

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

Revision #6

Created Tue, Apr 16, 2019 4:23 AM

Updated Tue, Apr 21, 2020 5:47 AM by [Kamna](#)