WorkApps

Let’s work together...

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Customize your Tasks for any Department and Process using **WORKFLOWS**

SALES PIPELINE

PAYMENTS

CAMPAGINS

CUSTOMER SERVICE

COLLECTIONS

RECRUITMENT

CUSTOMER LEADS

CLIENT BRIEF

FACILITIES

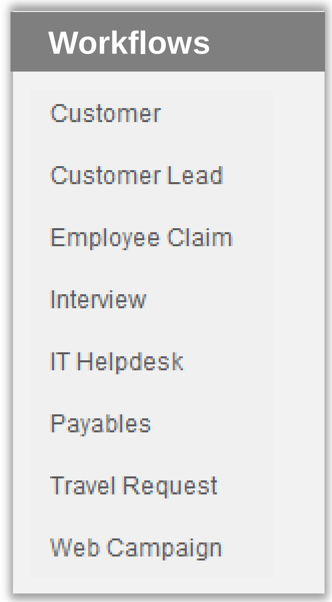
EMPLOYEE CLAIMS

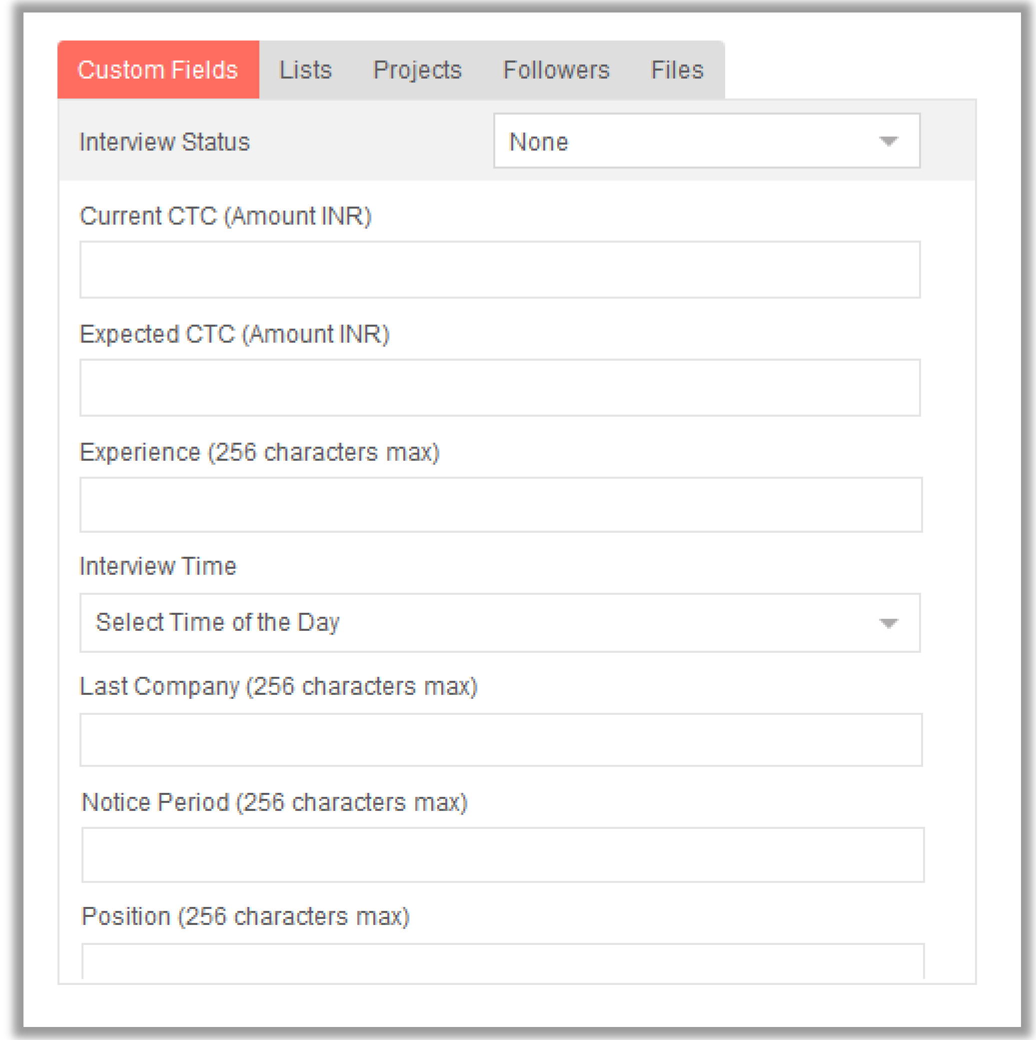
TRAVELDESK

IT HELPDESK

What are Workflows?

Workflow is a Template for Tasks, where you can add your own **Custom Fields** and give the Workflow various **Statuses**





Workflows can be created only by Administrators and will be visible for all Employees

What are Custom Fields?

You can create your **Own Custom Fields** and give it a validation or data type

Give the Custom Field a Name and select any one of the 3 types

User Input

Here the User will have to Enter Data basis the Validation type you select

- Amount (INR)
- Amount (USD)
- Percentage
- String (256 characters)
- Decimal
- Integer (16 digits)

How the User will see it in the New Workflow:

Expected CTC (Amount INR)

Last Company (256 characters max)

Preset Values

The User will be able to select a value from any of the 20 Generic Fields

- Browser
- Calendar
- Date of the Month
- Department
- Industry
- Meeting Type
- Operating System
- Time of the Day
- US Cities
- Year

How the User will see it in the New Workflow:

Interview Type

Select Meeting Type

- Select Meeting Type
- One to One Call
- Conference Call
- Face to Face Meeting
- Video Call

Enterprise Specific

The User can select from the options you enter in the Custom Field, specific to your Enterprise

Enter your options here | Add

- Web UI + iOS ×
- Java + HTML 5 ×
- Java + Android ×
- Java + .Net ×

How the User will see it in the New Workflow:

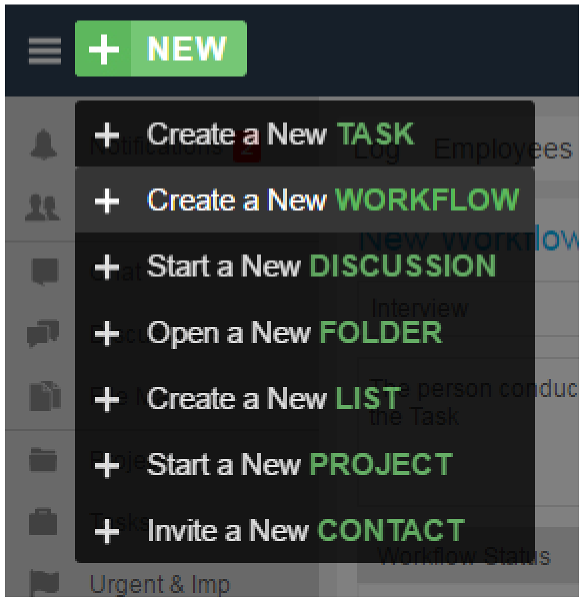
Tech Skill

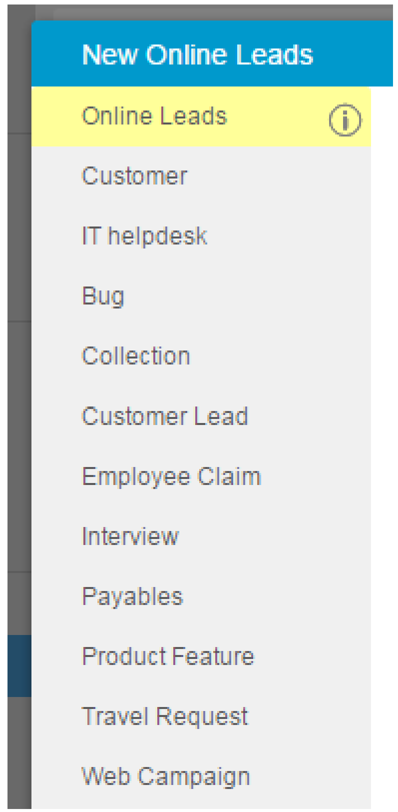
Select Tech Skill

- Select Tech Skill
- Java + .Net
- Java + Android
- Java + HTML 5
- Web UI + iOS

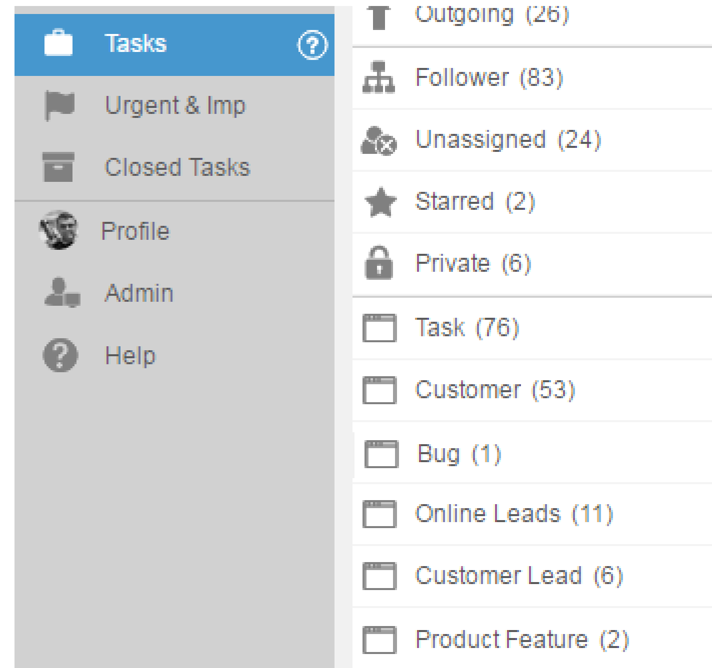
More on Workflows?

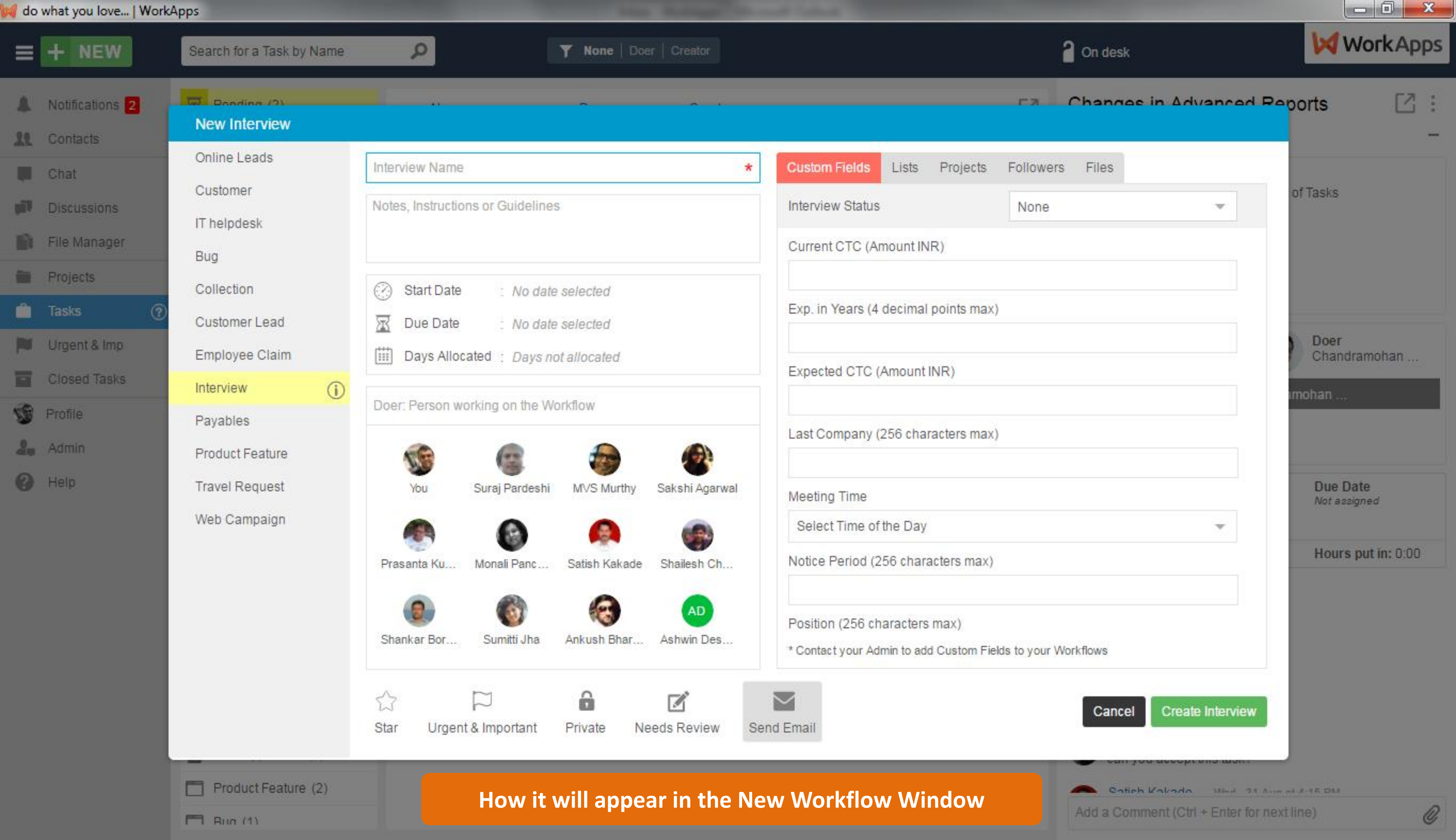
Create a New Workflow





View all Workflows in Tasks Folder





How it will appear in the New Workflow Window

How to use **Projects** in Workflows?

- Workflow Tasks should be added to **Projects** to view them together within a category
- By adding **Members** to Projects, they get access to all the Tasks directly
- Generate Reports on Projects to know **Pending, Overdue, Incomplete and Completed** Tasks
- A Workflow Task can be added to a Project by the **Creator** or by the **Doer**

SALES PIPELINE

- Jan 2016
- Delhi Branch
- North Region
- Vivek Varma Team

INTERVIEWS

- Java Developer
- Territory Manager North
- Interns
- VP Sales

CAMPAIGNS

- JFM Campaigns
- Mutual Fund
- Digital
- Thinkpad X220

TRAVEL REQUESTS

- Sales Team Travel
- JFM 2016
- Air Travel Requests
- Chennai Office Travel

PAYMENTS

- January 2016
- Direct Costs
- Infrastructure
- Thinkpad X220

COLLECTIONS

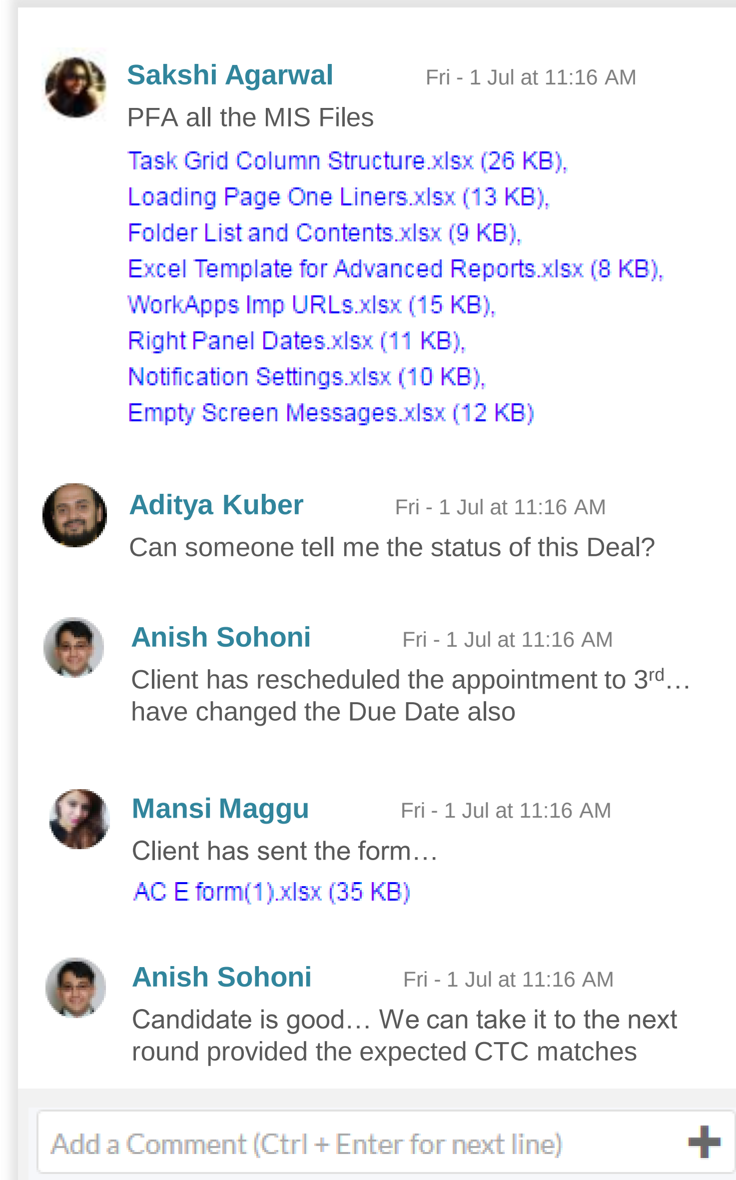
- North Region
- FY 2017
- Group M
- Above 10 lacs

How to use **Comments** in Workflows?

Comments can be used for 3 things:

- Record **Live Updates**
- **Chat** with everybody related to that Task
- **Attach** Files and Images

- Interview	: Candidate Feedback
- Sales Lead	: Customer Interaction and Documents
- Travel Request	: Attaching E-Ticket and Rescheduling
- Web Campaign	: Status Update, Reports and New Creatives
- Collections	: Client Interaction and Updates
- Payments	: Document Exchange
- IT Helpdesk	: Resolution



SALES PIPELINE for Financial Products

Default Fields	To be used for
Task Name	Name of the Customer
Due Date	Appointment Date with Customer
Doer	Sales Team Member / Account Manager
Creation Date	Date the Lead came in
Followers	Seniors, Backend Operations, Delivery Executives

Custom Fields	Type / Validation
Contact Number	Employee Input – Integer
Address	Employee Input – String
Appointment Time	Preset Values – Time of the Day
Product	Enterprise Specific – You can enter your own Product List

Projects

- January 2016 : Month or Quarter
- North Branch : Branch or Region
- Delhi Leads : City or Team
- Credit Cards : Product
- Online : Source or Origin
- DSA : Channel

Workflow Status

- New Lead
- Pending
- Not Interested
- Product Sold
- In Process
- Verification Pending

RECRUITMENT

Default Fields	To be used for
Task Name	Name of the Candidate
Due Date	Interview Date
Doer	Manager of that Position / HR Spoc
Creator	HR Spoc
Followers	All Interviewers and Finance Team
Files	Resume and Assessment Sheets

Custom Fields	Type / Validation
Experience in years	Employee Input – Decimal
Last Company	Employee Input – String
Current CTC	Employee Input – Amount (INR)
Expected CTC	Employee Input – Amount (USD)

Projects

Projects should be named as per the exact position

- Account Manager
- Territory Manager
- Sr. Java Dev

Workflow Status

- Interview Pending
- Selected
- Rejected
- Candidate not Interested
- Offered

Process

Interviewers can be added as Followers as in when their turn comes to Interview the Candidate

IT HELPDESK TICKETING

Default Fields	To be used for
Task Name	Problem
Notes	Explanation of the Complete Problem / Request
Creator	Employee who has generated the Ticket
Doer	Internal IT Spoc
Followers	Managers
Due Date	Date of Resolution
Files	Screenshots & Files

Custom Fields	Type / Validation
Device	Enterprise Specific – You can enter your own Device List
TAT in Days	Employee Input – Integer
Type of Issue	Enterprise Specific – You can enter your own Issue List

Projects

- Device : Laptop, Computer, Mobile
- North Branch : Branch or Region
- Type of Issue : Hardware or Software

Workflow Status

- Pending
- Resolved
- Cannot be Resolved
- In process

Process

Previous problems can be searched from Closed Tasks and Resolutions can be understood easily

REVENUE COLLECTIONS

Default Fields	To be used for
Task Name	Company Name from where the Payment is expected
Doer	Sales Person responsible for getting the payment
Creation Date	Invoice Date
Due Date	Date when the Payment is expected
Followers	Managers and Finance Team
Files	RO, PO, Invoices and Approval Emails

Custom Fields	Type / Validation
Amount	Employee Input – Amount (INR)
Credit Period	Employee Input – Integer
Contact Person	Employee Input – String
Agency	Enterprise Specific – You can enter your own Agency List

Projects

- JFM Quarter
- FY 2017
- Above 10 lacs

Workflow Status

- In Credit Period
- Overdue
- Dispute
- In Problem

DISCUSSION

A Discussion should be started by adding the Finance Team of the Client on Email, so that all Payment Updates are available in One Place thank you…

WorkApps

Let's work together...