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Revision Log

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| --- | --- | --- | --- |
| Version | Date | Author | Change Description |
| 0.1 | 2019-04-17 | Deanna Beauchamp | Initial Version |
| 0.2 | 2019-05-03 | Luke Thompson | Completed the workflows, business rules and business process flows sections |
| 0.3 | 2019-05-04 | Luke Thompson | Updates to Scripts and workflows sections |
| 1.0 | 2019—05-06 | Deanna Beauchamp | Final revisions for Phase 1 |

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# Plugins

A plug-in is custom business logic (code) that you can integrate with Microsoft Dynamics 365 (online & on-premises) to modify or augment the standard behavior of the platform. Another way to think about plug-ins is that they are handlers for events fired by Microsoft Dynamics 365. You can subscribe, or register, a plug-in to a known set of events to have your code run when the event occurs.

## CreateFinancialLineItemRecords

Description: When a site service is created or updated, the OTC and recurring financial line items (for period up to current date) are created.

Step #1:

Message: Create

Primary Entity: edu\_siteservice

Run in User’s Context: NGN System account

Stage: PostOperation

Mode: Asynchronous

Images: PostImage (edu\_OneTimeChargeTotal, edu\_OneTimeChargeRecoverable, edu\_service, edu\_vendor, edu\_currentprice, edu\_startdate, statecode)

Step #2:

Message: Update

Primary Entity: edu\_siteservice

Filtering Attributes: edu\_service, statecode

Run in User’s Context: NGN System account

Stage: PostOperation

Mode: Asynchronous

Images:

PreImage (edu\_service, edu\_startdate, edu\_currentprice, edu\_recoverablemonthly, edu\_vendor)

PostImage (edu\_OneTimeChargeTotal, edu\_OneTimeChargeRecoverable, edu\_service, edu\_vendor, edu\_currentprice, edu\_startdate, statecode)

# Custom Workflow Activities

Custom Workflow Activities (CWAs) are the custom CRM activity steps i.e. technically a .net assembly which are being used as a step in CRM workflows & activities to achieve some business task which can be done using simple CRM workflow options.

## CalculateNumberOfBusinessDays

Returns the number of business days between two dates. Weekends and holidays per the passed in holiday schedule are ignored.

Input #1:

Name: Start Date

Value: The date to start counting from

Input #2:

Name: End Date

Value: The date at which to stop counting

Input #3:

Name: Holiday/Closure Calendar

Value: Reference to a calendar record containing the days to skip

Output #1:

Name: Number of Days

Value: The number of days between the two dates

## CalculateTargetSLA

Returns the SLA date by adding a provided number of business days to the provided start date. Weekends and holidays per the passed in holiday schedule are ignored.

Input #1:

Name: Start Date

Value: The date to start counting from

Input #2:

Name: Number of Days

Value: The number of days between the two dates

Input #3:

Name: Holiday/Closure Calendar

Value: Reference to a calendar record containing the days to skip

Output #1:

Name: Target Date

Value: The SLA target date

## CreateFinancialMonthlySummariesForVendor

Get all the associated financial categories for a vendor and create a financial summary record for them for the previous month. Then change the next invoice date field on vendor to the next month.

Input #1:

Name: Vendor

Value: Reference to account record

## CreateMonthlyFinancialListItemRecords

Get all site services for the vendor and financial category on the referenced edu\_monthlysummary record and create financial line items for them and associate them to the edu\_monthlysummary record. Also find any mid-month OTC or recurring financial line item records without a summary record and associate those too.

Input #1:

Name: Monthly Summary

Value: Reference to edu\_financialmonthlysummary record

## FindAndReturnFujitsuCase

Used when a Fujitsu Case is imported via the import tool, this is called to search for a case with the HEAT ID from the Fujitsu helpdesk, and will return a lookup to a found case.

Input #1:

Name: Heat ID

Value: The Heat ID of the Fujitsu Case to find

Output #1:

Name: Case Reference

Value: Reference to a found case record

Output #2:

Name: Found Case?

Value: a Boolean which is true if a case was found

## GetRecommendedServiceFromModel

Looks up and returns the recommended service from the service model using information on the site record including site type and enrolment numbers.

Input #1:

Name: Site

Value: Reference to edu\_site record

Output #1:

Name: Recommended Service

Value: Reference to edu\_service record

## SetAsCurrentPrice

This is called when a future service price record becomes effective. It will change the status to active, set the current price on the service and deactivate any current service price records for the service.

Input #1:

Name: ServicePrice

Value: Reference to edu\_serviceprice record

## UpdateRelatedSiteServicePrice

This is called when a service’s current price is updated. It will update all site services that have that product and set their current price to the new value.

Input #1:

Name: Service

Value: Reference to edu\_service record

# Web Resources

## Scripts

### Common\Edu.Common.js

Commonly used functions including reading lookup fields, removing curly brackets, validating phone numbers, checking if a text field is blank.

### FormHandler\Case.Form.js

Edu.filterSDContacts – filters the customer lookup to only show contacts related to the selected school district.

Edu.hideShowPSIrequestTab – shows the TELUS PSI tab, if the subcategory is New Service.

Edu.RetrieveServiceCost - retrieves the service cost on a Case from the Service and enter it to monthly cost.

Edu.hideShowCaseSection – shows the relevant sections depending on the case type.

### FormHandler\Contact.Form.js

Edu.filterParentCustomer – filters the parent customer lookup to only show accounts.

Edu.ShowHideContactRoles – shows the contact roles if the contact is for a school district, otherwise hide.

### FormHander\edu\_Order.Form.js

Edu.OrderTypeFieldLogic - Manages the required level of the form's field depending on the order Type selected.

### FormHandler\edu\_SiteService.Form.js

Edu.ShowHideVendorTypeSection – shows the Telus or AV section depending on vendor type and hides the other section.

# Business Rules

## Case

### Case - Case Created Date Logic

**Description**

Sets the value of the Case Created Date to that of the created on - on save.

**Scope**

Entity

**Logic**

IF

**Case Created Date** does not contain data

THEN

Set default value of **Case Created Date** to **Unused - Created On**

### Case - Category logic

**Description**

Logic to control the clearing of the subcategories and categories on Case.

**Scope**

Form – Case Main

**Logic**

IF

**Category** does not contain data

THEN

Clear **Subcategory**

ELSE IF

**Category** equals **"Service Call"** AND **Case Type** does not equal **"Service Request"**

THEN

Clear **Category**

### Case Type - Form Logic.

**Description**

Auto Set service request category, and show/hide correct priority, depending if the type is service request.

**Scope**

Form – Case Main

**Logic**

IF

**Case Type** equals **"Incident"**

THEN

Hide field **Priority**

Show field **Incident Priority**

Show field **HEAT ID**

ELSE IF

**Case Type** equals **"Service Request"**

THEN

Show field **Priority**

Hide field **Incident Priority**

Hide field **HEAT ID**

Set **Category** to **"Service Call"**

## Contact

### Show or hide company & school district

**Description**

If the contact is a school district contact, make school district mandatory and hide company, otherwise make company mandatory and hide school district.

**Scope**

Form – NGN Contact

**Logic**

IF

**Type** equals **"Vendor Contact"**

THEN

Show field **Company**

Hide field **School District**

Set **Company** as **Business Required**

Set **School District** as **Not Business Required**

ELSE IF

**Type** equals **"School District Contact"**

THEN

Hide field **Company**

Show field **School District**

Set **School District** as **Business Required**

Set **Company** as **Not Business Required**

## Order

### Lock / unlock install date

**Description**

lock unlock install date based on approval date.

**Scope**

Form – Order Form

**Logic**

IF

**Approval Date** does not contain data

THEN

Lock **Actual Install Date**

ELSE

Unlock **Actual Install Date**

## Site

### Is a child site

**Description**

Determine if record is a child site and flag as such

**Scope**

Entity

**Logic**

IF

**Parent Site** contains data

THEN

Set **Is Child Site?** to **"Yes"**

ELSE

Set **Is Child Site?** to **"No"**

### Is a parent site

**Description**

Process to determine if the record is a parent site and flag it as such

**Scope**

Entity

**Logic**

IF

**Number of Child Sites** greater than **0**

THEN

Set **Is Parent Site?** to **"Yes"**

ELSE

Set **Is Parent Site?** to **"No"**

# Business Process Flows

## Case Flow

This Business Process flow is the default process on a Case - It contains the stages and steps to guide users through NGN's Service and Incident Case Process.

*Incident* Case Stages:

**Review** > **Investigation** > **Close Case**

*Service* Case Stages:

***Review*** > ***Check Model*** > **PSI Request** (if new service) > **AV Request** (if AV) > **SD Approval** > **Close Case**

## Order Flow

This Business Process flow is the default process on Order - It contains the stages and steps to guide users through NGN's Order Process.

Stages:

***Confirmation*** > ***Vendor Order***> ***Budget Sign-Off***> ***Awaiting Installation Date***> ***Installed***

# Workflows

This section contains the workflows in the system, split between

## Case

### Create Order From Case

**Description**:  
This workflow is run from the business process flow, and creates an order from the case.

It has some initial error checking, then it creates the order, and updates the case: created order.

**Trigger**:   
On Demand – When the Business Process Flow ‘button’ is clicked

**Logic**:

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| |  | | --- | | **Stage 1 - Error Checking** | | |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **If the Order is already created** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Case:Created Order contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Error - The Order has already created. Please Navigate to, the Created Order.** | | Stop workflow with status of:  Canceled  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?id=%7bB019646E-E2D0-4F40-8AF5-5DA6C54988DA%7d) | | | | | | | |

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|  | |  | | --- | | **Stage 2 - Create Order** | | |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Create Order** | | Create:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?id=%7bB019646E-E2D0-4F40-8AF5-5DA6C54988DA%7d) | | | |

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|  | |  | | --- | | **Stage 3 - Update Case** | | |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the Case - Created Order** | | Update:  Case  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?id=%7bB019646E-E2D0-4F40-8AF5-5DA6C54988DA%7d) | | | |

### Case SLA - PSI Request - Wait For Target Date

**Description**:

This workflow handles the setting of the Exception flag depending on the target date.

**Trigger**:   
On Change of ‘PSI Results Target Date’

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that a flag already exists** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Case:PSI SLA Exception Flag equals [Yes], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Clear Flag** | | Update:  Case  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bEE56A655-E868-41EB-84EA-5DE1B675170B%7d) | | | | | |

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|  | |  | | --- | | **Check that there is a returned date** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Case:PSI Results Target Date contains data, then:   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **wait until that date** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Timeout until Case:PSI Results Target Date then   |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **if there is no returned date** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Case:PSI Results Returned Date does not contain data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **set flag to missed** | | Update:  Case  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bEE56A655-E868-41EB-84EA-5DE1B675170B%7d) | | | | | | | | | | | | | |

### Case SLA - PSI Request - Calculate Business Days

**Description**:  
Used for the SLA for Case to Calculate the Business Days between PSI Requested Date and PSI Results Returned Date

**Trigger**:   
On Create and On Change of PSI Requested Date & PSI Results Returned Date

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that - PSI Requested Date, PSI Results Returned Date fields contain data.** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Case:PSI Requested Date contains data AND Case:PSI Results Returned Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **User the CWA and get the No. of business days with the CALENDAR between the PSI REQUESTED DATE and PSI RETURNED DATE** | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.CalculateNumberOfBusinessDays  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b961D827B-2CC0-409C-8BD5-88D4B1C32714%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update Case - PSI Number of days** | | Update:  Case  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b961D827B-2CC0-409C-8BD5-88D4B1C32714%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Case:PSI Returned Days contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Clear PSI Number of days** | | Update:  Case  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b961D827B-2CC0-409C-8BD5-88D4B1C32714%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Stop workflow - No Action Required** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b961D827B-2CC0-409C-8BD5-88D4B1C32714%7d) | | | | | |

### Case SLA - PSI Request - Calculate Target Date

**Description**:

Used to Calculate the Target PSI Returned Date which is used in the SLA Calculations

Triggers a Custom Workflow Activity with the following inputs:

SLA days, Calendar, Start Date (PSI Request Date).

Sets the Target SLA Date

**Trigger**:

When PSI Letter Sent date is entered/changed

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **if Requested date contains data** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Case:PSI Requested Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **User the CWA and get the business days with the START DATE the CALENDAR and the AGREED SLA TARGET DAYS(10)** | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.CalculateTargetSLADate  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b64D2D632-A226-415A-8AA0-C11B29AC6B79%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Set Target Date** | | Update:  Case  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b64D2D632-A226-415A-8AA0-C11B29AC6B79%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Case:PSI Results Target Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Clear Target Date** | | Update:  Case  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b64D2D632-A226-415A-8AA0-C11B29AC6B79%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Stop workflow - No Action Required** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b64D2D632-A226-415A-8AA0-C11B29AC6B79%7d) | | | | | |

### Create PSI Email

**Description**:  
The Email creation workflow including a Template used when requesting a New service from TELUS

**Trigger**:

The button click on demand on the Case Flow

**Logic**:

|  |
| --- |
| **Create PSI Email** |
| Create:  Email  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b7E17FF5A-43C7-472E-B93B-C4FEF9EB59B2%7d) |

**Template details:**

Dear TELUS,

Pleas find below the details for the PSI Request.

Please can you confirm if TELUS can fulfill the request, and if so, the financial implications.

**Site Details**

Site Name:   {Name(Related Site (Site))}

Site Address:  {Site Address Line 1(Related Site (Site))}

Site City:  {Site Address City(Related Site (Site))}

Site Postcode:   {Site Address Postal Code(Related Site (Site))}

**Site Contact Details**

Contact Name:  {Case Contact(Case)}

Contact Email:  {Email(Case Contact (Contact))}

Contact Phone:  {Business Phone(Case Contact (Contact))}

**Service Details**

Service Requested:  {Requested Service(Case)}

Kind regards,

{Owner(Case)}

Next Generation Networks - Ministry of Education

## Case Flow (Business Process Flow)

### Set Current Process Stage for Case

**Description**:

Sets the Business Process Stage for the Case from the business process flow 's active stage. This is used in views and reporting.

**Trigger**:

On Application of Business Process Flow

On Change of Stage

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  | | --- | | **Check if Active or Finished** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Case Flow:Status Reason in [Active;Finished], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | Update:  Incident (Case) | | | | | |

### If Fujitsu Case - Close Automatically and Set stage.

**Description**:

This workflow sets the business process flow to aborted if it detected to be a Fujitsu case.

**Trigger**:

On Application of Business Process Flow

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **If the Case Type is Fujistsu** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Incident (Case):Case Type equals [Fujitsu Ticket], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Set the Case Flow Process to the Last stage** | | Update:  Case Flow  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b1CD16CA9-886A-49AF-8BD9-C784A9DF8487%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Abort flow - it is a Fujitsu Case** | | Change record status to:  Case Flow  Aborted | | | | | |

## Company

### Create Financial Monthly Summary Records

**Description**:

This process runs on Vendor. It waits for a month, and then calls a Custom Workflow Activity to create the Financial Monthly Summary records for the Vendor's Financial Categories. It then calls itself.

**Trigger**:

On Demand

As a Child Process

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **If record is no longer active** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Company:Status equals [Inactive], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **exit workflow** | | Stop workflow with status of:  Canceled  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b0CF7DF57-A05A-4118-8196-54DD0D670BBB%7d) | | | | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | |  |  | | |  | | --- | | **Otherwise, create financial summary records** | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.CreateFinancialMonthlySummariesForVendor  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b0CF7DF57-A05A-4118-8196-54DD0D670BBB%7d) | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | |  |  | | |  | | --- | | **Update last invoice date and next invoice date** | | Update:  Company  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b0CF7DF57-A05A-4118-8196-54DD0D670BBB%7d) | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Wait until next invoice date** | | |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Timeout until Company:Next Invoice Date then   |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | |  |  |  |  | | --- | --- | --- | --- | | Start child workflow: | Company |  | [Create Financial Monthly Summary Records](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b0CF7DF57-A05A-4118-8196-54DD0D670BBB%7d) | | | | | | |

## Financial Monthly Summary

### Create Monthly Financial Line Items

**Description**:

Create the financial line item records for a Vendor and Category.

**Trigger**:

Record is created

**Logic**:

Run CWA:  
NGN.CustomWorkflowActivities (1.0.0.0):NGN.CreateMonthlyFinancialLineItemRecords

## Fujitsu Case Import

### Updates/Creates Fujitsu imported case

**Description**:

A workflow which either creates or updates cases from the Fujitsu import

**Trigger**:

Record is created

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **check that there is a case id (heat) in the incident column** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Fujitsu Case Import:Incident contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Run the CWA to find/return a case with the HEAT ID** | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.FindAndReturnFujitsuCase  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **error - no heat id on the import!** | | Stop workflow with status of:  Canceled  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **if a case is found, and it is active** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Run the CWA to find/return a case with the HEAT ID:Case Found? equals [True] AND Run the CWA to find/return a case with  the HEAT ID:Output\_CaseRef (Case):Status equals [Active], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **update found case** | | Update:  Run the CWA to find/return a case with the HEAT ID:Output\_CaseRef (Case)  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **set case lookup on import record** | | Update:  Fujitsu Case Import  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **if there is a close date - complete the case** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Fujitsu Case Import:Closed Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **close the case** | | Change record status to:  Run the CWA to find/return a case with the HEAT ID:Output\_CaseRef (Case)  Closed by Fujistsu | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **change import record status** | | Change record status to:  Fujitsu Case Import  Case Updated - Closed | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **workflow completed** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **change import record status** | | Change record status to:  Fujitsu Case Import  Case Created - Open | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **workflow completed** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | | | | | | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Run the CWA to find/return a case with the HEAT ID:Case Found? equals [True] AND Run the CWA to find/return  a case with the HEAT ID:Output\_CaseRef (Case):Status in [Cancelled;Resolved], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **set case lookup on import record** | | Update:  Fujitsu Case Import  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **change import record status** | | Change record status to:  Fujitsu Case Import  No Action Required - Case Inactive | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **no action needed - case already inactive closed** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **create a new case** | | Create:  Case  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **update import record case lookup** | | Update:  Fujitsu Case Import  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **if there is a close date - complete the case** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Fujitsu Case Import:Closed Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **close the created case** | | Change record status to:  create a new case (Case)  Closed by Fujistsu | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **change import record status** | | Change record status to:  Fujitsu Case Import  Case Created - Closed | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **workflow completed** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **change import record status** | | Change record status to:  Fujitsu Case Import  Case Created - Open | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b13746118-4FE0-41BF-86C3-E301F3AAF354%7d) | | | | | | | | | |

## Order

### Order SLA - Progress Letter - Wait For Target Date

**Description**:

This workflow handles the setting of the Exception flag depending on the target date.

**Trigger**:

On Change of Target Date

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that a flag already exists** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Order:SLA Progress Exception Flag equals [Yes], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Clear Flag** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bA958F7E9-5209-44FC-A456-372EDD94AB83%7d) | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that there is a target date** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Order:Target Progress Letter Date contains data, then:   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **wait until that date.** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Timeout until Order:Target Install Date then   |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **check that the sla end date does not contain data** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Order:In Progress Letter Sent Date does not contain data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **set exception flag to yes** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bA958F7E9-5209-44FC-A456-372EDD94AB83%7d) | | | | | | | | | | | | | |

### Create Revised Date History Note

**Description**:

Creates a Note when there is a Revised Installation date changed or entered.

**Trigger**:

On change of Revised Installation Date

**Logic**:

|  |
| --- |
| **Create note** |
| Create:  Note  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b850246CA-F932-4EEF-AB8E-4FE4CF6BD3B2%7d) |

**Title: Revised Install Date Log**  
Original Estimated Date: {Estimated Install/Scheduled Date(Order)}  
Revised Date: {Revised Scheduled Date(Order)}   
Reason: {Reason for Revised Date(Order)}   
Notes: {Revised Date Notes(Order)}

**Regarding: Order**

### Order SLA - Install - Wait For Target Date

**Description**:

Workflow to set the exception flag for the Install Date SLA.

If the Target date is reached, this updates the exception flag.

**Trigger**:

On change of Target Install Date

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that a flag already exists** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Order:SLA Install Exception Flag equals [Yes], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Clear Flag** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b2F356C0F-D168-4A0D-A566-51D1164C0DC6%7d) | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that there is a sla target date** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Order:Target Install Date contains data, then:   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **wait until sla target date** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Timeout until Order:Target Install Date then   |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **If sla end field doesn't contain data** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Order:Actual Install Date does not contain data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **set sla exception flag** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b2F356C0F-D168-4A0D-A566-51D1164C0DC6%7d) | | | | | | | | | | | | | |

### Order SLA - In Progress Letter Sent - SLA Business Days

**Description**:

Used for the SLA for Orders to Calculate the Business Days between Approval Date and In Progress Letter Sent Date

**Trigger**:

On Change of Approval Date

On Change of In Progress Letter Sent Date

**Logic:**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that Approval Date & In Progress Letter Sent Date both have dates, then run the CWA.** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Order:Approval Date contains data AND Order:In Progress Letter Sent Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Calc #Business Days from APPROVAL DATE to IN PROGRESS LETTER SENT DATE with respect to the CALENDAR** | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.CalculateNumberOfBusinessDays  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b1214FB2A-67FE-437E-A9BC-64BF1567C4B9%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the Order with the total number of business days between the two dates.** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b1214FB2A-67FE-437E-A9BC-64BF1567C4B9%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Order:TELUS Progress Letter SLA Days contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Clear In Progress Letter SLA Days** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b1214FB2A-67FE-437E-A9BC-64BF1567C4B9%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Stop Workflow - No Action Required** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b1214FB2A-67FE-437E-A9BC-64BF1567C4B9%7d) | | | | | |

### Order SLA - Install Date - Calculate Business Days

**Description**:

Used for the SLA for Orders to Calculate the Business Days between Approval Date and Install Date.

**Trigger**:

On Create

On Change of Actual Install Date

On Change of Approval Date

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that Approval Date & Install Date both have dates, then run the CWA.** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Order:Approval Date contains data AND Order:Actual Install Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **CWA calcs #Business Days from APPROVAL DATE to INSTALL DATE with respect to the CALENDAR** | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.CalculateNumberOfBusinessDays  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bFDAF5F79-72DD-4D99-96F5-752996CCA281%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the Order with the total number of business days between the two dates.** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bFDAF5F79-72DD-4D99-96F5-752996CCA281%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Order:TELUS Install SLA Days contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Clear fields** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bFDAF5F79-72DD-4D99-96F5-752996CCA281%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Stop Workflow - Not Required** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bFDAF5F79-72DD-4D99-96F5-752996CCA281%7d) | | | | | |

### Order SLA - Install Date - Calculate Target Date

**Description**:

Triggers a Custom Workflow Activity with the following inputs:

SLA days, Calendar, Start Date (Approval Date).

Calculates and sets the Target SLA Date: 'Target Install Date'.

**Trigger**:

On change of Approval Date

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that the Approval Date contains data** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Order:Approval Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **CWA and get the TARGET DATE with the START DATE the CALENDAR and the AGREED SLA TARGET DAYS(45)** | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.CalculateTargetSLADate  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b2FB0430C-C248-41DE-98B2-752C5BB3862F%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the Target Install Date Field** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b2FB0430C-C248-41DE-98B2-752C5BB3862F%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Order:Target Install Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Clear Target Install Date Field** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b2FB0430C-C248-41DE-98B2-752C5BB3862F%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **No Action Required - Stop workflow** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b2FB0430C-C248-41DE-98B2-752C5BB3862F%7d) | | | | | |

### Order SLA - In Progress Letter Sent - Calculate Target Date

**Description**:

Triggers a Custom Workflow Activity with the following inputs:

SLA days, Calendar, Start Date (Approval Date).

Sets the Target SLA Date for 'Target In Progress Letter Date'.

**Trigger**:

On Create  
On change of Approval Date

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Check that the Approval Date contains data** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Order:Approval Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.CalculateTargetSLADate  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bD1576FFF-1947-430A-8287-7DEA211502F0%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the Target In Progress Letter Sent Field** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bD1576FFF-1947-430A-8287-7DEA211502F0%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Order:Target Progress Letter Date contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Clear the Target In Progress Letter Sent Field** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bD1576FFF-1947-430A-8287-7DEA211502F0%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **No Action Required - Stop workflow** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bD1576FFF-1947-430A-8287-7DEA211502F0%7d) | | | | | |

### Budget Approval Notification

**Description**:

Creates a Budgeting approval task on the Order

**Trigger**:

On the Order Business Process when the Order moves into the Approval Stage

**Logic**:

|  |
| --- |
| **Create Task** |
| Create:  Task  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bA9A40EB2-BEA5-49EF-8EA6-A80679DB6879%7d) |

### Order - Timeout until Actual Install Date

**Description**:

Timeout until Actual Install Date, Fire child wf to create or edit site service

**Trigger**:

Record is created  
Change of Actual Install Date

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **check for actual install date** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Order:Actual Install Date does not contain data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **stop wf** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b15B449EC-3679-44EF-B8CE-B3E7709556B5%7d) | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Timeout until actual install Date** | | |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Timeout until Order:Actual Install Date then   |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Fire child wf to create or edit site service** | | |  |  |  |  | | --- | --- | --- | --- | | Start child workflow: | Order |  | [Order: [Update/Create] Site Service](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b15B449EC-3679-44EF-B8CE-B3E7709556B5%7d) | | | | | | |

### Order: [Update/Create] Site Service

**Description**:

Workflow to Action the Automatic Edits to the Site Service.

Depending on Order Type - Create, Update, or Close the Regarding or New Service

**Trigger**:

As a Child workflow of *5.3.9.Order - Timeout until Actual Install Date WF*

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Stage 1 - Exit workflow if conditions are not met (Error Checking)** | | |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **Check that the wf hasn't already run (if the workflow has already been run, the below field will be populated)** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Order:Site Service Edited/Updated contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Already run - Cancel workflow and stop update/create of site service/site** | | Stop workflow with status of:  Canceled  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b723B6179-CDC4-4AF3-A732-EA5E18815752%7d) | | | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Stage 2 - Depending on Order Type - Create, Update, or Close the Regarding or New Service** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **Depending on Order Type - Create, Update, or Close the Regarding or New Service** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Order:Order Type in [Internet New;WAN New;Port Add], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Create New Service** | | Create:  Site Service  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b723B6179-CDC4-4AF3-A732-EA5E18815752%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Order:Order Type in [Internet Upgrade;WAN Downgrade;WAN Upgrade;Internet Downgrade], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the Current Service** | | Update:  Regarding Site Service  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b723B6179-CDC4-4AF3-A732-EA5E18815752%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Order:Order Type in [Closure of Service;Port Remove], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Deactivate the Site Service** | | Change record status to:  Regarding Site Service  Inactive | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Order:Order Type equals [Closure of Site], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Deactivate the Site** | | Change record status to:  School/Site  Inactive | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Stop workflow as no order type is set.** | | Stop workflow with status of:  Canceled  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b723B6179-CDC4-4AF3-A732-EA5E18815752%7d) | | | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Stage 3 - Update the Order** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  | |  | | --- | | **Depending if a Site Service was Updated or Created** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Order:Order Type in [Internet Upgrade;Internet Downgrade;WAN Downgrade;WAN Upgrade;Closure of Service;Port Remove], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the order to the upgraded site service** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b723B6179-CDC4-4AF3-A732-EA5E18815752%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise, if Order:Order Type in [WAN New;Internet New;Port Add], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the order to the created site service** | | Update:  Order  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b723B6179-CDC4-4AF3-A732-EA5E18815752%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **No Action Required** | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b723B6179-CDC4-4AF3-A732-EA5E18815752%7d) | | | | | | | |

## Order Flow (Business Process Flow)

### Set Current Process Stage for Order

**Description**:

Copies the Business Process Flow STAGE to the record's STAGE field for reporting and view purposes.

**Trigger**:

When process is applied

When process stage changes

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **If Active or Finished** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Order Flow:Status Reason in [Active;Finished], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | Update:  Edu\_Order | | | | | |

## Service

### Set Service Name

**Description**:

Sets the name field of the service record to bandwidth and type.

**Trigger**:

On Create

On Change of Bandwidth  
On Change of Type

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **If Service has bandwidth** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Service:Bandwidth contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | Update:  Service  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b2E087F25-FBE3-4233-8C10-6A943DD97463%7d) | | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Otherwise:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | Update:  Service  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b2E087F25-FBE3-4233-8C10-6A943DD97463%7d) | | | | | |

### Update Site Service When Price Changes

**Description**:

This workflow updates the site service current price when the related service's price changes.

**Trigger**:

On change of Current Cost

**Logic**:

NGN.CustomWorkflowActivities (1.0.0.0):NGN.UpdateRelatedSiteServicePrice  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b40F656B1-E3A7-4DBA-B349-B0B1523EC729%7d)

## Site Service

### Create Site Service History

**Description**:

Create a Site Service History record when the model fields on site are edited.

**Trigger**:

On Create  
On change of Service, Total Monthly Charge

**Logic**:

|  |
| --- |
| **Create Site Service History record** |
| Create:  Site Service History  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b91E2C7F5-3DBB-47CD-9387-55E9D10B0EF0%7d) |

### Set School District on Site Service

**Description**:

Sets the School District field on Site Service from the Site's School District.

**Trigger**:

On Create

On Change of Service

**Logic**:

Update:  Site Service  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7bF9126EAE-53B2-4716-A618-9AA9D72F722C%7d)

### Update Site WAN

**Description**:

Sets the Related Site's Current WAN Service if this Site Service's Service is of Type WAN.

**Trigger**:

On Create

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **If the Site Service's Service is WAN** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Service (Service):Type equals [WAN], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Set Site Service as Site's WAN Service** | | Update:  Site  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b0F7CDBA0-E878-473C-BE69-F19B34FFDA36%7d) | | | | | |

## Site

### Update Recommended Model

**Description**:

Fires the Custom Workflow Activity to update the Recommended Model, using the Service Model records.

**Trigger**:

On Create

On Change of Adjusted Enrolment, School Profile Enrolment, Site Type

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **check that site type is set and record is active** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Site:Site Type contains data AND Site:Status equals [Active], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Recommended Service** | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.GetRecommendedServiceFromModel  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b16B3CE8E-2949-4203-AC8A-82BCD1036D9E%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | Update:  Site  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b16B3CE8E-2949-4203-AC8A-82BCD1036D9E%7d) | | | | | |

### Create Site Service History Record

**Description**:

This workflow creates history records of the site's model and tracks current service.

It is triggered when the Site's WAN service is altered, the site's model notes, or when the service model date is changed

(this last point is triggered when a user runs the service model against all services.).

**Trigger**:

On change of: Current WAN Site Service, Model Notes, Modelled Service

**Logic**:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| |  | | --- | |  | | |  | | --- | | **Create Site Model History** | | Create:  Site Model History | |

## Service Price

### Wait Till Service Price Effective Date

**Description**:

When a service price record is created with a status of Future, wait until the effective date then activate the record by changing the status to Current.

**Trigger**:

Record is created  
Record fields change: Effective Date

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  | | --- | | **If effective date in the past, activate immediately** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Service Price:Effective Date <= [Process-Execution Time], then:   |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | |  |  |  |  | | --- | --- | --- | --- | | Start child workflow: | Service Price |  | [Activate Service Price](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b84FAC8F8-DB46-4F52-AE59-482DF5D74A2B%7d) | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | Stop workflow with status of:  Succeeded  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b84FAC8F8-DB46-4F52-AE59-482DF5D74A2B%7d) | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Step description: None provided.** | | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Timeout until Service Price:Effective Date then   |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | |  |  | | --- | --- | | Start child workflow: | Service Price | | | | | | |

### Activate Service Price

**Description**:

Set's the referenced service price record as the current records and change the former current one's status to historical.

**Trigger**:

As a child process

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **confirm record is still set to Future, and the effective date hasn't changed** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Service Price:Status Reason equals [Future] AND Service Price:Effective Date <= [Process-Execution Time], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | NGN.CustomWorkflowActivities (1.0.0.0):NGN.CustomWorkflowActivities.SetAsCurrentPrice  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b3275036A-AD36-4AD5-8059-56CA7B2F0B02%7d) | | | | | |

### Set Service Cost

**Description**:

When a service price record's status is set to current, update the related service and set the price to the service price record's price.

**Trigger**:

Record is created

Record fields change: Status Reason

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **If Service Price is the Current Record** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If Service Price:Status Reason equals [Current], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the Service Record and set the Current Cost from the Current Service Price record** | | Update:  Service  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b1A0D0293-FA38-4AFC-9F96-7FDC7A4467BD%7d) | | | | | |

### Set Service Price Name

**Description**:

Set's the record's name to Service and Effective date.

**Trigger**:

Record is created

Record fields change: Effective Date, Service

**Logic**:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| |  | | --- | |  | | |  | | --- | |  | | Update:  Service Price | |

## School Profile

### School Profile - Set Site's Current Profile

**Description**:

When a School Profile is created, set a site's Current Profile to the triggering profile.

**Trigger**:

Record is created

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Condition for Error Checking** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If School Profile:School/Site contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Update the School's Current Profile** | | Update:  School/Site  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b21249A7F-7762-4C5E-B08A-0D4BB665A296%7d) | | | | | |

### Set School Profile Name

**Description**:

Sets the Name field for the Record which is used when viewing the record via a Lookup.

**Trigger**:

Record is created  
Record fields change: School Year

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Step description: None provided.** | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | If School Profile:School Year contains data, then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | |  | | Update:  School Profile  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b6F1D12B6-4991-4D9D-8D70-68A72DBEA3D0%7d) | | | | | |

## Service Model

### Set Service Model Name

**Description**:

Set's the record's name to Site Type plus Maximum Enrolment.

**Trigger**:

Record is created  
Record fields change: Maximum Enrolment, Site Type

**Logic**:

|  |  |  |
| --- | --- | --- |
| |  | | --- | |  | | Update:  Service Model | |

### Deactivate Service Model

**Description**:

This workflow deactivates the selected record and set's the expiry date to the current date.

**Trigger**:

As an on-demand process

**Logic**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | |  | | --- | | **Confirm record is active** | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | If Service Model:Status equals [Active], then:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Set expiry date to today** | | Update:  Service Model  [View properties](https://ngndev.crm3.dynamics.com/sfa/workflow/edit.aspx?_CreateFromId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&_CreateFromType=7100&appSolutionId=%7b7B829BC6-4039-E911-A97C-000D3AF42A5A%7d&id=%7b0AF81815-D652-41DB-8F27-DBC4F74F0242%7d) | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  |  | | |  | | --- | | **Deactivate record** | | Change record status to:  Service Model  Inactive | | | | | |