



Pragma Workflow Scheduler User Guide

Version 1.0.0

MS CRM Add-On –Workflow Scheduler

Every business has certain recurring tasks and processes which are required to be executed on a schedule and repeatable basis by helping in saving time required for executing the repeatable processes on a periodic basis. Though manual execution is not a difficult task for these processes, however, an automated scheduler can ease the entire work while giving the employees more time to focus on the core & cardinal activities.

Workflow Scheduler Executes repeatable processes automatically by helping in saving time required for executing the repeatable processes on a periodic basis.

Pragmasys's Workflow Scheduler provides the ability to schedule workflows on the following basis:

- Daily
- Weekly
- Monthly
- Specific Day of the Week
- Once a Week/ Month
- After Specific Time Interval

Embedded in the Microsoft Dynamics CRM Application, the Workflow Scheduler not only helps in scheduling the workflows, but also provides the capability to provide the record set leveraging the Advance Fetch XML / Find Views. By making it easier to trigger updates or workflows to the entry records on the scheduled basis, it provides a plethora of advanced functionalities to users. It enables the users to set the schedule time pattern, and specify the Advanced Find Queries for determining the records to be affected as the schedule triggers.

Underlying Features of Workflow Scheduler:

- Several types of schedule frequencies can be created such as once, daily, hourly, every X minutes, every X hours, weekly, every X days, monthly, quarterly, every X months, yearly etc.
- Allows execution of a workflow or triggering the update for an entity as part of the set schedule to perform an action
- As it is native to Dynamics CRM, it eliminates the need for any external programs.
- It is a high-performance tool which helps you build an advanced sub-schedule for processing thousands or lakhs of records on the scheduled basis
- With powerful record targeting, it uses the native "Advanced Find" for building up a query that can target a specific set of records for each individual schedule.

Steps:

1. Login into MS CRM.
2. Open the Pragma Licensing solution and then click on Configuration.



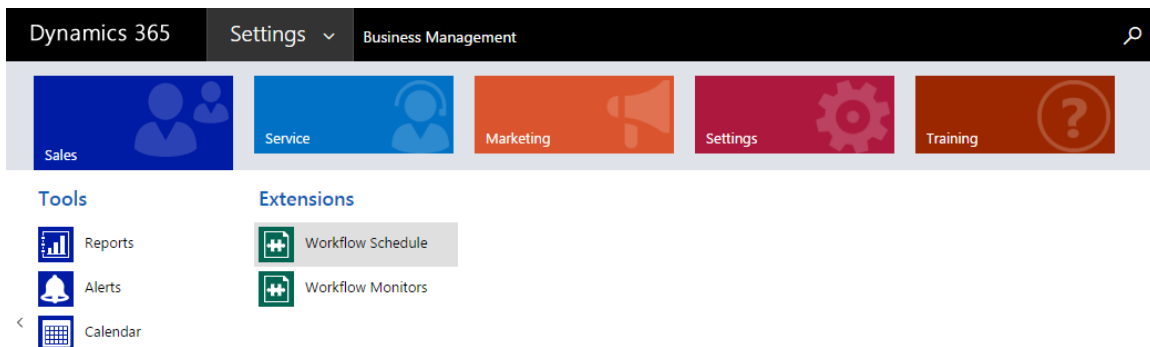
3. Enter the Client ID and Product key that you have received in the registration email and then click on submit.

Note: To get client ID kindly visit the link

https://product.pragmaxrm.com:8443/Product%20Registration/Registration.aspx?item_name=workflowscheduler

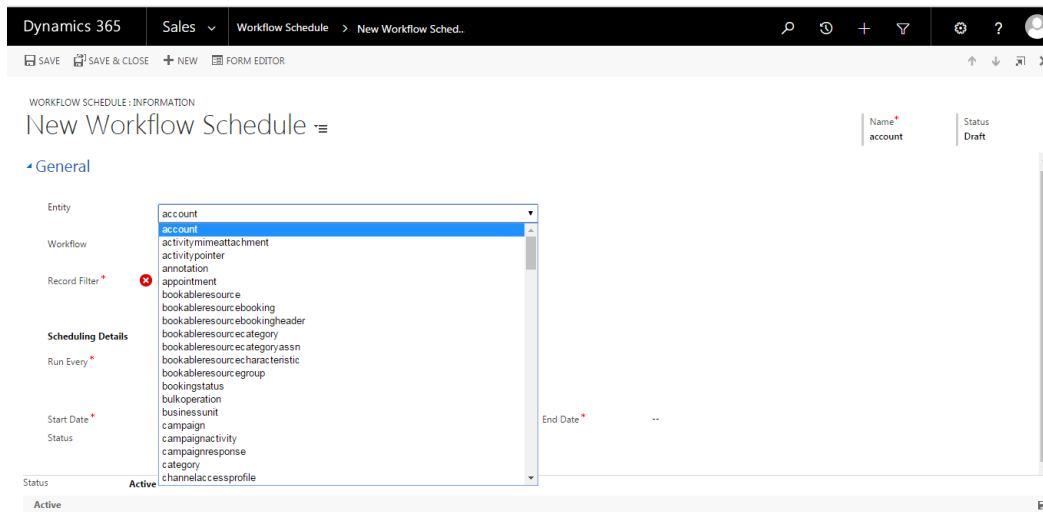
4. To view navigation of workflow Scheduler & Workflow monitor entity, enable these entities in sitemap area

Workflow Scheduler



Workflows Schedule:

1. Click on New (+) and then enter the details as per your requirement in the below mentioned form.
2. Entity field will display the drop-down list for the available entities in MS CRM.
3. Select the Entity as per your requirement and it will also populate the available workflows associated with the entity. For ex. We have taken Account entity.



4. Select the Record Filter and enter the Scheduling details on the form along with the Start and end date.

Dynamics 365 | Sales | Workflow Schedule | New Workflow Sched...

SAVE | SAVE & CLOSE | NEW | FORM EDITOR

WORKFLOW SCHEDULE : INFORMATION

New Workflow Schedule

Name: account | Status: Draft

Entity: account

Workflow: Account Update

Record Filter: All Records

Scheduling Details

Run Every: Daily

Day

Monday	<input checked="" type="checkbox"/>	Tuesday	<input checked="" type="checkbox"/>	Wednesday	<input type="checkbox"/>	Thursday	<input type="checkbox"/>
Friday	<input type="checkbox"/>	Saturday	<input checked="" type="checkbox"/>	Sunday	<input type="checkbox"/>		

Status: Active

Active

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SAVE | SAVE & CLOSE | NEW | FORM EDITOR

WORKFLOW SCHEDULE : INFORMATION

New Workflow Schedule

Name: account | Status: Draft

Record Filter: All Records

Scheduling Details

Run Every: Daily

Day

Monday	<input checked="" type="checkbox"/>	Tuesday	<input checked="" type="checkbox"/>	Wednesday	<input type="checkbox"/>	Thursday	<input type="checkbox"/>
Friday	<input type="checkbox"/>	Saturday	<input checked="" type="checkbox"/>	Sunday	<input type="checkbox"/>		

Start Date: 3/30/2017 8:00 AM | End Date: 9/31/2017 8:00 AM

Status: Draft

Status: Active

Active

Workflow Schedule using Advance Find View

Dynamics 365 | Sales | Workflow Schedule | account

NEW | ACTIVATE SCHEDULER | DEACTIVATE | DELETE | ASSIGN | SHARE | EMAIL A LINK | RUN WORKFLOW | START DIALOG

WORKFLOW SCHEDULE : INFORMATION

account

Name: account | Status: Draft

General

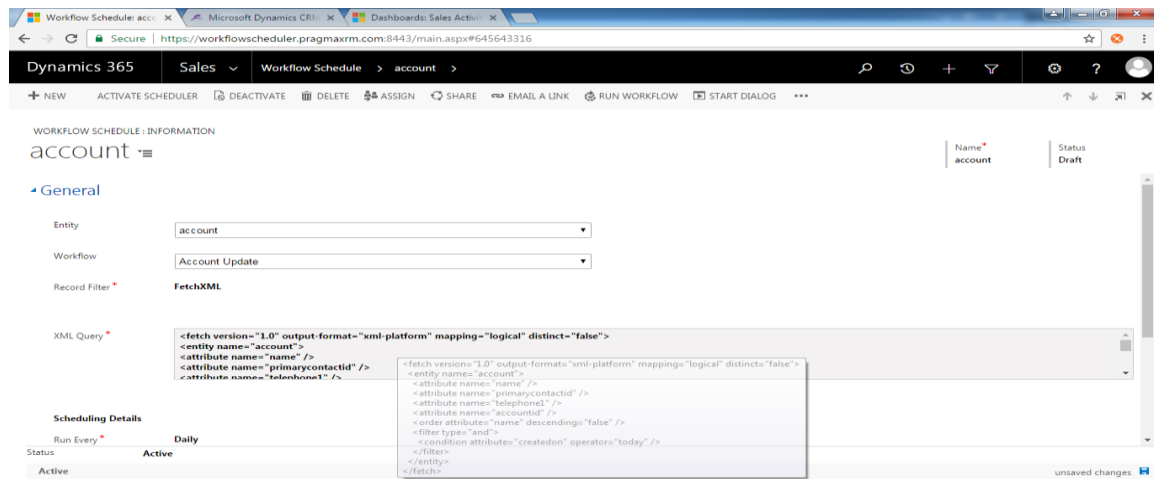
Entity: account

Workflow: Account Update

Record Filter: Advanced Find View

View: Account Advanced Find View

Workflow Schedule using Fetch XML



Workflow Schedule: account

Entity: account

Workflow: Account Update

Record Filter: FetchXML

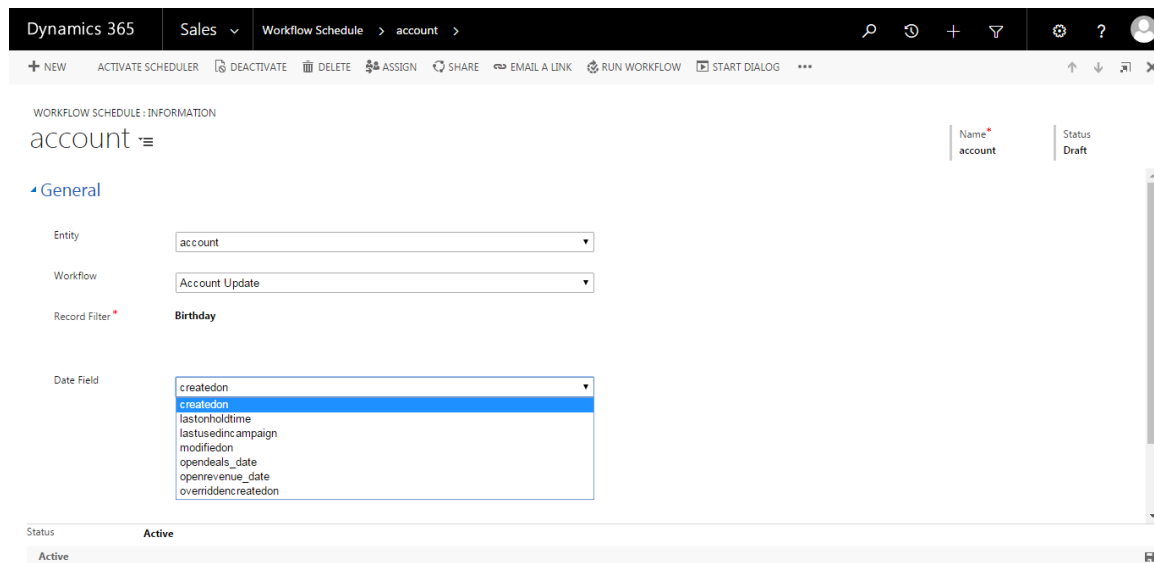
XML Query:

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
  <entity name="account">
    <attribute name="name" />
    <attribute name="primarycontactid" />
    <attribute name="telephone1" />
  </entity>
  <filter type="and">
    <condition attributes="createdon" operators="today" />
  </filter>
</fetch>
```

Scheduling Details: Run Every: Daily, Status: Active

Workflow Schedule record filter using Birthday/Anniversary:

Note: This type of record filter displays the date/time fields which are available on the MS CRM entity form, so that user can filter the record on basis of selected fields under the Date Field in scheduler.



Workflow Schedule: account

Entity: account

Workflow: Account Update

Record Filter: Birthday

Date Field:

- createdon
- createdon
- lastonholdtime
- lastusedincampaign
- modifiedon
- opendeals_date
- openrevenue_date
- overriddencreatedon

Status: Active

Workflow Schedule Settings on various scheduling options:

Daily:

Dynamics 365 | Sales | Workflow Schedule > New Workflow Sched..

SAVE SAVE & CLOSE + NEW FORM EDITOR

WORKFLOW SCHEDULE : INFORMATION

New Workflow Schedule

Name: account Status: Draft

Entity: account

Workflow: Account Update

Record Filter: All Records

Scheduling Details

Run Every: Daily

Day

Day	Run Every
Monday	<input checked="" type="checkbox"/>
Tuesday	<input checked="" type="checkbox"/>
Wednesday	<input type="checkbox"/>
Thursday	<input type="checkbox"/>
Friday	<input type="checkbox"/>
Saturday	<input checked="" type="checkbox"/>
Sunday	<input type="checkbox"/>

Status: Active

Monthly:

Dynamics 365 | Sales | Workflow Schedule > account >

+ NEW ACTIVATE SCHEDULER DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW START DIALOG ...

WORKFLOW SCHEDULE : INFORMATION

account

Name: account Status: Draft

Entity: account

Workflow: Account Update

Record Filter: All Records

Scheduling Details

Run Every: Monthly

Day Of Month: 26, 27, 28, 29, 30, 31

Start Date: 31

One Time:

Dynamics 365 | Sales | Workflow Schedule > account

WORKFLOW SCHEDULE : INFORMATION

account

Name: account | Status: Draft

General

Entity: account

Workflow: Account Update

Record Filter: All Records

Scheduling Details

Run Every: One Time

Start Date: 3/30/2017 8:00 AM | End Date: 3/31/2017 8:00 AM

Duration:

Dynamics 365 | Sales | Workflow Schedule > account

WORKFLOW SCHEDULE : INFORMATION

account

Name: account | Status: Draft

Entity: account

Workflow: Account Update

Record Filter: All Records

Scheduling Details

Run Every: Duration

Hours: 2 | Minutes: 15

Start Date: 3/30/2017 8:00 AM | End Date: 3/31/2017 8:00 AM

5. Click on Save button.

6. Click on Activate Scheduler button to Activate the scheduler.

Dynamics 365 Sales Workflow Schedule > account

[+ NEW](#)
[ACTIVATE SCHEDULER](#)
[DEACTIVATE](#)
[DELETE](#)
[ASSIGN](#)
[SHARE](#)
[EMAIL A LINK](#)
[RUN WORKFLOW](#)
[START DIALOG](#)

WORKFLOW SCHEDULE : INFORMATION

account

Name: account Status: Draft

Record Filter: All Records

Scheduling Details

Run Every: Daily

Day

Monday	<input checked="" type="checkbox"/>	Tuesday	<input checked="" type="checkbox"/>	Wednesday	<input type="checkbox"/>	Thursday	<input type="checkbox"/>
Friday	<input type="checkbox"/>	Saturday	<input checked="" type="checkbox"/>	Sunday	<input type="checkbox"/>		

Start Date: 3/30/2017 8:00 AM End Date: 3/31/2017 8:00 AM

Click on Workflow Monitor to view scheduled workflows:

Dynamics 365 Sales Workflow Monitors

[Sales](#)
[Service](#)
[Marketing](#)
[Settings](#)
[Training](#)

Tools

- Reports
- Alerts
- Calendar

Extensions

- Workflow Schedule
- Workflow Monitors

Dynamics 365

Sales

Workflow Monitors > workflow schedule fo... >

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+ NEW

🔒 DEACTIVATE

🗑️ DELETE

👤 ASSIGN

🔄 SHARE

📧 EMAIL A LINK

🏃 RUN WORKFLOW

🗨️ START DIALOG

📄 WORD TEMPLATES

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WORKFLOW MONITOR : INFORMATION

workflow schedule for account

General

Name	workflow schedule for account
Workflow Scheduler	account
Next Start Time	3/30/2017 8:00 AM
Last Executed On	--
Status	Not Started
Monitor Error	--
Owner	Proadmin CRM