

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

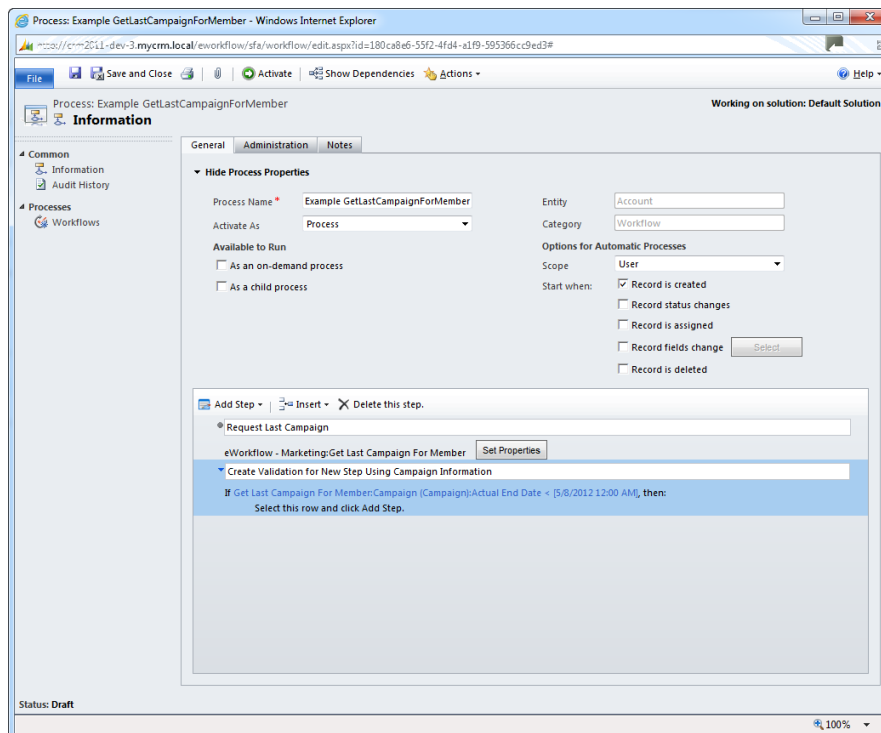
This function call enables a user to return the last campaign that an Account, Contact or Lead was entered into, by having this information via a workflow a business process can easily be created to see if a customer type is responding to campaigns or if a customer has been involved in to many campaigns.

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.

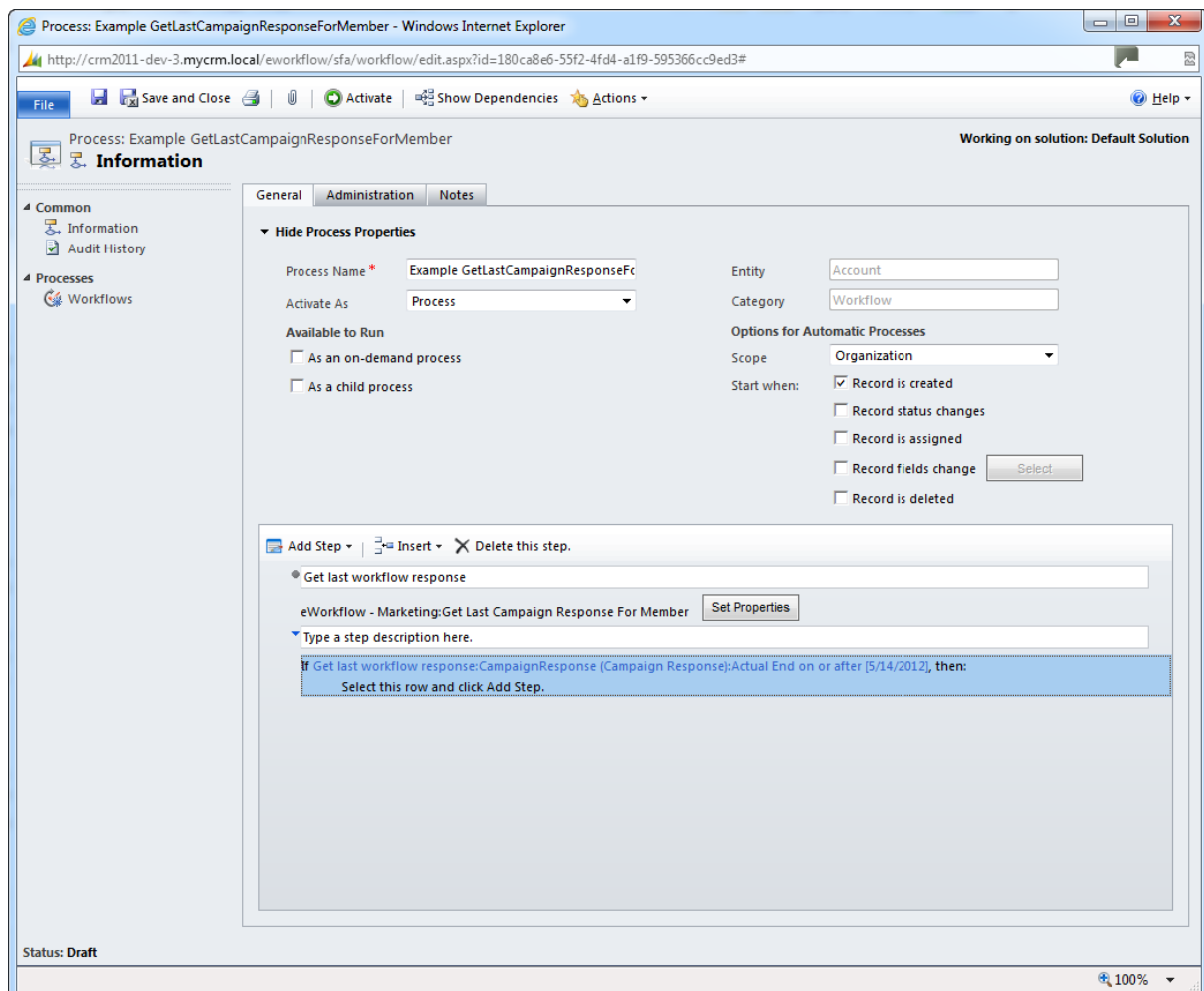
Function Call :- Output
All Campaign Fields on the Published Form

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



The screenshot shows the 'Process: Example GetLastCampaignResponseForMember' configuration window in a web browser. The interface includes a menu bar with 'File', 'Save and Close', 'Activate', 'Show Dependencies', and 'Actions'. The main area is divided into 'General', 'Administration', and 'Notes' tabs. The 'General' tab is active, showing the following fields:

- Process Name:** Example GetLastCampaignResponseFc
- Entity:** Account
- Category:** Workflow
- Activate As:** Process
- Options for Automatic Processes:**
 - Scope:** Organization
 - Start when:**
 - ☒ Record is created
 - ☐ Record status changes
 - ☐ Record is assigned
 - ☐ Record fields change
 - ☐ Record is deleted

Below the configuration fields, there is a section for 'Add Step' with a dropdown menu and a 'Delete this step.' button. The first step is 'Get last workflow response' with a description: 'eWorkflow - Marketing: Get Last Campaign Response For Member'. A 'Set Properties' button is next to it. Below the description, there is a blue highlighted row with the text: 'Get last workflow response: CampaignResponse (Campaign Response): Actual End on or after [5/14/2012], then: Select this row and click Add Step.'

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 Working on solution: Default Solution

Information

Common

- Information
- Audit History

Processes

- Workflows

General Administration Notes

Hide Process Properties

Process Name * Example GetLastCampaignResponseFc Entity Account

Activate As Process Category Workflow

Available to Run

☐ As an on-demand process

☐ As a child process

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

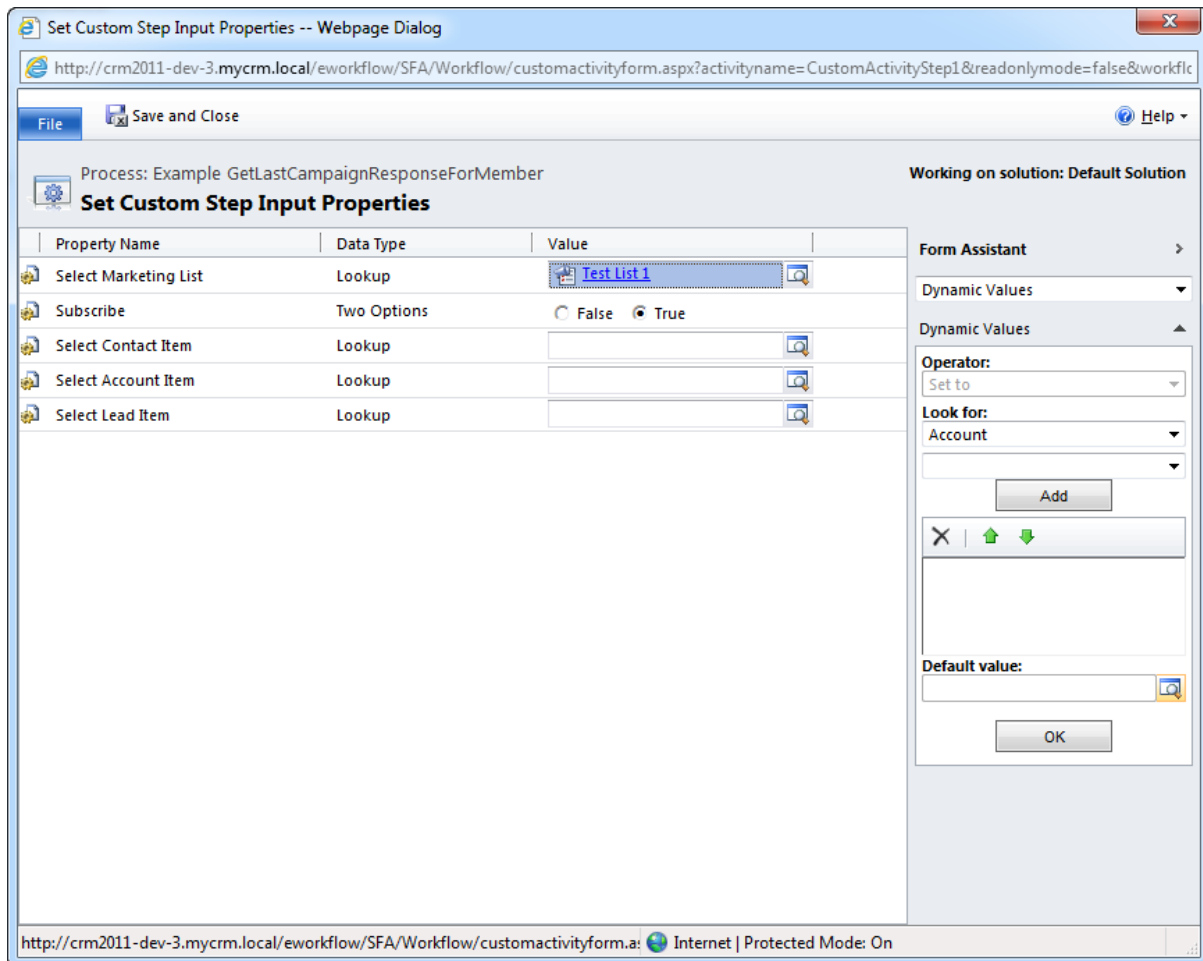
eWorkflow - Marketing:Subscribe/Unsubscribe Member To/From Marketing List Set Properties

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



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: Example GetLastCampaignResponseForMember
Set Custom Step Input Properties

Property Name	Data Type	Value
Select Marketing List	Lookup	Test List 1
Subscribe	Two Options	<input type="radio"/> False <input checked="" type="radio"/> True
Select Contact Item	Lookup	
Select Account Item	Lookup	
Select Lead Item	Lookup	

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set to

Look for: Account

Add

Default value:

OK

http://crm2011-dev-3.mycrm.local/eworkflow/SFA/Workflow/customactivityform.a: Internet | Protected Mode: On

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.

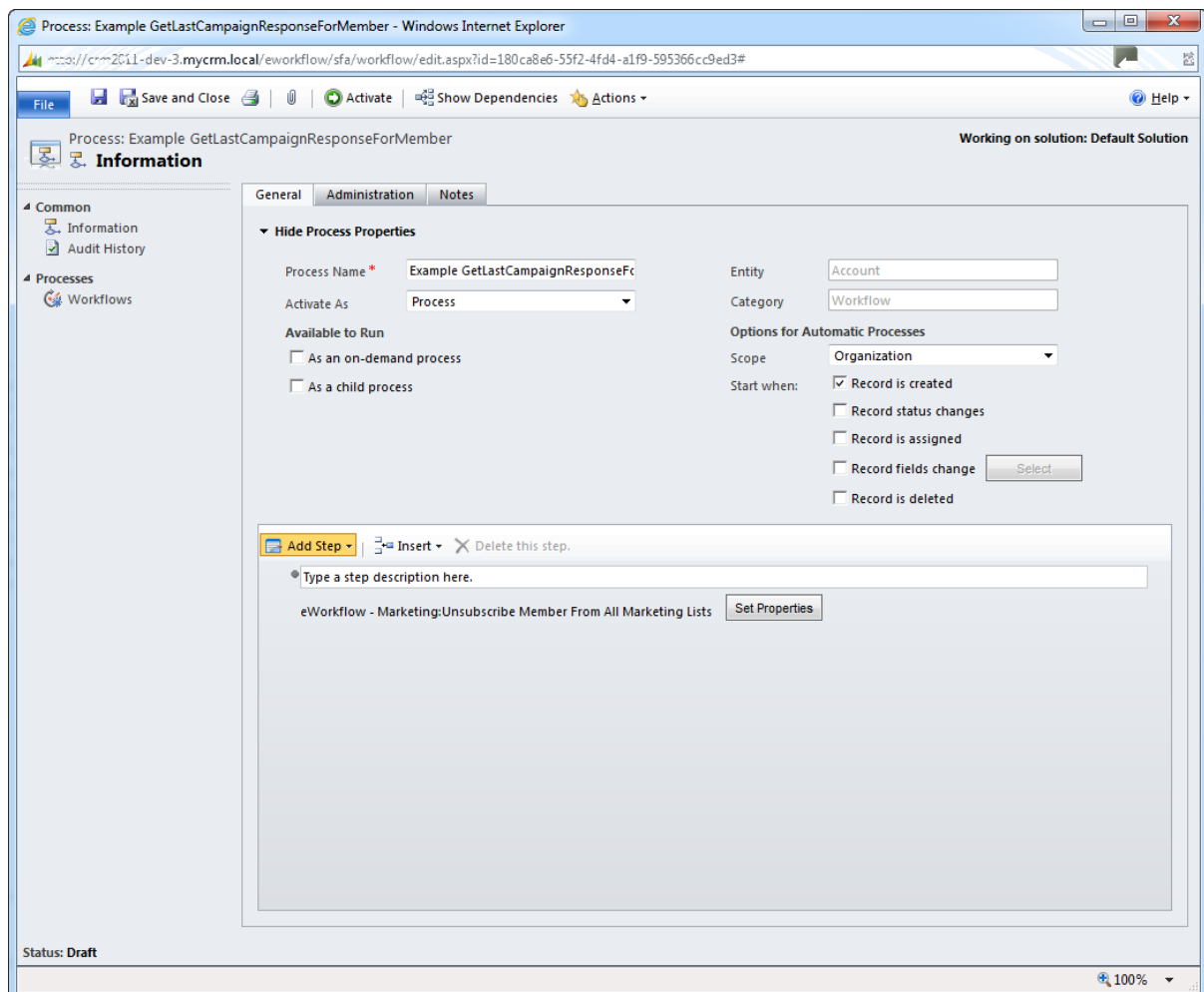
Function – UnsubscribeMemberFromAllMarketingLists

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



The screenshot displays the 'Process: Example GetLastCampaignResponseForMember' configuration window in a web browser. The interface includes a sidebar with 'Common' (Information, Audit History) and 'Processes' (Workflows) sections. The main area is divided into 'General', 'Administration', and 'Notes' tabs. Under the 'General' tab, the 'Hide Process Properties' section is expanded, showing fields for 'Process Name' (Example GetLastCampaignResponseFc), 'Entity' (Account), 'Category' (Workflow), and 'Activate As' (Process). The 'Available to Run' section has checkboxes for 'As an on-demand process' and 'As a child process'. The 'Options for Automatic Processes' section includes a 'Scope' dropdown (Organization) and checkboxes for 'Record is created' (checked), 'Record status changes', 'Record is assigned', 'Record fields change', and 'Record is deleted'. A 'Select' button is next to the 'Record fields change' checkbox. At the bottom, there is a 'Type a step description here.' text area with a 'Set Properties' button. The status bar at the bottom left indicates 'Status: Draft'.

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 Entity Contact

Activate As Process Category Workflow

Available to Run

☒ As an on-demand process

☐ As a child process

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 update 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



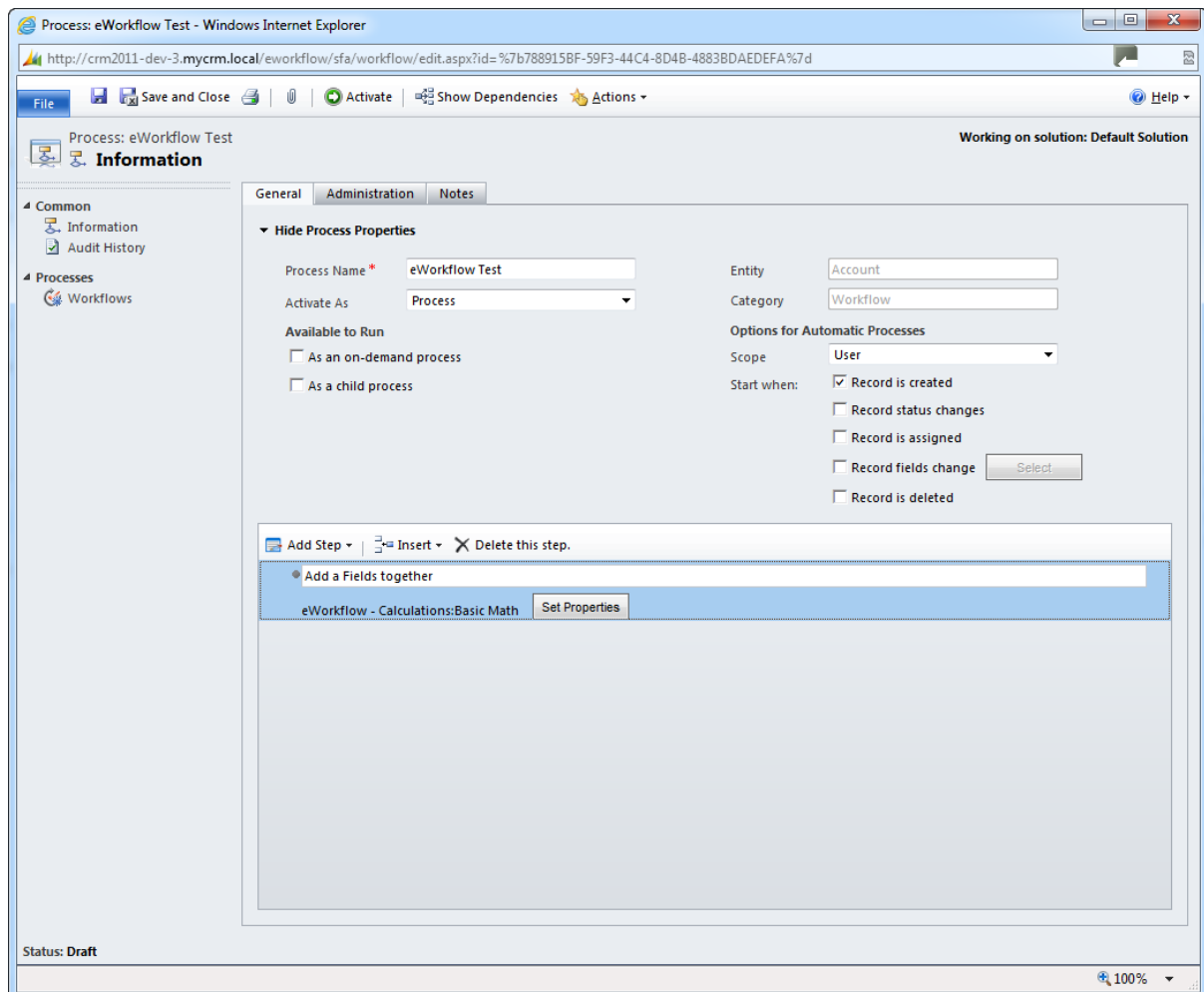
Function – BasicMath

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



The screenshot shows the 'eWorkflow Test' configuration window in a web browser. The 'General' tab is active, displaying the following settings:

- Process Name:** eWorkflow Test
- Entity:** Account
- Category:** Workflow
- Activate As:** Process
- Options for Automatic Processes:**
 - Scope:** User
 - Start when:**
 - ☒ Record is created
 - ☐ Record status changes
 - ☐ Record is assigned
 - ☐ Record fields change
 - ☐ Record is deleted

Below the configuration fields, there is a section for adding steps. A step titled 'Add a Fields together' is currently selected, with the calculation 'eWorkflow - Calculations:Basic Math' and a 'Set Properties' button.

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

Function Call :- Output

Result (Number)

Function – ConvertTextToNum

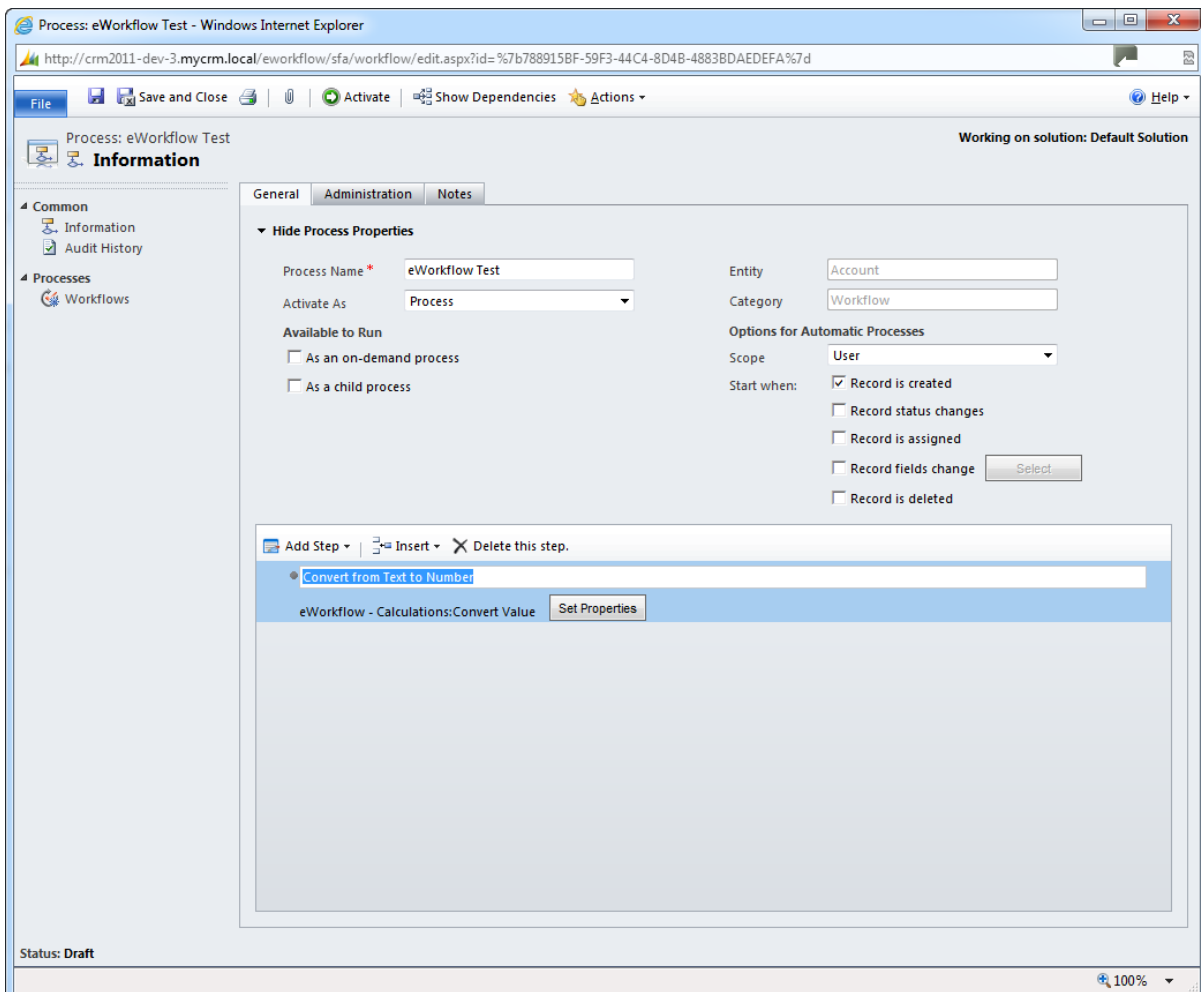
This workflow function enables the conversion of number type from Text and outputs a number of options so that a record or data can be manipulated

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



The screenshot shows the 'Process: eWorkflow Test' configuration window in a web browser. The 'General' tab is active, displaying various settings for the workflow process. The 'Process Name' is 'eWorkflow Test', and the 'Entity' is 'Account'. The 'Category' is 'Workflow'. Under 'Options for Automatic Processes', the 'Scope' is set to 'User', and the 'Start when' condition is 'Record is created'. The 'Available to Run' section shows 'As an on-demand process' and 'As a child process' options. The 'Add Step' button is highlighted, and the 'Convert from Text to Number' function is selected in the list. The 'Set Properties' button is also visible.

Process: eWorkflow Test - Windows Internet Explorer

http://crm2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=%7b788915BF-59F3-44C4-8D4B-4883BDAEFA%7d

File Save and Close Activate Show Dependencies Actions Help

Process: eWorkflow Test Working on solution: Default Solution

Information

Common Information Audit History

Processes Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test Entity Account

Activate As Process Category Workflow

Available to Run

☐ As an on-demand process

☐ As a child process

Options for Automatic Processes

Scope User

Start when: ☒ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record fields change Select

☐ Record is deleted

Add Step Insert Delete this step.

Convert from Text to Number

eWorkflow - Calculations: Convert Value Set Properties

Status: Draft

100%

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



Function – EquationSolver/SumUp

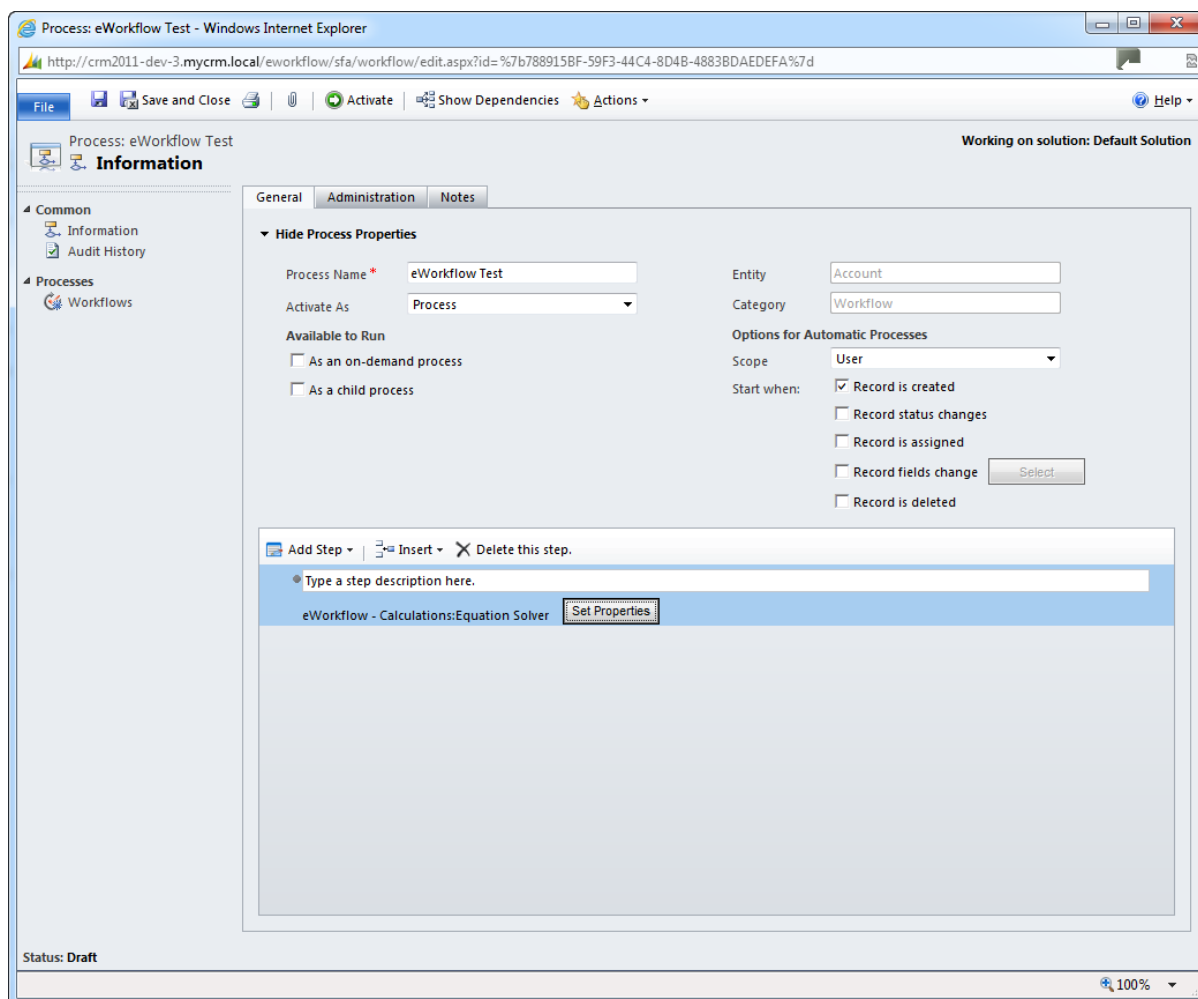
This great extended function enables an end user to perform complex or standard calculations on a given number in the CRM record where the workflow is applied

This work flow allows you to enter a calculation either fixed or based on values from other CRM fields and 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

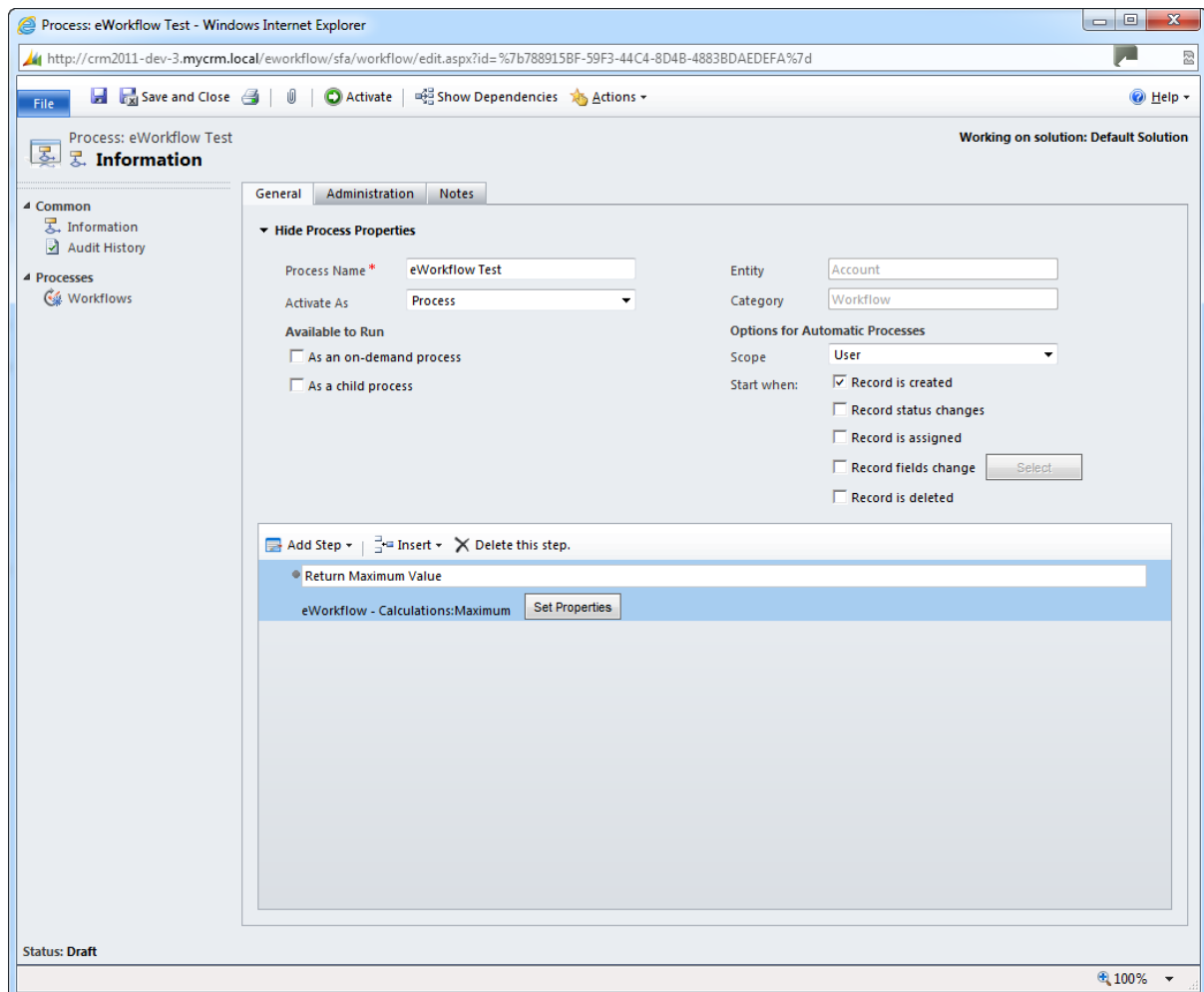
This extended workflow offers a business and end user the flexibility of performing a validation check against data held on CRM record,

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



The screenshot displays the 'eWorkflow Test' configuration window in a web browser. The interface includes a sidebar with 'Common' (Information, Audit History) and 'Processes' (Workflows) sections. The main area shows the 'General' tab with the following details:

- Process Name:** eWorkflow Test
- Entity:** Account
- Activate As:** Process
- Category:** Workflow
- Available to Run:**
 - ☐ As an on-demand process
 - ☐ As a child process
- Options for Automatic Processes:**
 - Scope:** User
 - Start when:**
 - ☒ Record is created
 - ☐ Record status changes
 - ☐ Record is assigned
 - ☐ Record fields change
 - ☐ Record is deleted

At the bottom, a step list shows 'Return Maximum Value' with a sub-label 'eWorkflow - Calculations:Maximum' and a 'Set Properties' button. The status at the bottom left is 'Draft'.

Function Call :- Output

Result (Number)

Function – CalculateMinimum

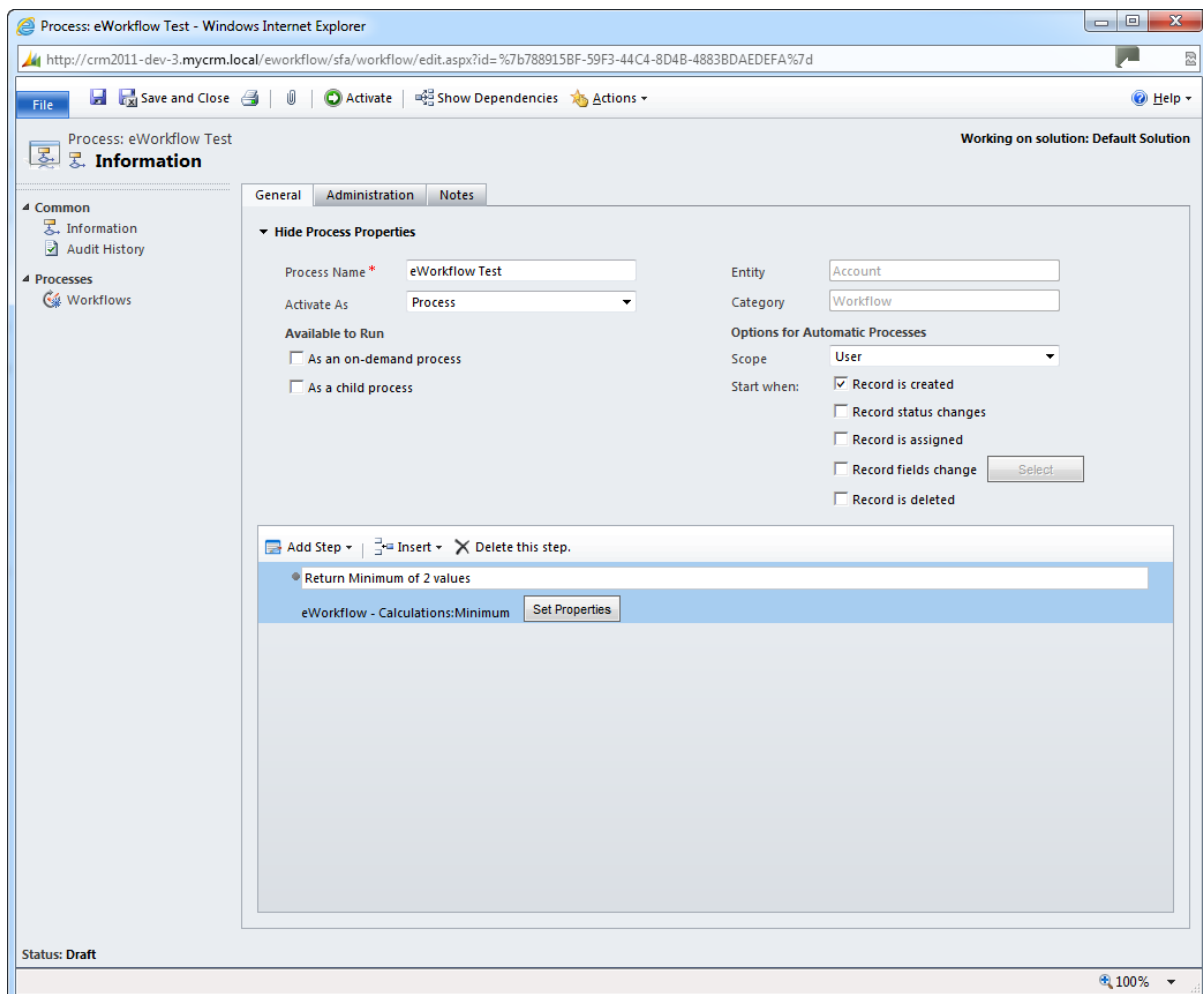
This workflow function will return the lower value of 2 numbers so again could be used as part of a wait statement for an account, contact to reach a certain level.

Function Call :- Input

First Number

Second Number

Example 10.1



The screenshot shows the 'eWorkflow Test' process configuration in the MyCRM system. The interface includes a sidebar with 'Common' and 'Processes' sections, and a main area with 'General', 'Administration', and 'Notes' tabs. The 'General' tab is active, displaying the following details:

- Process Name:** eWorkflow Test
- Entity:** Account
- Category:** Workflow
- Activate As:** Process
- Options for Automatic Processes:**
 - Scope:** User
 - Start when:**
 - ☒ Record is created
 - ☐ Record status changes
 - ☐ Record is assigned
 - ☐ Record fields change
 - ☐ Record is deleted

The 'Add Step' section shows a single step: 'Return Minimum of 2 values' (eWorkflow - Calculations:Minimum). The status is 'Draft'.

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

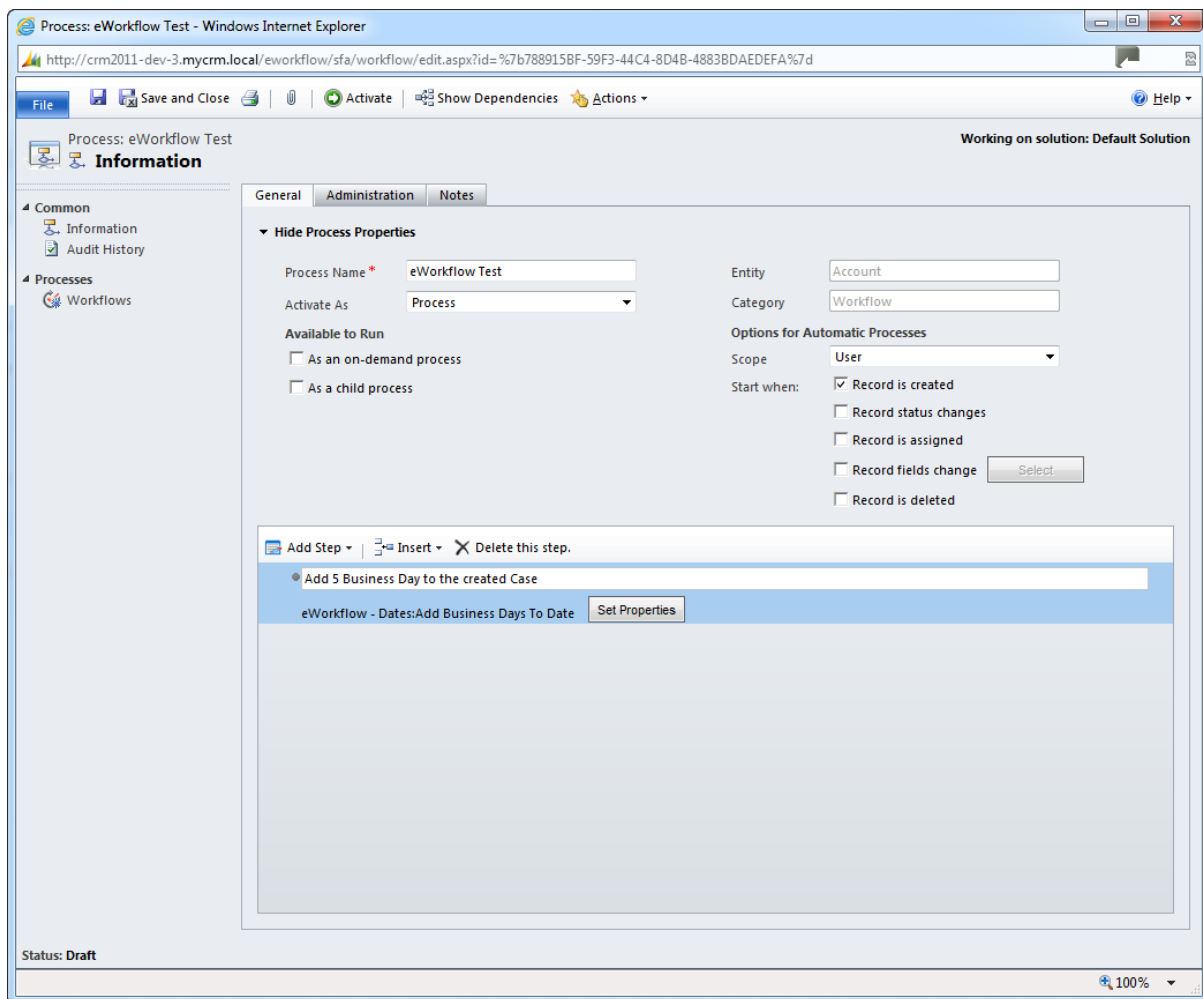
There are many examples where in a business process you would only want to add the related business days to a required part of a calculation, in most cases these would include follow up activities or the creation of Cases that are under SLA.

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

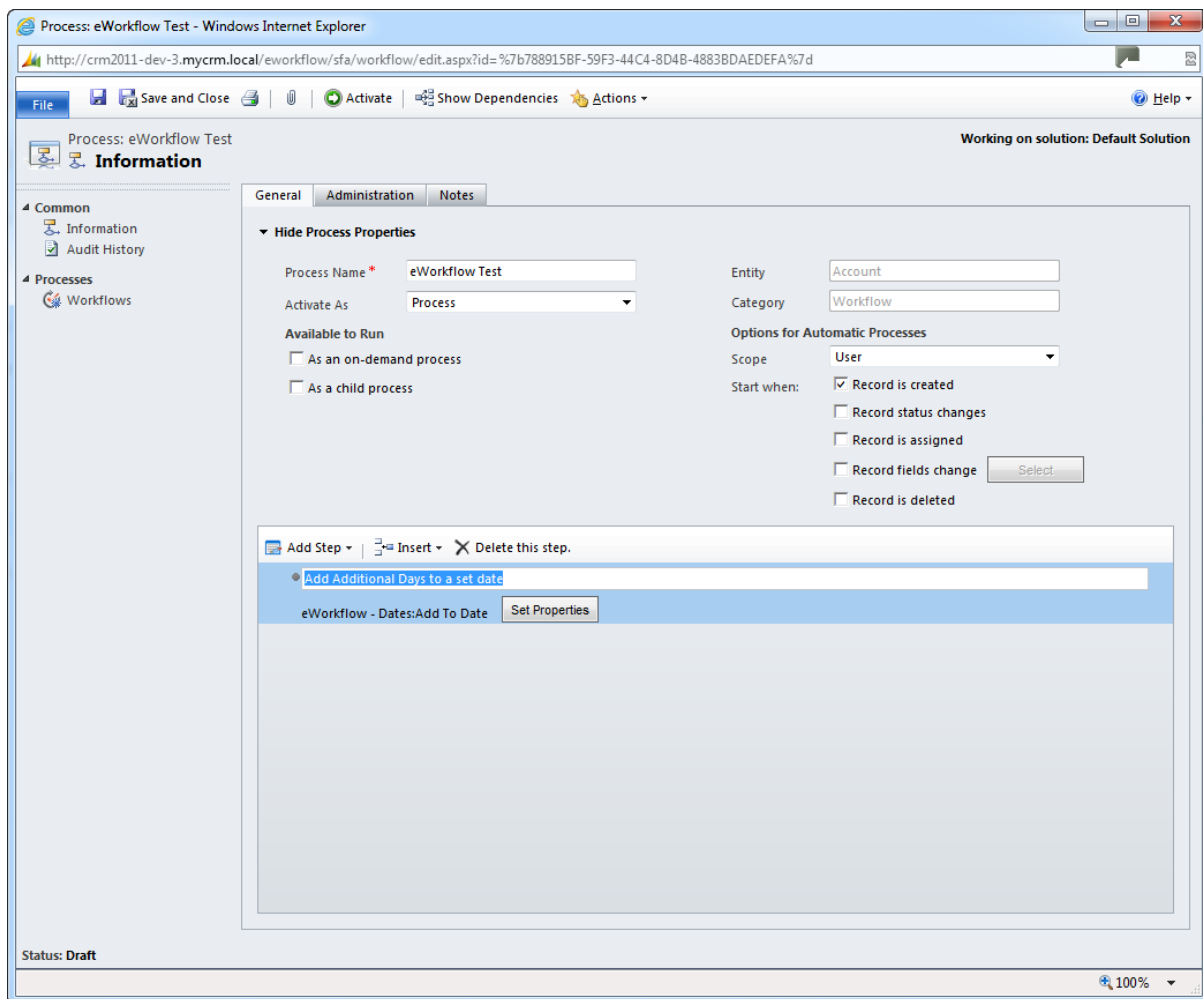
Result (Number)

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

Process: eWorkflow Test - Windows Internet Explorer

Process: eWorkflow Test

Working on solution: Default Solution

File Save and Close Activate Show Dependencies Actions Help

Information

Common Information Audit History

Processes Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test

Entity Account

Activate As Process

Category Workflow

Available to Run

☐ As an on-demand process

☐ As a child process

Options for Automatic Processes

Scope User

Start when:

☒ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record fields change Select

☐ Record is deleted

Add Step Insert Delete this step.

Calculate number of Days Between Day 1 and Day 2

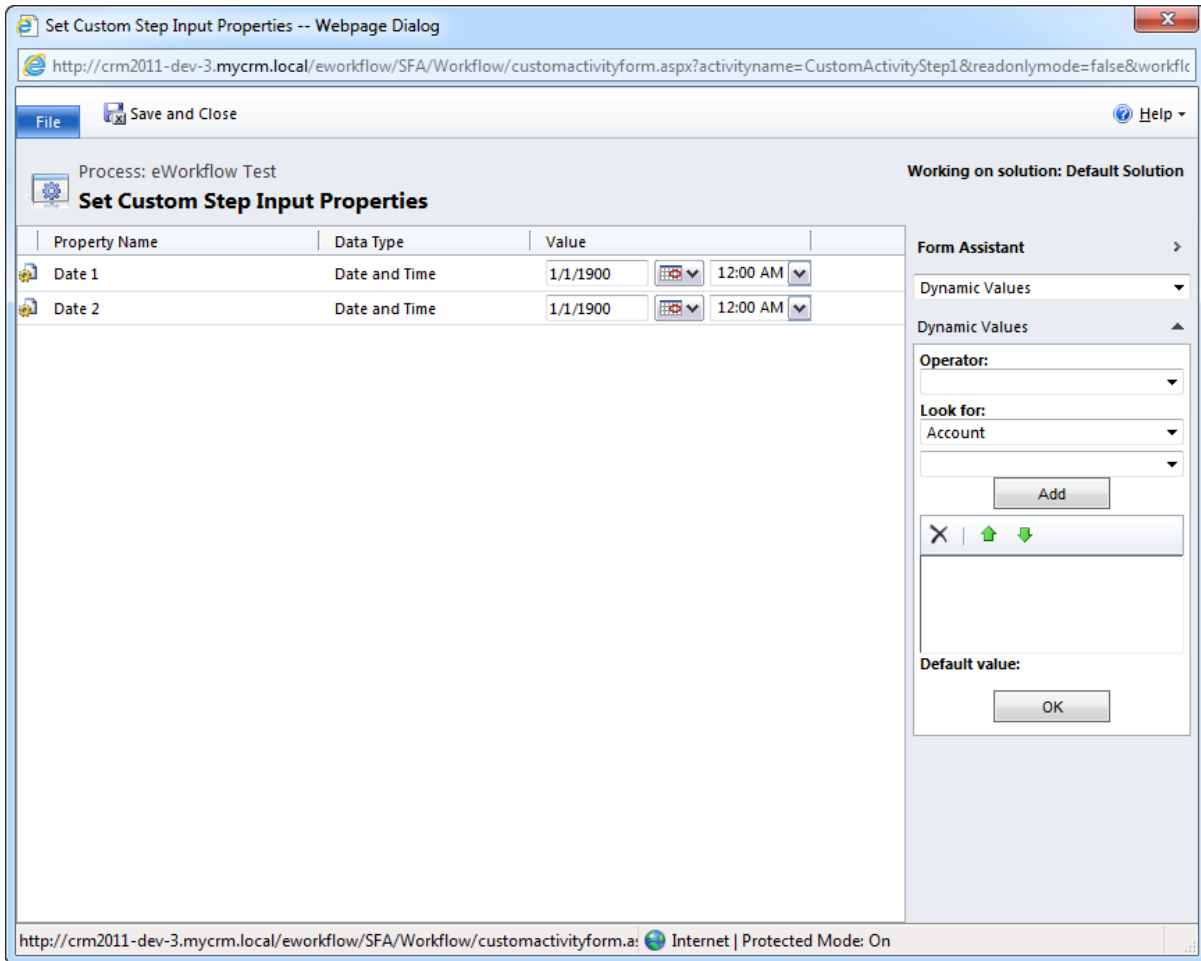
eWorkflow - Dates:Date Difference Set Properties

Status: Draft

100%

Dates are entered by setting the parameter on the settings screen

Example 13.2



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 Working on solution: Default Solution

Set Custom Step Input Properties

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

Operator:

Look for:

Account

Add

Default value:

OK

http://crm2011-dev-3.mycrm.local/eworkflow/SFA/Workflow/customactivityform.a: Internet | Protected Mode: On

Function Call :- Output

Days (Whole Number)

Hours (Whole Number)

Minutes (Whole Number)

Total Days (Whole Number)

Total Hours (Whole Number)

Total Minutes (Whole Number)

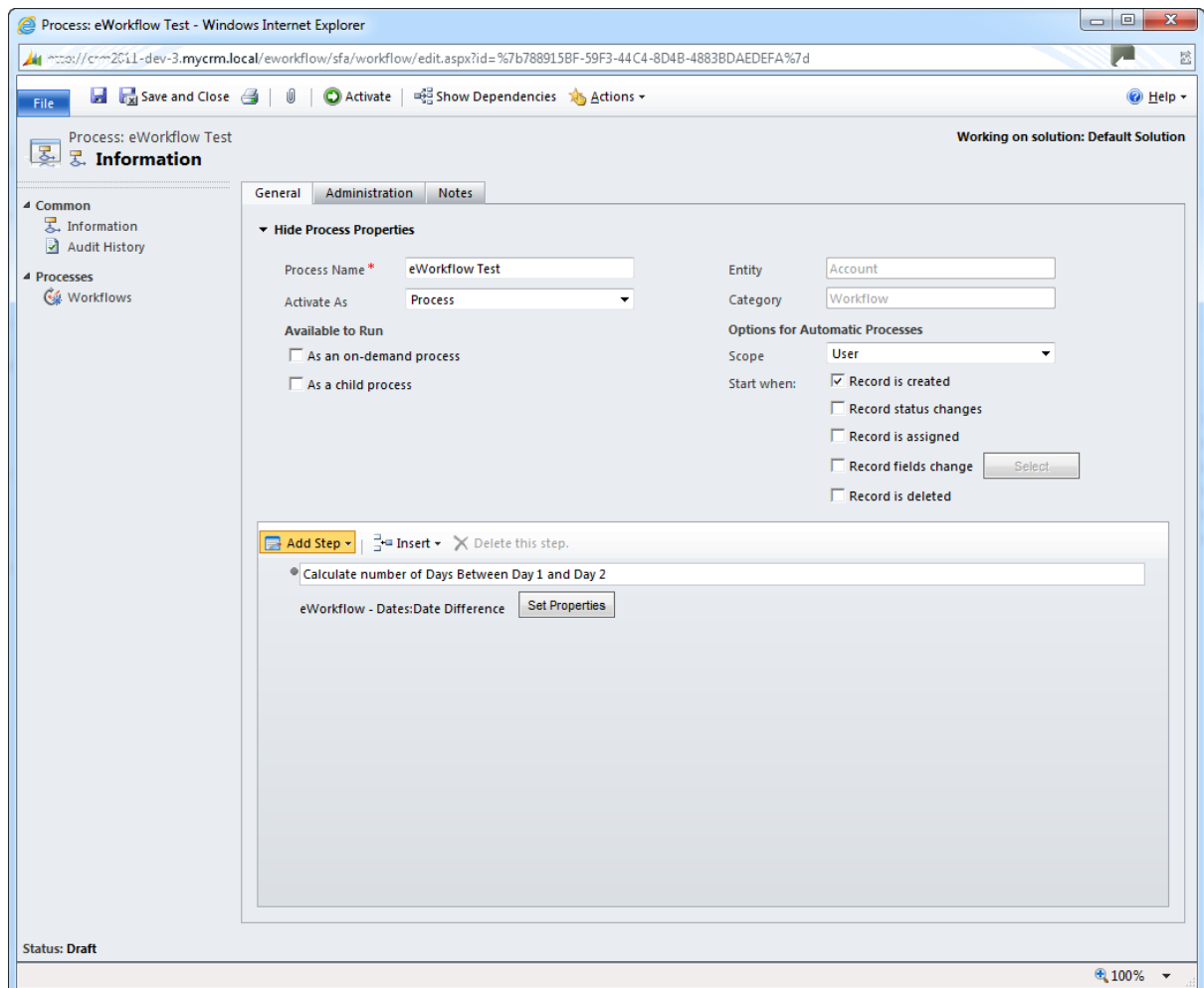
Function – DateDifferenceBusinessDay

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



Process: eWorkflow Test - Windows Internet Explorer

http://crm-2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=%7b788915bf-59f3-44c4-8d4b-4883bdaefda7%7d

File Save and Close Activate Show Dependencies Actions Help

Process: eWorkflow Test Working on solution: Default Solution

Information

Common Information Audit History Processes Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test Entity Account

Activate As Process Category Workflow

Available to Run

☐ As an on-demand process

☐ As a child process

Options for Automatic Processes

Scope User

Start when:

☒ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record fields change Select

☐ Record is deleted

Add Step Insert Delete this step.

Calculate number of Days Between Day 1 and Day 2

eWorkflow - Dates:Date Difference Set Properties

Status: Draft

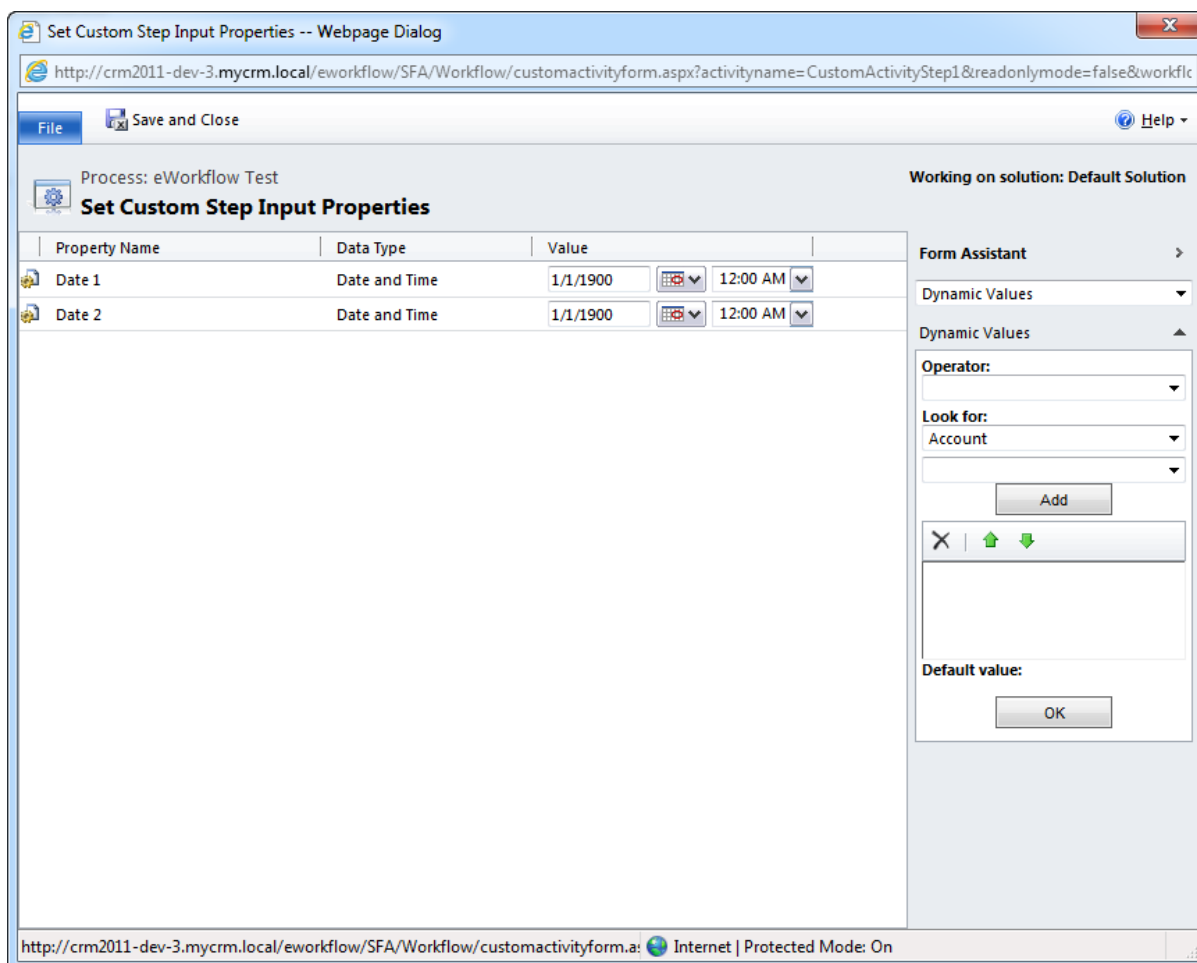
100%

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 Working on solution: Default Solution

Set Custom Step Input Properties

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

Operator:

Look for:

Account

Add

Default value:

OK

http://crm2011-dev-3.mycrm.local/eworkflow/SFA/Workflow/customactivityform.as Internet | Protected Mode: On

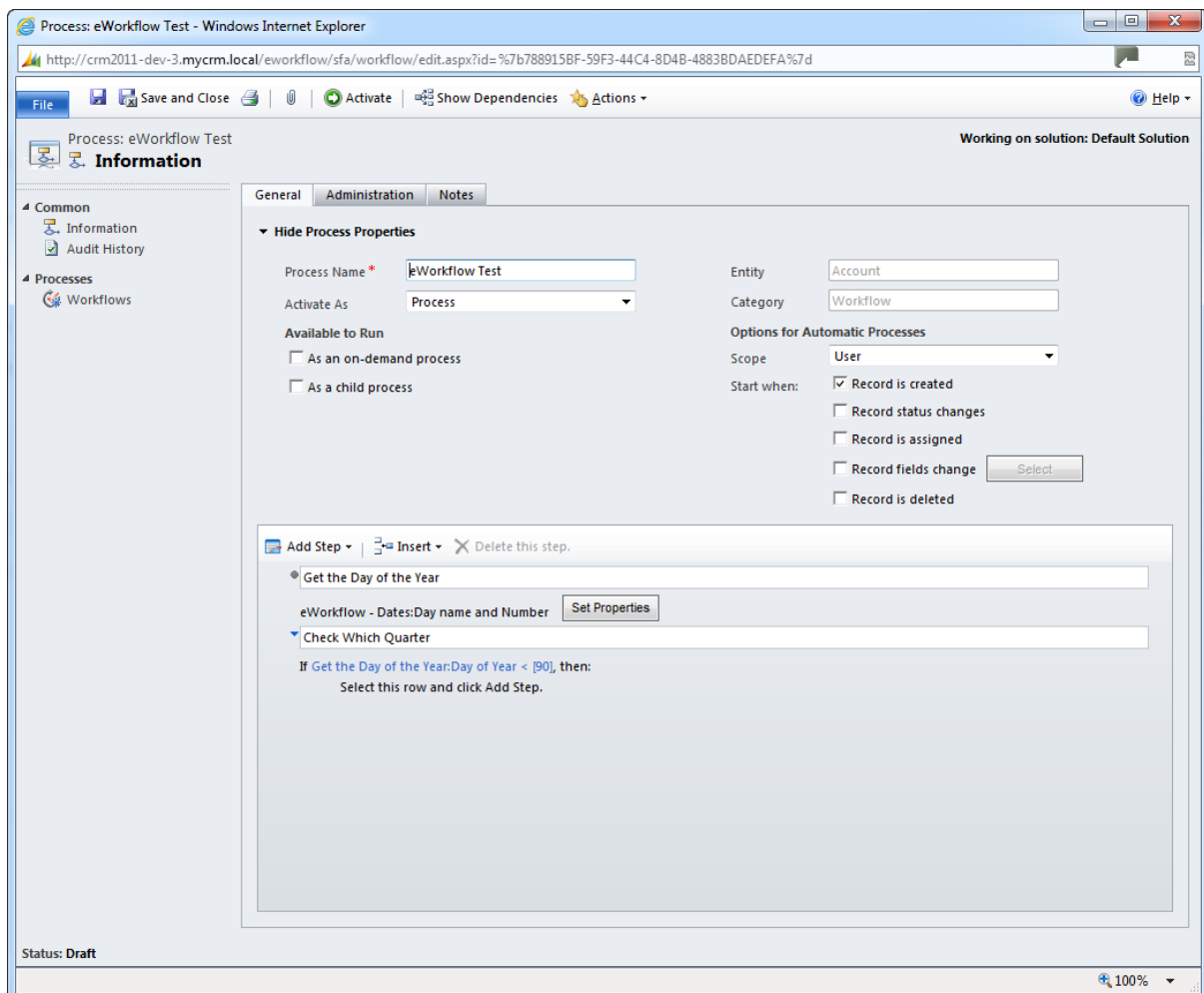
Function – GetDayNameAndNumber

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



The screenshot shows the 'Process: eWorkflow Test' configuration window in a Windows Internet Explorer browser. The URL is <http://crm2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=%7b788915BF-59F3-44C4-8D4B-4883BDAEDEF7d>. The interface includes a menu bar with 'File', 'Save and Close', 'Activate', 'Show Dependencies', and 'Actions'. The left sidebar shows 'Common' (Information, Audit History) and 'Processes' (Workflows). The main area has tabs for 'General', 'Administration', and 'Notes'. Under 'General', there are sections for 'Hide Process Properties' and 'Options for Automatic Processes'. The 'Hide Process Properties' section includes fields for 'Process Name' (eWorkflow Test), 'Entity' (Account), 'Category' (Workflow), 'Activate As' (Process), and 'Available to Run' (As an on-demand process, As a child process). The 'Options for Automatic Processes' section includes 'Scope' (User) and 'Start when' (Record is created, Record status changes, Record is assigned, Record fields change, Record is deleted). The 'Record fields change' option has a 'Select' button. Below these sections is a list of steps: 'Get the Day of the Year' (selected), 'eWorkflow - Dates:Day name and Number' (with a 'Set Properties' button), and 'Check Which Quarter'. A note below the steps says: 'If Get the Day of the Year:Day of Year < [90], then: Select this row and click Add Step.' The status at the bottom is 'Draft'.

Function Call :- Output

Day of the Week (number)

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



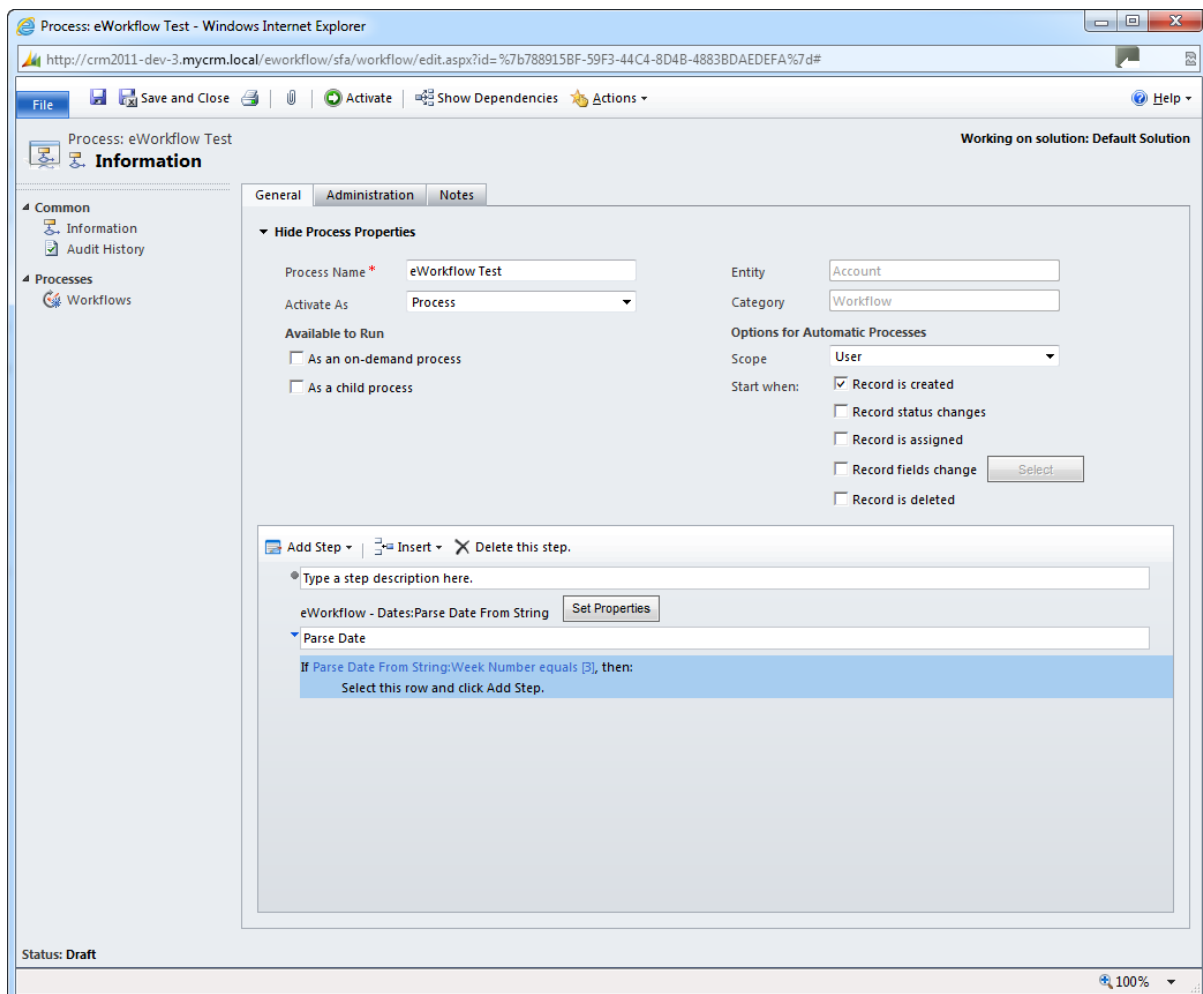
Function – ParseDateFromString

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



Process: eWorkflow Test - Windows Internet Explorer

http://crm2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=%7b788915BF-59F3-44C4-8D4B-4883BDAEFA%7d#

File Save and Close Activate Show Dependencies Actions Help

Process: eWorkflow Test Working on solution: Default Solution

Information

Common Information Audit History

Processes Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test

Entity Account

Activate As Process

Category Workflow

Options for Automatic Processes

Scope User

Start when: ☒ Record is created ☐ Record status changes ☐ Record is assigned ☐ Record fields change ☐ Record is deleted

Add Step Insert Delete this step.

Type a step description here.

eWorkflow - Dates:Parse Date From String Set Properties

Parse Date

If Parse Date From String:Week Number equals [3], then:

Select this row and click Add Step.

Status: Draft

100%

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

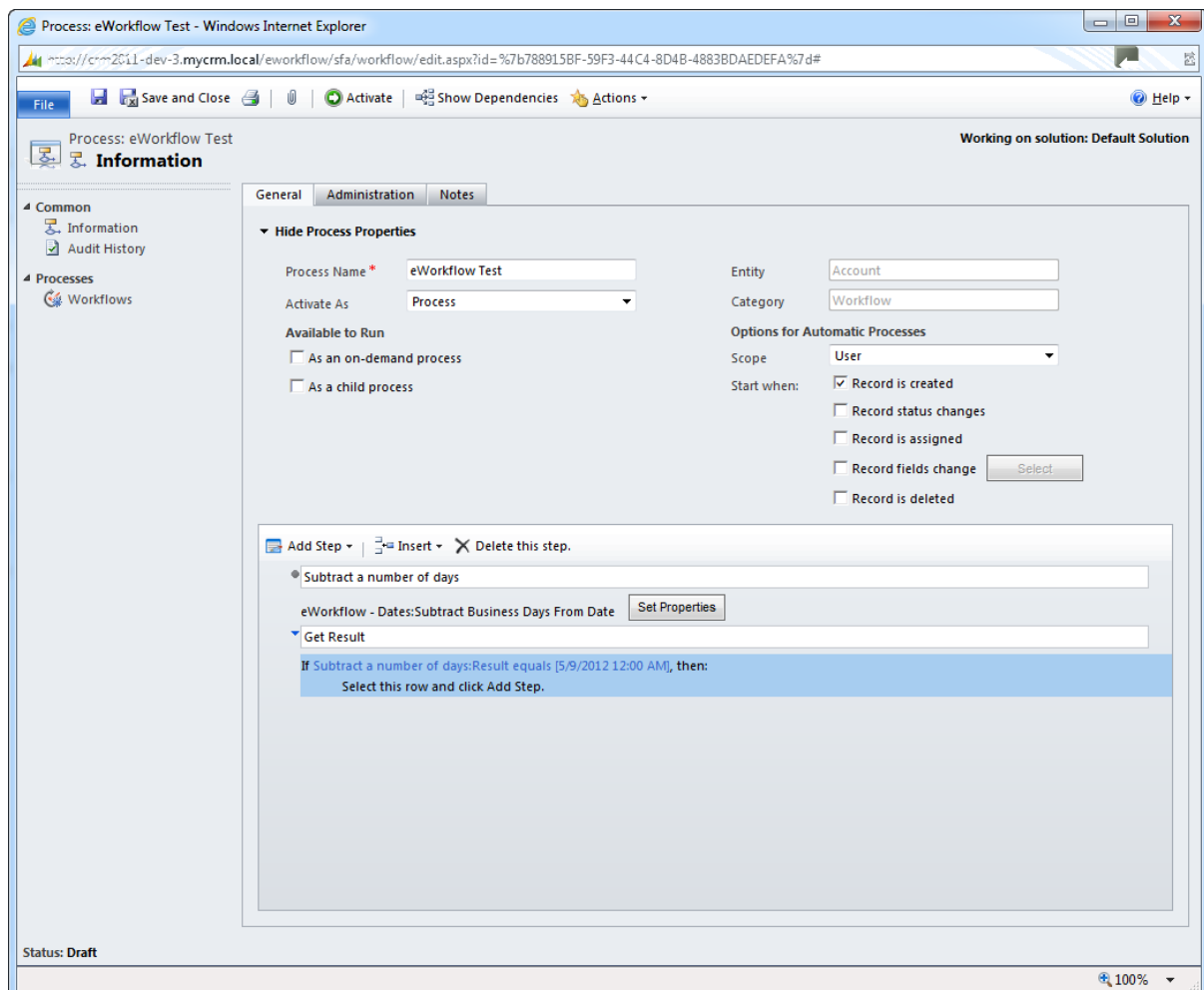


Function – SubtractBusinessDaysFromDate

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



The screenshot shows the 'Process: eWorkflow Test' configuration window in a Windows Internet Explorer browser. The 'General' tab is active, displaying various settings for the workflow process.

Process Information:

- Process Name: eWorkflow Test
- Entity: Account
- Category: Workflow
- Activate As: Process
- Options for Automatic Processes:
 - Scope: User
 - Start when:
 - ☒ Record is created
 - ☐ Record status changes
 - ☐ Record is assigned
 - ☐ Record fields change
 - ☐ Record is deleted

Available to Run:

- ☐ As an on-demand process
- ☐ As a child process

Steps:

- Add Step:** Subtract a number of days
- Get Result:** eWorkflow - Dates:Subtract Business Days From Date

Conditional Logic:

If Subtract a number of days:Result equals [5/9/2012 12:00 AM], then:

Select this row and click Add Step.

Status: Draft

Function Call :- Output
Result (CRM date)

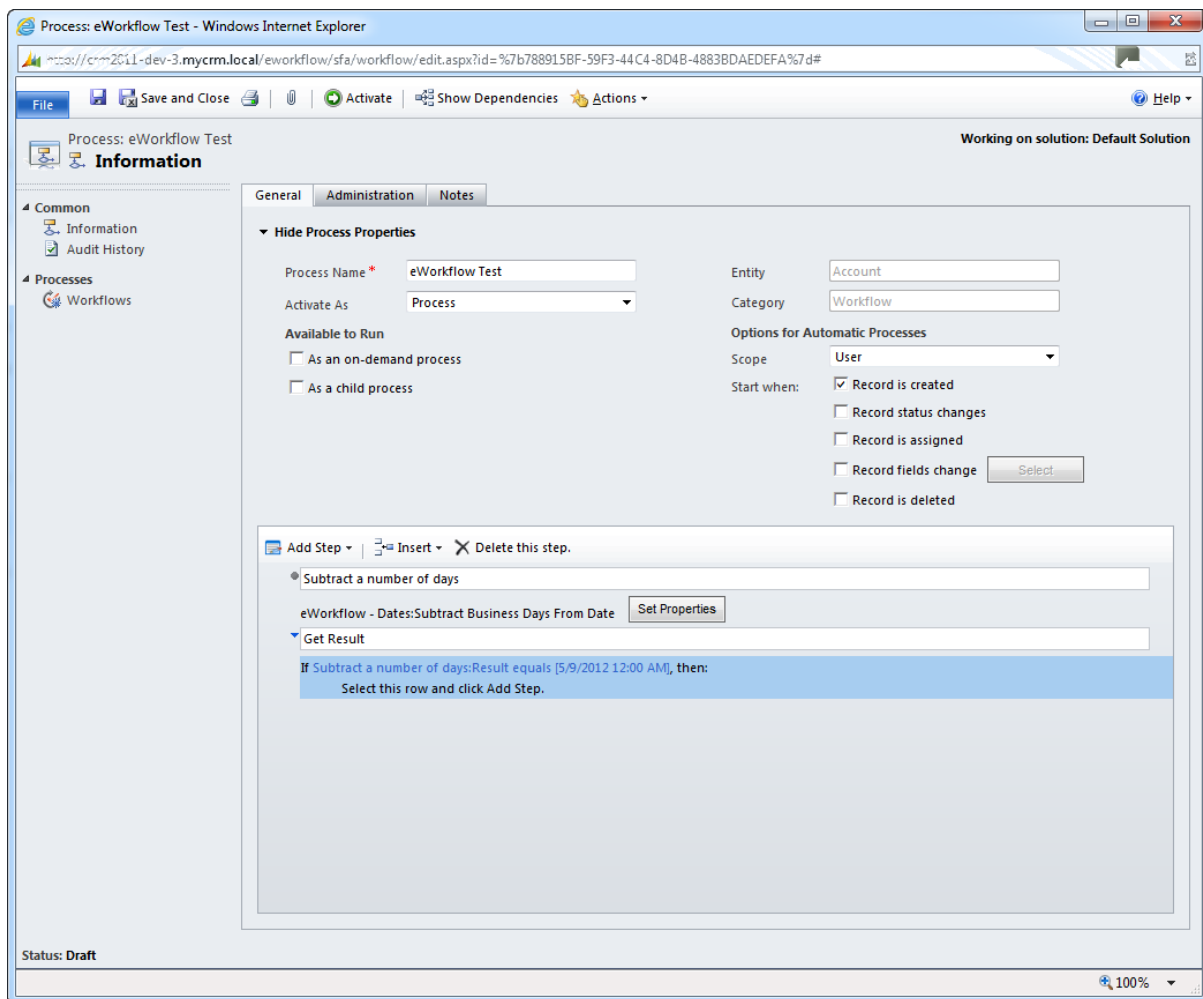
Function – SubtractDaysFromDate

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

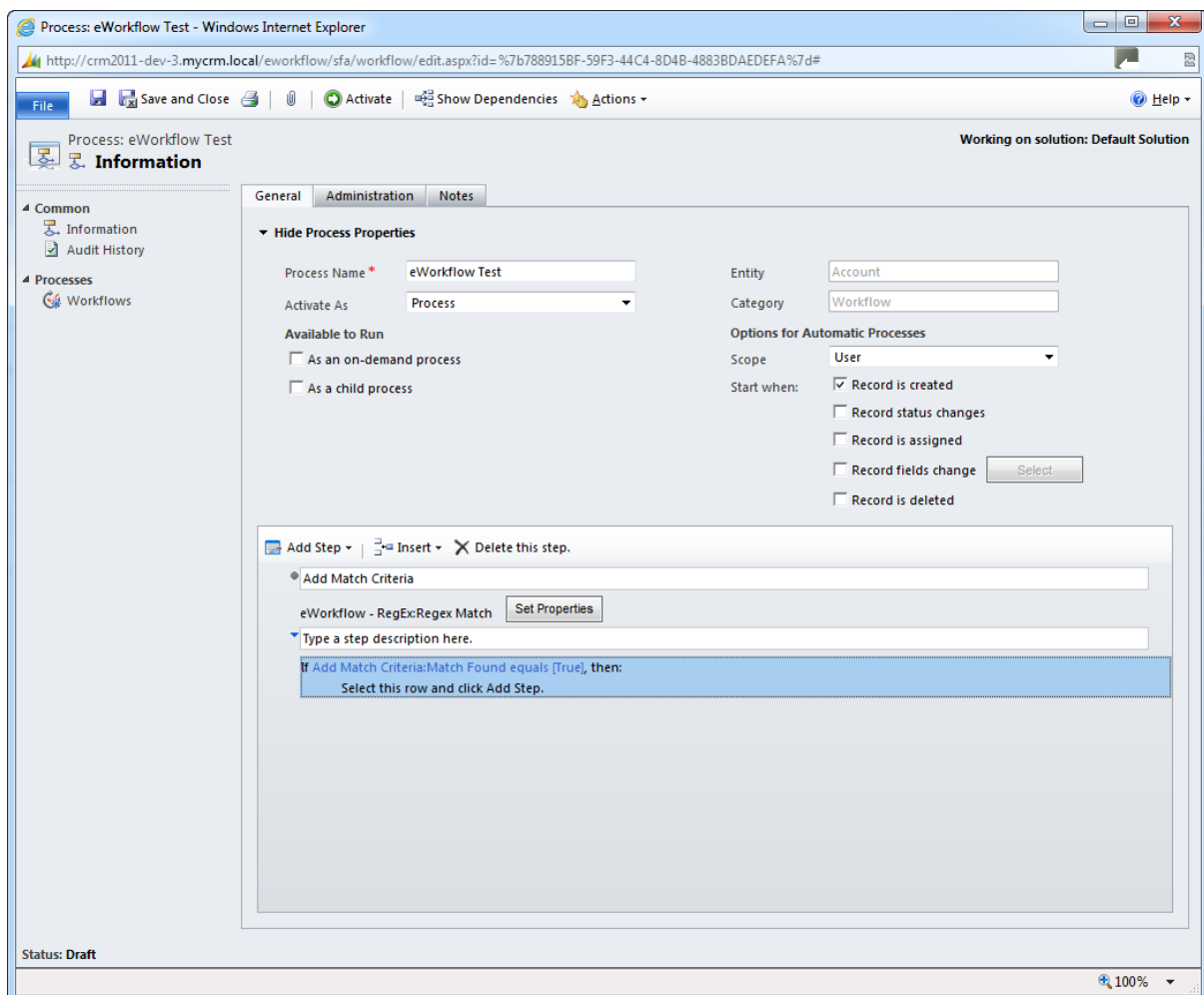
With this function call a workflow can be used to Match text in a body or field of data, regular expressions can be complex but are very powerful when usines in combination with workflow and CRM data Fields

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.

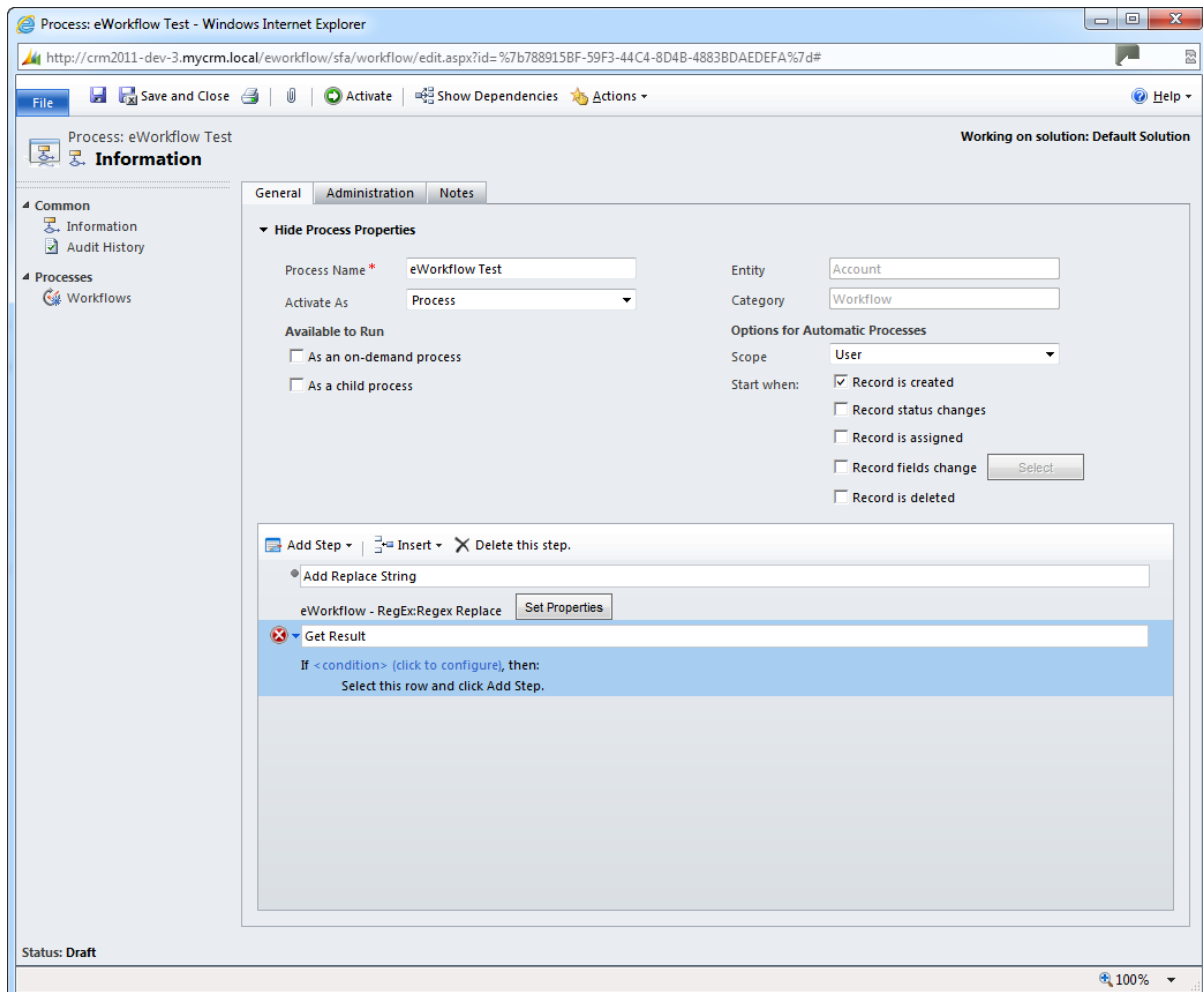
Function Call :- Input

Text (String)

Replacement (String)

Regular Expression (String)

Example 20.1



Process: eWorkflow Test - Windows Internet Explorer

http://crm2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=%7b7889158f-59f3-44c4-8d48-4883bdaefda%7d#

File Save and Close Activate Show Dependencies Actions Help

Process: eWorkflow Test Working on solution: Default Solution

Information

Common Information Audit History Processes Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test Entity Account

Activate As Process Category Workflow

Available to Run

☐ As an on-demand process

☐ As a child process

Options for Automatic Processes

Scope User

Start when: ☒ Record is created ☐ Record status changes ☐ Record is assigned ☐ Record fields change ☐ Record is deleted

Add Step Insert Delete this step.

Add Replace String

eWorkflow - RegEx:Regex Replace Set Properties

Get Result

If <condition> (click to configure), then:

Select this row and click Add Step.

Status: Draft

100%

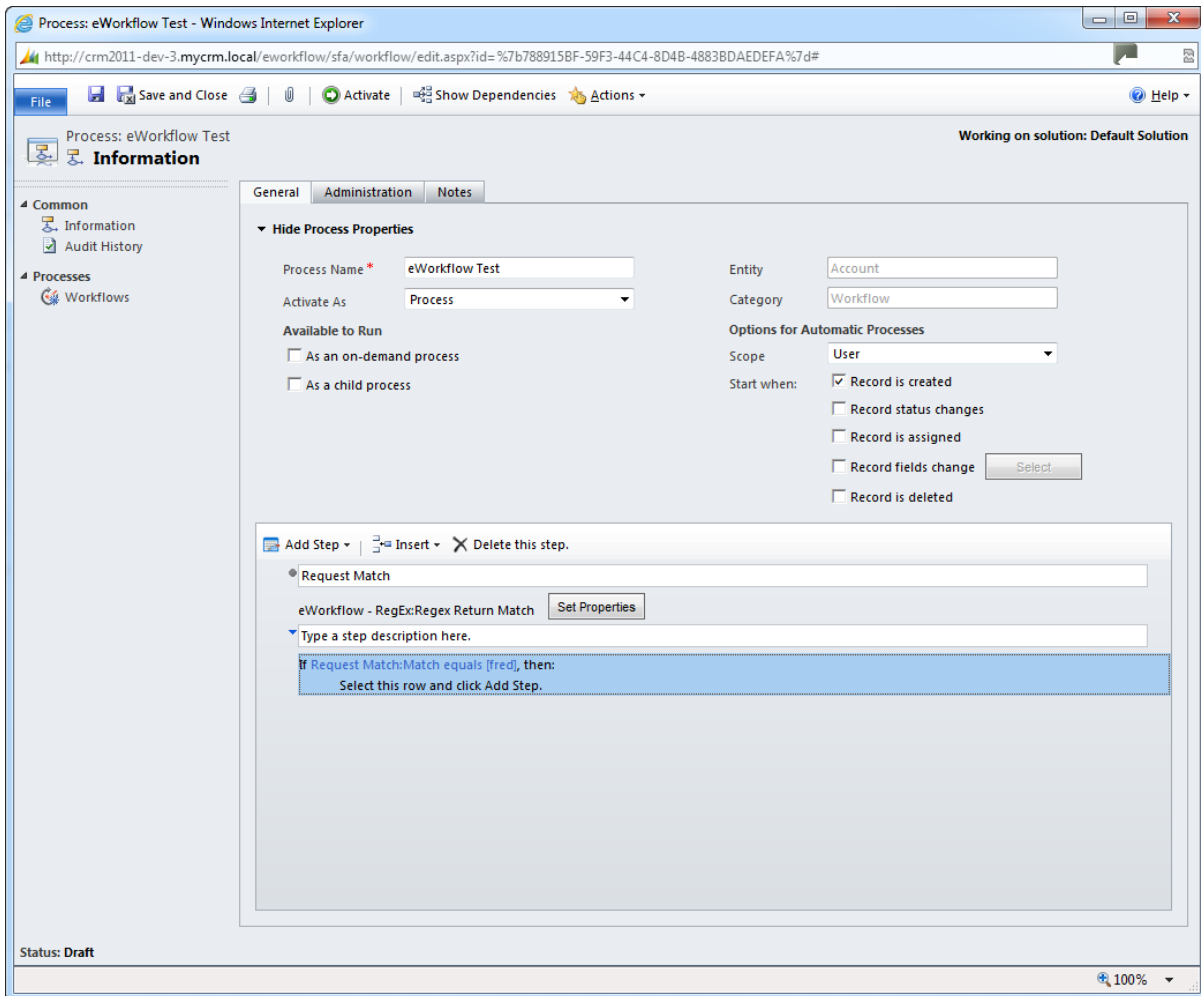
Function Call :- Output
Result (String)
Invalid Regular Expression

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



Process: eWorkflow Test - Windows Internet Explorer

http://crm2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=%7b788915BF-59F3-44C4-8D4B-4883BDAEFA%7d#

File Save and Close Activate Show Dependencies Actions Help

Process: eWorkflow Test Working on solution: Default Solution

Information

Common

Information

Audit History

Processes

Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test

Entity Account

Activate As Process

Category Workflow

Options for Automatic Processes

Scope User

Start when: ☒ Record is created ☐ Record status changes ☐ Record is assigned ☐ Record fields change ☐ Record is deleted

Available to Run

☐ As an on-demand process

☐ As a child process

Add Step Insert Delete this step.

Request Match

eWorkflow - RegEx:Regex Return Match Set Properties

Type a step description here.

If Request Match:Match equals [fred], then:

Select this row and click Add Step.

Status: Draft

100%

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

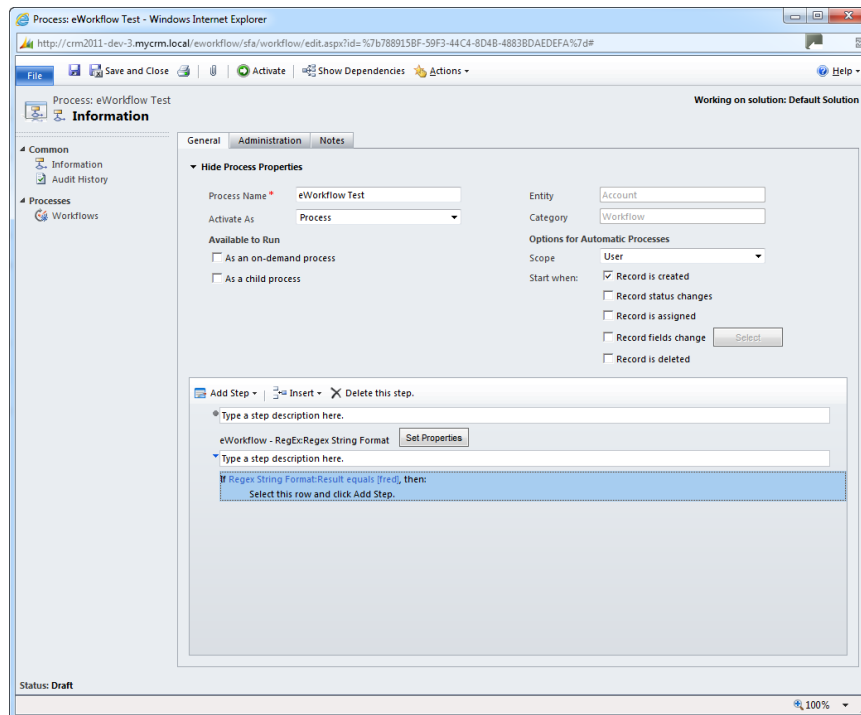
Function Call :- Input

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.

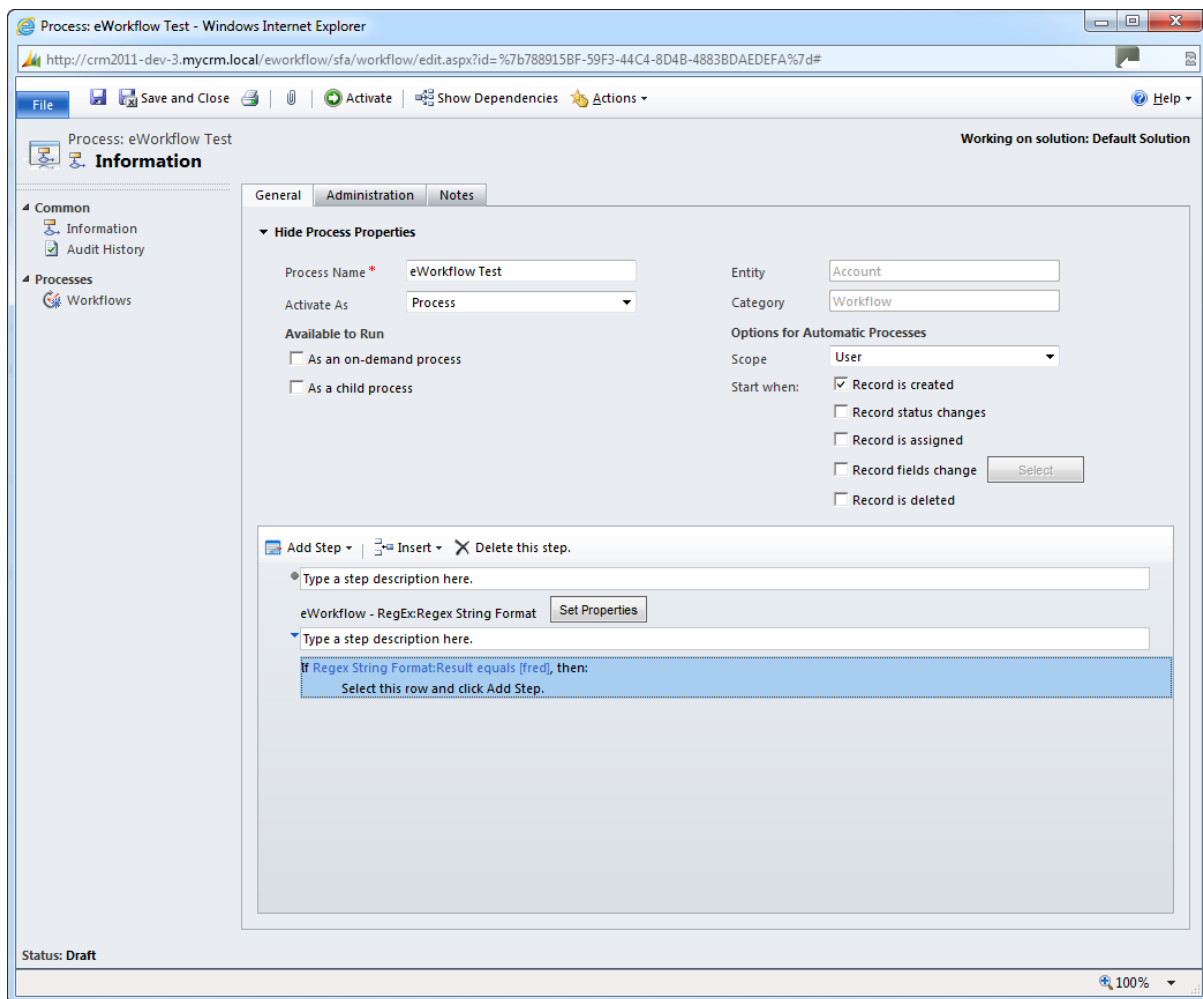
Function – CaptiliseString

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



Process: eWorkflow Test - Windows Internet Explorer

http://crm2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=%7b7889158F-59F3-44C4-8D4B-4883BDAEFA%7d#

File Save and Close Activate Show Dependencies Actions Help

Process: eWorkflow Test Working on solution: Default Solution

Information

Common

Information

Audit History

Processes

Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test

Entity Account

Activate As Process

Category Workflow

Options for Automatic Processes

Scope User

Start when: ☒ Record is created ☐ Record status changes ☐ Record is assigned ☐ Record fields change ☐ Record is deleted

Available to Run

☐ As an on-demand process

☐ As a child process

Add Step Insert Delete this step.

Type a step description here.

eWorkflow - RegEx:Regex String Format Set Properties

Type a step description here.

If RegEx String Format:Result equals [fred], then:

Select this row and click Add Step.

Status: Draft

100%

Function Call :- Output

Result (String)

Function – PadString

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

Function Call :- Input

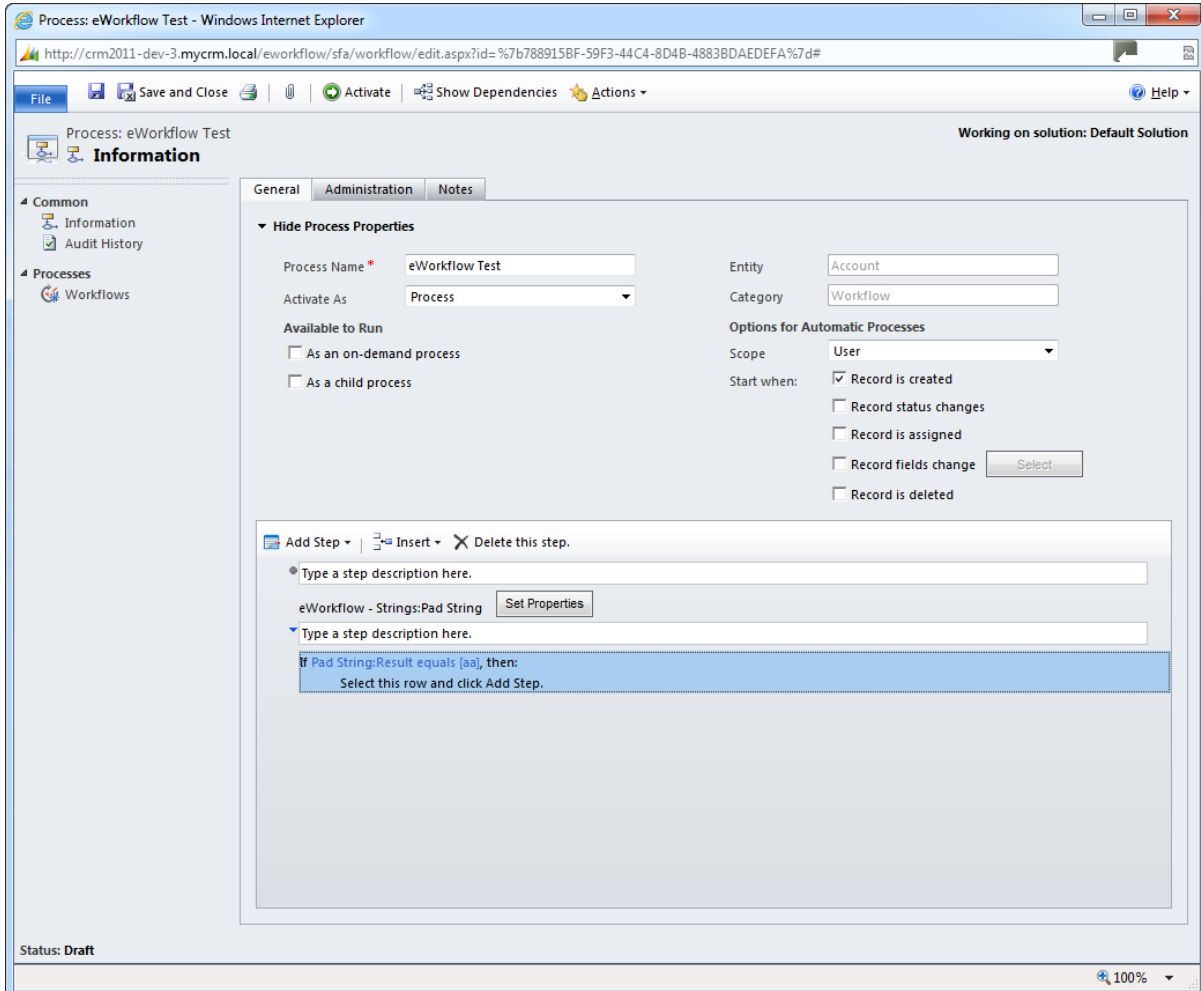
Text (String)

Pad Character (String)

Pad to Left (True / False)

Final Length (Whole Number)

Example 24.1



Function Call :- Output

Result (String)

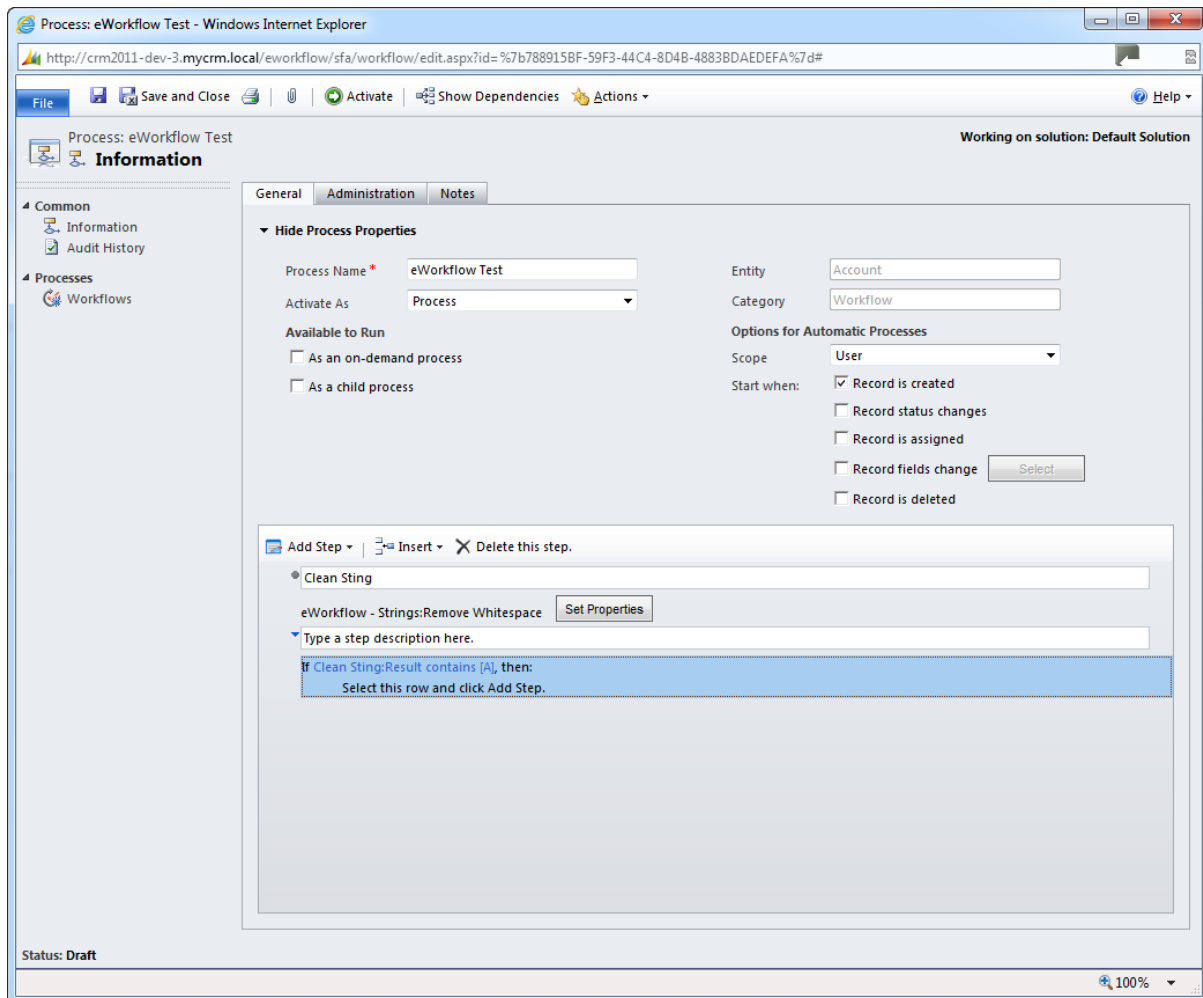
Function – RemoveWhitespace.

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

Function Call :- Input

Text (String)

Example 25.1



Process: eWorkflow Test - Windows Internet Explorer

http://crm2011-dev-3.mycrm.local/eflow/workflow/edit.aspx?id=%7b788915BF-59F3-44C4-8D4B-4883BDAEFA%7d#

File Save and Close Activate Show Dependencies Actions Help

Process: eWorkflow Test Working on solution: Default Solution

Information

Common Information Audit History

Processes Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test Entity Account

Activate As Process Category Workflow

Available to Run

☐ As an on-demand process

☐ As a child process

Options for Automatic Processes

Scope User

Start when: ☒ Record is created ☐ Record status changes ☐ Record is assigned ☐ Record fields change ☐ Record is deleted

Add Step Insert Delete this step.

Clean String

eWorkflow - Strings:Remove Whitespace Set Properties

Type a step description here.

Clean String:Result contains [A], then:
Select this row and click Add Step.

Status: Draft

100%

Function Call :- Output

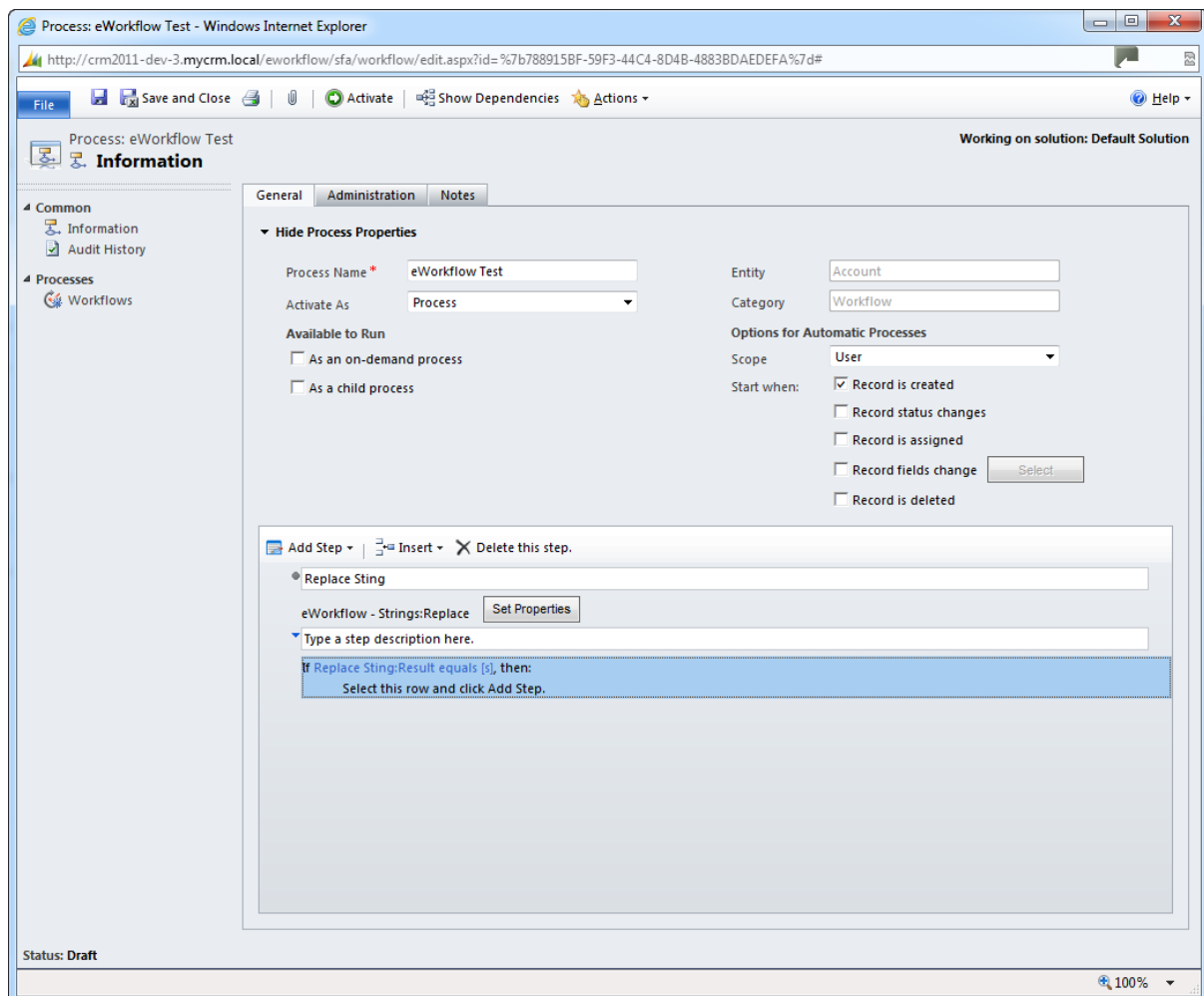
Result (String)

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



The screenshot shows the 'eWorkflow Test' configuration window in a web browser. The 'General' tab is active, displaying various process properties. The 'Process Name' is 'eWorkflow Test', 'Entity' is 'Account', and 'Category' is 'Workflow'. The 'Available to Run' section has two options: 'As an on-demand process' (checked) and 'As a child process' (unchecked). The 'Options for Automatic Processes' section has four options: 'Record is created' (checked), 'Record status changes' (unchecked), 'Record is assigned' (unchecked), and 'Record fields change' (unchecked). The 'Start when' section has a 'Record is created' checkbox checked. The 'Add Step' button is visible, and the 'Replace String' function is selected. The 'Replace String' function is configured with 'eWorkflow - Strings:Replace' as the 'Text' and 'Set Properties' as the 'Old Value'. The 'New Value' is 'Type a step description here.' and the 'Case Sensitive' option is checked. The status at the bottom is 'Draft'.

Function Call :- Output

Result (String)

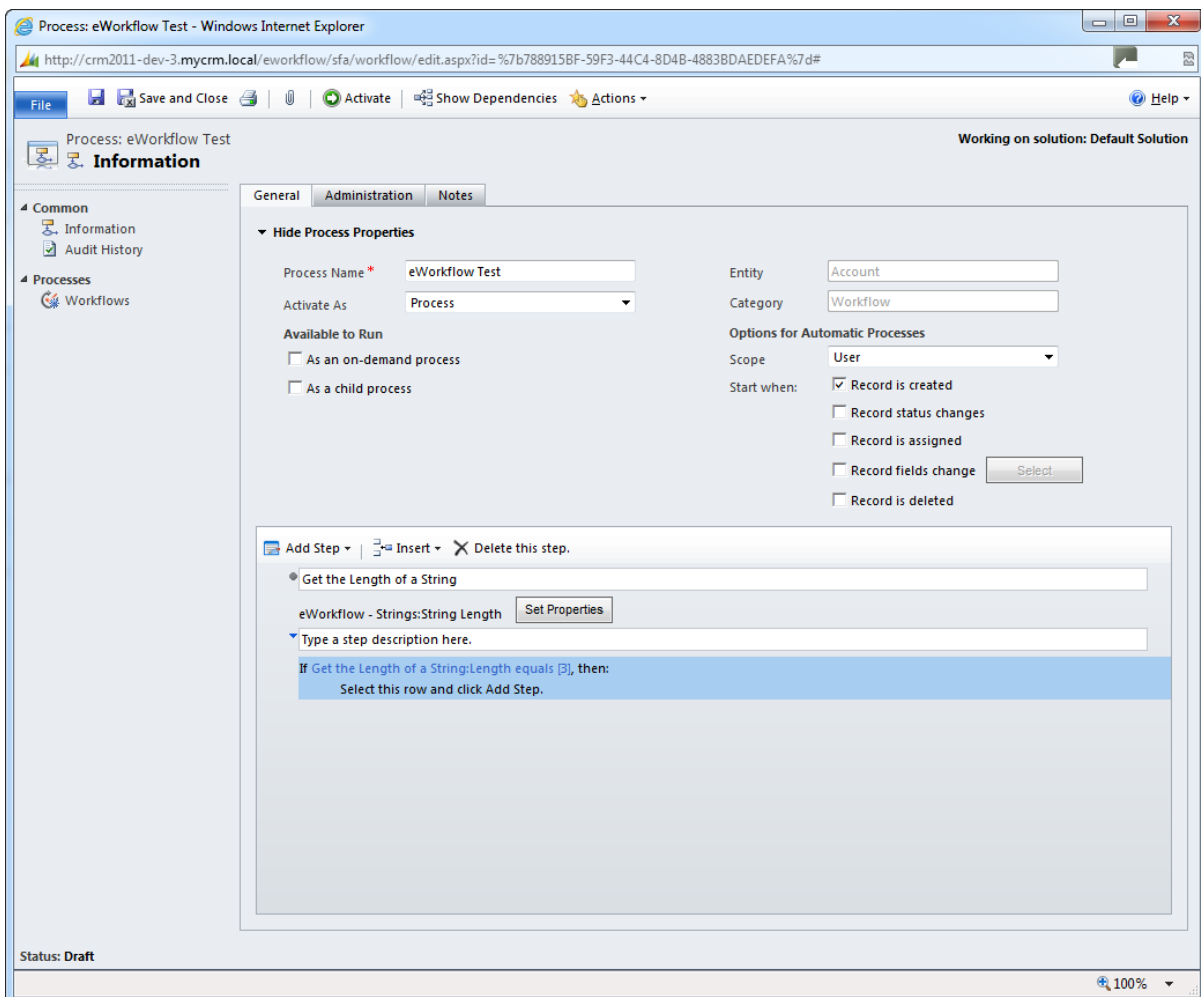
Function –StringLength.

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



The screenshot shows the 'eWorkflow Test' configuration window in Internet Explorer. The 'General' tab is active, displaying various settings for the workflow process. The 'Process Name' is 'eWorkflow Test', and the 'Entity' is 'Account'. The 'Category' is 'Workflow'. Under 'Options for Automatic Processes', the 'Scope' is set to 'User', and the 'Start when' condition is 'Record is created'. The 'Available to Run' section has two unchecked options: 'As an on-demand process' and 'As a child process'. The 'Add Step' section shows a step named 'Get the Length of a String' with a description 'eWorkflow - Strings:String Length'. Below this, a conditional logic rule is defined: 'If Get the Length of a String:Length equals [3], then: Select this row and click Add Step.'

Function Call :- Output

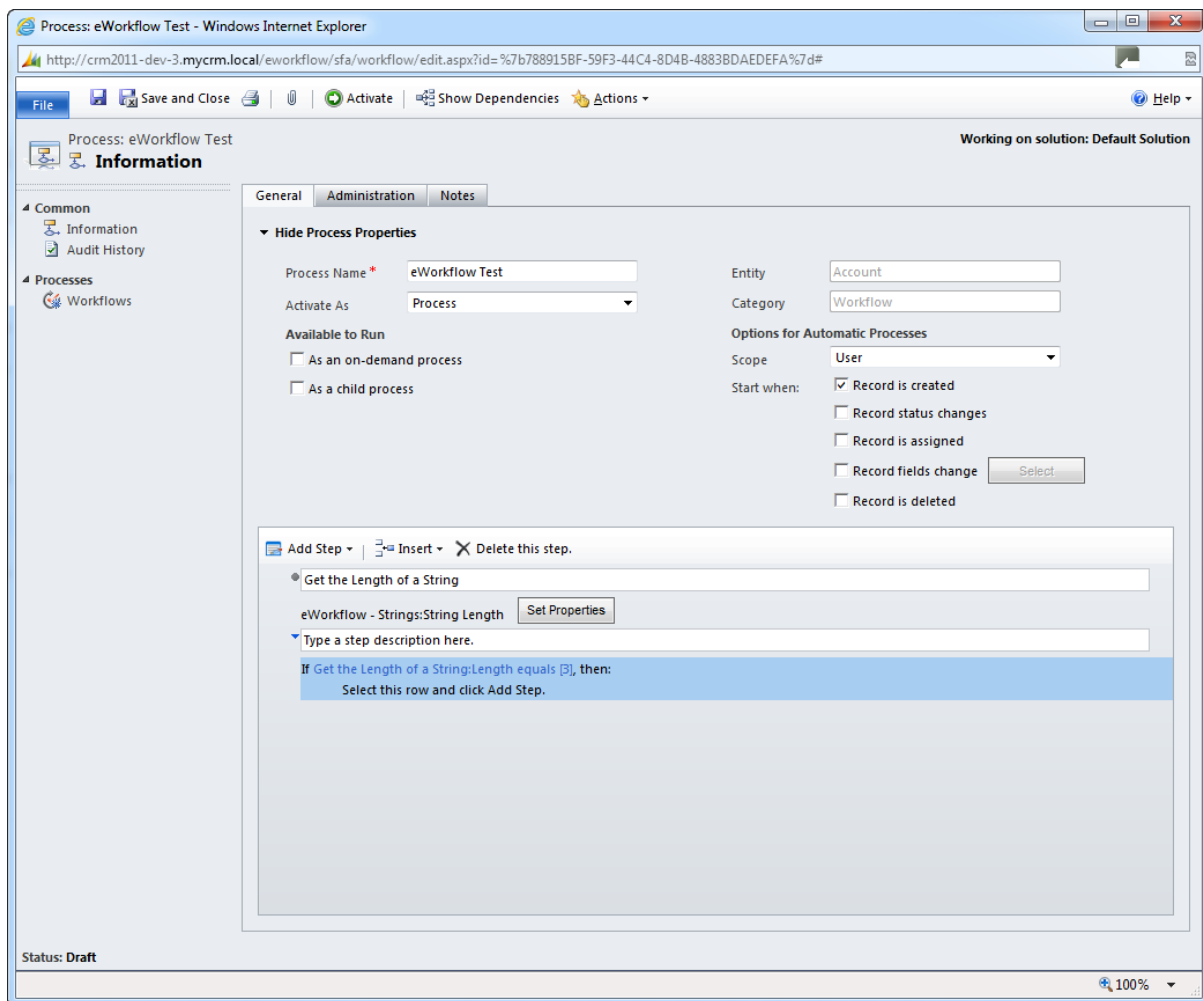
Length (Whole Number)

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

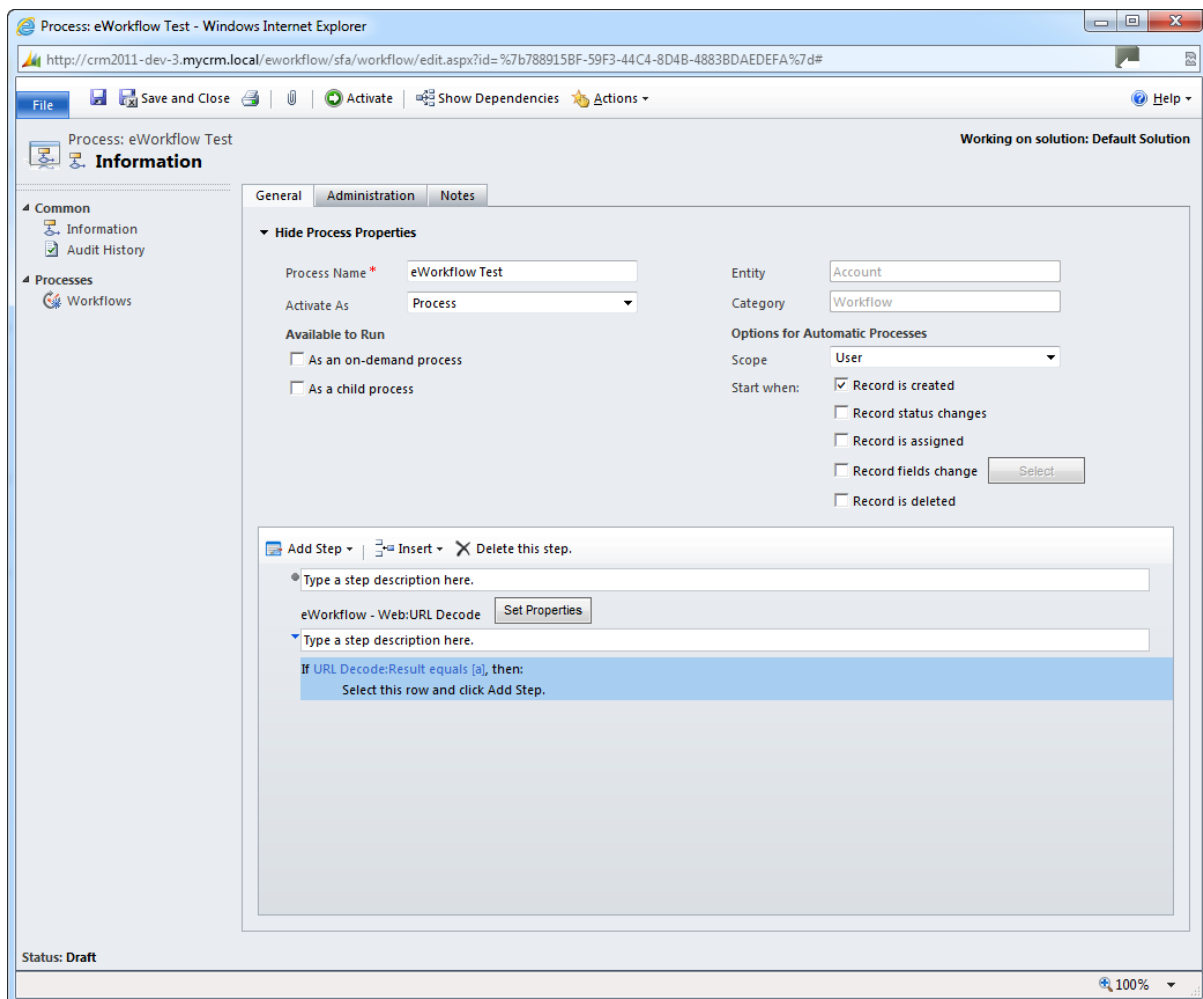
Additional two functions for URL encoding have been included as part of the MyWorkflow Library

Function –WebURLDecode.

Function Call :- Input

Text (String)

Example 29.1



The screenshot shows the 'Process: eWorkflow Test' configuration window in a web browser. The interface includes a menu bar with 'File', 'Save and Close', 'Activate', 'Show Dependencies', and 'Actions'. The main content area is divided into 'General', 'Administration', and 'Notes' tabs. The 'General' tab is active, showing the 'Hide Process Properties' section. This section contains fields for 'Process Name' (eWorkflow Test), 'Entity' (Account), 'Category' (Workflow), and 'Activate As' (Process). There are also checkboxes for 'Available to Run' (As an on-demand process, As a child process) and 'Options for Automatic Processes' (Record is created, Record status changes, Record is assigned, Record fields change, Record is deleted). A 'Set Properties' button is visible. Below the 'Set Properties' button, there is a section for 'Add Step' with a description field and a 'Set Properties' button. The status at the bottom is 'Draft'.

Function Call :- Output

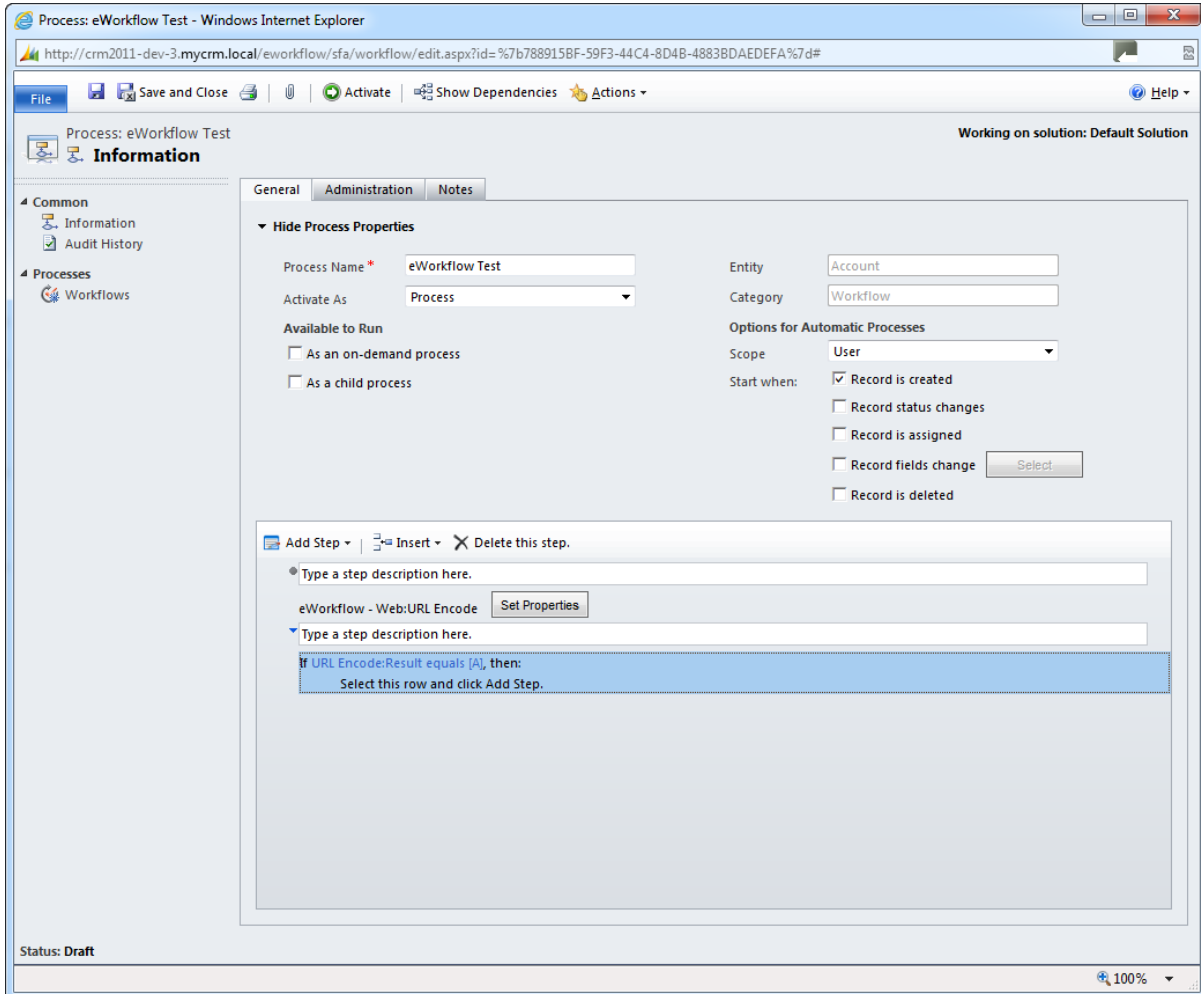
Result (String)

Function –WebURLEncode.

Function Call :- Input

Text (String)

Example 30.1



The screenshot shows the 'eWorkflow Test' process configuration in the MyCRM system. The interface includes a sidebar with 'Common' and 'Processes' sections. The 'Processes' section is expanded, showing 'Workflows'. The main area displays the 'eWorkflow Test' process configuration under the 'General' tab. The configuration includes fields for 'Process Name' (eWorkflow Test), 'Entity' (Account), 'Category' (Workflow), and 'Options for Automatic Processes' (Scope: User, Start when: Record is created). The 'Available to Run' section has checkboxes for 'As an on-demand process' and 'As a child process'. The 'Add Step' section shows a list of steps, including 'eWorkflow - Web:URL Encode' and 'eWorkflow - Web:URL Encode:Result equals [A], then:'. The status is 'Draft'.

Function Call :- Output

Result (String)

MyWorkflow – Sales

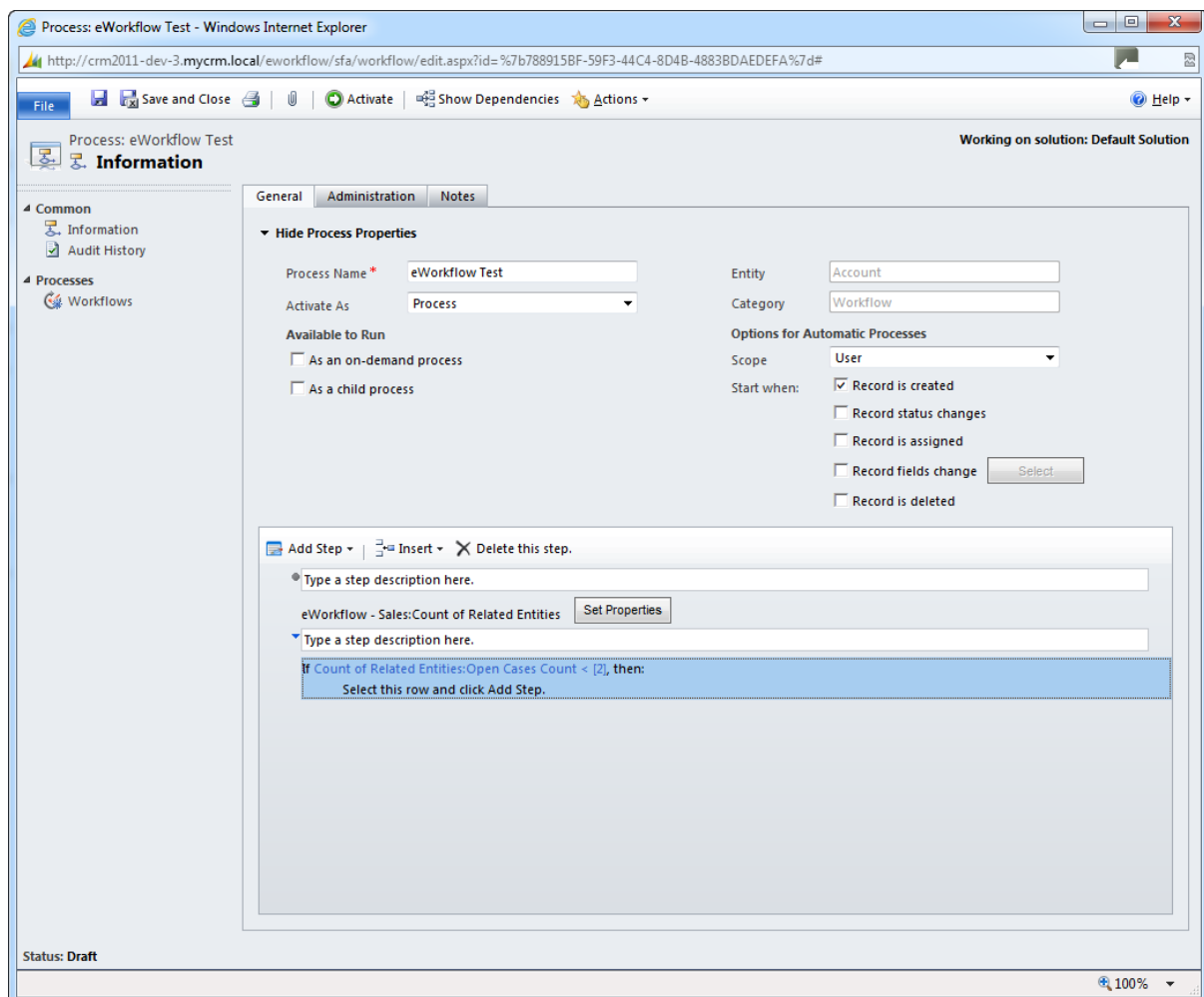
We have created a number of useful and extensible functions that may be useful within Sales and Business workflow, these functions enable counts and totals to be created to help gather analytical data

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



The screenshot shows the 'eWorkflow Test' configuration page in the MyCRM system. The interface includes a sidebar with 'Common' and 'Processes' sections. The main area is divided into 'General', 'Administration', and 'Notes' tabs. The 'General' tab is active, showing the following configuration:

- Process Name:** eWorkflow Test
- Entity:** Account
- Category:** Workflow
- Activate As:** Process
- Options for Automatic Processes:**
 - Scope:** User
 - Start when:**
 - ☒ Record is created
 - ☐ Record status changes
 - ☐ Record is assigned
 - ☐ Record fields change
 - ☐ Record is deleted

Below the configuration fields, there is a section for adding steps. The first step is titled 'eWorkflow - Sales:Count of Related Entities' and has a 'Set Properties' button. The second step is titled 'Count of Related Entities:Open Cases Count < [2], then:' and has a 'Select this row and click Add Step.' button.

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)

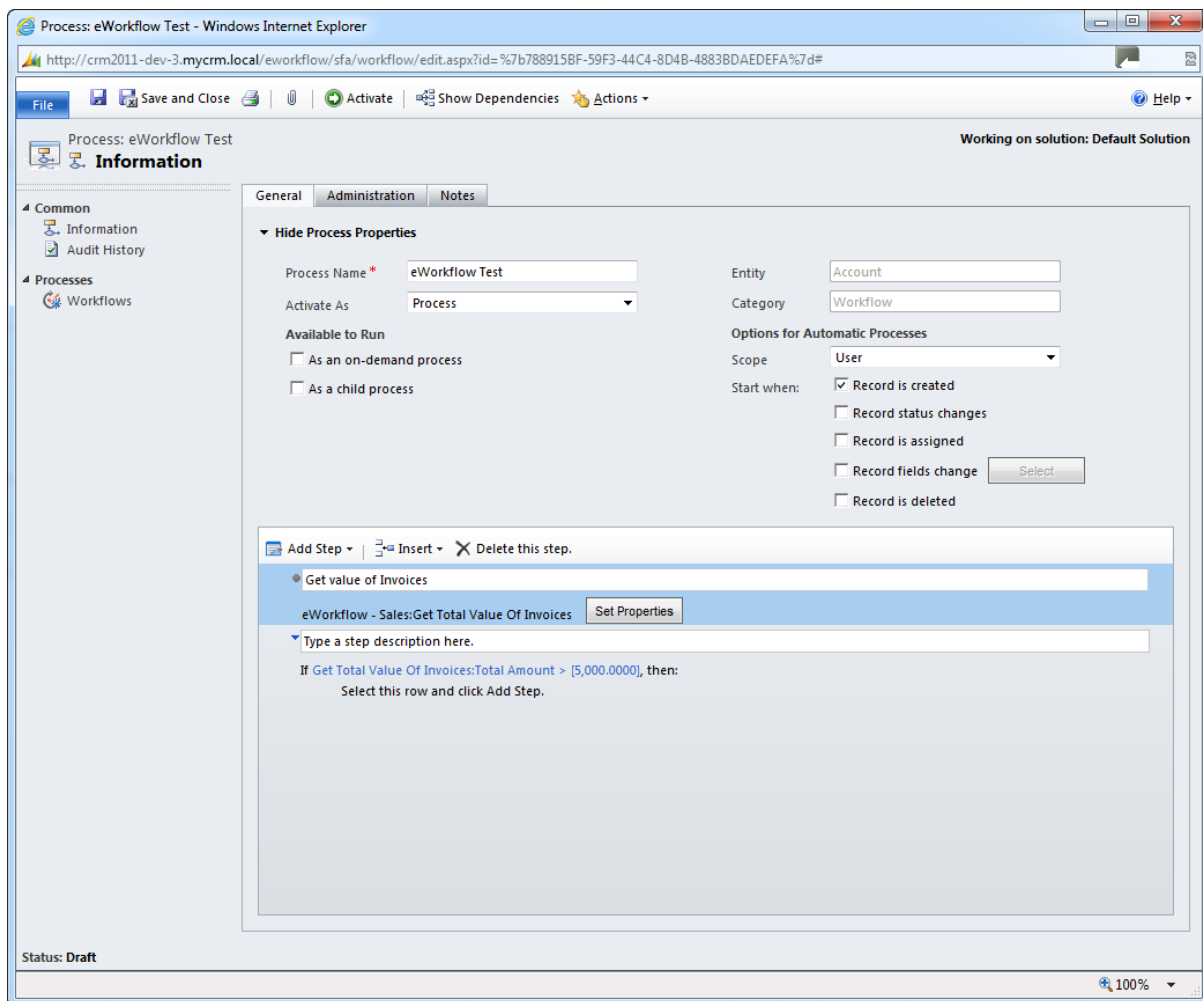
Function – TotalValueOfInvoices

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

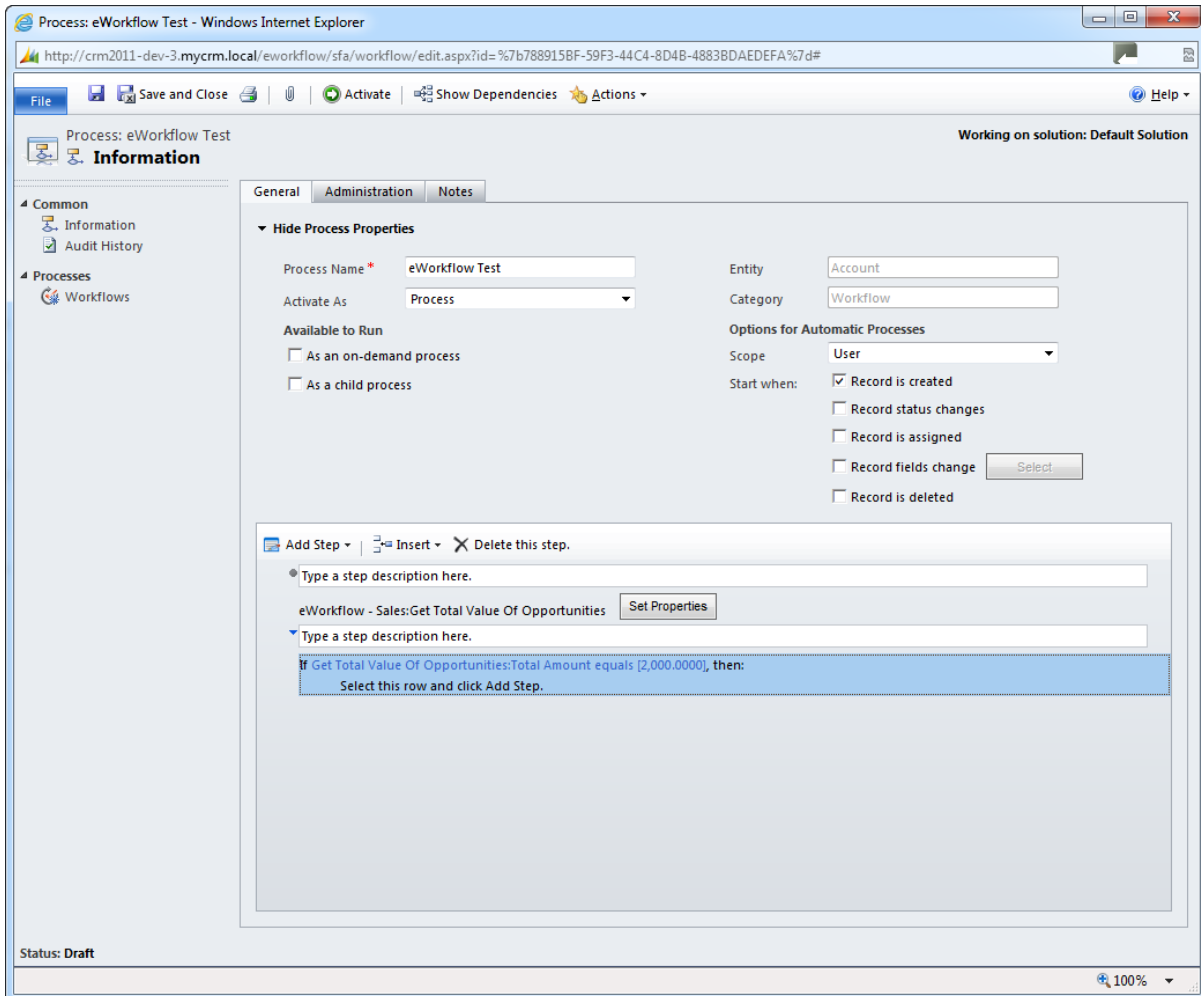
With the Total Opportunity value count, you can now perform workflow actions based on the total value of current Opportunities for a customer, in the example we test to see if an account has reached the £2000 GBP Actual Value

Function Call :- Input

Account (Object)

Contact (Object)

Example 33.1



The screenshot shows the 'eWorkflow Test' configuration page in the MyCRM application. The 'General' tab is active, displaying the following settings:

- Process Name:** eWorkflow Test
- Entity:** Account
- Category:** Workflow
- Activate As:** Process
- Options for Automatic Processes:**
 - Scope: User
 - Start when: ☒ Record is created, ☐ Record status changes, ☐ Record is assigned, ☐ Record fields change, ☐ Record is deleted
- Available to Run:**
 - ☐ As an on-demand process
 - ☐ As a child process

Below the settings, there is a section for adding steps. The first step is 'eWorkflow - Sales: Get Total Value Of Opportunities'. A second step is being added with the condition: 'If Get Total Value Of Opportunities: Total Amount equals [2,000.0000], then: Select this row and click Add Step.'

Function Call :- Output

Total Amount (Money)

Total Estimated Revenue (Money)

Function – TotalValueOfOrders

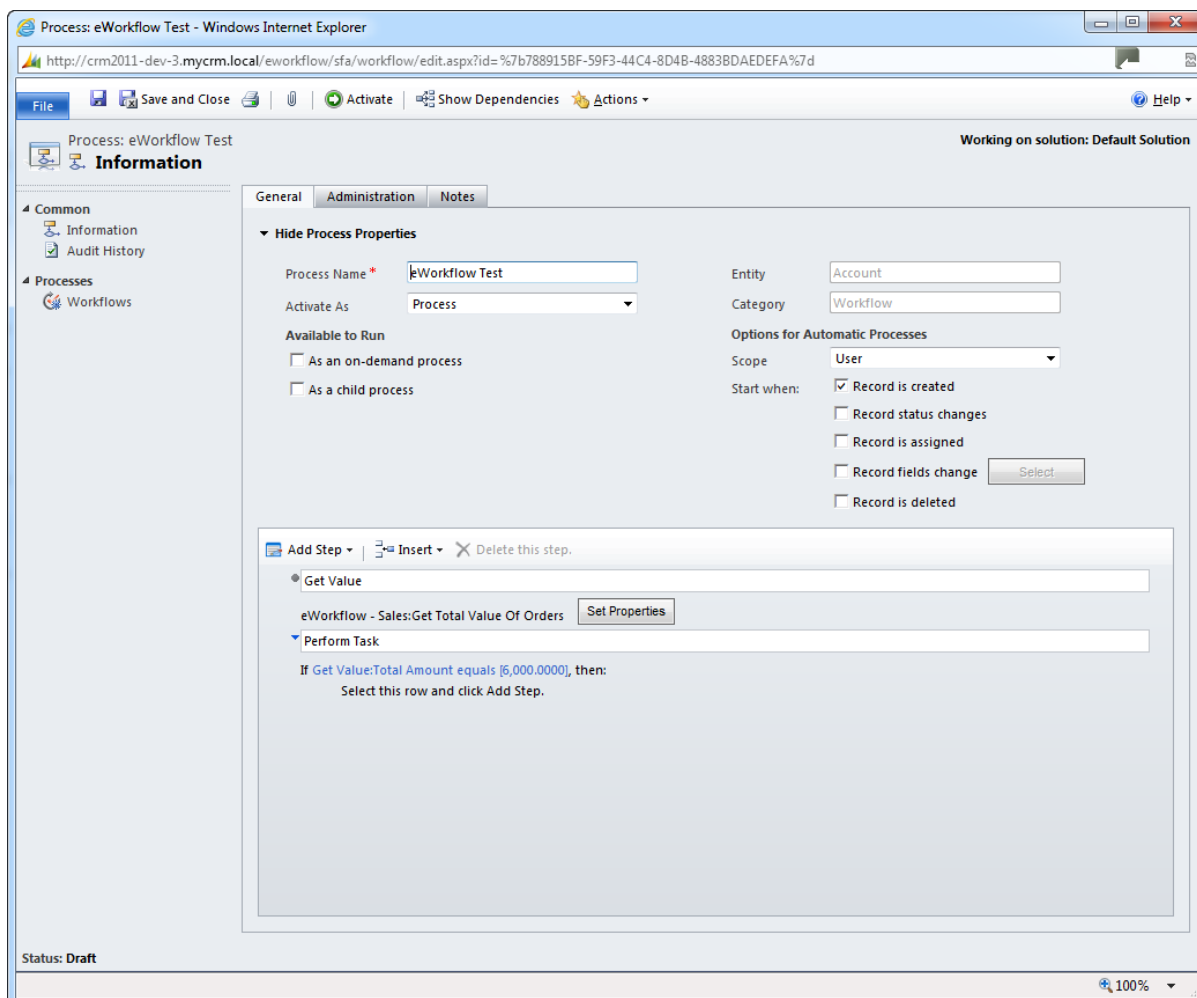
With the Total Order value count, you can now perform workflow actions based on the total value of current Orders for a customer, in the example we test to see if an account has reached the £6000 GBP Value

Function Call :- Input

Account (Object)

Contact (Object)

Example 34.1



Process: eWorkflow Test - Windows Internet Explorer

http://crm2011-dev-3.mycrm.local/eworkflow/sfa/workflow/edit.aspx?id=%7b788915BF-59F3-44C4-8D4B-4883BDAEFA%7d

File Save and Close Activate Show Dependencies Actions Help

Process: eWorkflow Test Working on solution: Default Solution

Information

Common

- Information
- Audit History

Processes

- Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test

Entity Account

Activate As Process

Category Workflow

Available to Run

- ☐ As an on-demand process
- ☐ As a child process

Options for Automatic Processes

Scope User

Start when:

- ☒ Record is created
- ☐ Record status changes
- ☐ Record is assigned
- ☐ Record fields change Select
- ☐ Record is deleted

Add Step Insert Delete this step.

Get Value

eWorkflow - Sales: Get Total Value Of Orders Set Properties

Perform Task

If Get Value: Total Amount equals [6,000.0000], then:

Select this row and click Add Step.

Status: Draft

100%

Function Call :- Output

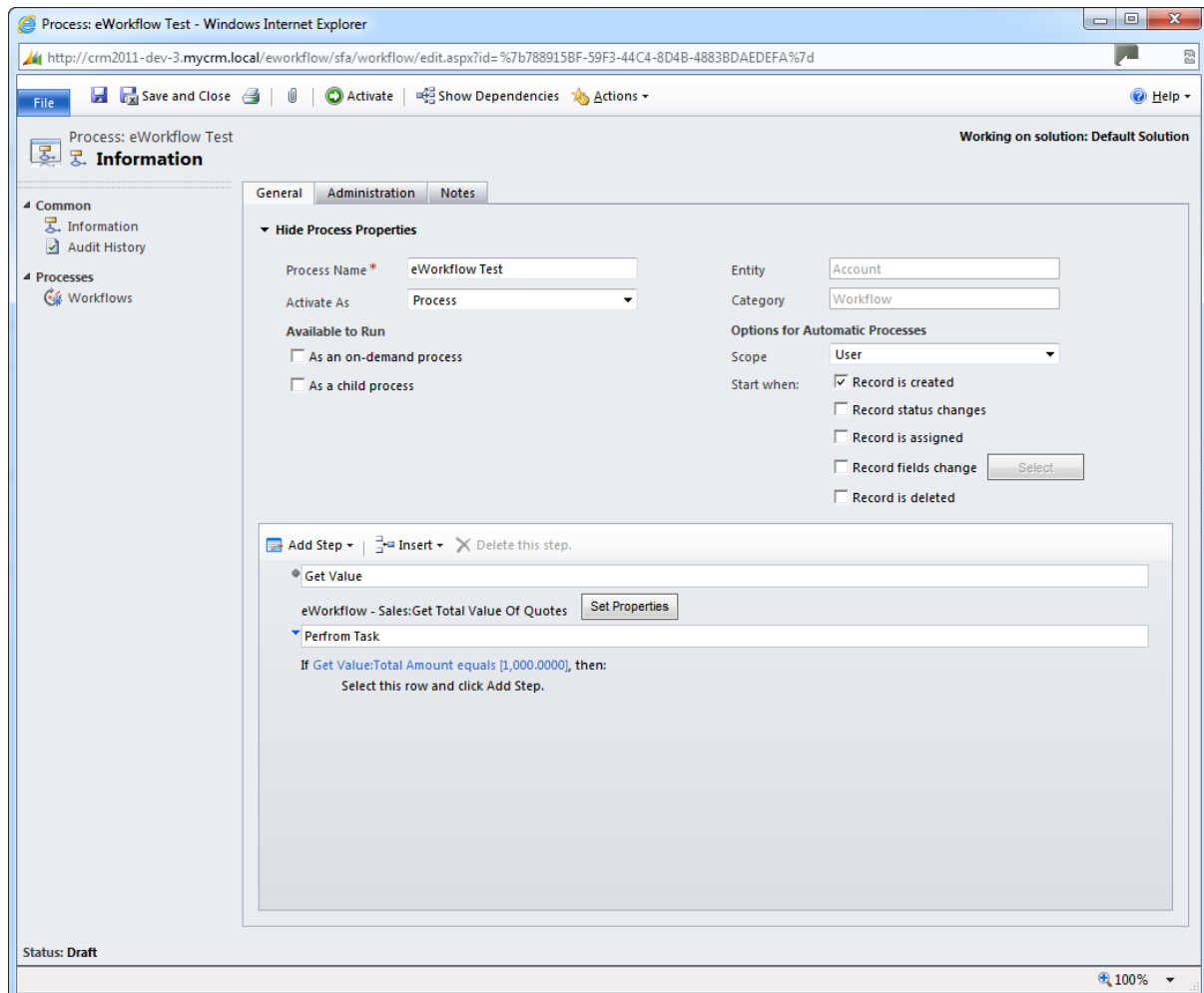
Total Amount (Money)

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



The screenshot shows the 'eWorkflow Test' configuration page in a web browser. The page has a sidebar with 'Common' (Information, Audit History) and 'Processes' (Workflows) sections. The main area is titled 'Process: eWorkflow Test' and 'Working on solution: Default Solution'. It has tabs for 'General', 'Administration', and 'Notes'. The 'General' tab is active, showing 'Hide Process Properties' with fields for 'Process Name' (eWorkflow Test), 'Entity' (Account), 'Category' (Workflow), 'Scope' (User), and 'Start when' (Record is created). Below these are 'Options for Automatic Processes' with checkboxes for 'Record status changes', 'Record is assigned', 'Record fields change', and 'Record is deleted'. A 'Perform Task' section shows a task 'eWorkflow - Sales: Get Total Value Of Quotes' with a 'Set Properties' button. A conditional statement is visible: 'If Get Value: Total Amount equals [1,000.0000], then: Select this row and click Add Step.'

Function Call :- Output
Total Amount (Money)

MyWorkflow – Other

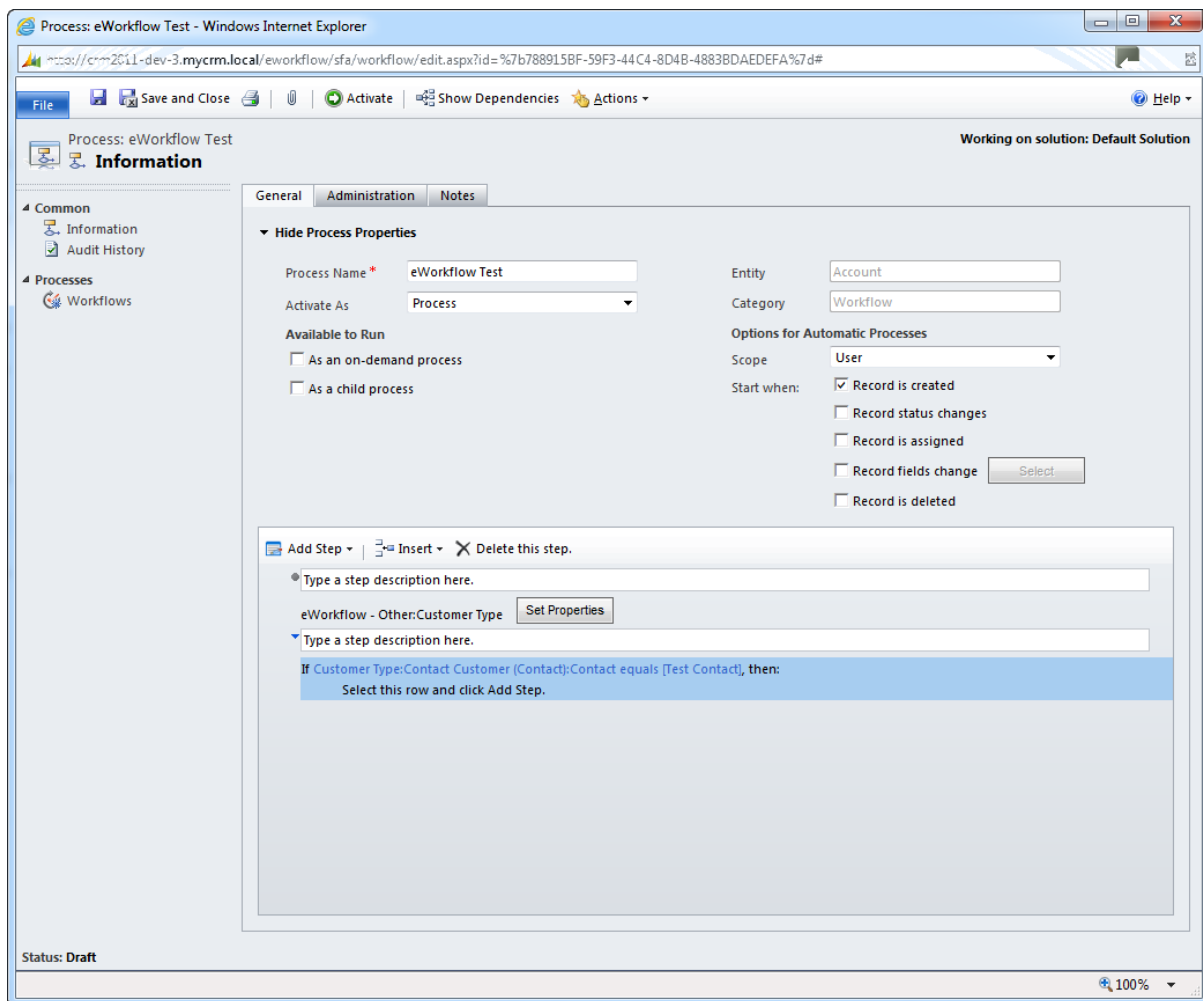
Function – CustomerType

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



Process: eWorkflow Test - Windows Internet Explorer

Process: eWorkflow Test

Working on solution: Default Solution

Information

Common

Information

Audit History

Processes

Workflows

General Administration Notes

Hide Process Properties

Process Name * eWorkflow Test

Entity Account

Activate As Process

Category Workflow

Options for Automatic Processes

Scope User

Start when: ☒ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record fields change

☐ Record is deleted

Add Step Insert Delete this step.

Type a step description here.

eWorkflow - Other:Customer Type

Type a step description here.

If Customer Type:Contact Customer (Contact):Contact equals [Test Contact], then:

Select this row and click Add Step.

Status: Draft

100%

Function Call :- Output

CustomerType:Contact

CustomerType:Account

CustomerType (String)

For Additional Information

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Phone: 01983 245245

Web: www.mycrmgroup.com

