Template Applications – New Customer Request

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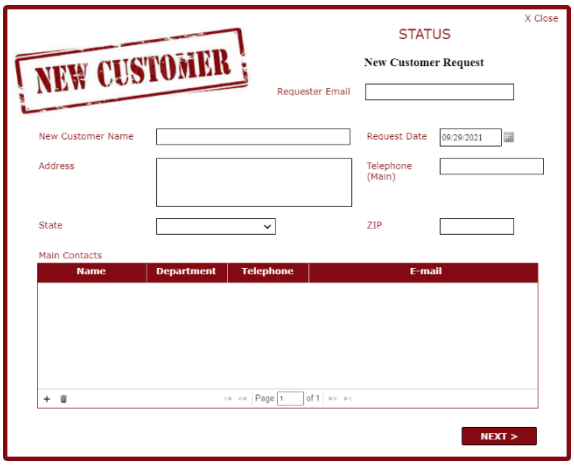
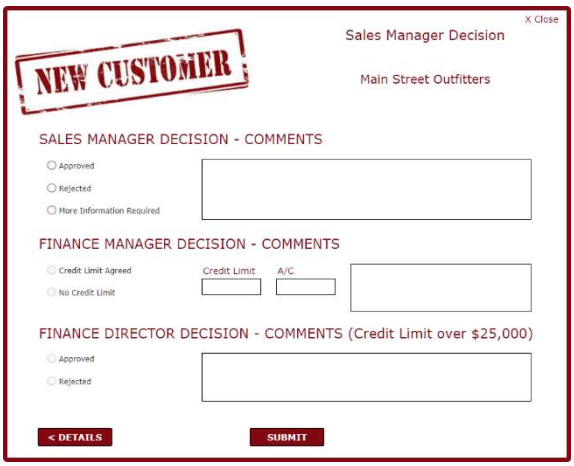
Template Applications – New Customer Request

Introduction

This application contains three pages to manage requests to accept a new customer.
The first two pages capture the data needed to make the request, and the third is for approval.





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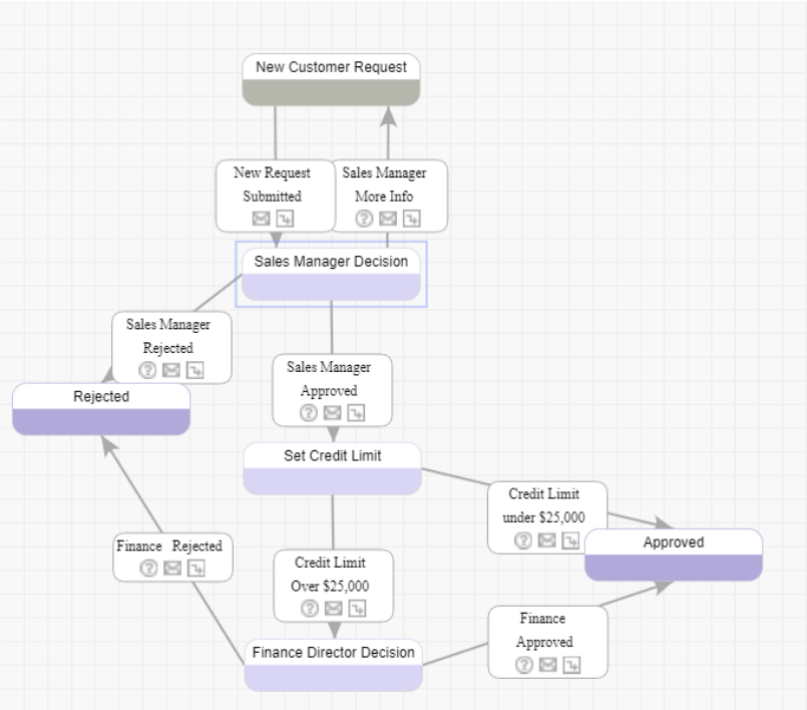
Workflow Logic

The Sales Manager will make the first decision and may send the request back for more information. If approved, a request moves to the Finance person or team to set a credit limit. The finance director must agree if the credit limit is above a specific value ($25,000 in this example).
The Sales Manager and Finance Director may reject a request.



Notable Behaviors

The current status is displayed on the first page and copied onto the other pages.
The customer name is entered on the first page and copied onto the other pages.

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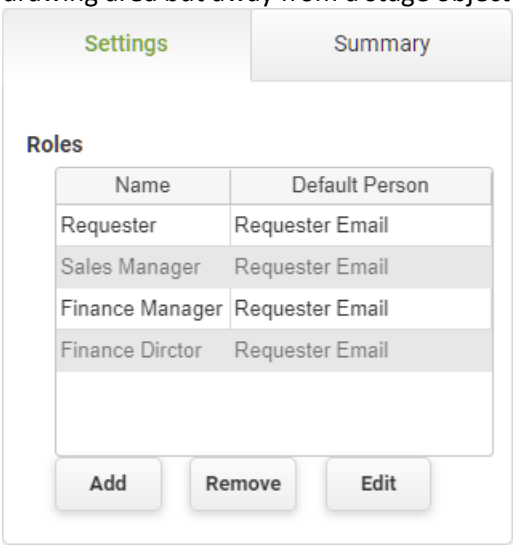
Installation Instructions

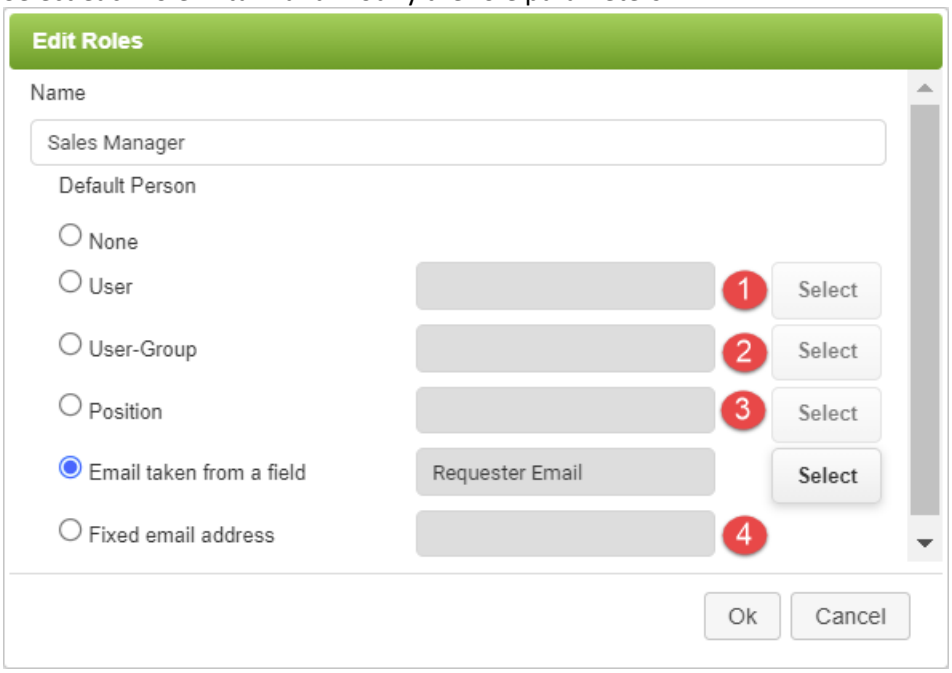
The application is designed in demonstration mode.

In normal circumstances, the Sales Manager, Finance Team, and Finance Director roles are occupied by the same person or team, so it's not necessary to identify them in the application. Still, these roles can be linked directly to a user in your system or a specific e-mail address.
All roles link to the Requester e-mail field in demonstration mode, but this will need to change before publication in your system.

Open the workflow diagram and select the workflow properties by clicking in the background of the drawing area but away from a stage object or pathway. Look for the Roles section.



Select each role in turn and modify the role parameters.



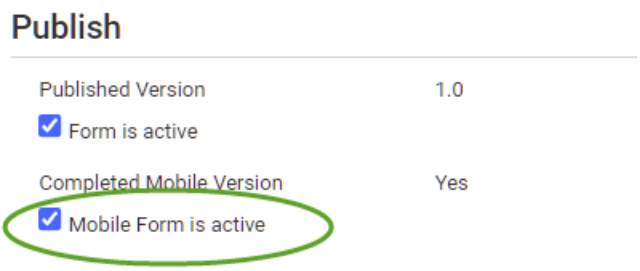
1. If your user is an individual and has a license in your account (Full, basic or limited), you can link directly using the User option. Select the 'User' option, click the corresponding Select button, and choose from the user list.
2. If your user, most likely the Finance Team role, will be part of a group responsible for managing these requests, and that user group exists within your system, you can link to that user group. Select the 'User-Group' option, click the corresponding Select button, and choose from the list of groups.
3. If you have a position within your system for any of these roles and have selected the licensed user appropriately, you can link to that position. Select the 'Position' option, click the corresponding Select button, and choose from the position list.
4. You can link to the user's e-mail address if none of the above is possible. In this scenario, the user doesn't require a license (Full, basic, or limited) in your system. Select the 'Fixed e-mail address' option and enter the e-mail address in the corresponding box.

Click OK when done.

Mobile Version

This application is enhanced for mobile use.

If you have the mobile version license and want to utilize the feature for this application, please make sure that you check the option to make the Mobile version active after importing the application.



Note: If you choose not to utilize this feature after import, you will be prompted again when you publish the application.