



# **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.

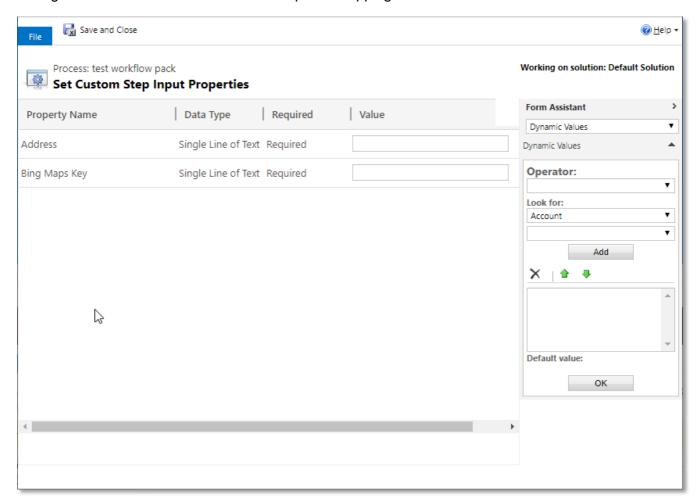
The functions that the Advanced Workflow Pack currently provides are the following:



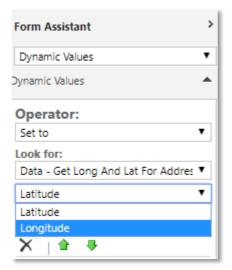


### 1.2.1 Data - Get Longitude and Latitude for Address (Bing Maps Integrated)

Adding Geo Data to addresses for Heat Map and Mapping.



- Longitude
- Latitude

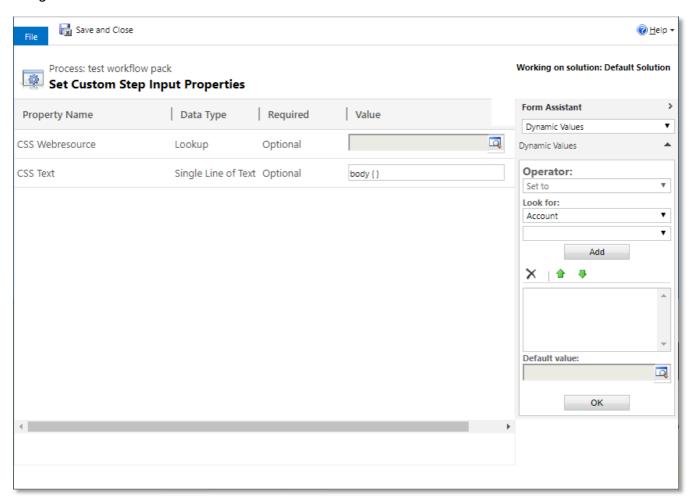






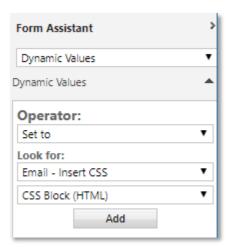
#### 1.2.2 Email - Insert CSS into Email

Using a CSS Webresource to Standardise Emails.



#### Returns:

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

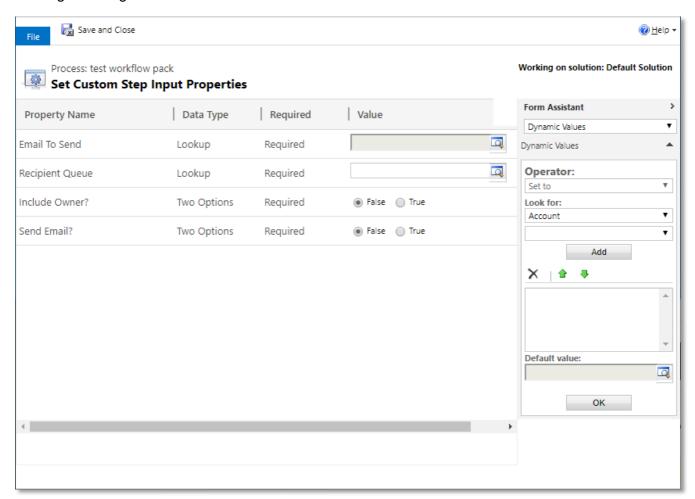






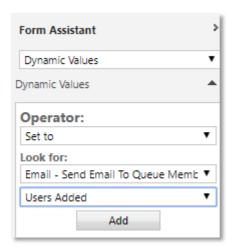
#### 1.2.3 Email - Send Email to Queue Members

Sending/Directing an Email to Members of a Queue.



#### Returns:

Number of Users the email will be sent to:

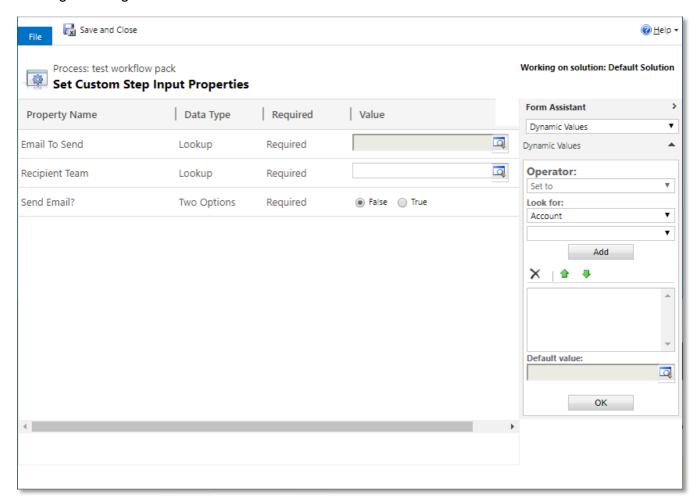






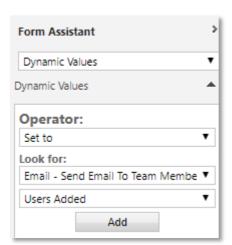
#### 1.2.4 Email - Send Email to Team Members

Sending/Directing an Email to Members of a Team.



#### Returns:

• Number of Users the email will be sent to:

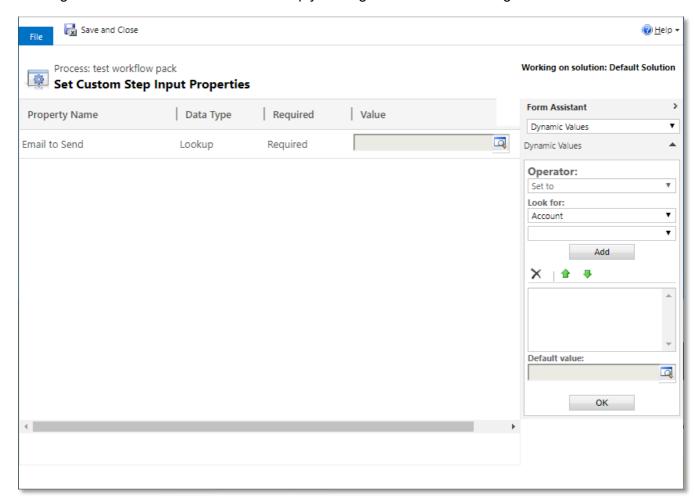






#### 1.2.5 Email - Send an Email in Draft State

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



#### Returns:

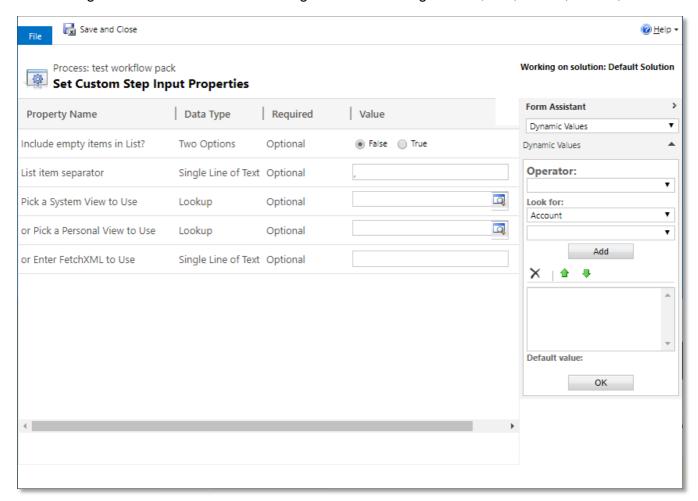
• This component has no output



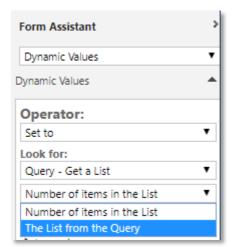


#### 1.2.6 Query - Get a List

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.



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

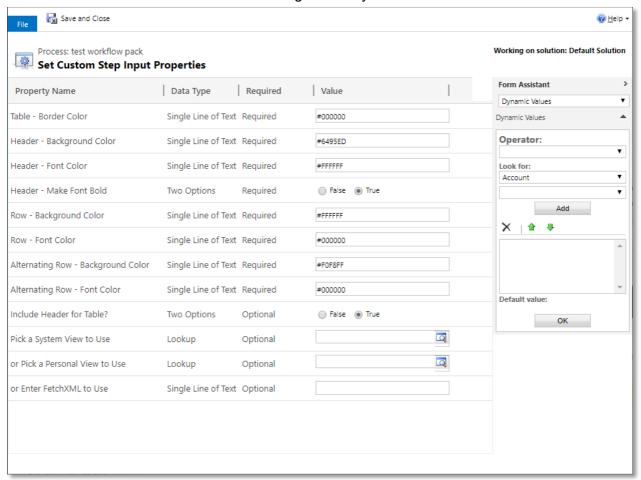




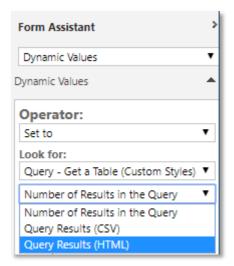


#### 1.2.7 Query - Get a Table (Custom Styles)

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.



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

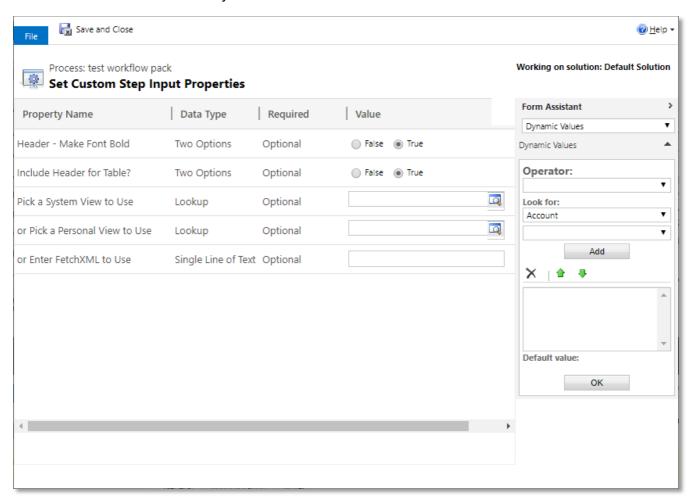




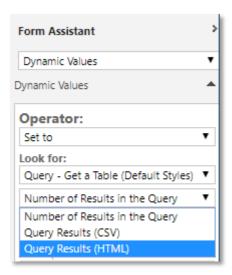


#### 1.2.8 Query - Get a Table (Default Styles)

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.



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

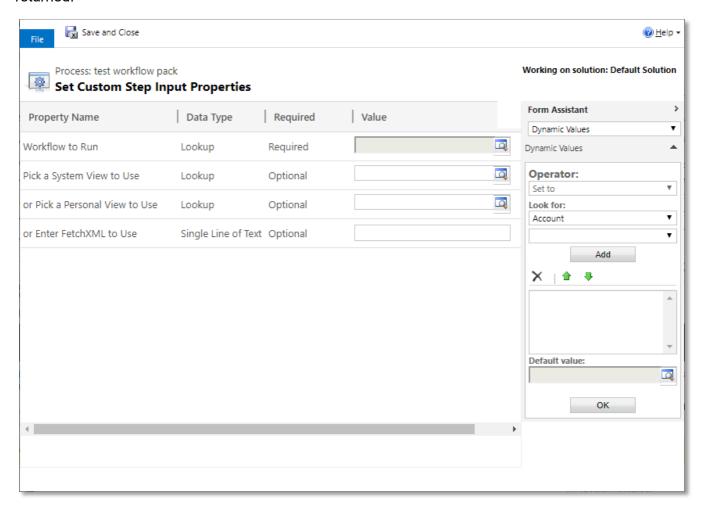






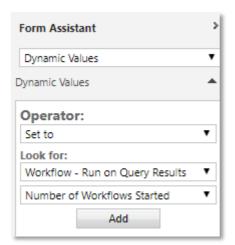
#### 1.2.9 Workflow - Run on Query Results

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



#### Results:

Number of Workflows Started







## 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.