Workflow Details

General

Title

<Workflow-Type> Workflow

Kebab menu (⋮)

Type	Menu item	Explanation
	History	

Header



1. To switch to Edit mode

Note: Only visible if you have not entered the workflow via the dashboard.

Widgets

1. Files
   (not for ORDER workflow)
2. Form
   (not for ORDER workflow)

Action buttons

Name	Function	Visibility
Save	Saves the workflow status	In Edit mode
Next step	Initiates the next step in the workflow process	In Edit mode, if there is a subsequent step
Previous step	Goes back one step in the workflow process	In Edit mode, if there is a previous step

Attribute fields

if filled, these refer to the details

- Possible for Contact workflow:
  - Contact
  - Customer number
- Possible for Activity workflow:
  - Contact
  - Activity (if you have not entered via the activity)
  - Customer number
- Possible for Visit workflow:
  - Contact
  - Customer number
  - Visit report

History

Grid

Name	Visible	Sort	Full Text	Explanation
Step	Visible		Yes	
Step started	Visible	DESC		dd.mm.yyyy - hh:MM
Owner	VisibleOnlyLandscape			
Status	Visible			
Note	Hidden			

FAQ

Release

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