

## Version

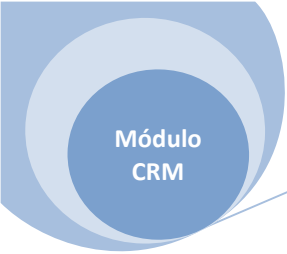
This article was created by SAP C4C (1611) Version

## 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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# Article - Blog Módulo CRM

[Customization Guide - SAP C4C](#)

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## 1. Customization

### 1.1. Description

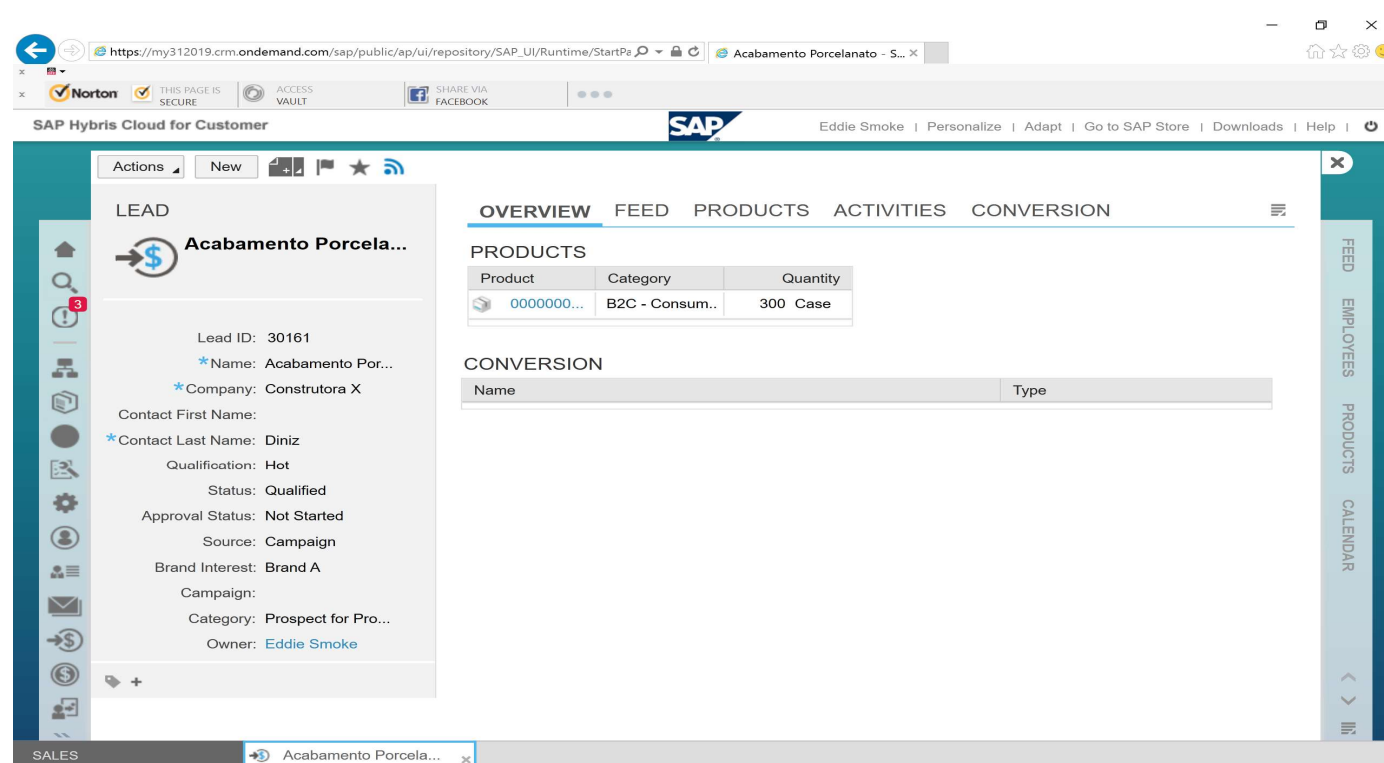
With Workflow Rules is possible to trigger events based in others events started by users or developments, Those events consist in Notifications, field updates, messaging and others. On this article, we are explaining everything about this SAP C4C functionality.

I hope you enjoy!!

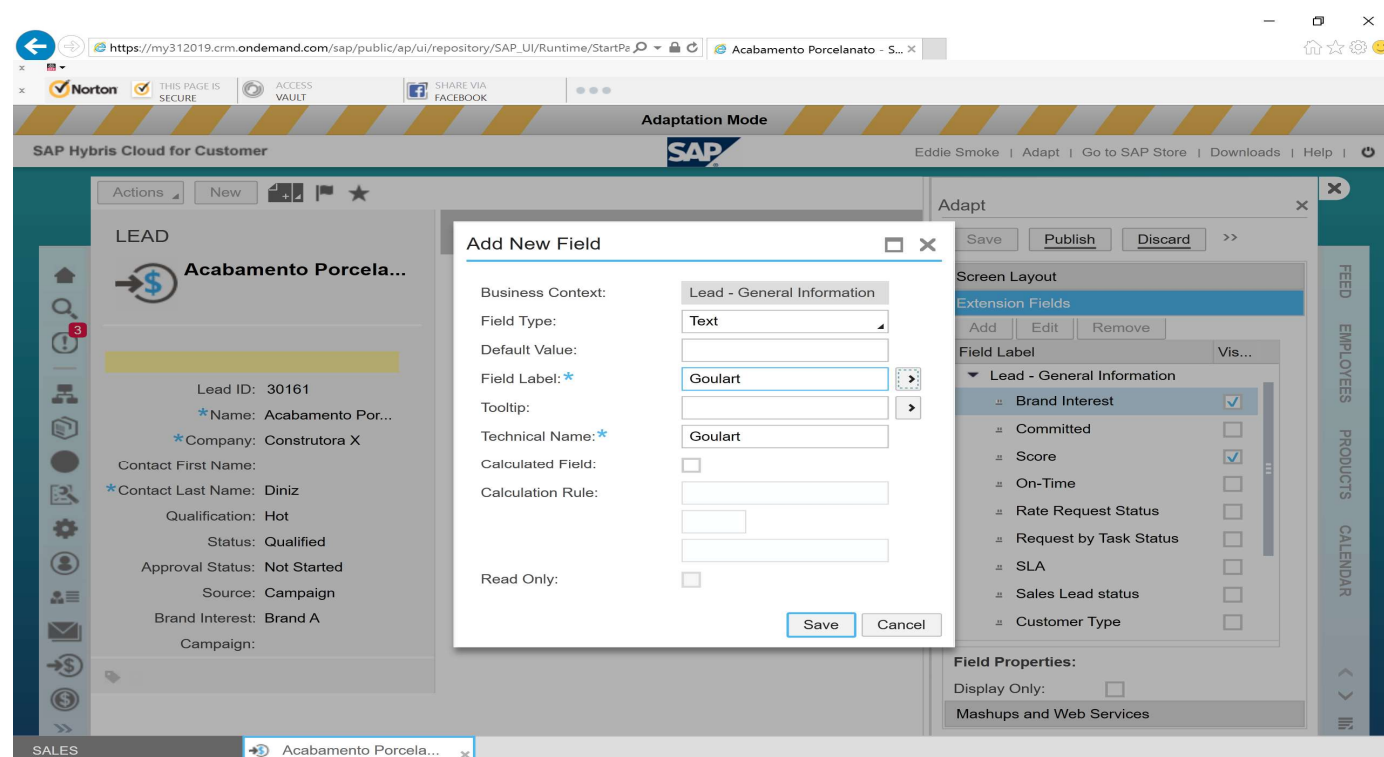
### 1.2. Business Objects (Lead)

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!!

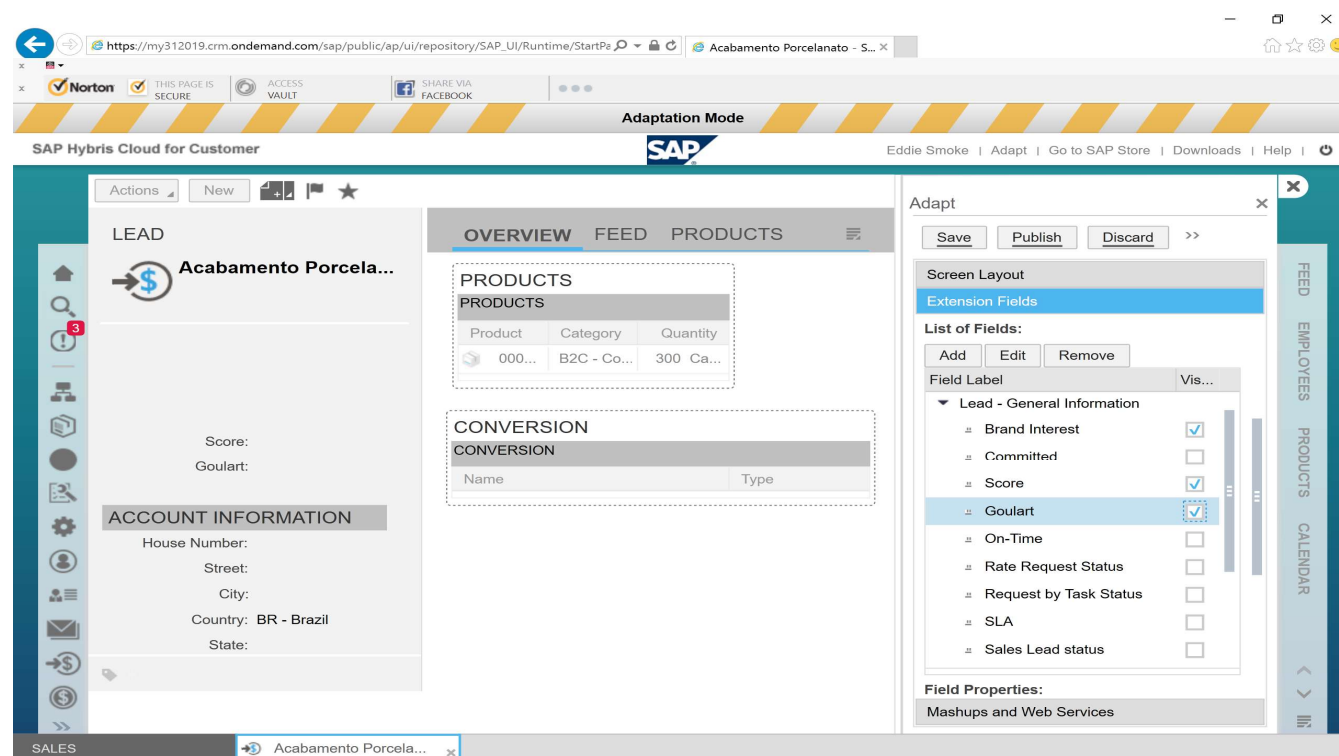
On Lead I, will create a Z Field.



So, accessing the Adaptation mode, and then create a Z field, called "Goulart" to identify easily.

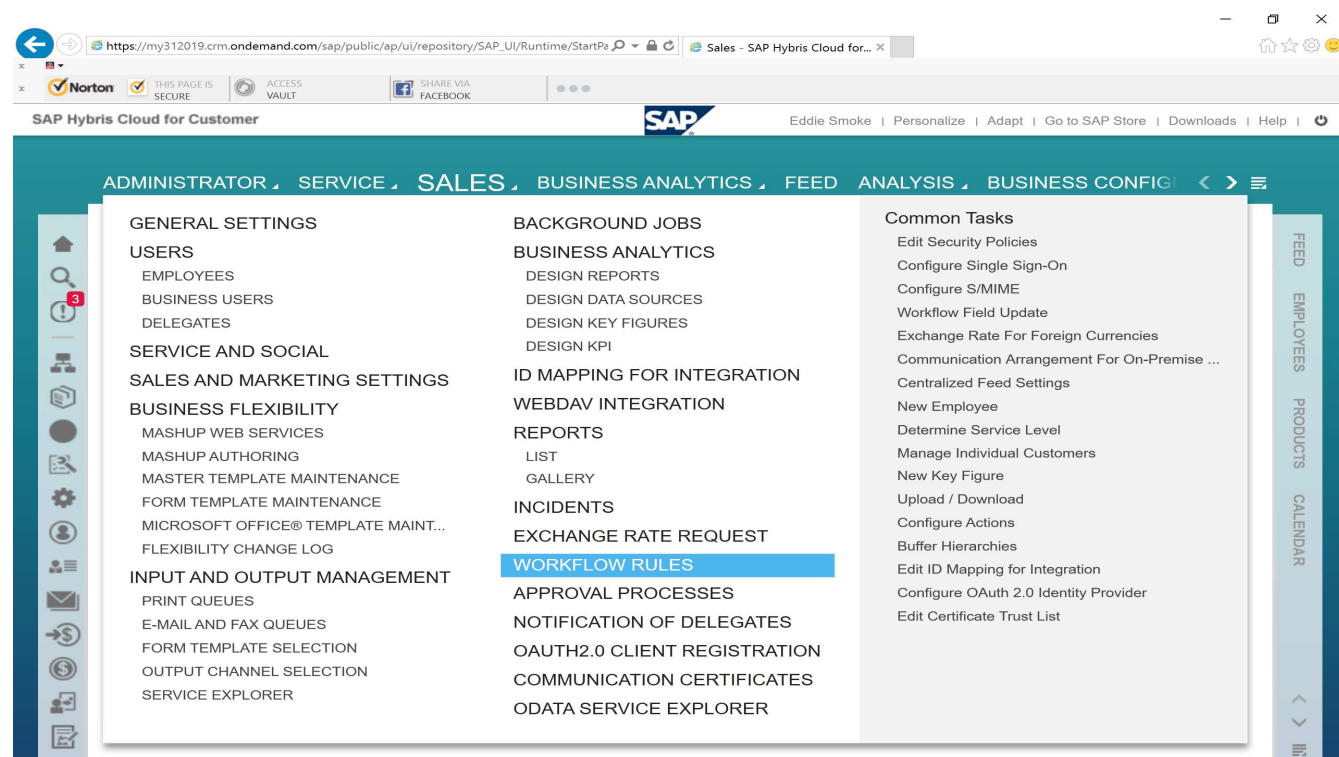


Let's make this field available on screen. That's it!!

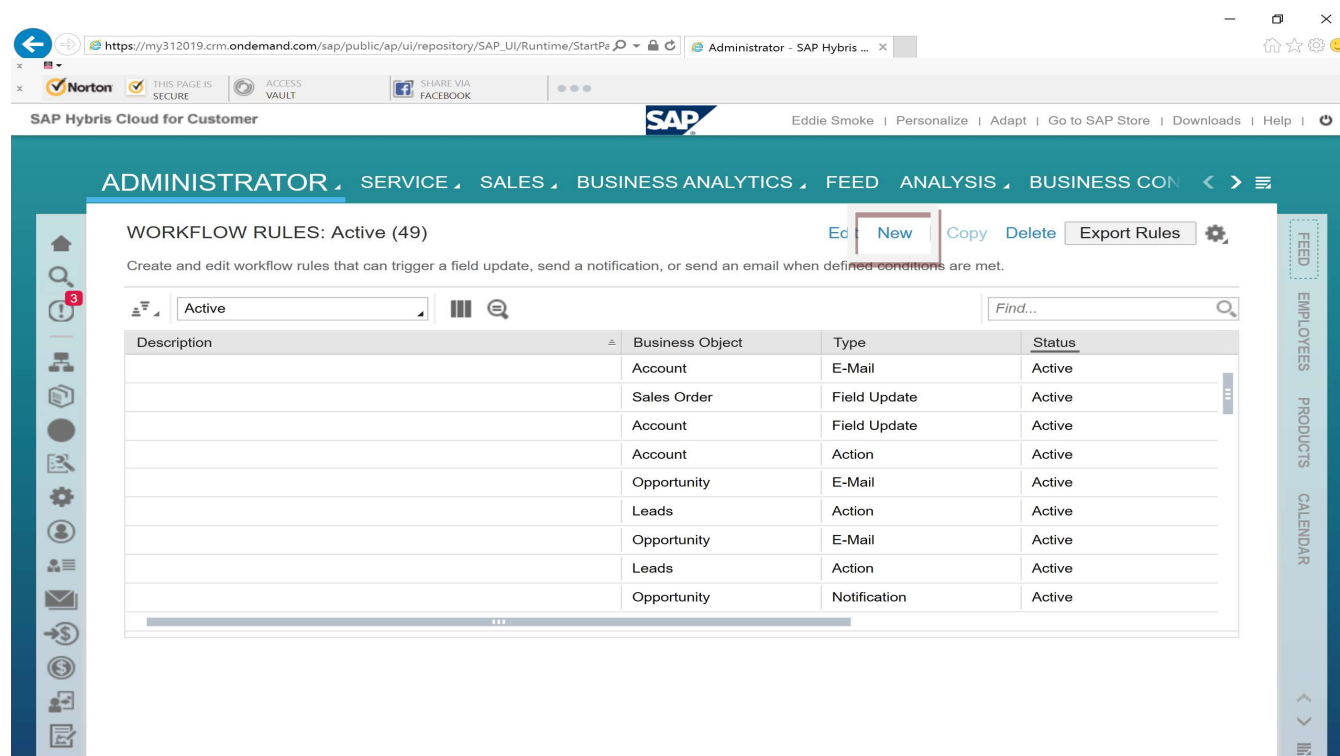


## 1.3. Creating Workflow Rule

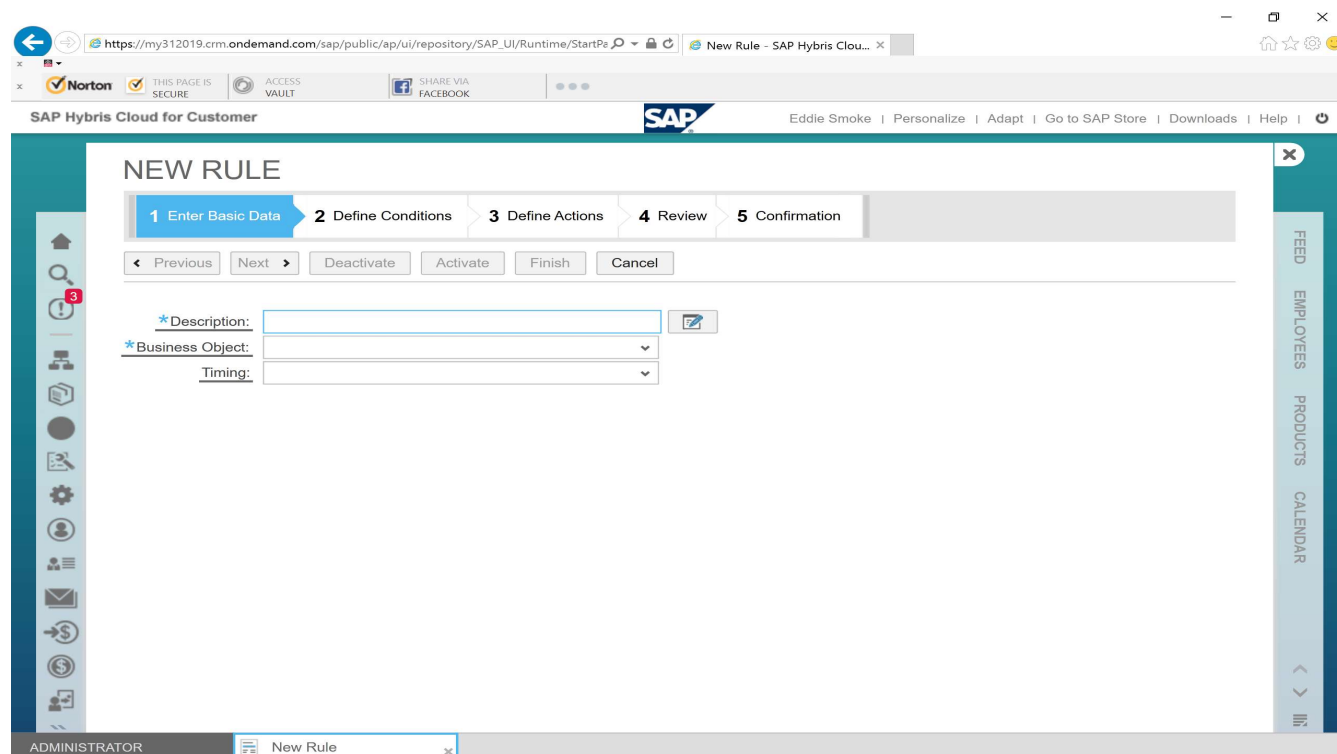
On this section, we will create a rule for our example. So, to do it, click on link Administrator and then Workflow Rules. As demonstrated below.



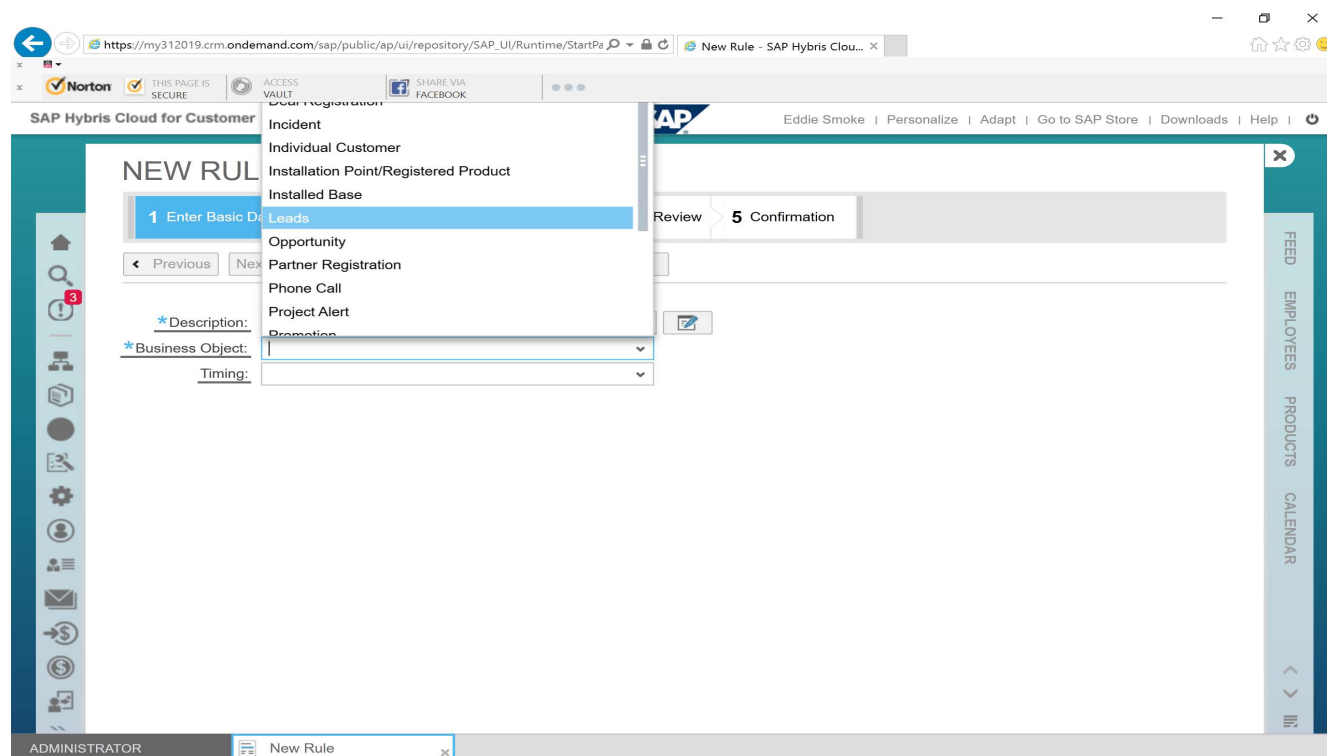
Click on New Button.



Type a succinct description of your rule.



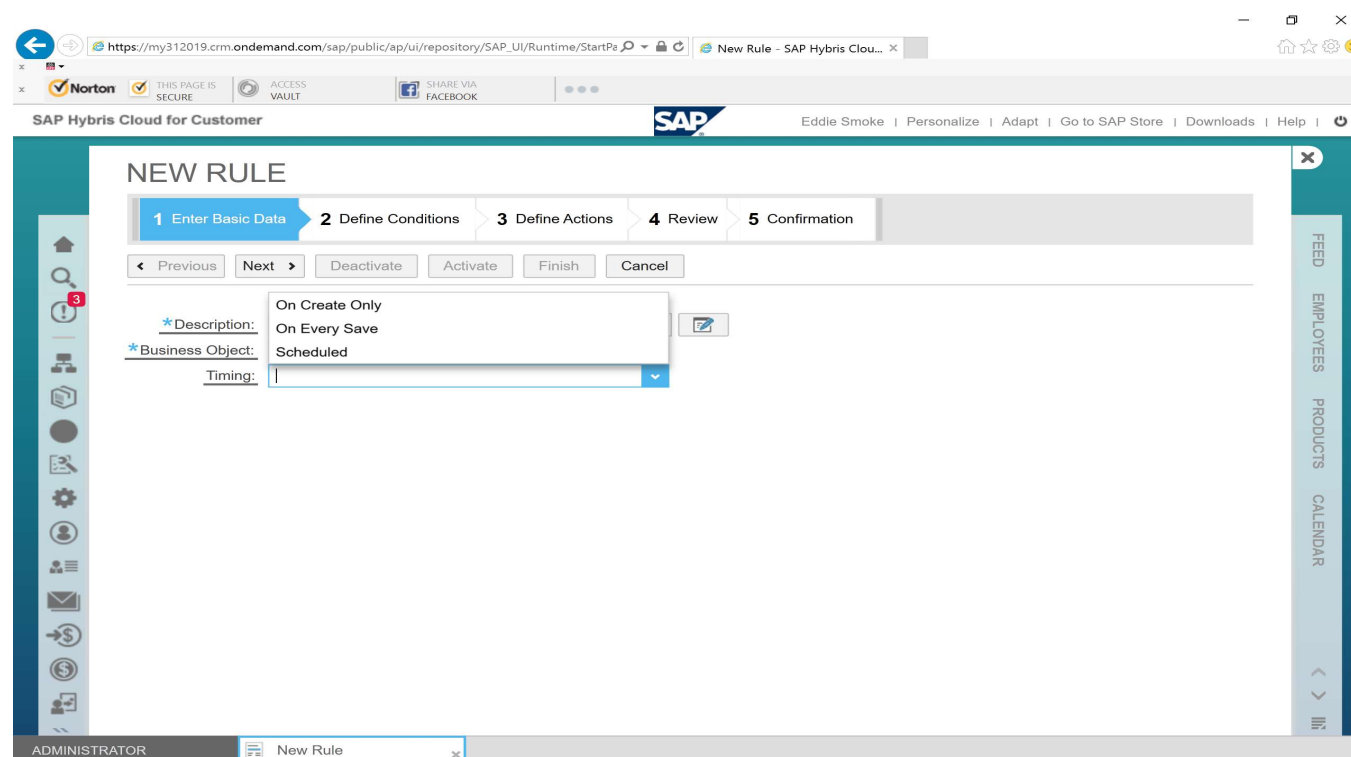
And then, select the business object desired, in our case will be "Lead".



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

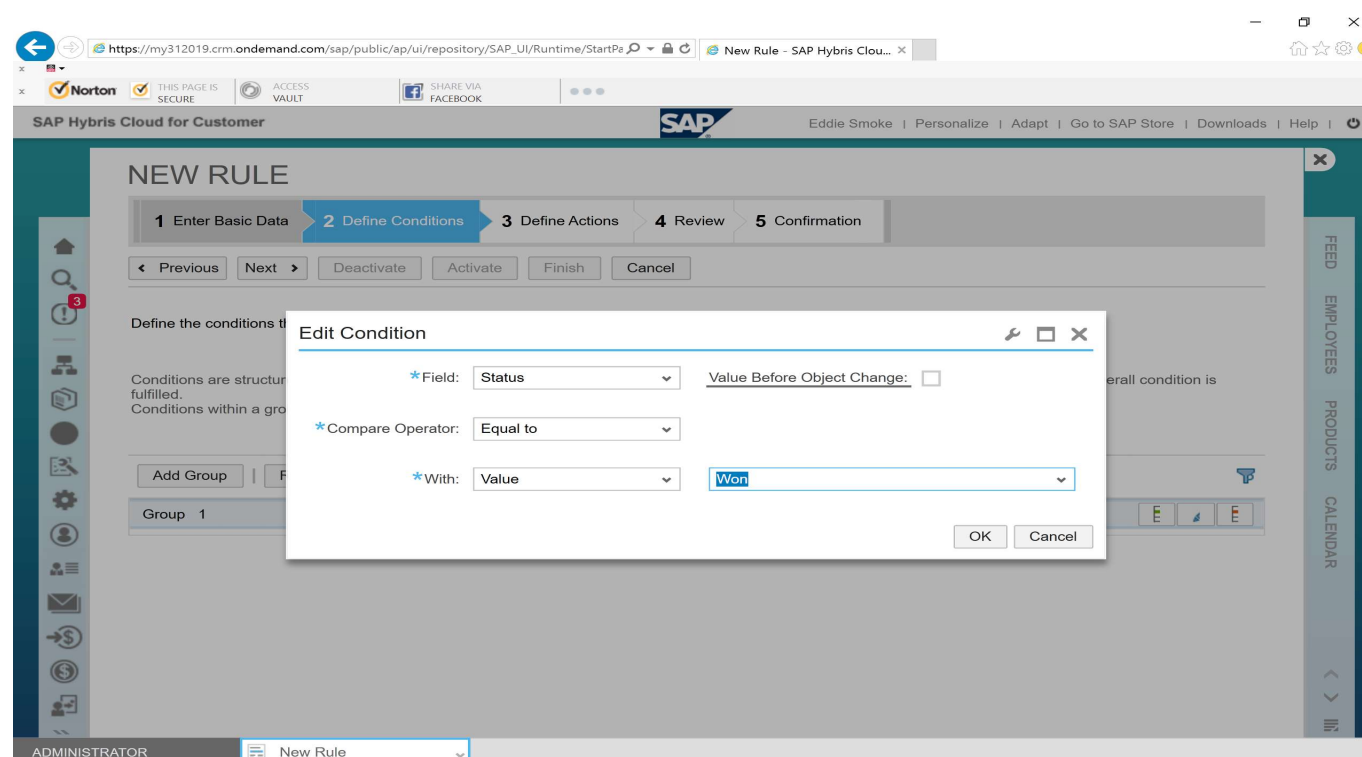
- On Create Only  
The rule will be triggered only on creation event.
- On Every Save  
The rule will be triggered every save event
- Scheduled  
The rule will be triggered by time, scheduling to execute previous determination.

And Then Next



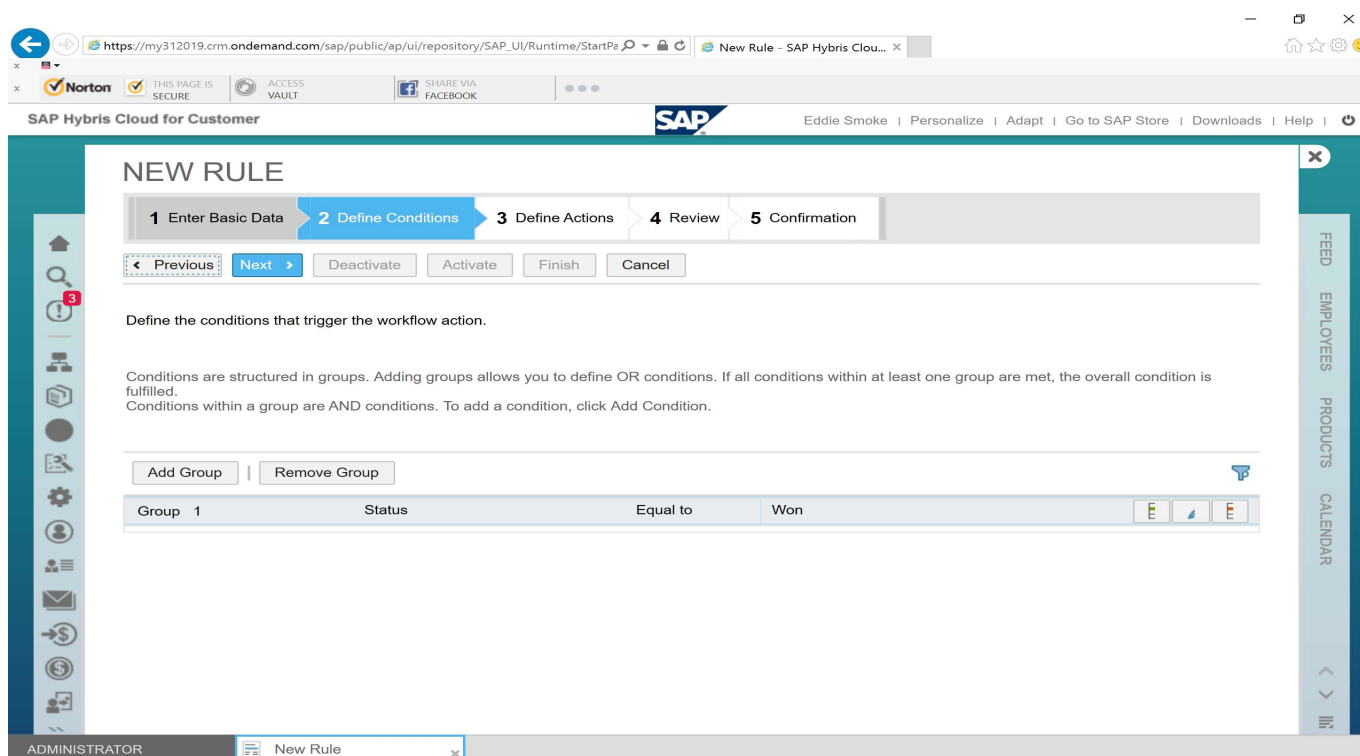
Right now, will be determined the condition of our rule. And by now, let's determine that rule will be executed when status was set to "Won".

And then OK





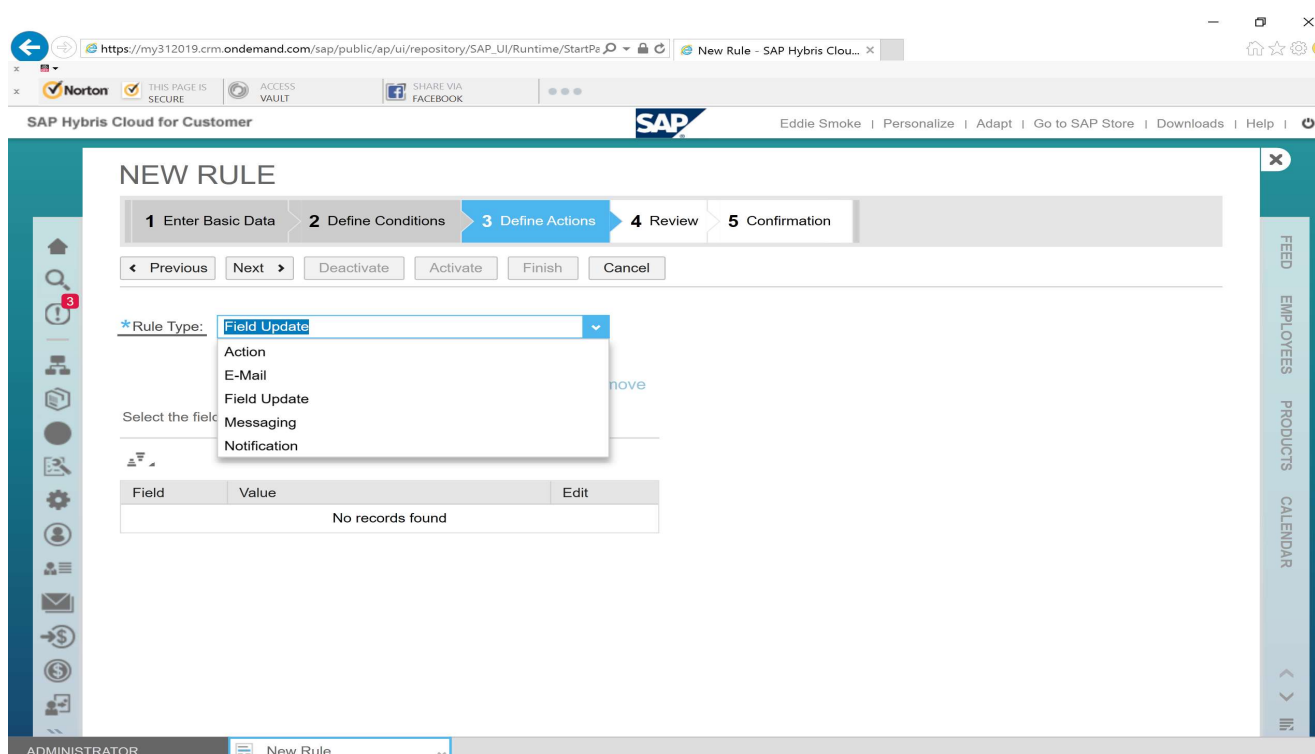
And then, click on Next button.



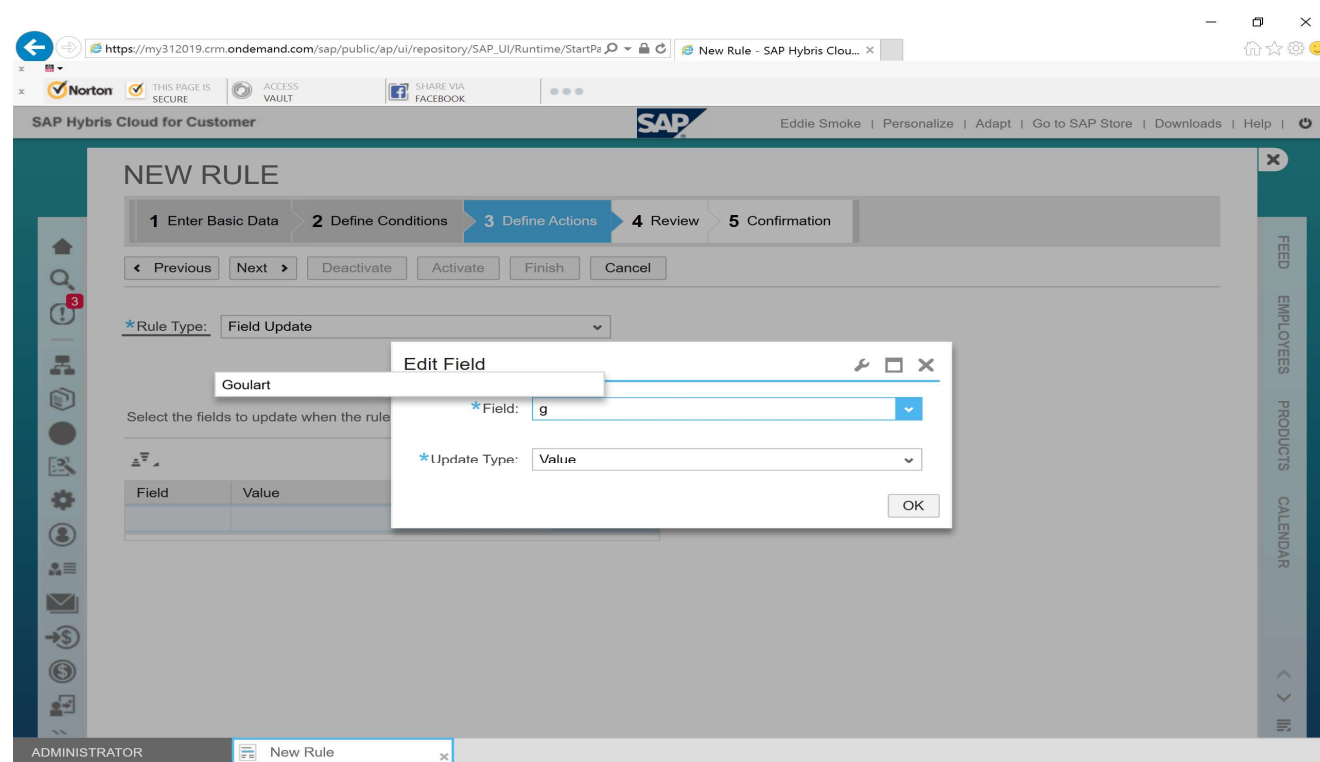
Right now, it's necessary to determine what's the type of our rule.

- 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.

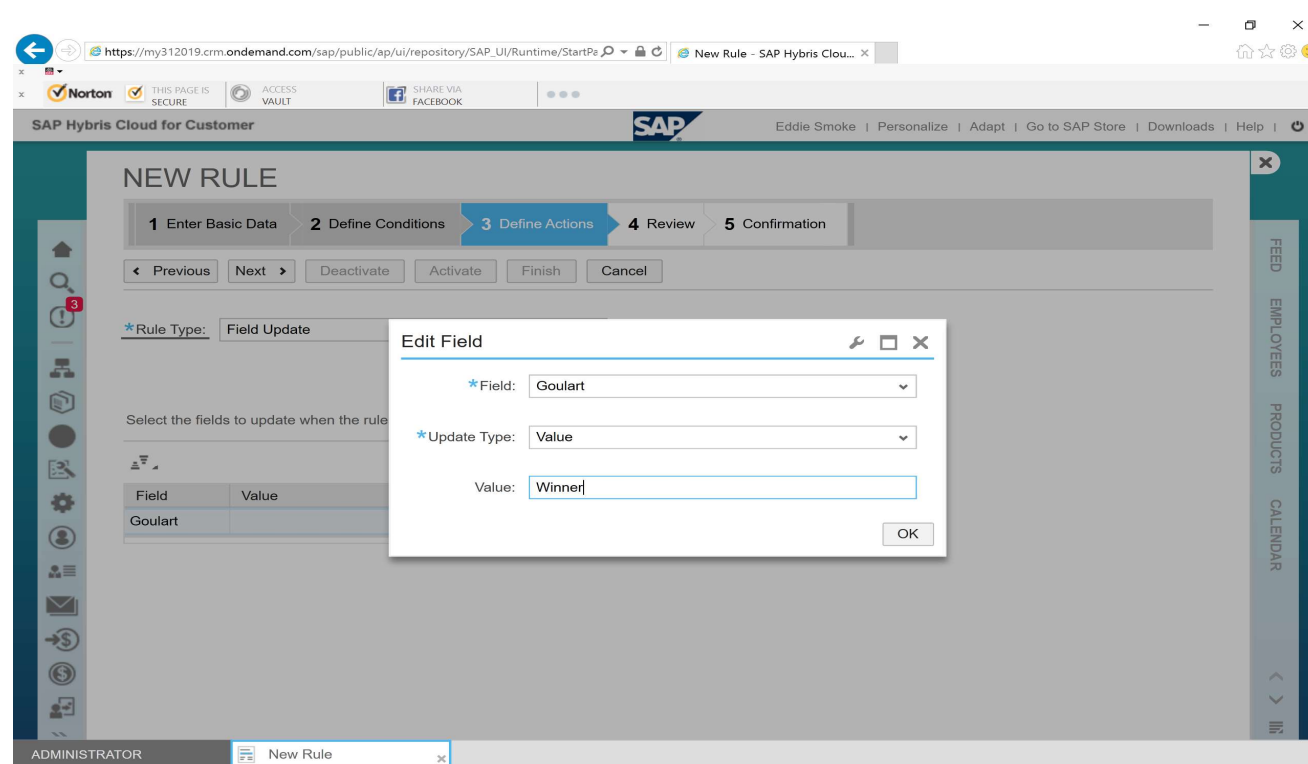
To our example, I will select Field Update.



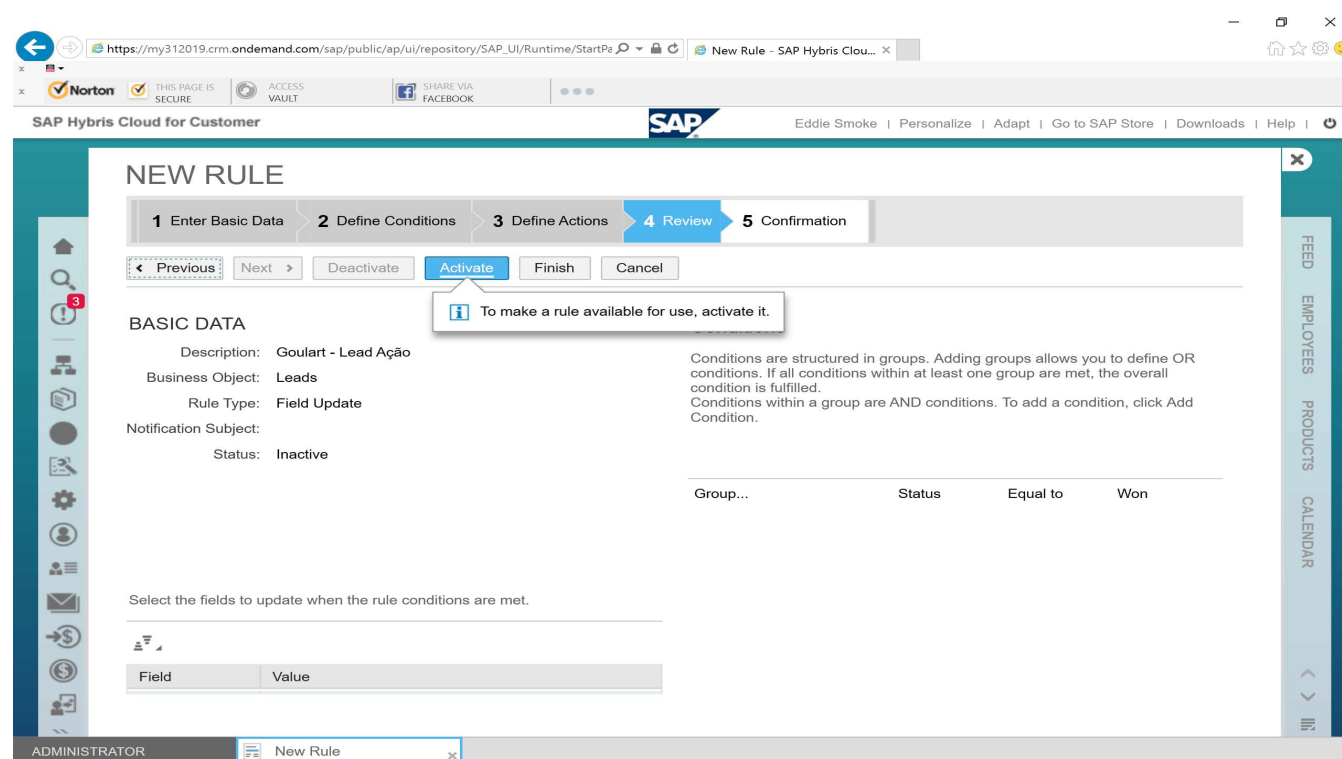
Are u Remember our Z Field “Goulart”? That’s right!! Let’s use it.



The objective is update Z field with “Winner” when Status is set by “Won”.



And then Activate the rule, and finish it.





**NEW RULE**

1 Enter Basic Data | 2 Define Conditions | 3 Define Actions | 4 Review | 5 Confirmation

Previous | Next | Deactivate | Activate | Finish | Cancel

**BASIC DATA**

Description: Goulart - Lead Ação  
 Business Object: Leads  
 Rule Type: Field Update  
 Notification Subject:  
 Status: Active

**Conditions**

Conditions are structured in groups. Adding groups allows you to define OR conditions. If all conditions within at least one group are met, the overall condition is fulfilled. Conditions within a group are AND conditions. To add a condition, click Add Condition.

Group...	Status	Equal to	Won

Select the fields to update when the rule conditions are met.

Field	Value

ADMINISTRATOR | New Rule

## 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".

**2016 Opp**

Contact: Lou Daly MBA  
 Qualification:  
 Status: Won  
 Approval Status:  
 Source:  
 Brand Interest: Brand A  
 Campaign:  
 Category:  
 Owner: Mike Summ...  
 Marketing Unit: Sales Unit US  
 Note:

**OVERVIEW** | FEED | PRODUCTS | ACTIVITIES | CONVERSION

**PRODUCTS**

Product	Category	Quantity
No records found		

**CONVERSION**

Name	Type

Please enter a party with role Lead External(Z).

SALES | 2016 Opp

And then Save the record

**2016 Opp**

Sales Territory ID: 177  
 Sales Territory Name: South UK  
 Score:  
 Goulart:  
**ACCOUNT INFORMATION**  
 House Number: 9009  
 Street: North Avenue  
 City: MINNEAPOLIS  
 Country: U.S. United States

**OVERVIEW** | FEED | PRODUCTS | ACTIVITIES | CONVERSION

**PRODUCTS**

Product	Category	Quantity
No records found		

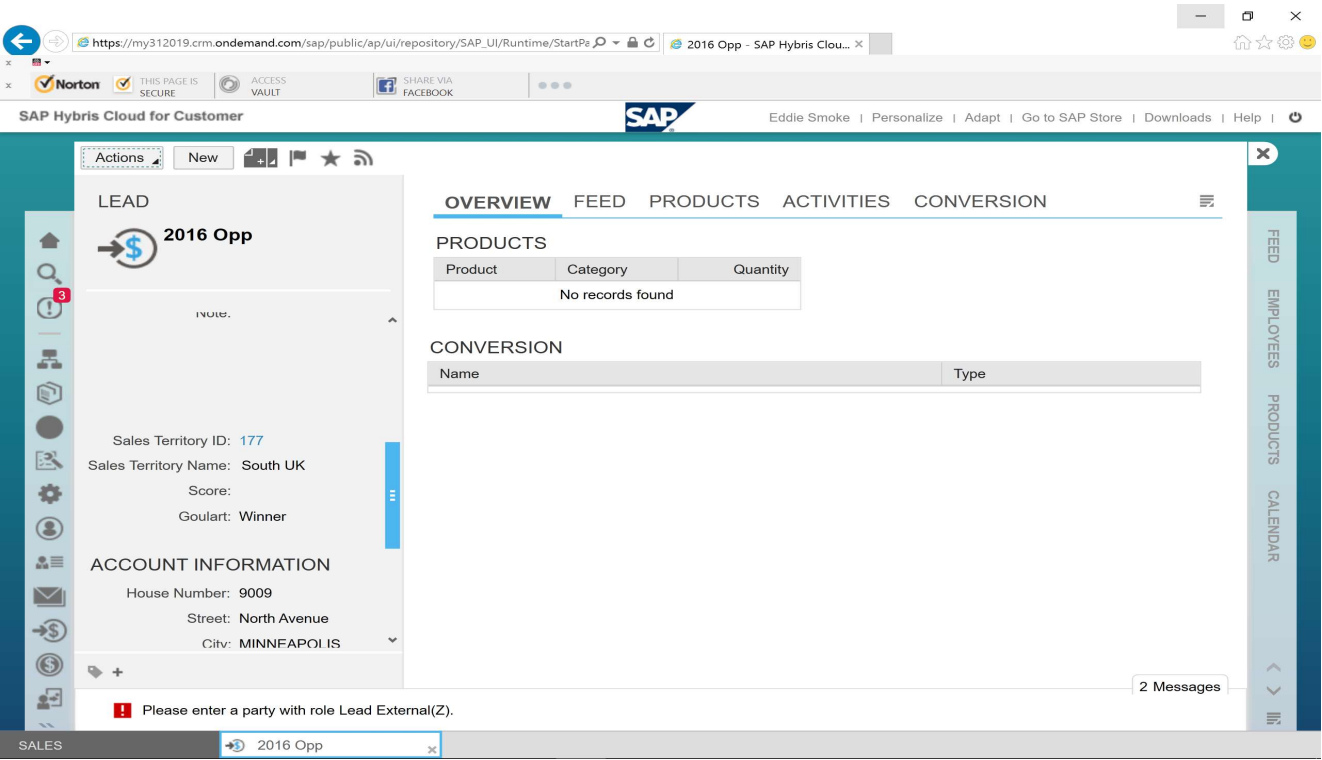
**CONVERSION**

Name	Type

Please enter a party with role Lead External(Z).

SALES | 2016 Opp

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!!