



Workflows

One to Many and Many to One

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INTRODUCTIONS

Hi!

I'M ALLEN ROTH,
Director of Business Applications

Jewish Federation of Cleveland

A member of JFNA - Jewish Federations of North America

Hometown: Cleveland, Ohio

I'm also a Martial Arts Master,
and a Movie Stunt Professional

WHO IS JFNA

- A federation of 151 separate and individual organizations across North America
- The Jewish Federations raise and distribute more than \$3 billion annually
- Touch more Jewish lives than any other organization in the world
- Identifies, supports and addresses the full range of social service issues
- Provides lifesaving humanitarian relief
- Supports programs for all ages all over the world

WHO IS THE JEWISH FEDERATION OF CLEVELAND?

- One of the “large” Federations
- We manage more money than any other Federation, and are the largest grant maker in the state of Ohio
- We support 16 local agencies
- We support a wide variety of activities both in and out of the Jewish Community
- We have a sister city in Israel, one in Russia, and a community we foster in the Cleveland Inner City
- We were the first Federation to make CRM the system of record
- We are a leader within the Federation system

WORKFLOWS AND DESIGN REQUIREMENTS

Pledge Approval Workflow

- Replace and improve the physical process
- Custom workflow not using AppFabric

Constituent Update Workflow

- Improve the quantity and quality of data
- Workflow using AppFabric

Workflow	Entry	Review & Approve	Commit/Batch
Pledge	One	Many	Many
Constituent	One / Many	One	One

*Both require routing to various queues/inboxes depending on data

Functional Demo!

HUMAN BENEFITS OF WORKFLOWS

- More people using CRM
- Users finding CRM fun!
- Improving data quality and quantity
- Facilitating data “Challenges”

HOW DID I...

- Create tabs and action buttons on an add form?
- Configure the common constituent update workflow path?
- Replace contact information?

CREATE TABS AND BUTTONS ON AN ADD FORM

- Available tags within AddDataFormTemplateSpec
- Goes after FormFields and WebUIComponent
- <Tabs>
- <UIFields>
- <UIActions>
- Can be positioned and customized further using the UIModel
- It's worth reading about these in the development guides on bbdevnetwork.com

Code Demo

Tabs on an add form

COMMON WORKFLOW PATH

Get update request

Send receipt notification

Review request

Approve or Reject

Process response

Commit changes or notify requestor

Code Demo

Constituent Update Common Case Workflow

REPLACE CONTACT INFORMATION

- Replace = Add + Edit
- In workflow:
 - First ADD the new record
 - Second EDIT the current record
 - Add an end date
 - Flag it as Do Not Mail, Do Not Email, etc.

Code Demo

Replace contact information

Q & A

