

SAVED SEARCH USE CASE - WORKFLOWS



SAVED SEARCHES IN WORKFLOWS

- Use to trigger a workflow by scheduling it to run at specified intervals
 - If the record comes up in the search, then the workflow runs on that record
 - Saved search must be of the same record type as the workflow
- Use to define conditions to trigger a workflow “ON CREATE” or “ON VIEW OR UPDATE”
 - Previously you could only do this with custom formulas which are somewhat difficult and limited
- Transition in a workflow to a new state based on the Saved Search Condition

TRIGGER A WORKFLOW BY A SCHEDULE

Workflow

SUB TYPES

Description Item

Discount Item

Inventory Part

Item Group

Kit Item

EXECUTE AS ADMIN

☐

RELEASE STATUS

Released

ENABLE LOGGING

☐

INACTIVE

☐

Initiation

EVENT BASED

☐

SCHEDULED

☒

Schedule

* SAVED SEARCH FILTER

Labels - Standard & Alpine

REPEAT

☒

FREQUENCY

Every 30 minutes

* SCHEDULED FROM DATE

9/6/2013

SCHEDULED UNTIL DATE

Fields

History

SHOW INACTIVES

☐

CONDITIONS IN A WORKFLOW

Workflow

Save

Cancel

Change ID

Actions

Basic Information

* NAME

Ship Method - Free Shipping

DESCRIPTION

SCRIPT ID

customworkflow206_3

RECORD TYPE

Transaction

* SUB TYPES

Bin Transfer

Bin Worksheet

Cash Refund

Cash Sale

Check

OWNER

E102 Cory S Anderson

EXECUTE AS ADMIN

☒

RELEASE STATUS

Released

ENABLE LOGGING

☐

INACTIVE

☐

Initiation

EVENT BASED

☒

SCHEDULED

☐

Event Definition

ON CREATE

☒

ON VIEW OR UPDATE

☐

TRIGGER TYPE

After Record Submit

EVENT TYPES

Approve

Cancel

Create

Direct List Edit

CONTEXTS

CSV Import

Custom Mass Update

Offline Client

Portlet

USE

☐

CUSTOM FORMULA

☐

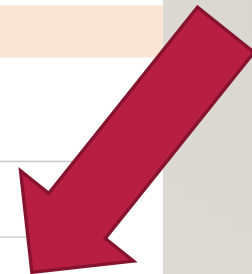
VISUAL BUILDER

☒

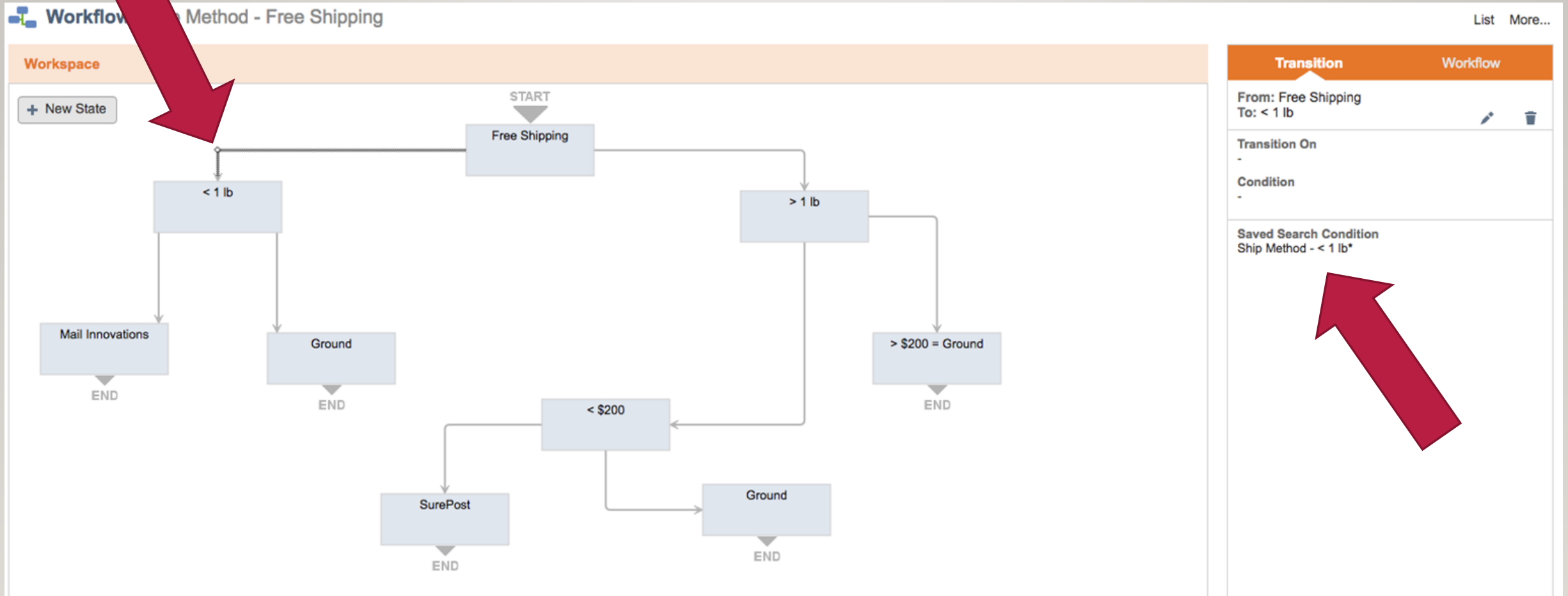
CONDITION

SAVED SEARCH CONDITION

Ship Method - Free Shipping



TRANSITION TO A NEW STATE IN A WORKFLOW



BONUS!

SAVED SEARCH SAVED SEARCHES

- Use a Saved Search for Saved Searches
- Use when you have a defined naming structure to organize lots of searches
- Use to filter organize searches based on record types
- Some fields you can use in the criteria:

Title
Created by
Date Created
Modified by
Type (record type)
Scheduled

From Bundle
Owner
Send Trigger Emails
And more ...

SAVED SEARCH SAVED SEARCH



Activities

Payments

Transactions

Searches

Lists

Reports

Customization

Documents

Setup

Imports

Support



Ship Method Saved Searches: Results

List Search

Return To Criteria

Edit this Search

+ FILTERS



TOTAL: 23

EDIT VIEW	INTERNAL ID	FROM BUNDLE	TITLE	ID	TYPE	OWNER	ACCESS	EXPORT RESULTS	PERSIST RESULTS	LAST RUN BY	LAST RUN ON
Edit View	1252		Ship Method - < 1 lb*	customsearch1252	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)		1/16/2018 8:37 pm
Edit View	1253		Ship Method - < \$200	customsearch1253	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)		1/16/2018 8:37 pm
Edit View	1254		Ship Method - > \$200	customsearch1254	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)		1/16/2018 8:16 pm
Edit View	1255		Ship Method - between 1 and 9 lbs*	customsearch1255	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)		1/16/2018 7:46 pm
Edit View	1256		Ship Method - > 1 lb*	customsearch1256	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)		1/16/2018 7:46 pm
Edit View	1257		Ship Method - > 9 lbs*	customsearch1257	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)		1/16/2018 8:37 pm
Edit View	1258		Ship Method - Free Shipping	customsearch1258	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)		1/16/2018 8:37 pm
Edit View	1259		Ship Method - Prime SecondDay	customsearch1259	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)	E102 Cory S Anderson	7/19/2016 3:30 pm
Edit View	1260		Ship Method - Prime Second Day	customsearch1260	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)	E102 Cory S Anderson	7/19/2016 3:30 pm
Edit View	1261		Ship Method - Amazon Second Day	customsearch1261	Transaction	E102 Cory S Anderson	Private	Export (CSV)	Persist (CSV)	E102 Cory S Anderson	8/29/2016 3:19 pm
Edit View	1269		Ship Method - < 1 lb - AMZ Standard	customsearch1269	Transaction	E102 Cory S	Private	Export (CSV)	Persist (CSV)		8/3/2016 1:46