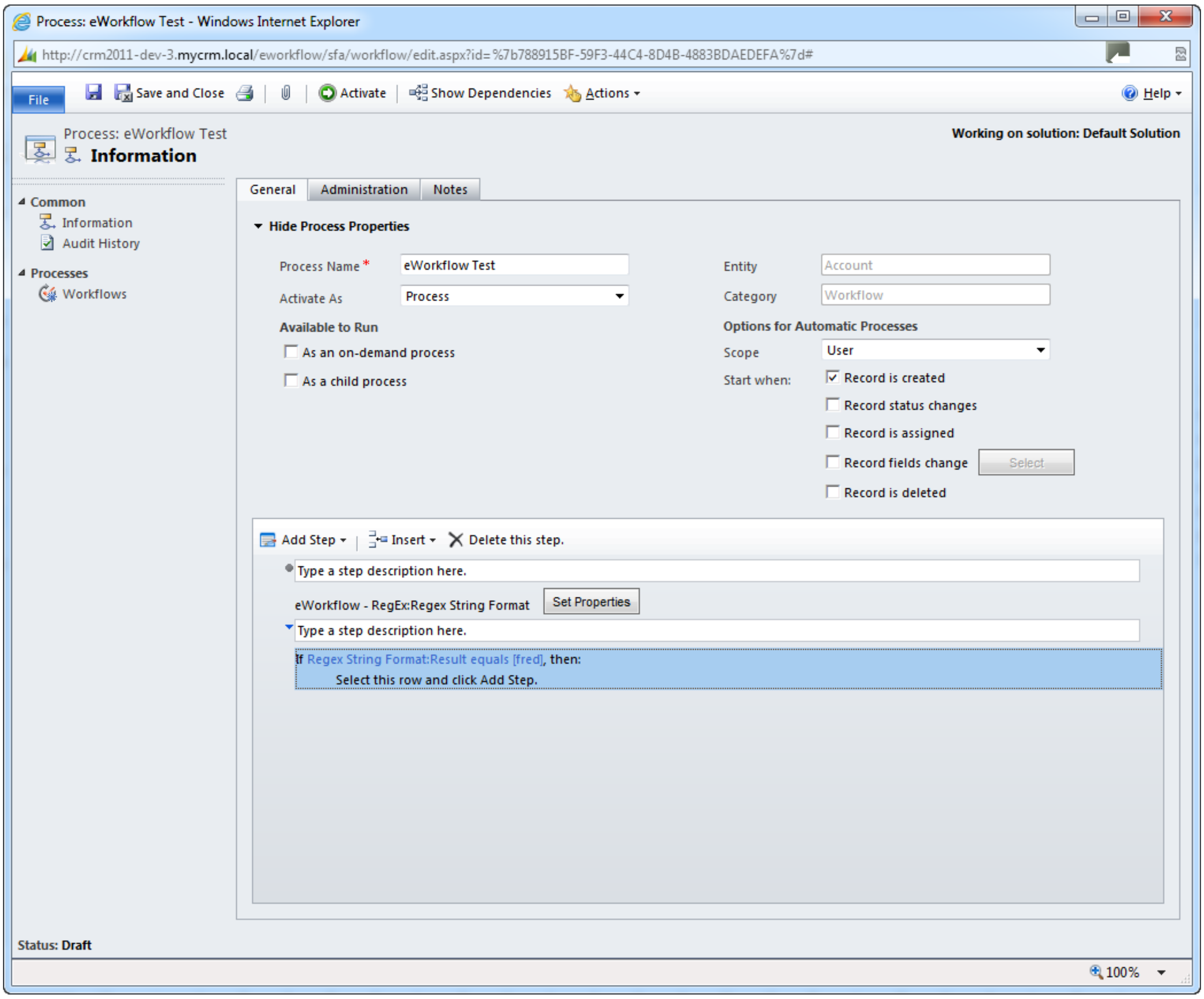
Included are a number of standard string manipulations functions.

Function – CapitiliseString

Similar to the match function but this workflow call will return the match that was found

Function Call :- Input
Text (String)
Capitalize all Words (True / False)

Example 23.1



Function Call :- Output
Result (String)

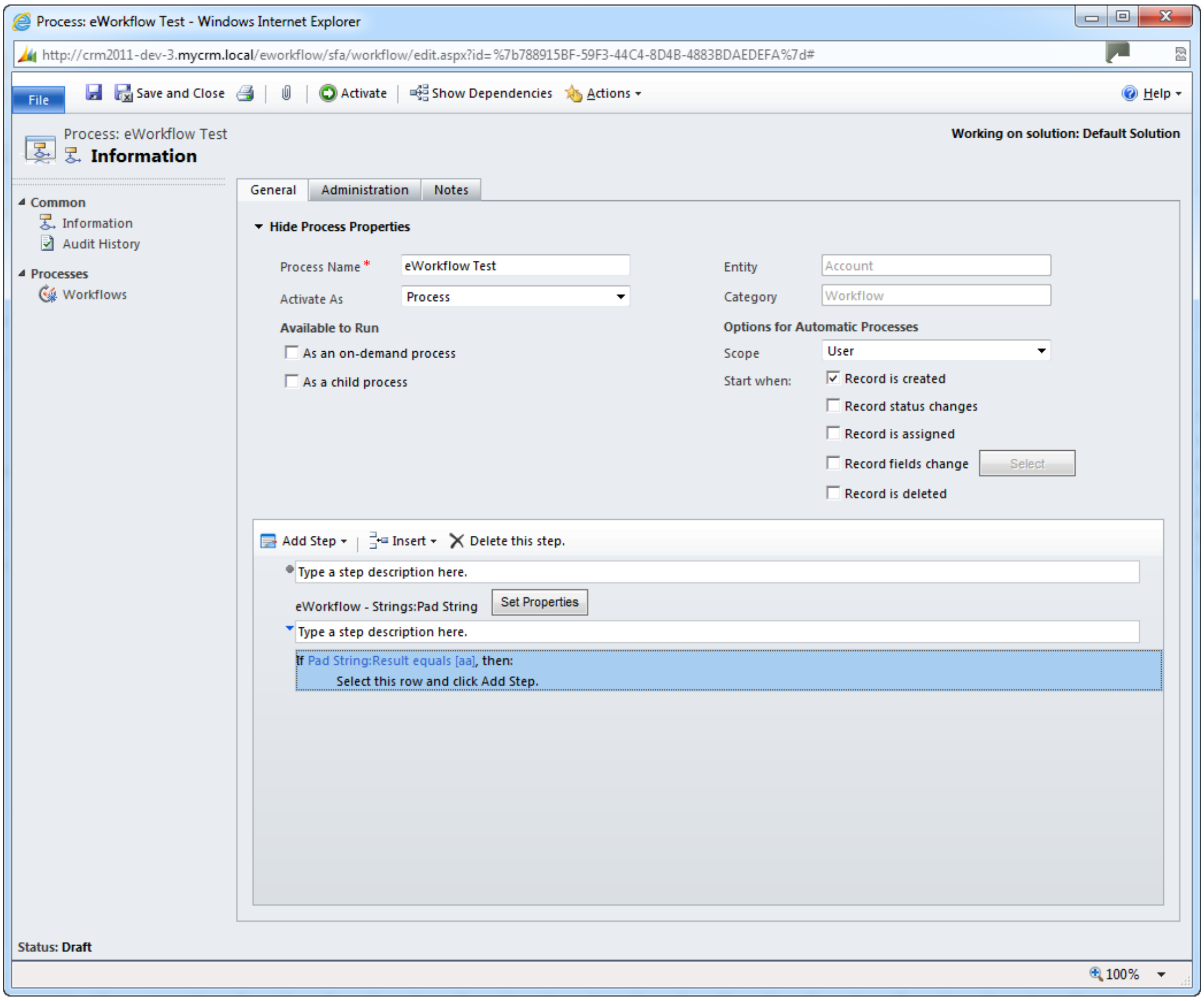
Function – PadString

This great function allows you to pad out data stings held in the CRM data fields

Function Call :- Input
Text (String)
Pad Character (String)
Pad to Left (True / False)

Final Length (Whole Number)

Example 24.1



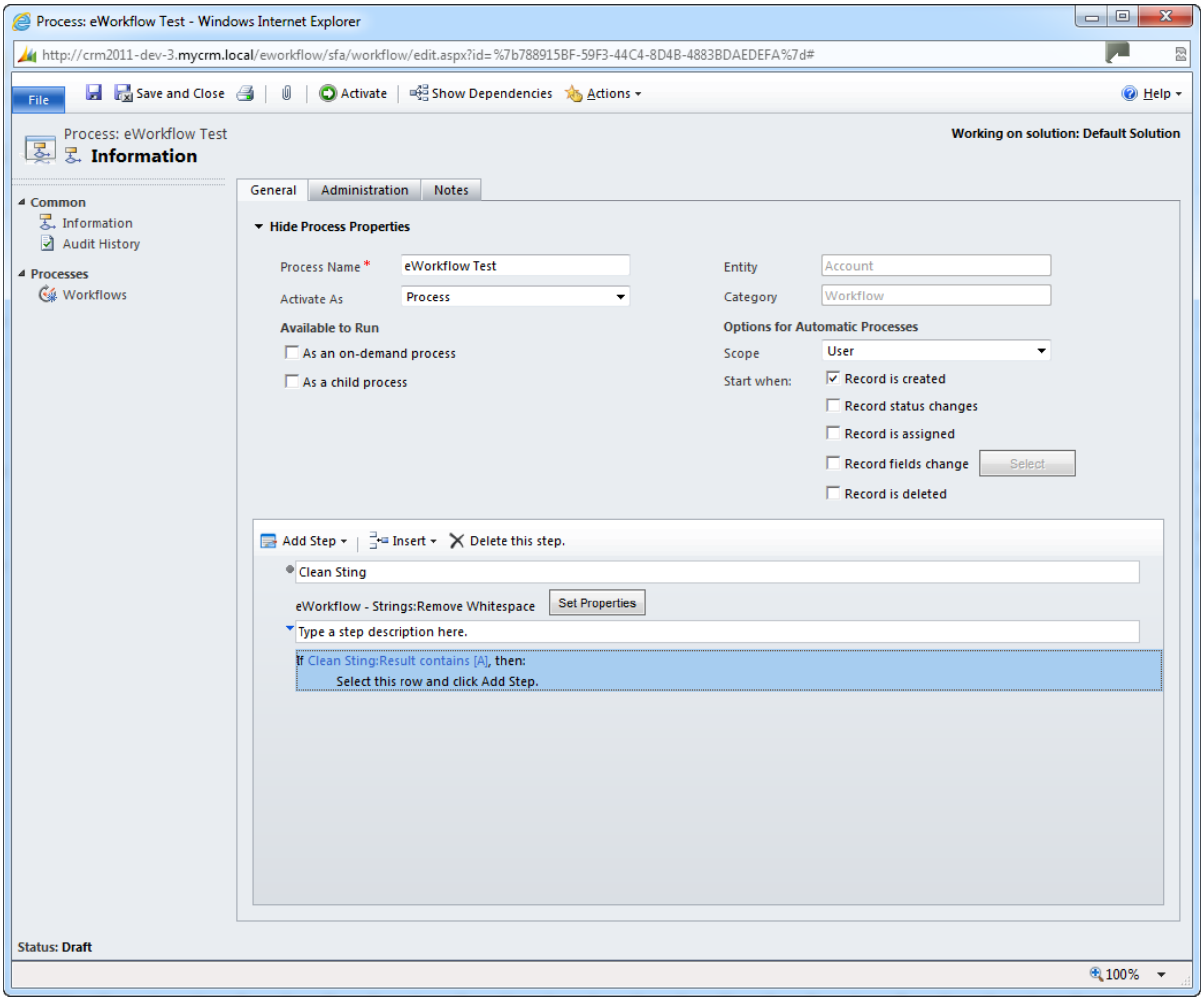
Function Call :- Output
Result (String)

Function – RemoveWhitespace.

This great function allows the clean-up of data fields and string in the CRM database

Function Call :- Input
Text (String)

Example 25.1



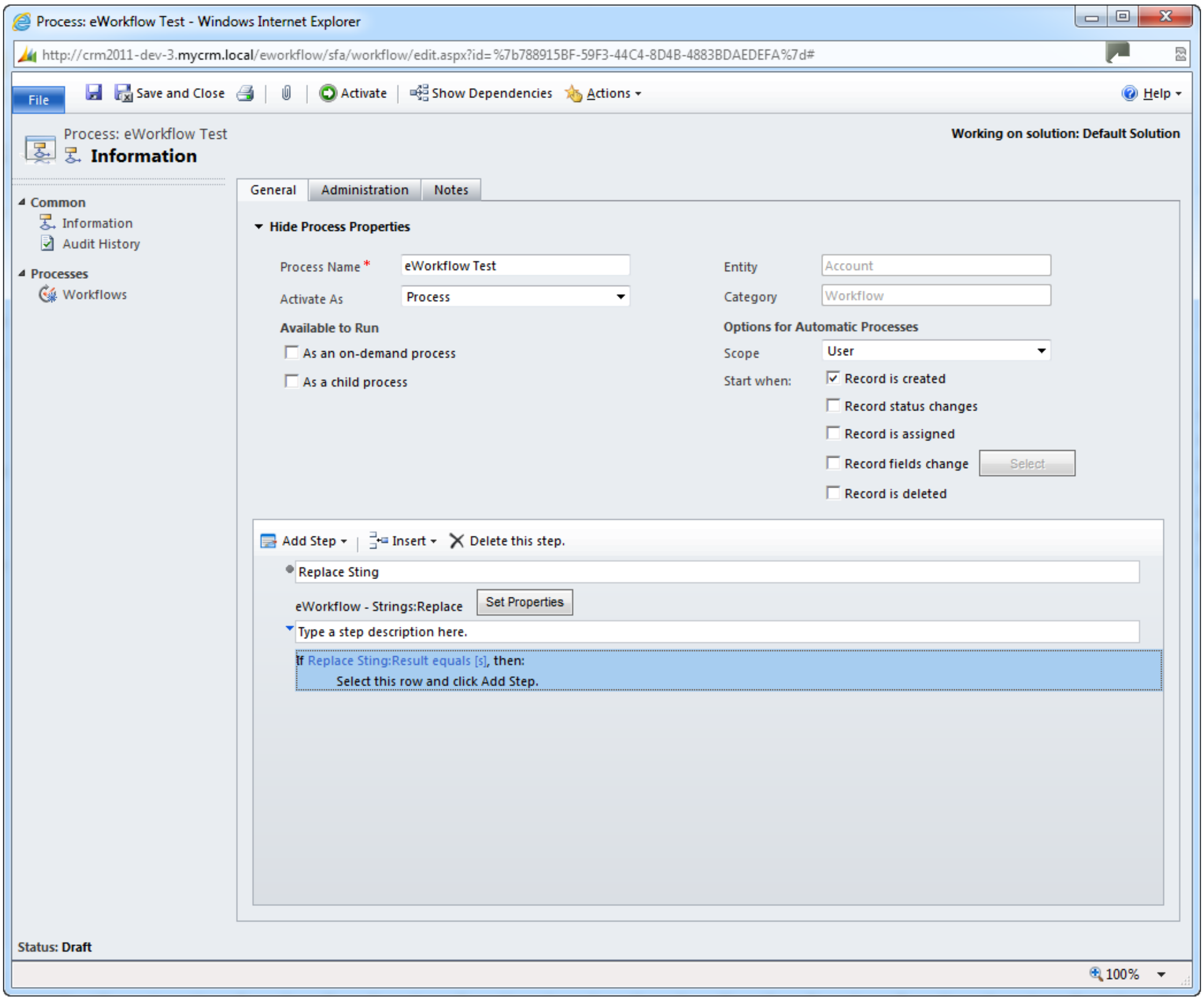
Function Call :- Output
Result (String)

Function – ReplaceString.

This great function gives the ability to an end user or workflow designer to change string values and replace strings within a body of text in the CRM database

Function Call :- Input
Text (String)
Old Value (String)
New Value (String)
Case Sensitive (True / False)

Example 26.1



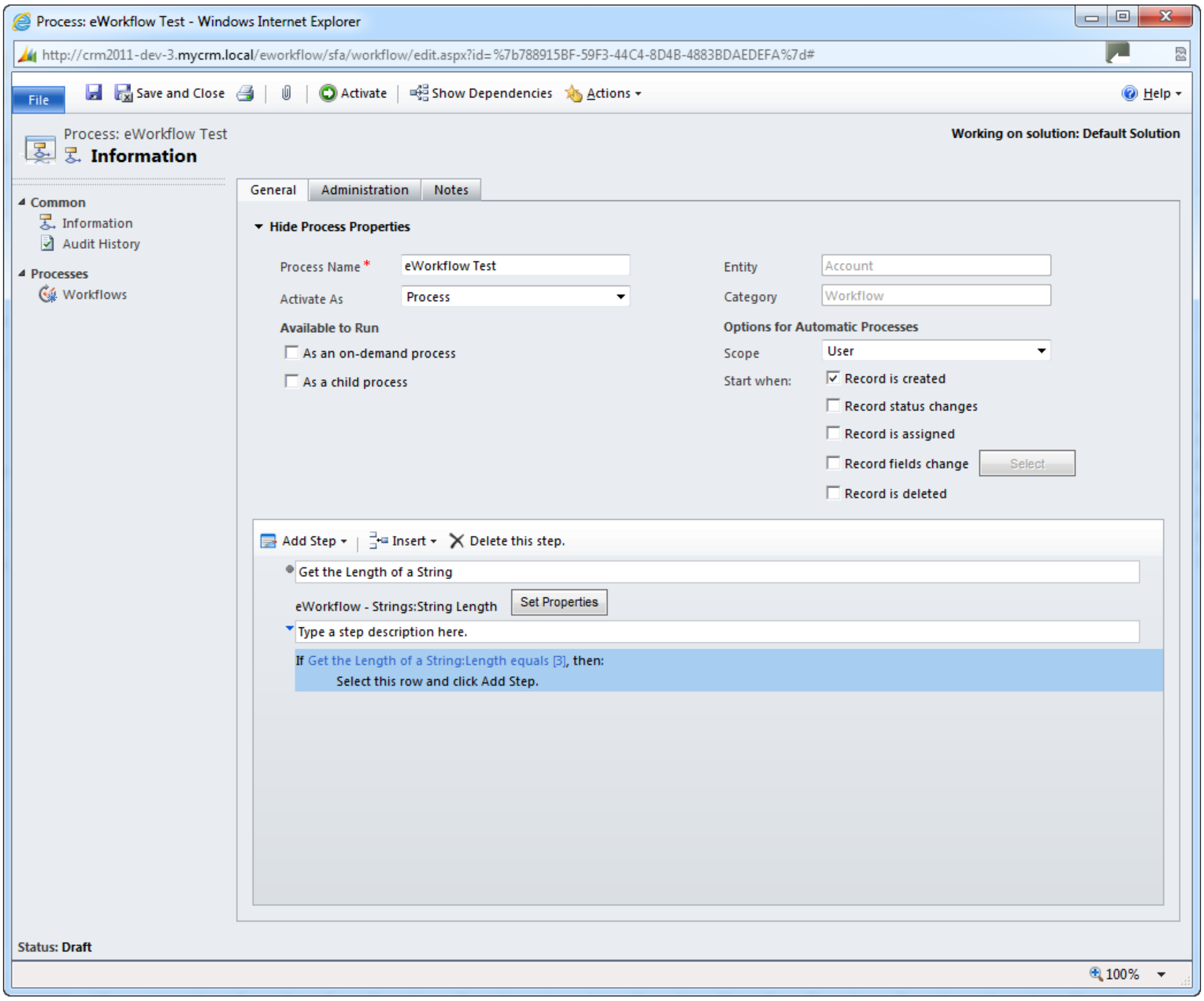
Function Call :- Output
Result (String)

Function –StringLength.

Now in the workflow sting lengths can be tested to make sure a sting is of the right length

Function Call :- Input
Text (String)

Example 27.1



Function Call :- Output

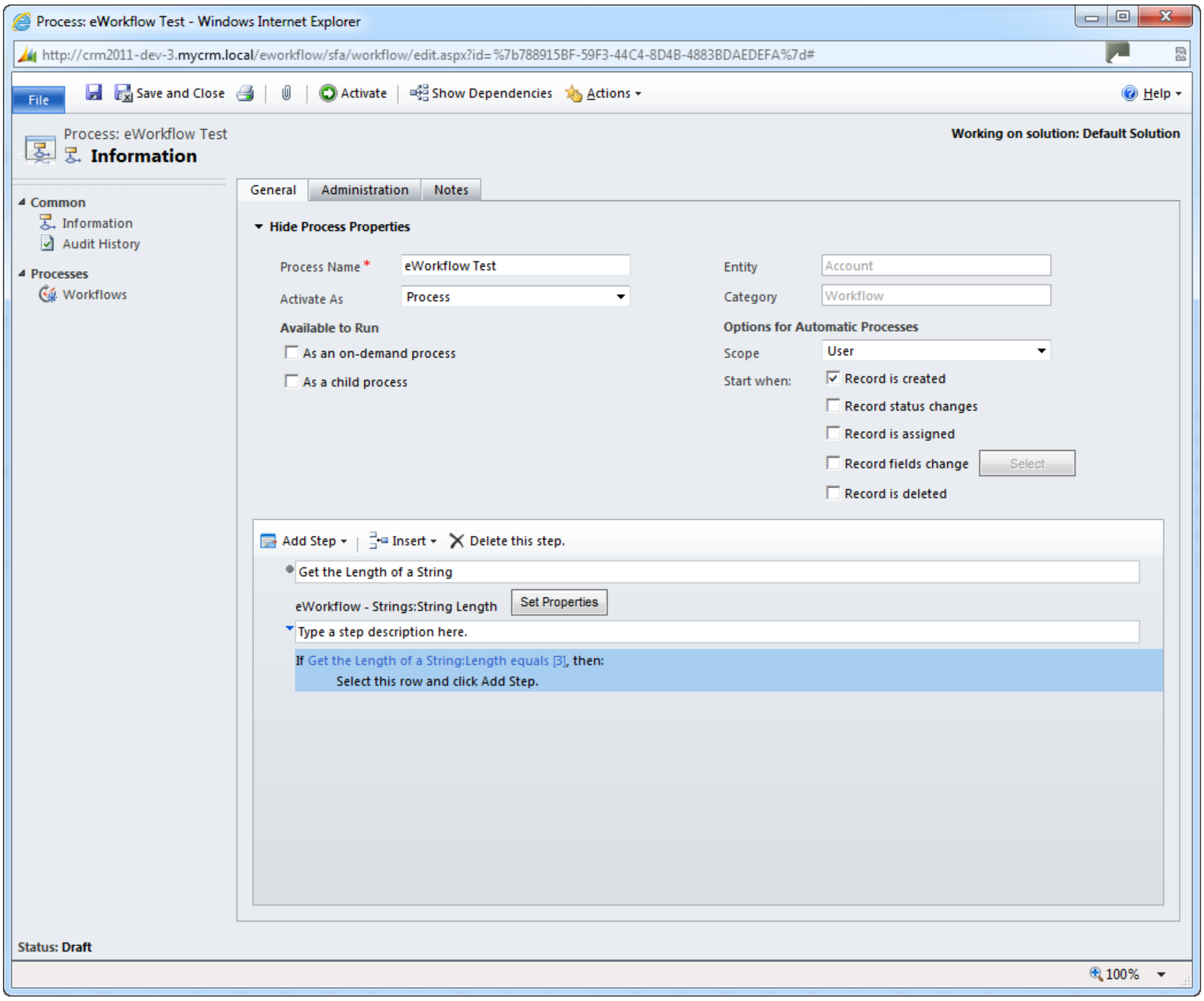
Length (Whole Number)

Function –SubString.

This great sub string check will identify if a block of text of certain keywords existing in a text field, which is great for processes requests based on formatted incoming emails

Function Call :- Input
Text (String)
From Left To Right (True / False)
Start Index Point
Length

Example 28.1



Function Call :- Output
Result (String)

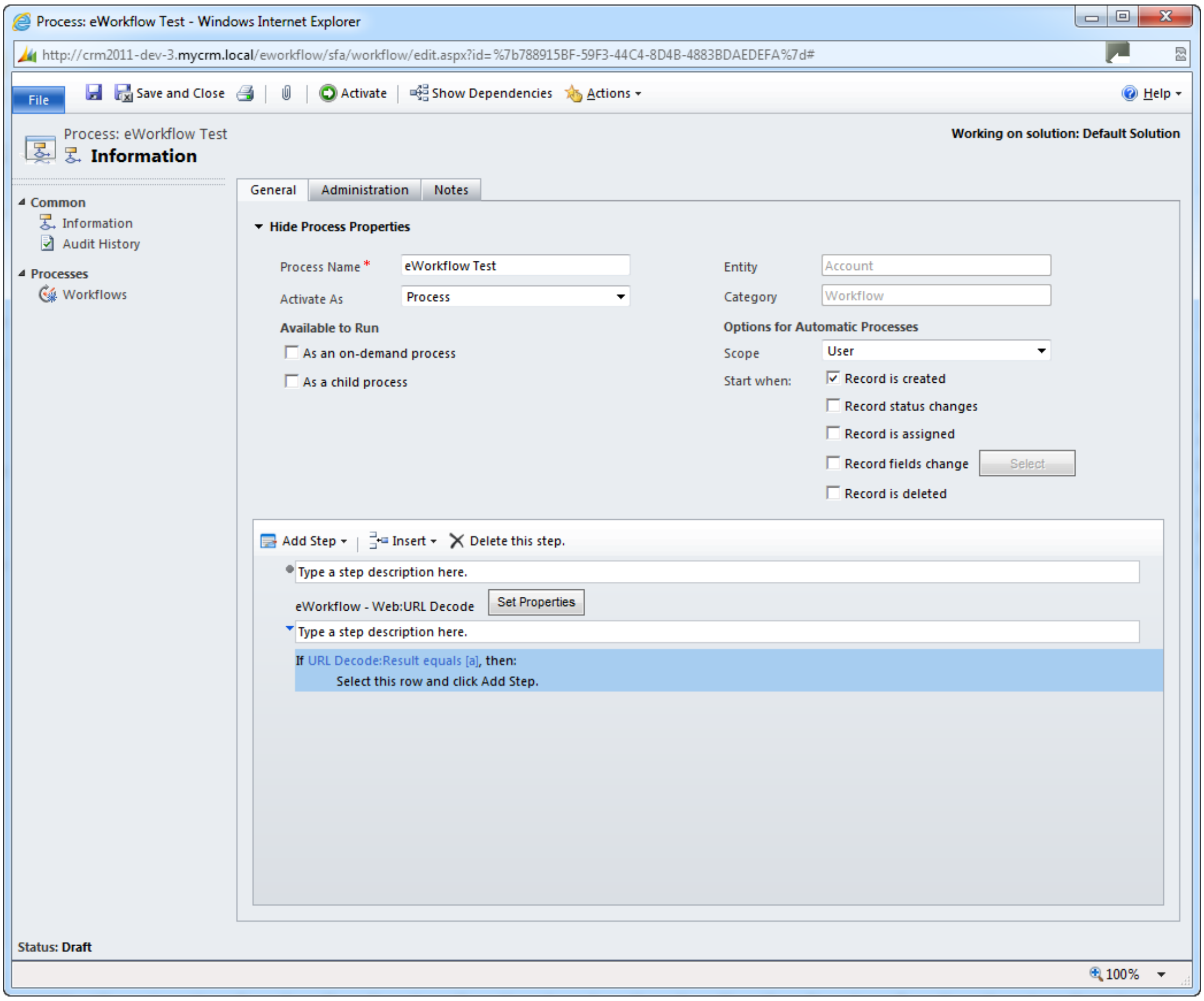
MyWorkflow – Web

Additional two functions for URL encoding have been included as part of the MyWorkflow Library

Function –WebURLDecode.

Function Call :- Input
Text (String)

Example 29.1

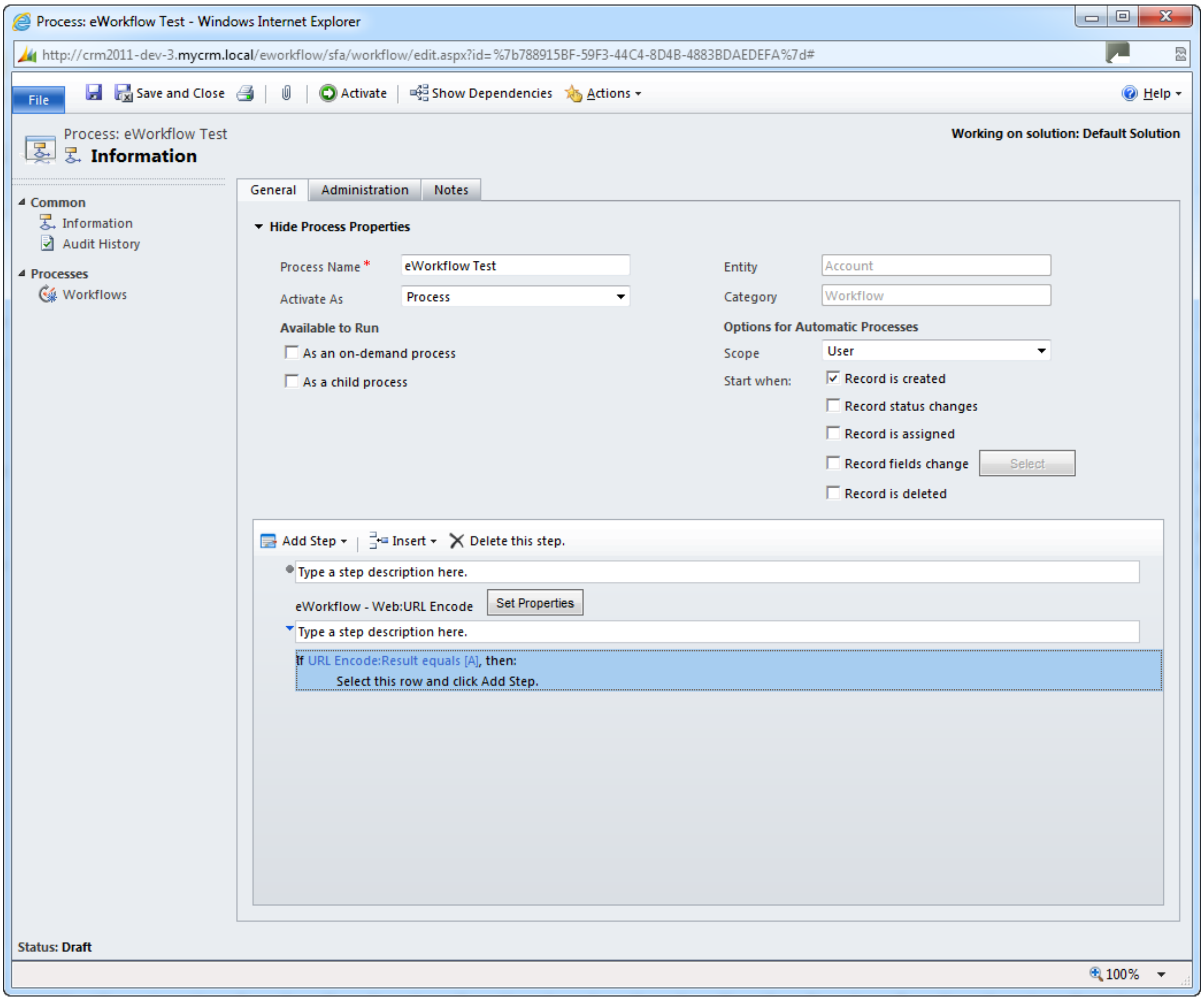


Function Call :- Output
Result (String)

Function –WebURLEncode.

Function Call :- Input
Text (String)

Example 30.1



Function Call :- Output
Result (String)

MyWorkflow – Sales

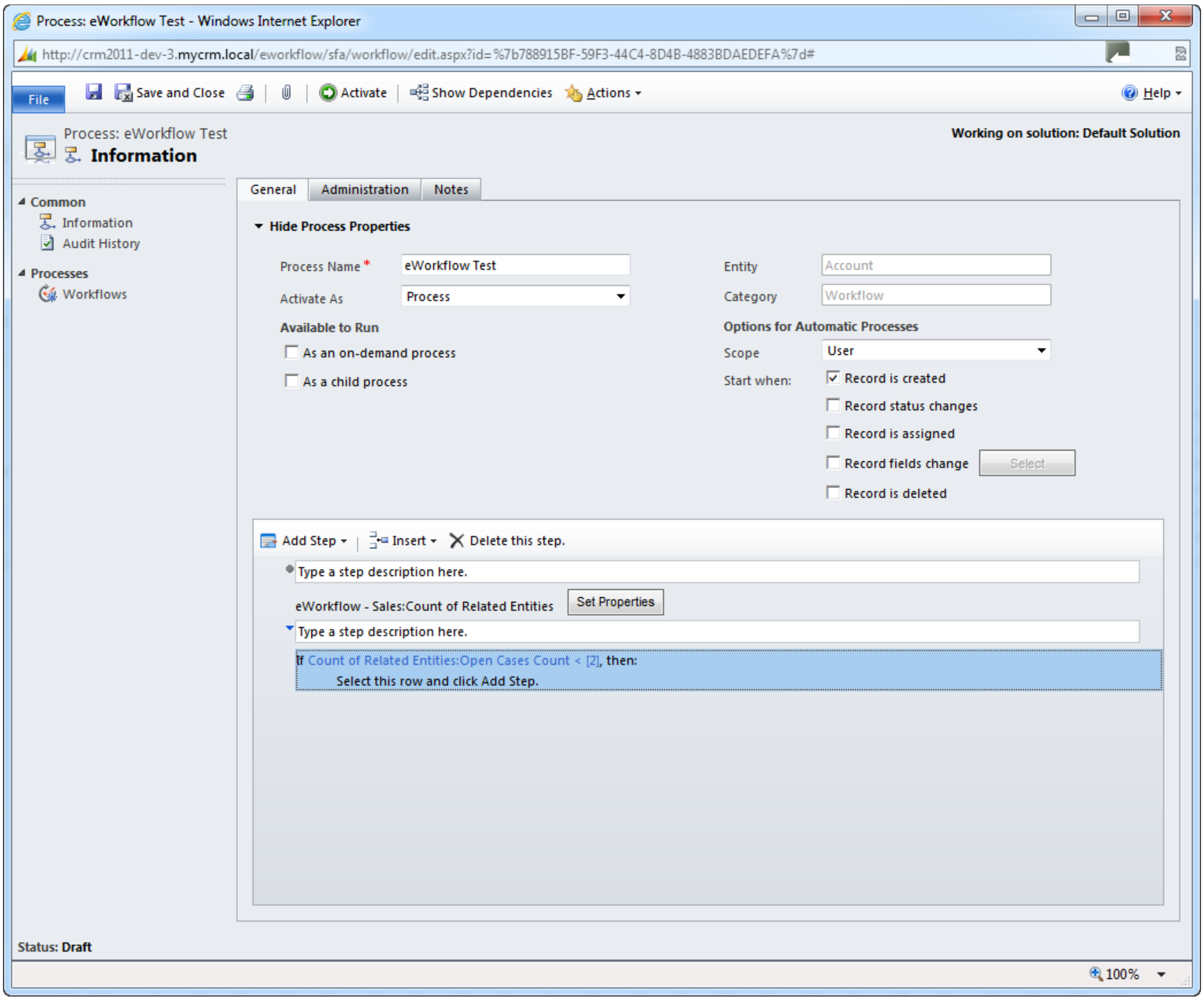
We have created a number of useful and extensible functions that may be useful within Sales and Business workflow, these functions enable counts and totals to be created to help gather analytical data

Function – CountRelatedRecords (Entities)

Our first Sales workflow enables an end user to count or set related limits around associated records, this is also a great addition if you need to build a Summary of totals for the Account or Contact.

Function Call :- Input
Account (Object)
Contact (Object)

Example 31.1



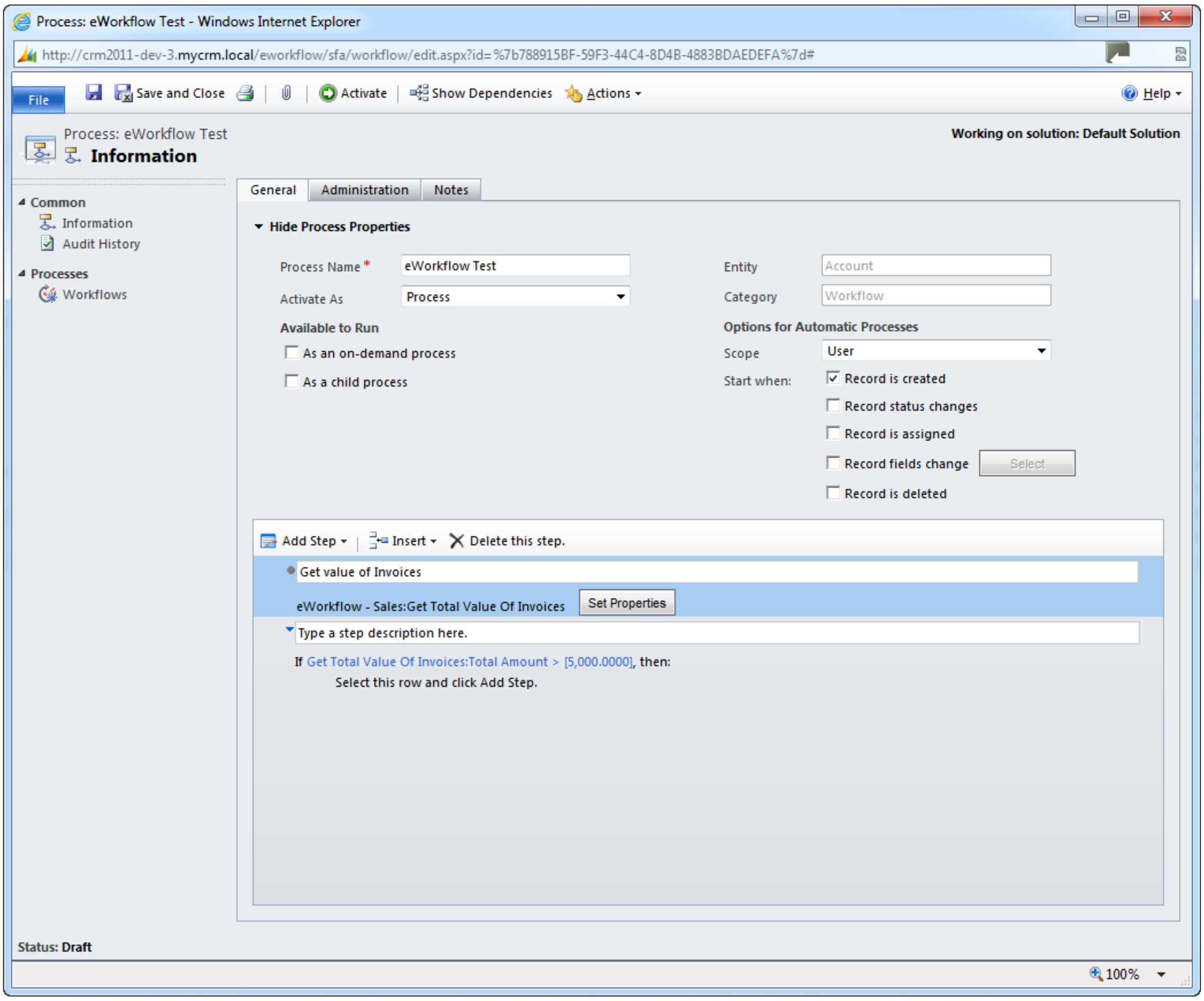
Function Call :- Output
Open Case Count (number)
Closed Case Count (number)
Opportunities Count (number)
Active Quotes Count (number)
Active Invoice Count (number)
Active Orders Count (number)
Related Contacts Count (number)

Function – TotalValueOfInvoices

With the Total Invoice value count, you can now perform workflow actions based on the total value of current invoices for a customer, in the example we test to see if an account has reached the £5000 GBP spend

Function Call :- Input
Account (Object)
Contact (Object)

Example 32.1



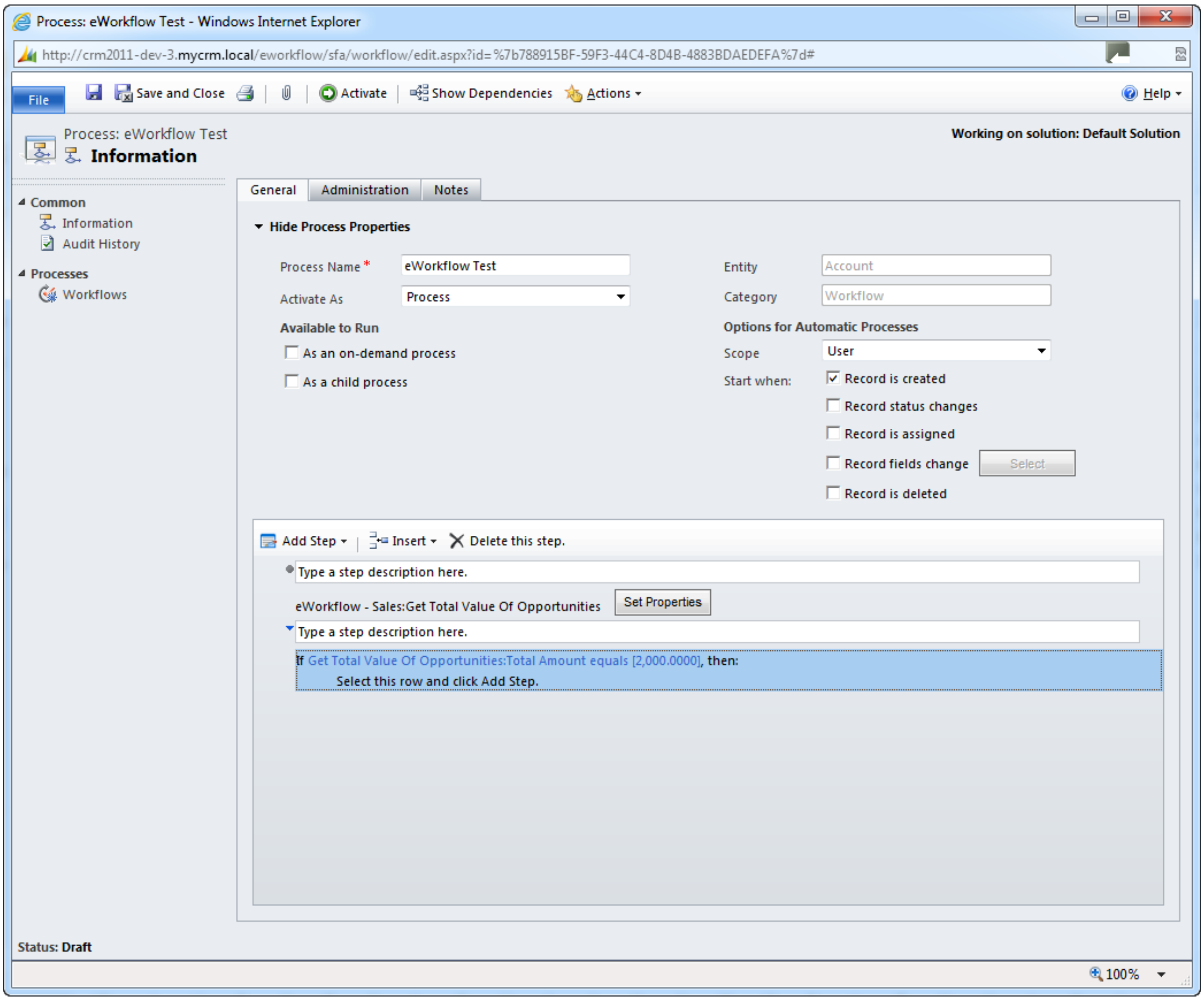
Function Call :- Output
Total Amount (Money)

Function – TotalValueOfOpportunities

With the Total Opportunity value count, you can now perform workflow actions based on the total value of current Opportunities for a customer, in the example we test to see if an account has reached the £2000 GBP Actual Value

Function Call :- Input
Account (Object)
Contact (Object)

Example 33.1



Function Call :- Output
Total Amount (Money)
Total Estimated Revenue (Money)

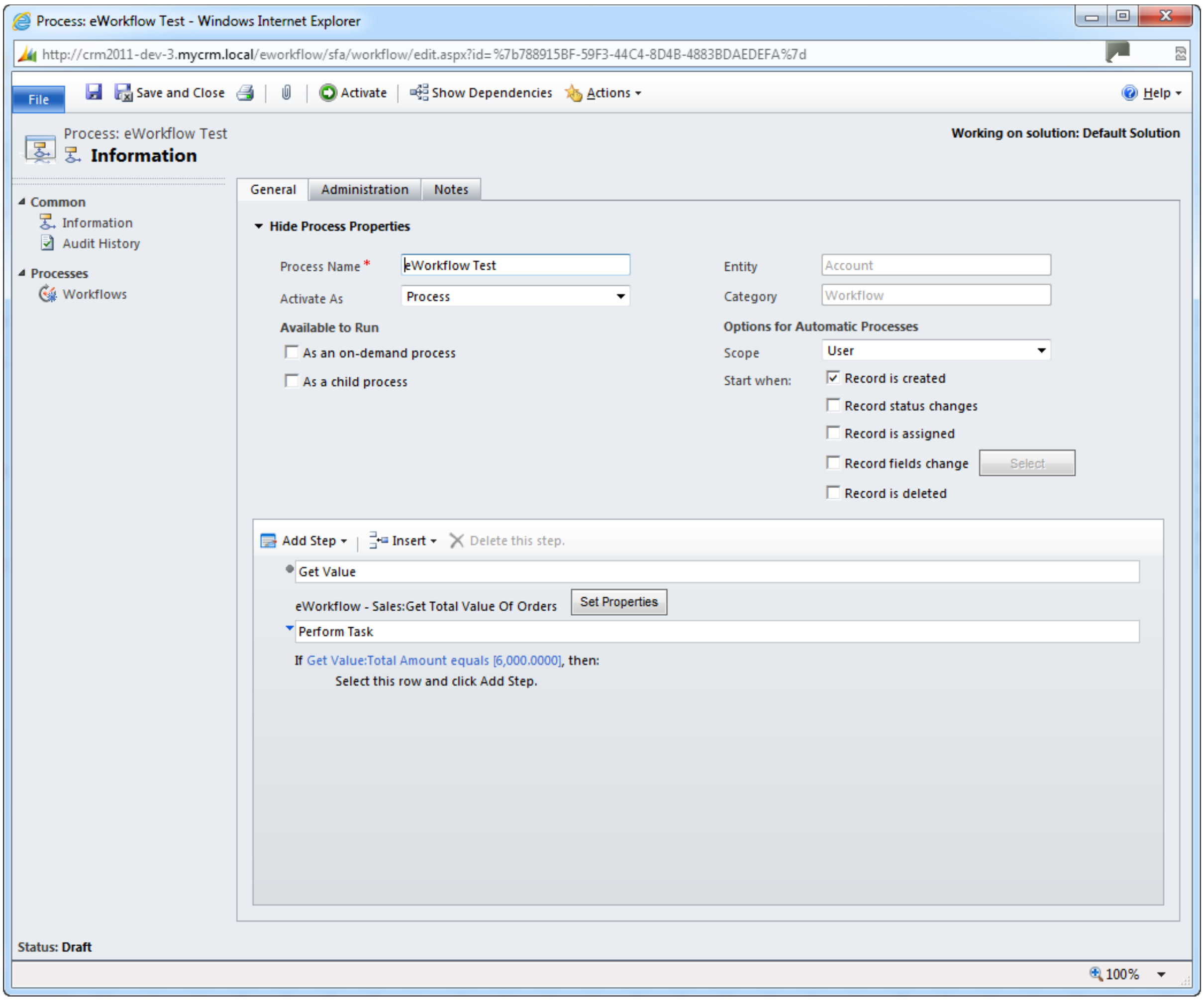
Function – TotalValueOfOrders

With the Total Order value count, you can now perform workflow actions based on the total value of current Orders for a customer, in the example we test to see if an account has reached the £6000 GBP Value

Function Call :- Input

Account (Object)
Contact (Object)

Example 34.1



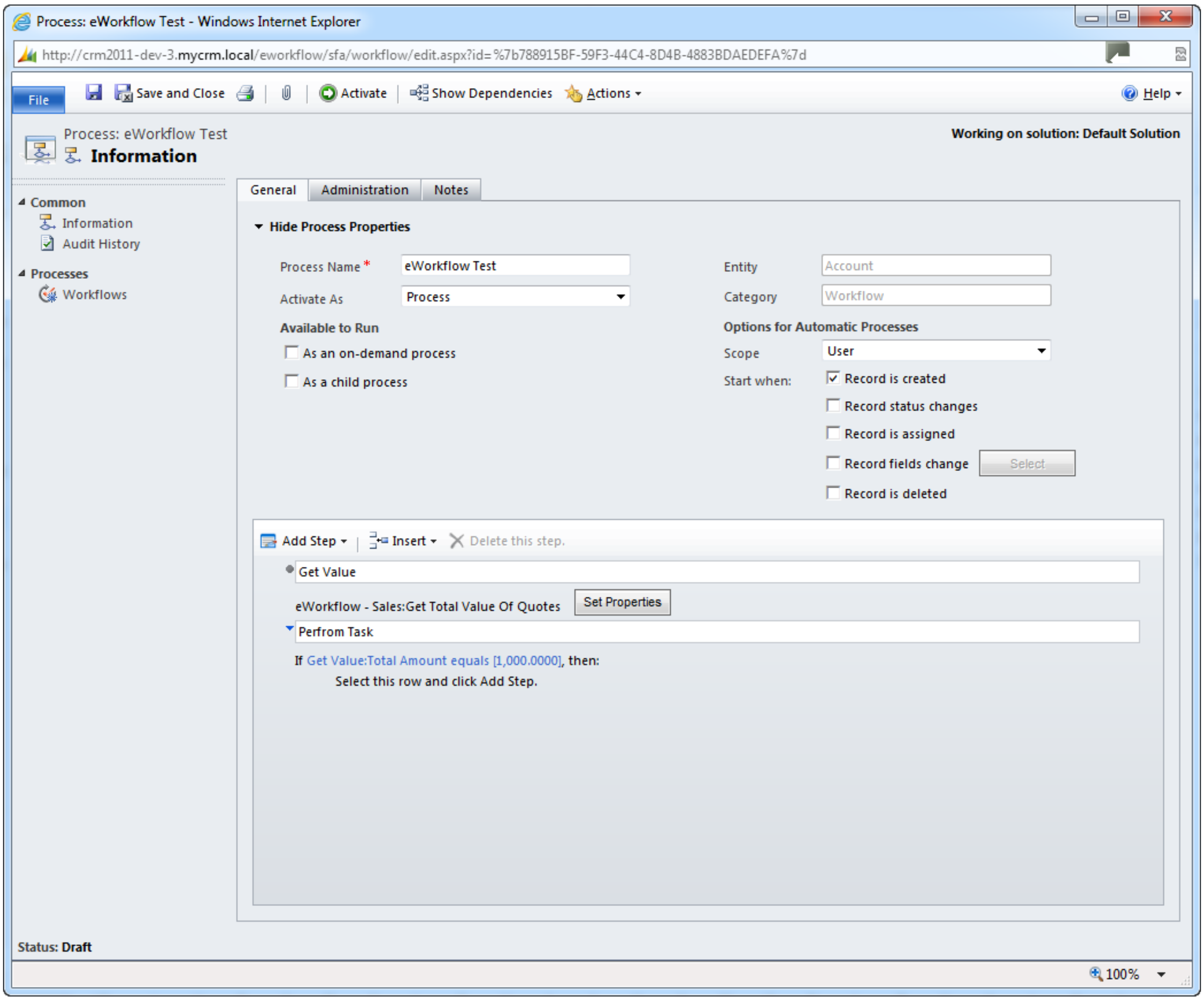
Function Call :- Output
Total Amount (Money)

Function – TotalValueOfQuotes

With the Total Quote value count, you can now perform workflow actions based on the total value of current Quotes for a customer, in the example we test to see if an account has reached the £1000 GBP Value

Function Call :- Input
Account (Object)
Contact (Object)

Example 35.1



Function Call :- Output
Total Amount (Money)

MyWorkflow – Other

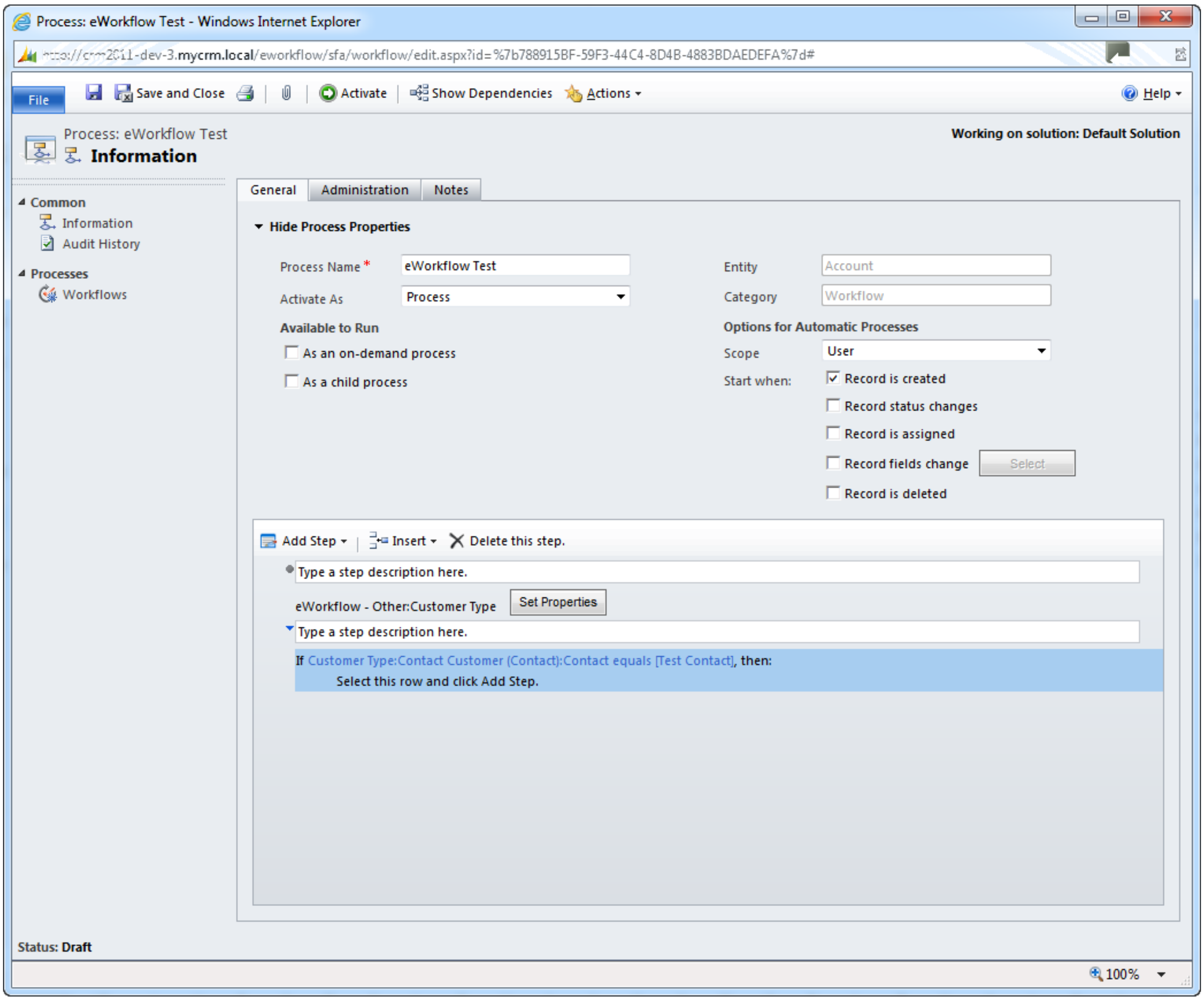
Function – CustomerType

When configuring and setting up business workflows there are a number of occasions that you may need to validate the customer type, currently this is not possible in CRM so this extended function can be used to validate a customer type and expose the related data for that customer (Account / Contact) in the workflow process.

An example may be when running workflows off the back of an Opportunity or Order and having to validate if the order is for a contact or an account

Function Call :- Input
N/A

Example 36.1



Function Call :- Output
CustomerType:Contact
CustomerType:Account
CustomerType (String)

For Additional Information

Contact: Mike Spink

Email : *sales@mycrmgroup.com* or *mike@mycrmgroup.com*

Phone: 01983 245245

Web: *www.mycrmgroup.com*