

# OA Advanced Workflow Pack

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# 1 Overview

## 1.1 Introduction to OA Systems Ltd

OA Systems have a wealth of knowledge and experience in both PowerApps and Dynamics 365 Customer Engagement, including Licensing, Consulting, Development and Integration.

Some of the challenges we have seen over the years can be easily resolved by small customisations and we are giving some of these to you FREE OF CHARGE. No strings attached! The only thing we ask is, if you like our offerings, tell others about us.

## 1.2 Introduction to OA Advanced Workflow Pack

The Advanced Workflow Pack Enhances and Compliments Dynamics 365 Customer Engagement by adding or enhancing functions not provided by the core platform. These functions will help to increase productivity and decrease complexity in your Workflows.

The functions that the Advanced Workflow Pack currently provides are the following:

## 1.2.1 Data - Get Longitude and Latitude for Address (Bing Maps Integrated)

Adding Geo Data to addresses for Heat Map and Mapping.

Process: test workflow pack  
**Set Custom Step Input Properties**

Property Name	Data Type	Required	Value
Address	Single Line of Text	Required	<input type="text"/>
Bing Maps Key	Single Line of Text	Required	<input type="text"/>

**Form Assistant**

Dynamic Values

Dynamic Values

**Operator:**

Look for:

Account

Add

Default value:

OK

Returns:

- Longitude
- Latitude

**Form Assistant**

Dynamic Values

Dynamic Values

**Operator:**

Set to

**Look for:**

Data - Get Long And Lat For Addres

Latitude

Latitude

Longitude

## 1.2.2 Email - Insert CSS into Email

Using a CSS Webresource to Standardise Emails.

Property Name	Data Type	Required	Value
CSS Webresource	Lookup	Optional	
CSS Text	Single Line of Text	Optional	body { }

Returns:

- HTML String for inserting into the body of an email:

### 1.2.3 Email - Send Email to Queue Members

Sending/Directing an Email to Members of a Queue.

Property Name	Data Type	Required	Value
Email To Send	Lookup	Required	[Lookup Icon]
Recipient Queue	Lookup	Required	[Lookup Icon]
Include Owner?	Two Options	Required	<input checked="" type="radio"/> False <input type="radio"/> True
Send Email?	Two Options	Required	<input checked="" type="radio"/> False <input type="radio"/> True

**Form Assistant**

Dynamic Values

Dynamic Values

**Operator:**  
Set to

**Look for:**  
Account

Add

X | ↑ ↓

Default value:  
[Lookup Icon]

OK

Returns:

- Number of Users the email will be sent to:

**Form Assistant**

Dynamic Values

Dynamic Values

**Operator:**  
Set to

**Look for:**  
Email - Send Email To Queue Memt

Users Added

Add

## 1.2.4 Email - Send Email to Team Members

Sending/Directing an Email to Members of a Team.

Property Name	Data Type	Required	Value
Email To Send	Lookup	Required	
Recipient Team	Lookup	Required	
Send Email?	Two Options	Required	<input checked="" type="radio"/> False <input type="radio"/> True

Returns:

- Number of Users the email will be sent to:

## 1.2.5 Email - Send an Email in Draft State

Sending Emails that are in Draft State - Simply Setting the Email to "Pending Send" does not work.

The screenshot shows the 'Set Custom Step Input Properties' dialog box in Microsoft Dynamics 365. The dialog is titled 'Process: test workflow pack' and 'Set Custom Step Input Properties'. It features a table with the following columns: Property Name, Data Type, Required, and Value. The table contains one row: 'Email to Send' with Data Type 'Lookup', Required 'Required', and an empty Value field. To the right of the table is the 'Form Assistant' panel, which includes a 'Dynamic Values' dropdown, an 'Operator' dropdown set to 'Set to', a 'Look for' dropdown set to 'Account', an 'Add' button, and a 'Default value' field. The 'OK' button is located at the bottom of the Form Assistant panel.

Property Name	Data Type	Required	Value
Email to Send	Lookup	Required	

Returns:

- This component has no output



## 1.2.6 Query - Get a List

Query a List via System View, Personal View or FetchXML and return the results as a string separated with a configurable value - Great for returning a list of users. e.g. Steven, Phil, James, Harriet, Rose.

Property Name	Data Type	Required	Value
Include empty items in List?	Two Options	Optional	<input checked="" type="radio"/> False <input type="radio"/> True
List item separator	Single Line of Text	Optional	<input type="text"/>
Pick a System View to Use	Lookup	Optional	<input style="border: 1px solid #ccc;" type="text"/>
or Pick a Personal View to Use	Lookup	Optional	<input style="border: 1px solid #ccc;" type="text"/>
or Enter FetchXML to Use	Single Line of Text	Optional	<input type="text"/>

Returns:

- Number of Items in the List
- Output String of the Query

## 1.2.7 Query - Get a Table (Custom Styles)

Query a List via System View, Personal View or FetchXML and return the results as a HTML Table for insertion into an Email - Predefined but Configurable Style.

Property Name	Data Type	Required	Value
Table - Border Color	Single Line of Text	Required	#000000
Header - Background Color	Single Line of Text	Required	#6495ED
Header - Font Color	Single Line of Text	Required	#FFFFFF
Header - Make Font Bold	Two Options	Required	<input type="radio"/> False <input checked="" type="radio"/> True
Row - Background Color	Single Line of Text	Required	#FFFFFF
Row - Font Color	Single Line of Text	Required	#000000
Alternating Row - Background Color	Single Line of Text	Required	#F0F8FF
Alternating Row - Font Color	Single Line of Text	Required	#000000
Include Header for Table?	Two Options	Optional	<input type="radio"/> False <input checked="" type="radio"/> True
Pick a System View to Use	Lookup	Optional	<input type="text"/>
or Pick a Personal View to Use	Lookup	Optional	<input type="text"/>
or Enter FetchXML to Use	Single Line of Text	Optional	<input type="text"/>

Returns:

- Number of Results in the Query
- Query Results (CSV)
- Query Results HTML

## 1.2.8 Query - Get a Table (Default Styles)

Query a List via System View, Personal View or FetchXml and return the results as a HTML Table for insertion into an Email - Static Style.

Property Name	Data Type	Required	Value
Header - Make Font Bold	Two Options	Optional	<input type="radio"/> False <input checked="" type="radio"/> True
Include Header for Table?	Two Options	Optional	<input type="radio"/> False <input checked="" type="radio"/> True
Pick a System View to Use	Lookup	Optional	<input type="text"/>
or Pick a Personal View to Use	Lookup	Optional	<input type="text"/>
or Enter FetchXML to Use	Single Line of Text	Optional	<input type="text"/>

Returns:

- Number of Results in the Query
- Query Results (CSV)
- Query Results HTML

## 1.2.9 Workflow - Run on Query Results

Query a List via System View, Personal View or FetchXML and run a workflow for each of those results returned.

Property Name	Data Type	Required	Value
Workflow to Run	Lookup	Required	<input type="text"/>
Pick a System View to Use	Lookup	Optional	<input type="text"/>
or Pick a Personal View to Use	Lookup	Optional	<input type="text"/>
or Enter FetchXML to Use	Single Line of Text	Optional	<input type="text"/>

**Form Assistant**

Dynamic Values

Dynamic Values

**Operator:**  
Set to

**Look for:**  
Account

Add

Default value:

OK

Results:

- Number of Workflows Started

**Form Assistant**

Dynamic Values

Dynamic Values

**Operator:**  
Set to

**Look for:**  
Workflow - Run on Query Results

Number of Workflows Started

Add

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## 2 About OA Systems

OA Systems have been operating since 1992 delivering Office Automation and Field Services solutions. While we have delivered a range of different solutions over this time, our core focus has always been on process improvement via automation. Over 10 years ago, we began working with Microsoft Dynamics based solutions and Microsoft PowerApps and this remains our core focus today. We are a Gold Partner and a Microsoft Managed Partner.

We support deployments across the Cloud and On-Premises.