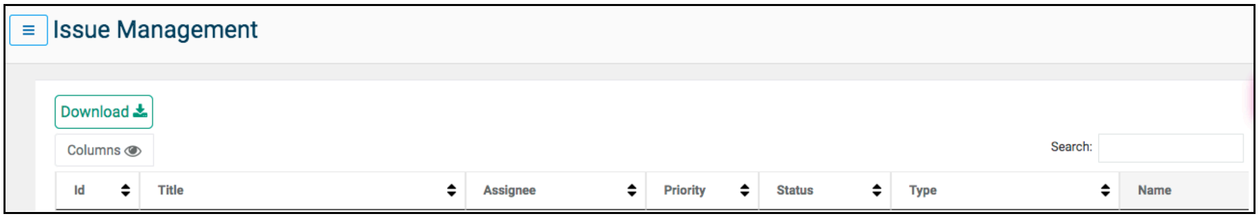
Workflow Configuration Guide

Basic Configurations

Change report name

This will change the name of the report in the incident table and incident report.
Default - Case

```
"reportNamePrefix":"Issue"
```



Id	Title	Assignee	Priority	Status	Type	Name

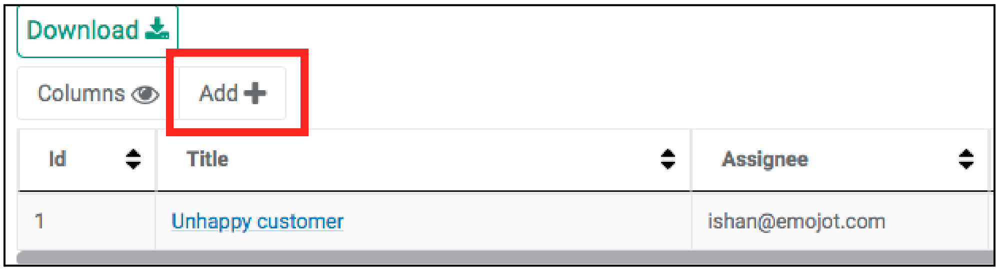
Name and Description Template

```
{
  "nameTemplate":"Incident create $status$ $customer_name$",
  "descriptionTemplate":"Description $status$ $customer_name$"
}
```

Incident create sensor

Use sensor short URL for this. This will add a popup sensor for the incident table and user no need to load the sensor separately.

```
"reportSensor" : "inci1"
```



Id	Title	Assignee
1	Unhappy customer	ishan@emojot.com

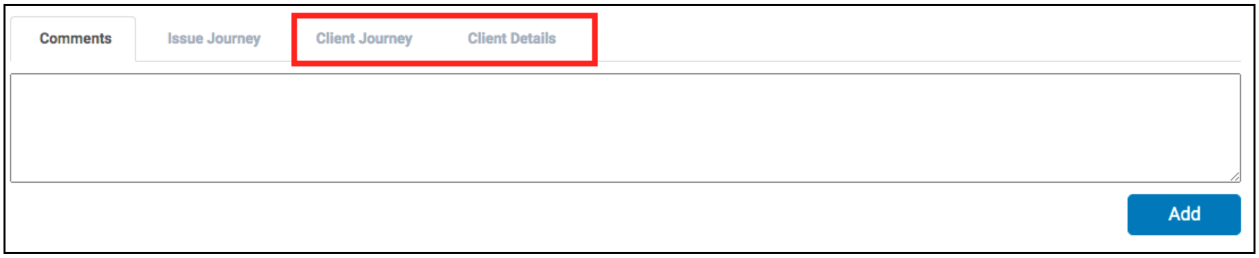
Change Admin List

```
"adminListName" : "listname",
```

Change reporter name

This will change the name prefix in Journey and Details tab in Incident edit page.
Default - Customer (Customer Journey / Customer Details)

```
"reporterNamePrefix":"Client"
```

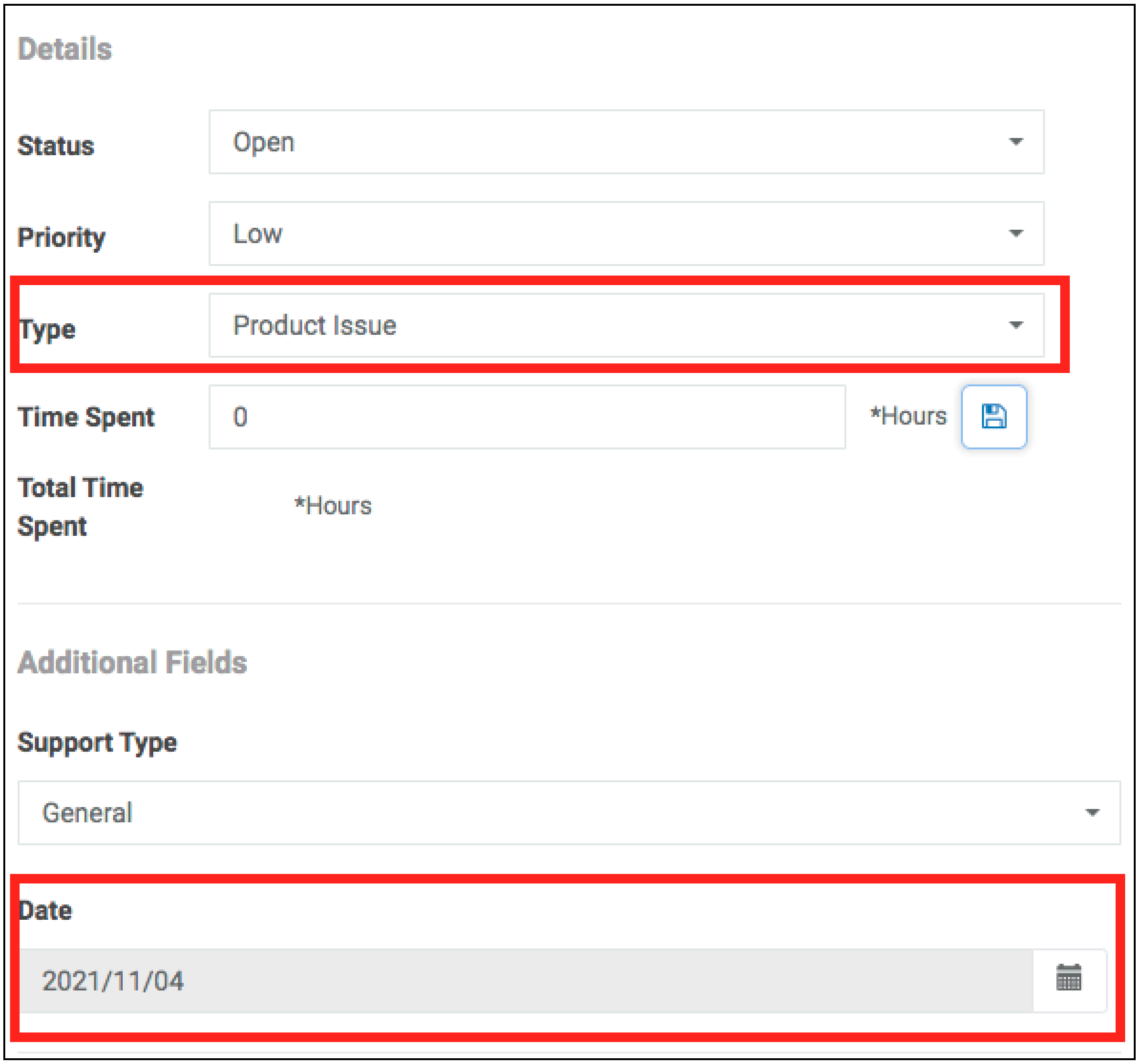


Editable Fields based on Status / Type

Make field editable based on the selected type and the status.Works only for Type and Status related flows.

```
 "type" : {
        "name" : "Type",
        "type" : "enum",
        "values" : [
            {
                "id" : "Inquiry",
                "name" : "Inquiry"
            },
            {
                "id" : "Product Issue",
                "name" : "Product Issue",
                "editableFields" : [
                    "supportType"
                ]
            },
            {
                "id" : "CX Issue",
                "name" : "CX Issue"
            }
        ]
    }
```

Ex - When the user changes type to Product Issue , only the Support type field shows as editable and other fields get disabled.



Details

Status: Open

Priority: Low

Type: Product Issue

Time Spent: 0 *Hours

Total Time Spent: *Hours

Additional Fields

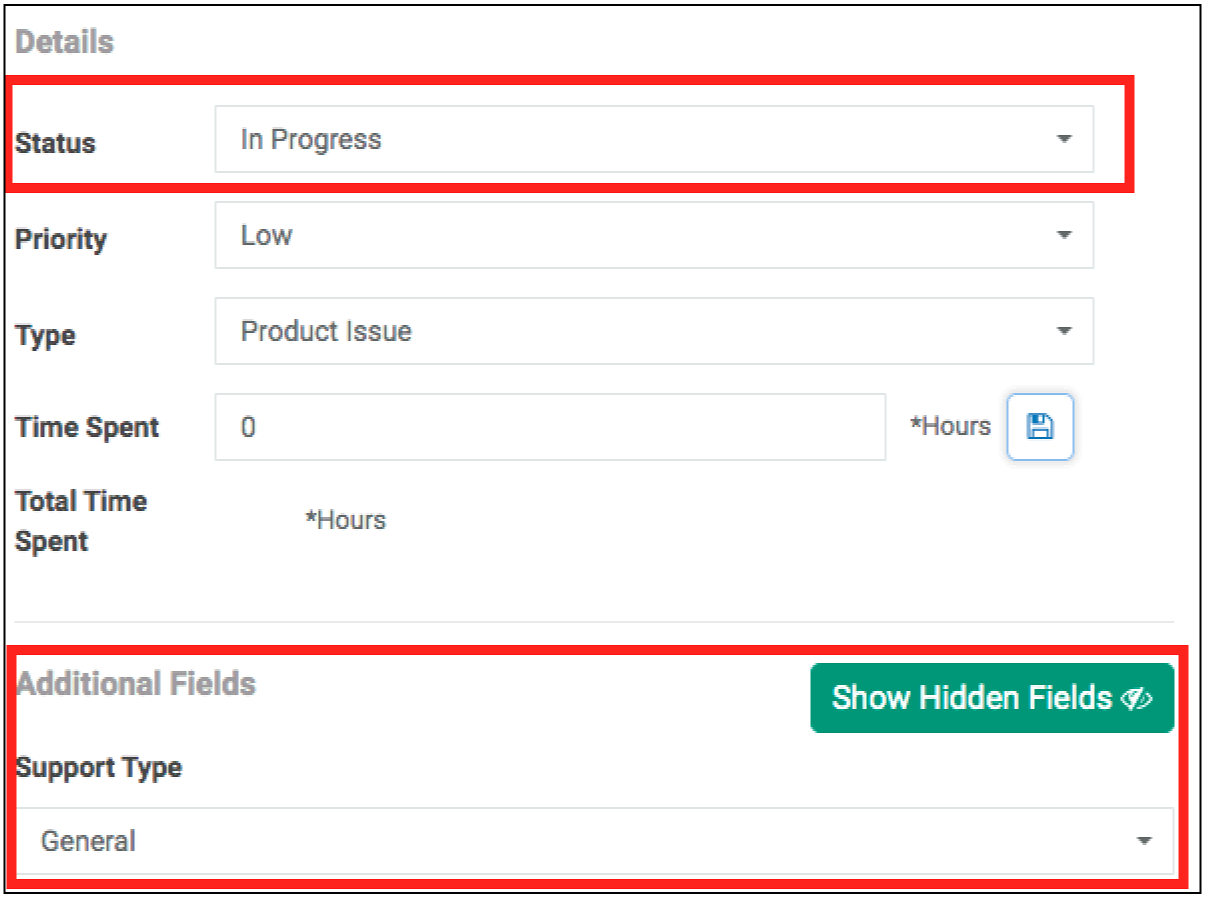
Support Type: General

Date: 2021/11/04

High Priority Fields

If you have a lot of custom fields and need to show only a few required fields while hiding other “highPriorityFields” property can be used.

```
"status" : {
        "name" : "Status",
        "type" : "enum",
        "values" : [
            {
                "id" : "Open",
                "name" : "Open"
            },
            {
                "id" : "In Progress",
                "name" : "In Progress",
                "highPriorityFields" : [
                    "supportType"
                ]
            } ] }
```



Details

Status: In Progress

Priority: Low

Type: Product Issue

Time Spent: 0 *Hours

Total Time Spent *Hours

Additional Fields

Support Type: General

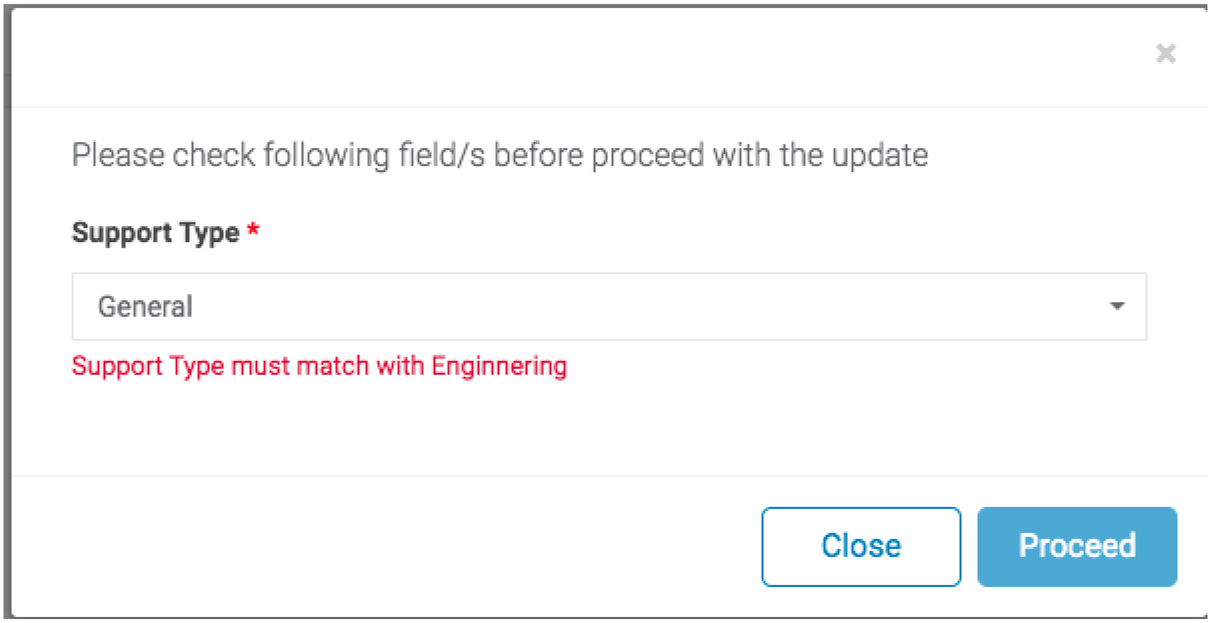
Status Transition Validation

Show required field popup when change value from one state to another.

```
 "status" : {
        "name" : "Status",
        "type" : "enum",
        "values" : [
            {
                "id" : "Validating",
                "name" : "Validating",
                "fieldsValidation" : [
                    {
                        "fieldID" : "supportType",
                        "value" : "Engineering",
                        "required" : true,
                        "message" : "Support Type must match with
Engineering"
```

```
                    }
                ]
            }
        ]
    },
```

Ex - When the users try to change status to Validating, it required to set Support type as “Engineering” before proceeding the update.



Please check following field/s before proceed with the update

Support Type *

General

Support Type must match with Enginnering

There are multiple properties available in this field's values.

Min File count

For the files you can specify the minimum no of files required to upload before proceed

```
{
  "fieldID": "certificate_File",
  "required": false,
  "minFileCount": 1,
  "message": "Must upload at least 1 file"
}
```

String Validation

```
{
  "fieldID": "userEmail",
  "validationRegex":
"^((\"[\\w-\\s]+\")|([\\w-]+(?:\\.[\\w-]+)*)|(\"[\\w-\\s]+\")([\\w-]+(?:\\.
[\\w-]+)*))(@((?:[\\w-]+\\.)*\\w[\\w-]{0,66})\\.([a-z]{2,6}(?:\\.[a-z]{2})?
)$)|(@\\[?((25[0-5]\\.|2[0-4][0-9]\\.|1[0-9]{2}\\.|[0-9]{1,2}\\.))((25[0-5]
|2[0-4][0-9]|1[0-9]{2}|[0-9]{1,2})\\.){2}(25[0-5]|2[0-4][0-9]|1[0-9]{2}|[0-
9]{1,2})\\]?$)",
  "required": true,
  "message": "Please specify email"
}
```

Comment field

```
{
  "fieldID": "inbuild_comment",
  "required": false
}
```

Dropdown field check

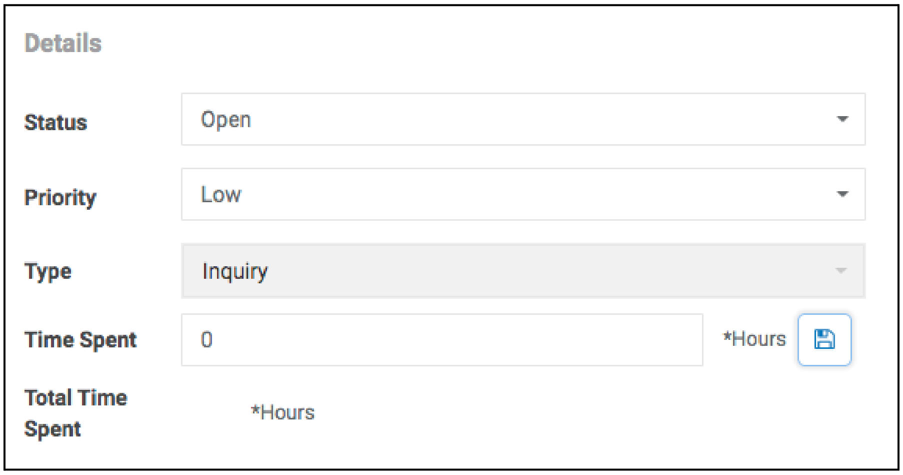
Check whether the dropdown field value match with specified value

```
{
  "fieldID": "supportType",
  "value": "Engineering",
  "required": true,
  "message": "Support Type must match with Engineering"
}
```

Read Only Fields

Convert field to a read only field. This will support both in built and custom fields

```
"type" : {
        "name" : "Type",
        "type" : "enum",
        "readOnly" : true
}
```



Details

Status	Open	
Priority	Low	
Type	Inquiry	
Time Spent	0	*Hours
Total Time Spent		*Hours

Status transitions

If you need to show status on the predefined order transition can be used inside the status.
Ex - Following config only show Pending and Verify status in the initial load. When the user change status to Verify it will show Verify(Current status) and Rejected and Closed.

```
"transitions" : [
            {
                "sourceState" : "Pending",
                "targetStates" : [
                    "Verify"
                ]
            },
            {
                "sourceState" : "Verify",
                "targetStates" : [
                    "Rejected",
                    "Closed"
                ]
            }
        ]
```

Conditional Status Transitions

```
"conditionalTransitions" : [
            {
                "condition" : {
                    "and" : [
                        {
                            "==" : [
                                {
                                    "var" : "type"
                                },
                                "Man"
                            ]
                        }
                    ]
                },
                "transitions" : [
                    {
                        "sourceState" : "Escalation",
                        "targetStates" : [
                            "In-Progress"
                        ]
                    },
                    {
                        "sourceState" : "Pending",
                        "targetStates" : [
                            "In-Progress",
                            "Validating"
                        ]
                    }
                ]
            },
            {
                "condition" : {
                    "and" : [
                        {
                            "==" : [
                                {
                                    "var" : "type"
                                },
                                "Material"
                            ]
                        }
                    ]
                },
                "transitions" : [
                    {
                        "sourceState" : "In-Progress",
                        "targetStates" : [
                            "Validating"
                        ]
                    },
                    {
                        "sourceState" : "Validating",
                        "targetStates" : [
                            "Validating Done",
                            "resolved"
                        ]
                    }
                ]
            }
        ],
```

State restriction based on User

userRestriction needs to be added inside the status property.

There are mainly two types of restriction

1. **Default**
    a. This will restrict the status if the user credentials are in the **userList** array.
2. **userBased** -
    a. This will default restrict the status and if the current logged in user is found in the **owners** array of the particular incident object it will allow edit access. If not reported need to be matched with the current logged in user. Then it will allow status under the reporter config. If the reported is not the person who is accessing the incident, then those uses need to be add under the admin list.

```
"userRestriction" : [
            {
                "restrictionType" : "userBased",
                "owner" : {
                    "allowStatus" : [
                        "in progress",
                        "Validating"
                    ]
                },
                "reporter" : {
                    "allowStatus" : [
                        "open",
                        "in progress"
                    ]
                },
                 "admin" : {
                    "emails" : [
                        "ishane14@mailinator.com",
                        "ishane3@mailinator.com"
                    ],
                    "allowStatus" : [
                        "Open",
                        "Desktop Review"
                    ]
                }
            },
            {
                "userList" : [
                    "demouser@gmail.com"
                ],
                "allowStatus" : [
                    "open",
                    "in progress",
                    "Validating",
                    "Validating Done",
                    "resolved"
                ],
                "editableFields" : {
                    "type" : "status",
                    "values" : [
                        {
                            "statusID" : "open",
                            "fields" : [
                                "userEmail",
                                "telephone"
                            ]
                        },
                        {
                            "statusID" : "in progress",
                            "fields" : [
                                "supportType",
                                "userEmail",
                                "telephone"
                            ]
                        }
                    ]
                },
                "highPriorityFields" : [
                    {
                        "statusID" : "open",
                        "fields" : [
                            "supportType",
                            "userEmail"
                        ]
                    }
                ]
            },]
```

User-based restrictions

Admin Hierarchy based field restriction and transition can be added.

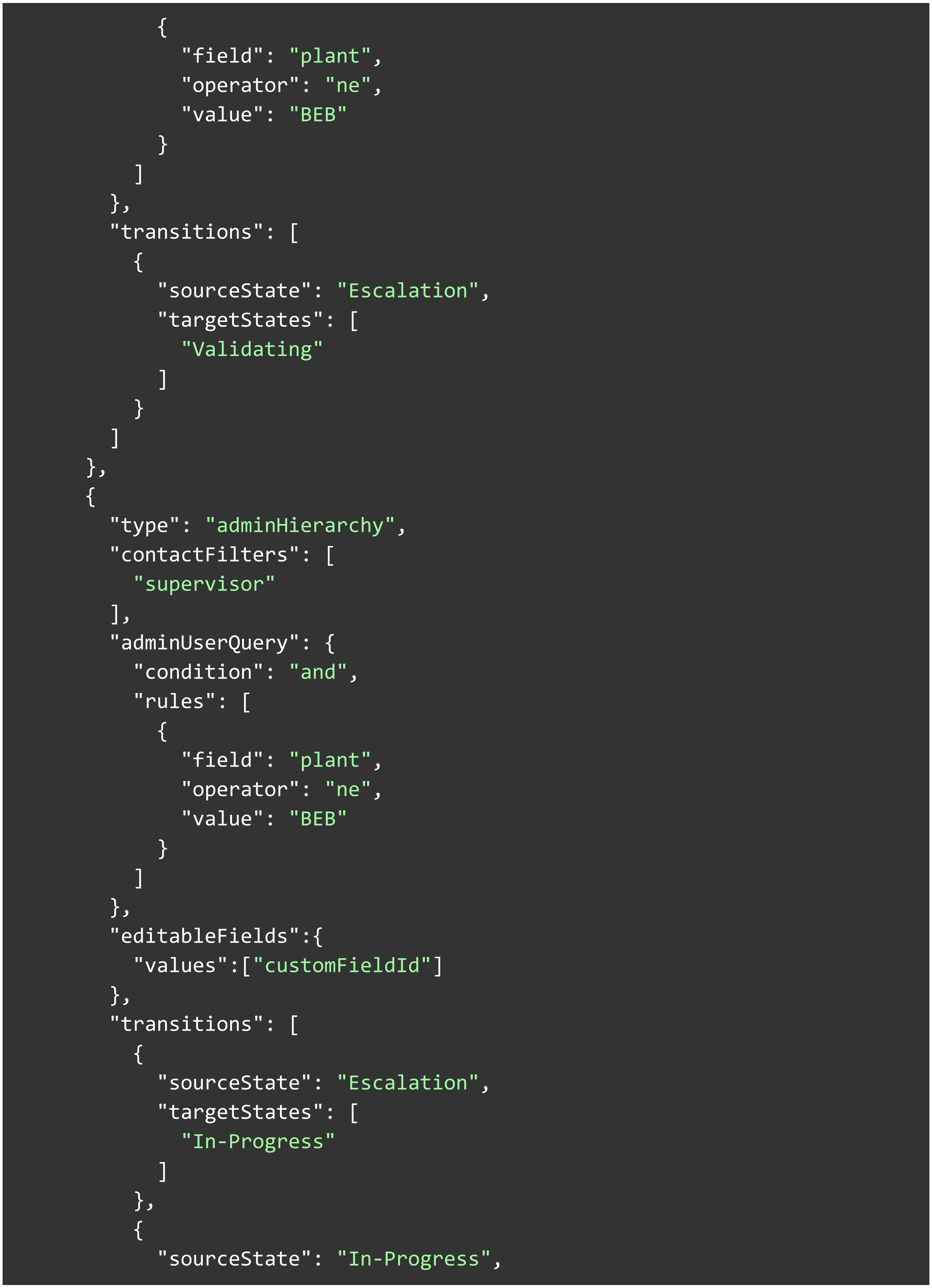
type	adminHierarchy owners	

Admin Hierarchy Type

contactFilters	Consider only the record in the specified column in admin hieararchy
adminUserQuery	Query that need to be filter user from the admin hierarchy
transitions	Allowed status transition will be executed if there are atleast one user matched the query
editableFields	Only the specified field will be allowed. If we

```
{
  "userBaseRestrictions": {
    "baseConditions": [
      {
        "type": "adminHierarchy",
        "contactFilters": [
          "keyPerson"
        ],

        "adminUserQuery": {
          "condition": "and",
          "rules": [
```

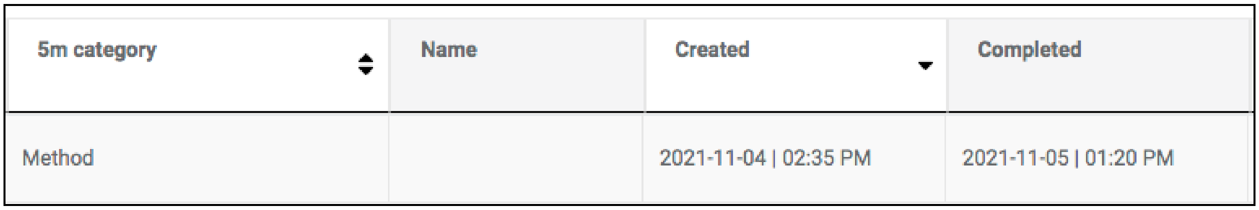


```
            {
              "field": "plant",
              "operator": "ne",
              "value": "BEB"
            }
          ]
        },
        "transitions": [
          {
            "sourceState": "Escalation",
            "targetStates": [
              "Validating"
            ]
          }
        ]
      },
      {
        "type": "adminHierarchy",
        "contactFilters": [
          "supervisor"
        ],
        "adminUserQuery": {
          "condition": "and",
          "rules": [
            {
              "field": "plant",
              "operator": "ne",
              "value": "BEB"
            }
          ]
        },
        "editableFields":{
          "values":["customFieldId"]
        },
        "transitions": [
          {
            "sourceState": "Escalation",
            "targetStates": [
              "In-Progress"
            ]
          },
          {
            "sourceState": "In-Progress",
            "targetStates": [
              "Validating"
            ]
          }
        ]
      }
    ]
  }
}
```

Final State

Specify the final state of the workflow. This will be used for complete date calculation.

```
"finalState" : true,
```



5m category	Name	Created	Completed
Method		2021-11-04 | 02:35 PM	2021-11-05 | 01:20 PM

Status Colour

Add colour to a different status. This colour will appear in incident table.

```
           {
                "id" : "Pending",
                "name" : "Pending",
                "backgroundColor" : "#f4b000",
                "textColor" : "#fff"
            }
```

Admin Hierarchy

Field	Opt/Man	Description
list	required	Email list name
customFieldsEditEnabled	Optional	Can CustomField type editable
userBaseRestrictions	Optional	Restricted selected contact columns based on users
headers	required	Table headers. There are two types like customField and contact

```
"adminHierarchy" : {
        "list" : "adminList",
        "customFieldsEditEnabled" : true,
        "userEmoSignatureFiltering" : true,
        "userBaseRestrictions" : [
            {
                "emails" : [
                    "ishan@emojot.com"
                ],
                "restrictedColumns" : [
                    "factoryAccountant",
                    "factoryGM"
                ],
                "allowedColumns3" : [
                    "factoryAccountant"
                ]
            }
        ],
        "headers" : [
            {
                "id" : "cluster",
                "name" : "Cluster",
                "type" : "customField"
            },
            {
                "id" : "plant",
                "name" : "Plant",
                "type" : "customField"
            },
            {
                "id" : "function",
                "name" : "Function",
                "type" : "customField"
            },
            {
                "id" : "subArea",
                "name" : "Sub Area",
                "type" : "customField"
            },
            {
                "id" : "controlOwner",
                "name" : "Control Owner",
                "type" : "contact"
            },
            {
                "id" : "factoryAccountant",
                "name" : "Factory Accountant",
                "type" : "contact"
            },
            {
                "id" : "factoryGM",
                "name" : "Factory GM",
                "type" : "contact"
            },
            {
                "id" : "SBUFunctionalHead",
                "name" : "SBU Functional Head",
                "type" : "contact"
            },
            {
                "id" : "SBUFinanceHead",
                "name" : "SBU Finance Head",
                "type" : "contact"
            },
            {
                "id" : "groupPillarHead",
                "name" : "Group Pillar Head",
                "type" : "contact"
            },
            {
                "id" : "groupFunctionalHead",
                "name" : "Group Functional Head",
                "type" : "contact"
            }
        ]
    },
```

Triggers

Triggers can be used to add action when the user changes a particular value. As an example If we want to send an email when the user changes Status from Open to In progress we can use triggers.

```
"status" : {
       "name" : "Status",
       "type" : "enum",
       "values" : [
           {
               "id" : "Open",
               "name" : "Open"
           },
           {
               "id" : "In Progress",
               "name" : "In Progress"
```

```
            "triggers" : [
                {
                    "channel" : "email",
                    "template" : "inProgressTemplateAdmin",
                    "target" : "admin",
                    "contacts" : [
                        "admin@emojot.com"
                    ]
                }
            ]
        },
```

Alert

Alert can be either SMS or an Email. In the trigger config channel property will be used to identify the type. But other properties will be same for both Email and SMS alerts.

Send Email

Field	Opt/Man	Description
target	required	**admin** - send to specified email in contacts array **customer** - send to created user **employee** - send to assignee

```
        {
            "template" : "CreationAlertAdmin",
            "target" : "admin",
            "channel" : "email",
            "contacts" : [
                "ishan@emojot.com"
            ]
            }
```

Send Email to Predefined set of user(admin)

Contacts list must need to be specified

```
            {
                "template" : "CreationAlertAdmin",
                "target" : "admin",
                "channel" : "email",
                "contacts" : [
                    "ishan@emojot.com"
                ]
            }
```

Send Email to Assignee

No need to add contacts list here because this will send alert based on the assignee and it will pickup by the system.

```
      {
        "channel": "email",
        "template": "creationAlertEmployee",
        "target": "employee"
      }
```

Send Email to users

```
      {
        "channel": "email",
        "template": "creationAlertCustomer",
        "target": "customer"
      }
```

Send to Admin Users from Hierarchy

```
{
    "template" : "adminhie",
    "channel" : "email",
    "target" : "admin",
    "contactFilters" : [
        "keyPerson",
        "supervisor"
    ],
    "adminUserQuery" : {
        "condition" : "and",
        "rules" : [
            {
              "field" : "customer",
              "operator" : "eq",
              "value" : "$customer$"
            },
            {
               "field" : "cluster",
               "operator" : "eq",
               "value" : "$cluster$"
            }
         ]
     }
 }
```

Send to Email Address in Custom Fields

```
{
    "template" : "adminhie",
    "channel" : "email",
    "target" : "admin",
    "customFields":["field1","field2"]
 }
```

Send SMS in Custom Fields

```
{
    "template" : "adminhie",
    "channel" : "sms",
    "target" : "admin",
   "customFields":["field1","field2"]
}
```

Send SMS

Field	Opt/Man	Description
target	required	**admin** - send to specified email in contact array **customer** - send to created user **employee** - send to assignee
appendEditUrl	optional	

```
                     {
                           "template" : "adminSMS",
                           "target" : "admin",
                           "channel" : "sms",
                           "contacts" : [
                               "+94701118370",
                               "+94716097337"
                           ],
                           "appendEditUrl" : true
                       }
```

Send SMS to Predefined set of user(admin)

```
                     {
                           "template" : "adminSMS",
                           "target" : "admin",
                           "channel" : "sms",
                           "contacts" : [
                               "+94704444444",
                               "+94712222222"
                           ],
                           "appendEditUrl" : true
                       }
```

Send SMS to Assignee

```
           {
                 "template" : "assignmentSMS",
                 "target" : "employee",
                 "channel" : "sms"
             }
```

Send Email to issue creator

```
           {
                 "template" : "creationSMS",
                 "target" : "customer",
                 "channel" : "sms"
             }
```

Fields Change

```
{
     "channel" : "fieldChange",
     "condition" : {
         "and" : [
             {
                 "==" : [
                     {
                         "var" : "priority"
                     },
                     "Medium"
                 ]
             }
         ]
     },
     "changingFields" : [
         {
             "id" : "supportType",
             "value" : "engineering"
         },
                    {
                        "id" : "status",
                        "value" : "Unsatisfactory and Not Recommended"
                    }
                ]
           }
```

Field Change based on Admin Hierarchy

```
      {
        "channel": "fieldChange",
        "changingFields": [
          {
            "id": "owners",
            "contactFilters": [
              "keyPerson",
              "supervisor"
            ],
            "adminUserQuery": {
              "condition": "and",
              "rules": [
                {
                  "field": "customer",
                  "operator": "eq",
                  "value": "$customer$"
                },
                {
                  "field": "cluster",
                  "operator": "eq",
                  "value": "$cluster$"
                }
              ]
            }
          }
        ]
      }
```

Assignee change

```
{
                "condition" : {
                    "and" : [
                        {
                            "==" : [
                                {
                                    "var" : "priority"
                                },
                                "Moderate"
                            ]
                        }
                    ]
                },
                "channel" : "fieldChange",
                "changingFields" : [
                    {
                        "id" : "assignee",
                        "value" : "emojot@gmail.com"
                    }
                ]
            }
```

Assignee change based on Admin Hierarchy

```
{
                "channel" : "fieldChange",
                "changingFields" : [
                    {
                        "id" : "assignee",
                        "contactFilters" : [
                            "keyPerson"
                        ],
                        "adminUserQuery" : {
                            "condition" : "and",
                            "rules" : [
                                {
```

```
                        "field" : "plant",
                        "operator" : "eq",
                        "value" : "$plant$"
                    },
                    {
                        "field" : "function",
                        "operator" : "eq",
                        "value" : "$function$"
                    }
                ]
            }
        }
    ]
}
```

Status and Assignee change directly from Incident Table

Update **status and assignee** directly in the **Incident Table** without opening the detailed view.

```
{
    "tableEdit" : "true"
}
```

Revert Fields change

```
    {
        "channel" : "fieldChangeRevert",
        "changingFields" : [
            {
                "id" : "secondDoseStatus",
                "value" : "NO"
            }
        ]
    }
```

File Preview in Incident Table

Update **status and assignee** directly in the **Incident Table** without opening the detailed view.

```
{
   "filePreview":"true"
}
```

Loyalty Fields Sync

```
{
           "channel" : "loyaltyFieldSync",
           "syncFields" : [
               {
                   "caseField" : "ag",
                   "loyaltyField" : "Age"
               },
               {
                   "caseField" : "stat",
                   "loyaltyField" : "Status"
               }
           ]
       }
```

Automatic escalation reset

```
{
    "channel" : "automaticEscalationReset",
    "condition" : {
        "==" : [
            {
                "var" : "status"
            },
            "Desktop Review"
        ]
    }
}
```

Fields calculator

Field	Opt/Man	Description
evaluationFields	required	Check log object and add value to the main evaluation object as **evaluationProperty** key. This key must be used in evaluation expression
changingFIeld	required	Field which need to set new value
evaluationExpression	required	Condition

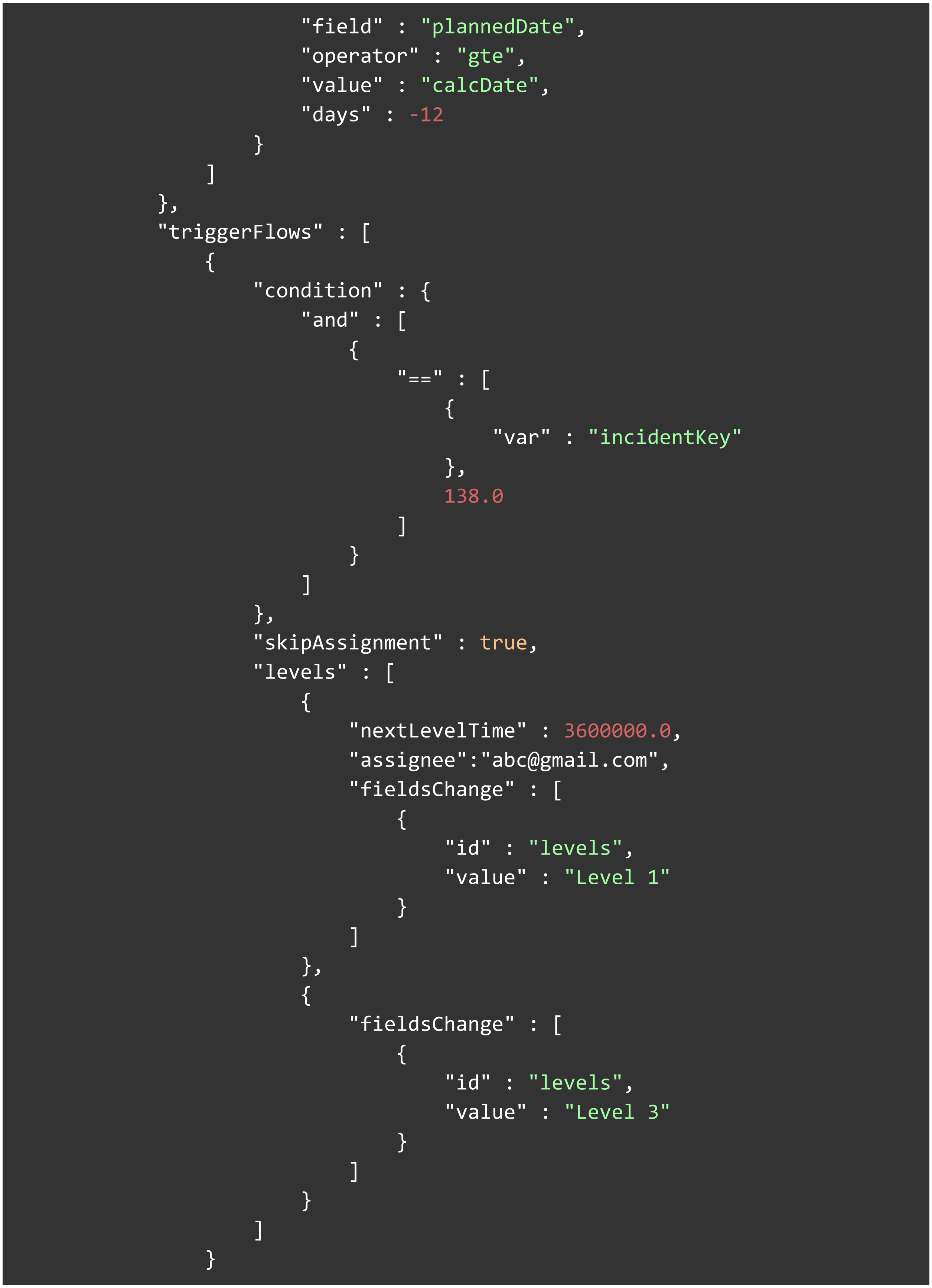
```
{
     "channel" : "fieldCalculator",
     "evaluationFields" : [
         {
             "type" : "status_change",
             "matchFirst" : false,
             "statusValue" : "Resolved",
             "evaluationProperty" : "resolveTime"
         }
     ],
     "changingField" : {
         "id" : "timeTaken"
     },
     "evaluationExpression" : {
         "-" : [
             {
                 "var" : "resolveTime"
             },
             {
                 "var" : "timeStamp"
             }
```

```
                            ]
                        }
                    }
```

Automatic Assignment

Field	Opt/Man	Description
email	M	Assignment email used to change the field. This email shows in the workflow change under the “changed By” field
filteringQuery	O	Used to reduce no of records get to the query
triggerFlows	M	Flows need to be execute to each schedule.
triggerFlows > skipAssignment	O	Case will not assign to a new user and will change only the fields under the level array
triggerFlows > levels > assignee	O	New assignee when change the level. If the skipAssignment mentioned as true, this assignment will not occur.
triggerFlows > levels > nextLevelTime	M	Time in a millisecond the next level need to be changed

```
{
  "assignment" : {
        "automaticAssignment" : {
            "isEnabled" : true,
            "email" : "bot@gmail.com",
            "filteringQuery" : {
                "condition" : "and",
                "rules" : [
                    {
                        "field" : "plannedDate",
                        "operator" : "lte",
                        "value" : "currentDate"
                    },
                    {
```



```
                    "field" : "plannedDate",
                    "operator" : "gte",
                    "value" : "calcDate",
                    "days" : -12
                }
            ]
        },
        "triggerFlows" : [
            {
                "condition" : {
                    "and" : [
                        {
                            "==" : [
                                {
                                    "var" : "incidentKey"
                                },
                                138.0
                            ]
                        }
                    ]
                },
                "skipAssignment" : true,
                "levels" : [
                    {
                        "nextLevelTime" : 3600000.0,
                        "assignee":"abc@gmail.com",
                        "fieldsChange" : [
                            {
                                "id" : "levels",
                                "value" : "Level 1"
                            }
                        ]
                    },
                    {
                        "fieldsChange" : [
                            {
                                "id" : "levels",
                                "value" : "Level 3"
                            }
                        ]
                    }
                ]
            }
            ]
        }
    },
}
```

Workflow creation triggers

```
"workflowCreation": {
    "email": "bot@gmail.com",
    "triggers": [
      {
        "channel": "email",
        "template": "creationAlertEmployee",
        "target": "employee"
      }
    ]
  }
```

You can use any triggers specified in the trigger section and will be executed in the order.

Custom Field Types

<table>
<tr><th>Type</th><th>Description</th></tr>
<tr><td>enum</td><td>Single select dropdown</td></tr>
<tr><td colspan="2"><pre>
 "environment" : {
            "name" : "Environment",
            "type" : "enum",
            "values" : [
                {
                    "id" : "Production",
                    "name" : "Production"
                }
            ]
        }
</pre></td></tr>
<tr><td>string</td><td>Input fields</td></tr>
<tr><td colspan="2"><pre>
"am_name" : {
            "name" : "Account manager name",
            "type" : "string"
        }
</pre></td></tr>
<tr><td>date</td><td>Date selection</td></tr>
<tr><td colspan="2"><pre>
"plannedDate" : {
            "name" : "Planned date",
            "type" : "date",
             "range": {
             "minDate": "currentDate",
               "maxDate": 1645329798
          }
        },
</pre></td></tr>
<tr><td>multiselect</td><td>Multi select dropdown</td></tr>
<tr><td colspan="2"><pre>
"account_region" : {
            "name" : "Account region",
            "type" : "multiselect",
            "values" : [
</pre></td></tr>
</table>

```
                {
                    "id" : "North America",
                    "name" : "North America"
                },
                {
                    "id" : "Asia pacific",
                    "name" : "Asia pacific"
                },
                {
                    "id" : "Europe",
                    "name" : "Europe"
                }
            ]
        },
```

file	File upload

```
"mediaFiles" : {
            "name" : "Media",
            "type" : "file"
        },
```

comment	This only work inside status transition validation fields

```
{
  "fieldID" : "inbuild_comment"
}
```

action	

```
"triggerAction" : {
            "name" : "Trigger Action",
            "type" : "action"
 },
```

textArea	Multiline text field

```
"description" : {
            "name" : "Description",
            "type" : "textArea"
 },
```

objectList	List of Objects / Complex fields

```
"projects" : {
```

```
            "name" : "Projects",
            "type" : "objectList",
            "insertEnabled" : true,
            "values" : [
                {
                    "id" : "name",
                    "name" : "Name",
                    "type" : "string"
                },
                {
                    "id" : "project_key",
                    "name" : "Project key",
                    "type" : "string"
                },
                {
                    "id" : "test_start",
                    "name" : "test start",
                    "type" : "date"
                },
                {
                    "id" : "subscription",
                    "name" : "Subscription",
                    "type" : "objectList",
                    "multiple" : false,
                    "values" : [
                        {
                            "id" : "sub_type",
                            "name" : "Type",
                            "type" : "enum",
                            "values" : [
                                {
                                    "id" : "managed_cloud",
                                    "name" : "Managed cloud"
                                },
                                {
                                    "id" : "dev_support",
                                    "name" : "Dev support"
                                },
                                {
                                    "id" : "professional_services",
                                    "name" : "Professional services"
                                },
                                {
                                    "id" : "evaluation",
                                    "name" : "Evaluation"
                                }
                            ]
                        },
                        {
                            "id" : "sub_query_hours",
                            "name" : "Query hours",
                            "type" : "string"
                        },
                        {
                            "id" : "sub_period_start",
                            "name" : "Period start",
                            "type" : "date"
                        },
                        {
                            "id" : "sub_period_end",
                            "name" : "Period end",
                            "type" : "date"
                        }
                    ]
                },
                {
                    "id" : "products",
                    "name" : "Products",
                    "type" : "objectList",
                    "multiple" : true,
                    "values" : [
                        {
                            "id" : "product_name",
                            "name" : "Product name",
                            "type" : "string"
                        },
                        {
                            "id" : "product_version",
                            "name" : "Version",
                            "type" : "string"
                        }
                    ]
                }
            ]
```

```
        }
```

Advanced Configurations

Reminders

Field	Opt/Man	Description
repeat	M	Repeat interval whether **daily , hourly or weekly. Don't use hourly in prod**
timeZone	O	Timezone represent the time property inside the trigger flows
filteringQuery	O	This can be used to reduce the number of records retrieve through a single query.

Daily Reminder

```
{
  "workflowGlobalConfig" : {
        "reminders" : {
            "isEnabled" : true,
            "timeZone" : "+05:30",
            "filteringQuery" : {
                "condition" : "and",
            "rules" : [
                {
                    "field" : "plannedDate",
                    "operator" : "lte",
                    "value" : "currentDate"
                },
                {
                    "field" : "plannedDate",
                    "operator" : "gte",
                    "value" : "calcDate",
                    "days" : -1
                }
            ]
        },

        "triggerFlows" : [
            {
                "condition" : {
                    "and" : [
                        {
                            "==" : [
                                {
                                    "var" : "status"
                                },
                                "Open"
                            ]
                        },
                        {
                            "==" : [
                                {
                                    "var" : "incidentKey"
                                },
                                1593
                            ]
                        }
                    ]
                },
                "repeat" : "daily",
                "time" : "10:20",
                "triggers" : [
                    {
                        "template" : "ReminderAlert",
                        "target" : "admin",
                            "channel" : "email",
                            "contacts" : [
                                "ishan@emojot.com"
                            ]
                        }
                    ]
                }
            ]
        }
    }

}
```

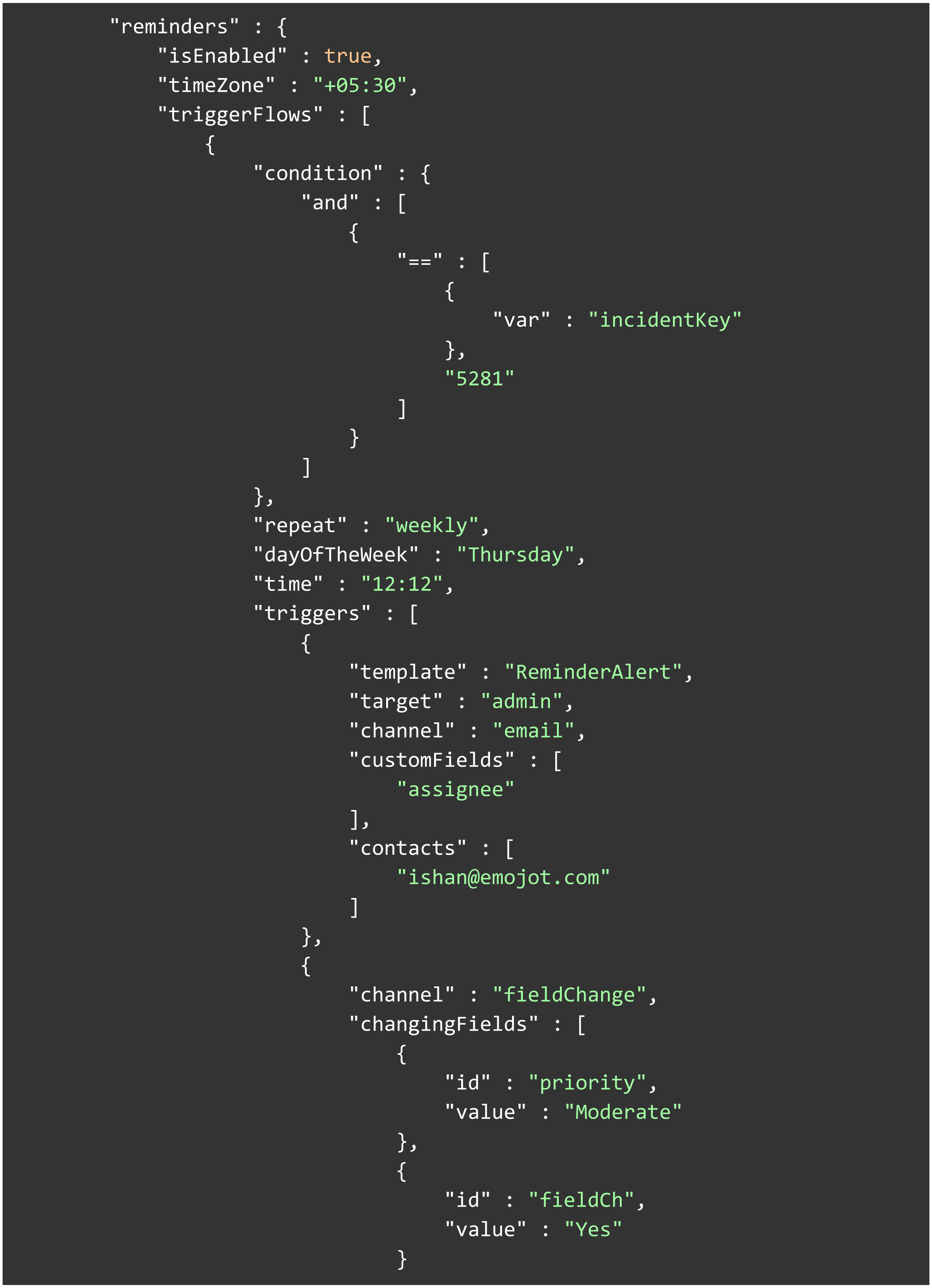
Hourly Reminder (Only for testing purpose)

```
"workflowGlobalConfig" : {
        "reminders" : {
            "isEnabled" : true,
            "timeZone" : "+05:30",
            "filteringQuery" : {
                "condition" : "and",
                "rules" : [
                    {
                        "field" : "plannedDate",
                        "operator" : "lte",
                        "value" : "currentDate"
                    },
                    {
                        "field" : "plannedDate",
                        "operator" : "gte",
                        "value" : "calcDate",
                        "days" : -1
                    }
                ]
            },

            "triggerFlows" : [
                {
                    "condition" : {
                        "and" : [
                            {
                                "==" : [
                                    {
                                        "var" : "status"
                                    },
                                    "Open"
                                ]
                            },
                            {
                                "==" : [
                                    {
                                        "var" : "incidentKey"
                                    },
                                    1593
                                ]
                            }
                        ]
                    },
                    "repeat" : "hourly",
                    "repeatInterval" : 1,
                    "triggers" : [
                        {
                            "template" : "ReminderAlert",
                            "target" : "admin",
                            "channel" : "email",
                            "contacts" : [
                                "ishan@emojot.com"
                            ]
                        }
                    ]
                }
            ]
        }
    }
```

Weekly Reminder

```
{
  "workflowGlobalConfig" : {
```



```
        "reminders" : {
            "isEnabled" : true,
            "timeZone" : "+05:30",
            "triggerFlows" : [
                {
                    "condition" : {
                        "and" : [
                            {
                                "==" : [
                                    {
                                        "var" : "incidentKey"
                                    },
                                    "5281"
                                ]
                            }
                        ]
                    },
                    "repeat" : "weekly",
                    "dayOfTheWeek" : "Thursday",
                    "time" : "12:12",
                    "triggers" : [
                        {
                            "template" : "ReminderAlert",
                            "target" : "admin",
                            "channel" : "email",
                            "customFields" : [
                                "assignee"
                            ],
                            "contacts" : [
                                "ishan@emojot.com"
                            ]
                        },
                        {
                            "channel" : "fieldChange",
                            "changingFields" : [
                                {
                                    "id" : "priority",
                                    "value" : "Moderate"
                                },
                                {
                                    "id" : "fieldCh",
                                    "value" : "Yes"
                                }
                            ]
                        }
                    ]
                }
              ]
        }
    }
}
```

Hide High priority fields collapse

This will hide the Show/hide button when showing high priority fields. Then the user can see what are the low-priority field for a given state.

```
"workflowGlobalConfig" : {
        "hideHighPriorityFieldCollapse" : false,
        }
    }
```

High priority field filter method

There can intersect values When filtering high priority fields using both type and status. In that scenario, this property can be used to decide how those intersection values need to be resolved. That value can be either **intersection** or **union.**

```
"workflowGlobalConfig" : {
        "highPriorityFieldsFilterMethod" : "intersection"
        }
}
```

Conditional Field change

This can be used to hide, show field based on any field.

```
{
  "conditionalFieldChange" : {
        "hideCollapse" : false,
        "defaultFieldChange" : {
            "highPriorityFields" : [
                "plant"
            ]
        },
        "baseConditions" : [
            {
                "condition" : {
                    "and" : [
                        {
                            "==" : [
                                {
                                    "var" : "supportType"
                                },
                                "Engineering"
                            ]
                        }
                    ]
                },
                "highPriorityFields" : [
                    "when"
                ],
                "editableFields" : [
                    "supportType"
                ]
            },
            {
                "condition" : {
                    "and" : [
                        {
                            "==" : [
                                {
                                    "var" : "type"
                                },
                                "Man"
                            ]
                        },
                        {
                            "==" : [
                                {
                                    "var" : "priority"
                                },
                                "Low 2"
                            ]
                        }
                    ]
                },
                "highPriorityFields" : [
                    "when",
                    "media"
                ],
                "editableFields" : [
                    "comment",
                    "function"
                ]
            }
        ]
    }
}
```

Subtasks

```
{
  "subTask" : {
        "isEnabled" : true,
        "titles" : {
            "name" : "Project",
            "createButtonTitle" : "Create a project",
            "currentSubtaskListButtonTitle" : "Projects"
        },
        "workflowId" : "62204c862baad78ea560f324",
    }
}
```

Sub task sort

```
{
    "subTask" : {

        "sort" : [
            {
                "fieldId" : "dueDate",
                "name" : "Due date asc"
            },
            {
                "fieldId" : "dueDate",
                "name" : "Due date desc",
                "order" : "desc"
            },
            {
                "fieldId" : "status",
                "name" : "Status asc"
            }
        ]
    }
}
```

Sub task conditional style

```
{
    "subTask" : {

        "conditionalStyleChange" : [
            {
                "condition" : {
                    "and" : [
                        {
                            "<" : [
                                {
                                    "Date.parse" : {
                                        "var" : "dueDate"
                                    }
                                },
                                {
                                    "Date.parse" : "$$currentTime$$"
                                }
                            ]
                        },
                        {
                            "!=" : [
                                {
                                    "var" : "status"
                                },
                                "done"
                            ]
                        }
                    ]
                },
                "style" : {
                    "border" : "1px solid red"
                }
            }
        ]
    }
}
```

Visible Fields

```
{
    "subTask" : {
        "visibleFields" : [
            "dueDate"
        ]
}
```

Subtask Creation with Configurable Field Mapping

This feature enables **automatic field population** in subtask creation form based on parent incident data, reducing manual input and ensuring consistency.

1) **Field Mapping** – Auto-fills subtask fields from the parent workflow.

```
{
    "subTask" : {
       "mapping" : [
           {
               "field" : "summary",
               "targetField" : "summary",
               "fieldPrefix" : "This is the start"
           }
       ]
    }
}
```

2) **Default Values** – Assigns predefined values

```
{
    "subTask" : {
      "defaultValues" : [
           {
               "field" : "status",
               "value" : "Open"
           },
           {
               "field" : "type",
               "value" : "Bug"
           }
        ]
    }
}
```

3) **Dynamic Placeholders** – Uses placeholders like "Task from {type}" for automatic text generation.

```
{
    "subTask" : {
      "placeholderValues" : [
            {
                "field" : "name",
                "value" : "Task from $$type$$"
            },
            {
                "field" : "description",
                "value" : "This is a description for $$type$$"
            }
        ]
    }
}
```

4) **Field Visibility** – Allows fields to be hidden in the form

```
{
    "subTask" : {
     "hiddenFields" : [
            "type",
            "status",
            "priority"
        ]
    }
}
```

Showing Custom Title for Subtask Title

A different field value can be displayed as the subtask name. To achieve this, the **key of the field** from the **subtask workflow configuration** must be set as the titleField in the **parent workflow configuration.** The value of this field will then be shown as the subtask name in the **parent workflow's incident screen**.

```
{
    "subTask" :
    {
       "titleField" : "summary"
    }
}
```

Export

```
"export" : {
        "unwind" : true,
        "unwindValue" : "visitors",
        "excludeFields" : [
            "description",
            "visitors.visitorEmail"
        ],
        "renameFields" : [
            {
                "id" : "incidentKey",
                "name" : "Ref"
            }
        ]
    }
```

Email /SMS Placeholders

Placeholder	Description
$incident_assigneeName$	Current assignee name
$incident_previousAssigneeName$	Previous assignee name
$incident_previousAssigneeEmail$	Previous assignee email
$incident_updatedByName$	Name of the person who updated the incident. This will get based on the current logged in user email
$incident_updatedByEmail$	Name of the person who is updated the incident.This will get based on the current logged in user email
$incident_id$	Unique identifier used by the system.(Ex - 6185230ea1fc0d0038adee5c)
$incident_companyId$	Company Id belong to incident
$incident_number$	Human readable incident number (123)
$incident_created_date$	Incident created date
$incident_description$	Description of the incident
$incident_type$	Type of the incident
$incident_status$	Status of the incident
$incident_priority$	Priority of the incident
$client_name$	Name of the person who is created the incident
$client_email$	Email of the person who is created the incident
$client_telephone$	Telephone of the person who is created the

	incident
$incident_newVal$	This will hold a new value when someone change the incident property value one to another (Ex - If user change status from Open to In progress this can be use to show In progress in the template)
$incident_oldVal$	This will hold a old value when someone change the incident property value one to another (Ex - If user change status from Open to In progress this can be use to show “Open” status in the template)
$incident_updatedField$	Field Name which is updated
$incident_name$	Name of the incident
$workflow_id$	Unique workflow identifier
$emoSignature_<key>$	If you want to show emo signature data in a template this placeholder can be used. (Ex - to show Customer emo signature use $emoSignature_Customer$)
$incident_customFields_<fieldId>$	This can be use to show custom field value in the template. Use property id in the placeholder(Ex - $incident_customFields_supportType$)
$incident_comment_status_current $	
$incident_comment_status_<statusid>$	This can be used to append comment based on the status.If you want to add comment added when the incident is on Open status use tis as $incident_comment_status_open$
$incident_lastComment$	Last comment of the incident
$emoSignature_Hospital$	Add emo signature data

showFileUrl	
"objectListPlaceholder": true,	

$incidentURL$	Append Edit URL to Incident

Resources / Code Samples

Json Logics

Doc - https://jsonlogic.com/

and/or conditions

```
{
    "and" : [
        {
            "!=" : [
                {
                    "var" : "status"
                },
                "Closed"
            ]
        },
        {
            "==" : [
                {
                    "var" : "priority"
                },
                "Top Priority"
            ]
        }
    ]
}
```

Date Parse

```
{
    "and" : [
        {
            "<" : [
                {
                    "Date.parse" : {
                        "var" : "plannedDate"
                    }
                },
                {
                    "Date.parse" : "$$currentTime$$"
                }
            ]
        },
        {
            "==" : [
                {
                    "var" : "priority"
                },
                "Highest"
            ]
        }
    ]
}
```

Evaluation / Calculation

```
{
     "-" : [
                   {
                       "var" : "resolveTime"
```

```
                                },
                                {
                                    "var" : "timeStamp"
                                }
                            ]
             }
```

Engagement Placeholders

Comment	$$gp9807_c1_comment_text$$ is $$gp9807_c1_comment_value$$
Emote	$$q2412_emote$$
Media	$$mediafile_p196$$
Emo Signature	$$emoSignature_Main Contact Name_value$$

Load Edit Page Directly

https://emojot.com/emojotDashboard/samlsso?redirectPage=reports/incidentManagement/incidentEdit.jsp&incidentID=$incident_id$&workflowID=$workflow_id$&trimOut=true&unmask=true&companyID=$incident_companyId$

Admin Query

```
let q = {
  "condition": "and",
  "rules": [
    {
      "field": "factory",
      "operator": "eq",
      "value": "$factory$"
    },
    {
      "condition": "or",
      "rules": [
        {
          "field": "responsibleFunction",
          "operator": "in",
          "value": "$owners$"
        }
      ]
    }
  ]
};
```