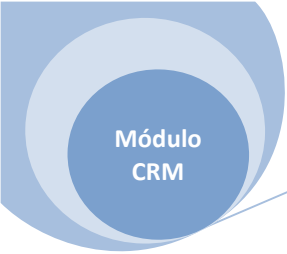# Article - Blog Módulo CRM

Version

This article was created by SAP C4C (1611) Version

Brief Description

The objective of this article is talk about the a very nice SAP C4C feature. It is Workflow Rules. With it, is possible to trigger events on SAP C4C.

Author

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Email: claudio.goulart@modulocrm.com.br   Page 1   **Blog - Módulo CRM**
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## Content

1. Customization

1.1. Description

With Workflow Rules is possible to trigger events based in others events started by users or developments, Those events consist in Notifications, field updates, messaging and others. On this article, we are explaining everything about this SAP C4C functionality.

I hope you enjoy!!

1.2. Business Objects (Lead)

On Workflow is possible to create rules to a sufficient list of objects in C4C. And then, in our article the object elected will be Leads. And to make things harder, I will create a Z Field and then create a rule to considerer this field. Let´s start!!
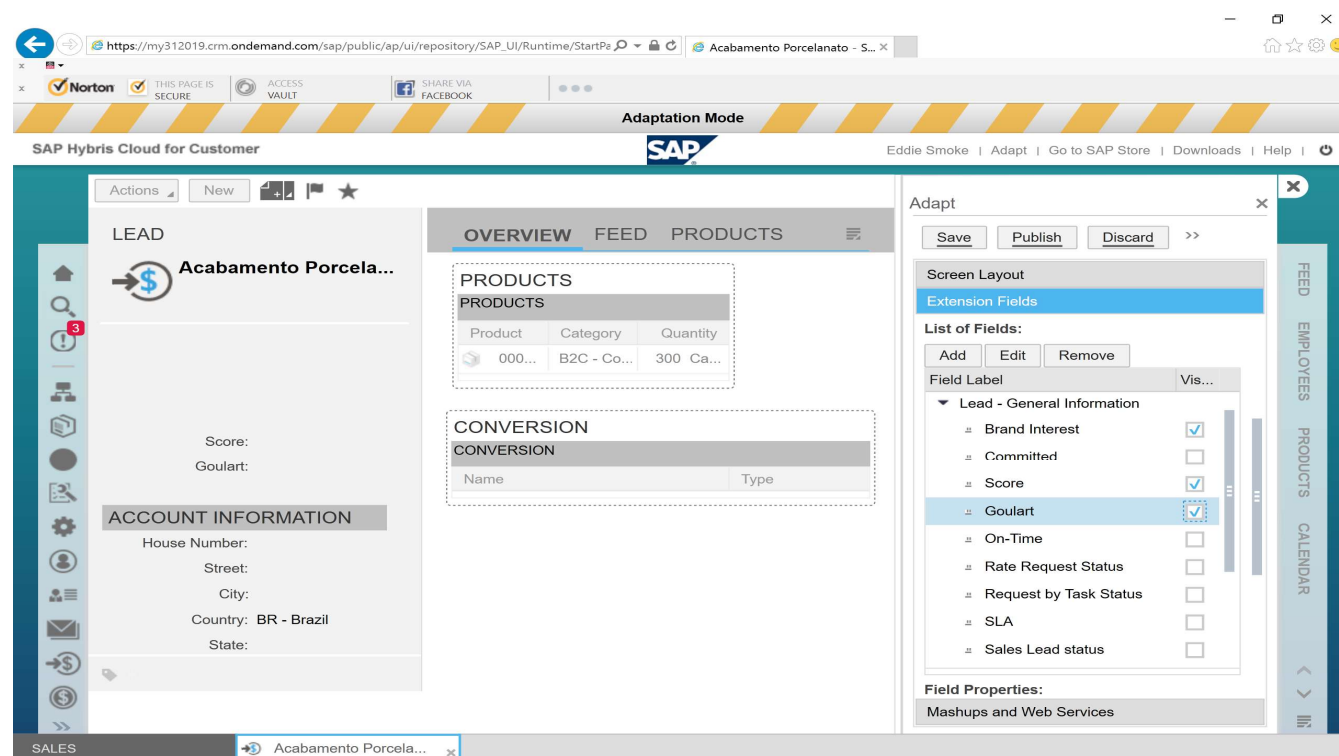
On Lead I, will create a Z Field.
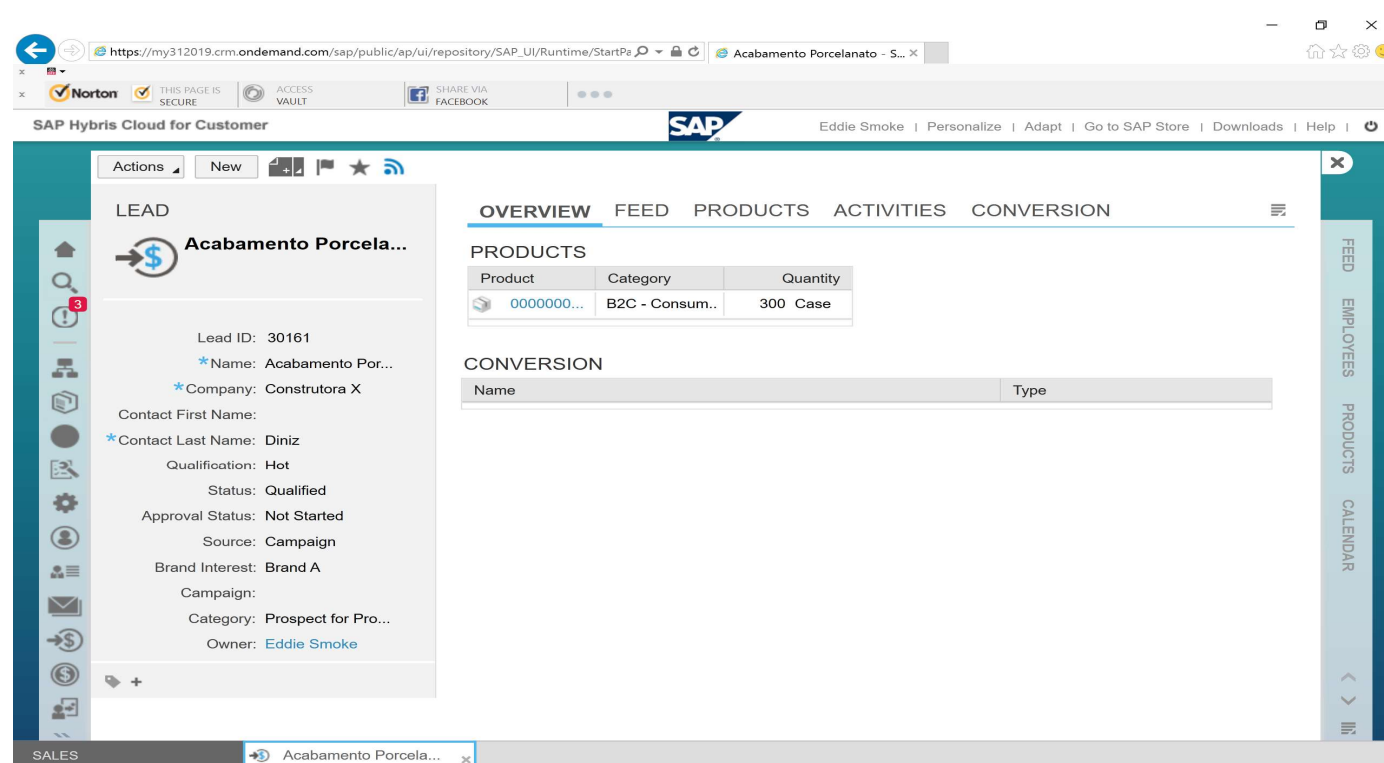
So, accessing the Adaptation mode, and then create a Z field, called "Goulart" to identify easily.
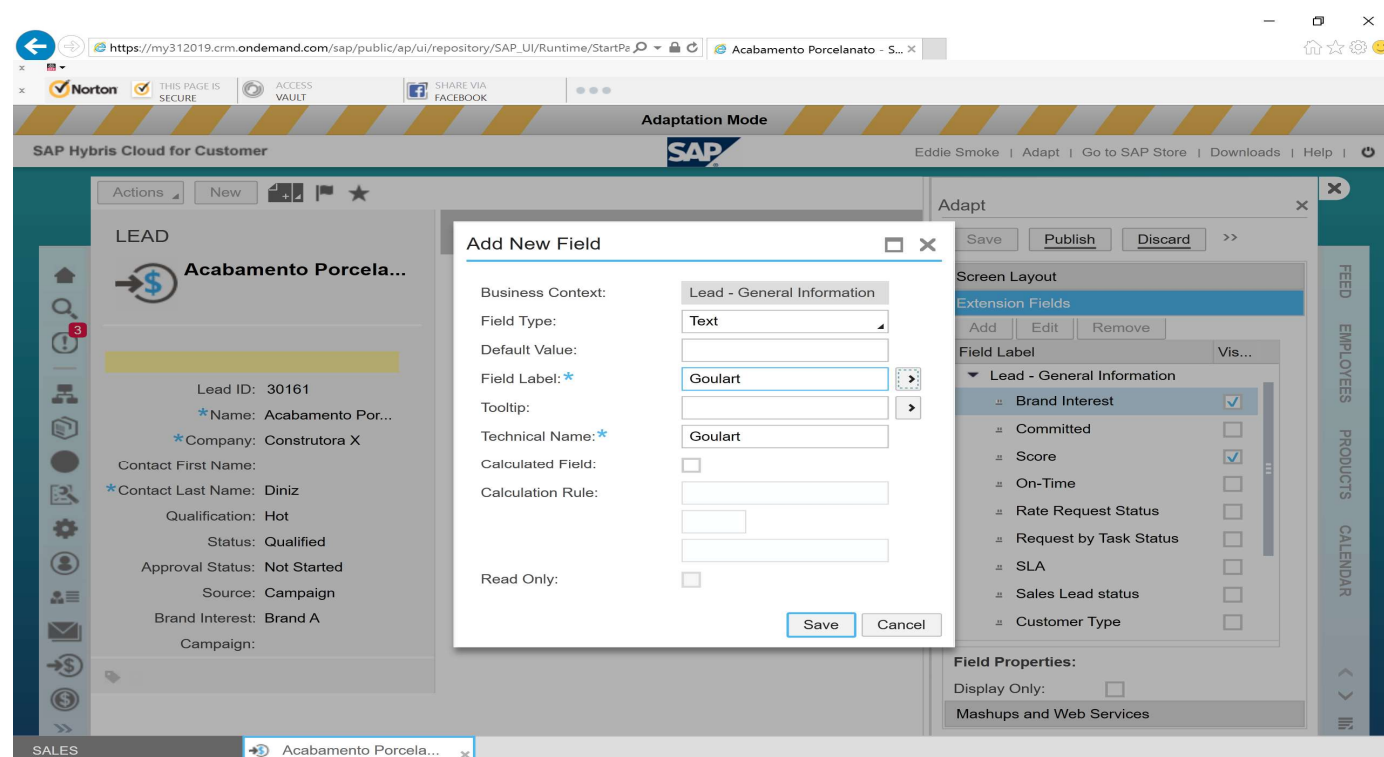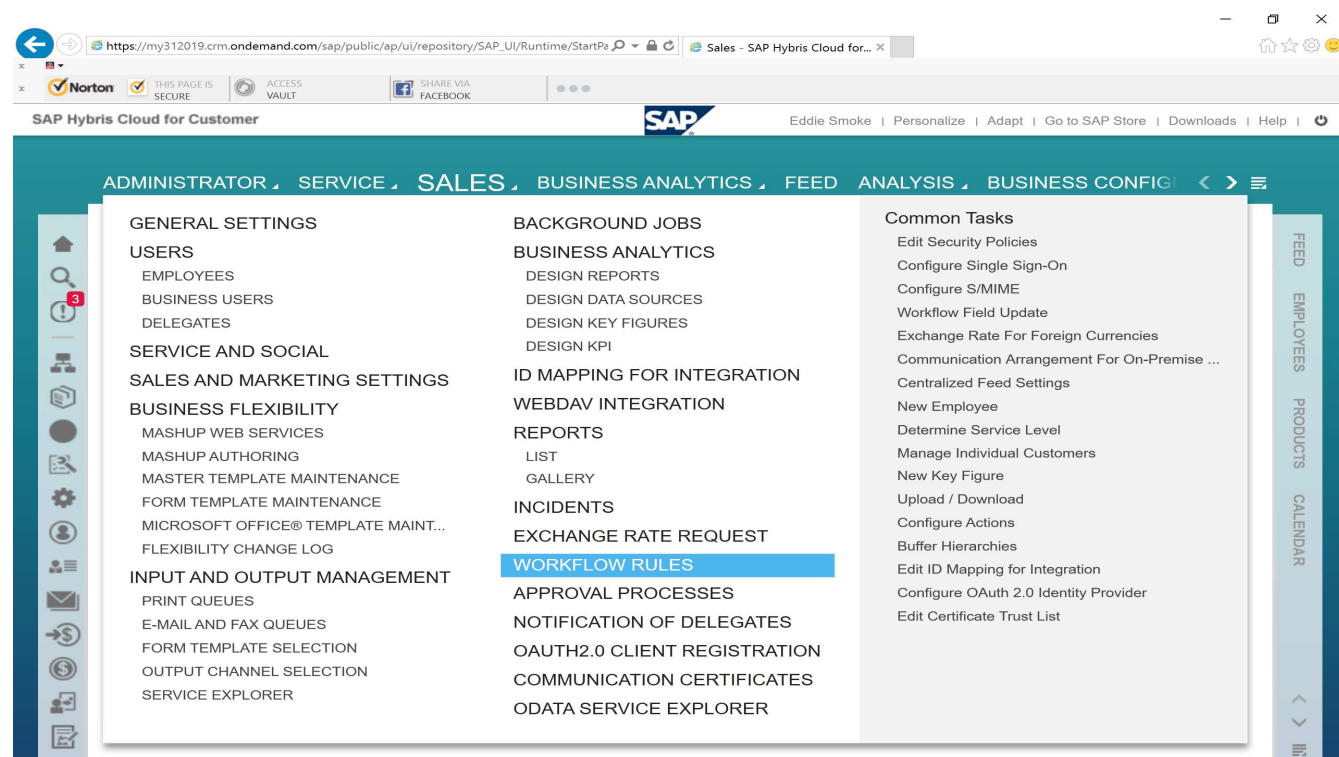
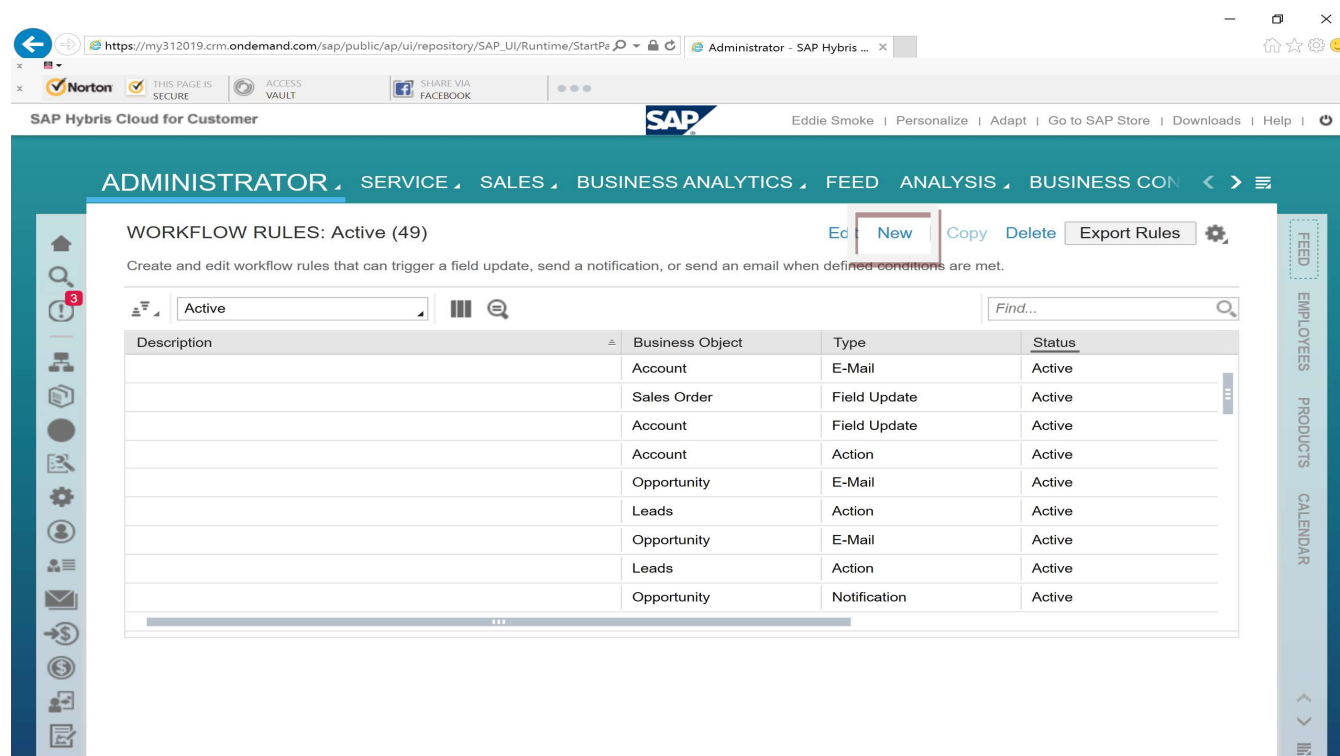Let´s make this field available on screen. That´s it!!
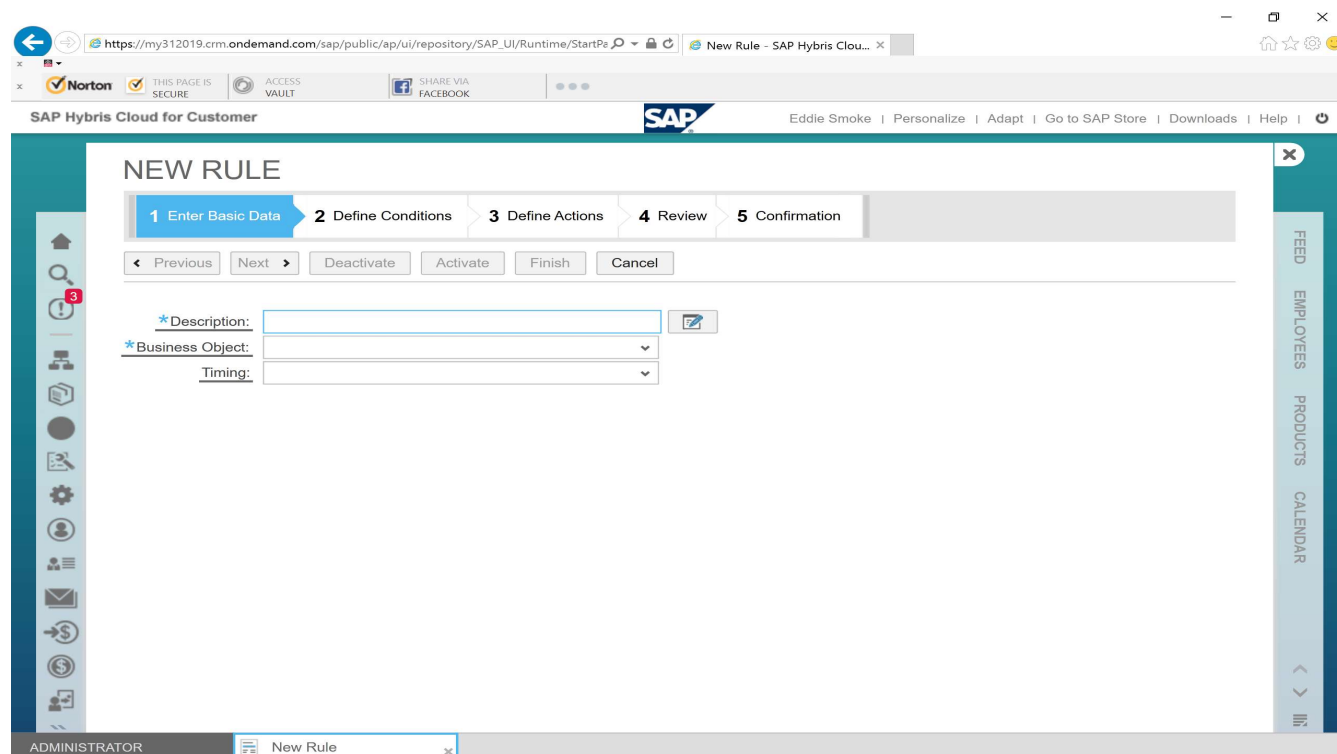

1.3.   Creating Workflow Rule

On this section, we will create a rule for our example. So, to do it, click on link Administrator and them Workflow Rules. As demonstrated below.
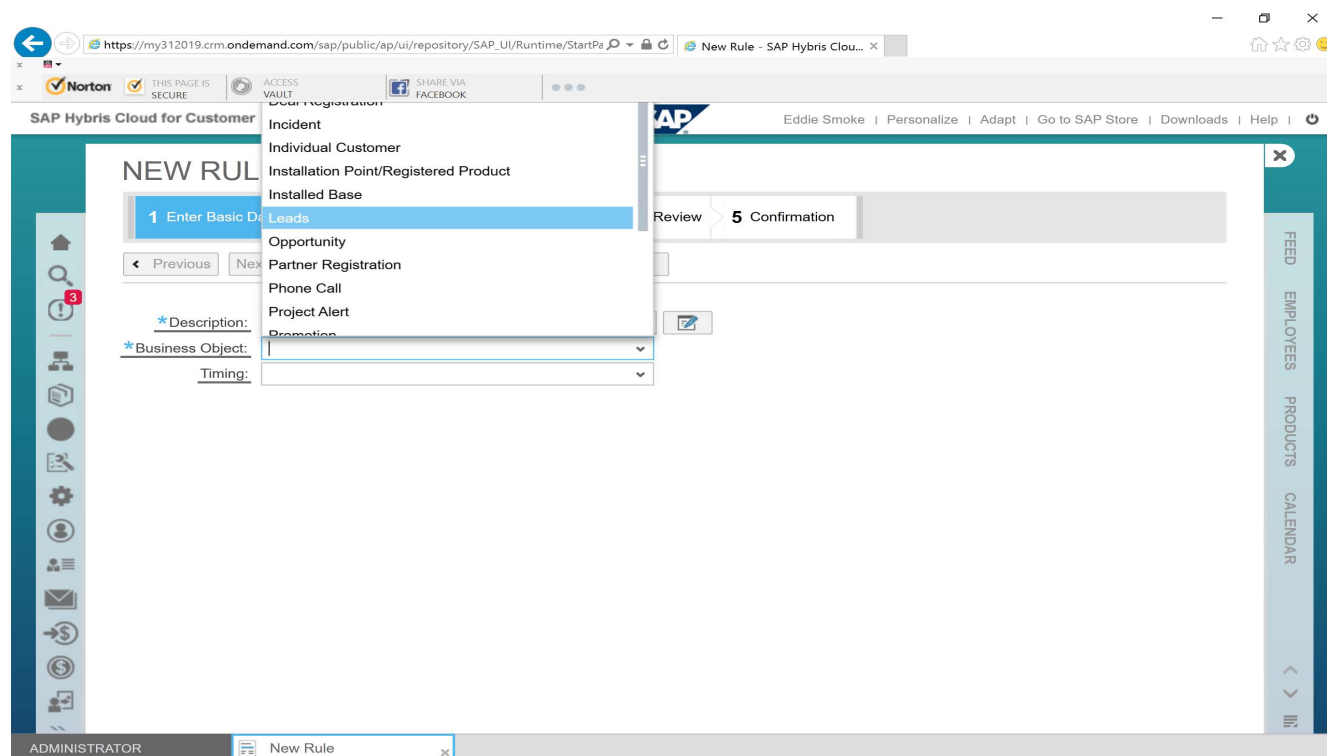
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Click on New Button.

Type a succinct description of your rule.

And then, select the business object desired, in our case will be "Lead".

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Now, let´s determine the timing of our rule execute. The timing items possible are:

➢ On Create Only
  The rule will be triggered only on creation event.
➢ On Every Save
  The rule will be triggered every save event
➢ Scheduled
  The rule will be triggered by time, scheduling to execute previous determination.
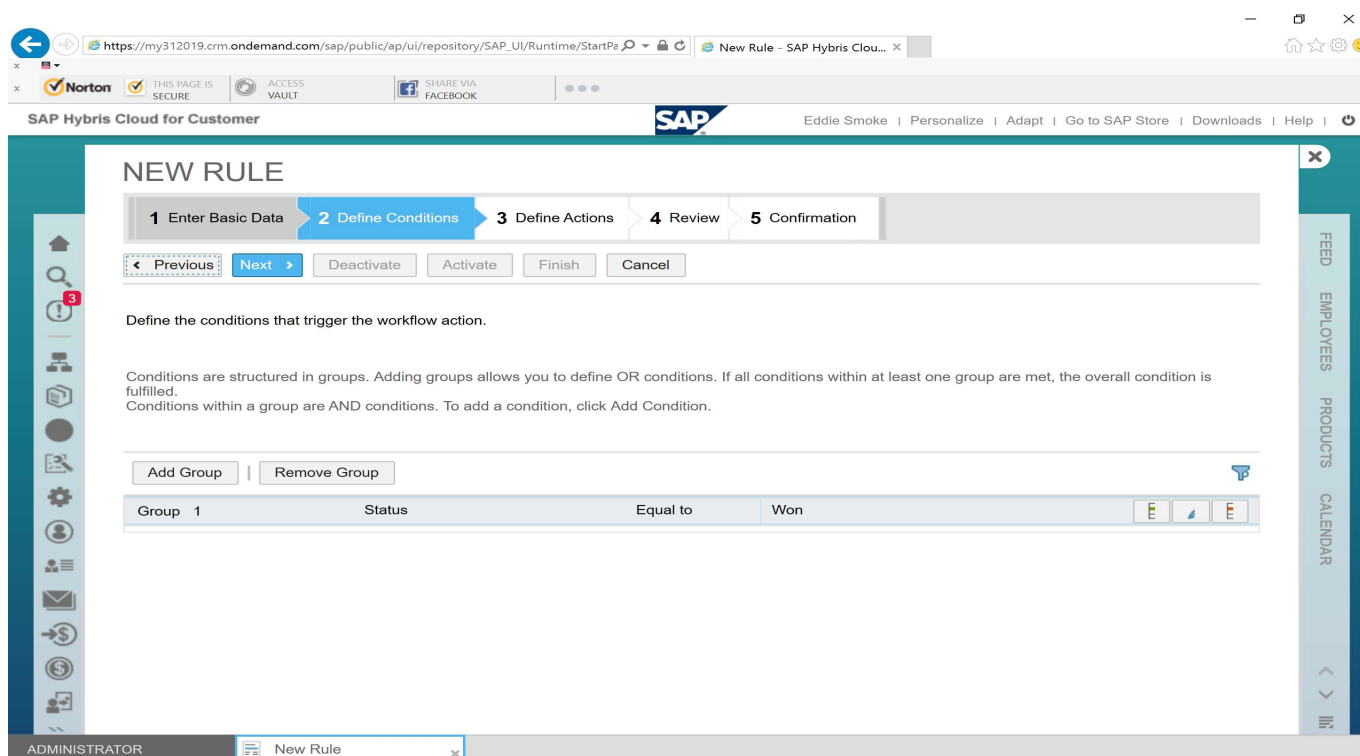
And Then Next
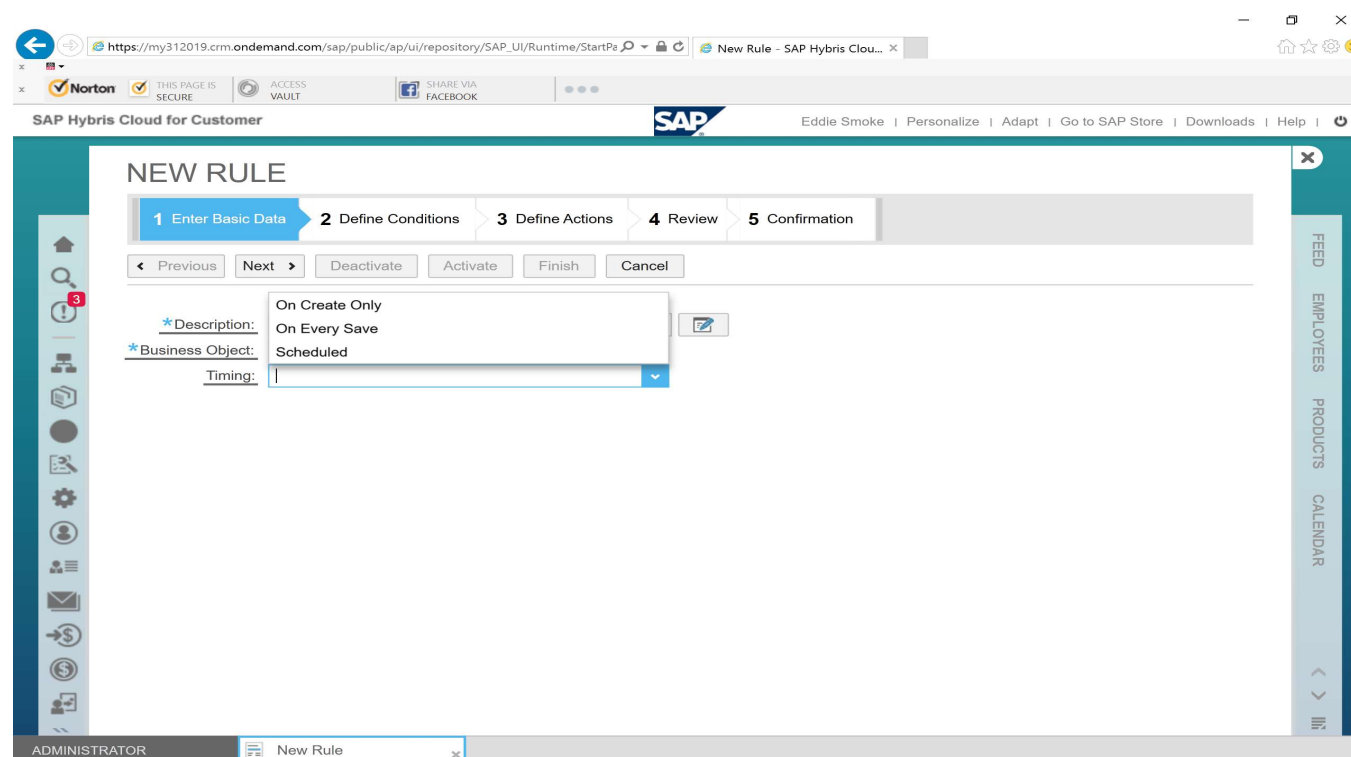
Right now, will be determined the condition of our rule. And by now, let´s determine that rule will be executed when status was set to "Won".
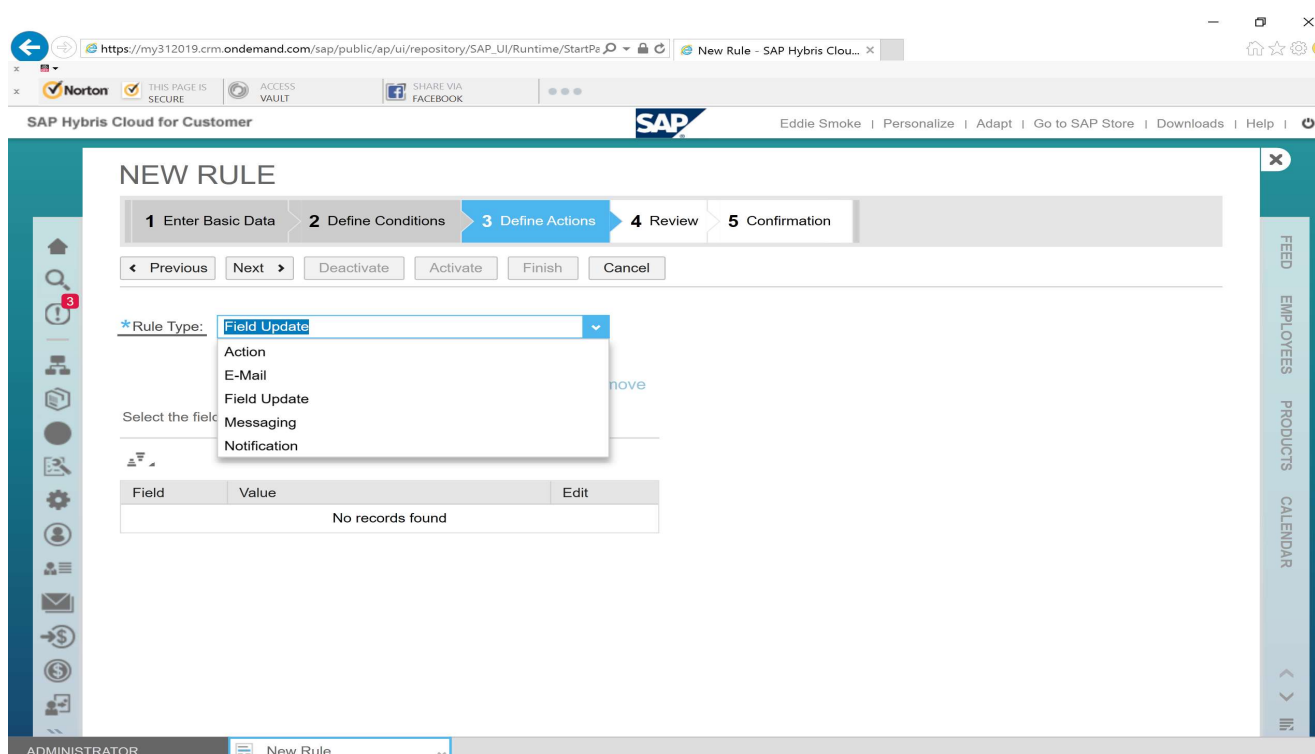
And then OK

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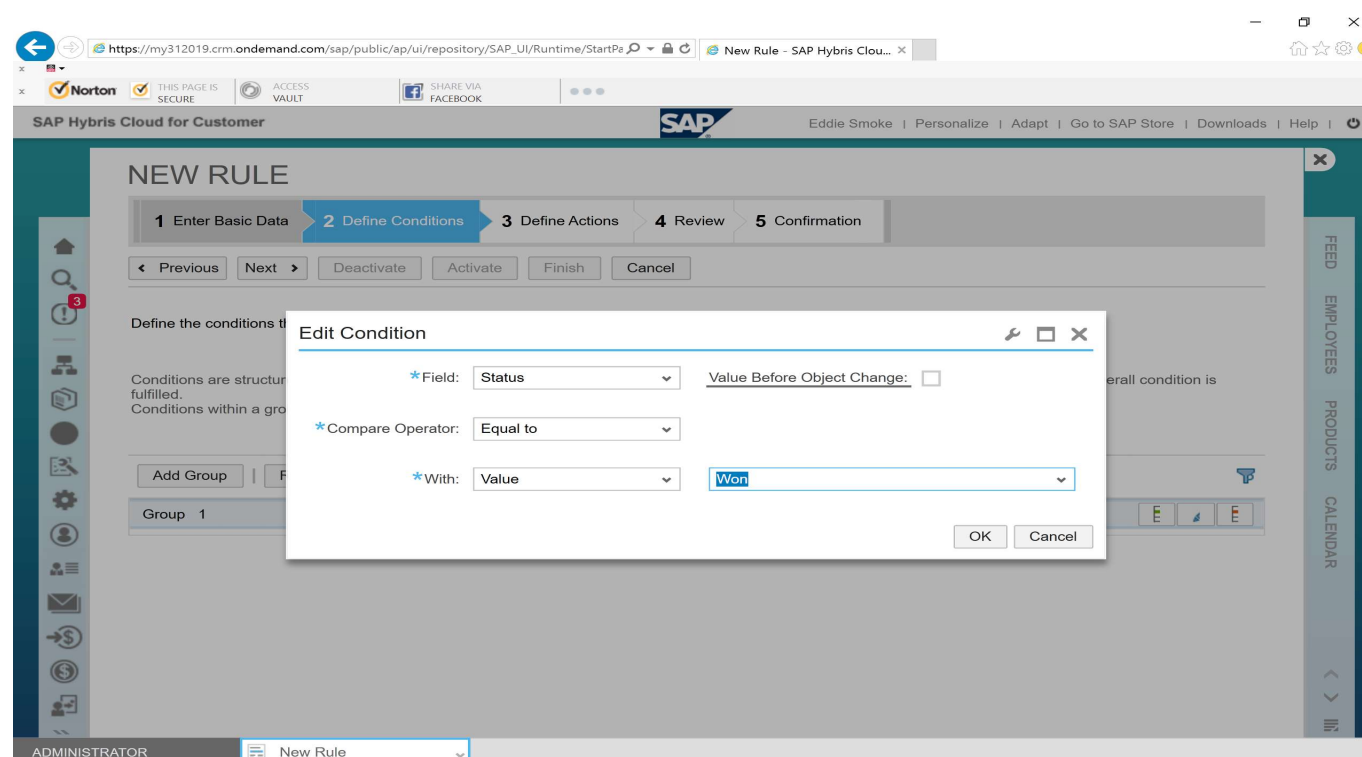
And then, click on Next button.

Right now, it´s necessary determine what´s the type of our rule.

- ➢ Action
  It´s possible to execute a standard Action or Z Action to automatize the process.
- ➢ E-mail
  On that option, it´s possible to send an e-mail to an employee, customer or a group of people
- ➢ Field Update
  It´s possible to update a standard field or Z Field
- ➢ Messaging
  It´s possible to send a messaging (SMS) to Customer, and create an activity on SAP C4C.
- ➢ Notification
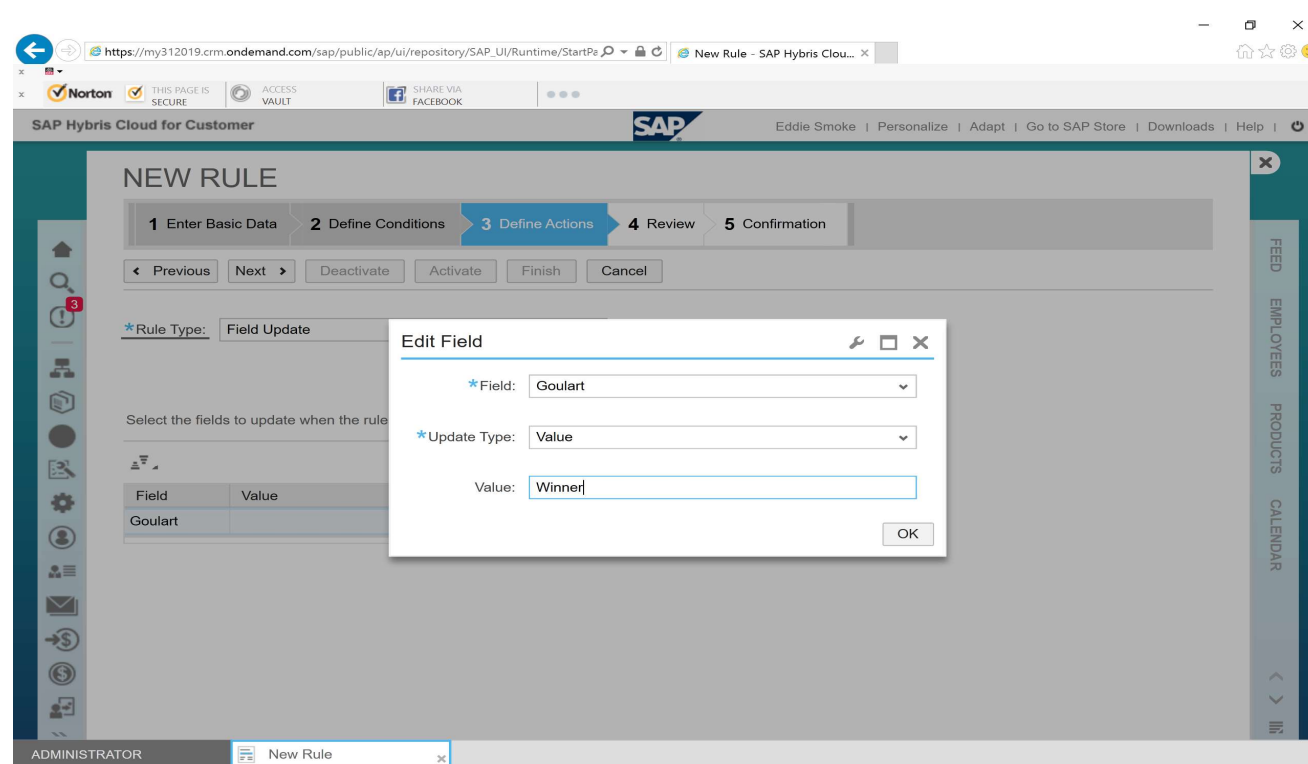 On Notification, will be possible to notify a user or a department about it.

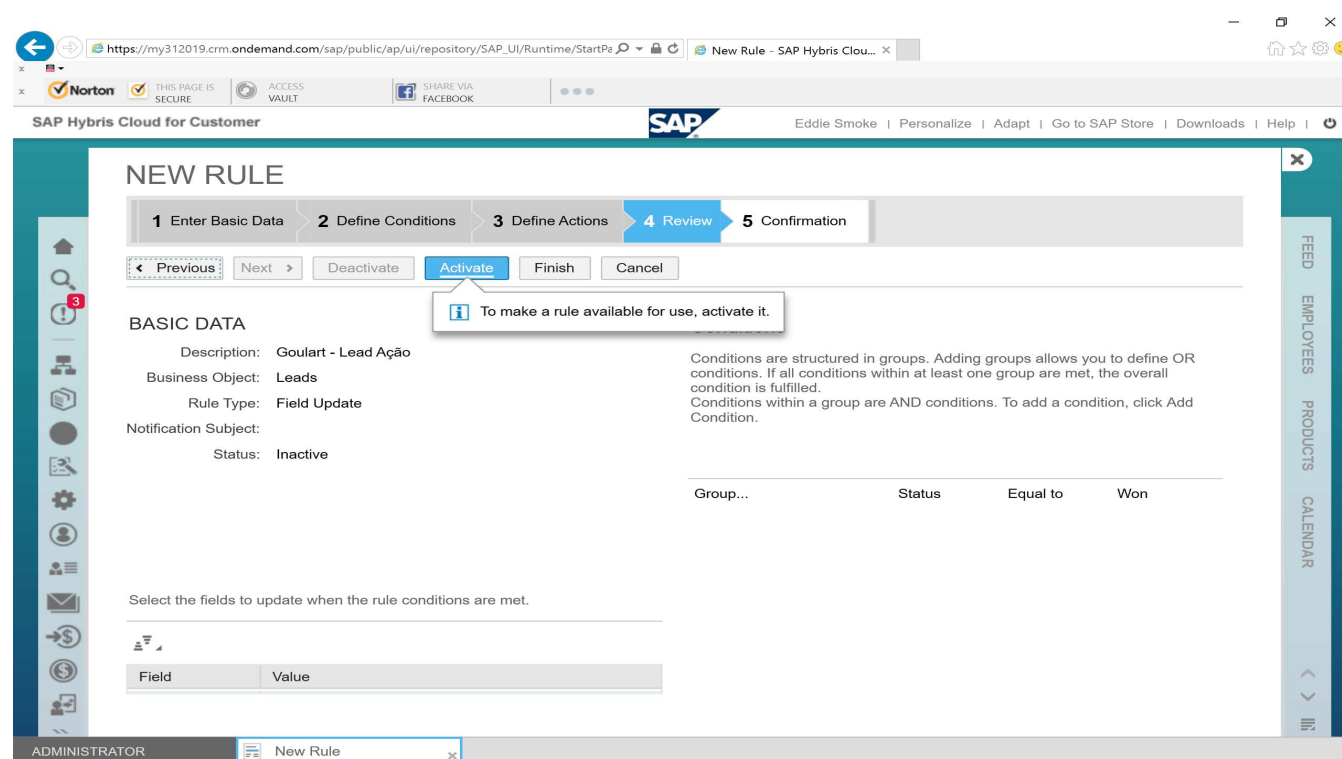To our example, I will select Field Update.

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Are u Remember our Z Field "Goulart"? That´s right!! Let´s use it.
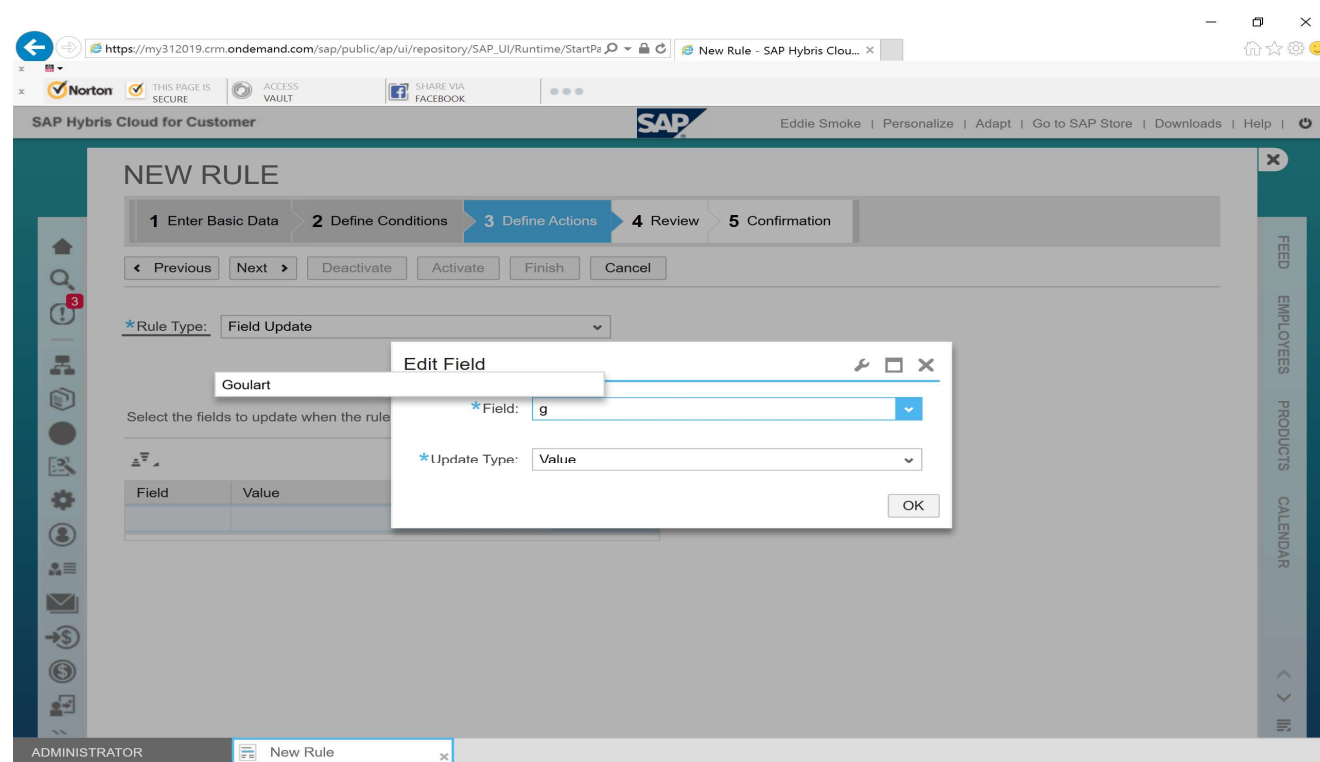
The objective is update Z field with "Winner" when Status is set by "Won".

And then Activate the rule, and finish it.

1.4. Test the Workflow Rule

So, let´s test our rule!!

Open a Lead record on SAP C4C and change the status to "Won".

And then Save the record

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The Z Field "Goulart" was change to "Winner".
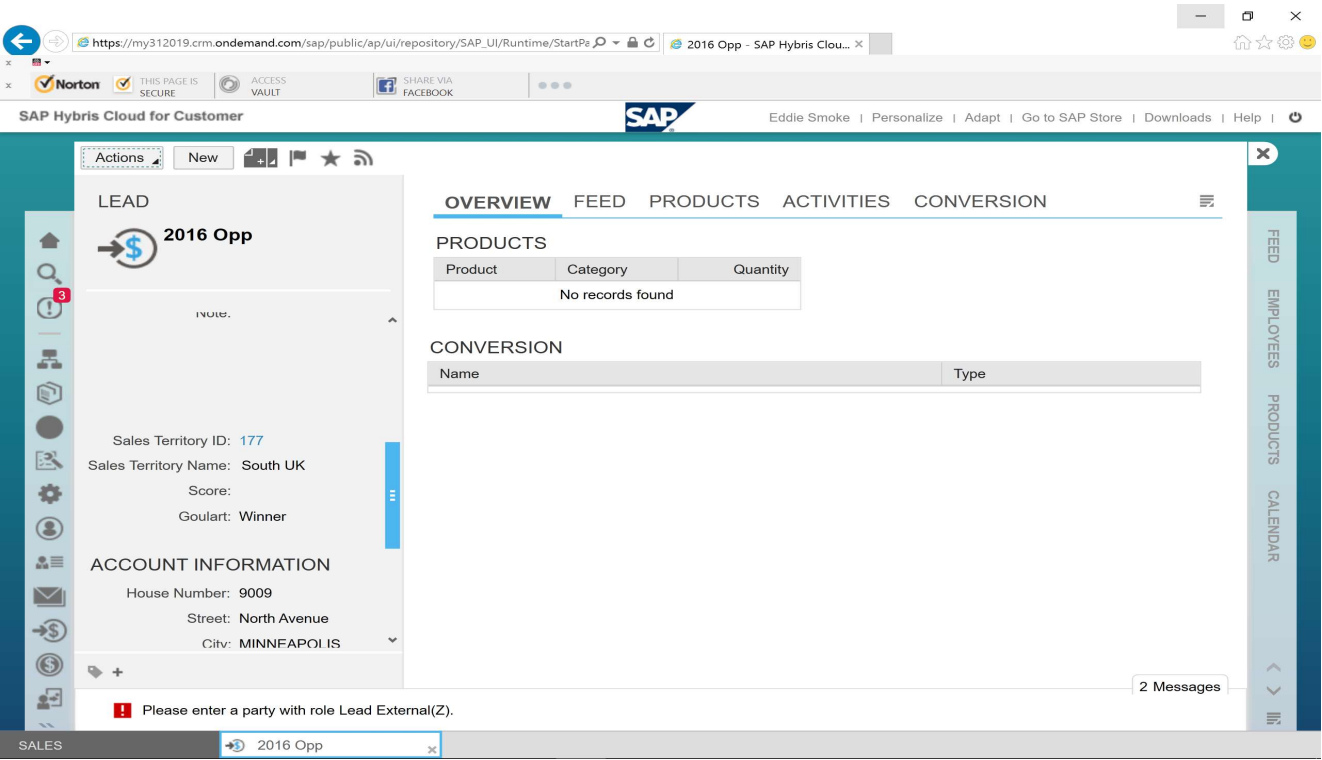
That´s it guys, it´s easy!! Isn´t it??

Our example is easy, but there are many possibilities to project implementation, and of course save development time.

I hope you enjoy!!