# Workflow

# How to create & update a Workflow?

Workflow is the set of different stages of a task. To create a workflow for your organization, follow the below-mentioned steps:

1. From **Navigation Menu**, go to **Configuration** module and click on **Workflow** sub-module.
2. Click on the plus icon '+' to add a new workflow.
3. Enter Name and Description of Workflow, and click **Next**.
4. To add a new state, click on the **+ icon.**
5. Enter State **Label**, **Description**, **State for** (like for mobile user, web user or public user) and **Properties** required for the state,
6. Select state icon and color for color identification of a particular state.
7. Check the permissions to be given under that state and click **Save**.
8. Create different states as requirement.
9. After creating states click **Next**.
10. Choose web state movement for each state as required for your organization and click **Next**.
11. Tap on **Save** to create.

## To Edit a workflow:

1. Click on the **workflow** to edit it.
2. Make the **required changes.**
3. Then, Update the workflow.

# Workflow

## What is a Workflow?

A workflow is the sequence of processes through which a task (a piece of work) passes from initiation to completion. In simple words, a workflow is a set of different stages of a task.

## Why are workflows needed?

Workflows comprise of various stages/ states that can help in segregating and defining the movement of the task. Based on its current status, a task traverses through multiple states before its completion. Each workflow state has individual settings and permissions that control the inflow and outflow of tasks in that state.

## How to create a Workflow?

One can create custom workflows for their organization. Each workflow state can then be configured according to the need of the company and the nature of the task.

To know how to create a task, please refer to this link.

## Workflow state properties

1. **State for** (Mobile user/Web user/Public User): This refers to which user will be able to access this certain state
2. **Create task**: Allow task creation in that particular state
3. **Excel upload**: Uploading excel files are allowed like bulk upload
4. **Edit task**: Allow editing allocated tasks
5. **Assign priority to task**: Allow prioritization of tasks in that state
6. **Send a follow up (Revisit)**: Create a follow-up form of a completed visit
7. **Export PDF**: Export .pdf file of completed tasks
8. **Export Media**: Export media attached with completed tasks
9. **View Logs**: Allow capturing logs of each activity on a task
10. **View mobile user details**: Allow access to mobile user's details
11. **View task location**: Allow viewing the location of a task at the time of completion

12. **Delete task**: Allow deleting a created task
13. **Order feature**:  (**Order taken**): Allow receiving orders / (**Order dispatch**): Allow order dispatching
14. **Retrieve task**: Allow movement of tasks from completed to pending

# How to change permissions in a workflow ?

Workflow permissions can be changed or updated  as per requirement.

**This can be done in following ways:**

1. From the ***Left Navigation***, go to **Workflow** under **Configuration**.
2. Choose the workflow you want to edit and click Next. (**Click here to know:** How to create a new workflow ? )
3. Click on **Edit** for a particular state to modify the access for that particular stage.
4. Click on the check boxes to add or remove the access for features.
5. Click **Update** to save changes.
6. Make changes for any of the workflow state in the same manner.
7. Now you can define **Movement of State** if required (Please make sure there are minimum two states present having **"Move Case"** as property) by clicking on **Next**.
8. Click on **Next** after updating the workflow movement.
9. Check the **Workflow** properties.
10. Click on **Update** to save the changes made in workflow.

# How to add order feature option to a workflow?

Order feature for order taken and order dispatch can be added in the workflow through following steps:

1. From the **Left Navigation Menu** on FeetPort web portal go to **Workflow** under **Configuration**.
2. Click on the **Workflow** to Edit.
3. To enable **Order Feature** option in the state, click on **edit on the state.**
4. In the state properties, select **Order taken** under **Order feature** property to enable order taken.
5. To enable order dispatch, select **Order dispatch** under **Order Feature** property.
6. Finally, **update** the Workflow.

# How to retrieve a submitted task?

Web user can give permission to mobile user to retrieve the submitted task in case the mobile user wants to update the task later on. It can be done in through following steps:

1. From the **Navigation Menu**, go to **Workflow** under **Configuration** module.
2. Click on the workflow which has been  selected for the activity..
3. To enable **Retrieve task** option in the state, click on edit option of particular state.
4. In the state properties, select **Retrieve task** property.
5. Update **Workflow**.
6. Now , go to **Activities** under **Configuration** module in Navigation Menu.
7. Edit **Activity**.
8. Click on the **Workflow States**
9. Click on the **Mobile state** tab.
10. Check Allow **Retrieve Task**.
11. Select the states from which task can be retrieved.
12. Enter **Task retrieve Timeout** in hours, up to which task can be retrieved.
13. Update **Activity**.

# How to allow deletion of task?

1. From the **Navigation Menu**, go to **Workflow** under **Configuration**.
2. Click on the **workflow**  to edit by clicking on pencil icon.
3. To enable order taking option in the state, edit the state.
4. In the state properties, check the option, **Delete task** and click **update**.
5. Finally, **update** the workflow.

# How to delete a workflow?

To delete a workflow for your organization, follow the below-mentioned steps:

1. From your **Navigation Menu** on web portal,  go to **Configuration** module and click on **Workflow** sub-module.
2. **Choose the workflow** you want to delete.
3. Click on the **bin icon ?** next to that workflow.
4. Click on **Delete.**

# How to select icon and color for workflow state?

Workflow is the set of different stages of a task. Giving a color code and icon to a workflow state is important as it helps you visibly identify tasks under various stages.

If not selected, a admin/web user might not be able to

To create a workflow for your organization, follow the below-mentioned steps:

1. From **Navigation Menu**, go to **Configuration** module and click on **Workflow** sub-module.
2. Click on the workflow or plus icon '+' to add a new workflow.
3. Click **Next**.
4. Click on the Edit option on any of the state to modify it. (To add a new state, click on the **+ icon)**
5. A side widow will appear.
6. Select the icon and color for the workflow state below description color identification of a particular state.
7. Check the permissions to be given under that state and click **Save**.
8. Click **Next** and then click **Update**.
9. Workflow state will be updated.