



WorkFlow Designer

Printable Help

Version 12.0

Last updated October 24, 2018

Abstract

This document is a printable version of WorkFlow Designer help.

For copyright and trademark information, see

https://help.genesys.com/latitude/liquid12/desktop/Copyright_and_Trademark_Information.htm.

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Introduction to WorkFlow Designer

The WorkFlow Designer program allows your organization to automate processing of accounts in Latitude. You can create user-defined events and workflows, and link the workflows to system- or user-defined events. When these events occur in Latitude, they trigger accounts that meet specific criteria for workflow processing. The WorkFlow Engine runs on a server as a scheduled job and processes the workflows.

What's New in WorkFlow Designer

The following Service Updates (SU) introduced changes and enhancements to WorkFlow Designer 12.0:

SU 4

System events

- Added "Address Confirmed" system event, which triggers when a user flags an address as confirmed.
- Added "Address Updated" system event, which triggers when a user updates an address.
- Added "AIM Final Recall" system event, which triggers when a user or the system issues a final recall of an account that a user placed with an outside collection agency or attorney.
- Added "AIM Placement" system event, which triggers when a user places an account with an outside collection agency or attorney.
- Added "Care Closed" system event, which triggers when a user changes the status of a care record to "closed."
- Added "Care Confirmed" system event, which triggers when a user flags a care record as confirmed.
- Added "Care Created" system event, which triggers when a user adds a care record to an account.
- Added "Care Unconfirmed" system event, which triggers for accounts that a user hasn't confirmed the care record, or a user removed the care confirmed flag.
- Added "Care Updated" system event, which triggers when a user updates a care record.

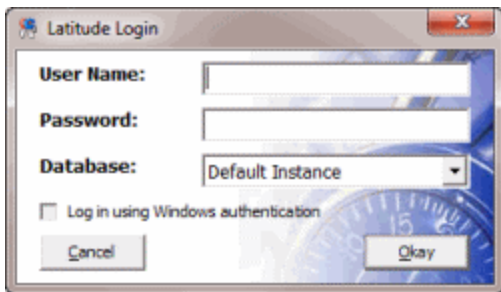
For more information, see [System Events](#).

Log on to WorkFlow Designer

Use the **Latitude Logon** dialog box to log on to WorkFlow Designer.

To log on to WorkFlow Designer

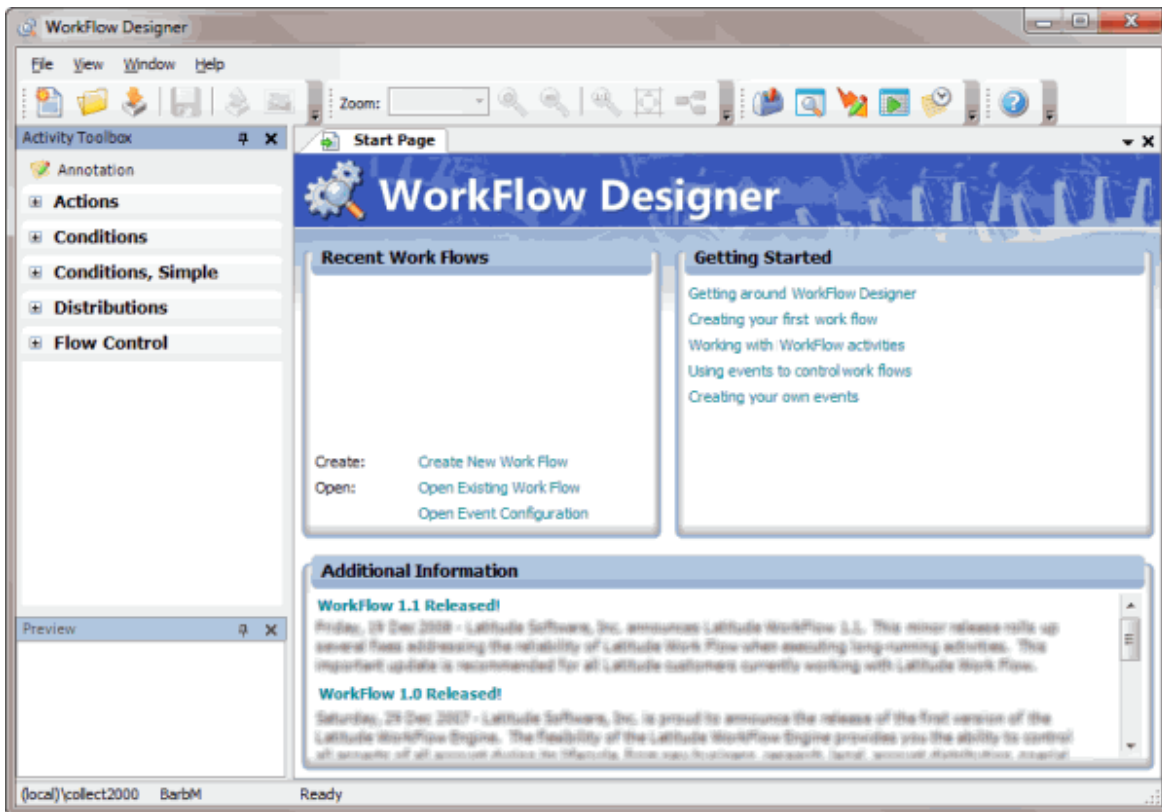
1. Click **Start > All Programs > Interactive Intelligence > Interaction Collector > WorkFlow Designer**. The **Latitude Logon** dialog box appears.



2. In the **User Name** box, type your Latitude user name.
3. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.

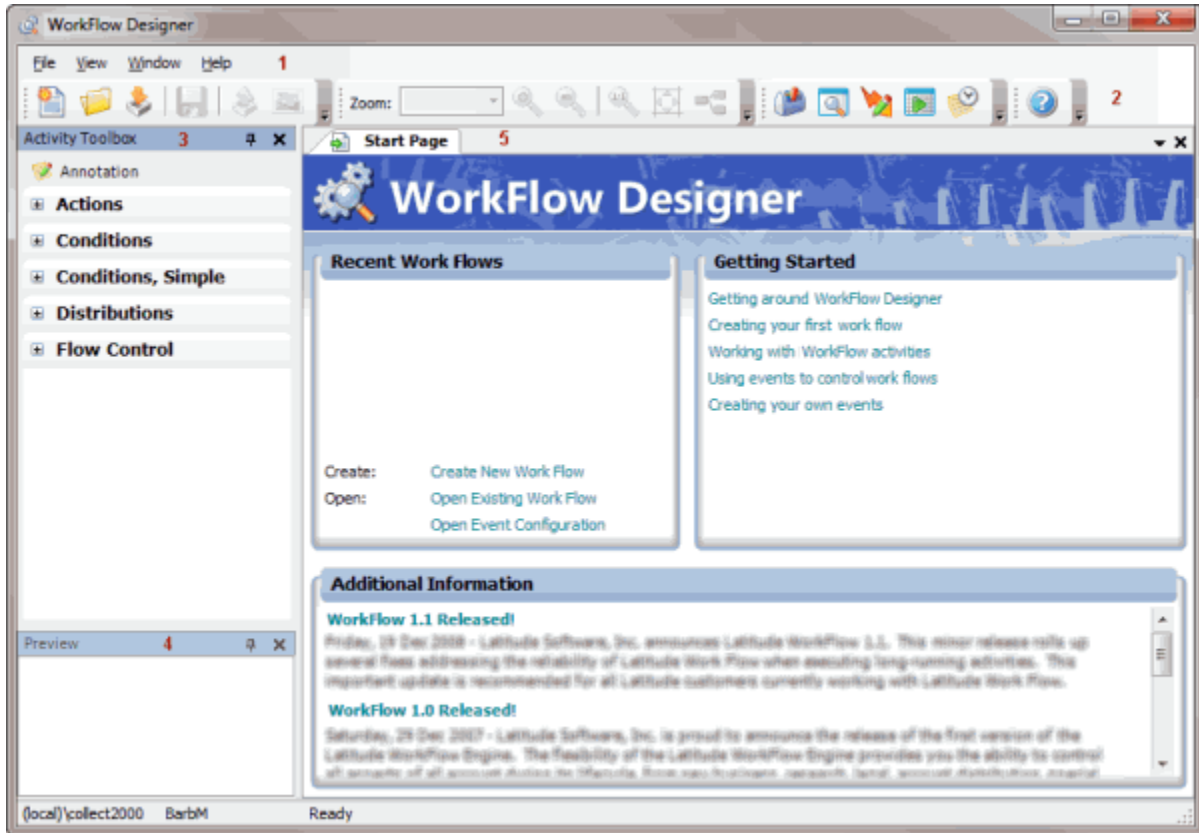
Note: To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

4. Click **Okay**. The **WorkFlow Designer** window appears.



Overview of WorkFlow Designer Window

Use the **WorkFlow Designer** window to create and manage events, create workflows, evaluate account activity within workflows, control workflows, and review workflow history.



1. **Menu bar:** Displays available submenus and commands for the window. For more information, see the [Menu options](#) section in this topic.
2. **Toolbar:** Displays available shortcuts for the window. For more information, see the [Toolbar](#) section in this topic.
3. **Activity Toolbox:** Displays the workflow activity toolbox for creating workflows. The toolbox consists of the following:
 - Actions:** Defines the actions to perform on the accounts in the workflow. For more information, see [Action Activities](#).
 - Conditions:** Defines the required conditions for performing an action. For more information, see [Condition Activities](#) and [Simple Condition Activities](#).
 - Distributions:** Defines the distribution of accounts across desks. For more information, see [Distribution Activities](#).
 - Flow control:** Defines the method for processing accounts through a workflow. For more information, see [Flow Control Activities](#).
4. **Preview pane:** Displays a preview of the workflow.
5. **Tabs:** Displays tabs for startup information and the workspace for creating and configuring workflows.

Menu options

File menu

Option	Description
Create New Work Flow	Opens a new tab to allow you to create a workflow.
Open Existing Work Flow	Opens an existing workflow in a new tab.
Import Work Flow	Imports a workflow file and creates a workflow from it.
Save Current Work Flow	Saves your changes to the selected workflow.
Save Current Work Flow As...	Saves the selected workflow under a different name and retains the original workflow.
Rename Current Work Flow	Renames the selected workflow.
Save All	Saves your changes for all the open tabs.
Export Work Flow to File	Exports the workflow to a ".lwf" Work Flow file.
Export Work Flow to Image	Exports the workflow to an image file.
Close	Closes the selected tab.
Exit	Closes the WorkFlow Designer program.

View menu

Option	Description
Zoom In	Resizes the workflow to a larger view.
Zoom Out	Resizes the workflow to a smaller view.
Actual Size	Returns the workflow to its original size.
Fit Page	Resizes the workflow to fit the viewing area.
Layout Work Flow	Arranges activities in the workflow into an easy-to-read layout.

Option	Description
Collapse All Properties	Hides the properties for all activities in the workflow.
Expand All Properties	Shows the properties for all activities in the workflow.
Show Iconic	Displays the activities as icons.
Work Flow Properties	Displays the properties for the selected workflow.
Toolbars	Opens a submenu to allow you to specify the toolbars to show or hide.

Window menu

Option	Description
Activity Tool Box	Displays the Activity Toolbox.
Preview	Displays a preview of the workflow.
Work Flow Query Actions	Opens the WorkFlow Query Action Wizard .
Event Configuration	Opens the Event Configuration tab.
Start Page	Opens the Start Page tab.


Help menu






Option	Description
About WorkFlow	Displays information about the WorkFlow Designer program.
Open Help File	Displays the documentation for Workflow Designer.

Toolbar




There are four toolbars available. To display a toolbar, from the **View** menu, click **Toolbars** and then click the toolbar name. Repeat this step to hide the toolbar.

WorkFlow






Icon	Description
	Opens a new tab to allow you to create a workflow.

Icon	Description
	Opens an existing workflow in a new tab.
	Imports a workflow file and creates a workflow from it.
	Saves your changes to a workflow or event.
	Exports the workflow to a ".lwf" Workflow file.
	Exports the workflow to an image file.


View

Icon	Description
	Changes the magnification of the workflow.
	Resizes the workflow to fit the viewing area.
	Arranges activities in the workflow into an easy-to-read layout.

Window

Icon	Description
	Displays the Activity Toolbox.
	Displays a preview of the workflow.
	Opens the Event Configuration tab.
	Opens the WorkFlow Query Action Wizard .
	Opens the WorkFlow History tab.

Help

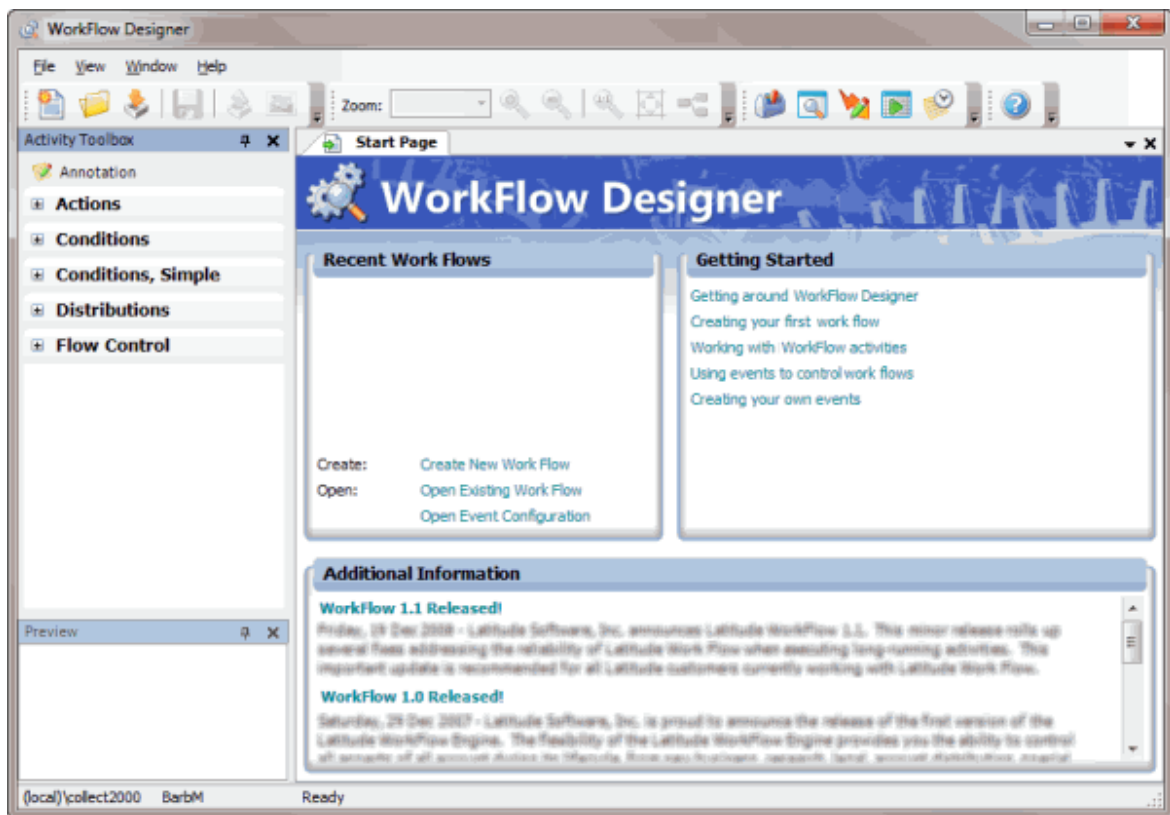
Icon	Description
	Displays the documentation for Workflow Designer.

View the Start Page

Use the **Start Page** tab to create or open a workflow, configure an event, or view information regarding WorkFlow Designer. The **WorkFlow Designer** window opens with the **Start Page** tab displayed. You can leave this tab open while working in the window or close it.

To view the Start Page

- From the **Window** menu, click **Start Page**. The **Start Page** tab appears.



Recent Work Flows section: Displays links to allow you to open workflows you viewed recently, create a workflow, open an existing workflow, and display the **Event Configuration** tab.

Getting Started section: Displays links to help topics that assist you in getting started with WorkFlow Designer.

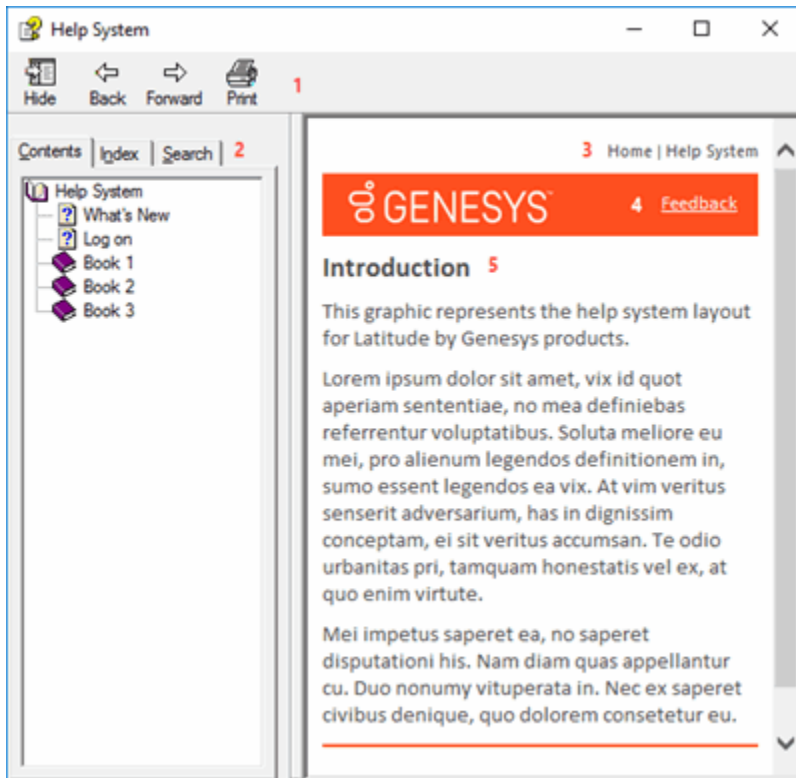
Additional Information: Displays information regarding WorkFlow Designer release history.

Help Overview

Workflow Designer help provides you with information for using Workflow Designer. Use the table of contents, index, and search features to locate and view a help topic.

To open help

In menu bar, click the **Help** option and then click **Open Help File**. The **Workflow Designer Help** window appears.



Tip: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

1. **Toolbar:** Displays options for the help window.
2. **Tabs:** Displays the following:

Contents: Displays the table of contents. To display a topic in the **Content** pane, expand a book and then click the link.

Index: Displays the index. To display a topic in the **Content** pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.

Search: Displays the [search feature](#). To display a topic in the **Content** pane, type a keyword or phrase in the box and then press **Enter**. In the search results, click the link.

3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.
4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.

5. **Content pane:** Displays the contents of a topic. To view the **Content** pane menu, right-click in the **Content** pane.

Search feature

You can use the search feature to search for topics that contain words or phrases that you specify. You formulate a search query following a specific [set of rules](#). You can include [wildcard expressions](#), [Boolean operators](#), and [nested expressions](#) in your search query. A list of topics that match your search criteria appear in the search results. When you click a topic title in the search results, the content of that topic appears in the **Content** pane.

Search syntax

The basic rules for formulating search queries are:

- Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.
- You cannot search for a single character or the following reserved words: an, and, as, at, be, but, by, do, for, from, have, he, in, it, not, of, on, or, she, that, the, there, they, this, to, we, which, with, you.
- The search engine ignores punctuation marks and special characters such as @#\$%^&()=+[]\.
- Enclose phrases and terms that include a period (such as a file name with an extension) in double quotation marks.

Wildcard expressions

Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. A question mark represents a single character, while an asterisk represents one or more characters.

Search for...	Example	Result
Topics with text that starts with one or more specified characters and ends in any character or number of characters	log or log*	Returns all topics with text that starts with the specified characters (for example, log, logon, logging).
Topics with text that starts with the specified characters, has a single character that can be anything, and ends in the specified characters	32?57	Returns all topics with text that has any character where you placed a question mark (for example, 32?57 returns 32257, 32457, and 32857).
Topics that contain all the words specified, in any order or placement within the topic	account status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."
Topics that contain the specified phrase	"account status"	Returns all topics with account status as a phrase. For example, the search returns topics with "the account status..." but not "the status of the account..."

Boolean operators

Boolean operators (AND, OR, NOT, NEAR) allow you to create a relationship between terms. If you don't specify an operator, the system uses AND by default.

Search for...	Example	Result
AND	account AND status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."
OR	account OR status	Returns all topics with either account or status, or both.
NOT	account NOT status	Returns all topics with account but not status.
NEAR	account NEAR status	Returns all topics where account is within eight words of status.

Nested expressions

Nested expressions allow you to perform complex searches. For example, queue AND ((collector OR clerical) not supervisor) finds topics containing queue and collector but not supervisor, or containing queue and clerical but not supervisor. As with mathematical expressions, the system evaluates expressions in parentheses first. If there is no parenthesis, the system evaluates the expression from left to right. For example, queue NOT (clerical OR supervisor) finds topics containing queue but not clerical or supervisor. Queue NOT clerical OR supervisor finds topics containing queue but not clerical, or topics containing supervisor.

WorkFlow Engine

WorkFlow Engine

WorkFlow Engine runs on a server and is responsible for processing the accounts in the workflows. Your organization schedules the WorkFlow Engine to run at specified times using SQLAgent or Windows Task Manager. The engine runs for the specified time period (the default is one hour) or until there are no accounts in the event queue, whichever comes first.

Stages

There are three stages of processing when WorkFlow Engine runs.

Stage 1: Adds user-defined events to the event queue. WorkFlow Engine checks to see whether there are any user-defined events to process and if so, adds the accounts for those events to the event queue.

Note: WorkFlow Engine adds system events to the event queue as the events occur.

Stage 2: Processes the event queue. WorkFlow Engine reads the event queue in the order it added the accounts to the event queue. If set, the event configuration determines the initial priority for each workflow.

Stage 3: Starts the workflows. WorkFlow Engine starts the workflow and then creates lists of accounts for each activity or step of the workflow. The WorkFlow Engine Settings permission determines the number of accounts in an activity. This setting prevents WorkFlow Engine from updating too many accounts in a single process, and possibly causing concurrency issues. WorkFlow Engine passes the list of accounts to the activity for processing. When activity processing completes, WorkFlow Engine moves the accounts to the steps specified in the list, cleans up the used resources, and runs through the event queue again.

WorkFlow Permissions and Policies

Your organization configures WorkFlow permissions and policies in Latitude for users who are responsible for managing workflows. The WorkFlow folder contains the permissions and policies. For more information, see "Permissions and Policies" in the *Latitude* documentation.

WorkFlow Engine Settings

The WorkFlow Engine Settings permission contains policies that determine how long the engine runs, the maximum number of accounts to process, and where to send error reports. Following are the default values that rarely require changes. If you have concerns about these settings, contact Latitude by Genesys Support.

WorkFlow Engine Settings

Applies To: System Not Configured

Description: Enabled Disabled

Settings for the WorkFlow Engine.

The following setting controls how long the WorkFlow Engine will continue to execute in a single invocation. The WorkFlow Engine will continue to execute activities for as long as there are accounts in a Runnable state until this duration is exceeded.

Execution Duration [min]:

The following settings control the maximum number of accounts that are to be processed by the WorkFlow Engine when executing an activity based on the type of activity.

Action Activities:

Condition Activities:

Query Activities:

Switch Activities:

The following setting specifies the email address that is to receive any error reports generated from the WorkFlow Engine.

Email Address:

Email Settings

If you plan to use a "send email" activity, configure the email settings in Latitude. For more information, see the "SMTP Permission" topic in the *Latitude* documentation.

Modify the WorkFlow Engine Configuration File

Before starting WorkFlow Engine, modify the WorkFlow Engine configuration file to point to the correct Latitude database and pass the corresponding SQL administrator logon credentials.

Note: WorkFlow Engine runs on a server and points to a single database, typically. If you have multiple databases, create a separate directory on the server for each database instance and then copy the WorkFlow Engine executable and its configuration file to those directories. Modify each configuration file to point to the correct Latitude database and pass the corresponding SQL administrator logon credentials.

To modify the WorkFlow Engine configuration file

1. Open the "C:\Program Files (x86)\Interactive Intelligence\Interaction Collector\bin" folder and double-click **WorkFlow.Engine.exe.config**. The WorkFlow Engine configuration file opens in Notepad.
2. Locate the <connectionstrings> section and modify it as follows:

```
<connectionStrings>
  <add name="WorkFlow.Engine.Properties.Settings.ConnectionString"
    connectionString="Data Source=.;Initial Catalog=Collect2000;Integrated
Security=True;Application Name=&quot;WorkFlow Engine&quot;;"
    providerName="System.Data.SqlClient" />
</connectionStrings>
```

3. Save your changes and close Notepad.

Start WorkFlow Engine

You can start WorkFlow Engine manually, or start it using a SQLAgent or Windows Task Manager job your organization scheduled to run at a specific time. We recommend that you schedule the WorkFlow Engine to start automatically.

To start WorkFlow Engine

Do one of the following:

- To start WorkFlow Engine automatically, create a SQLAgent or Windows Task Manager job and specify the schedule for starting WorkFlow Engine.
- To start WorkFlow Engine manually, open the "C:\Program Files (x86)\Interactive Intelligence\Interaction Collector\bin" folder and double-click **WorkFlow.Engine.exe**.

WorkFlow Engine starts and then runs in the background.

WorkFlow Engine considerations

Consider the following information regarding WorkFlow Engine:

- The time of day and frequency in which WorkFlow Engine runs could affect server performance.
- Events and activities can enter the event queue at any time; however, WorkFlow Engine processes them during the next scheduled session.
- Do not schedule WorkFlow Engine to run at the same time as your system backup is running.
- For Latitude by Genesys-hosted systems, Latitude by Genesys schedules WorkFlow Engine to run twice daily.

Process WorkFlow Activities

Once the event queue is empty, WorkFlow Engine starts processing a single activity. WorkFlow Engine determines which activity to process based on which activity list has the oldest accounts waiting and eligible for processing.

The priority that the event, workflow, or both set, influences the age of the account (how long the account has been waiting to process; first-in, first-out).

A workflow has the following account states:

Runnable: Account is eligible for processing.

Waiting: Account is not eligible for processing until a specific date and time pass.

Paused: Account is not eligible for processing until the amount of time set for pausing passes.

Parent: Account has started a workflow activity with the Concurrent property set to false. The account is not eligible for processing until that workflow activity has completed or calls a Resume Parent activity.

Once an activity starts, WorkFlow Engine determines the accounts to process and hands them off to the activity. When the activity finishes processing the accounts, WorkFlow Engine repeats the cycle for user-defined events. WorkFlow Engine continues to cycle between processing activities and events.

WorkFlow Events

WorkFlow Events

The WorkFlow Engine allows processes (events) to occur behind the scenes. These events determine how accounts move through Latitude. WorkFlow events provide flexibility as to how and why workflows start.

Events

System events and user-defined events both qualify accounts and move them into the event queue. Depending on whether your organization configured an event at the system; class of business; or customer level; some workflows start and other workflows stop or pause. When the WorkFlow Engine session starts, The WorkFlow Engine processes events on a first-in, first-out (FIFO) basis (all priorities being equal).

System events

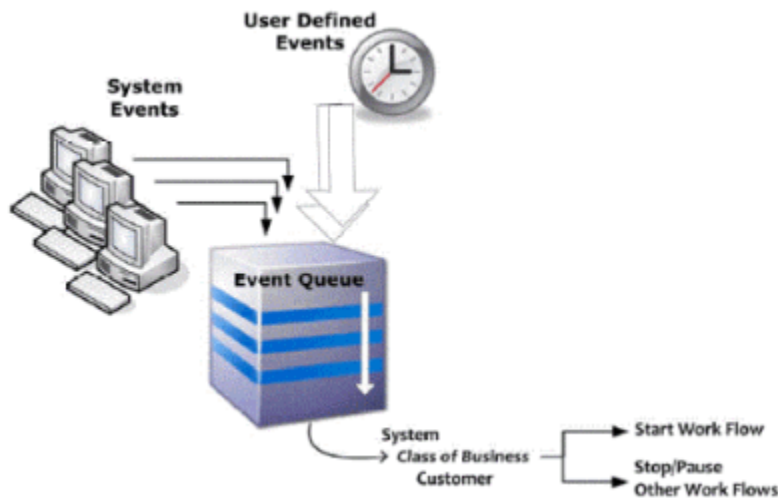
Latitude triggers system events at the database level. System events push accounts into the event queue one at a time as activity occurs on the accounts. Examples of system events include: new business, desk changes, promises added, payments added, and accounts closed. These events come pre-defined with WorkFlow Designer and you cannot change what triggers them. However, you can define the workflow that each event calls.

User-defined events

Users create user-defined events and the conditions that determine which accounts the event includes. The WorkFlow engine triggers these events based on the frequency specified in the event configuration, which is once each day, typically. The system adds the accounts that meet these static event conditions to the event queue.

Event queue

The event queue serves as a holding area for events after they occur but before the WorkFlow engine processes them. When a system or user-defined event occurs, The WorkFlow Engine records the account numbers, event ID, and current date and time in the event queue. The WorkFlow Engine processes each event in the event queue and starts the appropriate workflows for each account. Processing continues until the event queue is empty.



Activities


A workflow creates activities for accounts moving through the workflow and the activities process on a FIFO basis also. The WorkFlow Engine alternates between processing events and activities until there are no more to process.

View Event Configurations

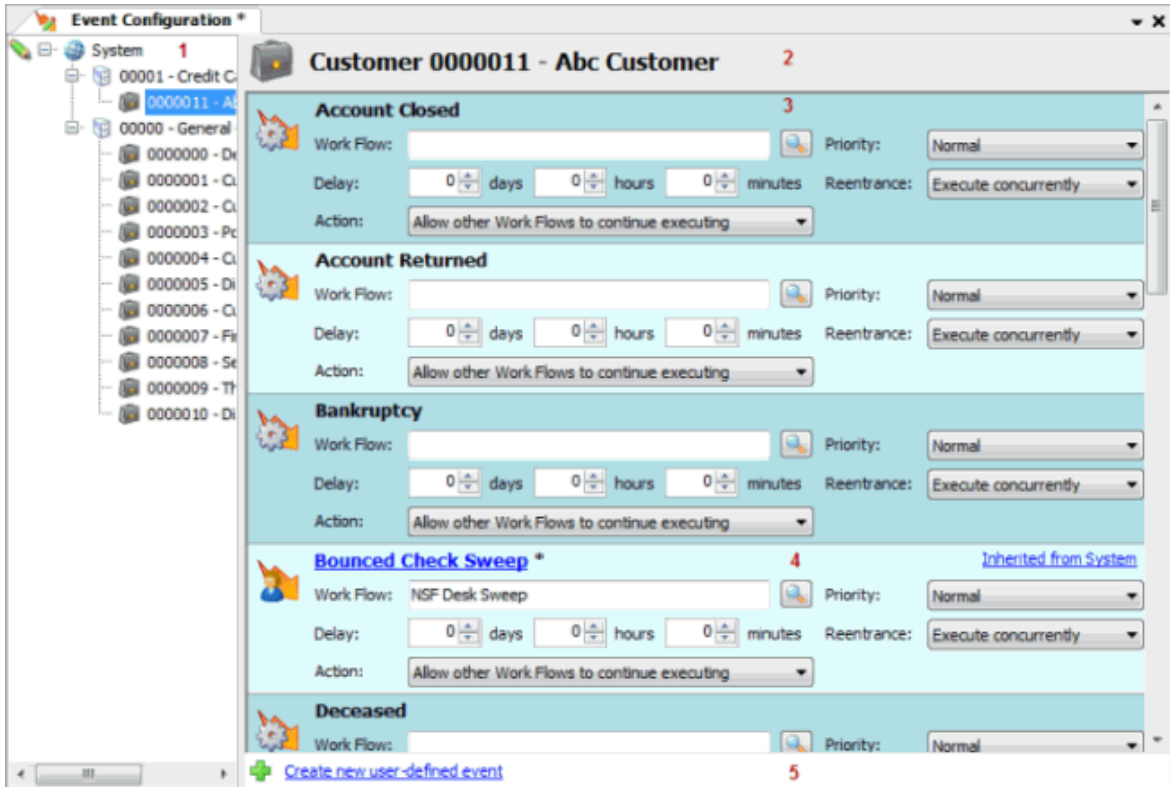
Use the **Event Configuration** tab to view and manage system and user-defined events. You cannot delete system or user-defined events. However, events without workflows attached do not qualify accounts for activities. Therefore, we recommend that you delete the workflow and conditions from events no longer used.

To view event configurations

Do one of the following:

- To open the **Event Configuration** tab from the menu, from the **Window** menu, click **Event Configuration**.
- To open the **Event Configuration** tab from the **Window** toolbar, click the Event Configuration icon .

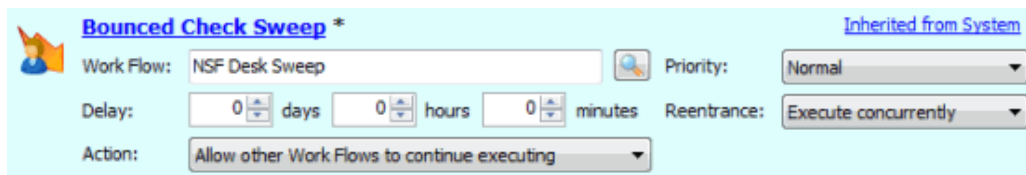
The **Event Configuration** tab appears.



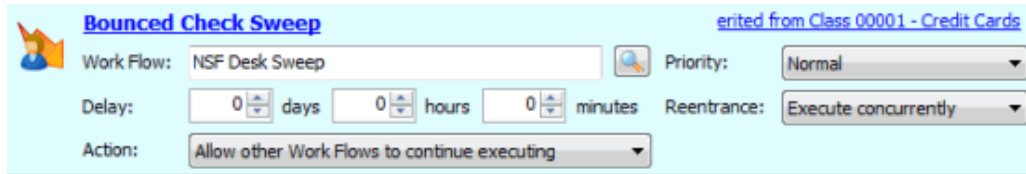
1. **Navigation tree:** Contains nodes for the system, class of business, and customer event levels. The **System** node contains a node for each class of business. Each class of business node contains its customers. Each class of business and customer inherits the events assigned at the system level, unless the events change at the class of business or customer level. When you click a class of business or customer, the events applied at that level display.

Notes:

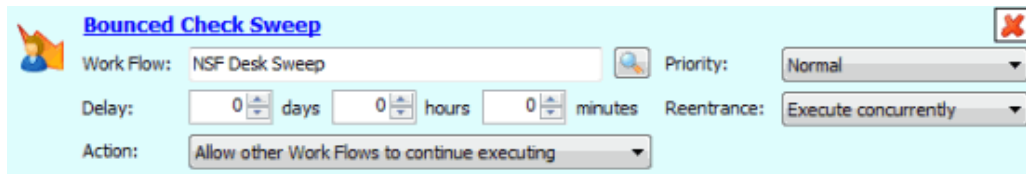
- If you didn't customize an event at the class of business or customer level, the message, "Inherited from System" displays when you select a class of business or customer.



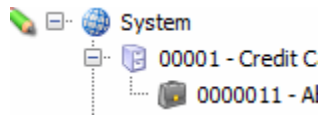
- If you customize an event at the class of business level, the class of business name displays when you select a customer within that class of business.





- If you customize an event at the customer level, a red "X" appears, which allows you to delete the event configuration at the customer level. Upon deletion, the customer inherits the event at the class of business or system level.



- If you attach a workflow to an event at a system, class of business, or customer level, a pencil icon appears next to the corresponding node.



2. **Events pane:** Displays system and user-defined events in alphabetical order. This display order has no effect on the order in which events process.
3. **System event:** Events provided with WorkFlow Designer. You can define the workflow that each event calls; however, you cannot change what triggers the event. The System Event icon  indicates a system event, and the event name appears in black.
4. **User-defined event:** Events that users define. The User-defined Event icon  indicates a user-defined event, and the event name appears in blue.
5. **Link:** Opens a new tab to allow you to create a user-defined event.

System Events

WorkFlow designer comes with pre-defined events called "system events." You can modify the settings for system events or associate a workflow to them. However, you cannot create conditions for the events. Accounts qualify for system events through triggers in the Latitude database when specific activities occur on an account.

Note: To stop all workflows when a system event occurs, don't attach a workflow to, or delete a workflow from the event, and choose **Stop all other work flows** in the event configuration.

The WorkFlow Engine processes the following occurrences as system events. This list includes the occurrences in Latitude that trigger a system event.

System Event	Latitude Trigger
Account Charged-Off	None. ARM Division Professional Services Organization can trigger this event when creating bridges.
Account Closed	Account queue level changes to 998.
Account Linked	User links one account to another account.
Account Reactivated from Charge-off	None. ARM Division Professional Services Organization can trigger this event when creating bridges.
Account Returned	Account queue level changes to 999.
Address Confirmed	User flags an address as confirmed.
Address Updated	User updates an account address.
AIM Final Recall	User or system issues a final recall for an AIM account.
AIM Placement	User places an account with an outside collection agency or attorney.
Arrangement Failed	Customer didn't pay on the payment due date.
Bankruptcy	User adds or updates a bankruptcy record that has a filed or discharged status and a valid bankruptcy chapter number.
Care Closed	User changes the status of a care record to "closed."
Care Confirmed	User flags a care record as confirmed.
Care Created	User adds a care record to an account.
Care Unconfirmed	User has not flagged a care record as confirmed, or has removed the flag.
Care Updated	User updates a care record.
Complaint Closed	User changes the status of a complaint record to "closed."
Complaint Created	User adds a complaint record.
Complaint Deleted	User deletes a complaint record.

System Event	Latitude Trigger
Complaint Reopened	User changes the status of a complaint record to "reopened."
Complaint Updated	User updates a complaint record.
Correspondence Address Selected	User flags an address as a correspondence address.
Custom Complaint Owner Updated	User updates the owner of a complaint.
Debt Management Cleared or Deleted	User cleared or deleted a debt management record.
Debt Management Created	User creates a debt management record.
Debt Management Updated	User updates a debt management record.
Deceased	Deceased record contains a valid date of death.
Deceased Date Filed Updated/Entered	User adds or changes the date the client filed a claim against the deceased customer's estate.
Desk Changed	User changes the assigned desk.
Direct Debit Arrangement Entered	User adds a Direct Debit payment arrangement.
Direct Debit Mandate Cancelled	
Direct Debit Mandate Created	
Dispute Closed	User changes the status of a dispute record to "closed."
Dispute Created	User adds a dispute record.
Dispute Deleted	User deletes a dispute record.
Dispute Updated	User updates a dispute record.
Documentation Attached	User attaches a document to an account.

System Event	Latitude Trigger
DPA Screen Completed	User completes the DPA Validation dialog box and indicates that the caller's information is valid.
First Contacted	Total contacts on the account change from 0 to 1.
I&E Created	User adds an Income and Expenditure record.
New Address Created	User adds an address to an account.
New Business	User or the system adds an account to the database.
Payment Received	Pay history record with a PU, PC, or PA payment type added.
Payment Reversed	Pay history record with a PUR, PCR, or PAR payment type added.
Post-Date Check Entered	Post-dated check added.
Post-Date Credit Card Entered	Post-dated credit card added.
Promise Broken	Master broken promise date changes.
Promise Canceled	Promise record canceled.
Promise Entered	Promise record added.
Promise Off Hold	Promise hold removed.
Promise On Hold	Promise hold placed.
Proof Received	User flags a care case to indicate that your organization received proof of the care issue
Service History Info Returned	
Status Changed	Account status changed.

User-defined Events

User-defined Events

User-defined events are queued based on the state of the account at a particular point in time. A user-defined event contains conditions that determine which accounts are eligible. At a specified frequency,

the WorkFlow Engine processes the event for all accounts between the minimum age and the maximum age. The WorkFlow Engine adds accounts that meet the criteria to the event queue. The reoccurrence age specifies how many days must pass before that event queues again for an account that continues to meet the age requirements and fit the criteria.


You can also queue user-defined events manually through a sweep process in SQL, or from within a workflow.

Note: If you didn't specify any condition criteria for a user-defined event, the event never runs.

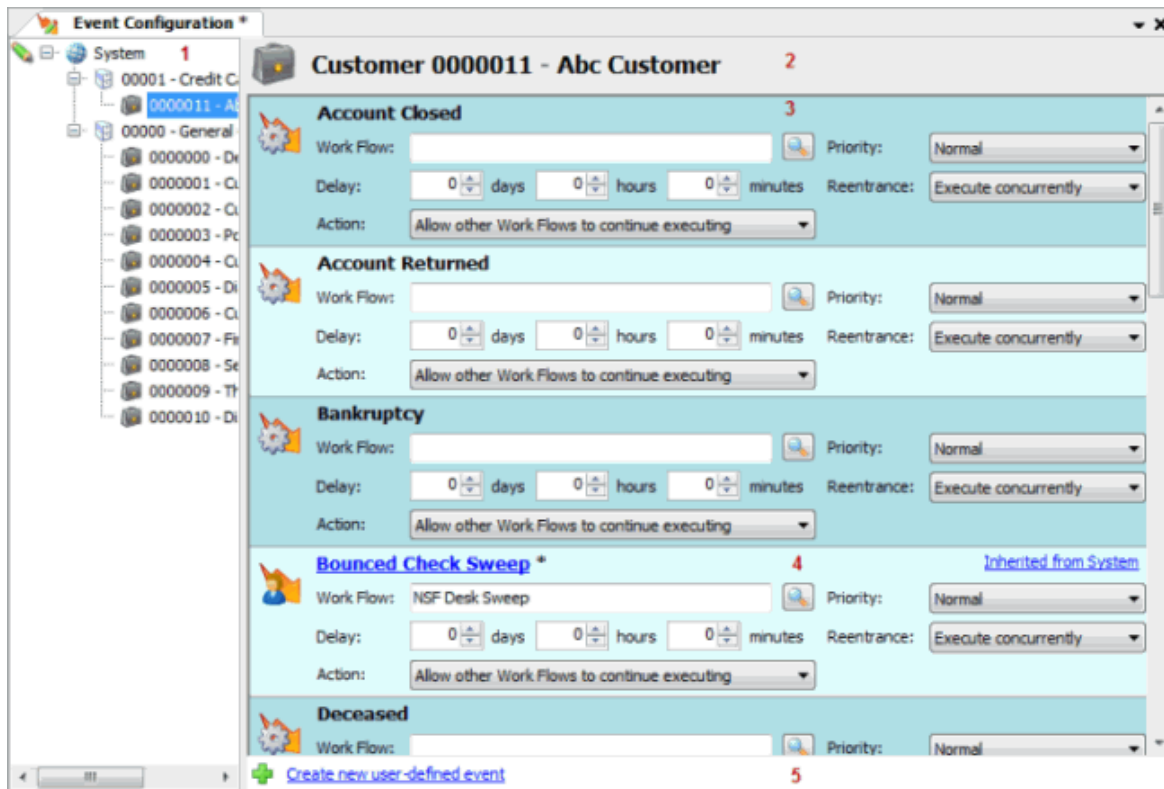
Create a User-defined Event

Use the **Event Configuration** tab to create a user-defined event.

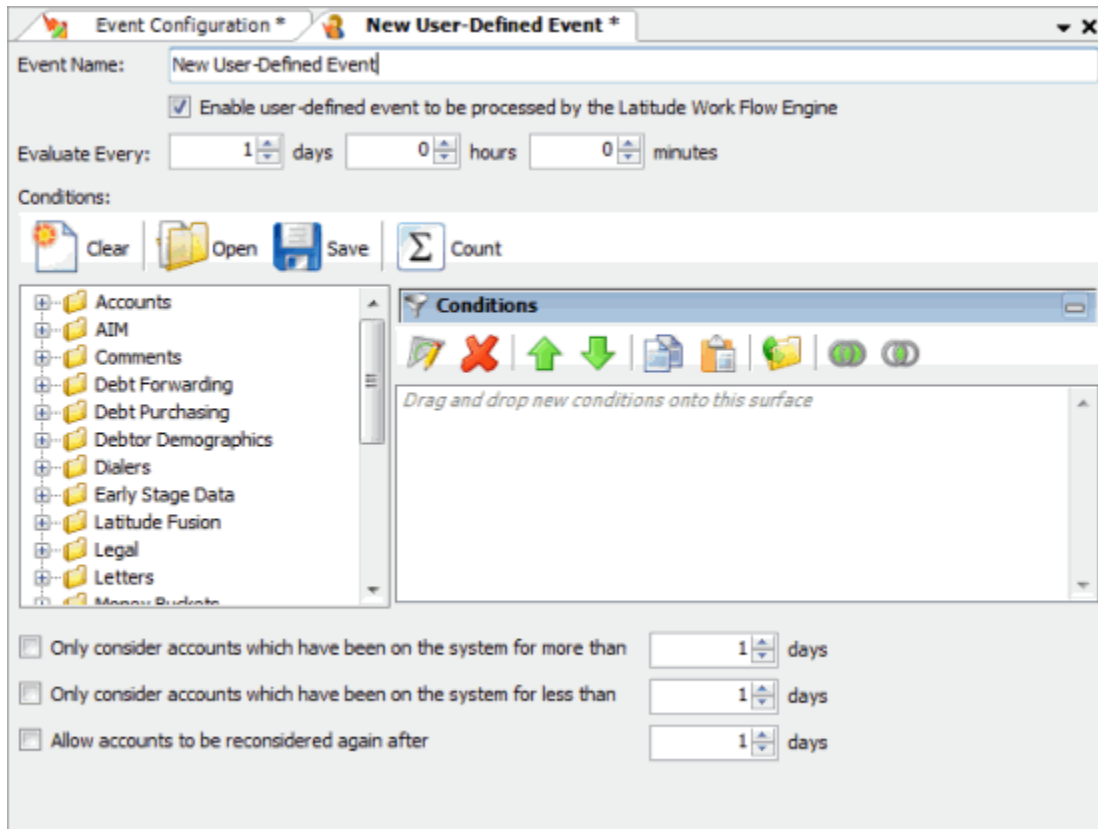
To create a user-defined event

1. Do one of the following:
 - To open the **Event Configuration** tab from the menu, from the **Window** menu, click **Event Configuration**.
 - To open the **Event Configuration** tab from the **Window** toolbar, click the Event Configuration icon .

The **Event Configuration** tab appears.

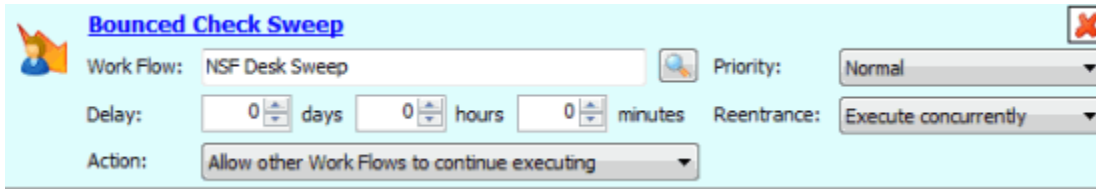


2. In the lower section of the tab, click **Create new user-defined event**. The **New User-Defined Event** tab appears.



3. In the **Event Name** box, type a unique name for the event.
4. In the **Evaluate Every** boxes, set the frequency in which to evaluate accounts for eligibility.
5. Specify the conditions for the event. For more information, see [Create a User-defined Event Condition](#).
6. In the lower section of the tab, do the following:
 - To evaluate accounts that have been on the system for more than a specific number of days only, click the **Only consider accounts which have been on the system for more than** check box and then specify the number of days.
 - To evaluate accounts that have been on the system for less than a specific number of days only, click the **Only consider accounts which have been on the system for less than** check box and then specify the number of days.
 - To reevaluate accounts after a specific number of days, click the **Allow accounts to be reconsidered again after** check box and then specify the number of days.
7. In the **Window** toolbar, click **Save**. WorkFlow Designer renames the **New User-Defined Event** tab to the specified event name.
8. Click the **X** to close the event tab. The user-defined event appears on the **Event Configuration** tab.
9. In the **Navigation** tree, click the level to apply the event to (system, class of business, or customer).

10. Locate the user-defined event in the **Events** pane.



Work Flow: Workflow assigned to an account when it meets event conditions.

Delay: Time between the occurrence of the event's eligibility and its placement into the event queue (wait time between eligibility and queue placement).

Action: Determines what happens to an account triggered for this workflow that is processing currently in another workflow.

Priority: Determines how often Workflow Designer processes accounts that are eligible for the event in comparison to other events.

Reentrance: Determines what happens to an account that is already processing in the workflow that is triggering the event.

Execute concurrently: Account starts running through the workflow again, allowing multiple instances of the account within the workflow.

Restart work flow: Stops the account's current progression through the workflow and starts a new instance of the account at the beginning of the workflow.

Do not start work flow: Allows the account to continue processing in the currently running workflow; doesn't start a new instance of the account.


Resume paused work flow: Resumes a paused workflow for the existing instance of the account. The account continues through the workflow, but doesn't start a new instance of the account. If there are no instances, the account starts in the workflow.

11. Complete the information and then click **Save**.

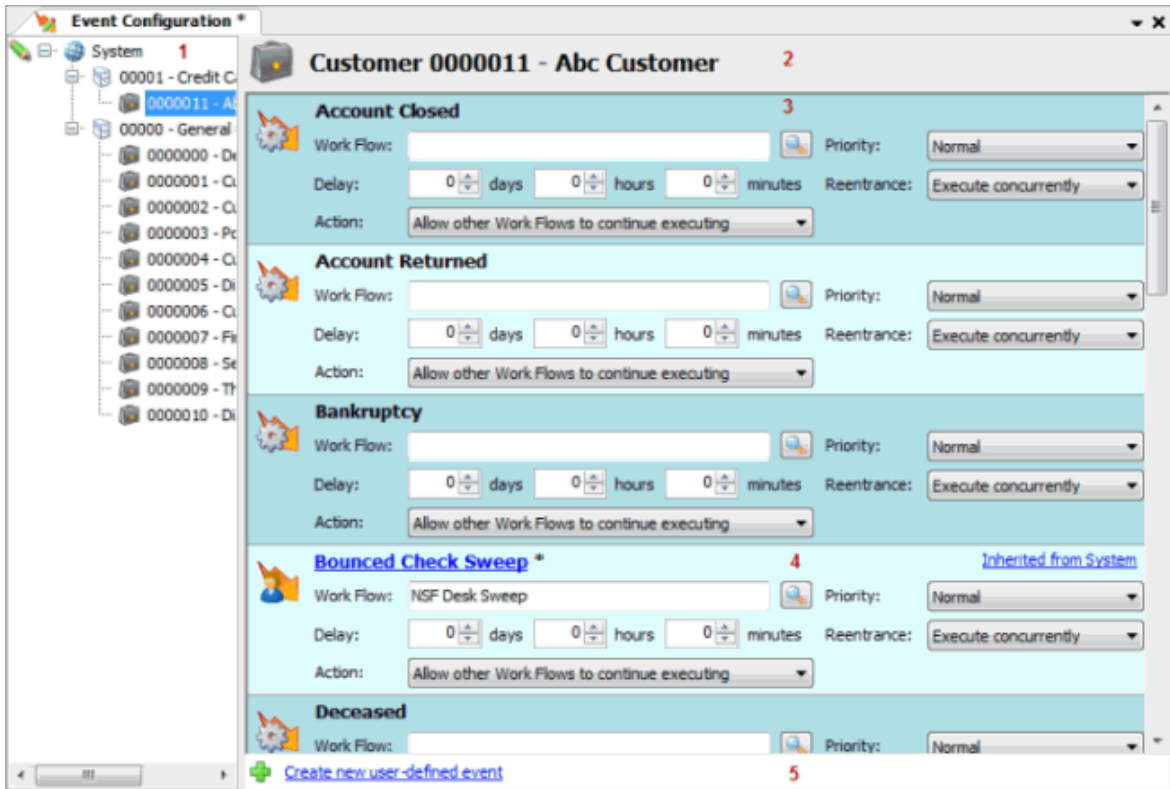
Modify a User-defined Event

Use the **[Event Name]** tab to modify a user-defined event.

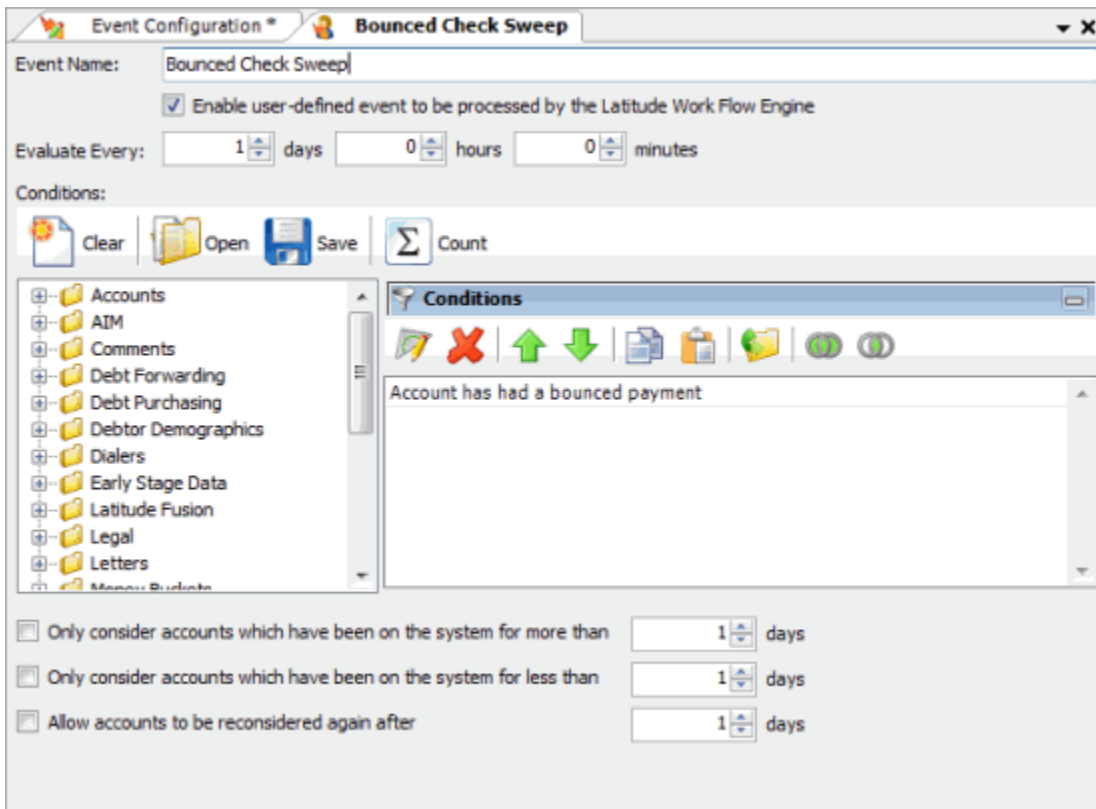
To modify a user-defined event

1. Do one of the following:
 - To open the **Event Configuration** tab from the menu, from the **Window** menu, click **Event Configuration**.
 - To open the **Event Configuration** tab from the **Window** toolbar, click the Event Configuration icon .

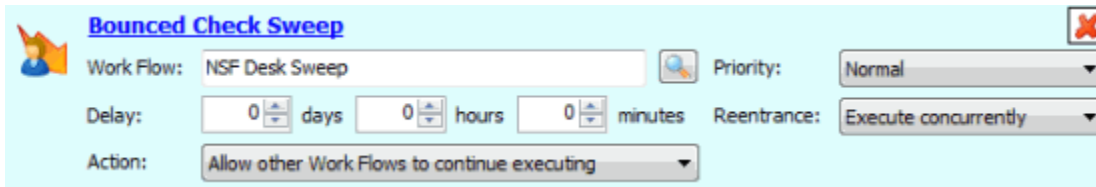
The **Event Configuration** tab appears.



2. In the **Events** pane, click the user-defined event name (which appears in blue). The **[Event Name]** tab appears.



3. Modify the information as necessary. For more information about modifying conditions, see [Modify a User-defined Condition](#).
4. In the toolbar of the **WorkFlow Designer** window, click **Save**.
5. Click the **X** to close the event tab.
6. In the **Events** pane, modify the information as necessary.



Work Flow: Workflow assigned to an account when it meets event conditions.

Delay: Time between the occurrence of the event's eligibility and its placement into the event queue (wait time between eligibility and queue placement).

Action: Action to process on an account in this workflow that is running in another workflow.

Priority: Determines how often Workflow Designer processes accounts that are eligible for the event in comparison to other events.


Reentrance: Action to process on an account that is already running within this same workflow.

7. Complete the information and then, in the toolbar of the **WorkFlow Designer** window, click **Save**.

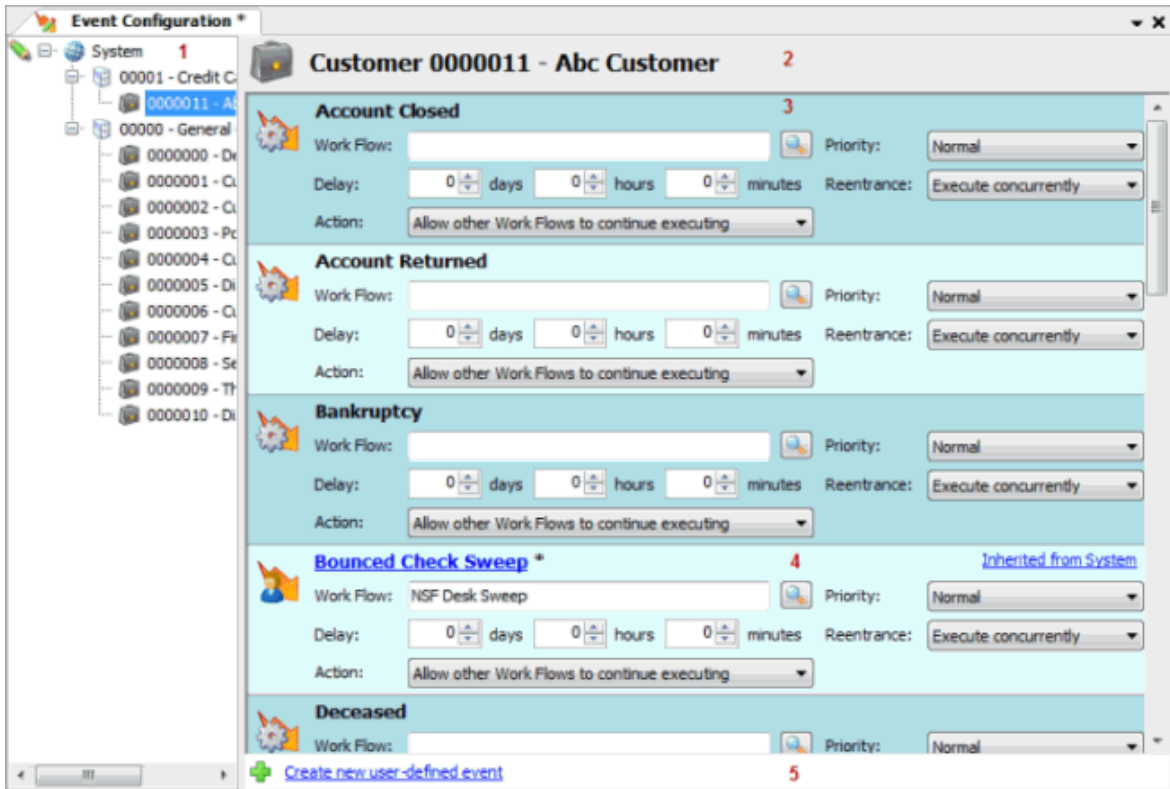
Add a Workflow to an Event

Use the **Open WorkFlow** dialog box to add a workflow to an event

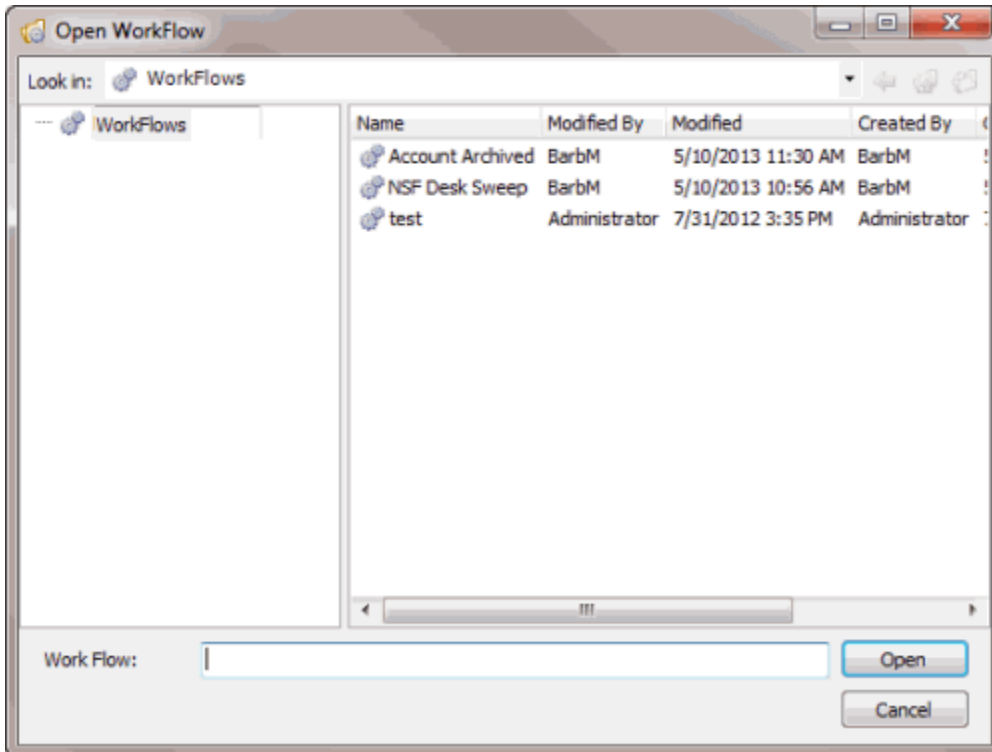
To add a workflow to an event

1. Do one of the following:
 - To open the **Event Configuration** tab from the menu, from the **Window** menu, click **Event Configuration**.
 - To open the **Event Configuration** tab from the **Window** toolbar, click the Event Configuration icon .

The **Event Configuration** tab appears.



- In the **Events** pane, click the Search icon next to the **Work Flow** box. The **Open WorkFlow** dialog box appears.




3. Click the workflow to add to the event and then click **Open**. WorkFlow Designer populates the **Work Flow** box in the **Events** pane with the specified workflow.
4. In the **Window** toolbar, click **Save**.

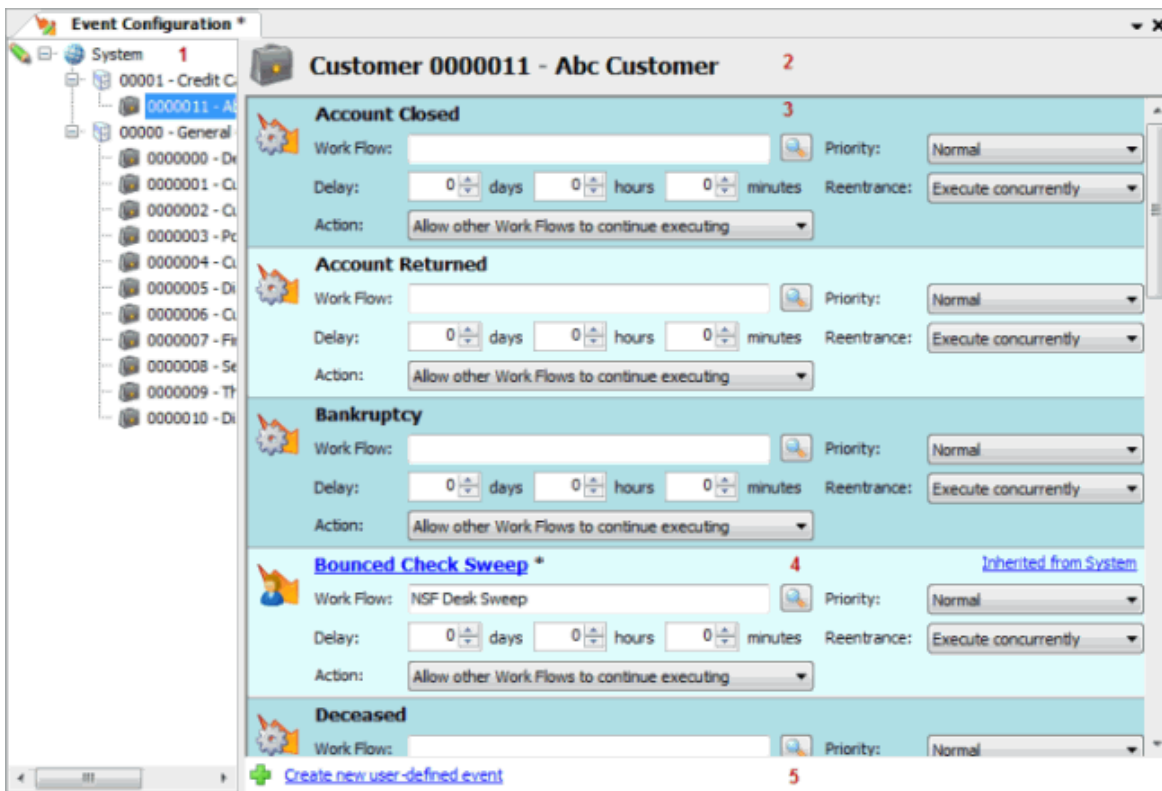
Delete a Workflow From an Event

Use the **Open WorkFlow** dialog box to delete a workflow from an event

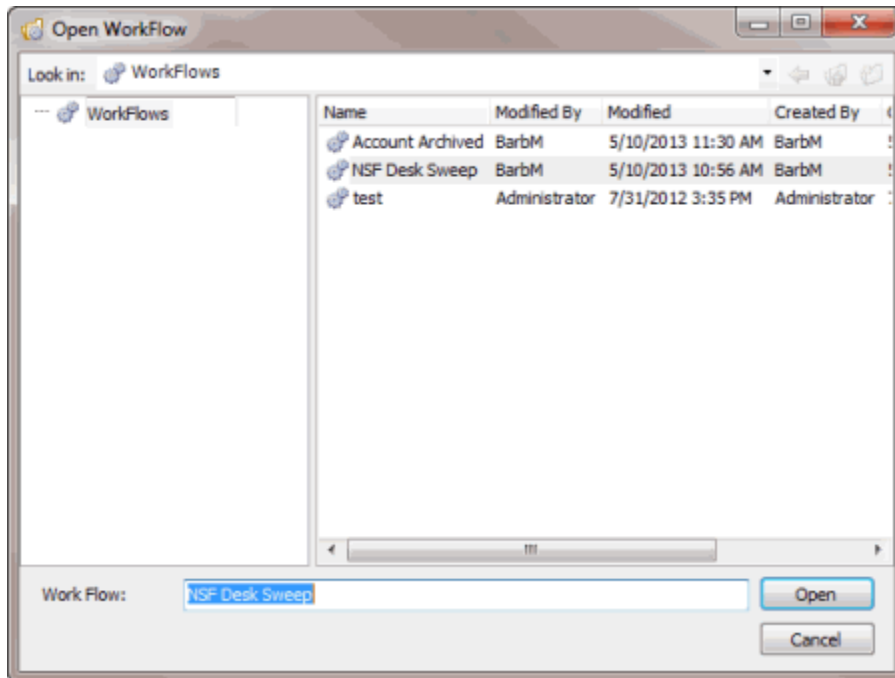
To delete a workflow from an event

1. Do one of the following:
 - To open the **Event Configuration** tab from the menu, from the **Window** menu, click **Event Configuration**.
 - To open the **Event Configuration** tab from the **Window** toolbar, click the Event Configuration icon .

The **Event Configuration** tab appears.



2. In the **Events** pane, click the Search icon next to the **Work Flow** box. The **Open WorkFlow** dialog box appears.



3. Press the **Delete** key to clear the **Work Flow** box and then click **Open**. WorkFlow Designer deletes the workflow from the **Work Flow** box in the **Events** pane.
4. In the **Window** toolbar, click **Save**.

User-defined Event Conditions

User-defined Event Conditions

Use the **Conditions** pane on an event tab to specify the criteria for accounts to include in an event.

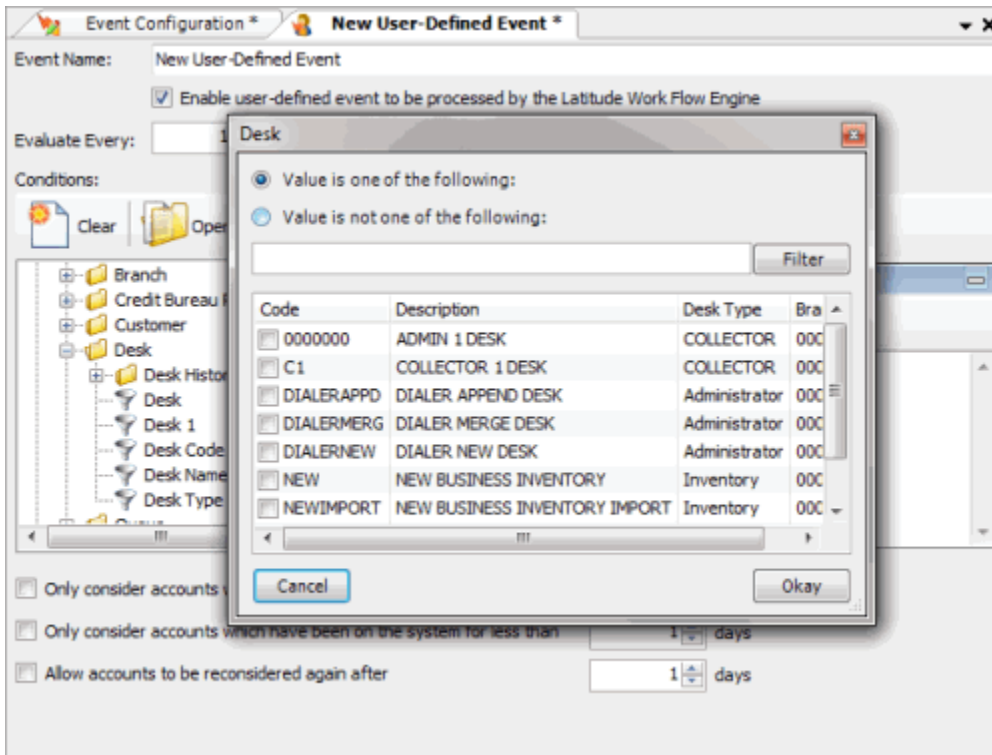
Create a User-defined Event Condition

Use the **Conditions** pane of an event tab to specify the criteria for which accounts to include in an event.

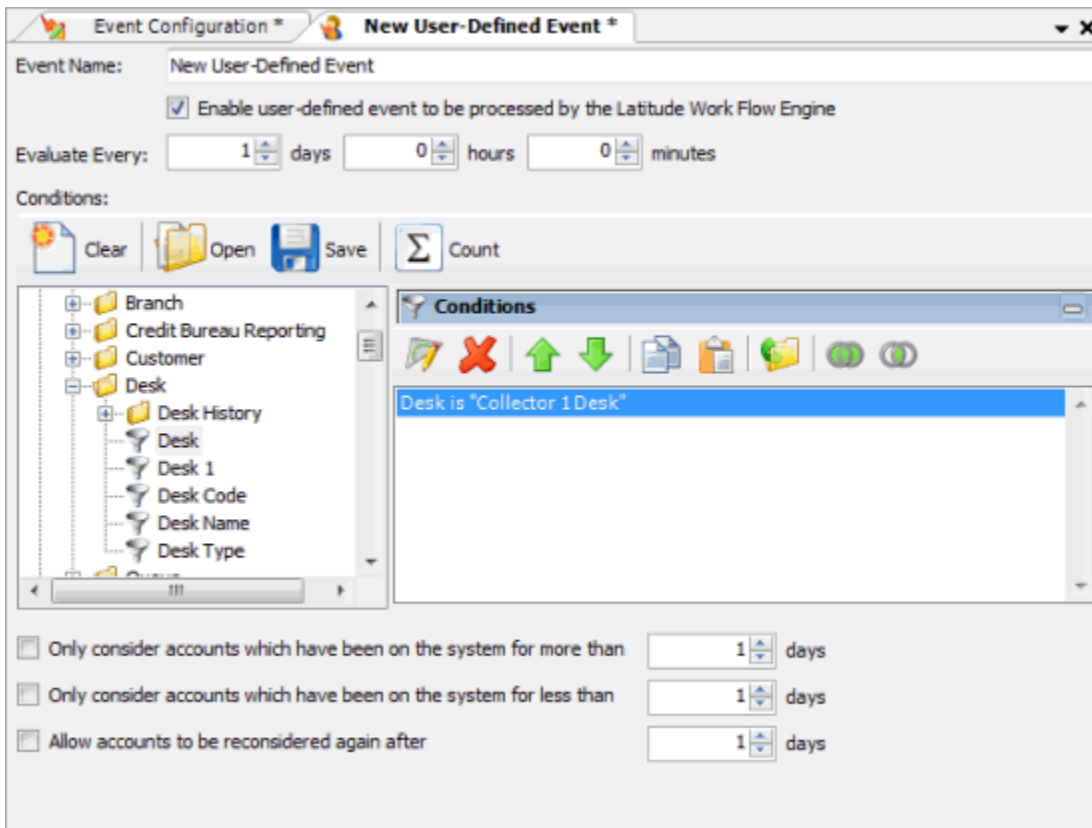
To create a user-defined event condition

1. Ensure that a new or existing user-defined event is open. For more information, see [Create a User-defined Event](#) or [Modify a User-defined Event](#).
2. In the **Data Selection** pane, click the plus sign (+) next to a folder to expand it.
3. Drag and drop a data item into the **Conditions** pane. A dialog box appears, which allows you to specify the criteria. The title of the dialog box and the information displayed depend on the condition selected.



In the following example, a user dragged and dropped the **Desk** data item into the **Conditions** pane, causing the **Desk** dialog box to appear.



- In the dialog box, specify the criteria and then click **Okay**. The condition appears in the **Conditions** pane. In the following example, the condition indicates that you want to include in the event accounts assigned to the "Collector 1 Desk."



5. Drag and drop more data items as necessary.
6. To modify the order of the conditions, do the following:
 - To move up a condition in the list, click the condition and then click the up arrow.
 - To move down a condition in the list, click the condition and then click the down arrow.
7. To group conditions for evaluation, do the following:
 - a. Select the conditions to group.

Tip: To select multiple sequential conditions, press and hold the **Shift** key and click the first and last sequential condition. To select multiple non-sequential conditions, press and hold the **Ctrl** key and click each individual condition. To select all conditions, right-click and then click **Select All**.
 - b. Right-click and then click **Group**. WorkFlow Designer groups the selected conditions and flags the beginning and ending of the group.
 - c. Continue grouping conditions as necessary.
8. To specify if a condition is optional or required, do one of the following:
 - To indicate that an account has to meet one condition only, click the second condition and then, in the toolbar, click the OR icon .
 - To indicate that an account has to meet both conditions, click the second condition and then, in the toolbar, click the AND icon .
9. In the Conditions pane, click **Save**. The **Save Query Dialog** box appears.
10. In the **Query Name** box, type a name for the query and then click **Save**.

Modify a User-defined Event Condition

Use the **Conditions** pane of an event tab to modify the criteria for which accounts to include in an event.

To modify a user-defined event condition

1. Ensure that a new or existing user-defined event is open. For more information, see [Create a User-defined Event](#) or [Modify a User-defined Event](#).

2. In the **Conditions** pane, do one of the following:

- Double-click a condition.
- Right-click a condition and then click **Edit**.

A dialog box appears, which allows you to modify the criteria. The title of the dialog box and the information displayed depends on the condition selected.

3. In the dialog box, modify the criteria and then click **Okay**. WorkFlow Designer updates the condition in the **Conditions** pane.
4. In the Conditions pane, click **Save**. The **Save Query Dialog** box appears.
5. Click **Save**.

Copy a User-defined Event Condition

Use the **Conditions** pane of an event tab to copy a user-defined event condition.

To copy a user-defined event condition

1. Ensure that a new or existing user-defined event is open. For more information, see [Create a User-defined Event](#) or [Modify a User-defined Event](#).
2. In the **Conditions** pane, right-click a condition and then click **Copy**. WorkFlow Designer copies the condition to the Clipboard.
3. In the **Conditions** pane, right-click where you want to copy the condition and then click **Paste**. WorkFlow Designer pastes the condition in the specified location.
4. In the Conditions pane, click **Save**. The **Save Query Dialog** box appears.
5. Click **Save**.

Group User-defined Event Conditions for Evaluation

Use the **Conditions** pane of an event tab to separate user-defined event conditions into groups when you require complex data mining.

To group user-defined event conditions for evaluation

1. Ensure that a new or existing user-defined event is open. For more information, see [Create a User-defined Event](#) or [Modify a User-defined Event](#).
2. In the **Conditions** pane, select the conditions to group.

Tip: To select multiple sequential conditions, press and hold the **Shift** key and click the first and last sequential condition. To select multiple non-sequential conditions, press and hold the **Ctrl** key and click each individual condition. To select all conditions, right-click and then click **Select All**.

3. Right-click and then click **Group**. WorkFlow Designer groups the selected conditions and flags the beginning and ending of the group.
4. Continue grouping conditions as necessary.
5. In the Conditions pane, click **Save**. The **Save Query Dialog** box appears.
6. Click **Save**.

Modify the Order of User-defined Event Conditions

Use the **Conditions** pane of an event tab to modify the order in which to evaluate user-defined event conditions.

To modify the order of user-defined event conditions



1. Ensure that a new or existing user-defined event is open. For more information, see [Create a User-defined Event](#) or [Modify a User-defined Event](#).
2. In the **Conditions** pane, do one of the following:
 - To move up a condition in the list, click the condition and then click the up arrow.

- To move down a condition in the list, click the condition and then click the down arrow.
3. In the Conditions pane, click **Save**. The **Save Query Dialog** box appears.
 4. Click **Save**.

Set a User-defined Event Condition to Optional or Required

Use the **Conditions** pane of an event tab to copy a user-defined event condition.

To set a user-defined event condition to optional or required

1. Ensure that a new or existing user-defined event is open. For more information, see [Create a User-defined Event](#) or [Modify a User-defined Event](#).
2. In the **Conditions** pane, do one of the following:
 - To indicate that an account has to meet one condition only, click the second condition and then, in the toolbar, click the OR icon .
 - To indicate that an account has to meet both conditions, click the second condition and then, in the toolbar, click the AND icon .
3. In the Conditions pane, click **Save**. The **Save Query Dialog** box appears.
4. Click **Save**.

Delete a User-defined Event Condition

Use the **Conditions** pane of an event tab to delete a user-defined event condition.

To delete a user-defined event condition

1. Ensure that a new or existing user-defined event is open. For more information, see [Create a User-defined Event](#) or [Modify a User-defined Event](#).
2. In the **Conditions** pane, right-click the condition and then click **Delete**. A confirmation dialog box appears.
3. Click **Yes**.
4. In the Conditions pane, click **Save**. The **Save Query Dialog** box appears.
5. Click **Save**.

Query Condition Types

You use query conditions when creating and running queries. For each condition you select for your query, you specify the criteria to use to evaluate accounts. The criteria available is based on the condition type.

Each condition is one of the following types:

- [Dates](#)
- [Single option](#)
- [Multiple option](#)

Dates

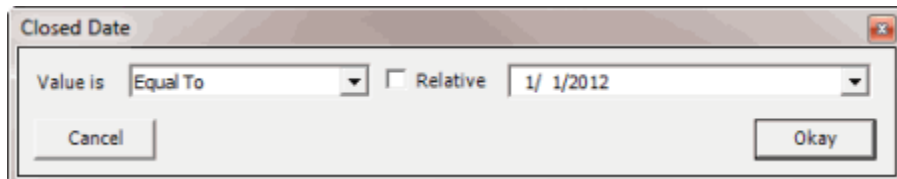
Date conditions allow you to query accounts based on a [specific date](#), [date range](#), [any date or blank date](#), or [relative date](#). When you select a date condition, a dialog box displays to allow you to specify the date criteria. The criteria available depends on the value you select in the **Value is** list box, and whether you select the **Relative** check box.

Specific date

Use one of the following comparisons to evaluate accounts based on a specific date:

Value is	Description
Equal To	Retrieves accounts where the date matches a specific date.
Not Equal To	Retrieves accounts where the date does not match a specific date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after a specific date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before a specific date.
Later Than	Retrieves accounts where the date comes after a specific date.
Earlier Than	Retrieves accounts where the date comes before a specific date.

In the following example, the system retrieves accounts where the **Closed Date** is 01/01/2012.

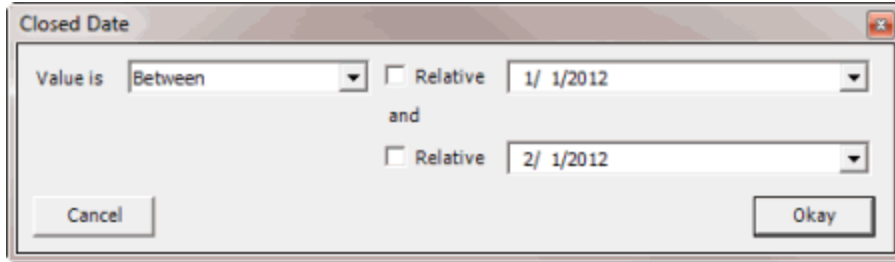


Date range

Use one of the following comparisons to evaluate accounts based on a date range:

Value is	Description
Between	Retrieves accounts where the date falls between two specific dates.
Not Between	Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates.

In the following example, the system retrieves accounts where the **Closed Date** falls on or between 01/01/2012 and 02/01/2012.

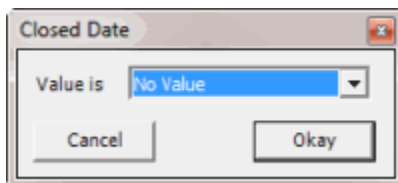


Any date or blank date

Use one of the following comparisons to evaluate accounts based on whether a date is blank or contains any value:

Value is	Description
No Value	Retrieves accounts where the date is blank.
Any Value	Retrieves accounts where the date is any date or blank.

In the following example, the system retrieves accounts where the **Closed Date** is blank (doesn't contain a value).



Relative date

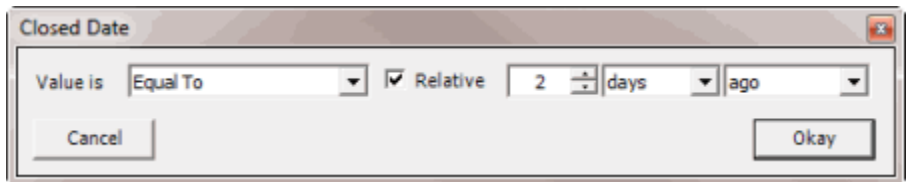
Use the relative date option to evaluate accounts based on the relation of a date to the current date. You specify a comparison and the criteria to use to calculate the relative date. The criteria are the number of days, months or years from the current date, and whether to add or subtract that number from the current date.

Use one of the following comparisons to evaluate accounts based on the calculated relative date:

Value is	Description
Equal To	Retrieves accounts where the date matches the relative date.
Not Equal To	Retrieves accounts where the date does not match the relative date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after the relative date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before the relative date.
Later Than	Retrieves accounts where the date comes after the relative date.

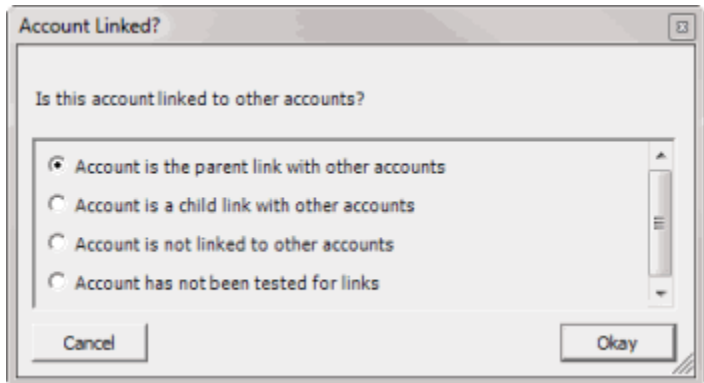
Value is	Description
Earlier Than	Retrieves accounts where the date comes before the relative date.

In the following example, the system retrieves accounts where the **Closed Date** is two days before the current date.



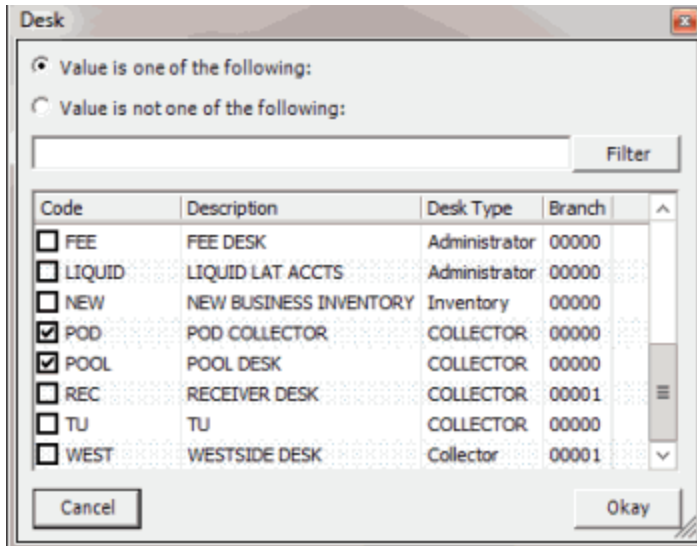
Single option

Single option conditions allow you to retrieve accounts that match a single option in a group of options. In the following example, the system retrieves accounts that are the parent link to other accounts.



Multiple option

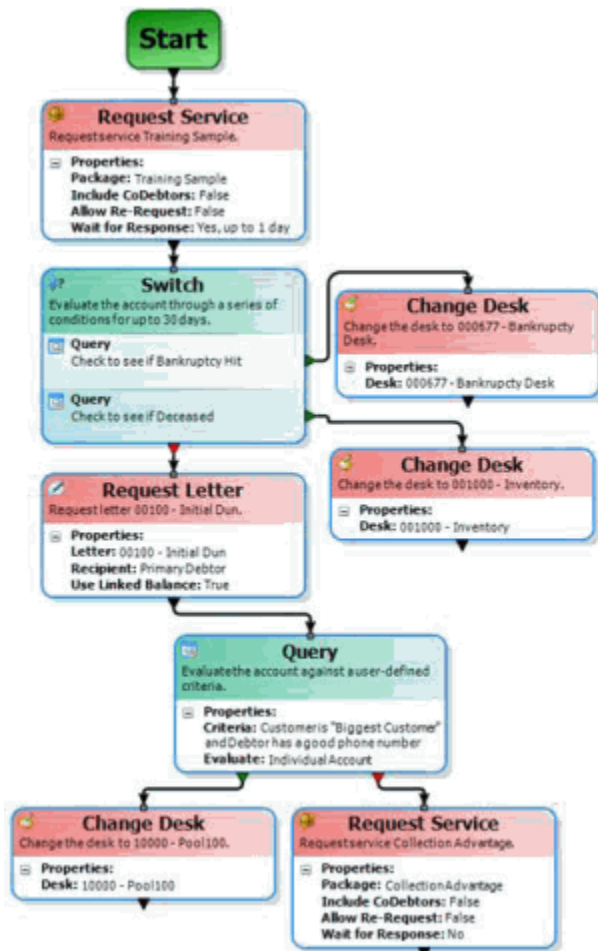
Multiple option conditions allow you to retrieve accounts that match one or more options in a group of options. In the following example, the system retrieves accounts assigned to the POD desk and accounts assigned to the POOL desk.



Workflow Design

Workflow Design


A workflow is a business process applied to accounts. It contains activities that define processing or evaluation. When accounts process through a workflow, the WorkFlow Engine routes them to the next available activity based on conditions. The following is an example of a workflow.



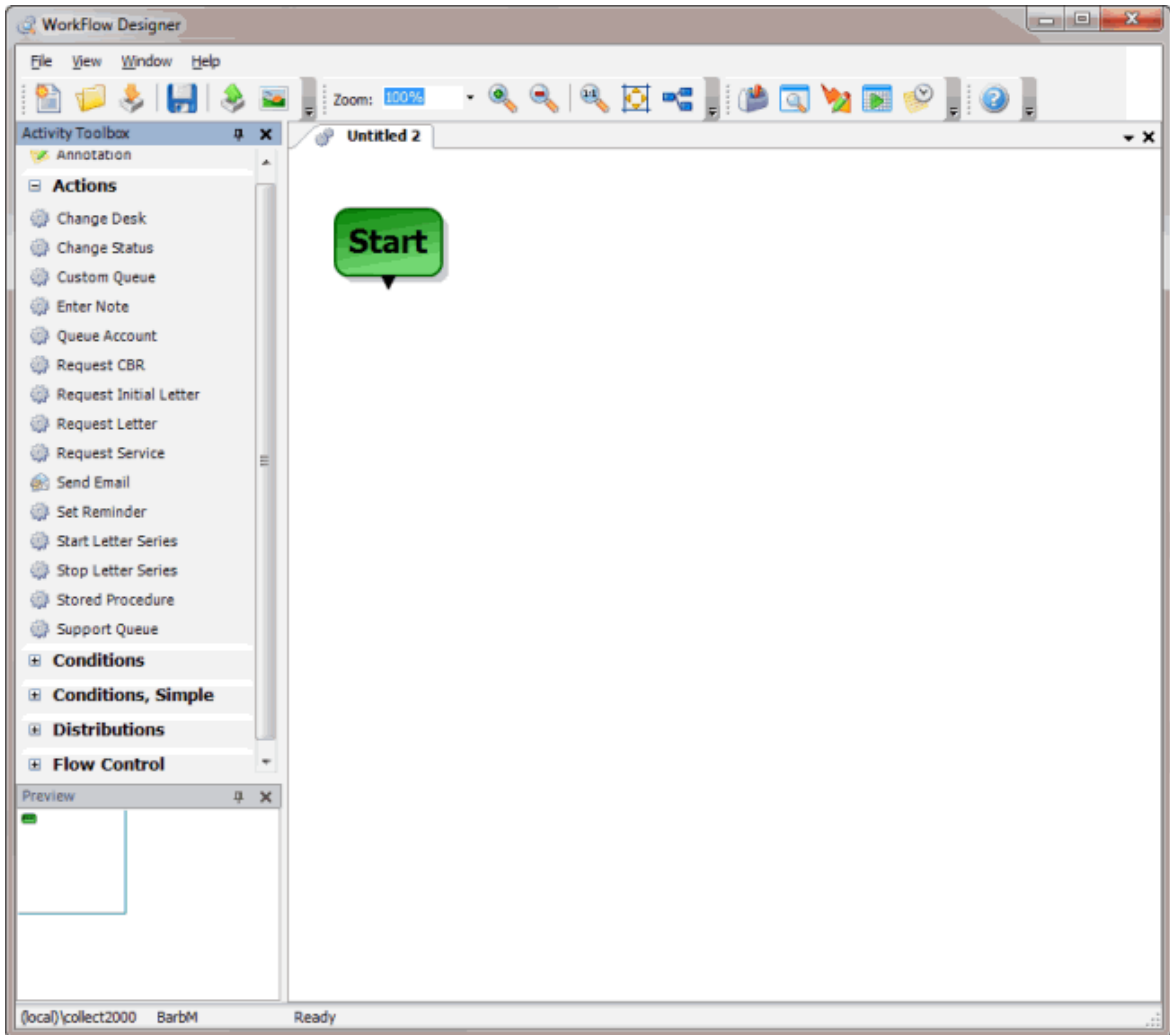
Create a Workflow

Use the **Untitled [#]** tab to create a workflow. You drag and drop activities to a workflow and then connect the activities to define the processing order. You can add and delete activities and connect and disconnect activities as necessary.

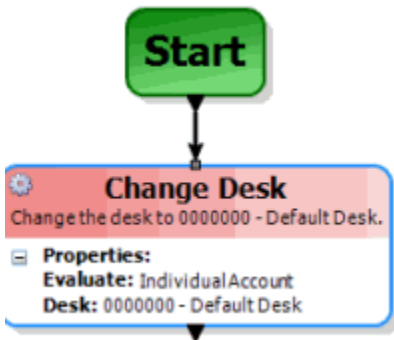
To create a workflow

1. Do one of the following:
 - From the **File** menu, click **Create New Work Flow**.
 - From the **WorkFlow** toolbar, click the Create icon .

The **Untitled [#]** tab appears with a **Start** activity included.



2. Drag an activity from the **Activity Toolbox** to the workflow tab.
3. To connect the activity to the **Start** activity, click and drag the arrow from the **Start** activity to the endpoint of the activity you added.



4. Continue adding activities as necessary and connecting them in the order you want them to process.

Note: If you add a condition or distribution activity and don't specify an action to process for one of the endpoints, the unconnected endpoint results in the end of the workflow.


Tips:

- To delete an activity from the workflow, on the workflow tab, click the activity and then press the **Delete** key.
 - To delete a connection, click the connecting line and then press the **Delete** key.
5. Do the steps to [Modify Criteria for an Activity](#).
 6. In the **WorkFlow** toolbar, click **Save**. The **Save WorkFlow** dialog box appears.
 7. In the **Work Flow** box, type a name for the workflow and then click **Save**.

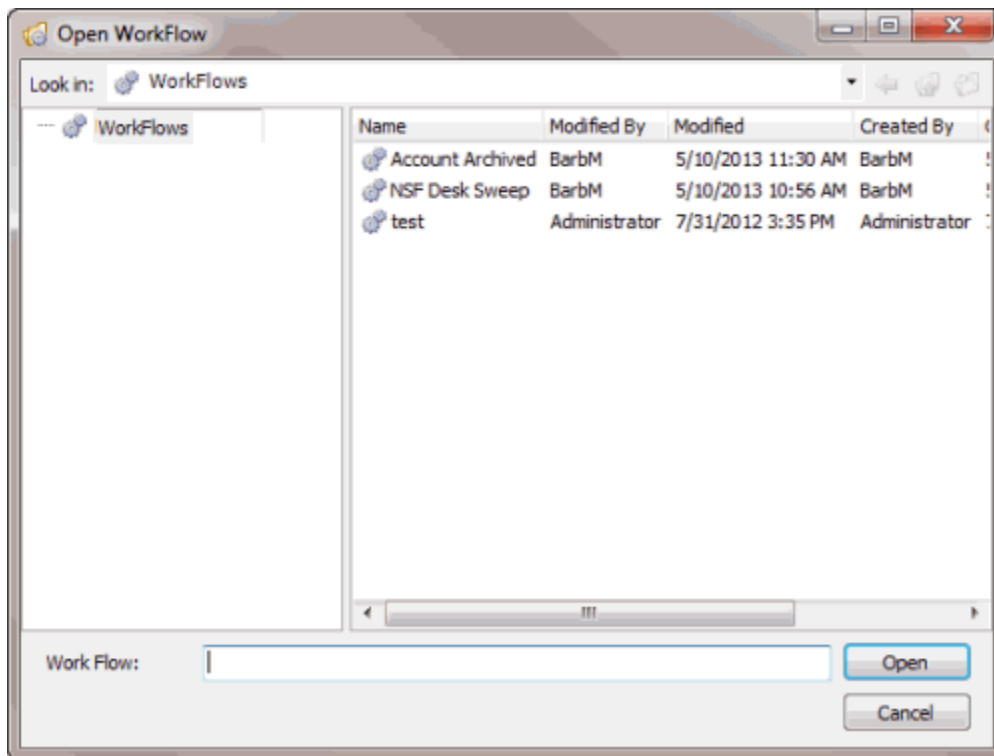
Modify a Workflow

Use the **[Workflow Name]** tab to modify a workflow.

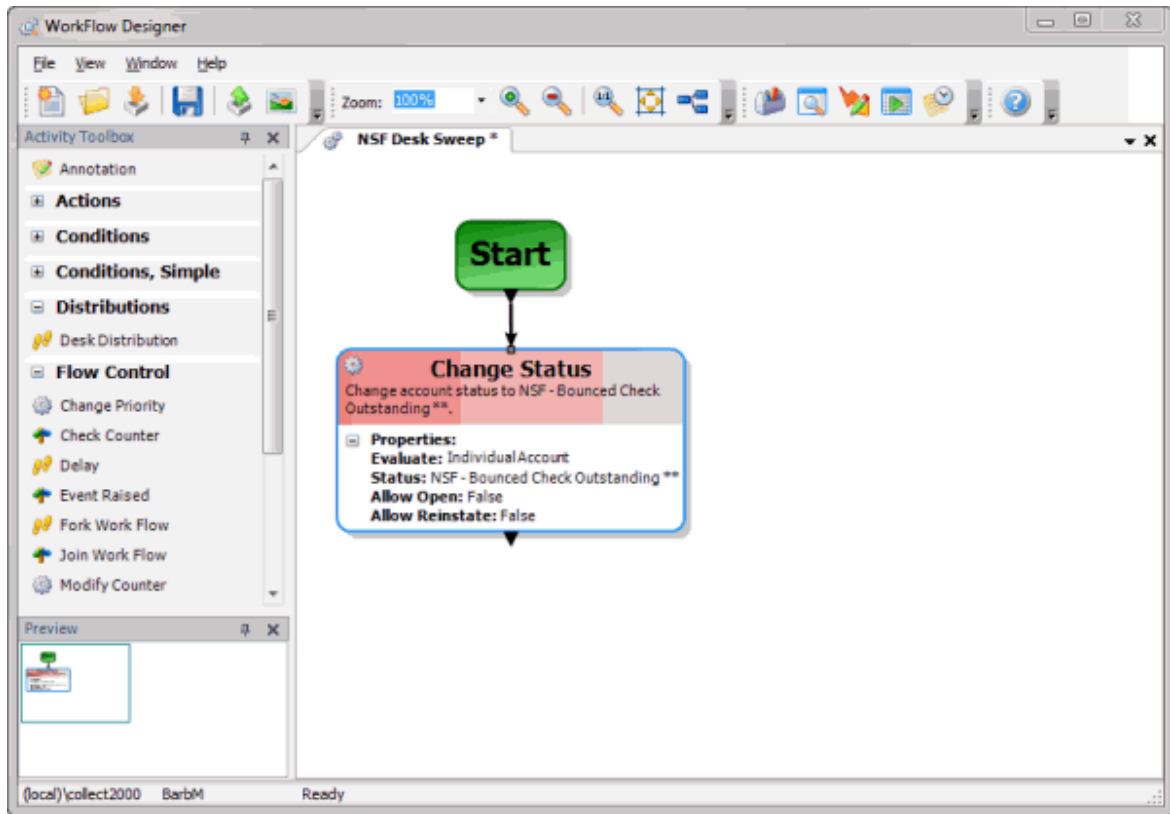
To modify a workflow

1. Do one of the following:
 - From the **File** menu, click **Open Existing Work Flow**.
 - From the **WorkFlow** toolbar, click the Open icon .

The **Open WorkFlow** dialog box appears.



2. Click the workflow and then click **Open**. The **[Workflow Name]** tab appears.



3. To add an activity to the workflow, do the following:
 - a. Drag an activity from the **Activity Toolbox** to the workflow tab.
 - b. Click and drag the arrow from an existing activity to the endpoint of the activity you added.

Note: If you add a condition or distribution activity and don't specify an action to process for one of the endpoints, the unconnected endpoint results in the end of the workflow.


4. To delete an activity from the workflow, do the steps to [Delete an Activity From a Workflow](#).
5. To modify the criteria for an activity, do the steps to [Modify Criteria for an Activity](#).
6. In the **WorkFlow** toolbar, click **Save**.
7. To save the workflow, do one of the following:
 - To save the workflow under the same name, in the **WorkFlow** toolbar, click **Save**.
 - To save the workflow under a new name (leaving the existing workflow unchanged), from the **File** menu, click **Save Current Work Flow as...** In the **Save WorkFlow** dialog box, in the **Work Flow** box, type a new name and then click **Save**.

Import a Workflow

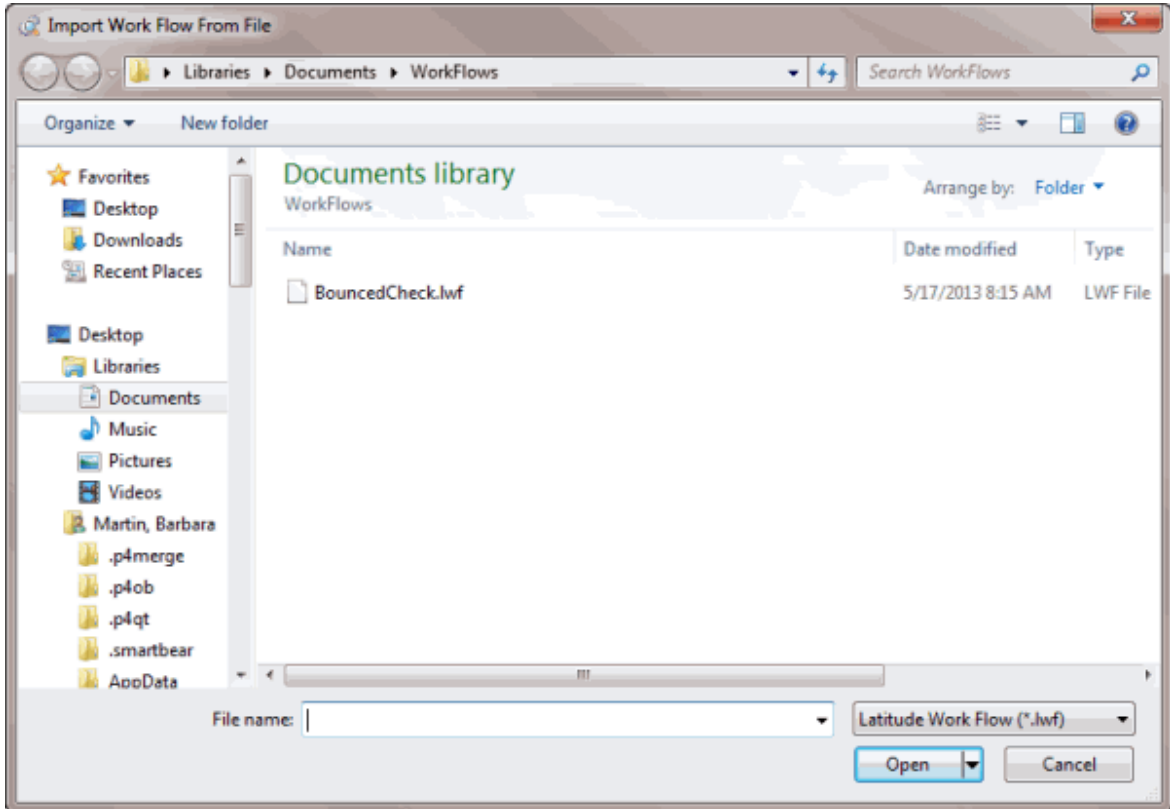
Use the **Import Work Flow From File** dialog box to import a workflow.

To import a workflow

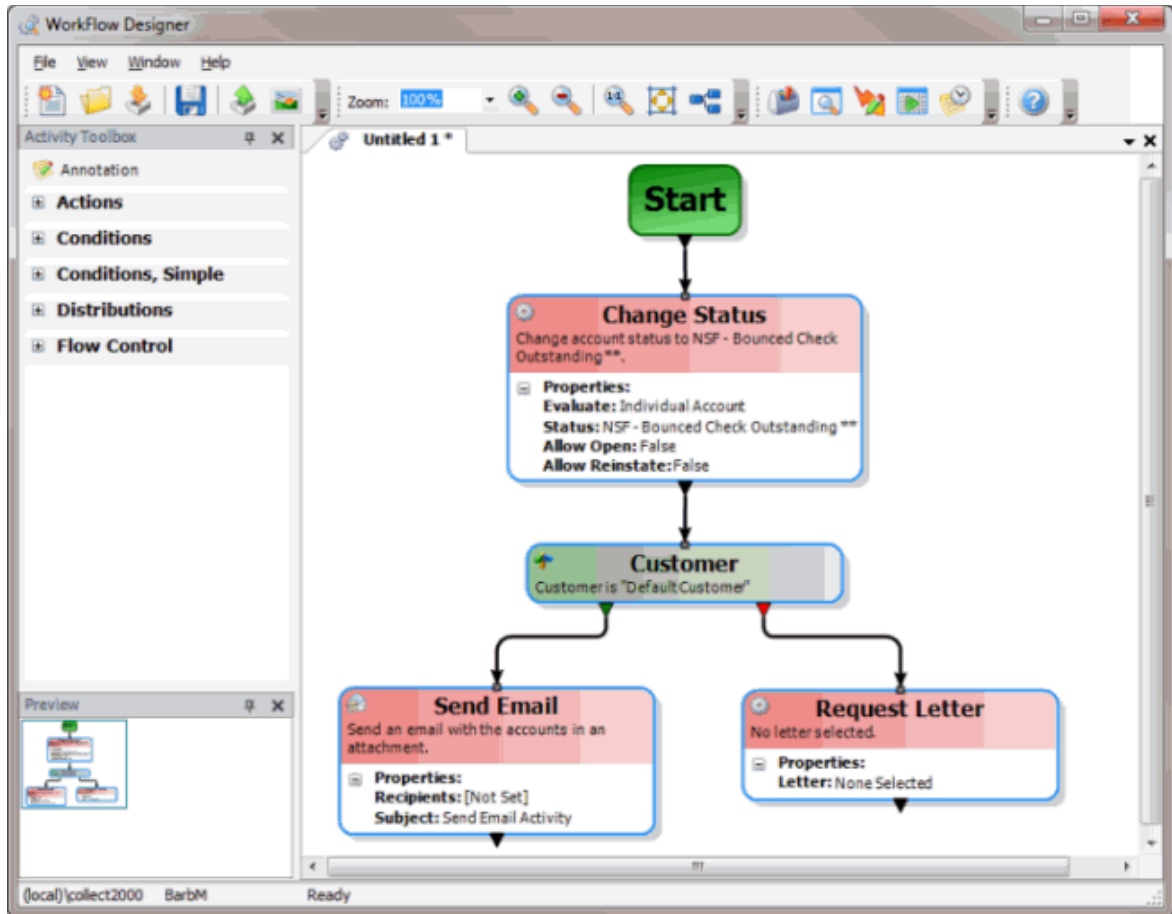
1. Do one of the following:

- From the **File** menu, click **Import Work Flow**.
- From the **Workflow** toolbar, click the Import icon .

The **Import Work Flow From File** dialog box appears.



2. Click the workflow to import and then click **Open**. The workflow appears on a new tab.




3. In the **WorkFlow** toolbar, click **Save**. The **Save WorkFlow** dialog box appears.
4. In the **Work Flow** box, type a name for the workflow and then click **Save**. WorkFlow Designer renames the "Untitled" tab to the specified file name.

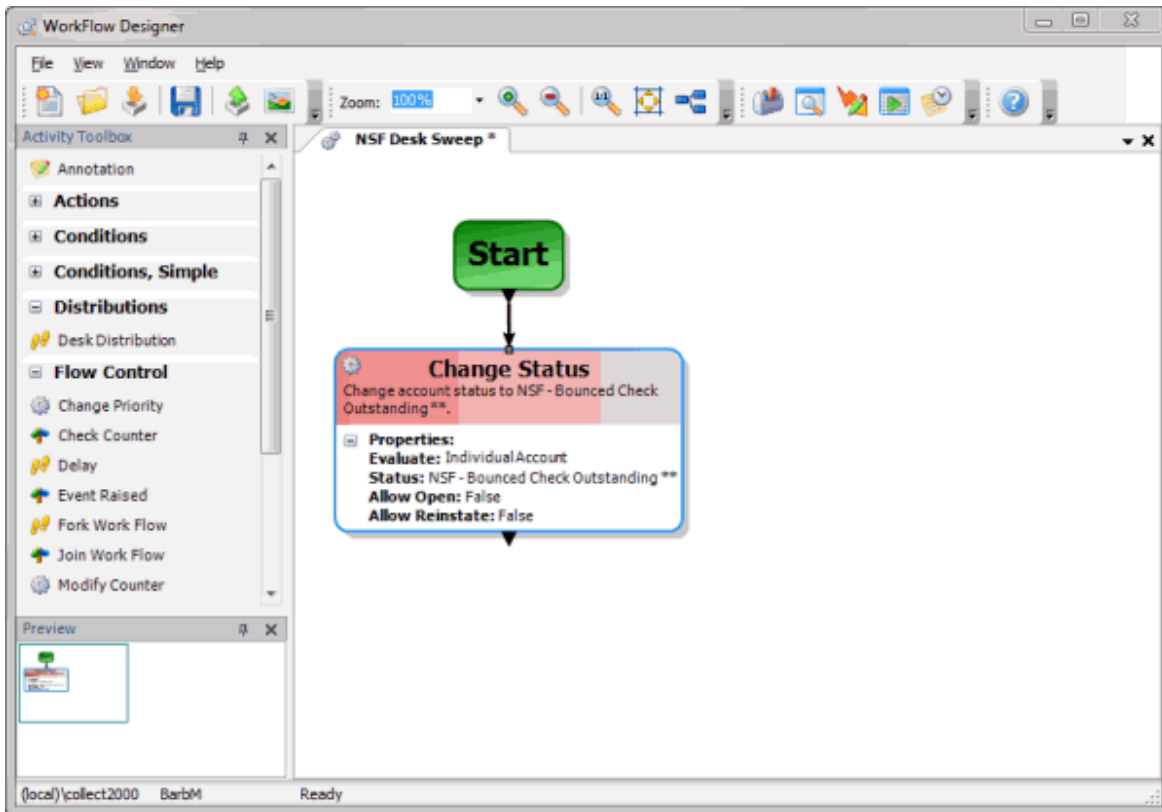
Modify Criteria for an Activity

Use the **Edit [Activity Name] Activity** dialog box to modify criteria for an activity.

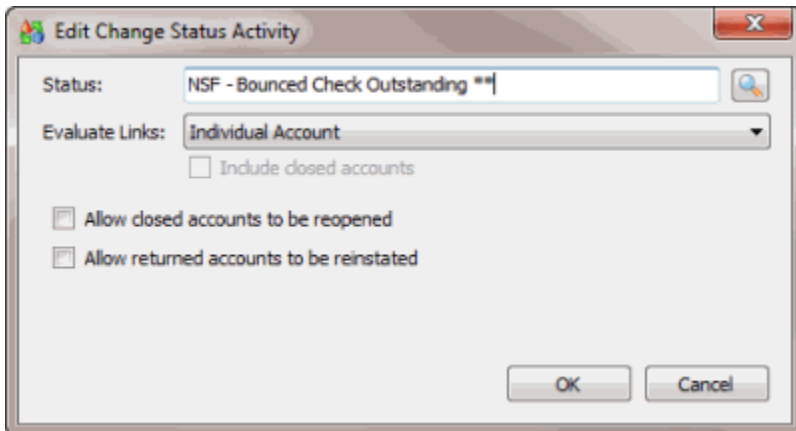
To modify criteria for an activity

1. Do one of the following:
 - From the **File** menu, click **Open Existing Work Flow**.
 - From the **WorkFlow** toolbar, click the Open icon .

The **[Workflow Name]** tab appears.



2. On the workflow tab, double-click an activity. The **Edit [Activity Name] Activity** dialog box appears. The criteria available in the dialog box depends on the selected activity. For more information about criteria for a specific activity, see [Workflow Activity Configuration](#).




3. Complete the information and then click **OK**.
4. In the **WorkFlow** toolbar, click **Save**.

Add a Note to a Workflow

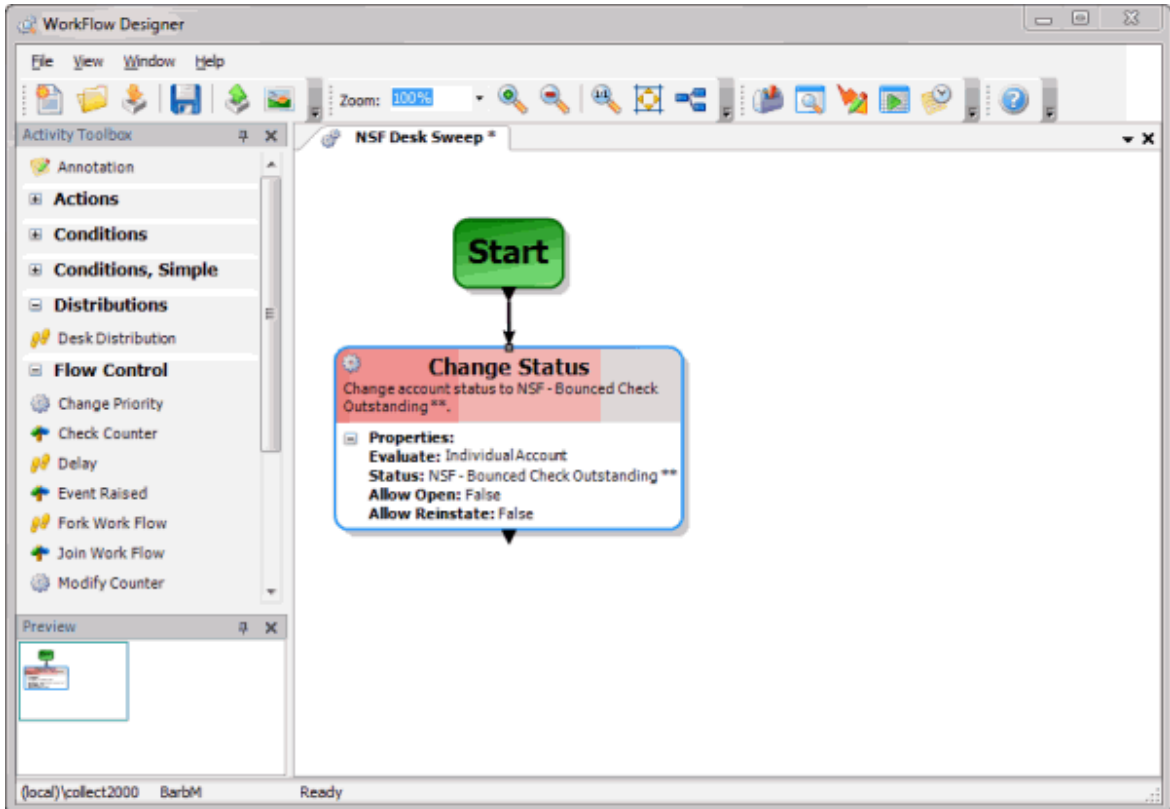
Use the **[Workflow Name]** tab to add a note to a workflow to describe a process.

To add a note to a workflow

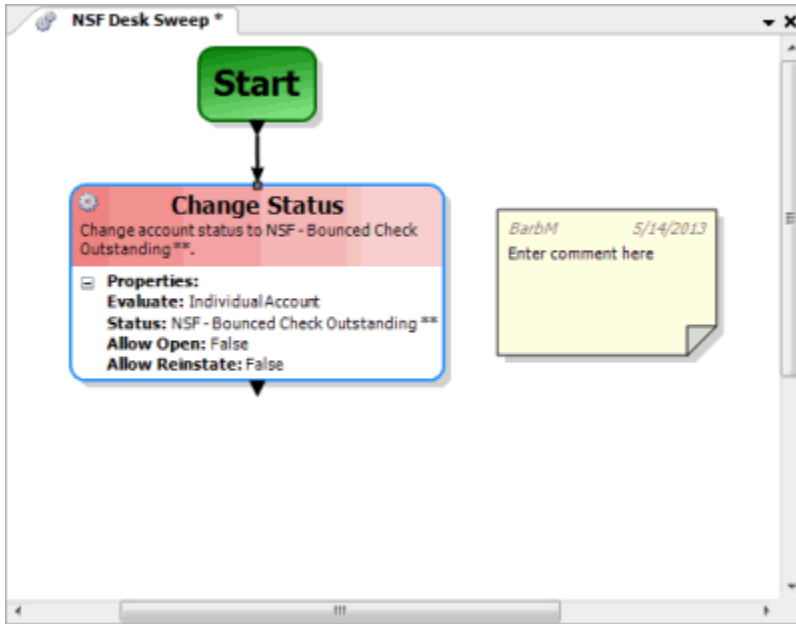
WorkFlow Designer Printable Help

1. Do one of the following:
 - From the **File** menu, click **Open Existing Work Flow**.
 - From the **WorkFlow** toolbar, click the Open icon .

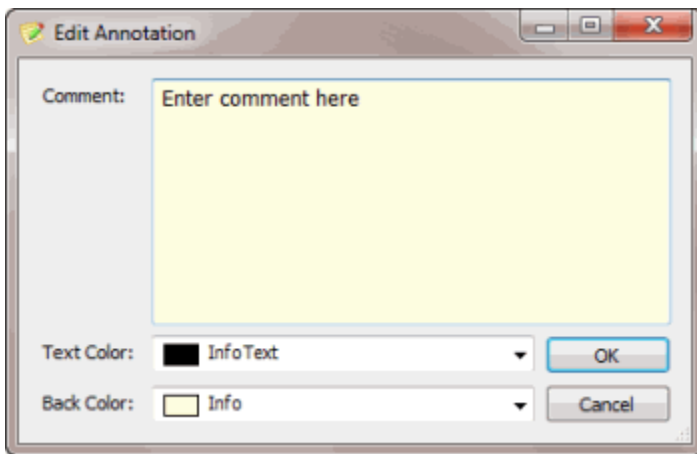
The [**Workflow Name**] tab appears.



2. Drag **Annotation** from the **Activity Toolbox** to the workflow tab. The note includes your user name and the current date.



3. On the workflow tab, double-click the note. The **Edit Annotation** dialog box appears.

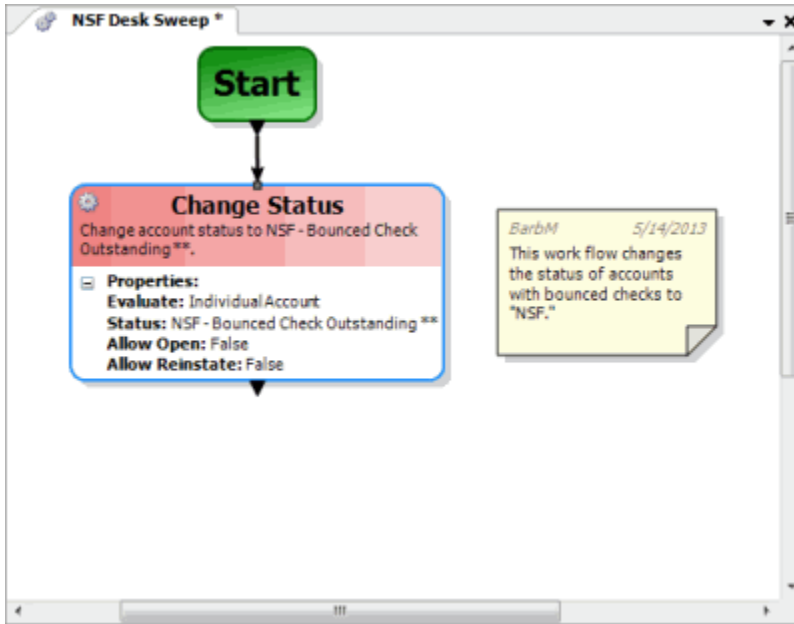


Comment: Information regarding the workflow, such as the purpose. This information is only visible in WorkFlow Designer.

Text Color: Color of the note's text.

Back Color: Background color of the note.

4. Complete the information and then click **OK**. WorkFlow Designer updates the note on the workflow tab.




5. Continue adding notes as necessary. You can use different colors for the text and backgrounds to distinguish notes.
6. In the **WorkFlow** toolbar, click **Save**.

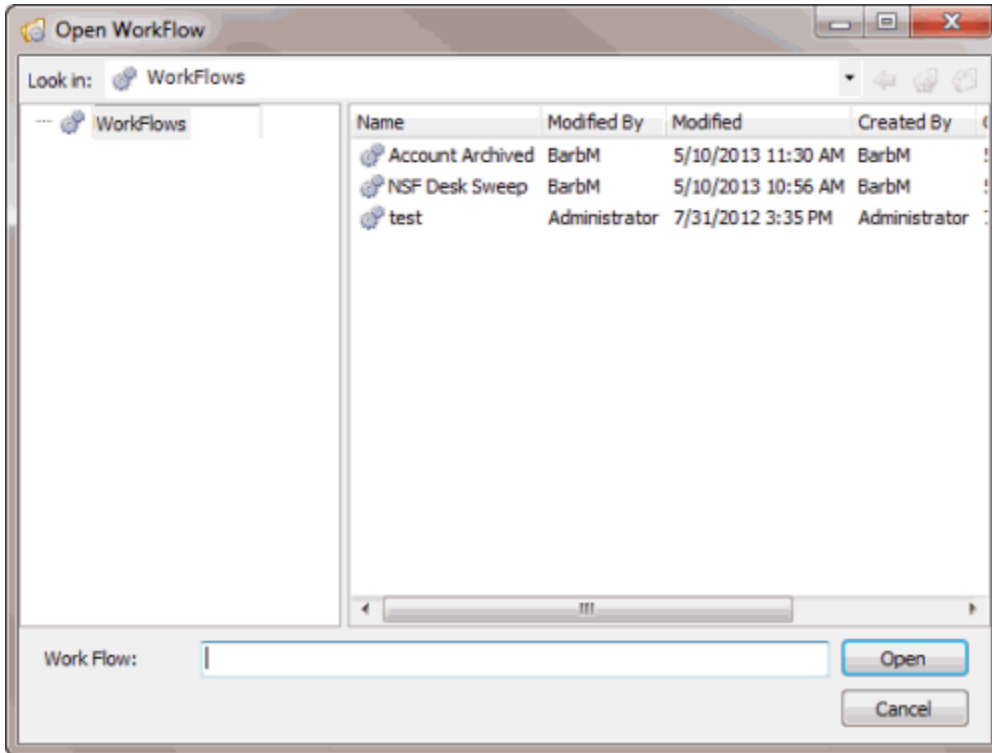
Rename a Workflow

Use the **[Workflow Name]** tab to rename a workflow.

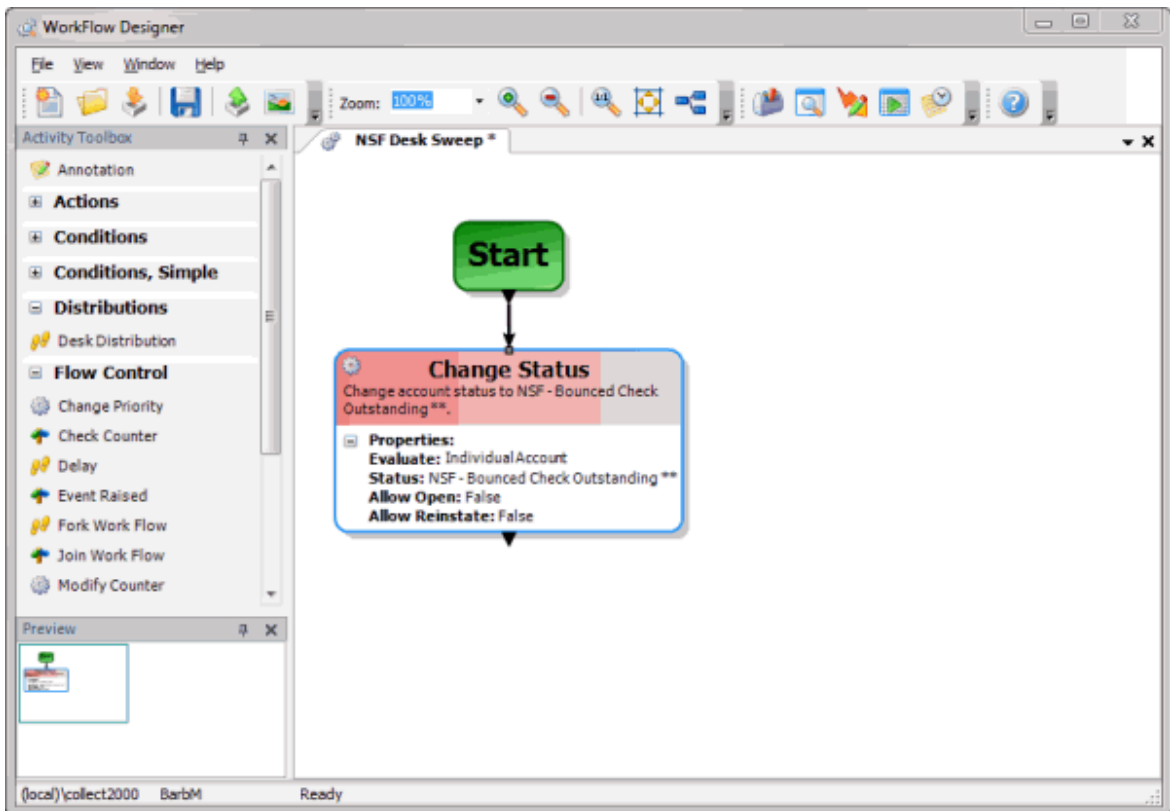
To rename a workflow

1. Do one of the following:
 - From the **File** menu, click **Open Existing Work Flow**.
 - From the **WorkFlow** toolbar, click the Open icon .

The **Open WorkFlow** dialog box appears.



2. Click the workflow and then click **Open**. The [Workflow Name] tab appears.




3. From the **File** menu, click **Rename Current Work Flow**. The **Save WorkFlow** dialog box appears.

4. In the **Work Flow** box, type a new name and then click **Save**.

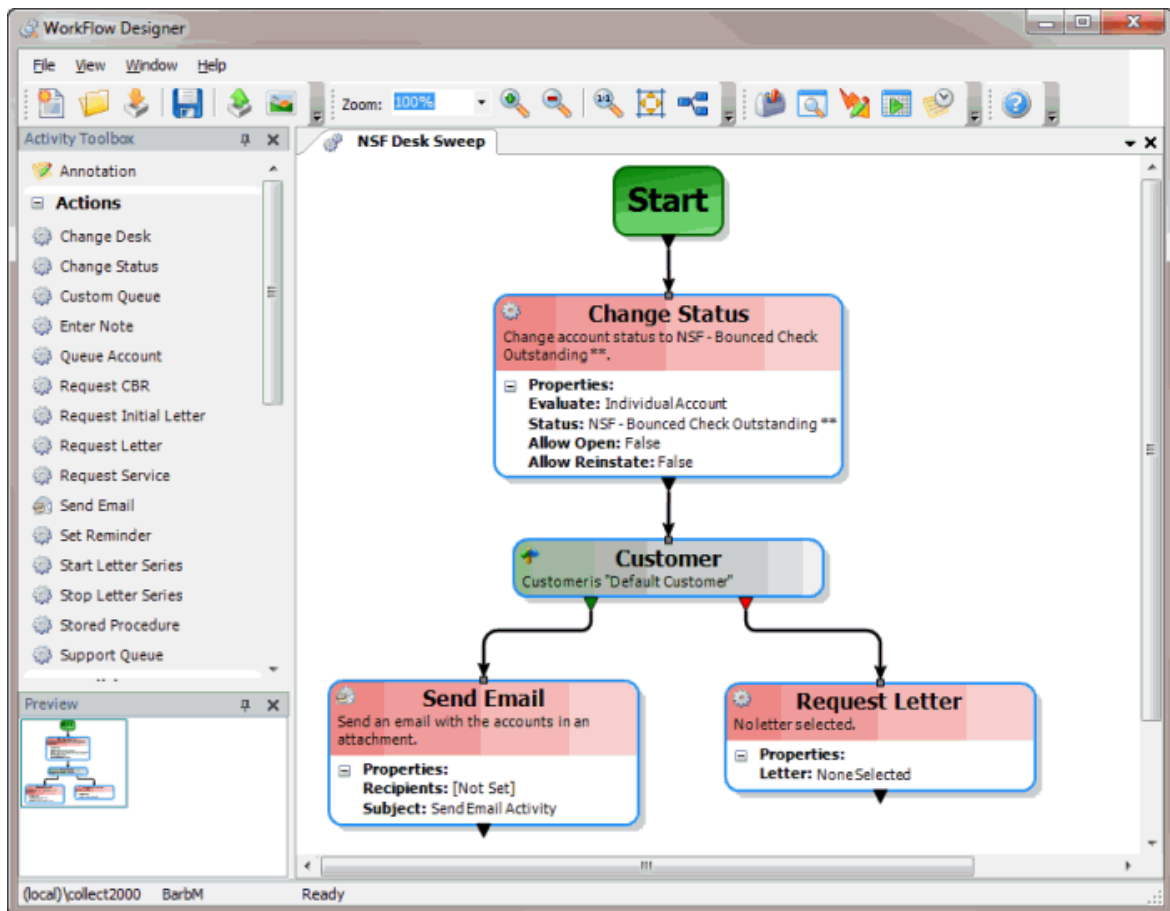
Delete an Activity From a Workflow

Use the **[Workflow Name]** tab to delete an activity from a workflow.

To delete an activity from a workflow

1. Do one of the following:
 - From the **File** menu, click **Open Existing Work Flow**.
 - From the **WorkFlow** toolbar, click the Open icon .

The **[Workflow Name]** tab appears.



2. On the workflow tab, click the activity and then press the **Delete** key. If you are deleting an activity that you already saved to the workflow, the **Delete [Activity Name] Activity** dialog box appears.




3. Do one of the following:
 - To specify the action to process on accounts that are pending processing for this activity, click the action. The actions available depend on the activity you are deleting, and may include:
 - Stop accounts pending for this activity:** Stops processing of accounts that are pending for this activity and deletes the activity from the workflow.
 - Move accounts to...:** Moves accounts to a connected activity for processing and deletes the activity from the workflow. This action is available for activities with more than one endpoint (for example, conditions).
 - To cancel deletion of the activity, click **Cancel and do not delete this activity**.
4. In the **WorkFlow** toolbar, click **Save**.

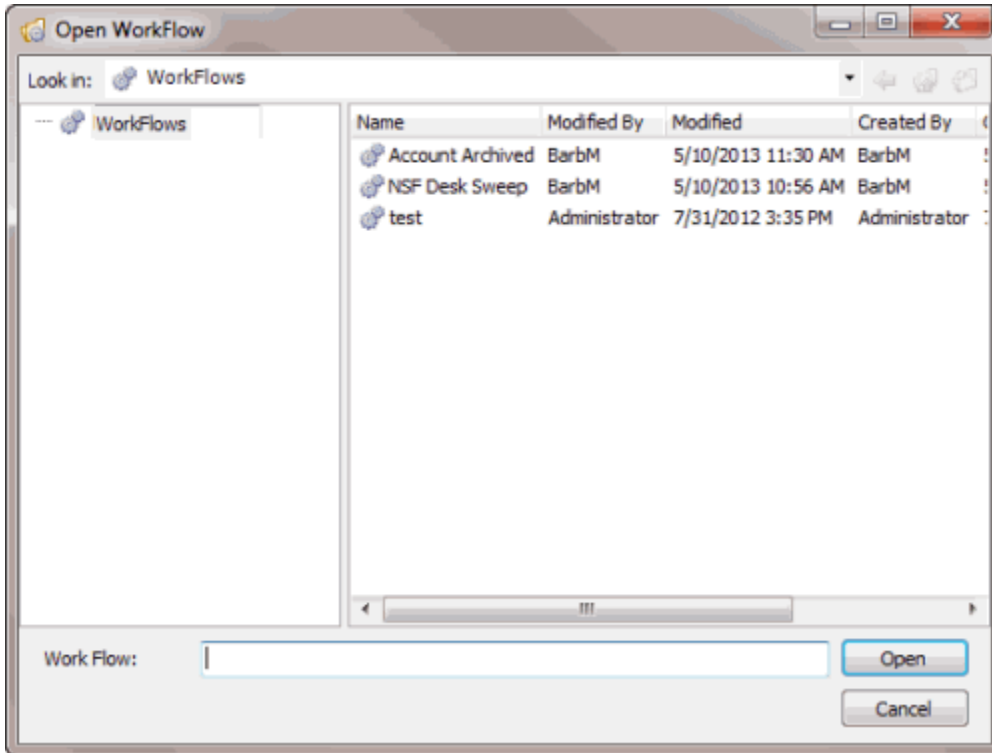
Export a Workflow to a File

Use the **[Workflow Name]** tab to export a workflow a file.

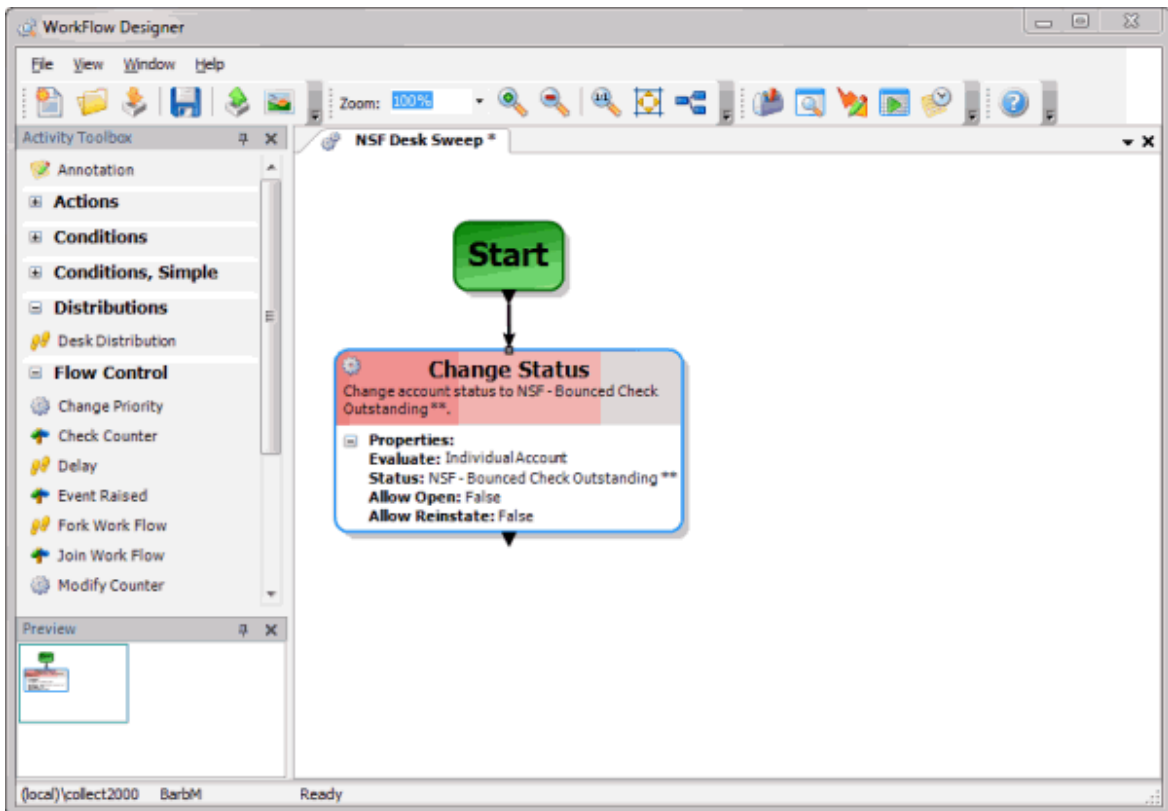
To export a workflow to a file

1. Do one of the following:
 - From the **File** menu, click **Open Existing Work Flow**.
 - From the **WorkFlow** toolbar, click the Open icon .


The **Open WorkFlow** dialog box appears.



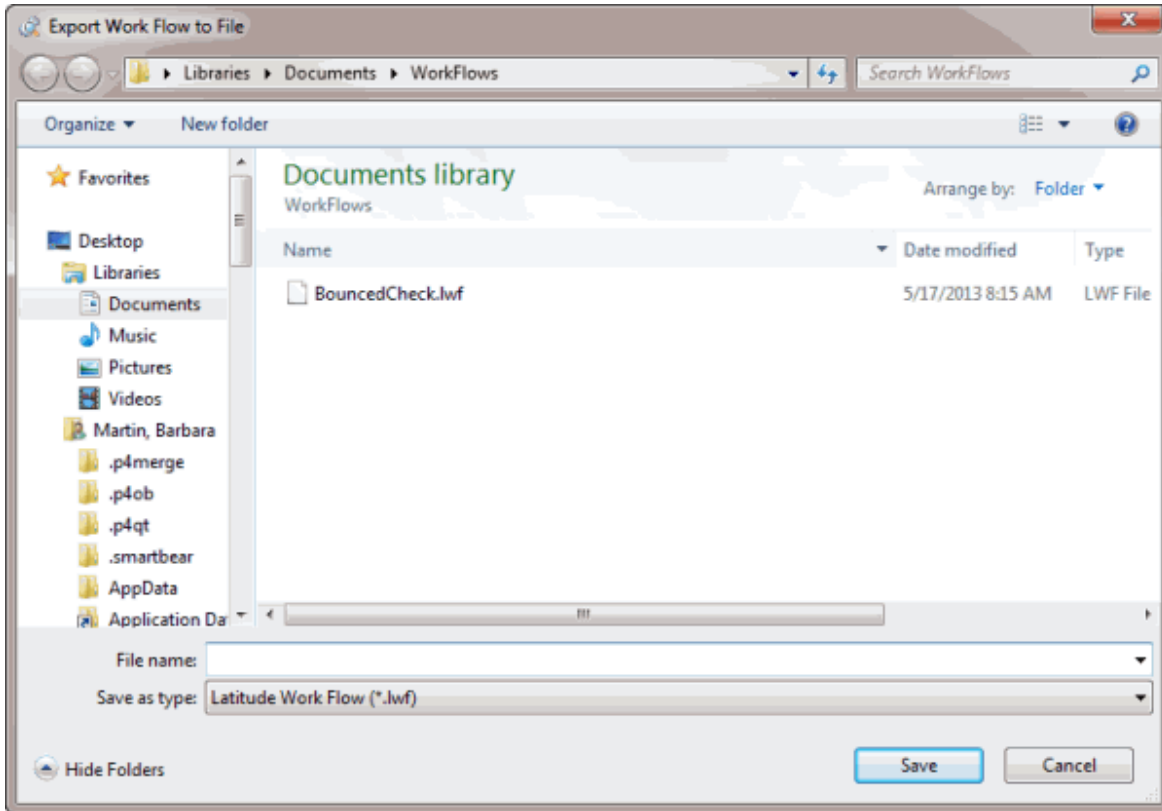
2. Click the workflow and then click **Open**. The [Workflow Name] tab appears.



3. Do one of the following:

- From the **File** menu, click **Export Work Flow to File**.
- From the **Workflow** toolbar, click the Export to File icon .

The **Export Work Flow to File** dialog box appears.




4. In the **File Name** box, type a name for the export file and then click **Save**.

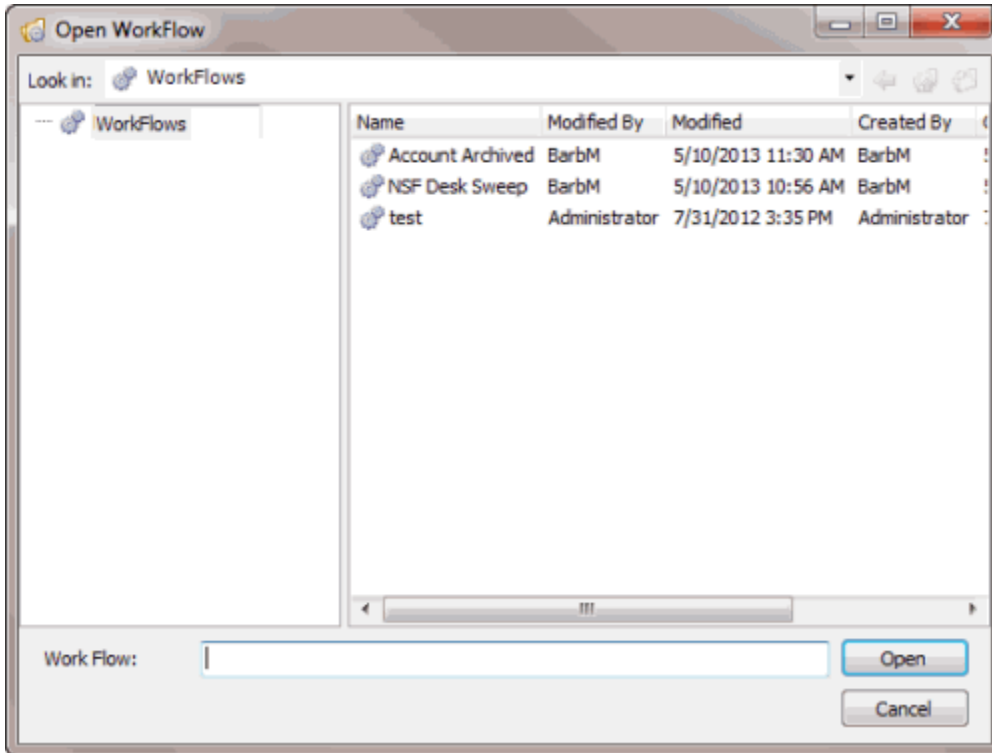
Export a Workflow to an Image

Use the **[Workflow Name]** tab to export a workflow an image.

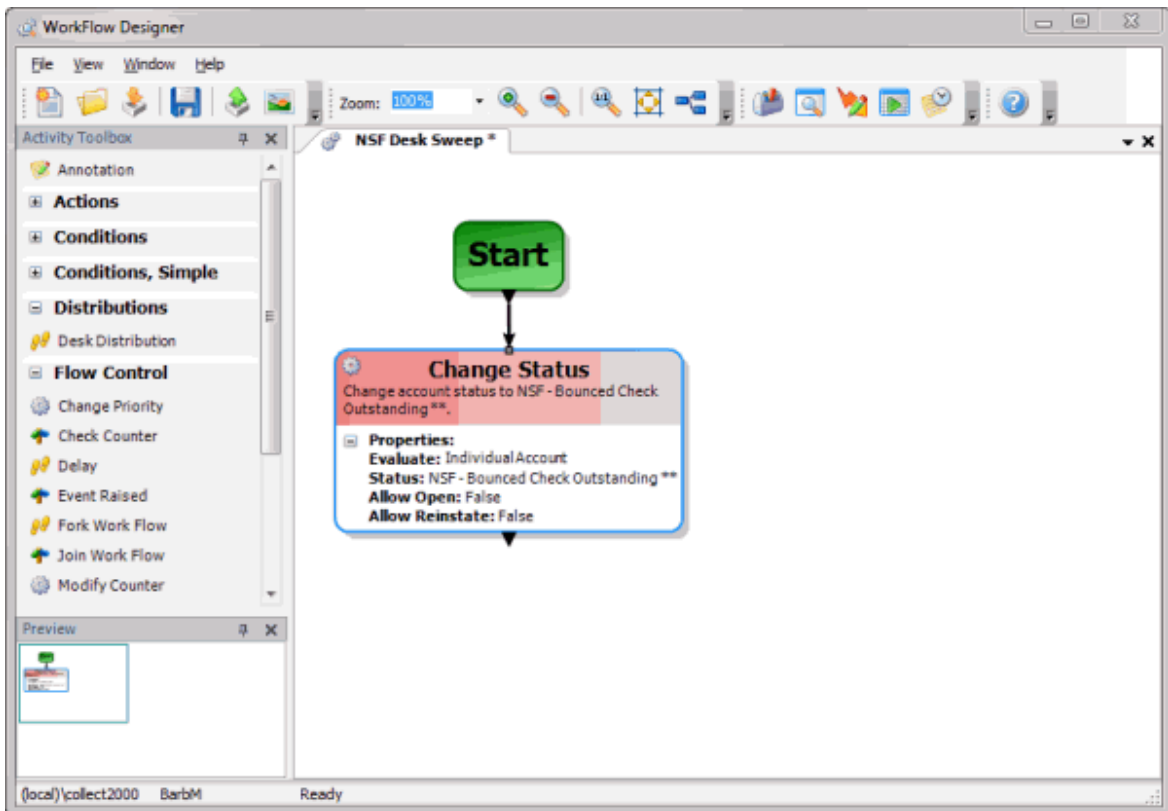
To export a workflow to an image

1. Do one of the following:
 - From the **File** menu, click **Open Existing Work Flow**.
 - From the **Workflow** toolbar, click the Open icon .


The **Open Workflow** dialog box appears.



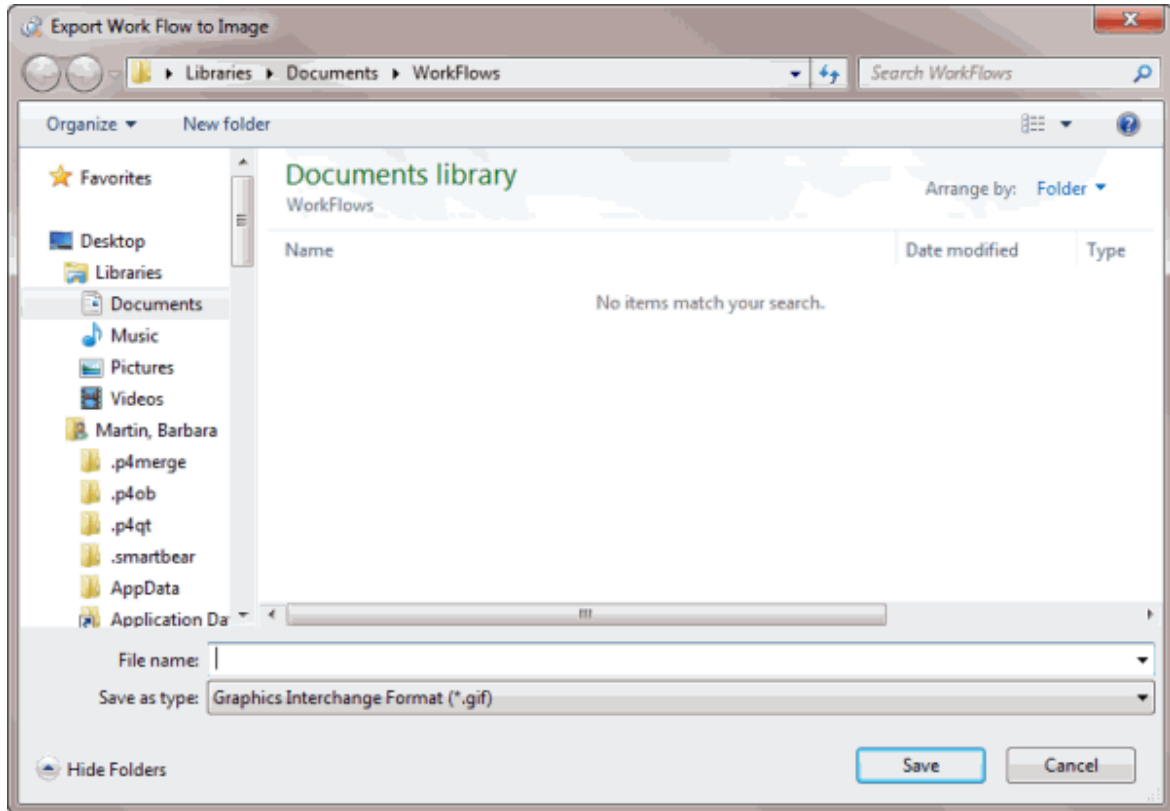
2. Click the workflow and then click **Open**. The [Workflow Name] tab appears.



3. Do one of the following:

- From the **File** menu, click **Export Work Flow to Image**.
- From the **Workflow** toolbar, click the Export to Image icon .

The **Export Work Flow to Image** dialog box appears.



4. In the **File Name** box, type a name for the export image file.
5. In the **Save as type** list box, click the image type and then click **Save**.

Workflow Activity Configuration

Workflow Activity Configuration

Activities determine how accounts process in a workflow. Activity types include action, condition, simple condition, distribution, flow control, and process orchestration. You configure the activities as needed.

Action Activities

Action Activities

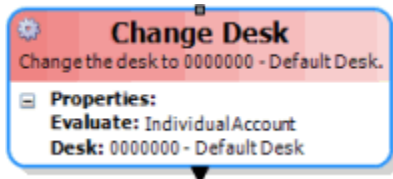
Action activities process an activity on an account and move the account to the next activity in the workflow. Accounts that process through an action activity remain in a "runnable" state and the Workflow Engine processes them again. Sometimes, the Workflow Engine delays continued processing of these accounts until after this activity finishes processing other accounts. The exception is the Send Email activity, which waits until the specified number of accounts process, or until the accounts have been waiting the specified duration.

Change Desk

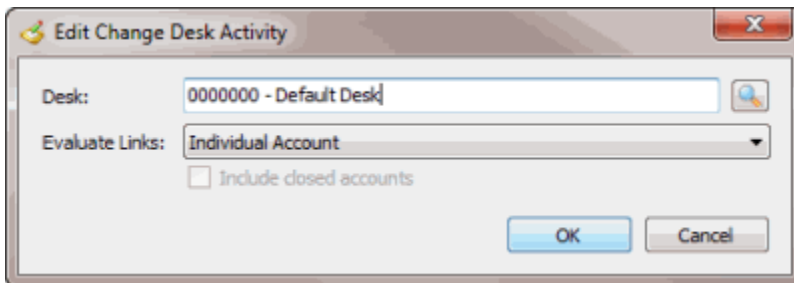
Use the **Edit Change Desk Activity** dialog box to specify the criteria for changing the desk assigned to accounts.

To modify a Change Desk activity

1. Create or open a workflow with a Change Desk activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Change Desk activity. The **Edit Change Desk Activity** dialog box appears.



Desk: Desk to assign to the account.

Evaluate Links: Indicates whether to change the desk for all linked accounts or just specific accounts.

Individual Account: Changes the desk for the account that is moving through the workflow only.

Link Driver: Changes the desk for the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Changes the desk for all linked accounts within the specified custom customer group.

Customer: Changes the desk for all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Changes the desk for all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Changes the desk for all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Changes the desk for all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Changes the desk for all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Changes the desk for all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Changes the desk for all linked accounts.

Include closed accounts: If selected, changes the desk for accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

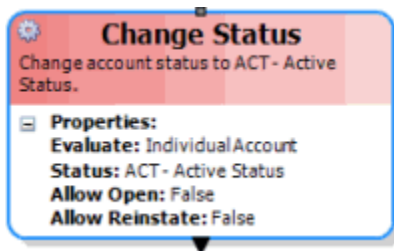
3. Click the Search icon next to the **Desk** box. The **Select Desks** dialog box appears.
4. Click the desk and then click **Open**. WorkFlow Designer populates the **Desk** box in the **Edit Change Desk Activity** dialog box with the specified desk.
5. In the **Evaluate Links** list box, click the method for changing linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Change Desk Activity** dialog box with the specified custom group.
6. To include closed accounts when changing the desk, select **Include closed accounts**.
7. Click **OK**. WorkFlow Designer updates the Change Desk activity in the workflow.

Change Status

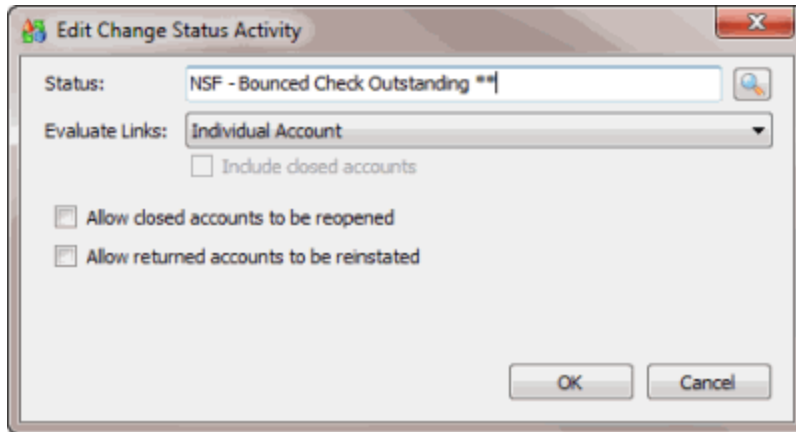
Use the **Edit Change Status Activity** dialog box to specify the criteria for changing the status of accounts and if applicable, close accounts.

To modify a Change Status activity

1. Create or open a workflow with a Change Status activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Change Status activity. The **Edit Change Status Activity** dialog box appears.



Status: Status to assign to the account.

Evaluate Links: Indicates whether to change the status for all linked accounts or just specific accounts.

Individual Account: Changes the status for the account that is moving through the workflow only.

Link Driver: Changes the status for the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Changes the status for all linked accounts within the specified custom customer group.

Customer: Changes the status for all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Changes the status for all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Changes the status for all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Changes the status for all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Changes the status for all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Changes the status for all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Changes the status for all linked accounts.

Include closed accounts: If selected, changes the status for accounts that fit the link criteria, even if they have a 998 or 999 queue level (closed status).

Allow closed accounts to be reopened: If selected, changes accounts with a closed status to the selected status, and changes the queue level to 100.

Allow returned accounts to be reinstated: If selected, changes accounts with a closed and returned status to the selected status, and changes the queue level to 100.

Return accounts that are closed: If selected, changes the queue level to 999. This option is only available when changing accounts to a "closed" status.

3. Click the Search icon next to the **Status** box. The **Select Status** dialog box appears. A green icon represents an active status code and a red icon represents an inactive status code.
4. Click the status and then click **Open**. WorkFlow Designer populates the **Status** box in the **Edit Change Status Activity** dialog box with the specified status.
5. In the **Evaluate Links** list box, click the method for changing linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Change Status Activity** dialog box with the specified custom group.
6. To include closed accounts when changing the status, select **Include closed accounts**.
7. To reopen closed accounts when changing the status, select **Allow closed accounts to be reopened**.
8. To reinstate returned accounts when changing the status, select **Allow returned accounts to be reinstated**.
9. To return closed accounts, select **Return accounts that are closed**.
10. Click **OK**. WorkFlow Designer updates the Change Status activity in the workflow.

Custom Queue

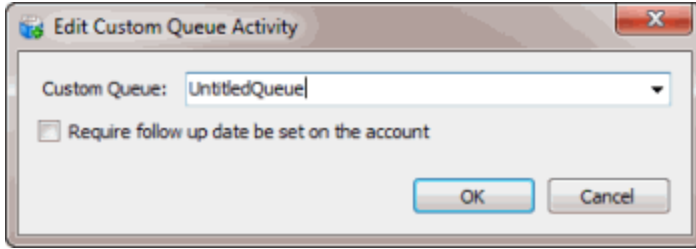
Use the **Edit Custom Queue Activity** dialog box to specify the criteria for adding accounts to a custom queue.

To modify a Custom Queue activity

1. Create or open a workflow with a Custom Queue activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Custom Queue activity. The **Edit Custom Queue Activity** dialog box appears.



Custom Queue: Custom queue to assign to the account.

Require follow up date be set on the account: If selected, the **Account Follow Up** dialog box appears after a user works the accounts in the custom queue.

3. In the **Custom Queue** list box, do one of the following:
 - To select an existing custom queue, click the custom queue.
 - To create a custom queue, type a name for the custom queue.
4. To require a follow-up date on the account, select **Require follow up date be set on the account**.
5. Click **OK**. WorkFlow Designer updates the Custom Queue activity in the workflow.

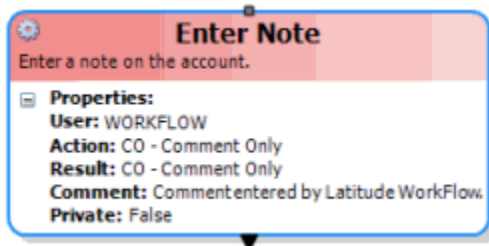
Enter Note

Use the **Edit Enter Note Activity** dialog box to specify the criteria for adding a note to accounts. You can specify non-standard action and result codes, which are codes not defined in "System Codes and Settings" in Latitude. However, be aware of the following:

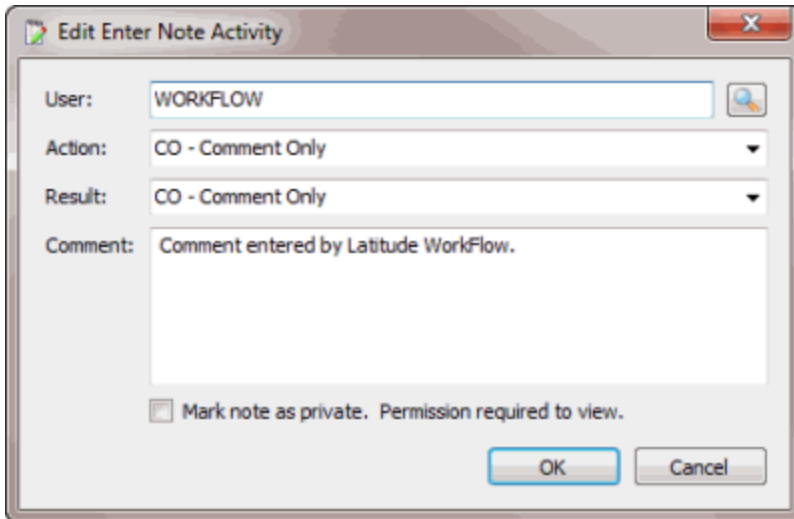
- Using non-standard action and result codes in workflows does not add them to Latitude.
- Latitude doesn't include non-standard action and results codes in account statistics for attempts, works, or contacts.
- Allowing the use of non-standard action and result codes could result in less definitive reporting.
- Latitude limits non-standard action and results codes to five characters.

To modify an Enter Note activity

1. Create or open a workflow with an Enter Note activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Enter Note activity. The **Edit Enter Note Activity** dialog box appears.



User: User to associate to the note.

Action: Action code to associate to the note.

Result: Result code to associate to the note.

Comment: More information regarding the note.

Mark note as private: If selected, only users with the **View Private Notes** permission in Latitude can view the note.

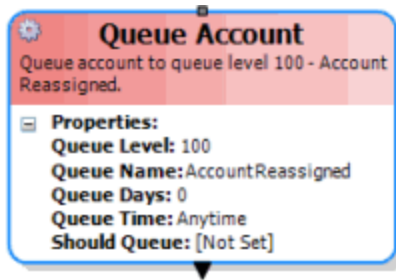
3. Click the Search icon next to the **User** box. The **Select User** dialog box appears.
4. Click the user and then click **Open**. WorkFlow Designer populates the **User** box in the **Edit Enter Note Activity** dialog box with the specified user.
5. In the **Action** list box, click or type the action code for the note.
6. In the **Result** list box, click or type the result code for the note.
7. In the **Comment** box, leave the default comment or type a new comment regarding the note.
8. To flag the note as private, select **mark note as private**.
9. Click **OK**. WorkFlow Designer updates the Enter Note activity in the workflow.

Queue Account

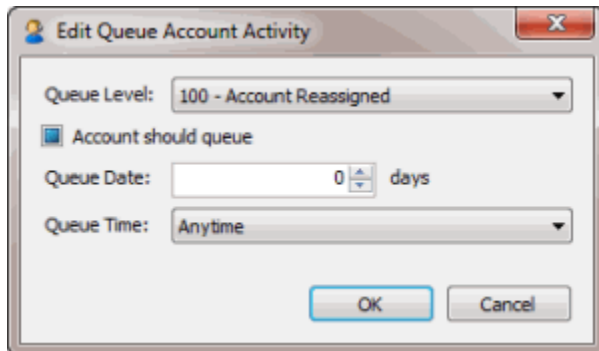
Use the **Edit Queue Account Activity** dialog box to specify the criteria for changing the queue level on accounts and setting the follow-up date and time. WorkFlow Designer doesn't change the queue level on closed accounts.

To modify a Queue Account activity

1. Create or open a workflow with a Queue Account activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Queue Account activity. The **Edit Queue Account Activity** dialog box appears.



Queue Level: Queue level to assign to the account.

Account should queue: If selected, the account continues to appear in the Collector queue so the collector can work it.

Queue Date: Number of days from the date the queue level changes that you want the account to appear in the Collector queue.

Queue Time: Time of day that you want the account to appear in the Collector queue.

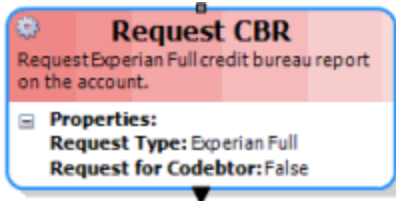
3. In the **Queue Level** list box, click the queue level to assign to accounts.
4. To have the account continue to appear in the Collector queue, select **Account should queue**.
5. In the **Queue Date** box, type or click the arrows to specify the number of days after changing the queue level the account is to appear in the Collector queue.
6. In the **Queue Time** list box, click the time of day the account is to appear in the Collector queue.
7. Click **OK**. WorkFlow Designer updates the Queue Account activity in the workflow.

Request CBR

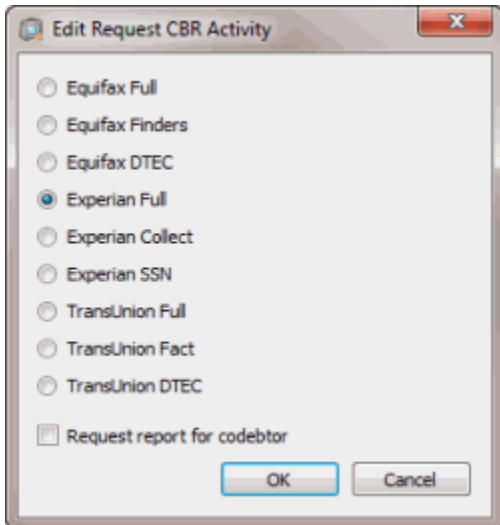
Use the **Edit Request CBR Activity** dialog box to specify the criteria for requesting a Credit Bureau Report (CBR) the next time a user creates a CBR request file. For accounts with a desk assignment, the requests that this activity creates don't affect the number of Credit Bureau requests that a desk can request monthly.

To modify a Request CBR activity

1. Create or open a workflow with a Request CBR activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Request CBR activity. The **Edit Request CBR Activity** dialog box appears.



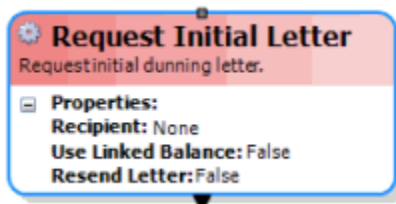
3. Click the type of report to request for the account.
4. To request a report for any co-debtors on the account, select **Request report for codebtor**.
5. Click **OK**. WorkFlow Designer updates the Request CBR activity in the workflow.

Request Initial Letter

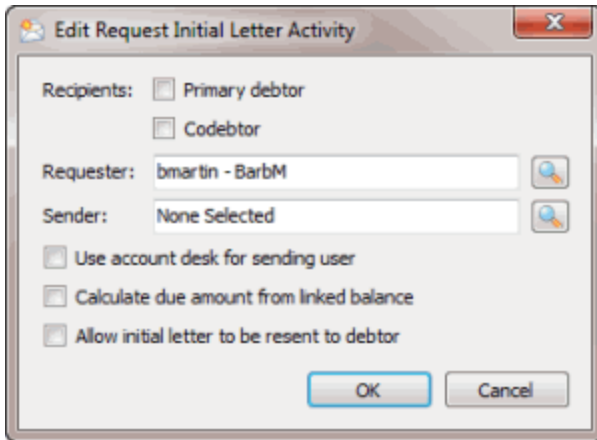
Use the **Edit Request Initial Letter Activity** dialog box to specify the criteria for creating a letter request for the initial letter configured for the customer on the accounts.

To modify a Request Initial Letter activity

1. Create or open a workflow with a Request Initial Letter activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Request Initial Letter activity. The **Edit Request Initial Letter Activity** dialog box appears.



Primary debtor: If selected, the primary debtor on the account receives the letter.

Codebtor: If selected, the co-debtor on the account receives the letter.

Requester: User to indicate as the requester of the letter.

Sender: User to indicate as the sender of the letter.

Use account desk for sending user: If selected, use the desk associated to the account as the sending user.

Calculate due amount from linked balance: If selected, the amount due includes the balances for the linked accounts.

Allow initial letter to be resent to debtor: If selected, allows you to resend the initial letter.

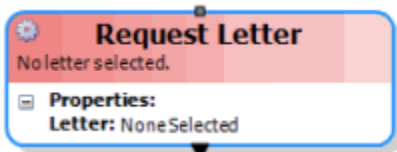
3. To send the letter to the primary debtor on the account, select **Primary debtor**.
4. To send the letter to the co-debtor on the account, select **Codebtor**.
5. Click the Search icon next to the **Requester** box. The **Select User** dialog box appears.
6. Click the user and then click **Open**. WorkFlow Designer populates the **Requester** box in the **Edit Request Initial Letter Activity** dialog box with the specified user.
7. Click the Search icon next to the **Sender** box. The **Select User** dialog box appears.
8. Click the user and then click **Open**. WorkFlow Designer populates the **Sender** box in the **Edit Request Initial Letter Activity** dialog box with the specified user.
9. To use the desk associated to the account as the sending user, select **Use account desk for sending user**.
10. To calculate the entire linked balance as the amount due, select **Calculate due amount from linked balance**.
11. To allow the initial letter to be resent to the debtor (for example, because of an address that was invalid), select **Allow initial letter to be resent to debtor**.
12. Click **OK**. WorkFlow Designer updates the Request Initial Letter activity in the workflow.

Request Letter

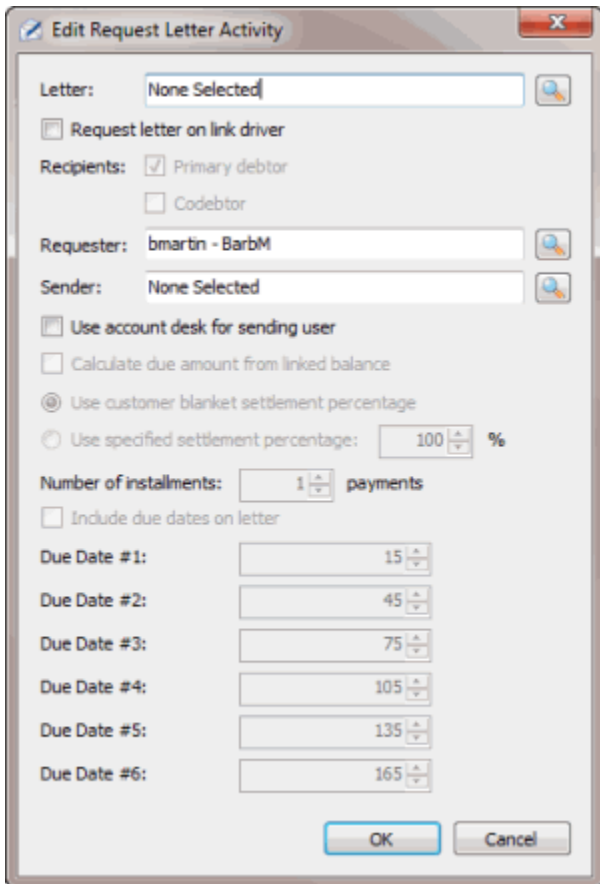
Use the **Edit Request Letter Activity** dialog box to specify the criteria for creating a letter request for the accounts.

To modify a Request Letter activity

1. Create or open a workflow with a Request Letter activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Request Letter activity. The **Edit Request Letter Activity** dialog box appears.



Letter: Letter to request for the account.

Request letter on link driver: If selected, request the letter for the link driver account.

Primary debtor: If selected, request the letter for the primary debtor on the account.

Codebtor: If selected, request the letter for the co-debtor on the account.

Requester: User to indicate as the requester of the letter.

Sender: User to indicate as the sender of the letter.

Use account desk for sending user: If selected, use the desk associated to the account as the sending user.

Calculate due amount from linked balance: If selected, the amount due includes the balances for the linked accounts.

Use customer blanket settlement percentage: If selected and you are requesting a Settled in Full (SIF) or payoff letter, the system uses the customer blanket settlement percentage in calculations.

Use specified settlement percentage: If selected and you are requesting a SIF or payoff letter, the system uses the settlement percentage you specify in calculations.

Note: The system calculates the settlement percentage for up to six payments for multi-part settlements, depending on how many payments you are offering.

Number of installments: Number of payments to offer.

Note: Settlement and payment criteria are available for settlement and payment reminder letter types, and are the same as the ones used in the **Letter Requester** program.

Include due dates on letter: If selected, the letter includes dues dates.

3. To specify the letter to request, do the following:
 - a. Click the Search icon next to the **Letter** box. The **Select Letter** dialog box appears.
 - b. Click the letter and then click **Open**. WorkFlow Designer populates the **Letter** box in the **Edit Request Letter Activity** dialog box with the specified letter.
4. To request the letter for the link driver account, select **Request letter on link driver**.
5. To send the letter to the primary debtor on the account, select **Primary debtor**.
6. To send the letter to the co-debtor on the account, select **Codebtor**.
7. To specify the letter requester, do the following:
 - . Click the Search icon next to the **Requester** box. The **Select User** dialog box appears.
 - a. Click the user and then click **Open**. WorkFlow Designer populates the **Requester** box in the **Edit Request Letter Activity** dialog box with the specified user.
8. To specify the letter sender, do the following:
 - . Click the Search icon next to the **Sender** box. The **Select User** dialog box appears.
 - a. Click the user and then click **Open**. WorkFlow Designer populates the **Sender** box in the **Edit Request Letter Activity** dialog box with the specified user.
9. To use the desk associated to the account as the sending user, select **Use account desk for sending user**.
10. To calculate the entire linked balance as the amount due, select **Calculate due amount from linked balance**.
11. If you are requesting a SIF or payoff letter, do one of the following:

To use the customer blanket settlement percentage, click **Use customer blanket settlement percentage**.

a. To indicate the settlement percentage to use, click **Use specified settlement percentage** and then type or use the arrows to specify the percentage.

12. If you are requesting a settlement or payment reminder letter, in the **Number of installments** box, type or use the arrows to specify the number of payments to offer.

13. To include dues dates in the letter, select **Include due dates on letter**.

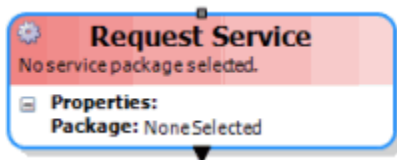
14. Click **OK**. WorkFlow Designer updates the Request Letter activity in the workflow.

Request Service

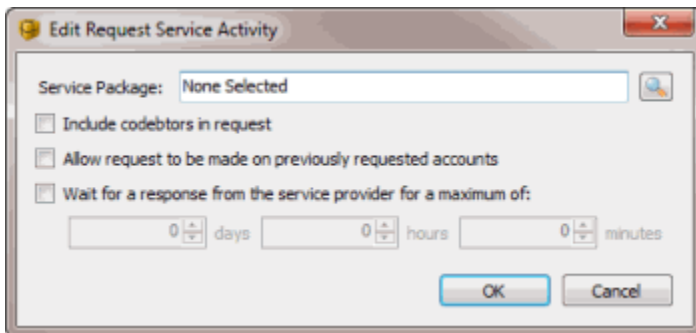
Use the **Edit Request Service Activity** dialog box to specify the criteria for creating service requests for accounts. This activity only shows Fusion Packages set up in Job Manager. Your organization must configure Job Manager for the Service Package requested, as this workflow activity only creates the request.

To modify a Request Service activity

1. Create or open a workflow with a Request Service activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Request Service activity. The **Edit Request Service Activity** dialog box appears.



Service Package: Service pages to request for the account.

Include co-debtors in request: If selected, the service request includes co-debtors.

Allow request to be made on previously requested accounts: If selected, allows requests on accounts requested previously.

Wait for a response from the service provider for a maximum of: If selected, waits for a response from the service provider a specified amount of time before moving the account to the next activity.

Days: Number of days to wait for a response.

Hours: Number of hours to wait for a response.

Minutes: Number of minutes to wait for a response.

3. Click the Search icon next to the **Service Package** box. The **Select Service Package** dialog box appears. The dialog box only lists the service packages that your organization configured in Job Manager.
4. Click the service package and then click **Open**. WorkFlow Designer populates the **Service Package** box in the **Edit Request Service Activity** dialog box with the specified service package.
5. To include co-debtors in the service request, select **Include co-debtors in request**.
6. To allow requests on accounts requested previously, select **Allow request to be made on previously requested accounts**.
7. To indicate the amount of time to wait for a response from the service provider, do the following:
 - a. Select **Wait for a response from the service provider for a maximum of**.
 - b. To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - c. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - d. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes. The activity waits for a response from the service provider. As soon as the service provider returns a response, the account moves to the next activity. If the service provider doesn't return a response, the account moves forward when the wait time has elapsed. This option doesn't ensure that the service provider returned data; it only sets a delay to wait for the data.

8. Click **OK**. WorkFlow Designer updates the Request Service activity in the workflow.

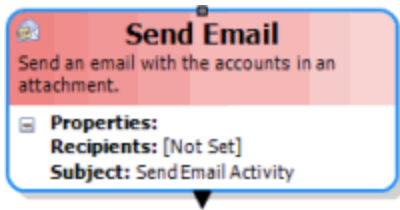
Send Email

Use the **Edit Send Email Activity** dialog box to specify the criteria for sending an email message to the specified recipients. WorkFlow Designer creates a file that includes a list of accounts that reach this point in the workflow. The file is attached to the email message. This activity is an excellent tool for testing workflows as it "reports" on accounts flowing through the activity at selected intervals by number of accounts or time frame.

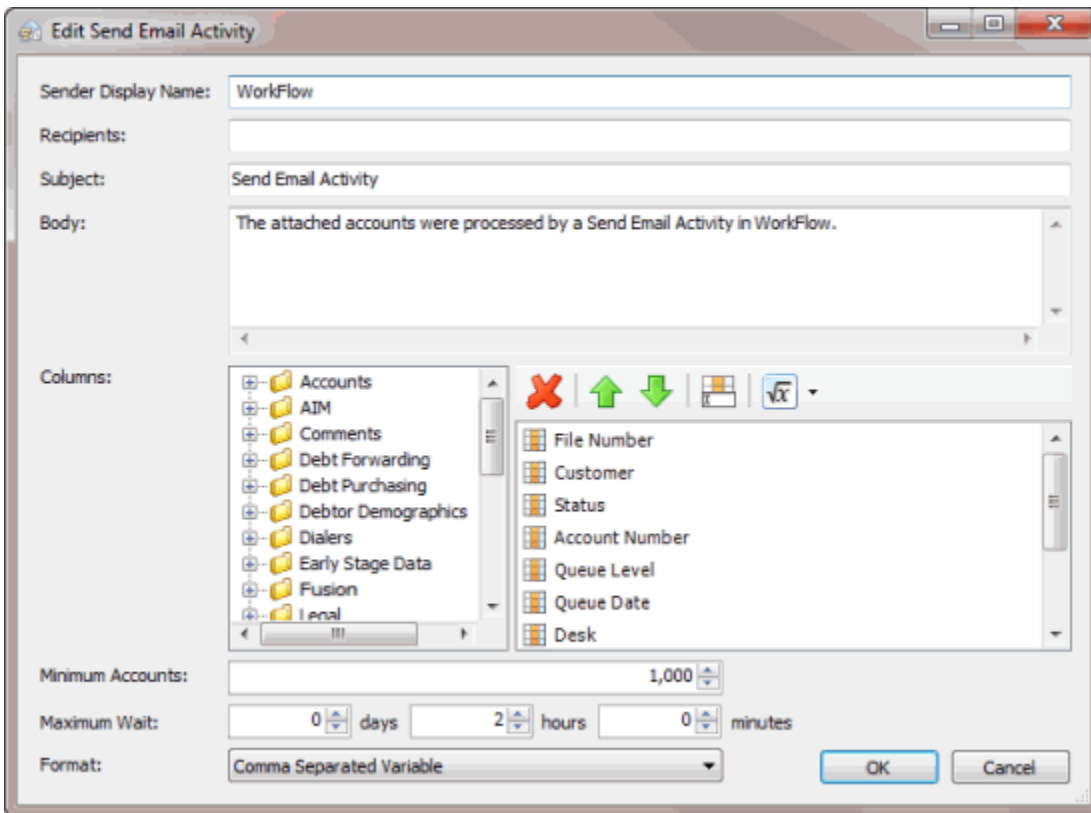
In order to send email messages, your organization must specify an email server at the system level in the **SMTP** permission in Latitude. For more information, see the *Latitude* documentation.

To modify a Send Email activity

1. Create or open a workflow with a Send Email activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



- On the workflow tab, double-click the Send Email activity. The **Edit Send Email Activity** dialog box appears.



Sender Display Name: Name to display as the sender of the email message.

Recipients: Email addresses of the email message recipients, separated by semi-colons.

Note: Keep in mind that the attached file of accounts is not encrypted. Specify email message recipients that are internal to your organization or modify the columns of data to exclude sensitive information.

Subject: Subject of the email message.

Body: Body of the email message.

Columns: Allows you to specify the columns of data to include in the file that WorkFlow Designer creates and attaches to the email message.

Minimum Accounts: Minimum number of accounts that enter this activity before sending the email message.

Maximum Wait: Amount of time to wait before sending the email message.

Days: Number of days to wait before sending the email message.

Hours: Number of hours to wait before sending the email message.

Minutes: Number of minutes to wait before sending the email message.

Format: Format for the file that WorkFlow Designer creates and attaches to the email message.

3. Specify the email message sender, recipients, subject, and body.
4. To specify the columns of data to include in the file that WorkFlow Designer creates as an attachment to the email message, do the following:
 - a. In the Columns section, expand a folder.
 - b. Drag and drop a column from the left side into the box on the right side.
 - c. To delete a column, click the column in the box on the right side and then click the Delete icon. In the confirmation dialog box, click **Yes**.
 - d. To move a column up or down in the list, click the column in the box on the right side and then click the Up or Down arrow.
 - e. To rename a column, click the column in the box on the right side and then click the Rename icon. In the blank box, type the new name and then click outside the box.
 - f. To perform an aggregate function on a column, click the column in the box on the right side, click the arrow on the Aggregate icon, and then click the type of function.
 - g. To delete an aggregate function, right-click the aggregate function in the box on the right side and then click **Delete**. In the confirmation dialog box, click **Yes**.
5. To specify the minimum number of accounts that enter this activity before sending the email, in the **Minimum Accounts** box, type or use the arrows to specify the number.
6. To indicate the amount of time to wait before sending the email message, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes. The activity waits until it reaches the minimum accounts, or it reaches the maximum wait time, whichever occurs first.

7. In the **Format** list box, click the format for the email message attachment.
8. Click **OK**. WorkFlow Designer updates the Send Email activity in the workflow.

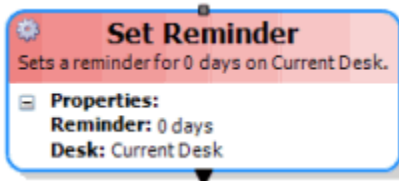
Set Reminder

Use the **Edit Set Reminder Activity** dialog box to specify the criteria for setting a reminder on accounts for a specified desk. Note the following:

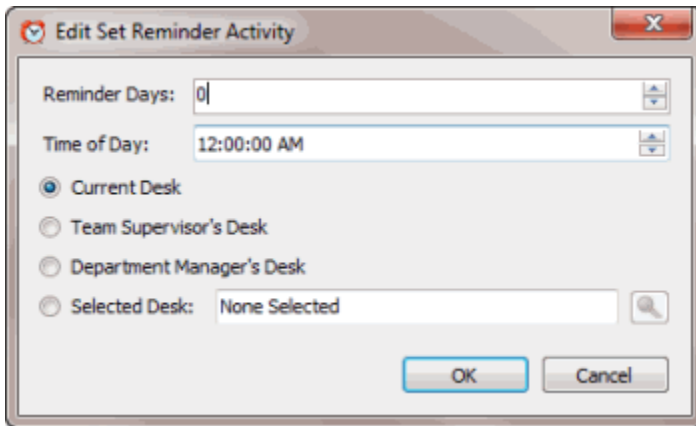
- Reminders appear on the user's desk at the specified date and time when the user logs on to Latitude. Otherwise, the reminder appears when the user logs on after that date and time.
- Accounts with reminders have a queue level of "000" and are not queued for work until the user dismisses the reminder. Timely follow-up and dismissal of reminders keeps accounts moving.

To modify a Set Reminder activity

1. Create or open a workflow with a Set Reminder activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Set Reminder activity. The **Edit Set Reminder Activity** dialog box appears.



Reminder Days: Number of days from the date the account enters this activity that you want the reminder to appear on the account.

Time of Day: Time of day you want the reminder to appear.

Current Desk: If selected, the reminder appears on the account for the desk assigned to the account.

Team Supervisor's Desk: If selected, the reminder appears on the account for the supervisor's desk.

Department Manager's Desk: If selected, the reminder appears on the account for the department manager's desk.

Selected Desk: If selected, the reminder appears on the account for the specified desk.

3. Type or use the arrows to specify the number of reminder days and time of day.
4. Do one of the following:
 - To set a reminder on the account for the desk assigned to the account, click **Current Desk**.

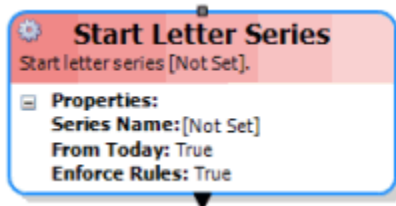
- To set a reminder on the account for the supervisor's desk, click **Team Supervisor's Desk**.
 - To set a reminder on the account for the department manager's desk, click **Department Manager's Desk**.
 - To set a reminder on the account for the specified desk, click **Selected Desk**. Click the Search icon. In the **Select Desks** dialog box, click the desk and then click **Open**.
5. Click **OK**. WorkFlow Designer updates the Set Reminder activity in the workflow.

Start Letter Series

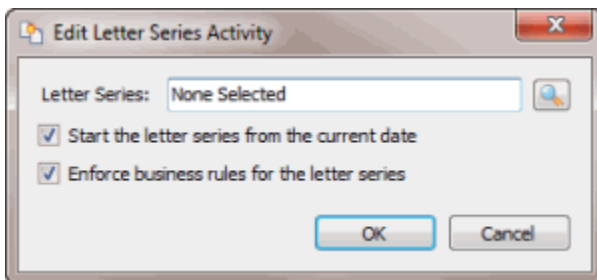
Use the **Edit Letter Series Activity** dialog box to specify the criteria for starting a letter series on accounts. Letter series, whether used in Latitude manually or applied as an activity to a workflow, does not evaluate accounts for response to collection efforts. Letters in a letter series continue until completed or stopped. Add a letter series to workflows using the Request Letter and Query activities alternately to discontinue letters for responsive (for example, effort to pay) accounts.

To modify a Start Letter Series activity

1. Create or open a workflow with a Start Letter Series activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Start Letter Series activity. The **Edit Letter Series Activity** dialog box appears.



Letter Series: Name of the letter series to start.

Start the letter series from the current date: If selected, the letter series starts on the date the account entered this activity. If cleared, WorkFlow Designer considers the letter series as started on the receive date and doesn't generate past due letters.

Enforce business rules for the letter series: If selected, WorkFlow Designer enforces the business rules set for the letter series in Letter Console.

3. In the **Letter Series** list box, do the following:
 - a. Click the Search icon. The **Select Letter Series** dialog box appears.

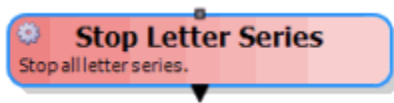
- b. Click the letter series and then click **Open**. WorkFlow Designer populates the **Letter Series** box in the **Edit Letter Series Activity** dialog box with the specified letter series.
 4. To start the letter series on the current date, select **Start the letter series from the current date**.
 5. To enforce the business rules for the letter series, select **Enforce business rules for the letter series**.
 6. Click **OK**. WorkFlow Designer updates the Start Letter Series activity in the workflow.

Stop Letter Series

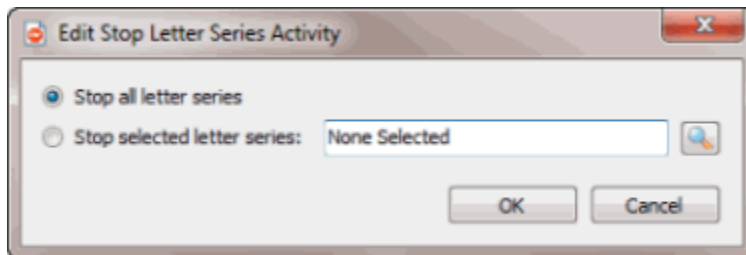
Use the **Edit Stop Letter Series Activity** dialog box to specify the criteria for stopping a letter series on accounts.

To modify a Stop Letter Series activity

1. Create or open a workflow with a Stop Letter Series activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Stop Letter Series activity. The **Edit Stop Letter Series Activity** dialog box appears.



Stop all letter series: If selected, stops all letter series.

Stop selected letter series: If selected, stops the selected letter series.

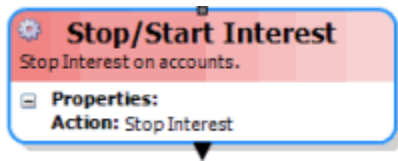
3. Do one of the following:
 - To stop all letter series, click **Stop all letter series**.
 - To stop a specific letter series, click **Stop selected letter series**. Click the Search icon. The **Select Letter Series** dialog box appears. Click the letter series and then click **Open**.
4. Click **OK**. WorkFlow Designer updates the Stop Letter Series activity in the workflow.

Start/Stop Interest

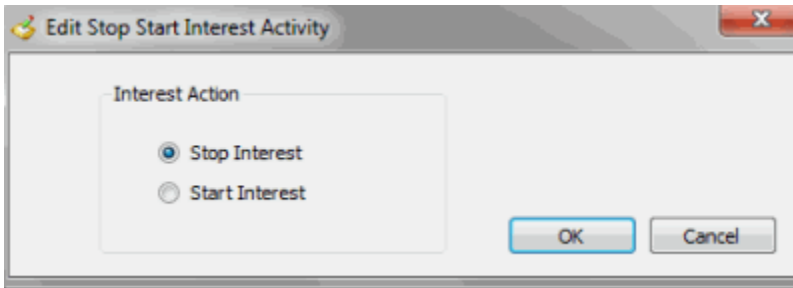
Use the **Edit Stop Start Interest Activity** dialog box to start or stop client-level interest on accounts in Latitude. Ensure that your organization configured interest at the client level. For more information, see "Client Interest" in the *Latitude* documentation.

To modify a Start/Stop Interest activity

1. Create or open a workflow with a Stop/Start Interest activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Stop/Start Interest activity. The **Edit Stop Start Interest Activity** dialog box appears.



Stop Interest: If selected, Latitude stops using the client-level interest rate and begins using the account-level interest rate.

Start Interest: If selected, Latitude starts using the client-level interest rate instead of the account-level interest rate.

3. Click an action and then click **OK**. WorkFlow Designer updates the **Stop/Start Interest** activity in the workflow.

Stored Procedure

Use the **Edit Stored Procedure Activity** dialog box to specify the criteria for running a stored procedure.

The simplest way to apply custom logic to a workflow is to create a stored procedure that the Stored Procedure activity can run. The stored procedure works with WorkFlow Designer using the #WorkflowExec and #WorkflowAcct temporary tables. The Stored Procedure activity handles moving all affected accounts to the next activity in the workflow. The following is an example of a stored procedure for WorkFlow Designer:

```
CREATE PROCEDURE [dbo].[Workflow_AddCustomNote]
    @Action VARCHAR(5),
    @Result VARCHAR(5),
    @Comment VARCHAR(255)
AS
INSERT INTO [dbo].[Notes] ([number], [user0], [created], [action], [result], [comment])
SELECT [AccountID], 'Workflow', GETDATE(), @Action, @Result, @Comment
FROM #WorkflowAcct;
```

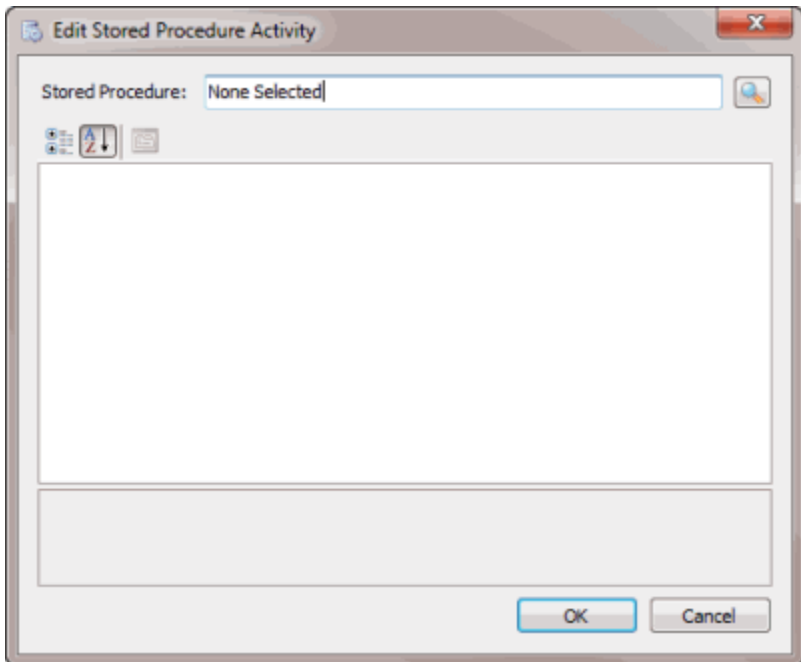
Some stored procedures can accept parameters and you can specify those parameters in the Stored Procedure activity.

To modify a Stored Procedure activity

1. Create or open a workflow with a Stored Procedure activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).

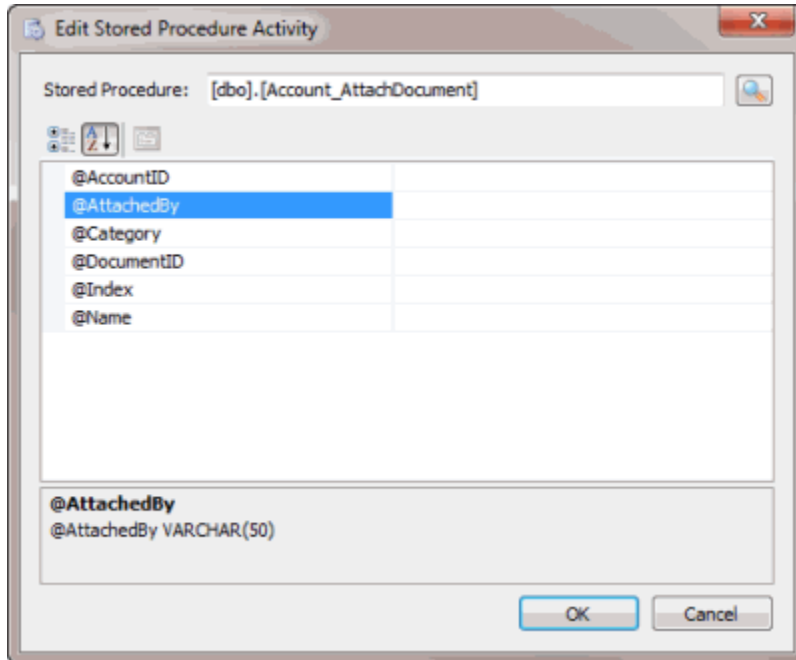


2. On the workflow tab, double-click the Stored Procedure activity. The **Edit Stored Procedure Activity** dialog box appears.



Stored Procedure: Stored procedure to run.

3. In the **Stored Procedure** list box, do the following:
 - a. Click the Search icon. The **Select Stored Procedure** dialog box appears.
 - b. Click the stored procedure and then click **Open**. WorkFlow Designer populates the **Stored Procedure** box in the **Edit Stored Procedure Activity** dialog box with the specified stored procedure. If the stored procedure accepts parameters, they display in the box. When you select a parameter, as in the example, the type of data and maximum length appear in the lower section of the dialog box.



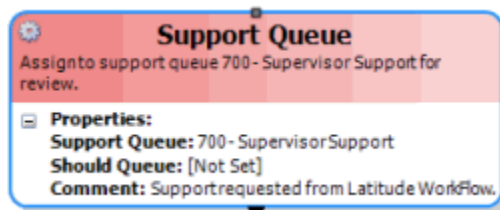
4. To specify values for the parameters, in the box next to a parameter, type a value.
5. Click **OK**. WorkFlow Designer updates the Stored Procedure activity in the workflow.

Support Queue

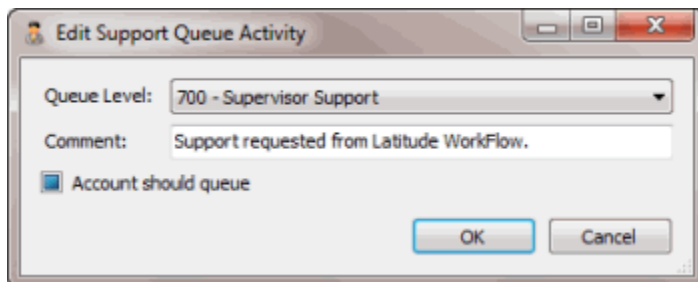
Use the **Edit Support Queue Activity** dialog box to specify the criteria for creating a support queue (clerical or supervisor) request for accounts and changing the queue level.

To modify a Support Queue activity

1. Create or open a workflow with a Support Queue activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Support Queue activity. The **Edit Support Queue Activity** dialog box appears.



Queue Level: Queue level to assign to the account.

Comment: Information regarding the request.

Account should queue: If selected, the account continues to appear in the Collector queue so the collector can work it.

3. In the **Queue Level** list box, click the queue level to assign to the account.
4. In the **Comment** box, keep the default comment or change it.
5. To have the account continue to appear in the Collector queue, select **Account should queue**.
6. Click **OK**. WorkFlow Designer updates the Support Queue activity in the workflow.

Condition Activities

Condition Activities

Condition activities evaluate a specific condition against accounts or their links and move accounts to the next step. Condition activities have two endpoints: true and false. The true endpoint (in green) is the path for accounts that meet the condition. The false endpoint (in red) is the path for accounts that don't meet the condition. If you don't connect an endpoint to an activity, it signifies the end of the workflow.

The Duration setting determines what happens to accounts that do not initially meet the condition. If the Duration setting is zero (default), the WorkFlow Engine moves the accounts to the activity connected to the false (red) endpoint. If the Duration setting is greater than zero, accounts wait at that activity and the next evaluation date is based on the value in the Retry setting. The accounts are not eligible for processing again until the retry period has passed, at which time the WorkFlow Engine reevaluates them. If the account meets the criteria, it moves to the activity connected to the true (green) endpoint; otherwise, it waits for another retry period. The WorkFlow Engine continues to reevaluate the account at every point where the retry period has elapsed until the total time the account has been waiting meets the specified duration period. Once an account reaches the duration period and it still does not meet the criteria, the WorkFlow Engine moves the account to the activity connected to the false (red) endpoint.

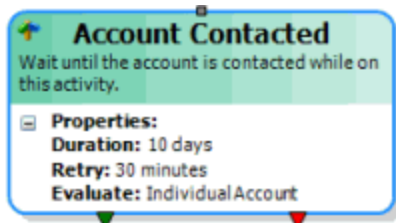
Exceptions to these rules are the **Account Linked** and **Switch** conditions. For more information, see [Account Linked](#) and [Switch](#).

Account Contacted

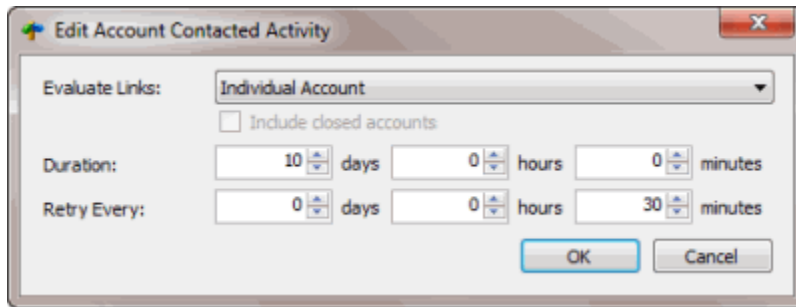
Use the **Edit Account Contacted Activity** dialog box to specify the criteria for determining whether a user or the dialer contacts an account during a specified time period. Determination begins when the account reaches this activity, and is based on the action and result codes provided in the account notes.

To modify an Account Contacted activity

1. Create or open a workflow with an Account Contacted activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Account Contacted activity. The **Edit Account Contacted Activity** dialog box appears.



Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and a user or the dialer doesn't contact the

account, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The Workflow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. Workflow Designer populates the **Custom Group** box in the **Edit Account Contacted Activity** dialog box with the specified custom group.
4. To include closed accounts in the evaluation, select **Include closed accounts**.
5. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
6. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

7. Click **OK**. Workflow Designer updates the Account Contacted activity in the workflow.

Account Linked

Use the Account Linked activity to hold an account until the Link Console program evaluates the account for linking. After Link Console evaluates the accounts, the WorkFlow Engine moves the accounts to an endpoint based on their link status. Link Console does not evaluate new business accounts that users add to Latitude manually.



Green endpoint: If the account is the link driver, the account moves along this path.

Blue endpoint: If the account is not the link driver, the account moves along this path.

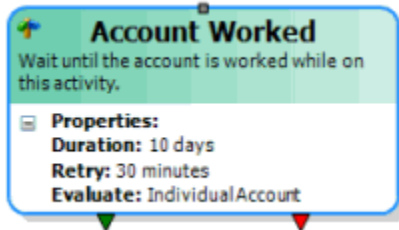
Red endpoint: If the account is not a linked account, it moves along this path.

Account Worked

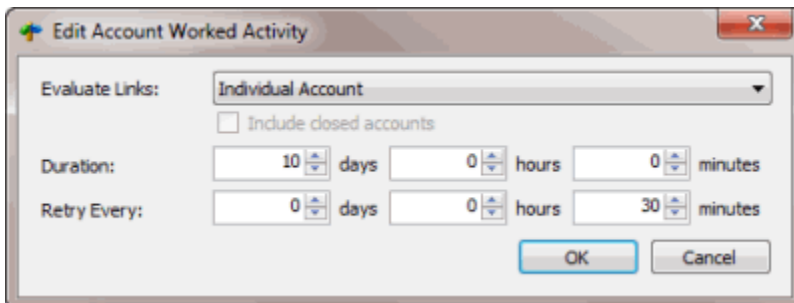
Use the **Edit Account Worked Activity** dialog box to specify the criteria for determining whether a user or the dialer works an account during a specified time period. Determination begins when the account reaches this activity, and is based on the action and result codes provided in the account notes.

To modify an Account Worked activity

1. Create or open a workflow with an Account Worked activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Account Worked activity. The **Edit Account Worked Activity** dialog box appears.



Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and a user or the dialer doesn't work the account, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The Workflow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. Workflow Designer populates the **Custom Group** box in the **Edit Account Worked Activity** dialog box with the specified custom group.

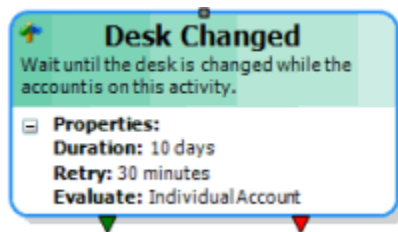
4. To include closed accounts in the evaluation, select **Include closed accounts**.
 5. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
 6. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
- Note:** You can use a combination of days, hours, and minutes for the duration and retry settings.
7. Click **OK**. WorkFlow Designer updates the Account Worked activity in the workflow.

Desk Changed

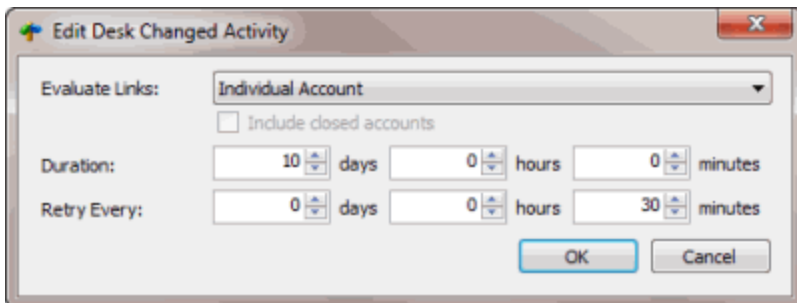
Use the **Edit Desk Changed Activity** dialog box to specify the criteria for determining whether the desk changes on an account during a specified time period. Determination begins when the account reaches this activity.

To modify a Desk Changed activity

1. Create or open a workflow with a Desk Changed activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Desk Changed activity. The **Edit Desk Changed Activity** dialog box appears.



Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and the account desk does not change, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Desk Changed Activity** dialog box with the specified custom group.
4. To include closed accounts in the evaluation, select **Include closed accounts**.
5. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
6. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

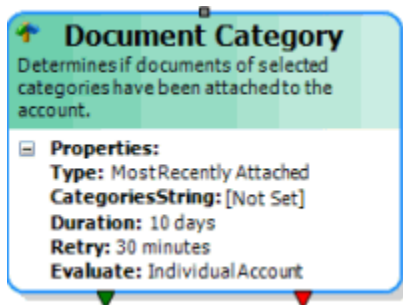
7. Click **OK**. WorkFlow Designer updates the Desk Changed activity in the workflow.

Document Category

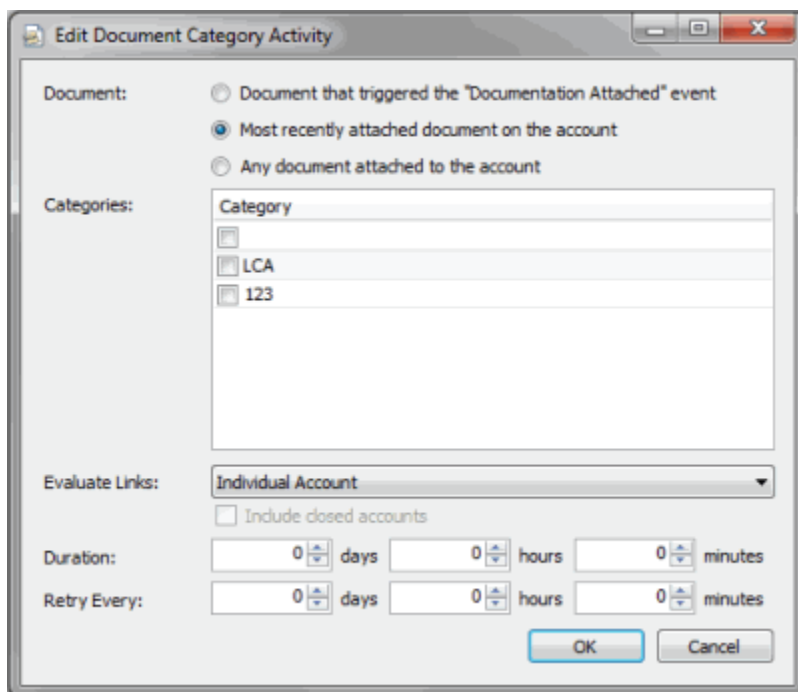
Use the **Edit Document Category Activity** dialog box to specify the criteria for determining whether a user attached documents to an account during a specified time period. Determination begins when the account reaches this activity.

To modify a Document Category activity

1. Create or open a workflow with a Document Category activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Document Category activity. The **Edit Document Category Activity** dialog box appears.



Document that triggered the "Documentation Attached" event: If selected, the WorkFlow Engine only evaluates the document that triggered the Documentation Attached event.

Most recently attached document on the account: If selected, the WorkFlow Engine only evaluates the document that was attached to the account most recently.

Any document attached to the account: If selected, the WorkFlow Engine evaluates any document that was attached to the account.

Categories: Document categories to evaluate.

Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and the account desk does not change, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Document Category Activity** dialog box with the specified custom group.

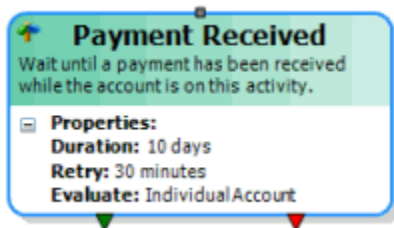
4. To include closed accounts in the evaluation, select **Include closed accounts**.
 5. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
 6. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
- Note:** You can use a combination of days, hours, and minutes for the duration and retry settings.
7. Click **OK**. WorkFlow Designer updates the Document Category activity in the workflow.

Payment Received

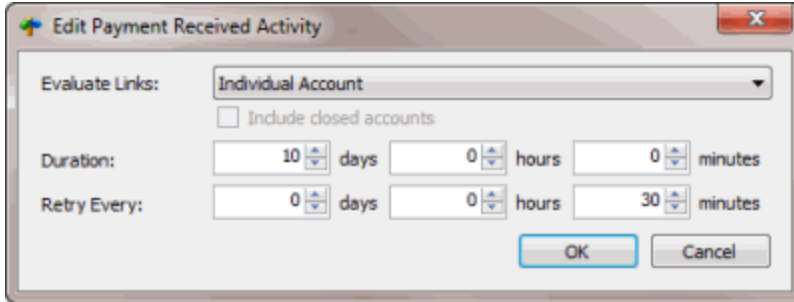
Use the **Edit Payment Received Activity** dialog box to specify the criteria for determining whether a user records a payment on an account during a specified time period. Determination begins when the account reaches this activity.

To modify a Payment Received activity

1. Create or open a workflow with a Payment Received activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Payment Received activity. The **Edit Payment Received Activity** dialog box appears.



Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and a user doesn't record a payment on the account, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Payment Received Activity** dialog box with the specified custom group.
4. To include closed accounts in the evaluation, select **Include closed accounts**.
5. In the **Duration** section, do the following:
 - a. To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - b. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - c. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
6. In the **Retry Every** section, do the following:
 - a. To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - b. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - c. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

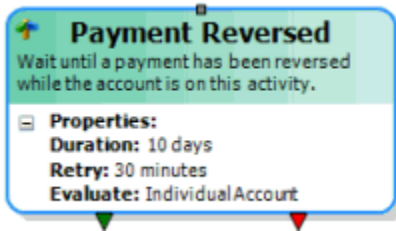
7. Click **OK**. WorkFlow Designer updates the Payment Received activity in the workflow.

Payment Reversed

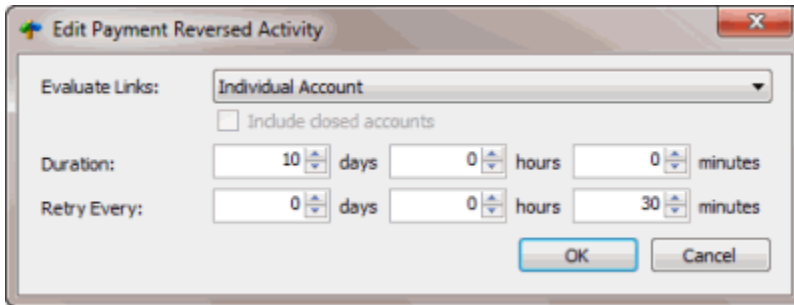
Use the **Edit Payment Reversed Activity** dialog box to specify the criteria for determining whether a user reverses a payment on an account during a specified time period. Determination begins when the account reaches this activity. Payment reversals that a user added previously do not evaluate to true.

To modify a Payment Reversed activity

1. Create or open a workflow with a Payment Reversed activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Payment Reversed activity. The **Edit Payment Reversed Activity** dialog box appears.



Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and a user doesn't reverse a payment on the account, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Payment Reversed Activity** dialog box with the specified custom group.
4. To include closed accounts in the evaluation, select **Include closed accounts**.
5. In the **Duration** section, do the following:
 - a. To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - b. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - c. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
6. In the **Retry Every** section, do the following:
 - a. To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - b. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - c. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

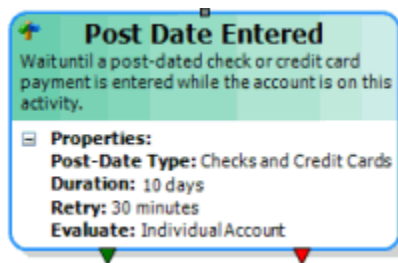
7. Click **OK**. WorkFlow Designer updates the Payment Reversed activity in the workflow.

Post Date Entered

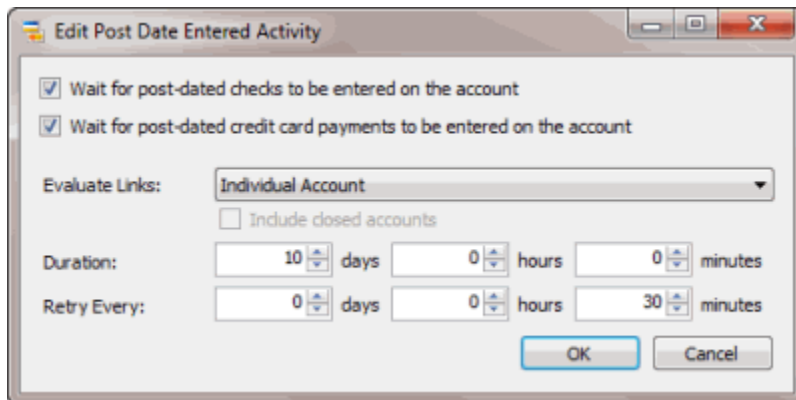
Use the **Edit Post Date Entered Activity** dialog box to specify the criteria for determining whether a user established a post-dated transaction payment arrangement for an account during a specified time period. Determination begins when the account reaches this activity. Post-dated transactions include post-dated checks, paper draft, ACH, or credit cards. Post-dated transactions that a user added previously do not evaluate to true.

To modify a Post Date Entered activity

1. Create or open a workflow with a Post Date Entered activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Payment Reversed activity. The **Edit Post Date Entered Activity** dialog box appears.



Wait for post-dated checks to be entered on the account: If selected, the activity waits for a post-dated check entry on the account.

Wait for post-dated credit card payments to be entered on the account: If selected, the activity waits for a post-dated credit card payment entry on the account.

Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and a user doesn't establish a post-dated transaction payment arrangement on the account, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. To wait for a post-dated check entry on the account, select **Wait for post-dated checks to be entered on the account**.
4. To wait for a post-dated credit card payment entry on the account, select **Wait for post-dated credit card payments to be entered on the account**.
5. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.

- b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Post Date Entered Activity** dialog box with the specified custom group.
 6. To include closed accounts in the evaluation, select **Include closed accounts**.
 7. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
 8. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

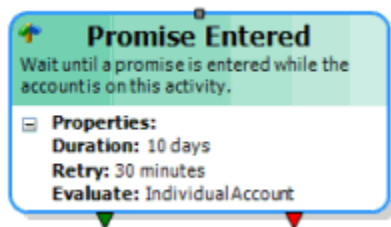
9. Click **OK**. WorkFlow Designer updates the Post Date Entered activity in the workflow.

Promise Entered

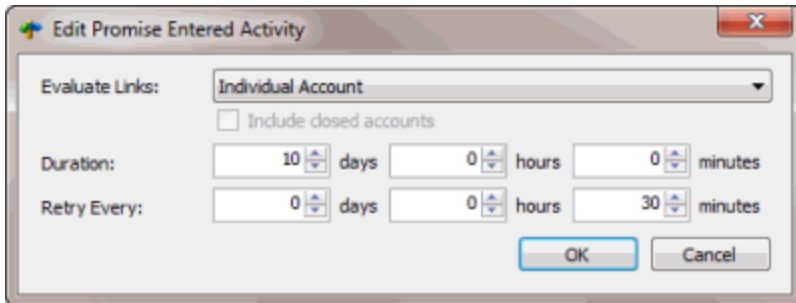
Use the **Edit Promise Entered Activity** dialog box to specify the criteria for determining whether a user creates a promise arrangement on an account during a specified time period. Determination begins when the account reaches this activity.

To modify a Promise Entered activity

1. Create or open a workflow with a Promise Entered activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Promise Entered activity. The **Edit Promise Entered Activity** dialog box appears.



Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and a user doesn't create a promise arrangement on the account, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Promise Entered Activity** dialog box with the specified custom group.
4. To include closed accounts in the evaluation, select **Include closed accounts**.
5. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
6. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

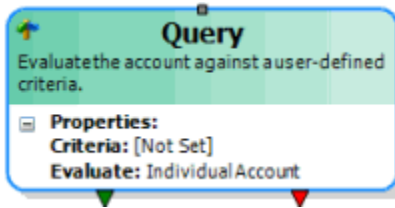
7. Click **OK**. WorkFlow Designer updates the Promise Entered activity in the workflow.

Query

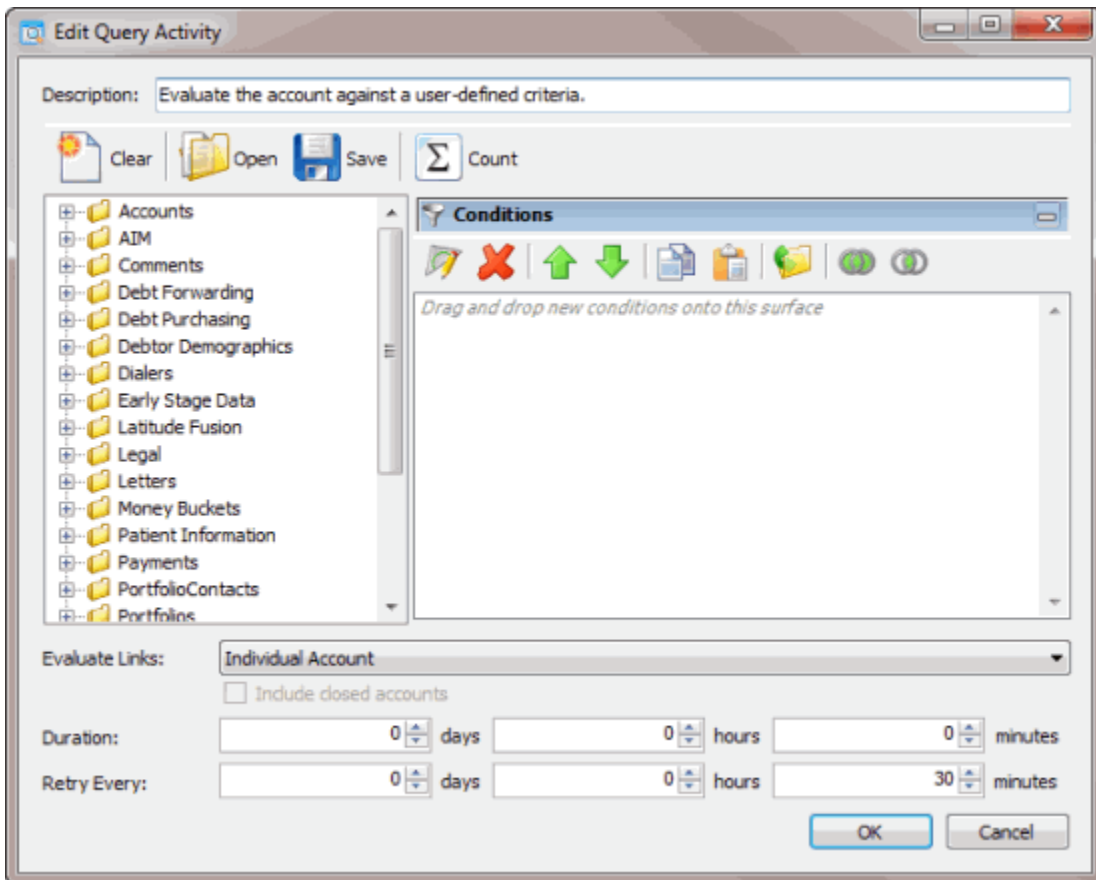
Use the **Edit Query Activity** dialog box to specify the criteria for conditional branching of workflows. The WorkFlow Engine moves accounts that enter this activity and meet the query criteria to the true (green) endpoint. The WorkFlow Engine moves accounts that don't meet the query criteria during the specified time period to the false (red) endpoint.

To modify a Query activity

1. Create or open a workflow with a Query activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Query activity. The **Edit Query Activity** dialog box appears.



Description: Description of the query, such as the purpose.

Conditions: Allows you to specify conditions for the activity. The method for creating and managing conditions is the same as for user-defined event conditions. For more information, see the related topics section in [User-defined Event Conditions](#).

Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and the account doesn't meet the condition criteria, the WorkFlow Engine moves the account to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Description** box, keep the default description, modify it, or type a new one.
4. In the **Conditions** section, specify the conditions for the activity.
5. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Query Activity** dialog box with the specified custom group.

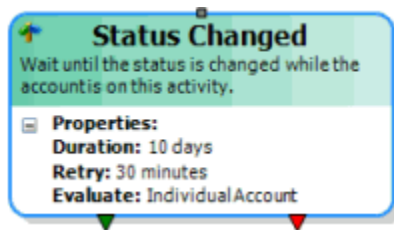
6. To include closed accounts in the evaluation, select **Include closed accounts**.
 7. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
 8. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
- Note:** You can use a combination of days, hours, and minutes for the duration and retry settings.
9. Click **OK**. Workflow Designer updates the Query activity in the workflow.

Status Changed

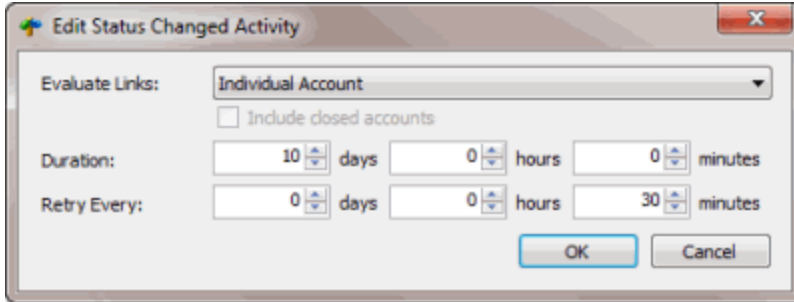
Use the **Edit Status Changed Activity** dialog box to specify the criteria for determining whether the status changes on an account during a specified time period. Determination begins when the account reaches this activity.

To modify a Status Changed activity

1. Create or open a workflow with a Status Changed activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Status Changed activity. The **Edit Status Changed Activity** dialog box appears.



Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and the account status does not change, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Status Changed Activity** dialog box with the specified custom group.
4. To include closed accounts in the evaluation, select **Include closed accounts**.
5. In the **Duration** section, do the following:
 - a. To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - b. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - c. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
6. In the **Retry Every** section, do the following:
 - a. To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - b. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - c. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

7. Click **OK**. WorkFlow Designer updates the Status Changed activity in the workflow.

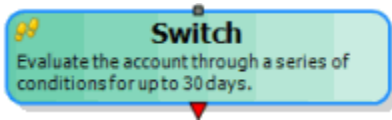
Switch

Use the **Edit Switch Activity** dialog box to specify the criteria for multiple conditions and evaluate accounts within a specified time period based on those conditions. The Switch activity is a composition action, containing multiple conditions set up in sequential order. Individual condition actions contained within a step have their own true endpoint, but the switch step as a whole has a single false endpoint. When the WorkFlow Engine processes accounts in this activity, it evaluates the conditions in the condition order listed. The WorkFlow Engine moves accounts that meet a condition to the true

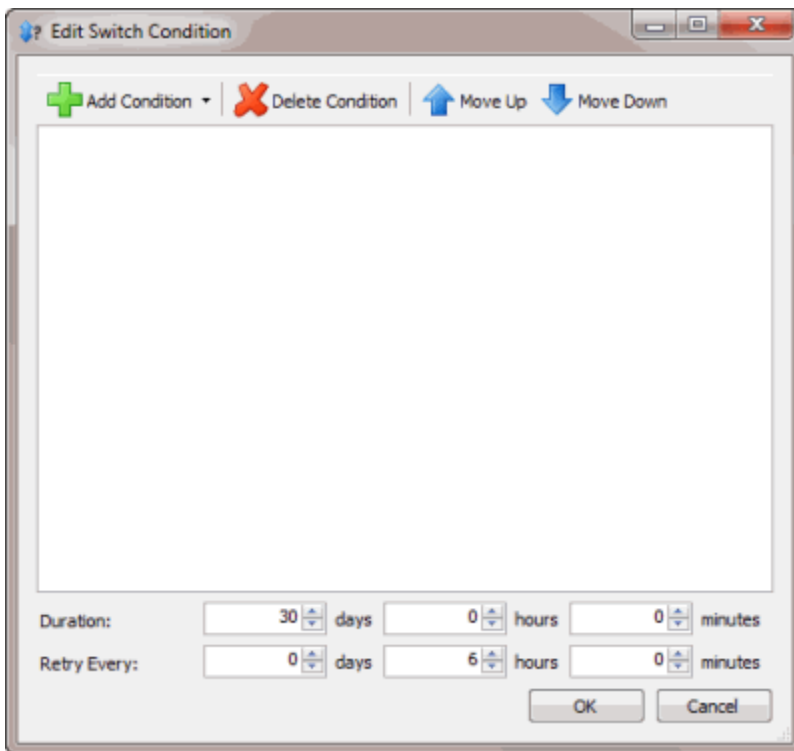
endpoint of that condition and stops processing within the switch activity. If the duration expires and the account still does not meet the criteria of any of the conditions, the WorkFlow Engine moves the account to the false endpoint for the last condition in the switch activity.

To modify a Switch activity

1. Create or open a workflow with a Switch activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Switch activity. The **Edit Switch Activity** dialog box appears.



Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and the account doesn't meet the conditions, the WorkFlow Engine moves the account to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Condition** list box, do the following:
 - a. To add a condition to the Switch activity, click **Add Condition** and then click an activity.
 - b. To specify criteria for a condition, double-click the condition in the list box. In the corresponding dialog box, specify the criteria and then click **OK**. For information about the criteria for a condition, see the topic for the specific condition activity.
 - c. To delete a condition from the Switch activity, click the condition in the list box and then click **Delete Condition**. In the confirmation dialog box, click **Yes**.
 - d. To change the processing order for a condition, click the condition in the list box and then click **Move Up** or **Move Down**.
 4. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
 5. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
- Note:** You can use a combination of days, hours, and minutes for the duration and retry settings.
6. Click **OK**. WorkFlow Designer updates the Switch activity in the workflow.

Simple Condition Activities

Simple Condition Activities

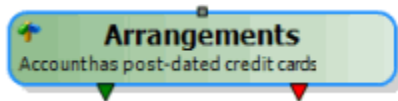
Simple condition activities evaluate the current state of accounts that move through the workflow and move the accounts to the next activity. Simple condition activities don't provide link evaluation or the ability to reevaluate accounts during a set time period.

Arrangements

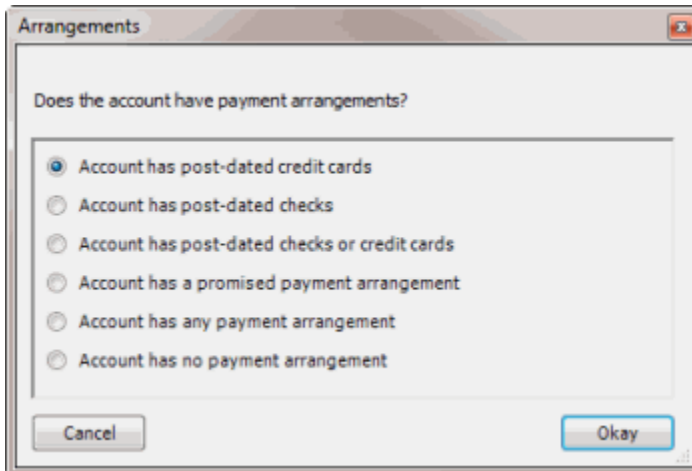
Use the **Arrangements** dialog box to specify the criteria for determining whether a payment arrangement exists on accounts. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify an Arrangement activity

1. Create or open a workflow with an Arrangements activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Arrangements activity. The **Arrangements** dialog box appears.



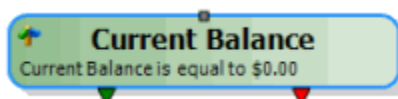
3. Click an option to indicate the payment arrangement condition to evaluate and then click **Okay**. WorkFlow Designer updates the Arrangements activity in the workflow.

Current Balance

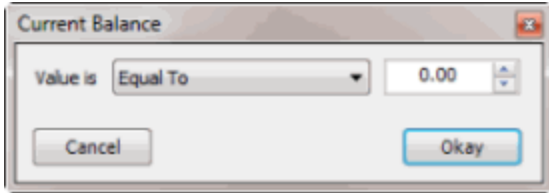
Use the **Current Balance** dialog box to specify the criteria for comparing the current balance on accounts against a specified value. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Current Balance activity

1. Create or open a workflow with a Current Balance activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Current Balance activity. The **Current Balance** dialog box appears.



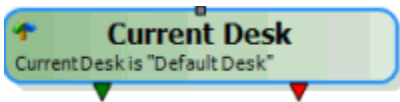
3. In the **Value is** list box, click the comparison.
4. In the value box, type or use the arrows to specify the value to compare to the current balance.
5. Click **Okay**. WorkFlow Designer updates the Current Balance activity in the workflow.

Current Desk

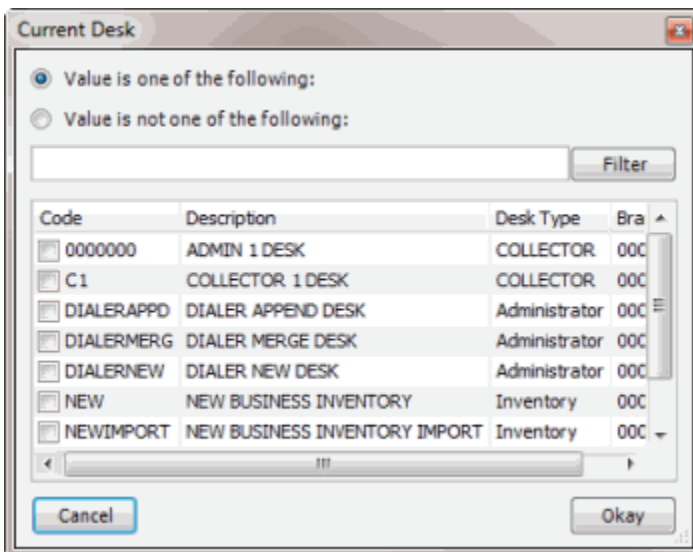
Use the **Current Desk** dialog box to specify the criteria for comparing the desk associated to accounts against a specified value. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Current Desk activity

1. Create or open a workflow with a Current Desk activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Current Desk activity. The **Current Desk** dialog box appears.



3. Do one of the following:
 - To determine whether the account belongs to a specific desk, click **Value is one of the following**.
 - To determine whether the account doesn't belong to a specific desk, click **Value is not one of the following**.

Note: You can select multiple desks for the evaluation.

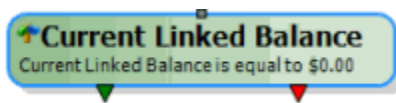
4. To filter the list of desks by code, description, desk type, or branch, type a value in the filter box and then click **Filter**. To clear the filter, clear the value in the filter box and then click **Filter**.
5. Select the check box for each desk to include in the evaluation.
6. Click **Okay**. WorkFlow Designer updates the Current Desk activity in the workflow.

Current Linked Balance

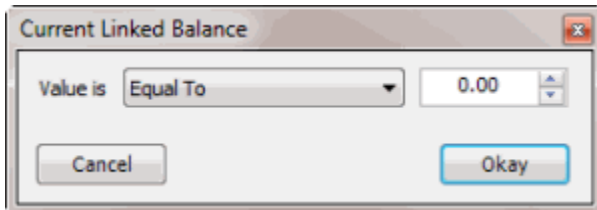
Use the **Current Linked Balance** dialog box to specify the criteria for comparing the combined current balance on all linked accounts against a specified value. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Current Linked Balance activity

1. Create or open a workflow with a Current Linked Balance activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Current Linked Balance activity. The **Current Linked Balance** dialog box appears.



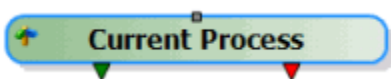
3. In the **Value is** list box, click the comparison.
4. In the value box, type or use the arrows to specify the value to compare to the current linked balance.
5. Click **Okay**. WorkFlow Designer updates the Current Linked Balance activity in the workflow.

Current Process

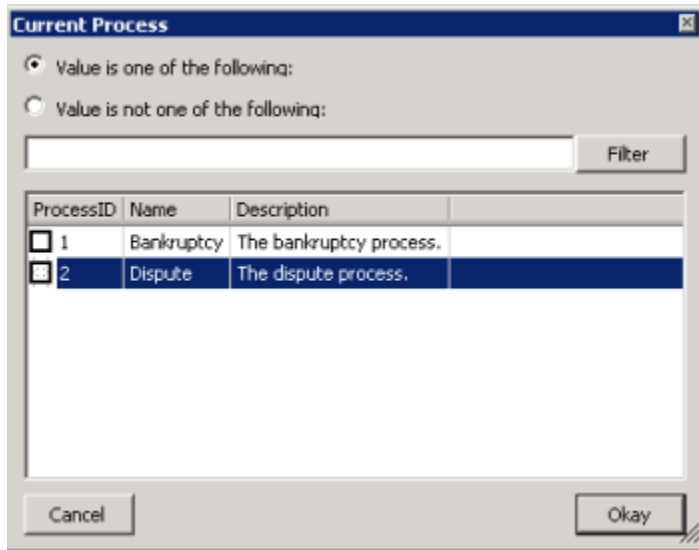
Use the **Current Process** dialog box to specify the criteria for determining whether an account is in a specific process. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Current Process activity

1. Create or open a workflow with a Current Process activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



- On the workflow tab, double-click the Current Process activity. The **Current Process** dialog box appears.



- Do one of the following:
 - To determine whether the account is in a specific process, click **Value is one of the following**.
 - To determine whether the account isn't in a specific process, click **Value is not one of the following**.

Note: You can select multiple processes for the evaluation.

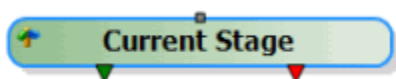
- To filter the list of processes by process ID, name, or description, type a value in the filter box and then click **Filter**. To clear the filter, clear the value in the filter box and then click **Filter**.
- Select the check box for each process to include in the evaluation.
- Click **Okay**. WorkFlow Designer updates the Current Process activity in the workflow.

Current Stage

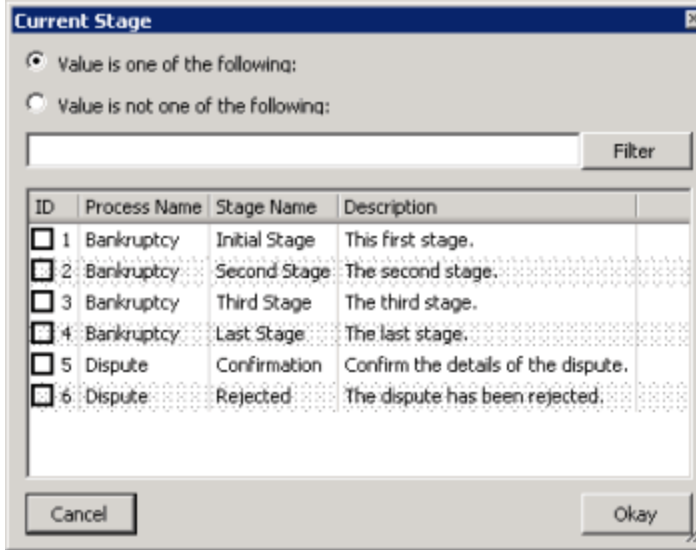
Use the **Current Stage** dialog box to specify the criteria for determining whether an account is in a specific stage. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Current Stage activity

- Create or open a workflow with a Current Stage activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



- On the workflow tab, double-click the Current Stage activity. The **Current Stage** dialog box appears.



3. Do one of the following:
 - To determine whether the account is in a specific stage, click **Value is one of the following**.
 - To determine whether the account isn't in a specific stage, click **Value is not one of the following**.

Note: You can select multiple stages for the evaluation.

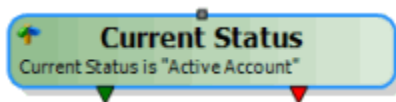
4. To filter the list of processes by ID, process name, stage name, or description, type a value in the filter box and then click **Filter**. To clear the filter, clear the value in the filter box and then click **Filter**.
5. Select the check box for each stage to include in the evaluation.
6. Click **Okay**. WorkFlow Designer updates the Current Stage activity in the workflow.

Current Status

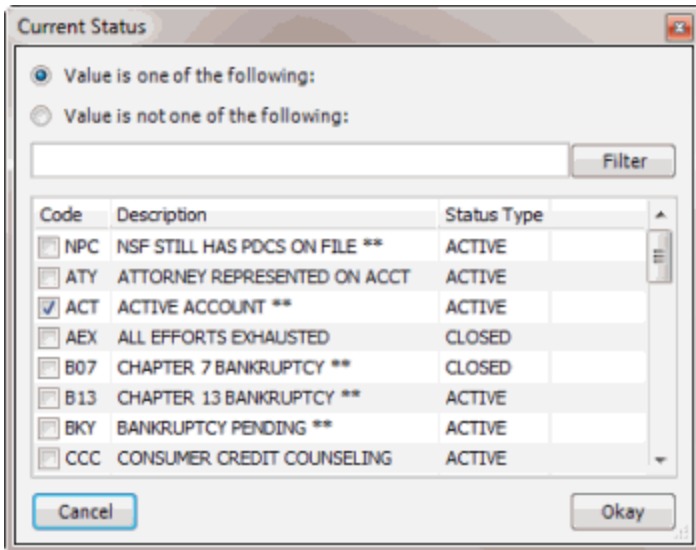
Use the **Current Status** dialog box to specify the criteria for comparing the status of accounts against a specified value. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Current Status activity

1. Create or open a workflow with a Current Status activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Current Status activity. The **Current Status** dialog box appears.



3. Do one of the following:
 - To determine whether the account has a specific status, click **Value is one of the following**.
 - To determine whether the account doesn't have a specific status, click **Value is not one of the following**.

Note: You can select multiple statuses for the evaluation.

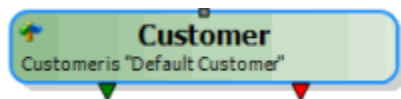
4. To filter the list of statuses by code, description, or status type, type a value in the filter box and then click **Filter**. To clear the filter, clear the value in the filter box and then click **Filter**.
5. Select the check box for each status to include in the evaluation.
6. Click **Okay**. WorkFlow Designer updates the Current Status activity in the workflow.

Customer

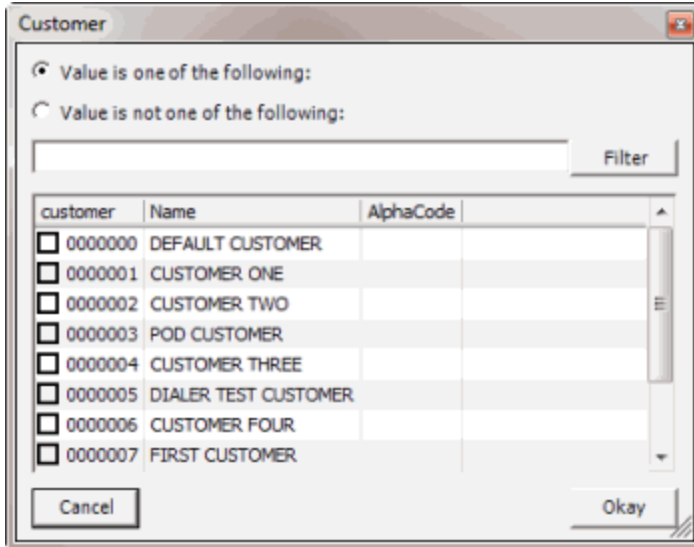
Use the **Customer** dialog box to specify the criteria for comparing the customer on accounts against a specified value. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Customer activity

1. Create or open a workflow with a Customer activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Customer activity. The **Customer** dialog box appears.



3. Do one of the following:
 - To determine whether the account is for a specific customer, click **Value is one of the following**.
 - To determine whether the account isn't for a specific customer, click **Value is not one of the following**.

Note: You can select multiple customers for the evaluation.

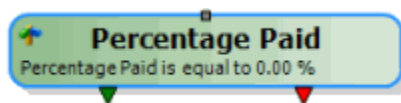
4. To filter the list of customers by customer code, name, or alpha code, type a value in the filter box and then click **Filter**. To clear the filter, clear the value in the filter box and then click **Filter**.
5. Select the check box for each customer to include in the evaluation.
6. Click **Okay**. WorkFlow Designer updates the Customer activity in the workflow.

Percentage Paid

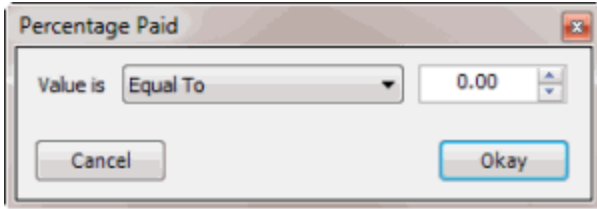
Use the **Percentage Paid** dialog box to specify the criteria for comparing the percentage of the current balance paid on accounts against a specified value. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Percentage Paid activity

1. Create or open a workflow with a Percentage Paid activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Percentage Paid activity. The **Percentage Paid** dialog box appears.



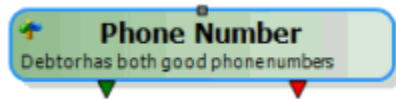
3. In the **Value is** list box, click the comparison.
4. In the value box, type or use the arrows to specify the value to compare to the percentage paid.
5. Click **Okay**. WorkFlow Designer updates the Percentage Paid activity in the workflow.

Phone Number

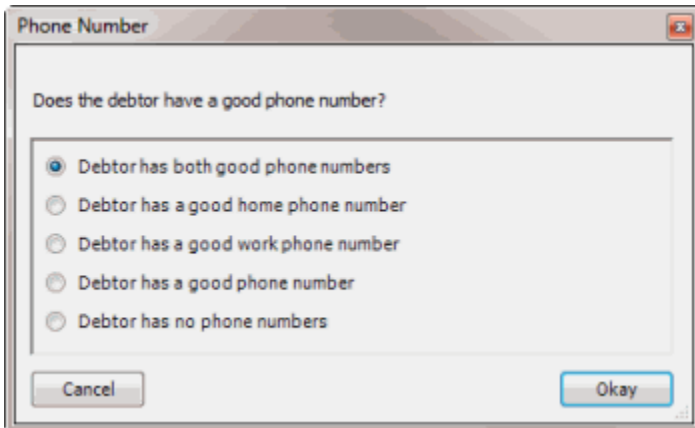
Use the **Phone Number** dialog box to specify the criteria for determining whether accounts have a valid or invalid phone number. The Workflow Engine evaluates phone numbers for all debtors on the account. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Phone Number activity

1. Create or open a workflow with a Phone Number activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Phone Number activity. The **Phone Number** dialog box appears.



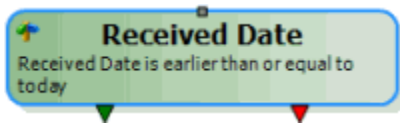
3. Click an option to indicate the phone number condition to evaluate and then click **Okay**. WorkFlow Designer updates the Phone Number activity in the workflow.

Received Date

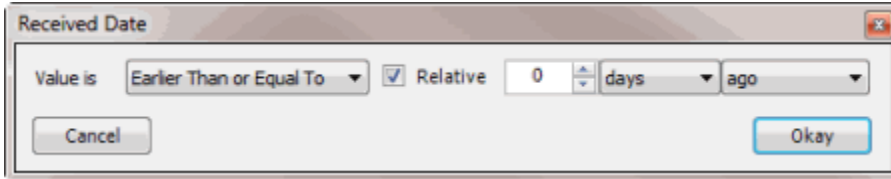
Use the **Received Date** dialog box to specify the criteria for comparing the account received date against a number of days relative to the current date. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Received Date activity

1. Create or open a workflow with a Received Date activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Received Date activity. The **Received Date** dialog box appears.



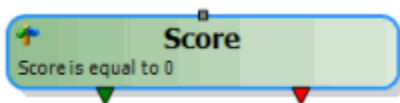
3. In the **Value is** list box, click the comparison.
4. Leave the **Relative** check box selected.
5. In the value box, type or use the arrows to specify the number of days in relation to the current date to compare to the received date.
6. In the time period list box, click **days**, **months**, or **years**.
7. In the past or future list box, click **ago** to compare to a past date or **from today** to compare to a future date.
8. Click **Okay**. WorkFlow Designer updates the Received Date activity in the workflow.

Score

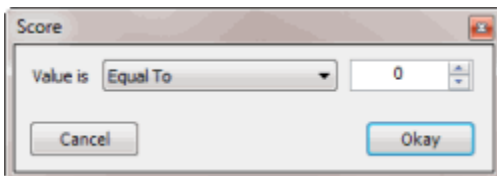
Use the **Score** dialog box to specify the criteria for comparing the score on accounts against a specified value. Scores indicate the debtor's ability to pay and are based on a scoring model that scoring companies produce. If the condition evaluates as true, the account moves to the true (green) endpoint; otherwise, it moves to the false (red) endpoint.

To modify a Score activity

1. Create or open a workflow with a Score activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Score activity. The **Score** dialog box appears.



3. In the **Value is** list box, click the comparison.
4. In the value box, type or use the arrows to specify the value to compare to the score.
5. Click **Okay**. WorkFlow Designer updates the Score activity in the workflow.

Distribution Activities

Distribution Activities

The Desk Distribution activity allows you to distribute accounts across one or more desks. You can distribute accounts based on the number of accounts or based on current account balances. You can also specify the method for distributing linked accounts. Some accounts that enter the Desk Distribution activity qualify for, but do not require distribution. Other accounts qualify but the WorkFlow Engine doesn't distribute them because of restrictions set at the desk level.

You create a distribution template to set up the pool of accounts to distribute and the desks to receive the accounts. You specify conditions to select the accounts to distribute. You can also specify conditions for the desks that receive the accounts. You can create multiple distribution templates for use in workflows.

During workflow execution, after accounts enter the Distribution activity and the distribution engine completes its process, the account is in one of the following states:

Distributed: Account meets the criteria specified in the distribution template so the WorkFlow Engine moves it to a desk (green endpoint).

Not Distributed: Account meets the criteria specified in the distribution template but the WorkFlow Engine doesn't move it to a desk because of desk constraints (red endpoint).

Exception: Account does not meet the criteria specified in the distribution template (black endpoint).

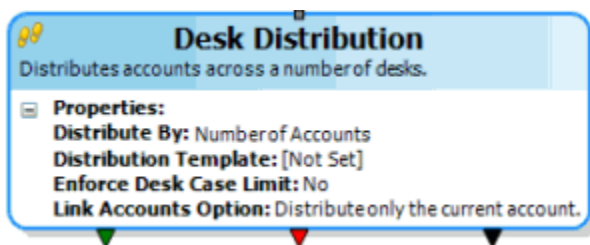
Note: The WorkFlow Engine doesn't include accounts that follow the "not distributed" or "exception" endpoints when computing the number of accounts or the sum of account balances.

Configure a Desk Distribution Activity

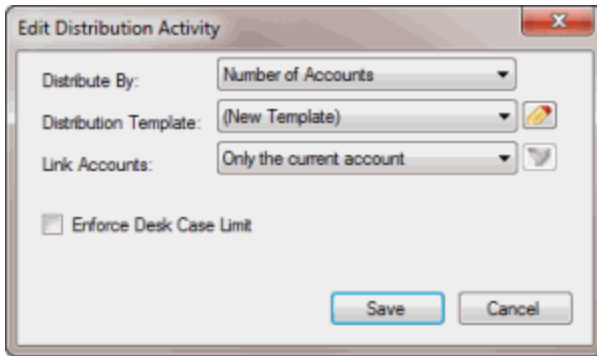
Use the **Edit Distribution Activity** dialog box to specify the criteria for distributing accounts to desks.

To configure a Desk Distribution activity

1. Create or open a workflow with a Desk Distribution activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Desk Distribution activity. The **Edit Distribution Activity** dialog box appears.



Distribute By: Method for distributing accounts. You can distribute based on the number of accounts or account balances.

Distribution Template: Template that defines the conditions for distributing accounts.

Link Accounts: Method for distributing linked accounts.

Only the current account: Distributes the account flowing through the activity, and none of its linked accounts.

Only the link driver: Distributes the link driver for the account flowing through the activity, and none of its linked accounts.

All linked accounts: Distributes all accounts linked to the account flowing through the activity.

Specific linked accounts: Distributes accounts linked to the account flowing through the activity that meet specific conditions.

Enforce Desk Case Limit: If selected, the WorkFlow Engine limits the number of accounts that a desk can receive to the maximum set in system configuration. Your organization sets this value in the Desk codes in System Codes and Settings in Latitude. For more information, see the *Latitude* documentation.

3. In the **Distribute by** list box, click the account distribution method.
4. In the **Distribution Template** list box, do one of the following:
 - To use an existing template, click the template name.
 - To add or modify a template, click the Template icon. For more information about adding a template, see [Create a Desk Distribution Template](#).
5. In the **Link Accounts** list box, select which linked accounts to distribute. If you selected **Specific linked accounts**, do the steps to [Create a Linked Accounts Query](#).
6. To limit the number of accounts allowed on a desk, select **Enforce Desk Case Limit**.
7. Click **OK**. WorkFlow Designer updates the Desk Distribution activity in the workflow.

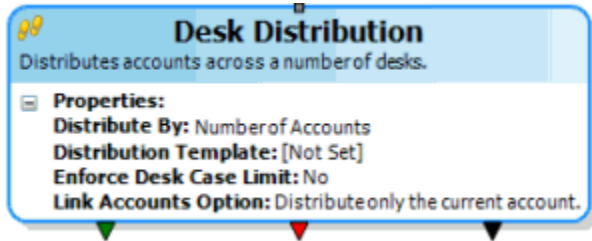
Create a Desk Distribution Template

Use the **Template Editor** dialog box to create a distribution template to use in a Desk Distribution activity. Use the **General** tab to specify the conditions that define the desks to include in the

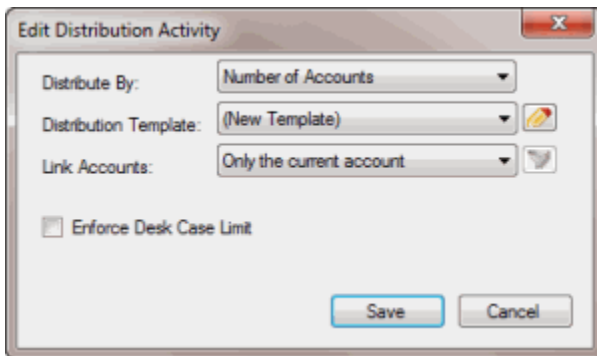
distribution. Use the **Conditions** tab to specify the conditions that define the accounts to include in the distribution.

To create a desk distribution template

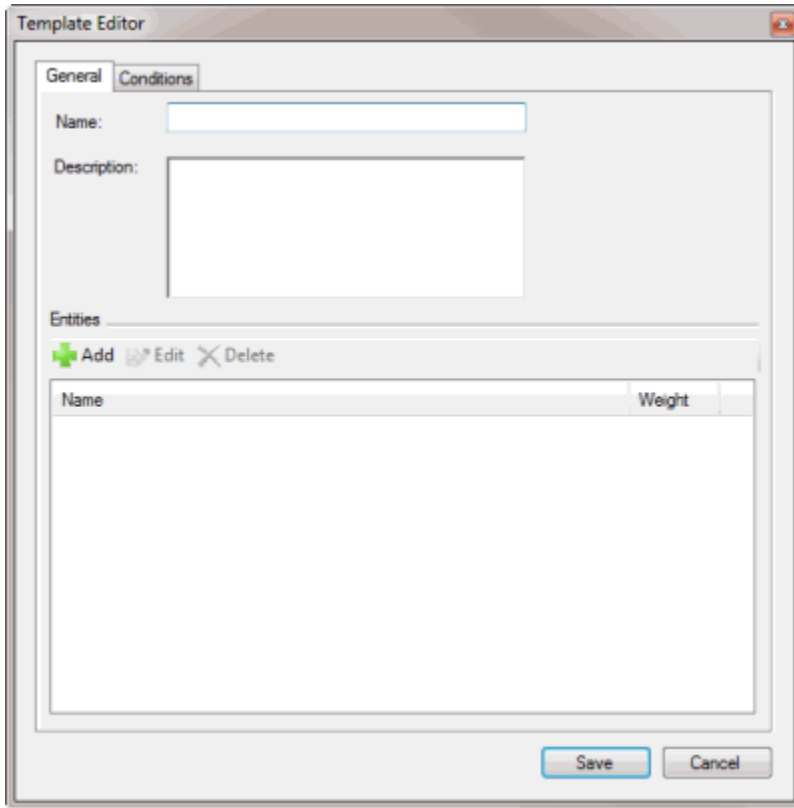
1. Create or open a workflow with a Desk Distribution activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



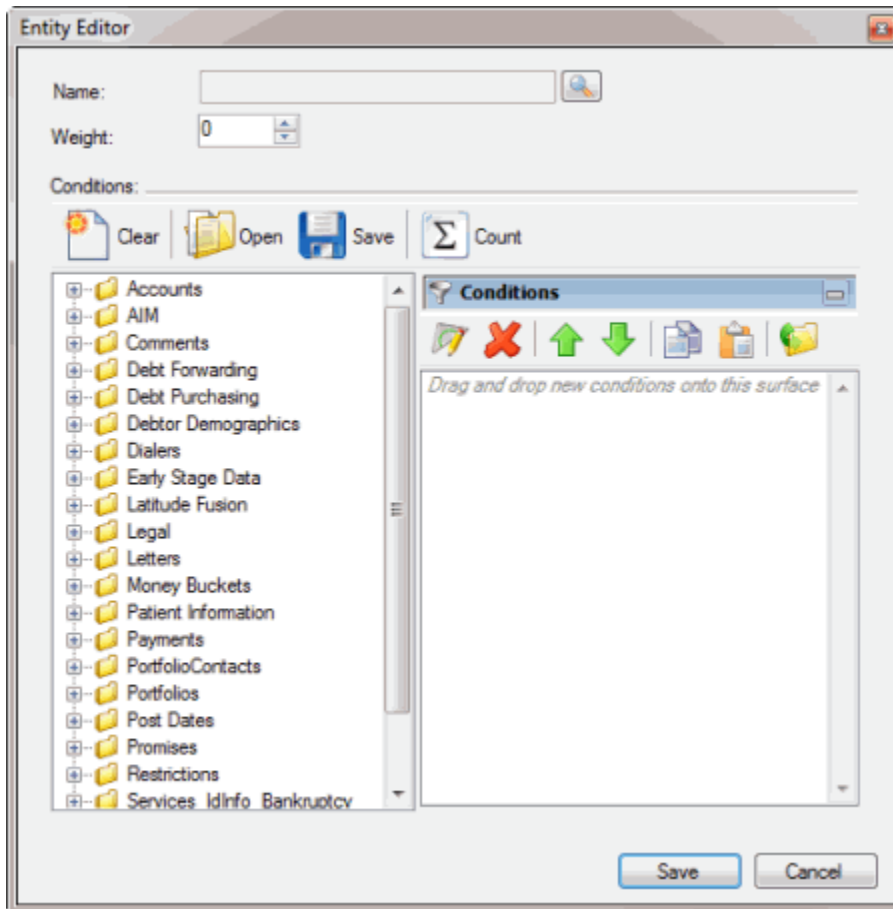
2. On the workflow tab, double-click the Desk Distribution activity. The **Edit Distribution Activity** dialog box appears.



3. In the **Distribution Template** list box, click (**New Template**) and then click the Template icon. The **Template Editor** dialog box appears, with the **General** tab selected.

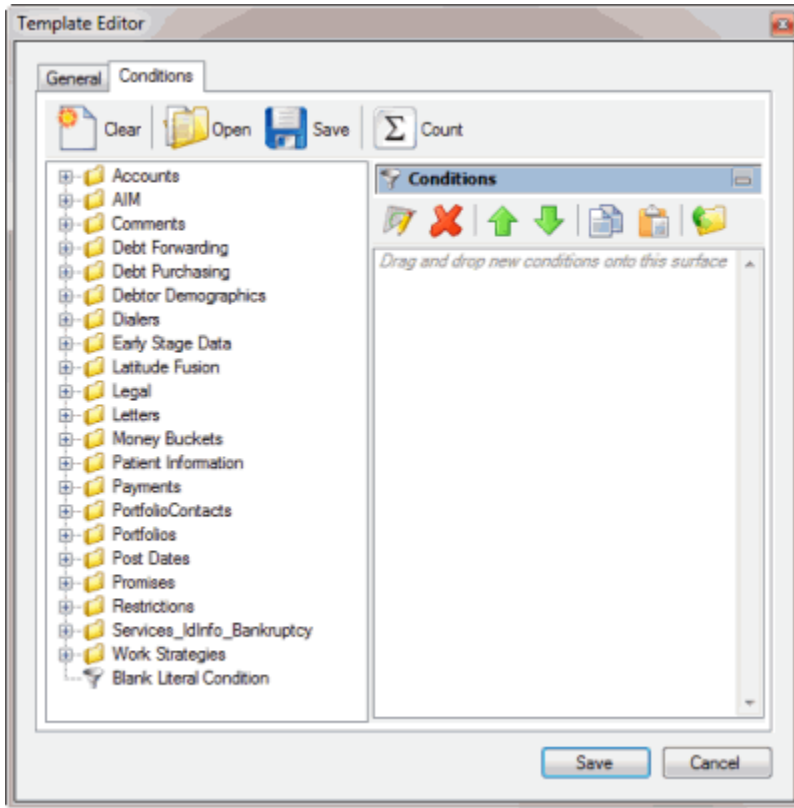


4. Type a name and description for the template.
5. In the **Entities** section, do the following:
 - a. Click **Add**. The **Entity Editor** dialog box appears.



Weight: Number of times more of these accounts to distribute to this desk as opposed to other desks. For example, if the weight is 2, the system distributes 2 times more accounts to this desk than other desks. Weighting is useful when you don't set conditions to limit accounts or the conditions yield the same number of accounts across desks.

- b. Next to the **Name** box, click the Search icon. The **Select Desks** dialog box appears. Click the desk to distribute accounts to and then click **Open**. WorkFlow Designer populates the **Name** box with the specified desk.
 - c. In the **Weight** box, type the multiplication factor for the accounts to distribute to the desk.
 - d. In the **Conditions** section, specify the conditions that define the desks to include in the distribution. The method for creating and managing conditions is the same as for user-defined event conditions. For more information, see the related topics section in [User-defined Event Conditions](#).
 - e. Click **Save**. WorkFlow Designer adds the entity to the **Entities** section of the **Template Editor** dialog box.
6. In the **Template Editor** dialog box, click the **Conditions** tab.



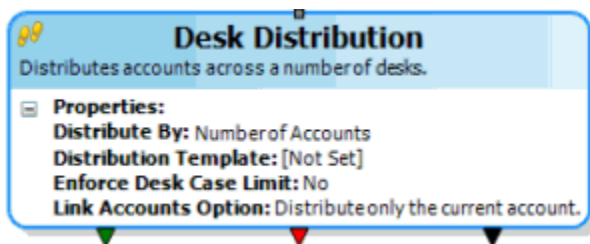
7. Specify conditions that define the accounts to include in the distribution and then click **Save**. WorkFlow Designer populates the **Distribution Template** list box in the **Edit Distribution Activity** dialog box with the name of the new template.
8. Click **Save**. WorkFlow Designer updates the Desk Distribution activity in the workflow.

Create a Linked Accounts Query

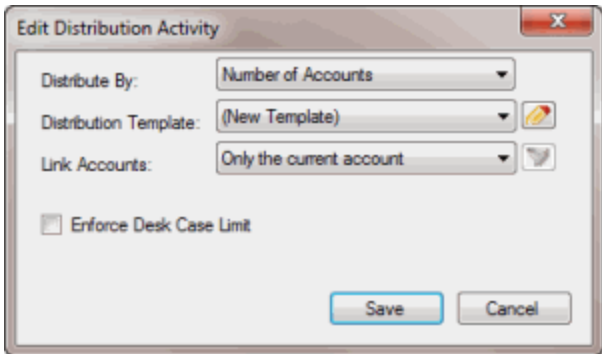
Use the **Linked Accounts Query** dialog box to create a query that defines the linked accounts to include in a distribution.

To create a linked accounts query

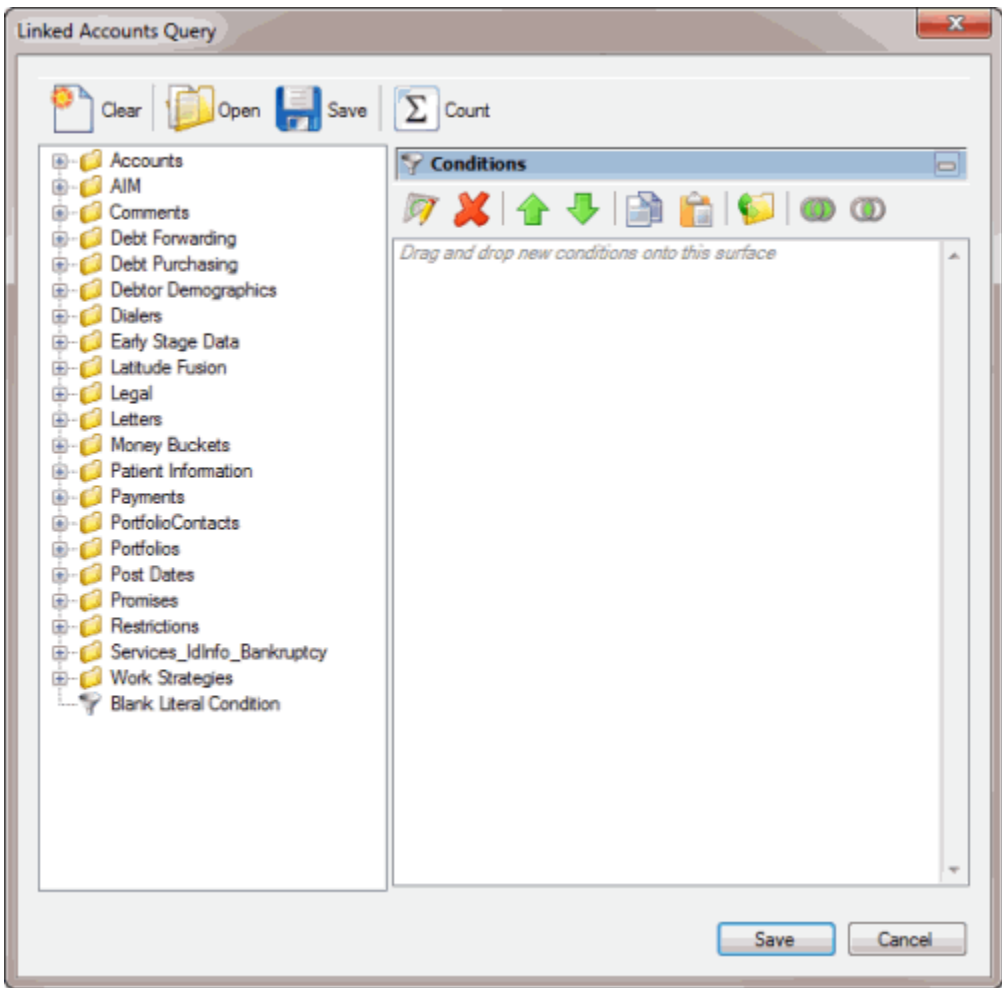
1. Create or open a workflow with a Desk Distribution activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Desk Distribution activity. The **Edit Distribution Activity** dialog box appears.



3. In the **Link Accounts** list box, click **Specific linked accounts** and then click the Link Accounts icon. The **Linked Accounts Query** dialog box appears.



4. Specify conditions to define the linked accounts to include in the distribution and then click **Save**.

Note: The method for creating and managing conditions is the same as for user-defined event conditions. For more information, see the related topics section in [User-defined Event Conditions](#).

5. In the **Edit Distribution Activity** dialog box, click **Save**. WorkFlow Designer updates the Desk Distribution activity in the workflow.

Flow Control Activities

Flow Control Activities

Flow Control activities change the movement of accounts through workflows or events. Most flow control activities behave like action or condition activities.

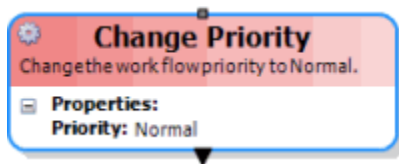
Flow Control activities can send accounts into concurrent workflow activities using a Fork Workflow activity, and resume a single branch in the workflow using a Join Workflow activity. A Flow Control activity can use counters to track the occurrences of activities for an account at a specific point in a workflow, within an entire workflow, or within all workflows.

Change Priority

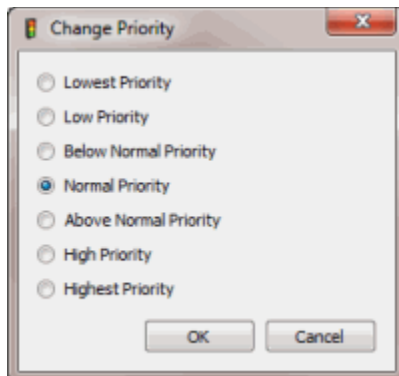
Use the **Change Priority** dialog box to change the processing priority of accounts. This activity causes an account to appear as though the system processed it earlier or later than it actually was.

To modify a Change Priority activity

1. Create or open a workflow with a Change Priority activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Change Priority activity. The **Change Priority** dialog box appears.



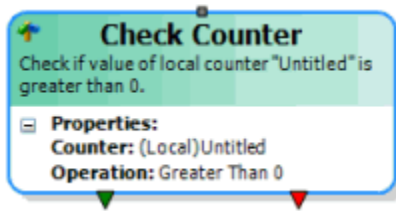
3. Click an option to indicate the priority to assign to the account and then click **OK**. WorkFlow Designer updates the Change Priority activity in the workflow.

Check Counter

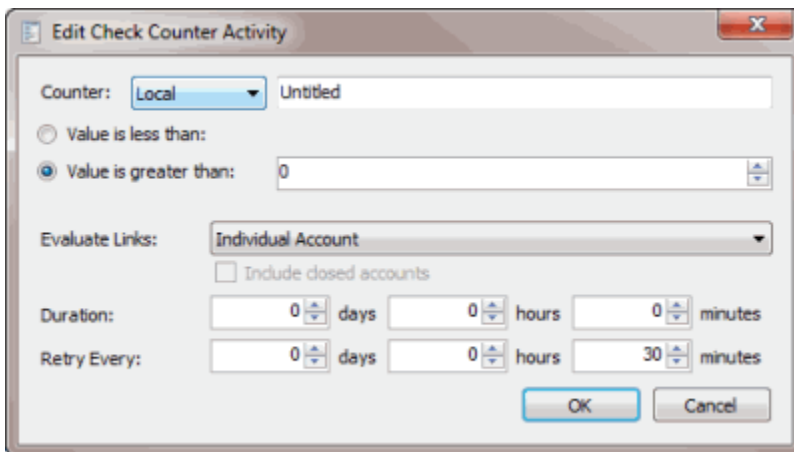
Use the **Edit Check Counter Activity** dialog box to specify the criteria for determining whether a counter is greater than or less than a specific value during a specified time period. You can use this activity to create loops within a workflow, or as a flag to note that something has happened already.

To modify a Check Counter activity

1. Create or open a workflow with a Check Counter activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Check Counter activity. The **Edit Check Counter Activity** dialog box appears.



Counter: Type of counter to use for accounts flowing through this activity.

Local: Local counters exist for the account as it runs through the current instance of a workflow. If the WorkFlow Engine started the account in another workflow instance, or even the same workflow, the instances don't share counters and the WorkFlow Engine can modify and compare them separately. These counters are useful as looping constructs where the WorkFlow Engine sets a counter to a specific value and then increments or decrements the counter until it reaches a certain value.

Work Flow: Workflow counters exist for the account for all instances of execution in the current workflow. If the WorkFlow Engine started the account in another instance of the same workflow, the account shares this value with both instances. These counters are useful as flags within the workflow to indicate that an action occurred (for example), so the WorkFlow Engine doesn't repeat it.

Account: Account counters exist for the account for all instances across all workflows. Any workflow running on the account shares this value. These counters are also useful as flags that the WorkFlow Engine can affect in multiple workflows.

Note: You can create a counter for each counter type, specify a numeric value, and save the counter with a name you choose. There is no limit to the number of counters you can create. Counter names are not case-sensitive. However, two counters with the same name, but of a different type, refer to different counters. For example, a local counter named "mycounter" and a workflow counter named "mycounter" are separate counters, and track different values.

Best practice recommends that you choose unique and descriptive counter names for ease of identification and management.

Name: Name to assign to the counter.

Value is less than: If selected, the WorkFlow Engine evaluates the counter value to determine whether it's less than the specified value.

Value is greater than: If selected, the WorkFlow Engine evaluates the counter value to determine whether it's greater than the specified value.

Value: Number to compare the counter value to.

Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and the account doesn't evaluate as true, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The Workflow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Counter** list box, click the type of counter to use.
4. In the **Name** box, type a name for the counter.
5. Do one of the following:
 - To evaluate whether the counter value is less than the specified value, click **Value is less than**.
 - To evaluate whether the counter value is greater than the specified value, click **Value is greater than**.
6. In the **Value** box, type the value to compare the counter value to.
7. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. Workflow Designer populates the **Custom Group** box in the **Edit Check Counter Activity** dialog box with the specified custom group.
8. To include closed accounts in the evaluation, select **Include closed accounts**.
9. In the **Duration** section, do the following:
 - a. To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - b. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - c. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
10. In the **Retry Every** section, do the following:
 - a. To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - b. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - c. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

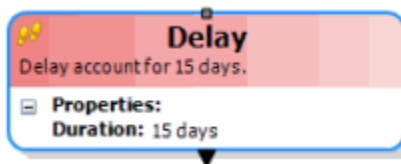
11. Click **OK**. WorkFlow Designer updates the Check Counter activity in the workflow.

Delay

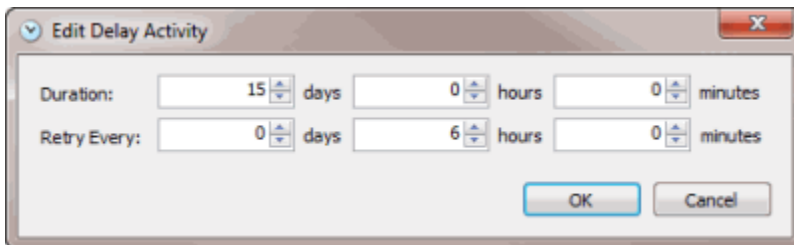
Use the **Edit Delay Activity** dialog box to specify the criteria for holding an account within the current instance of the workflow for the specified time period. No processing occurs on accounts while in this activity.

To modify a Delay activity

1. Create or open a workflow with a Delay activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Delay activity. The **Edit Delay Activity** dialog box appears.



Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and the account doesn't evaluate as true, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Duration** section, do the following:
 - a. To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - b. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.

c. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

4. In the **Retry Every** section, do the following:

. To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.

a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.

b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

5. Click **OK**. WorkFlow Designer updates the Delay activity in the workflow.

Event Raised

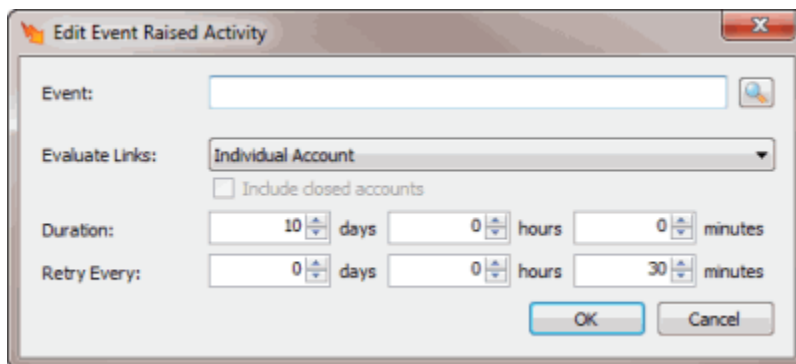
Use the **Edit Event Raised Activity** dialog box to specify the criteria for waiting until the WorkFlow Engine raises an event on an account. Once the WorkFlow Engine raises an event, the account moves to the activity connected to the true (green) endpoint. If the wait period expires and the WorkFlow Engine doesn't raise the event, the account moves to the activity connected to the false (red) endpoint.

To modify an Event Raised activity

1. Create or open a workflow with an Event Raised activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Event Raised activity. The **Edit Event Raised Activity** dialog box appears.



Event: Event to wait to occur.

Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the work flow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and the account doesn't evaluate as true, the account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

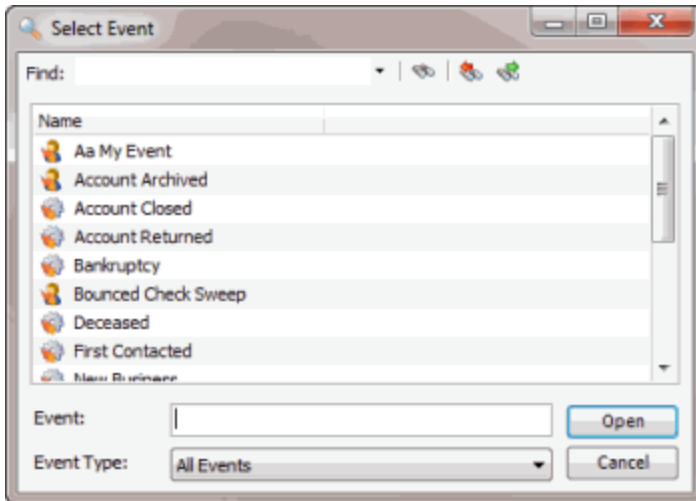
Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. Next to the **Event** box, click the Search icon. The **Select Event** dialog box appears.



4. Click the event and then click **Open**. Workflow Designer populates the **Event** box in the **Edit Event Raised Activity** dialog box with the specified event.
5. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. Workflow Designer populates the **Custom Group** box in the **Edit Event Raised Activity** dialog box with the specified custom group.
6. To include closed accounts in the evaluation, select **Include closed accounts**.
7. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
8. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

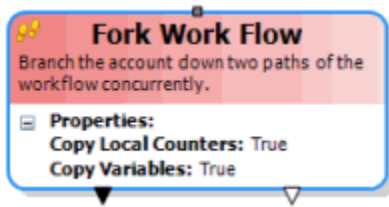
9. Click **OK**. Workflow Designer updates the Event Raised activity in the workflow.

Fork Workflow

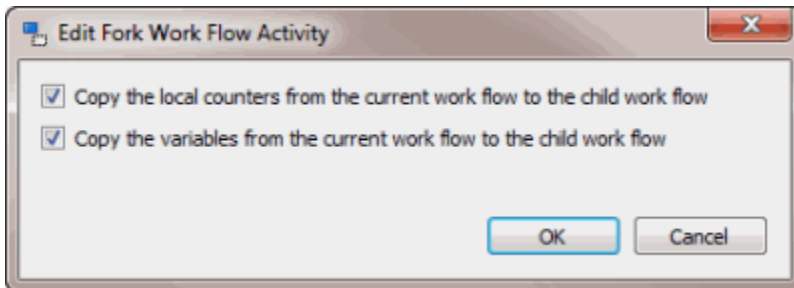
Use the **Fork Work Flow Activity** dialog box to specify the criteria for allowing accounts to follow two paths within the same workflow, concurrently. The parent endpoint is black and the child endpoint is white. The Workflow Engine uses both endpoints and there are no true or false endpoints.

To modify a Fork Work Flow activity

1. Create or open a workflow with a Fork Work Flow activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Fork Work Flow activity. The **Fork Work Flow Activity** dialog box appears.



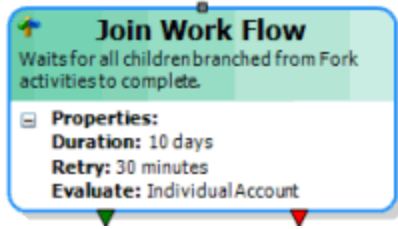
3. To copy the local counters from the current workflow to the child workflow, select the corresponding check box.
4. To copy the variables from the current workflow to the child workflow, select the corresponding check box.
5. Click **OK**. Workflow Designer updates the Fork Work Flow activity in the workflow.

Join Workflow

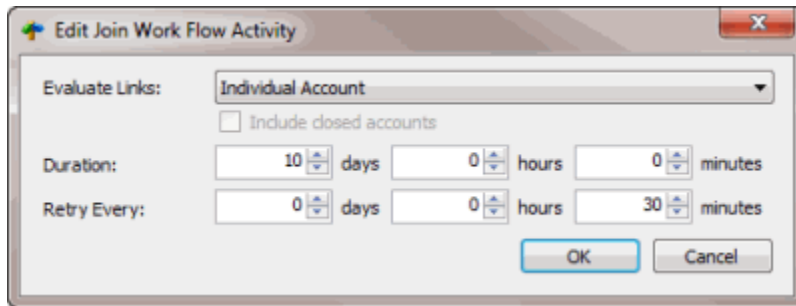
Use the **Edit Join Work Flow Activity** dialog box to specify the criteria for waiting for all workflows branched into fork activities within the same workflow to complete processing before resuming account processing. If the wait period expires before the child processes finish, the account moves to the activity connected to the false (red) endpoint.

To modify a Join Work Flow activity

1. Create or open a workflow with a Join Work Flow activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Join Work Flow activity. The **Edit Join Work Flow Activity** dialog box appears.



Evaluate Links: Indicates whether to evaluate the condition against all linked accounts or just specific accounts.

Individual Account: Evaluates the account that is moving through the workflow only.

Link Driver: Evaluates the link driver account only, even if the account that is moving through the workflow is not the link driver account.

Custom Group: Evaluates all linked accounts within the specified custom customer group.

Customer: Evaluates all linked accounts belonging to the same customer as the account moving through the workflow.

Class of Business: Evaluates all linked accounts belonging to the same class of business as the account moving through the workflow.

Branch: Evaluates all linked accounts belonging to the same branch as the account moving through the workflow.

Department: Evaluates all linked accounts belonging to a desk within the same department as the account moving through the workflow.

Team: Evaluates all linked accounts belonging to a desk within the same team as the account moving through the workflow.

Desk: Evaluates all linked accounts belonging to the same desk as the account moving through the workflow.

All Accounts: Evaluates all linked accounts.

Include closed accounts: If selected, evaluates accounts that fit the link criteria, even if they are in a 998 or 999 queue level (closed status).

Duration: Amount of time for the account to wait in this activity if the account evaluates as false when it enters this activity. If the duration expires and the account doesn't evaluate as true, the

account moves to the activity connected to the false (red) endpoint. If you didn't connect an activity to this endpoint, the account stops processing.

Days: Number of days to wait in this activity.

Hours: Number of hours to wait in this activity.

Minutes: Number of minutes to wait in this activity.

Retry Every: Frequency in which to reevaluate the account to determine whether it meets the condition. The WorkFlow Engine reevaluates the account as many times as the retry setting fits within the duration.

Days: Number of days to wait before re-evaluating.

Hours: Number of hours to wait before re-evaluating.

Minutes: Number of minutes to wait before re-evaluating.

3. In the **Evaluate Links** list box, click the evaluation method for linked accounts. If you selected **Custom Group**, do the following:
 - a. Click the Search icon next to the **Evaluate Links** list box. The **Select Custom Customer Group** dialog box appears.
 - b. Click the custom group and then click **Open**. WorkFlow Designer populates the **Custom Group** box in the **Edit Join Work Flow Activity** dialog box with the specified custom group.
4. To include closed accounts in the evaluation, select **Include closed accounts**.
5. In the **Duration** section, do the following:
 - . To wait a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To wait a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To wait a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.
6. In the **Retry Every** section, do the following:
 - . To retry for a specific number of days, in the **days** box, type or use the arrows to specify the number of days to wait.
 - a. To retry for a specific number of hours, in the **hours** box, type or use the arrows to specify the number of hours to wait.
 - b. To retry for a specific number of minutes, in the **minutes** box, type or use the arrows to specify the number of minutes to wait.

Note: You can use a combination of days, hours, and minutes for the duration and retry settings.

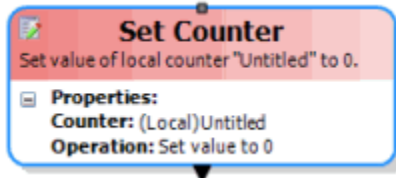
7. Click **OK**. WorkFlow Designer updates the Join Work Flow activity in the workflow.

Modify Counter

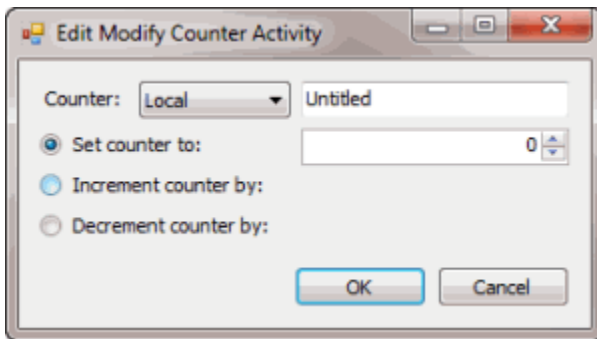
Use the **Edit Modify Counter Activity** dialog box to specify the criteria for modifying a counter.

To modify a Set Counter activity

1. Create or open a workflow with a Set Counter activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Set Counter activity. The **Edit Modify Counter Activity** dialog box appears.



Counter: Type of counter to use for accounts flowing through this activity.

Local: Local counters exist for the account as it runs through the current instance of a workflow. If the WorkFlow Engine started an account in another workflow instance, or even the same workflow, the instances don't share counters and the WorkFlow Engine can modify and compare them separately. These counters are useful as looping constructs where the WorkFlow Engine sets a counter to a specific value and then increments or decrements the counter until it reaches a certain value.

Work Flow: Workflow counters exist for the account for all instances of execution in the current workflow. If the WorkFlow Engine started the account in another instance of the same workflow, the account shares this value with both instances. These counters are useful as flags within the workflow to indicate that an action occurred (for example), so the WorkFlow Engine doesn't repeat it.

Account: Account counters exist for the account for all instances across all workflows. Any workflow running on the account shares this value. These counters are also useful as flags that the WorkFlow Engine can affect in multiple workflows.

Note: You can create a counter for each counter type, specify a numeric value, and save the counter with a name you choose. There is no limit to the number of counters you can create. Counter names are not case-sensitive. However, two counters with the same name, but of a different type, refer to different counters. For example, a local counter named "mycounter" and a workflow counter named "mycounter" are separate counters, and track different values.

Best practice recommends that you choose unique and descriptive counter names for ease of identification and management.

Name: Name to assign to the counter.

Set counter to: If selected, the WorkFlow Engine sets the counter value to the specified value.

Value: Number to set the counter value to, or increase or decrease the counter value by, depending on the option selected.

Increment counter by: If selected, the WorkFlow Engine adds the specified number to the counter.

Decrement counter by: If selected, the WorkFlow Engine subtracts the specified number from the counter.

3. In the **Counter** list box, click the type of counter to use.
4. In the **Name** box, type a name for the counter.
5. Do one of the following:
 - To set the counter value to the specified value, click **Set counter to** and then, in the **Value** box, type the number to set the counter value to.
 - To increase the counter value by the specified value, click **Increment counter by** and then, in the **Value** box, type the number to increase the counter value by.
 - To decrease the counter value by the specified value, click **Decrement counter by** and then, in the **Value** box, type the number to decrease the counter value by.
6. Click **OK**. WorkFlow Designer updates the Set Counter activity in the workflow.

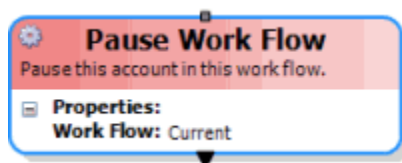
Note: If you chose to set the counter to a specific value, the activity name remains as Set Counter. If you chose to increase the counter by a specific value, the WorkFlow Designer renames the activity to Increment Counter. If you chose to decrease the counter by a specific value, the WorkFlow Designer renames the activity to Decrement Counter.

Pause Workflow

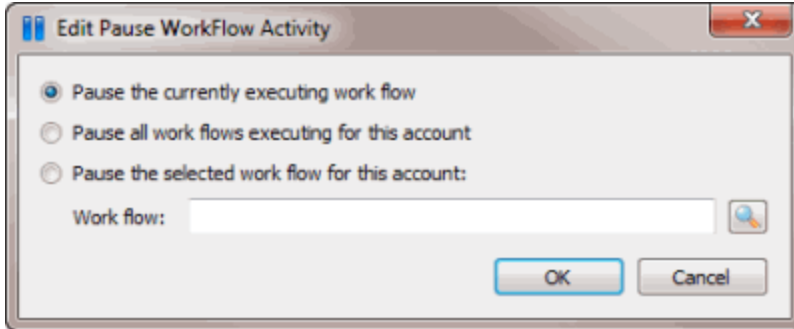
Use the **Edit Pause WorkFlow Activity** dialog box to pause a workflow. To restart the workflow, the Resume activity calls the workflow from another workflow. For example, you can use this activity to pause a desk-moving workflow until an account-scrubbing workflow completes.

To modify a Pause Work Flow activity

1. Create or open a workflow with a Pause Work Flow activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Pause Work Flow activity. The **Edit Pause WorkFlow Activity** dialog box appears.



3. Do one of the following:
 - To pause the workflow running currently, click **Pause the currently executing work flow**.
 - To pause all workflows running for this account, click **Pause all work flows executing for this account**.
 - To pause a specific workflow for this account, click **Pause the selected work flow for this account**. Next to the **Work flow** box, click the Search icon. In the **Select WorkFlow** dialog box, click the workflow and then click **Open**.
4. In the **Edit Pause WorkFlow Activity** dialog box, click **OK**. Workflow Designer updates the Pause Work Flow activity in the workflow.

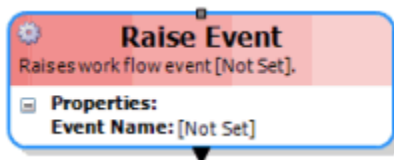
Raise Event

Use the **Edit Raise Event Activity** dialog box to specify the event to occur on accounts that flow through this activity. The Raise Event activity adds an event to the event queue for the account. Raising an event on an account does not change the conditions on the account to match the requirements of the event. However, accounts enter the event with the parameters set at the even level (for example, priority level, recurrence setting).

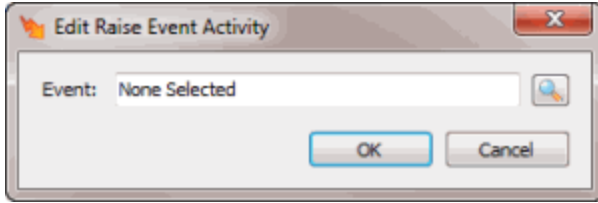
There is one difference between the Raise Event activity and the Start Work Flow activity. With the Raise Event activity, accounts use the event settings (delay, priority, action, and re-entrance) in the attached workflow. With the Start Work Flow activity, the WorkFlow Engine ignores the event settings and begins processing accounts at the first activity.

To modify a Raise Event activity

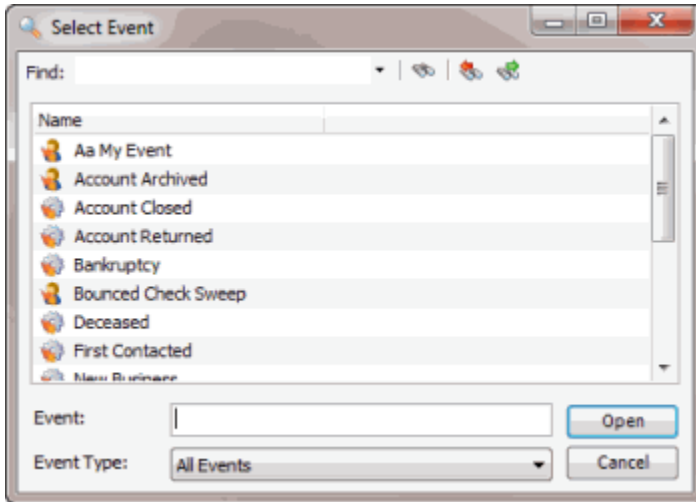
1. Create or open a workflow with a Raise Event activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Raise Event activity. The **Edit Raise Event Activity** dialog box appears.



3. Next to the **Event** box, click the Search icon. The **Select Event** dialog box appears.



4. Click the event and then click **Open**. WorkFlow Designer populates the **Event** box in the **Edit Raise Event Activity** dialog box with the specified event.
5. Click **OK**. WorkFlow Designer updates the Raise Event activity in the workflow.

Release Parent

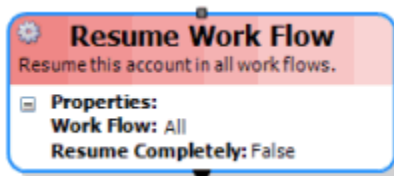
Use the Release Parent activity to release an account so it can continue processing in the current workflow. You can use this activity if you cleared the **Allow started work flow to execute concurrently with current work flow** check box in the Start Work Flow activity.

Resume Workflow

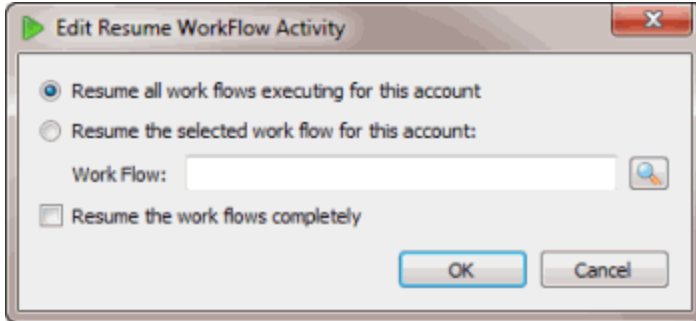
Use the **Edit Resume WorkFlow Activity** dialog box to resume a paused workflow.

To modify a Resume Work Flow activity

1. Create or open a workflow with a Resume Work Flow activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Resume Work Flow activity. The **Edit Resume WorkFlow Activity** dialog box appears.



3. Do one of the following:
 - To resume all workflows running for this account, click **Resume all work flows executing for this account**.
 - To resume a specific workflow for this account, click **Resume the selected work flow for this account**. Next to the **Work flow** box, click the Search icon. In the **Select Workflow** dialog box, click the workflow and then click **Open**.
4. In the **Edit Resume Workflow Activity** dialog box, to resume every instance of a paused workflow, select **Resume the work flows completely**. For example, use this option when other Pause activities in other workflows pause a workflow and you want to resume those workflows also.
5. Click **OK**. Workflow Designer updates the Resume Work Flow activity in the workflow.

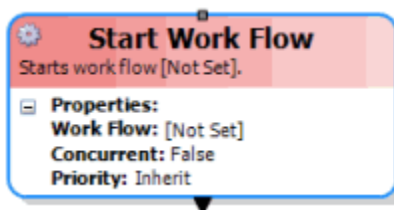
Start Workflow

Use the **Edit Start Workflow Activity** dialog box to start a workflow within a workflow.

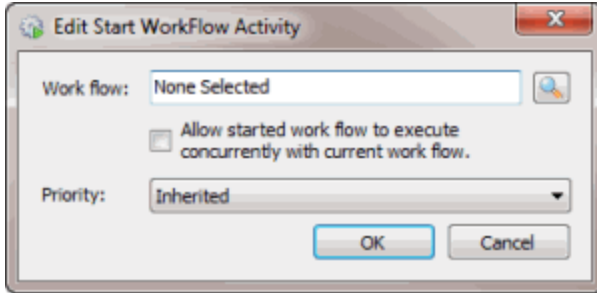
There is one difference between the Start Work Flow activity and the Raise Event activity. With the Start Work Flow activity, the Workflow Engine ignores the event settings and begins processing accounts at the first activity. With the Raise Event activity, accounts use the event settings (delay, priority, action, and re-entrance) in the attached workflow.

To modify a Start Work Flow activity

1. Create or open a workflow with a Start Work Flow activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



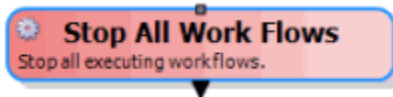
2. On the workflow tab, double-click the Start Work Flow activity. The **Edit Start Workflow Activity** dialog box appears.



3. Next to the **Work flow** box, click the Search icon. The **Select WorkFlow** dialog box appears.
4. Click the workflow and then click **Open**. WorkFlow Designer populates the **Work flow** box in the **Edit Start WorkFlow Activity** dialog box with the specified workflow.
5. To allow a started workflow to run concurrently with this workflow, select **Allow started work flow to execute concurrently with current work flow**. If cleared, the current workflow pauses and waits for the started workflow to finish before resuming.
6. In the **Priority** list box, click the priority to assign to this activity.
7. Click **OK**. WorkFlow Designer updates the Start Work Flow activity in the workflow.

Stop All Workflows

Use the Stop All Work Flows activity to stop all workflows that are running for accounts this activity is processing. For example, if an account qualifies for the Deceased event, the workflow attached to the Deceased event can call this activity and stop all other workflows for this account.



Stop Workflow

Use the Stop Work Flow activity as a marker to indicate that the workflow has stopped at one or more points in the workflow. This activity doesn't process anything. Workflow activities stop whenever one of the following occurs:

- Accounts processing in a workflow reach the stop activity.
- Accounts reach an endpoint not connected to an activity.



Counter Usage Examples

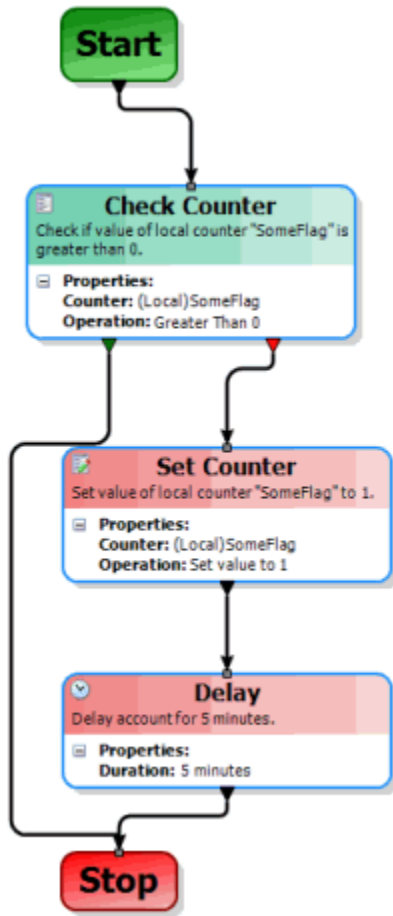
The following examples show how you can use Check Counter and Set Counter activities in a workflow.

Check Counter activity

This example shows counter activities used within a workflow to:

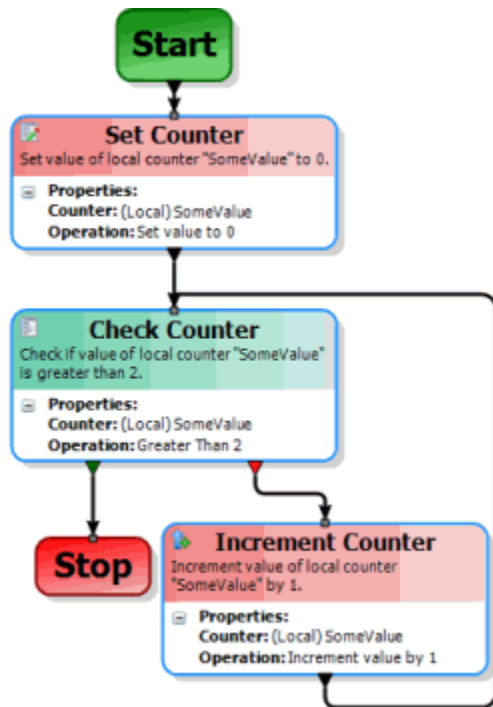
1. Check a value.
2. If the value is not greater than zero, set the value to 1.

3. Pause before ending the workflow.



Set Counter activity

This example shows how to set up a counter to run through a loop of activities a specific number of times.



Process Orchestration Activities

Process Orchestration Activities

Process Orchestration activities change the movement of accounts through workflows or events. Most flow control activities behave like action or condition activities.

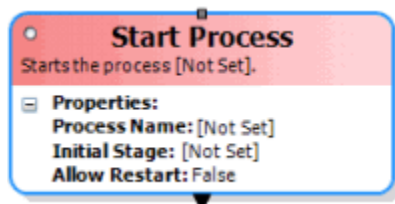
Flow Control activities can send accounts into concurrent workflow activities using a Fork Workflow activity, and resume a single branch in the workflow using a Join Workflow activity. A Flow Control activity can use counters to track the occurrences of activities for an account at a specific point in a workflow, within an entire workflow, or within all workflows.

Start Process

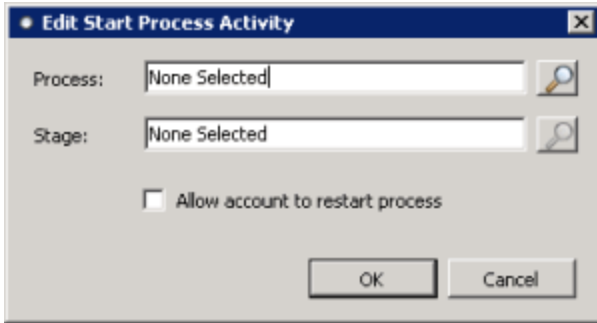
Use the **Edit Start Process Activity** dialog box to start an account in a process. The process starts at the default stage within the process; however, you can specify the stage at which to start the process.

To modify a Start Process activity

1. Create or open a workflow with a Start Process activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Start Process activity. The **Edit Start Process Activity** dialog box appears.



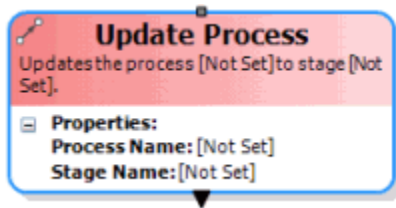
3. Next to the **Process** box, click the Search icon. The **Select Process** dialog box appears.
4. Click the process and then click **Open**. WorkFlow Designer populates the **Process** box in the **Edit Start Process Activity** dialog box with the specified process.
5. To start the process at a specific stage, next to the **Stage** box, click the Search icon. The **Select Stage** dialog box appears.
6. Click the stage and then click **Open**. WorkFlow Designer populates the **Stage** box in the **Edit Start Process Activity** dialog box with the specified stage.
7. To allow an account to restart this process, select **Allow account to restart process**.
8. Click **OK**. WorkFlow Designer updates the Start Process activity in the workflow.

Update Process

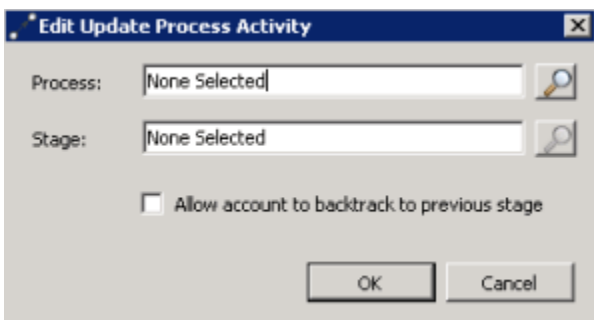
Use the **Edit Update Process Activity** dialog box to move an account to a specific stage within a process.

To modify an Update Process activity

1. Create or open a workflow with an Update Process activity. For more information, see [Create a Workflow](#) or [Modify a Workflow](#).



2. On the workflow tab, double-click the Update Process activity. The **Edit Update Process Activity** dialog box appears.




3. Next to the **Process** box, click the Search icon. The **Select Process** dialog box appears.
4. Click the process and then click **Open**. WorkFlow Designer populates the **Process** box in the **Edit Update Process Activity** dialog box with the specified process.
5. Next to the **Stage** box, click the Search icon. The **Select Stage** dialog box appears.
6. Click the stage and then click **Open**. WorkFlow Designer populates the **Stage** box in the **Update Start Process Activity** dialog box with the specified stage.
7. To allow an account to return to the previous stage in the process, select **Allow account to restart process**.
8. Click **OK**. WorkFlow Designer updates the Update Process activity in the workflow.

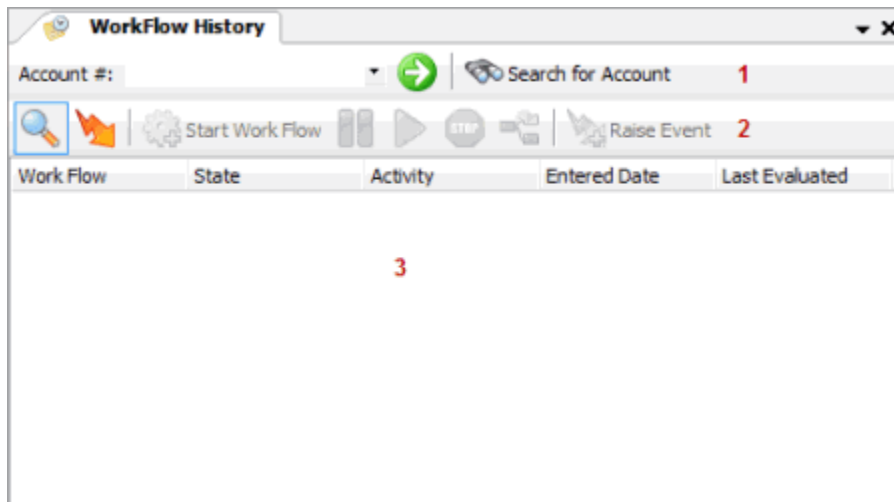
Workflow History

Workflow History


Use the **WorkFlow History** tab to view workflow and event history for an account. You can view the results of tests you run to evaluate workflows and events. For example, you can start a workflow, raise events on accounts, and review the results on this tab.








To open the WorkFlow History tab

From the **Window** toolbar, click the Workflow History icon . The **WorkFlow History** tab appears.



1. **Search:** Allows you to type an account number or search for an account for which to view workflow history.
2. **Toolbar:** Displays available shortcuts for the tab.

Icon	Description
	Displays the workflows that are running or have run for the account.


Icon	Description
	Displays the events raised on the account.
	Starts a workflow for the account.
	Pauses a workflow for the account.
	Resumes a workflow for the account.
	Stops a workflow for the account.
	Releases a workflow from waiting on a child workflow on the account.
	Raises an event on the account.

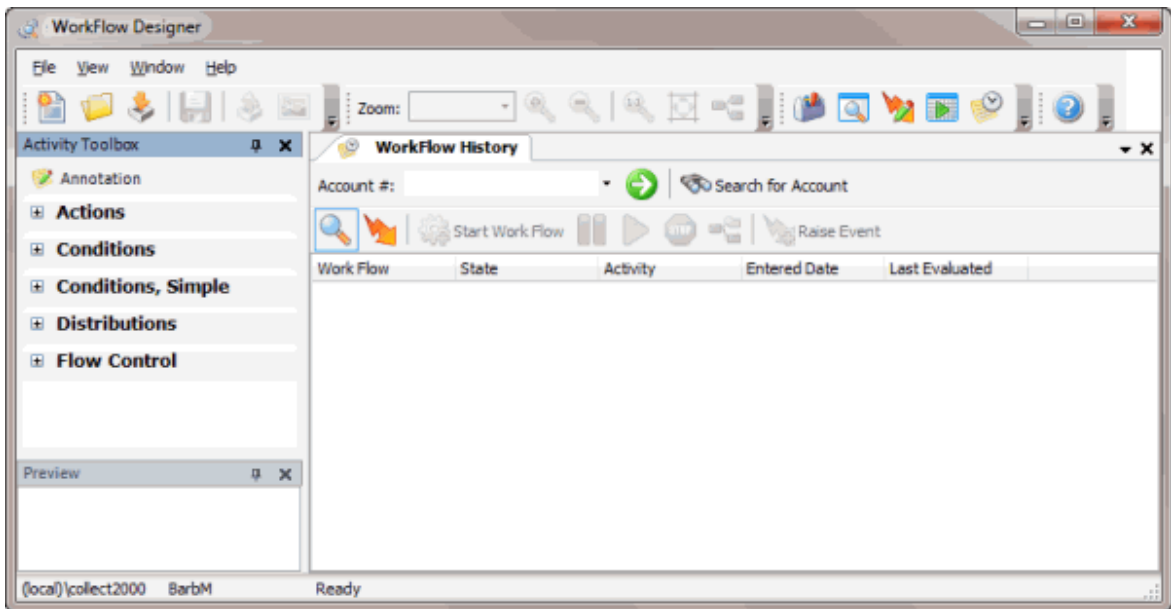
3. **Detail page:** Displays the workflows and events that the WorkFlow Engine ran on the account, and the workflows and events a user started manually but the WorkFlow Engine hasn't run yet.

Search for an Account in Workflow History


Use the **WorkFlow History** tab to search for an account and view its workflow history.

To search for an account in workflow history

1. From the **Window** toolbar, click the Workflow History icon . The **WorkFlow History** tab appears.



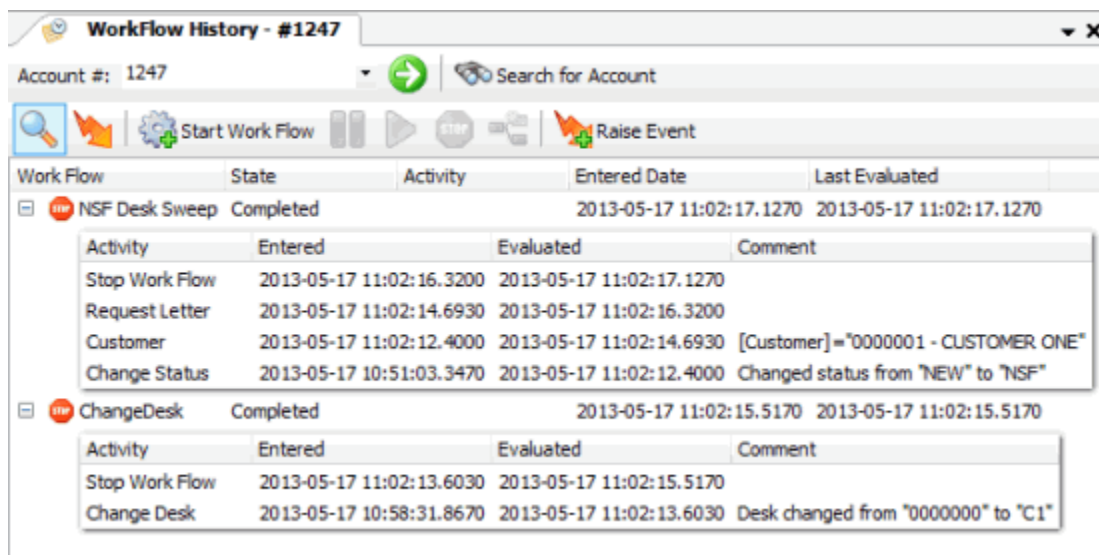
2. Do one of the following:

- If you know the account number, in the **Account #** box, type the account number and then click the Go icon .

- To search for an account, do the following:

- Click **Search for Account**. The **Search - Search for Account** window appears.
- Type search criteria into one or more boxes. For fewer results, provide more information. For more results, provide less information.
- Click **Search**. The results display on the **Search Results** tab.
- Double-click the account.


All workflows for the account appear on the **WorkFlow History** tab.

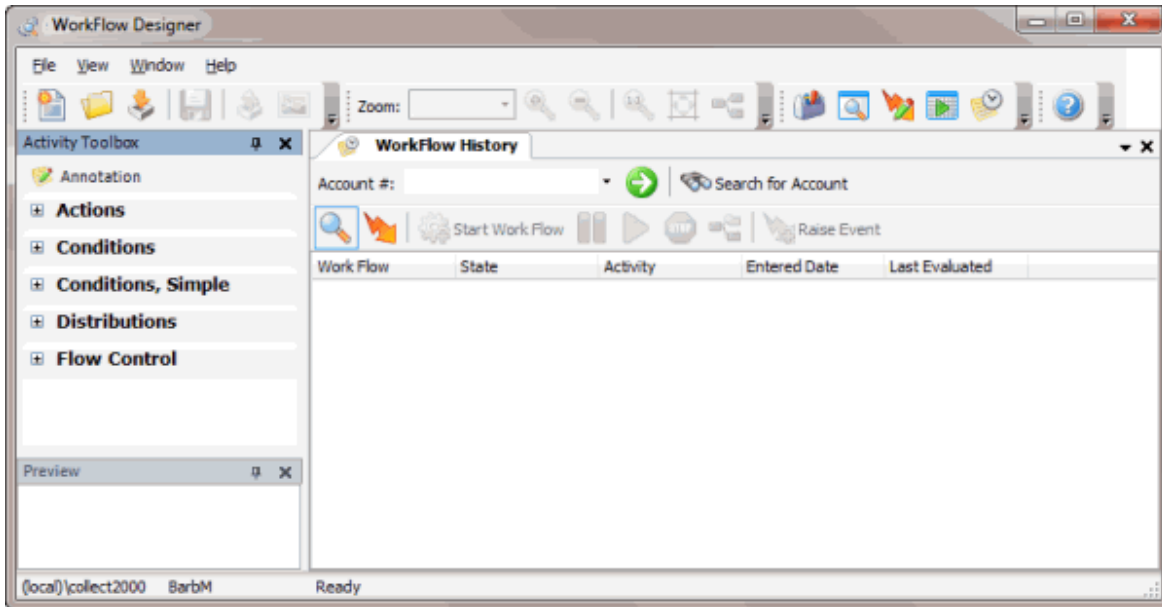




View Raised Events for an Account

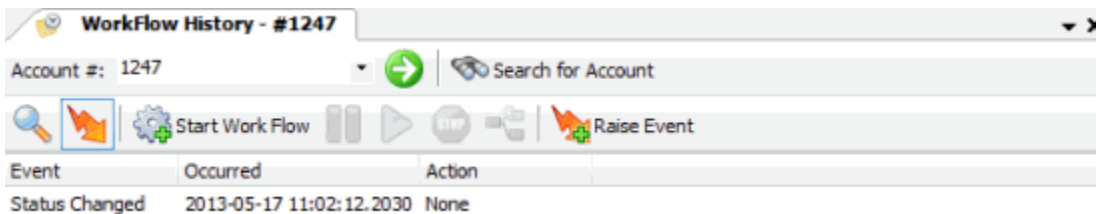
Use the **WorkFlow History** tab to view raised events for an account.

To view raised events for an account

- From the **Window** toolbar, click the Workflow History icon . The **WorkFlow History** tab appears.



2. Do one of the following:
 - If you know the account number, in the **Account #** box, type the account number and then click the Go icon .
 - To search for an account, do the following:
 - a. Click **Search for Account**. The **Search - Search for Account** window appears.
 - b. Type search criteria into one or more boxes. For fewer results, provide more information. For more results, provide less information.
 - c. Click **Search**. The results display on the **Search Results** tab.
 - d. Double-click the account.
3. In the toolbar on the tab, click the Events Raised icon .




Start a Workflow on an Account

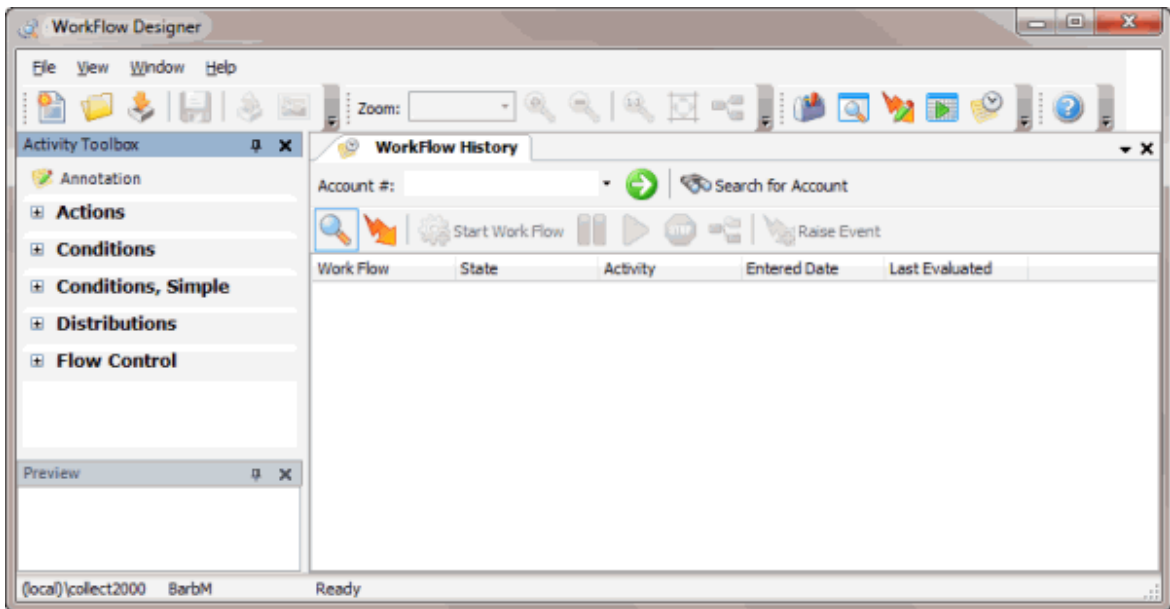
Use the **WorkFlow History** tab to start a workflow on an account. Once a workflow starts, you can:



- Pause the workflow.
- Resume the workflow after it's paused.
- Release the parent workflow if it's waiting on a child workflow to finish processing.

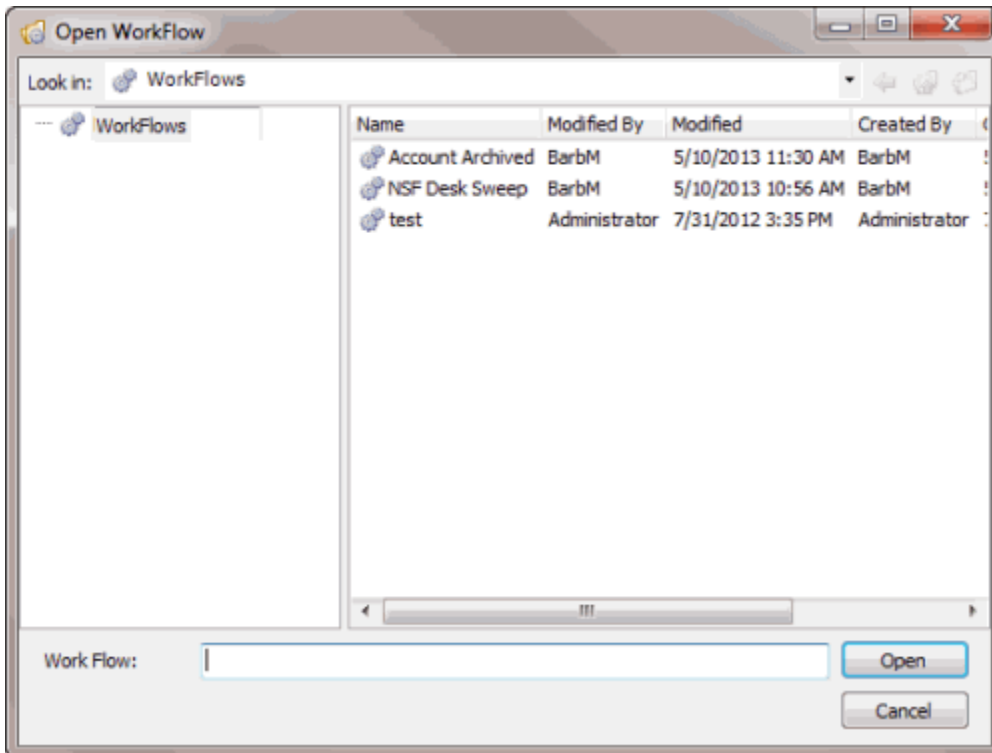
- Stop the workflow.

To start a workflow on an account

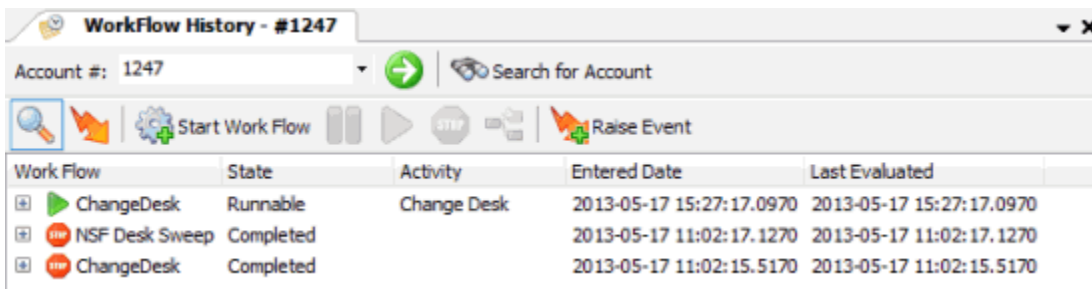
1. From the **Window** toolbar, click the Workflow History icon . The **WorkFlow History** tab appears.



2. Do one of the following:
 - If you know the account number, in the **Account #** box, type the account number and then click the Go icon .
 - To search for an account, do the following:
 - a. Click **Search for Account**. The **Search - Search for Account** window appears.
 - b. Type search criteria into one or more boxes. For fewer results, provide more information. For more results, provide less information.
 - c. Click **Search**. The results display on the **Search Results** tab.
 - d. Double-click the account.
3. In the toolbar on the tab, click the Start Workflow icon . The **Open WorkFlow** dialog box appears.



- Click the workflow and then click **Open**. The workflow appears on the **Workflow** page of the **WorkFlow History** tab in a "Runnable" state.



- Open the "C:\Program Files (x86)\Interactive Intelligence\Interaction Collector\bin" folder and double-click **WorkFlow.Engine**. The WorkFlow Engine begins processing the workflows that are in a "runnable" state.

```

erEvents]"
2013-05-17 15:30:34,751 DEBUG: Command affected 0 rows
2013-05-17 15:30:34,761 DEBUG: END ProcessUserDefinedEventsTask::Execute
2013-05-17 15:30:34,761 DEBUG: END Program::ProcessUserEvents
2013-05-17 15:30:34,761 DEBUG: BEGIN Program::ProcessEventQueue
2013-05-17 15:30:34,761 DEBUG: BEGIN ProcessEventQueueTask::Execute
2013-05-17 15:30:34,761 INFO : Processing event queue
2013-05-17 15:30:34,761 DEBUG: Opening connection to database BARBARAMARTINPC\Co
llect2000
2013-05-17 15:30:34,761 DEBUG: Executing procedure "[dbo].[WorkFlow_ProcessEvent
s]"
2013-05-17 15:30:34,761 DEBUG: END ProcessEventQueueTask::Execute
2013-05-17 15:30:34,761 DEBUG: END Program::ProcessEventQueue
2013-05-17 15:30:34,761 DEBUG: BEGIN Program::ProcessActivity
2013-05-17 15:30:35,121 DEBUG: BEGIN ProcessWorkflowActivityTask::Execute
2013-05-17 15:30:35,211 DEBUG: Opening connection to database BARBARAMARTINPC\Co
llect2000
2013-05-17 15:30:35,271 DEBUG: Executing procedure "[dbo].[WorkFlow_GetNextActivi
ty]" [Parameters: @LastActivityID = 'ea687a55-8d84-49a3-aa6f-6de048a357d7' ]
2013-05-17 15:30:35,311 DEBUG: Command returned reader with rows
2013-05-17 15:30:35,311 INFO : Loading Activity: bf58c1e6-b26b-4a1d-8b19-57fb0a0
ca62c Stop Work Flow Latitude.WorkFlow.Activities.FlowControl.StopWorkflowActivi
ty, Latitude.WorkFlow.Activities.FlowControl, Version=0.0.0.0, Culture=neutral,
PublicKeyToken=null
    
```

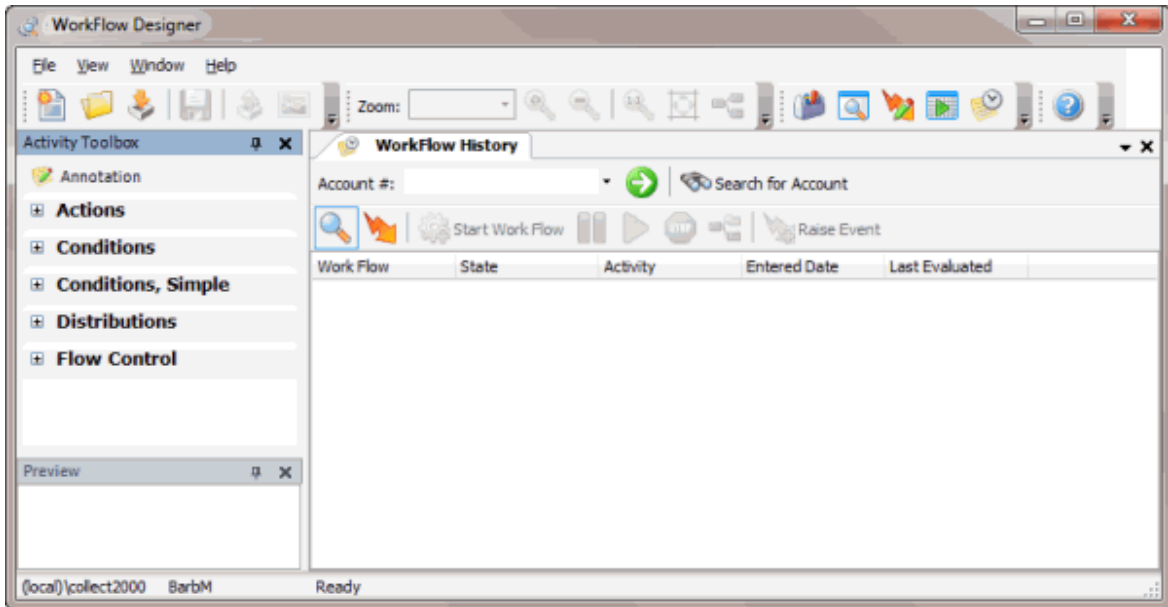
6. When processing completes, on the **Workflow** page, the workflow state changes to "Completed." Expand the workflow entry to view its detail.
7. Do the following as needed:
 - To pause a workflow, click the workflow and then click the Pause icon . The workflow state changes to "Paused" and processing halts.
 - To resume a paused workflow, click the workflow and then click the Resume icon . The workflow state changes to "Runnable"
 - To release a workflow that's waiting on a child workflow to finish processing, click the workflow and then click the Release icon . The workflow is release and processing continues.
 - To stop a workflow from processing, click the workflow and then click the Stop icon . In the confirmation dialog box, click **Yes**. The WorkFlow Engine stops the workflow and deletes it from the **Workflow** page of the **Workflow History** tab.



Pause a Workflow for an Account

Use the **WorkFlow History** tab to pause a workflow that started on an account.

To pause a workflow for an account

1. From the **Window** toolbar, click the Workflow History icon . The **WorkFlow History** tab appears.




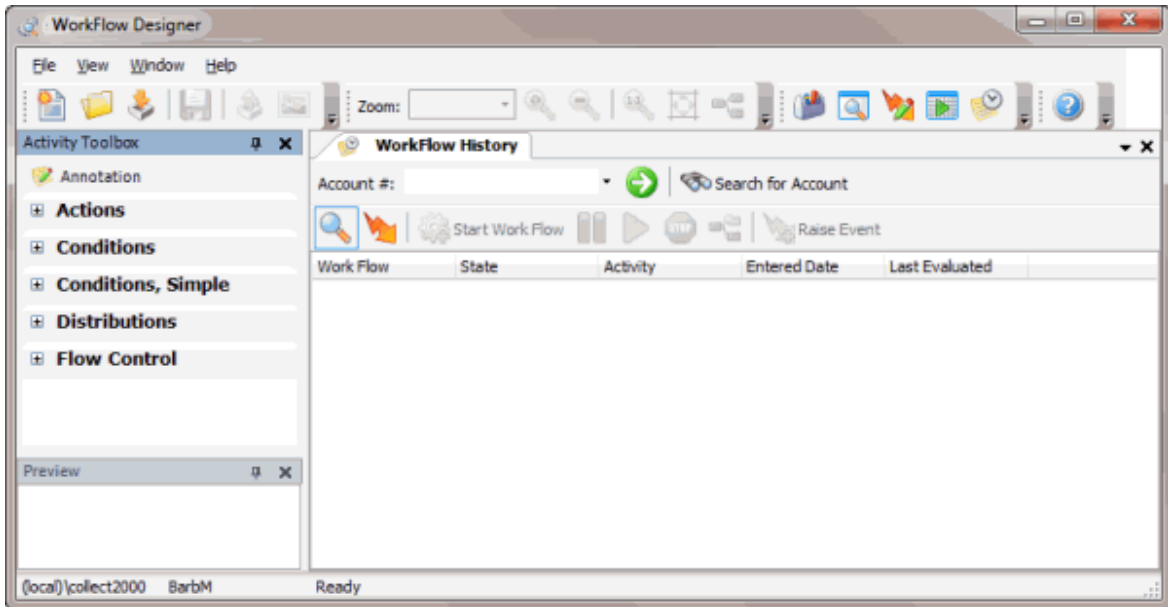
2. Do one of the following:
 - If you know the account number, in the **Account #** box, type the account number and then click the Go icon .
 - To search for an account, do the following:
 - a. Click **Search for Account**. The **Search - Search for Account** window appears.
 - b. Type search criteria into one or more boxes. For fewer results, provide more information. For more results, provide less information.
 - c. Click **Search**. The results display on the **Search Results** tab.
 - d. Double-click the account.
3. Click the workflow to pause and then, in the toolbar on the tab, click the Pause icon . The workflow state changes to "Paused" and the workflow stops processing.



Resume a Workflow for an Account

Use the **Workflow History** tab to resume a paused workflow for an account.

To resume a workflow for an account

1. From the **Window** toolbar, click the Workflow History icon . The **Workflow History** tab appears.




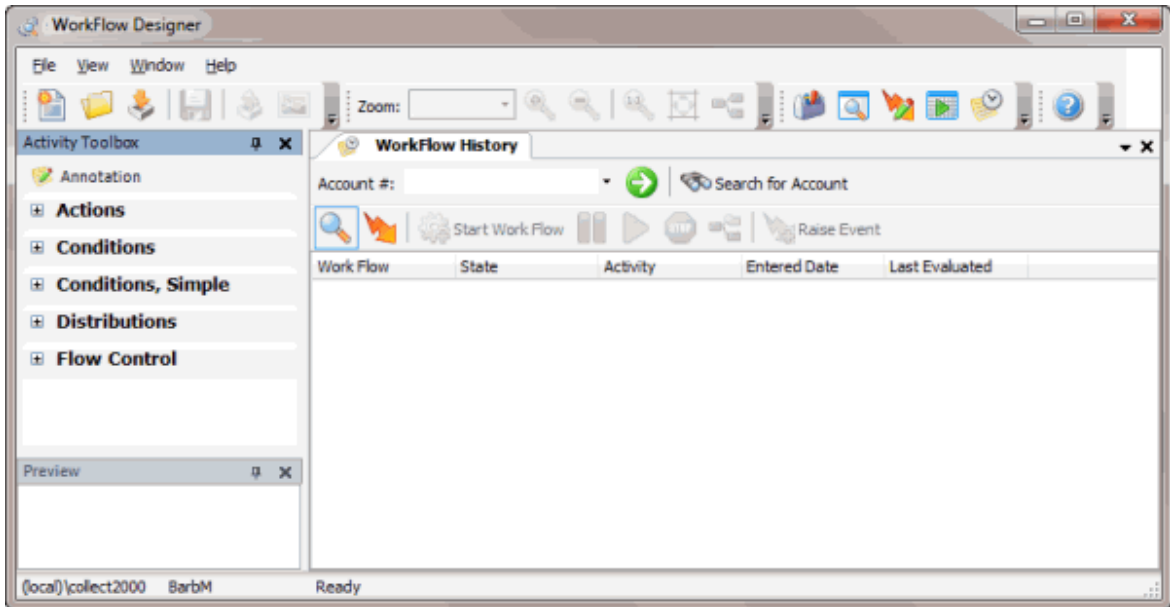
2. Do one of the following:
 - If you know the account number, in the **Account #** box, type the account number and then click the Go icon .
 - To search for an account, do the following:
 - a. Click **Search for Account**. The **Search - Search for Account** window appears.
 - b. Type search criteria into one or more boxes. For fewer results, provide more information. For more results, provide less information.
 - c. Click **Search**. The results display on the **Search Results** tab.
 - d. Double-click the account.
3. Click the workflow to resume and then, in the toolbar on the tab, click the resume icon . The workflow state changes to "Runnable" and the workflow resumes processing.



Release a Workflow for an Account

Use the **WorkFlow History** tab to release a workflow that's waiting on a child workflow to finish processing.

To release a workflow for an account

1. From the **Window** toolbar, click the Workflow History icon . The **WorkFlow History** tab appears.




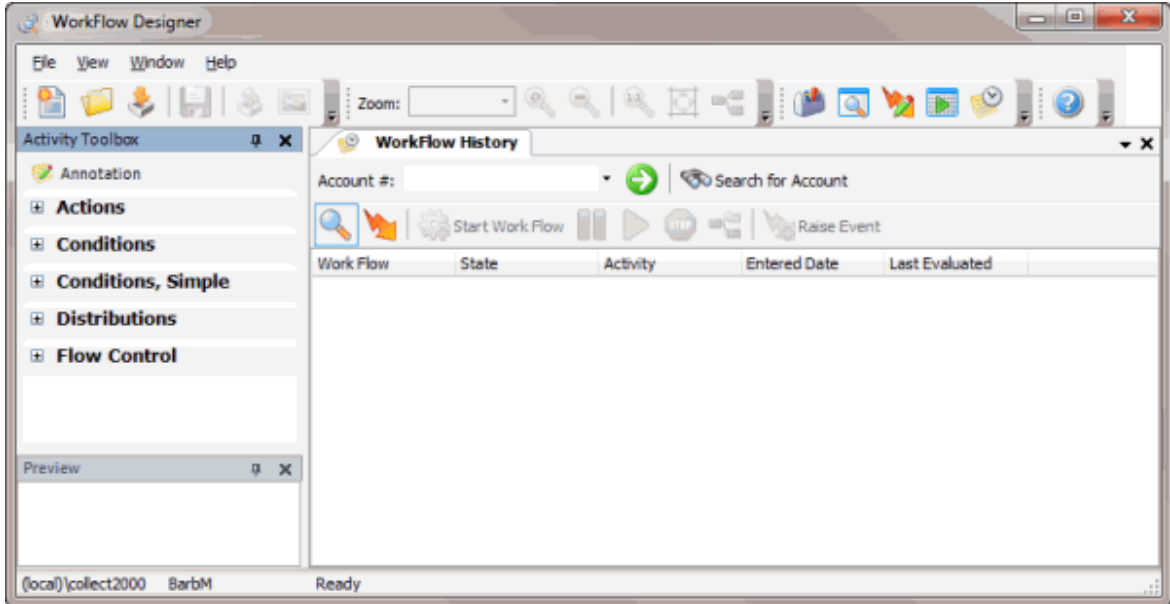
2. Do one of the following:
 - If you know the account number, in the **Account #** box, type the account number and then click the Go icon .
 - To search for an account, do the following:
 - a. Click **Search for Account**. The **Search - Search for Account** window appears.
 - b. Type search criteria into one or more boxes. For fewer results, provide more information. For more results, provide less information.
 - c. Click **Search**. The results display on the **Search Results** tab.
 - d. Double-click the account.
3. Click the workflow to release and then, in the toolbar on the tab, click the Release icon . The WorkFlow Engine releases the workflow and resumes processing.



Stop a Workflow for an Account

Use the **WorkFlow History** tab to stop a workflow that started on an account. You cannot resume a stopped workflow. If you want the ability to resume a workflow, pause it instead of stopping it.

To stop a workflow for an account

1. From the **Window** toolbar, click the Workflow History icon . The **WorkFlow History** tab appears.




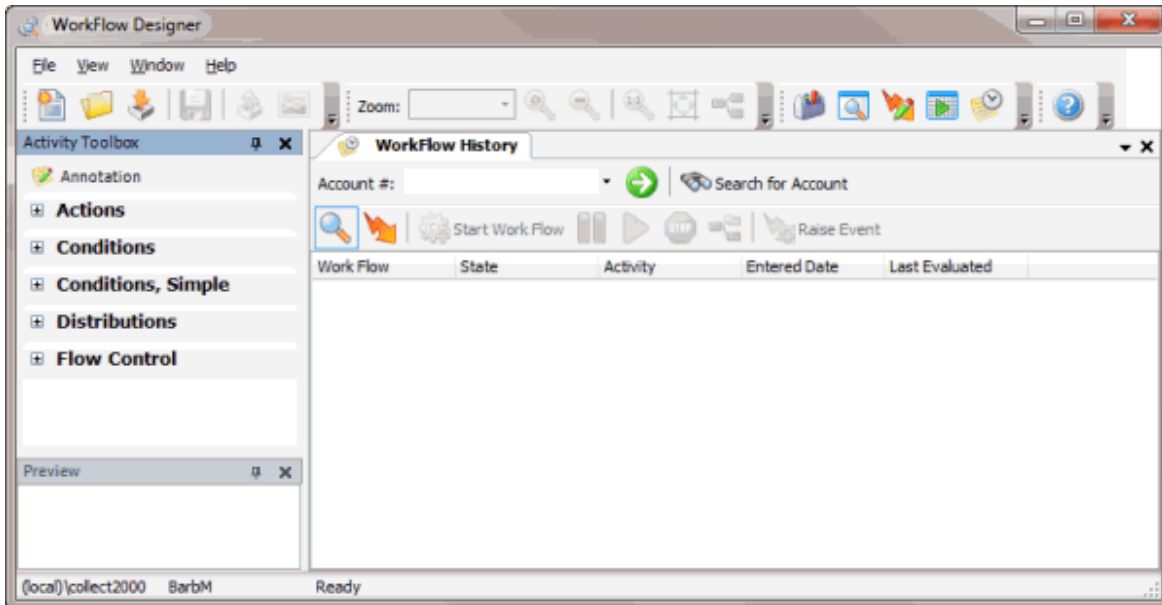
2. Do one of the following:
 - If you know the account number, in the **Account #** box, type the account number and then click the Go icon .
 - To search for an account, do the following:
 - a. Click **Search for Account**. The **Search - Search for Account** window appears.
 - b. Type search criteria into one or more boxes. For fewer results, provide more information. For more results, provide less information.
 - c. Click **Search**. The results display on the **Search Results** tab.
 - d. Double-click the account.
3. Click the workflow to stop and then, in the toolbar on the tab, click the Stop icon . A confirmation dialog box appears.
4. Click **Yes**. The WorkFlow Engine stops processing the account in the workflow and deletes the workflow from the **Workflow** page of the **WorkFlow History** tab.



Raise an Event on an Account

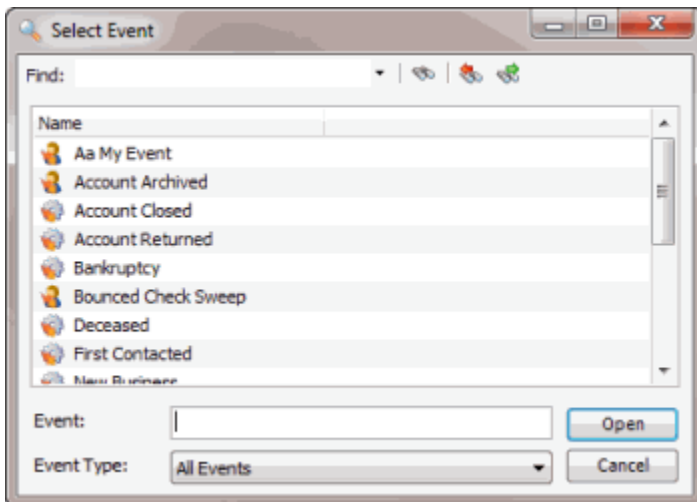
Use the **WorkFlow History** tab to raise an event on an account.

To raise an event on an account


1. From the **Window** toolbar, click the Workflow History icon . The **WorkFlow History** tab appears.

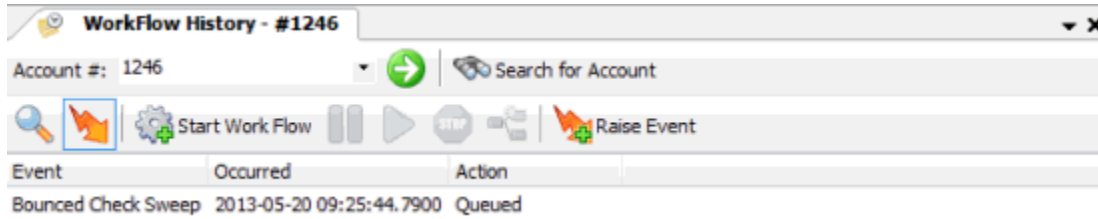


2. Do one of the following:
 - If you know the account number, in the **Account #** box, type the account number and then click the Go icon .
 - To search for an account, do the following:
 - a. Click **Search for Account**. The **Search - Search for Account** window appears.
 - b. Type search criteria into one or more boxes. For fewer results, provide more information. For more results, provide less information.
 - c. Click **Search**. The results display on the **Search Results** tab.
 - d. Double-click the account.
3. In the toolbar on the tab, click the Raise Event icon . The **Select Event** dialog box appears.

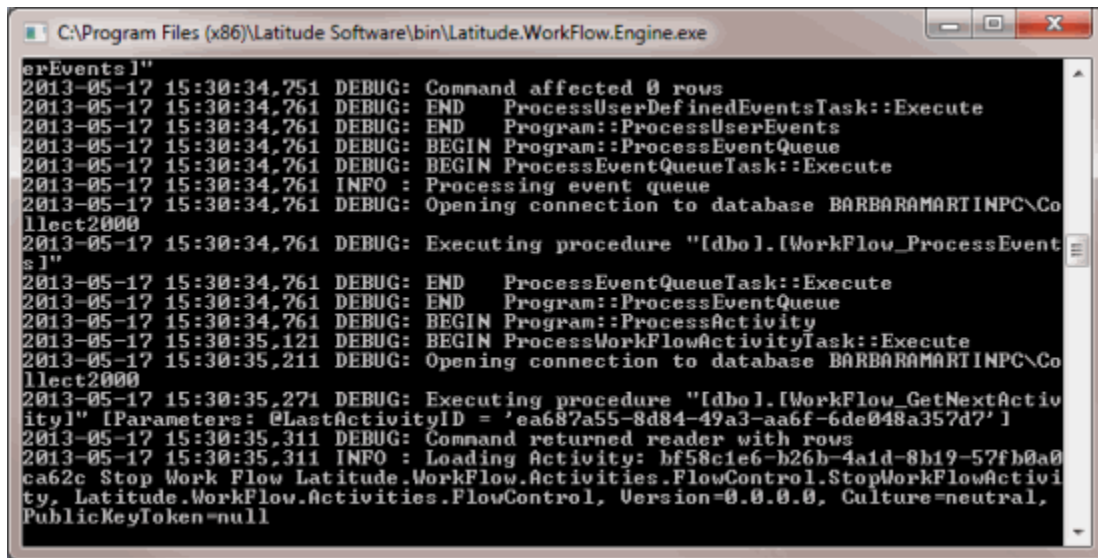


4. Click an event and then click **Open**.

- On the **WorkFlow History** tab, click the Events Raised icon . The **Events Raised** page shows that the event is queued for processing.



- To run the event, open the "C:\Program Files (x86)\Interactive Intelligence\Interaction Collector\bin" folder and double-click **WorkFlow.Engine**. The WorkFlow Engine begins processing the queued event.



- When processing completes, on the **Events Raised** page, the event shows the workflow that started the event. The **Workflow** page shows that the workflow completed.

WorkFlow Query Action Wizard

WorkFlow Query Action Wizard


Use the **WorkFlow Query Action Wizard** to select accounts to process. The **Run** option is unavailable so there isn't a way to review results in Workflow Designer. We recommend that you review the results in Account Analysis to verify that the criteria captures the correct accounts. For more information, see "Account Analysis" in the *Latitude* documentation.

Select and Configure Conditions

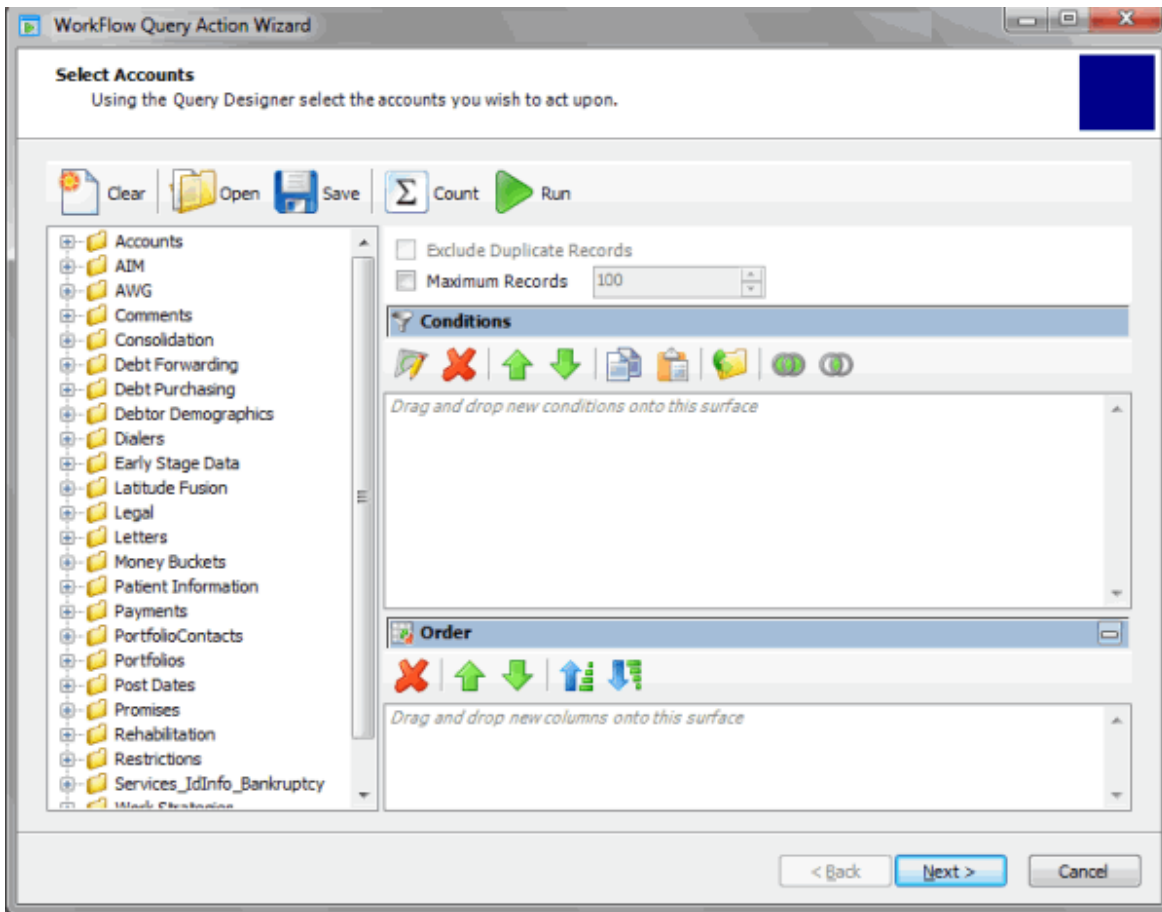
Use the **Select Accounts** page of the **WorkFlow Query Action Wizard** to select conditions and specify the criteria for accounts to process.

To select and configure conditions

- Do one of the following:

- From the **File** menu, click **Create New Work Flow**.
- From the **Window** toolbar, click the Open WorkFlow Query Action Wizard icon .

The **WorkFlow Query Action Wizard** appears.

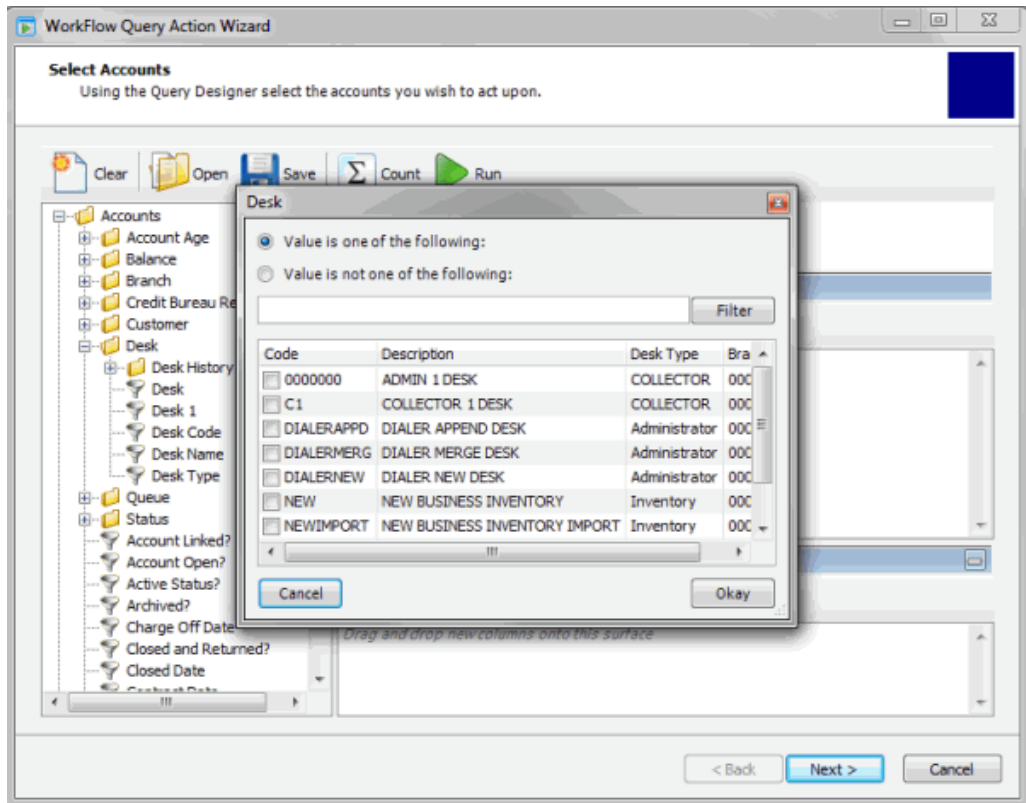


- To open an existing query, do the following:
 - In the toolbar, click **Open**. The **Open Query Dialog** box appears.
 - Click the query and then click **Open**. The query appears in the **Select Accounts** page.
- To specify conditions for processing specific accounts, do the following:

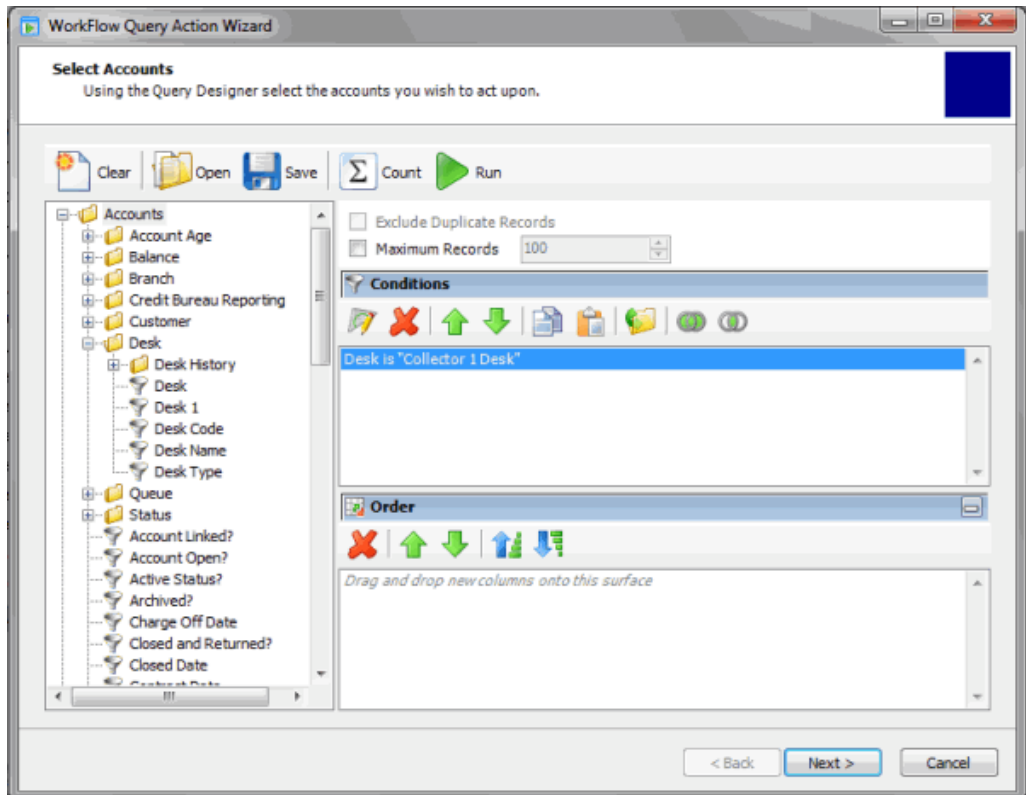
Note: To process all accounts, don't specify any conditions.

- In the **Data Selection** pane, click the plus sign (+) next to a folder to expand it.
- Drag and drop a data item into the **Conditions** pane. A dialog box appears, which allows you to specify the criteria. The title of the dialog box and the information displayed depend on the condition selected.

In the following example, the user dragged and dropped the **Desk** data item into the **Conditions** pane, causing the **Desk** dialog box to appear.



- c. In the dialog box, specify the criteria and then click **Okay**. The condition appears in the **Conditions** pane. In the following example, the condition indicates that you want to include accounts assigned to the "Collector 1 Desk."



- d. Drag and drop more data items into the **Conditions** pane as necessary. For more information about modifying, copying, grouping, arranging, and deleting conditions, see [Query Conditions](#).
4. To specify data to include as a column in the query, do the following:
 - a. In the **Data Selection** pane, click the data to include and drag and drop it in the **Order** pane.
 - b. Drag and drop more data items into the **Order** pane as necessary.

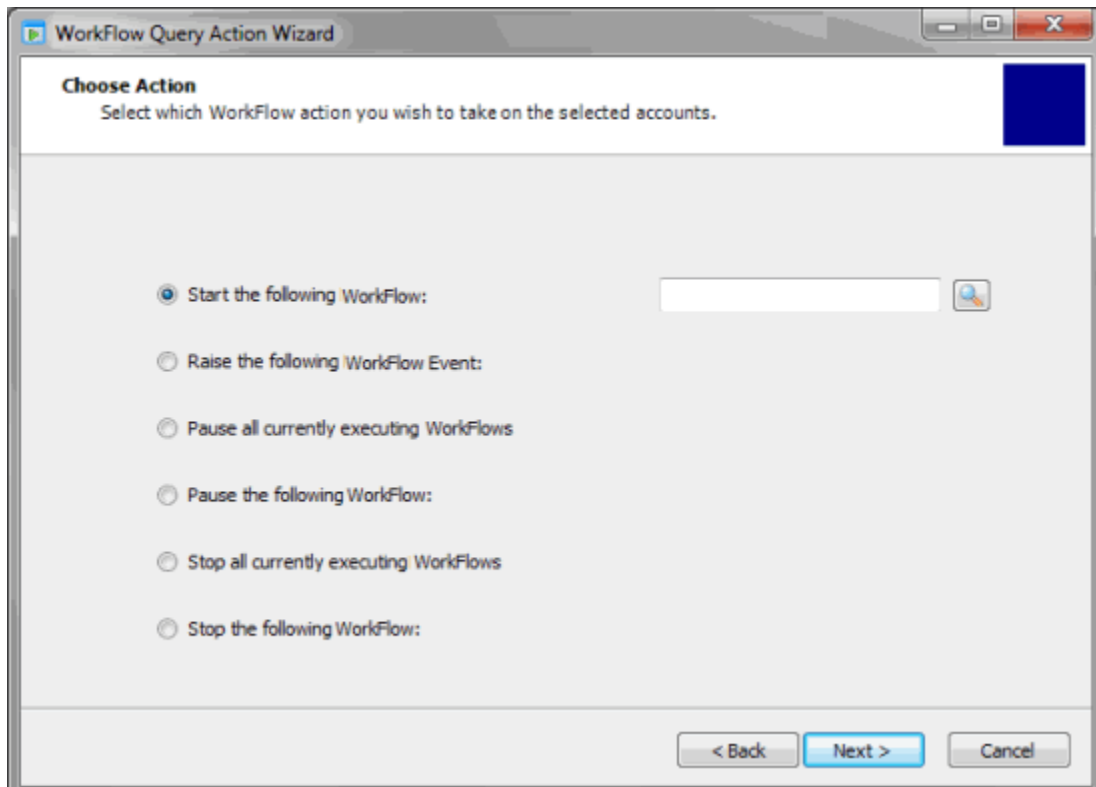
For more information about arranging, sorting, and deleting columns, see Query Column Order.
 5. To limit the query to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the query.
 6. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.
 7. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.
 8. Click **Next**. The **Choose Action** page appears.
 9. Do the steps to [Select an Action to Process](#).

Select an Action to Process

Use the **Choose Action** page of the **WorkFlow Query Action Wizard** to select an action to process on accounts. If you specified criteria on the **Select Accounts** page, the WorkFlow Engine processes accounts that meet that criteria and ignores all other accounts. If you didn't specify criteria, the WorkFlow Engine processes all accounts.

To select an action to process

1. Do the steps to [Select and Configure Conditions](#). The **Choose Action** page appears.



Start the following WorkFlow: Sends accounts to the specified workflow.

Raise the following WorkFlow Event: Sends accounts to the specified event and into the workflow attached to the event.

Pause all currently executing WorkFlows: Pauses the accounts in all workflows that are running. Some workflows require a **Resume Workflow** activity to release the accounts so that the remaining activities can finish processing in their respective workflows.

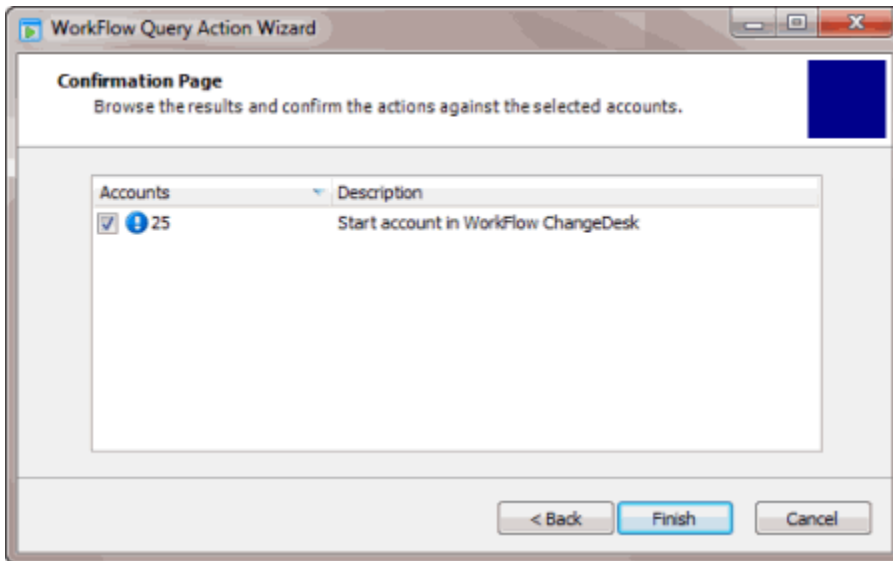
Pause the following WorkFlow: Pauses accounts within the specified workflow. To pause more than one workflow, but not all workflows, pause each one individually.

Stop all currently executing WorkFlows: Stops accounts from processing in all workflows that are running.

Stop the following WorkFlow: Stops accounts from processing in the specified workflow.

Note: You cannot resume a stopped workflow.

2. Select the action to process. If you chose to process an action for a specific workflow, do the following:
 - a. Click the Search icon. The **Open WorkFlow** dialog box appears.
 - b. Click the workflow and then click **Open**. WorkFlow Designer populates the workflow box on the **Choose Action** page with the specified workflow.
3. On the **Choose Action** page, click **Next**. A confirmation dialog box appears.
4. Click **OK**. The **Confirmation Page** appears. This page shows the number of accounts selected for processing.



5. To exclude a group of accounts, clear the check box.
6. To adjust the criteria, click **<Back**.
7. Click **Finish**. WorkFlow Designer does the specified action on the accounts that meet the specified conditions.

Query Conditions

Query Conditions

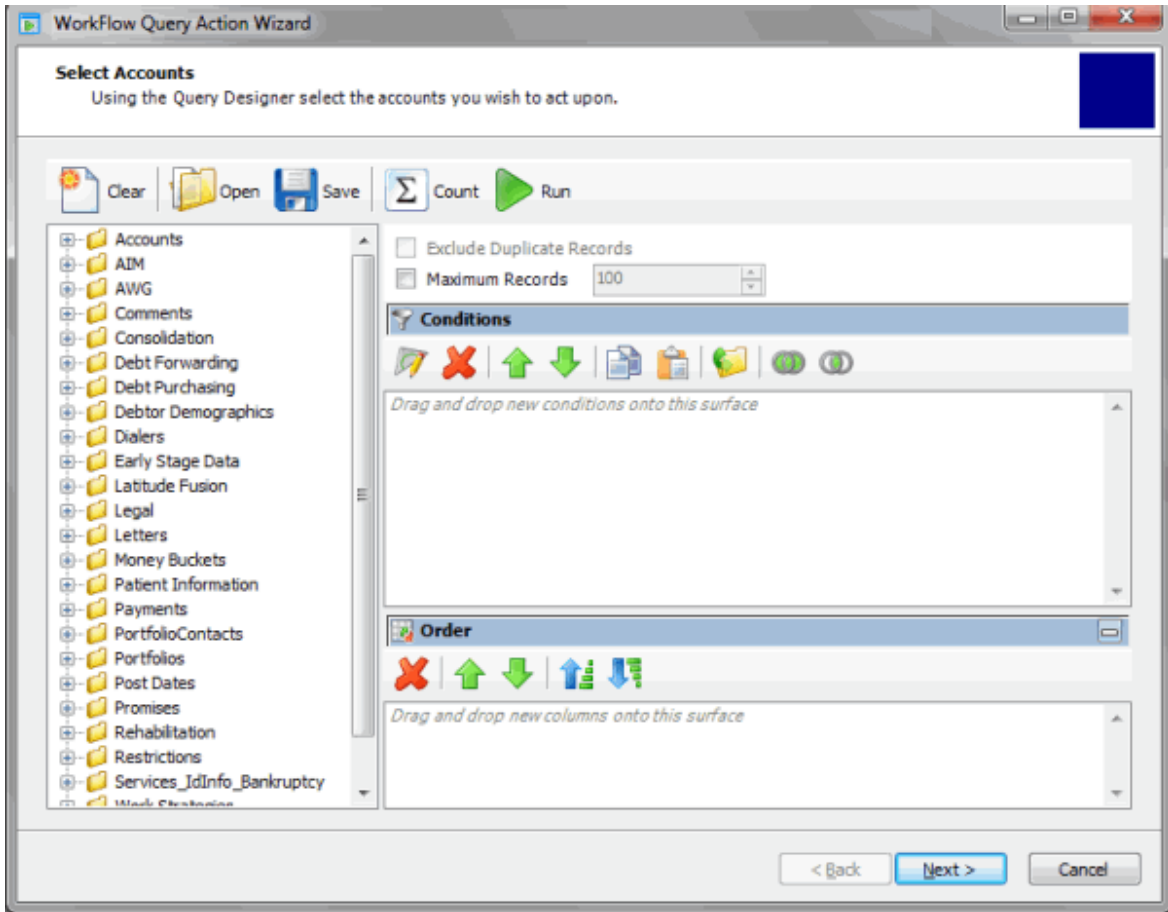
Use the **Conditions** pane of the **Select Accounts** page to specify the criteria for selecting accounts to process.

Add a Condition to a Query

Use the **Conditions** pane of the **Select Accounts** page to add a condition to a query.

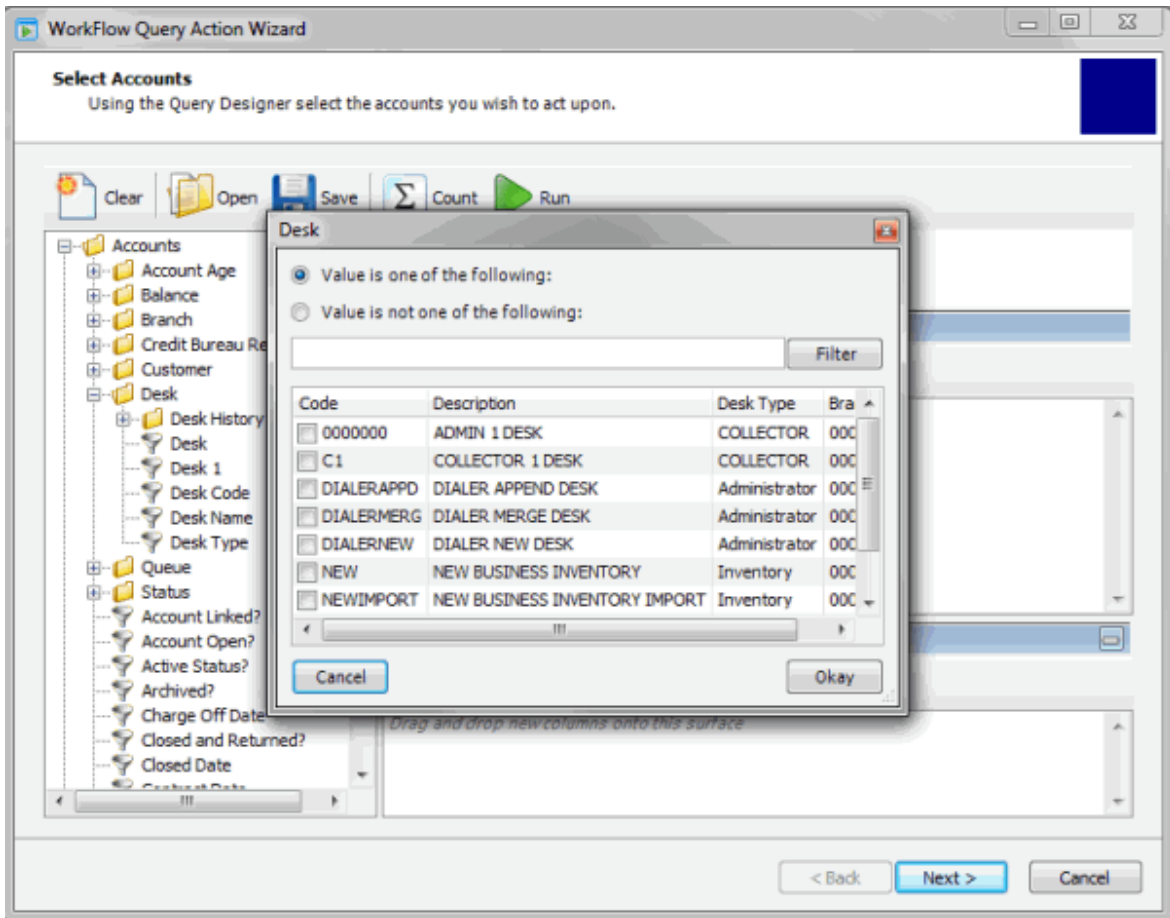
To add a condition to a query

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).

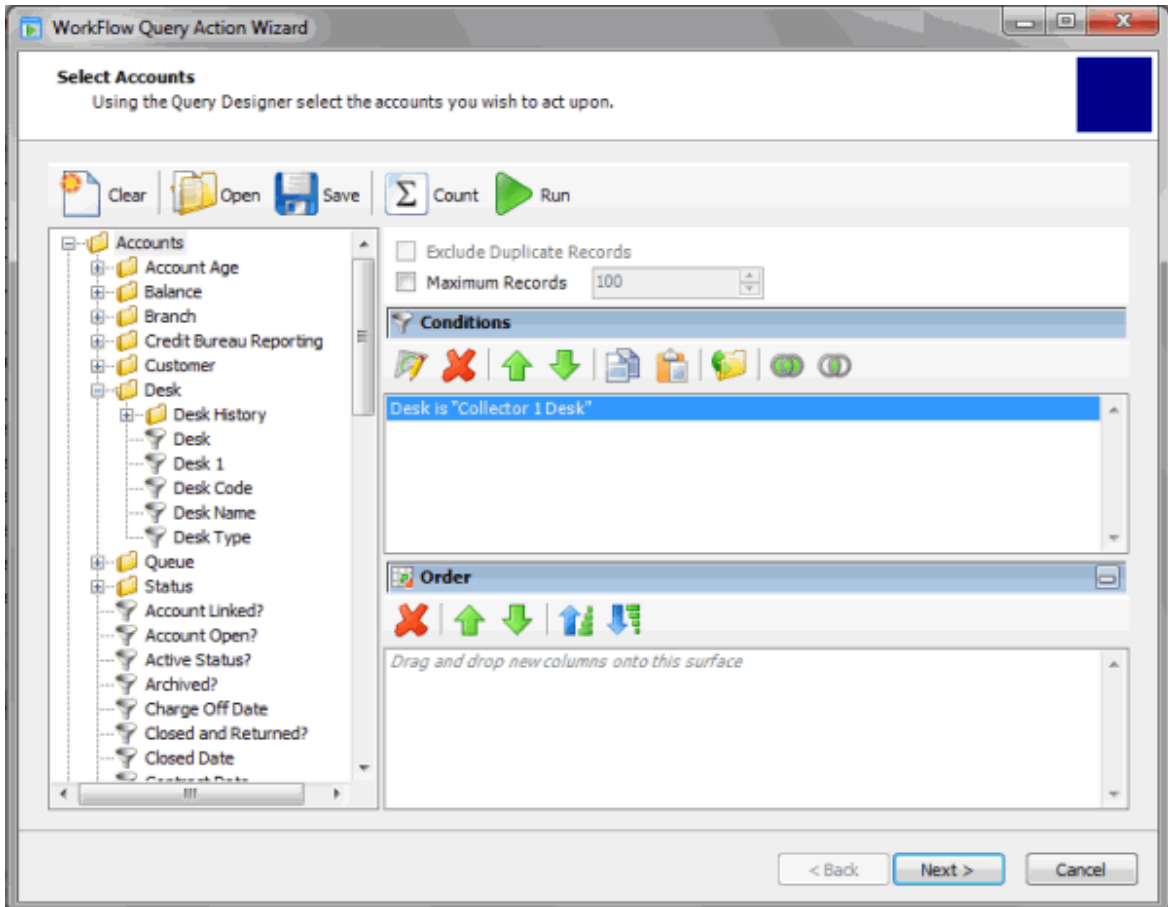


2. In the **Data Selection** pane, click the plus sign (+) next to a folder to expand it.
3. Drag and drop a data item into the **Conditions** pane. A dialog box appears, which allows you to specify the criteria. The title of the dialog box and the information displayed depend on the condition selected.

In the following example, the user dragged and dropped the **Desk** data item into the **Conditions** pane, causing the **Desk** dialog box to appear.



4. In the dialog box, specify the criteria and then click **Okay**. The condition appears in the **Conditions** pane. In the following example, the condition indicates that you want to include accounts assigned to the "Collector 1 Desk."



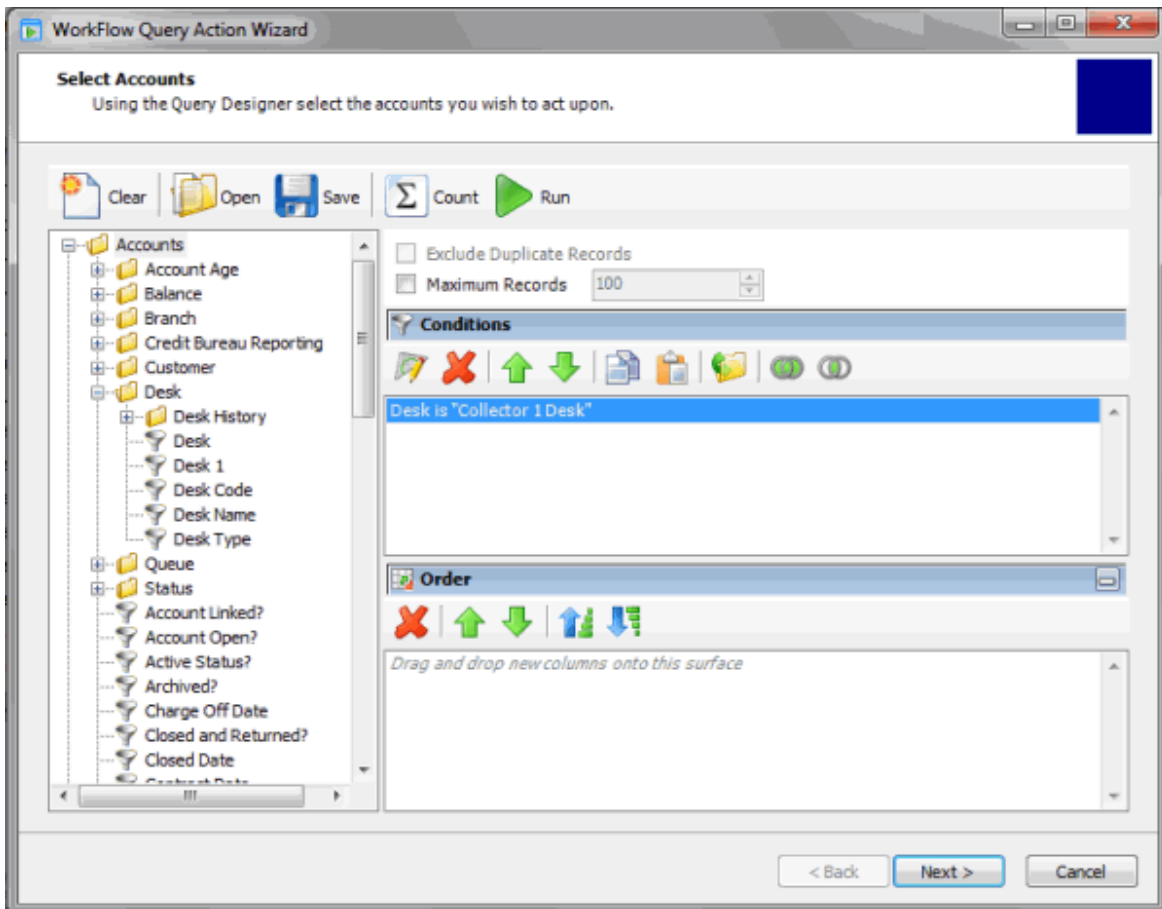
5. Drag and drop more data items into the **Conditions** pane as necessary. For more information about modifying, copying, grouping, arranging, and deleting conditions, see [Query Conditions](#).
6. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.

Modify a Query Condition

Use the **Conditions** pane of the **Select Accounts** page to modify a query condition.

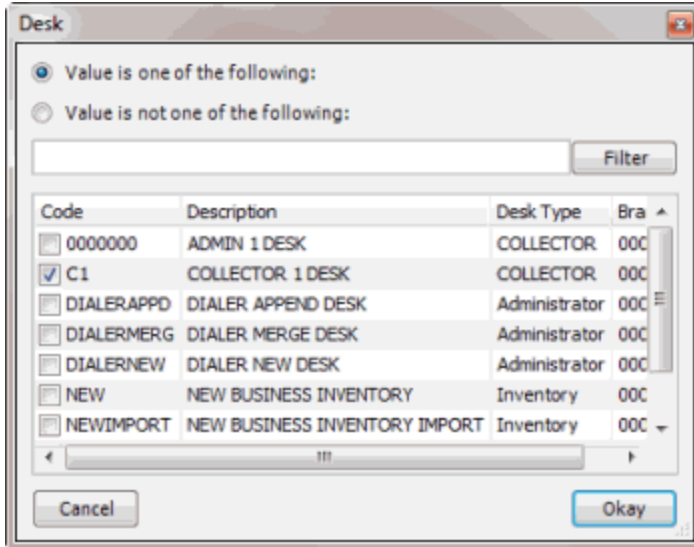
To modify a query condition

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).



2. In the **Conditions** pane, do one of the following:
 - Double-click a condition.
 - Right-click a condition and then click **Edit**.
 - In the **Conditions** toolbar, click the Edit icon.

A dialog box appears, which allows you to modify the criteria. The title of the dialog box and the information displayed depends on the condition selected. The following example shows the **Desk** dialog box.



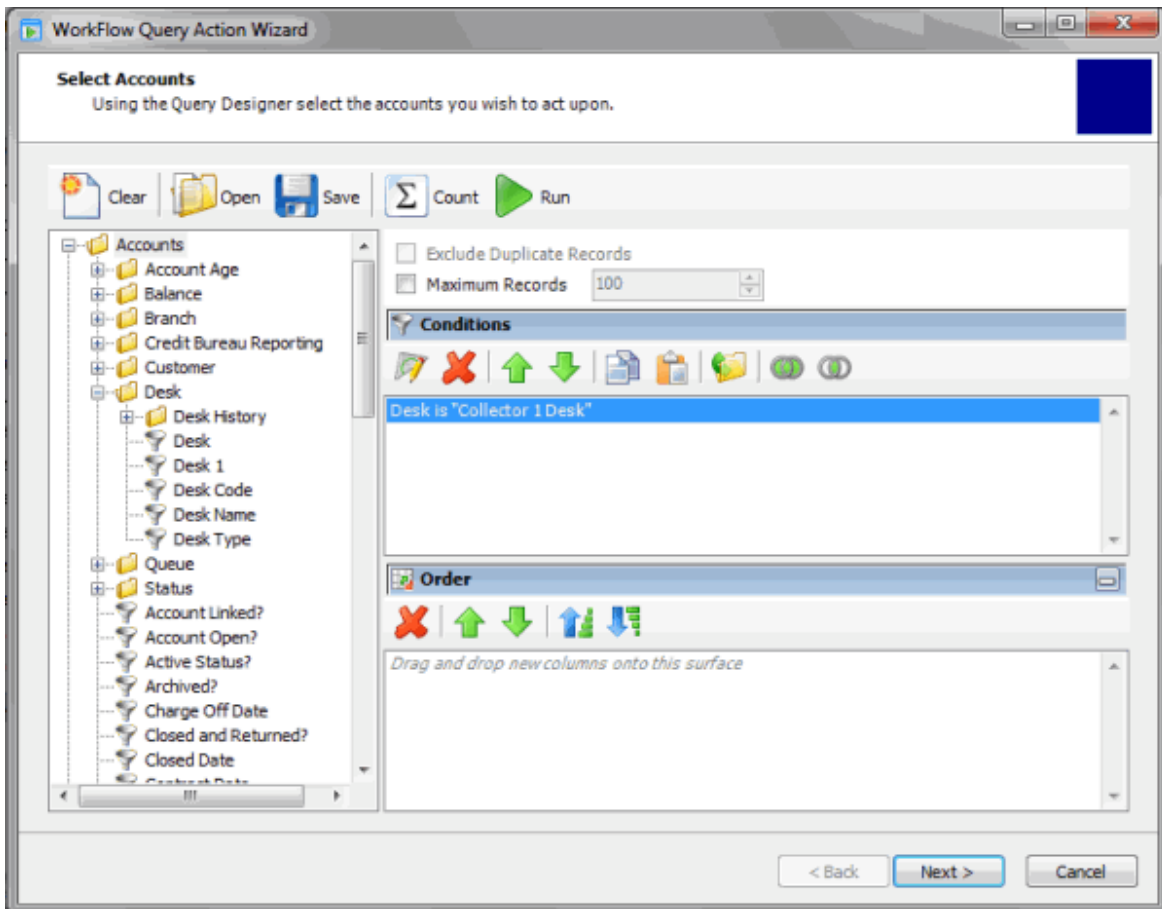
3. In the dialog box, modify the criteria and then click **Okay**. The query designer updates the condition in the **Conditions** pane.
4. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.

Copy a Query Condition

Use the **Conditions** pane of the **Select Accounts** page to copy a query condition.

To copy a query condition

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).



2. In the **Conditions** pane, do one of the following:
 - Right-click a condition and then click **Copy**.
 - Click a condition and then, in the **Conditions** toolbar, click the Copy icon.

The query designer copies the condition to the Clipboard.

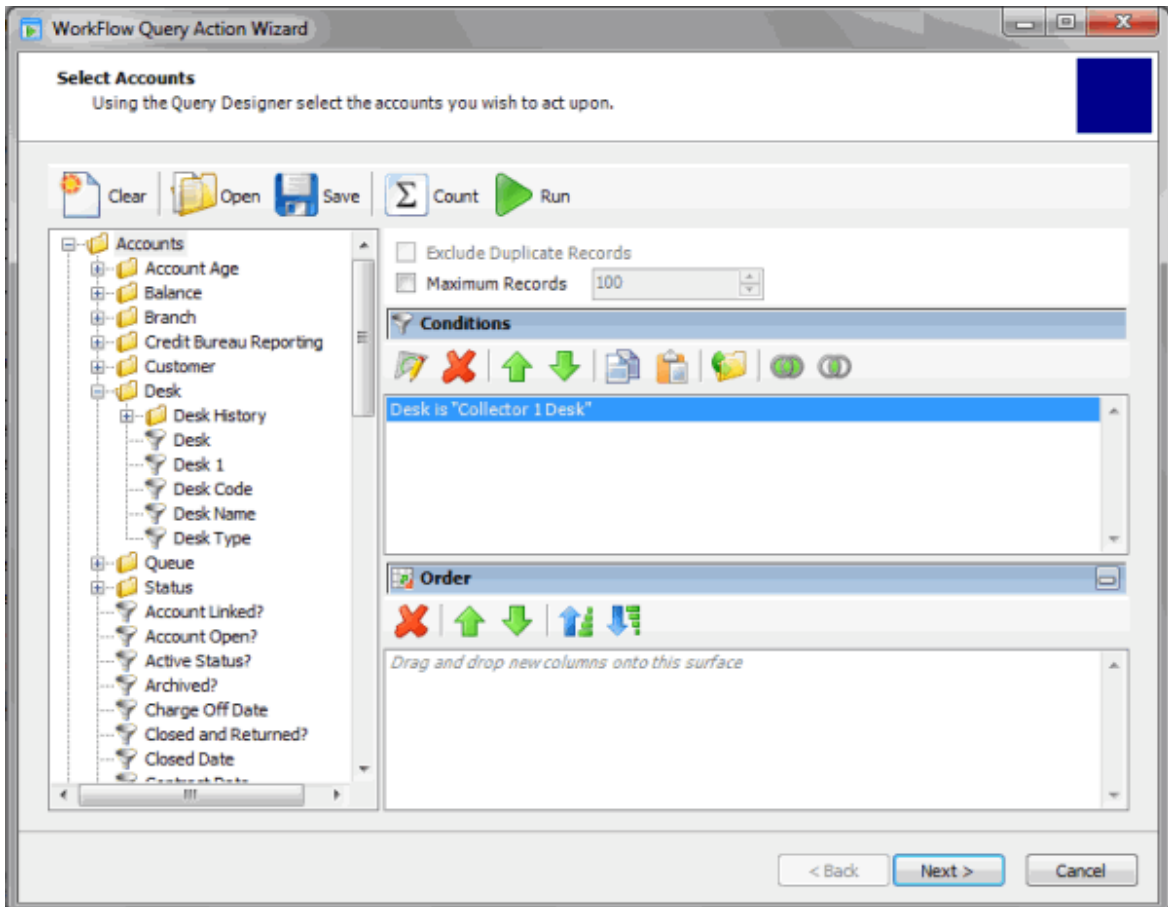
3. In the **Conditions** pane, right-click where you want to copy the condition and then click **Paste**.
The query designer pastes the condition in the specified location.
4. Modify the condition as needed. For more information, see [Modify a Query Condition](#).
5. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.

Group Query Conditions for Evaluation

Use the **Conditions** pane of the **Select Accounts** page to group query conditions.

To group query conditions

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).

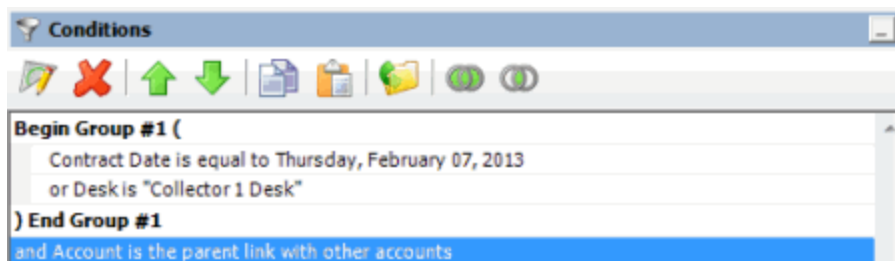


2. In the **Conditions** pane, select the conditions to group.

Tip: To select multiple sequential conditions, press and hold the **Shift** key and click the first and last sequential condition. To select multiple non-sequential conditions, press and hold the **Ctrl** key and click each individual condition. To select all conditions, right-click and then click **Select All**.

3. Do one of the following:
 - Right-click a condition and then click **Group**.
 - In the **Conditions** toolbar, click the Group icon.

The query designer groups the selected conditions and flags the beginning and ending of the group.



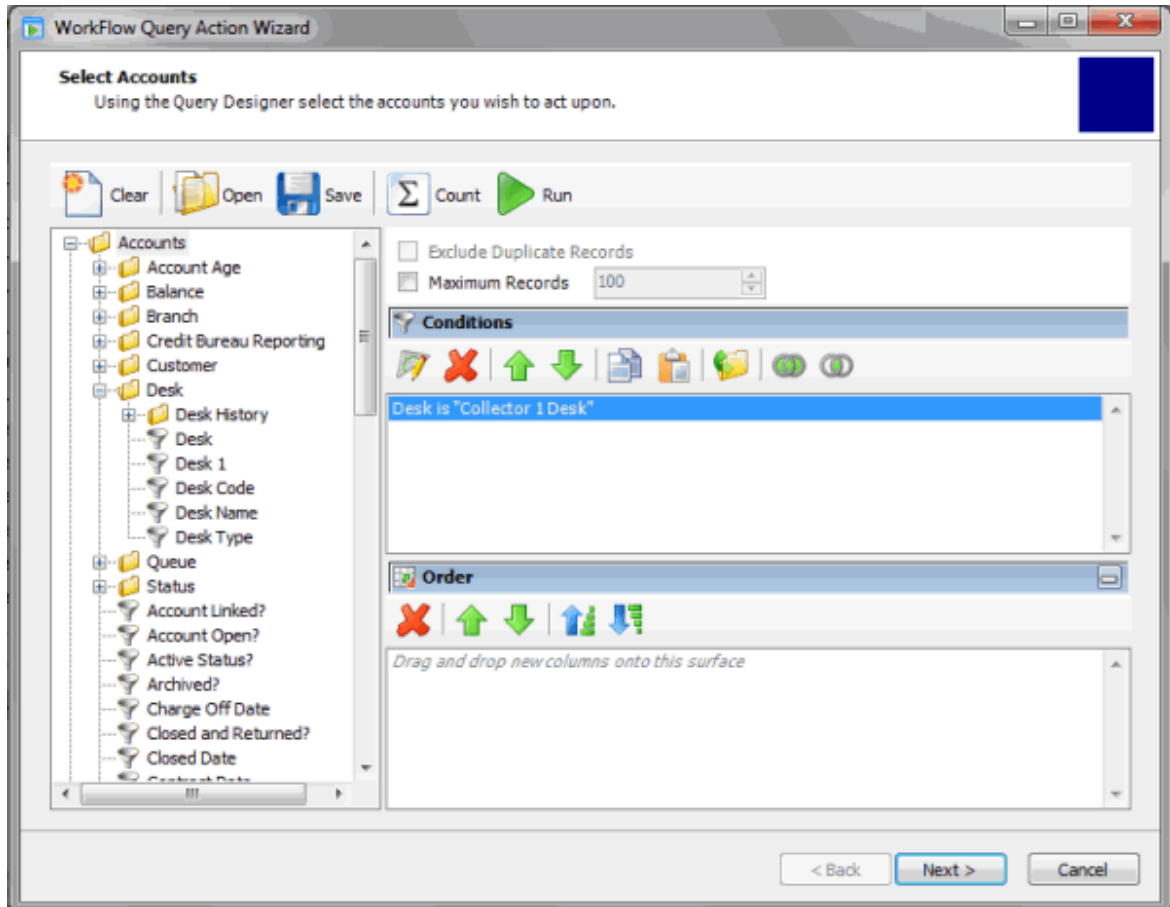
4. Continue grouping conditions as necessary.
5. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.



Modify the Order of Query Conditions

Use the **Conditions** pane of the **Select Accounts** page to modify the order in which to evaluate query conditions.

To modify the order of query conditions

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).



2. In the **Conditions** pane, do the following:
 - To move up a condition, click the condition and then click the up  arrow.
 - To move down a condition, click the condition and then click the down  arrow.

The query designer moves the condition the specified direction.

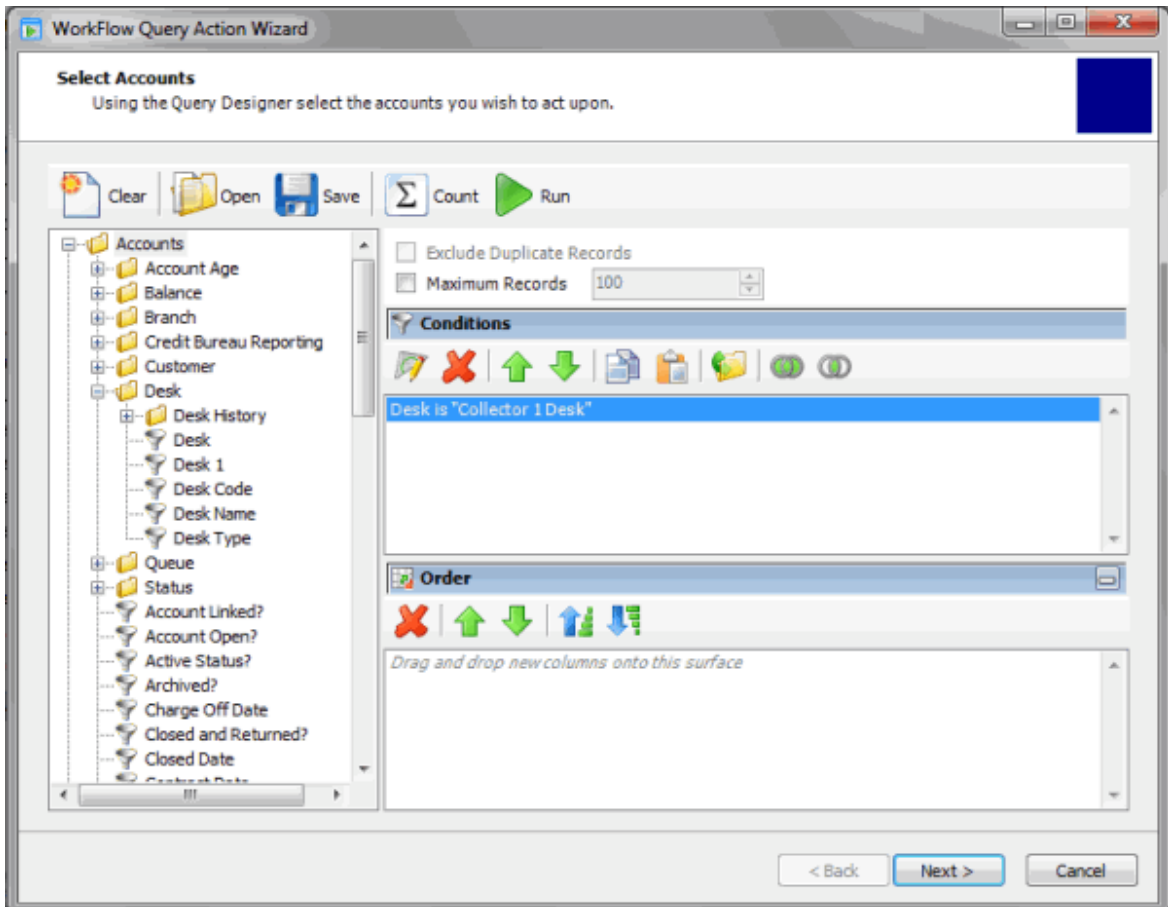
3. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.

Set a Query Condition to Optional or Required

Use the **Conditions** pane of the **Select Accounts** page to set a query condition to optional or required. The query designer sets conditions to "required" by default. If a query has a single condition, the query requires that condition and you cannot set it to optional. If a query has more than one condition, you can set each condition that follows the first condition in the list to required or optional. For more information about Boolean operators, see [Boolean Operators](#).

To set a query condition to optional or required

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).



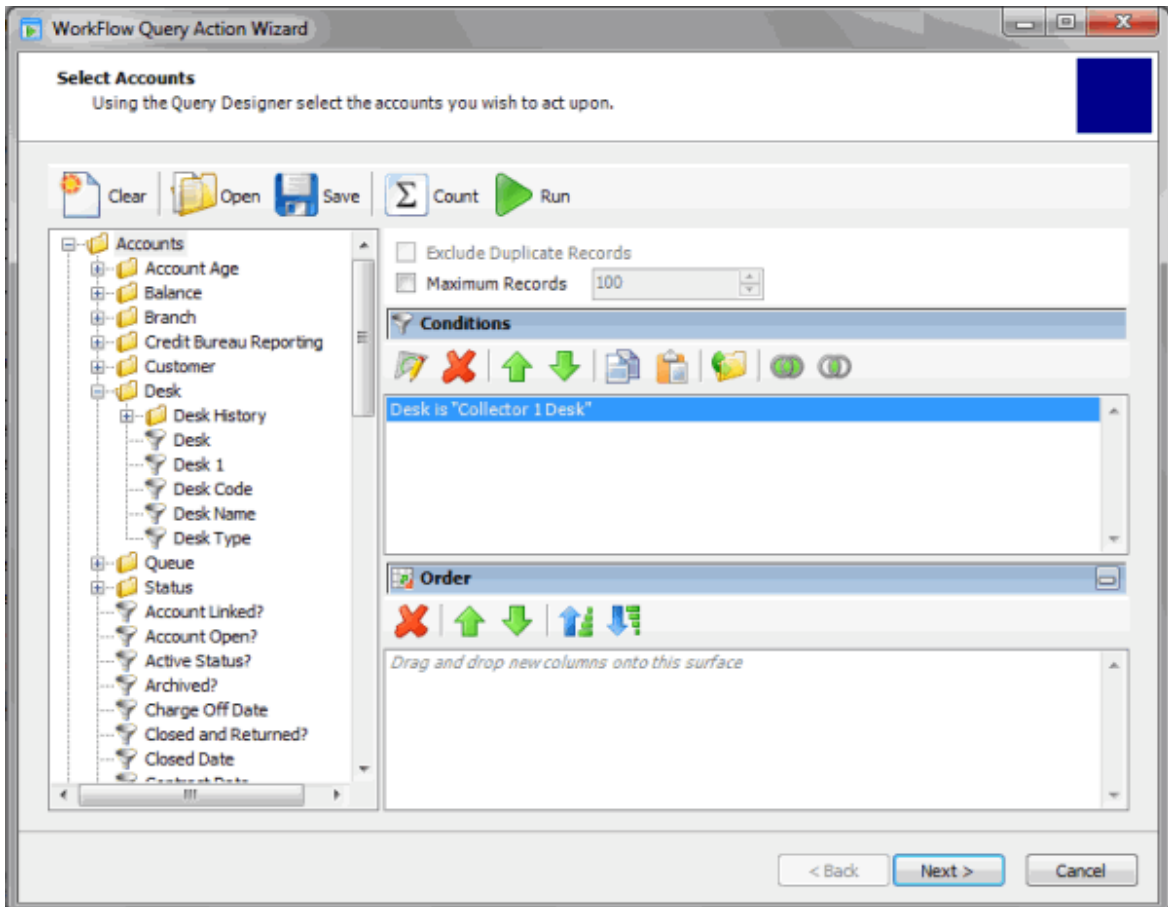
2. In the **Conditions** pane, do one of the following:
 - To change a query so that only one condition has to be true for an account to appear in the query results, click the second condition and then, in the toolbar, click the OR icon . The condition changes from "and" to "or."
 - To change the query so that the query requires both conditions for an account to appear in the query results, click the second condition and then, in the toolbar, click the AND icon . The condition changes from "or" to "and."
3. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.

Delete a Query Condition

Use the **Conditions** pane of the **Select Accounts** page to delete a query condition.

To delete a query condition

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).



2. In the **Conditions** pane, do one of the following:
 - Right-click a condition and then click **Delete**.
 - Click a condition and then, in the **Conditions** toolbar, click the Delete icon.A confirmation dialog box appears.
3. In the confirmation dialog box, click **Yes**.
4. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.

Query Condition Types

You use query conditions when creating and running queries. For each condition you select for your query, you specify the criteria to use to evaluate accounts. The criteria available is based on the condition type.

Each condition is one of the following types:

- [Dates](#)
- [Single option](#)
- [Multiple option](#)

Dates

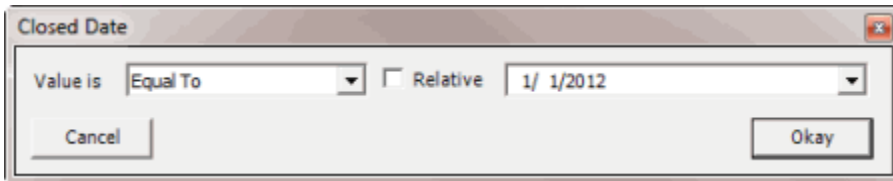
Date conditions allow you to query accounts based on a [specific date](#), [date range](#), [any date or blank date](#), or [relative date](#). When you select a date condition, a dialog box displays to allow you to specify the date criteria. The criteria available depends on the value you select in the **Value is** list box, and whether you select the **Relative** check box.

Specific date

Use one of the following comparisons to evaluate accounts based on a specific date:

Value is	Description
Equal To	Retrieves accounts where the date matches a specific date.
Not Equal To	Retrieves accounts where the date does not match a specific date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after a specific date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before a specific date.
Later Than	Retrieves accounts where the date comes after a specific date.
Earlier Than	Retrieves accounts where the date comes before a specific date.

In the following example, the system retrieves accounts where the **Closed Date** is 01/01/2012.



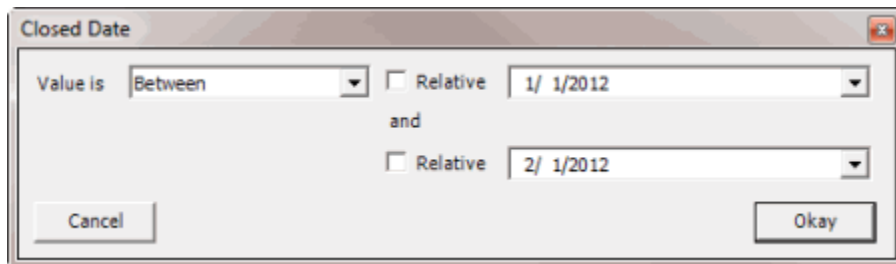
Date range

Use one of the following comparisons to evaluate accounts based on a date range:

Value is	Description
Between	Retrieves accounts where the date falls between two specific dates.

Value is	Description
Not Between	Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates.

In the following example, the system retrieves accounts where the **Closed Date** falls on or between 01/01/2012 and 02/01/2012.

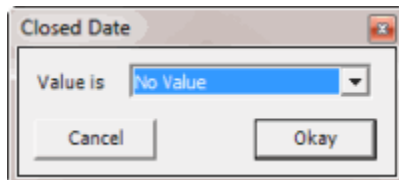


Any date or blank date

Use one of the following comparisons to evaluate accounts based on whether a date is blank or contains any value:

Value is	Description
No Value	Retrieves accounts where the date is blank.
Any Value	Retrieves accounts where the date is any date or blank.

In the following example, the system retrieves accounts where the **Closed Date** is blank (doesn't contain a value).



Relative date

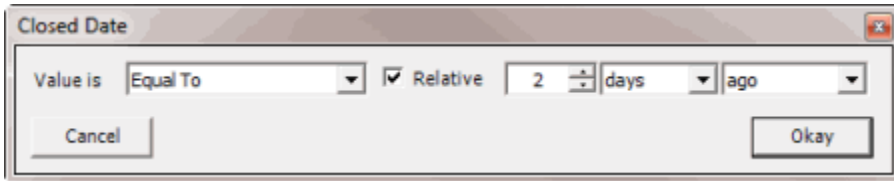
Use the relative date option to evaluate accounts based on the relation of a date to the current date. You specify a comparison and the criteria to use to calculate the relative date. The criteria are the number of days, months or years from the current date, and whether to add or subtract that number from the current date.

Use one of the following comparisons to evaluate accounts based on the calculated relative date:

Value is	Description
Equal To	Retrieves accounts where the date matches the relative date.

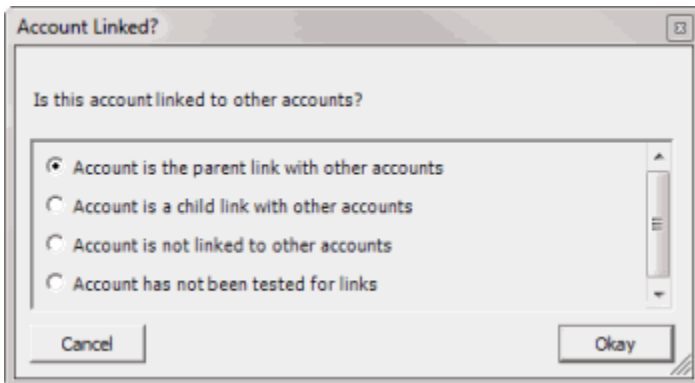
Value is	Description
Not Equal To	Retrieves accounts where the date does not match the relative date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after the relative date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before the relative date.
Later Than	Retrieves accounts where the date comes after the relative date.
Earlier Than	Retrieves accounts where the date comes before the relative date.

In the following example, the system retrieves accounts where the **Closed Date** is two days before the current date.



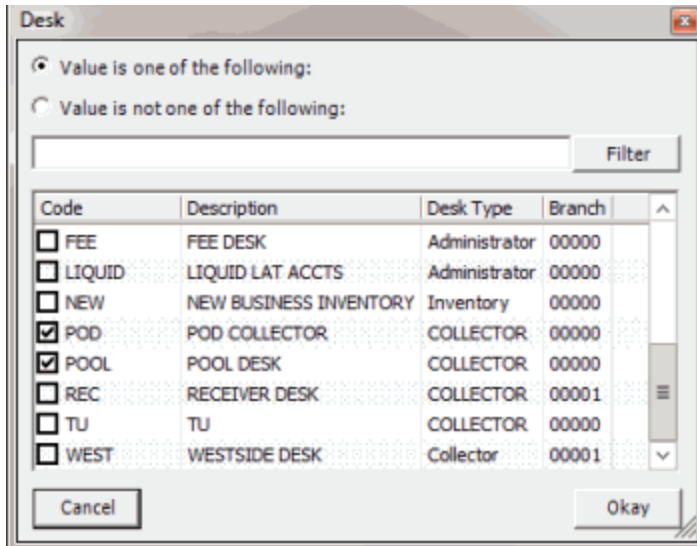
Single option

Single option conditions allow you to retrieve accounts that match a single option in a group of options. In the following example, the system retrieves accounts that are the parent link to other accounts.



Multiple option

Multiple option conditions allow you to retrieve accounts that match one or more options in a group of options. In the following example, the system retrieves accounts assigned to the POD desk and accounts assigned to the POOL desk.

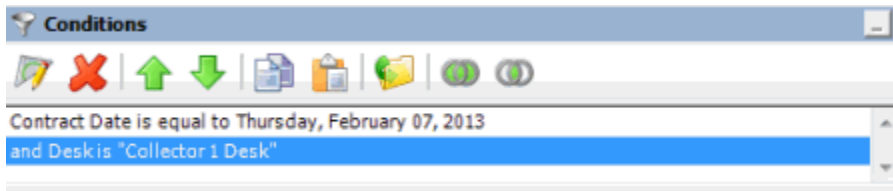


Boolean Operators

Boolean operators allow you to set a query condition to optional or required.

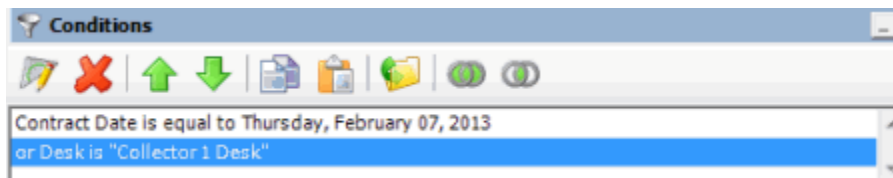
AND condition

In the following example, both conditions must be true for an account to appear in the query results. So, if an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the query results don't include the account. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the query results don't include the account.



OR condition

In the following example, if an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the query results include the account. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is not "February 7, 2013" or the Desk is not "Collect 1 Desk," the query results don't include the account.



Query Column Order

Query Column Order

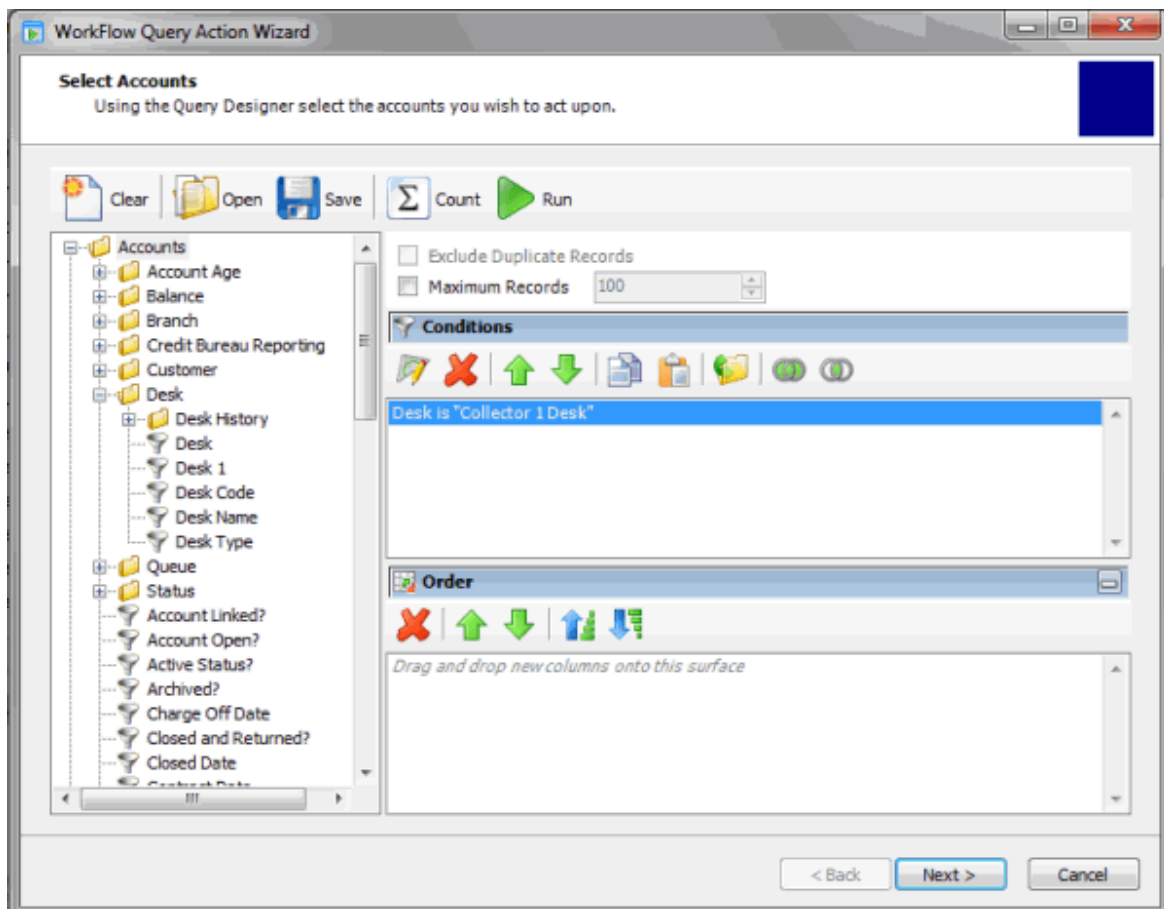
Use the **Conditions** pane of the **Select Accounts** page to specify the data columns to include in a query.

Add a Column to a Query

Use the **Order** pane of the **Select Accounts** page to add a column to a query.

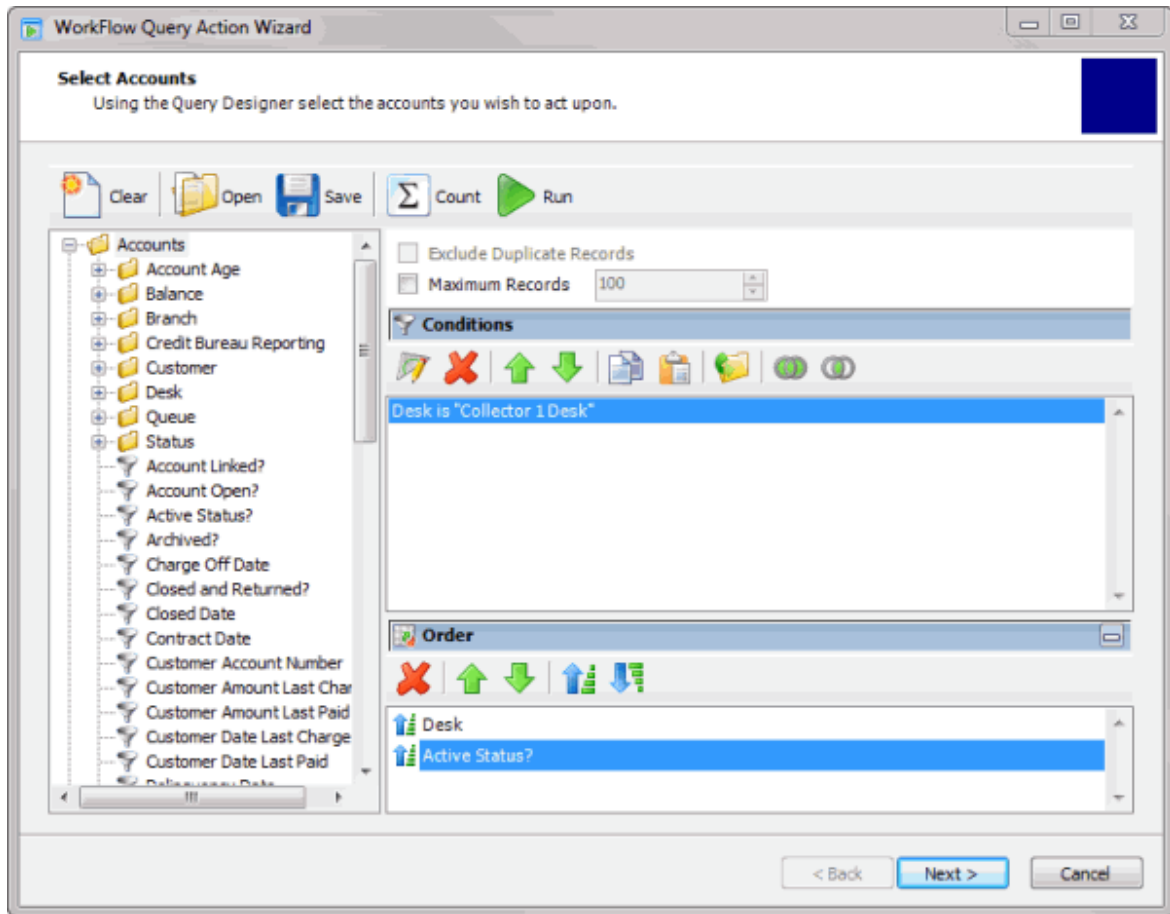
To add a column to a query

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).



2. In the **Data Selection** pane, click the plus sign (+) next to a folder to expand it.
3. Drag and drop a column into the **Order** pane.

In the following example, a user dragged and dropped the **Desk** column into the **Order** pane.



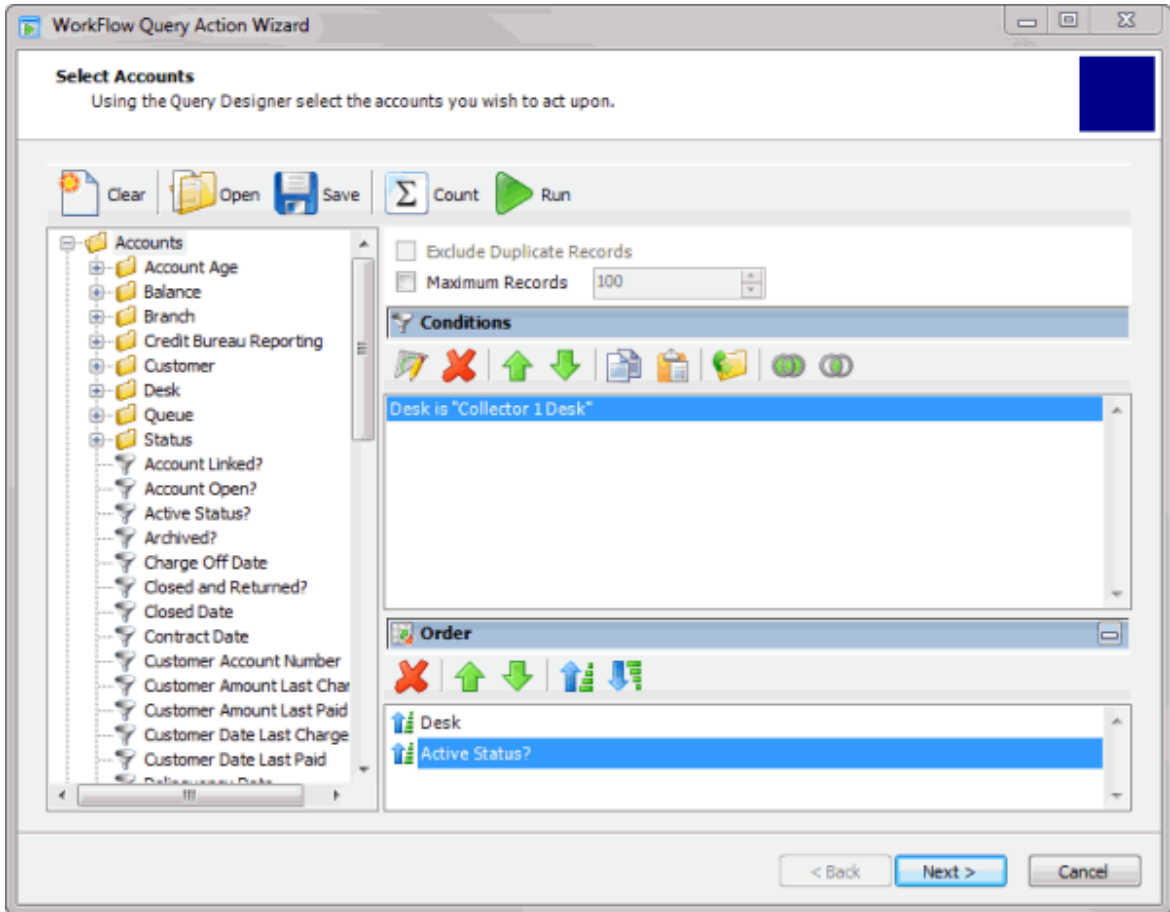
4. Drag and drop more columns into the **Order** pane as necessary. For more information about arranging, sorting, and deleting columns, see [Query Column Order](#).
5. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.

Modify the Order of a Query Column



Use the **Order** pane of the **Select Accounts** page to modify the order in which columns appear.

To modify the order of a query column

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).



2. In the **Order** pane, do the following:

- To move up a column, click the column and then click the up  arrow.
- To move down a column, click the column and then click the down  arrow.

The query designer moves the column the specified direction.

3. To save the query, do the following:

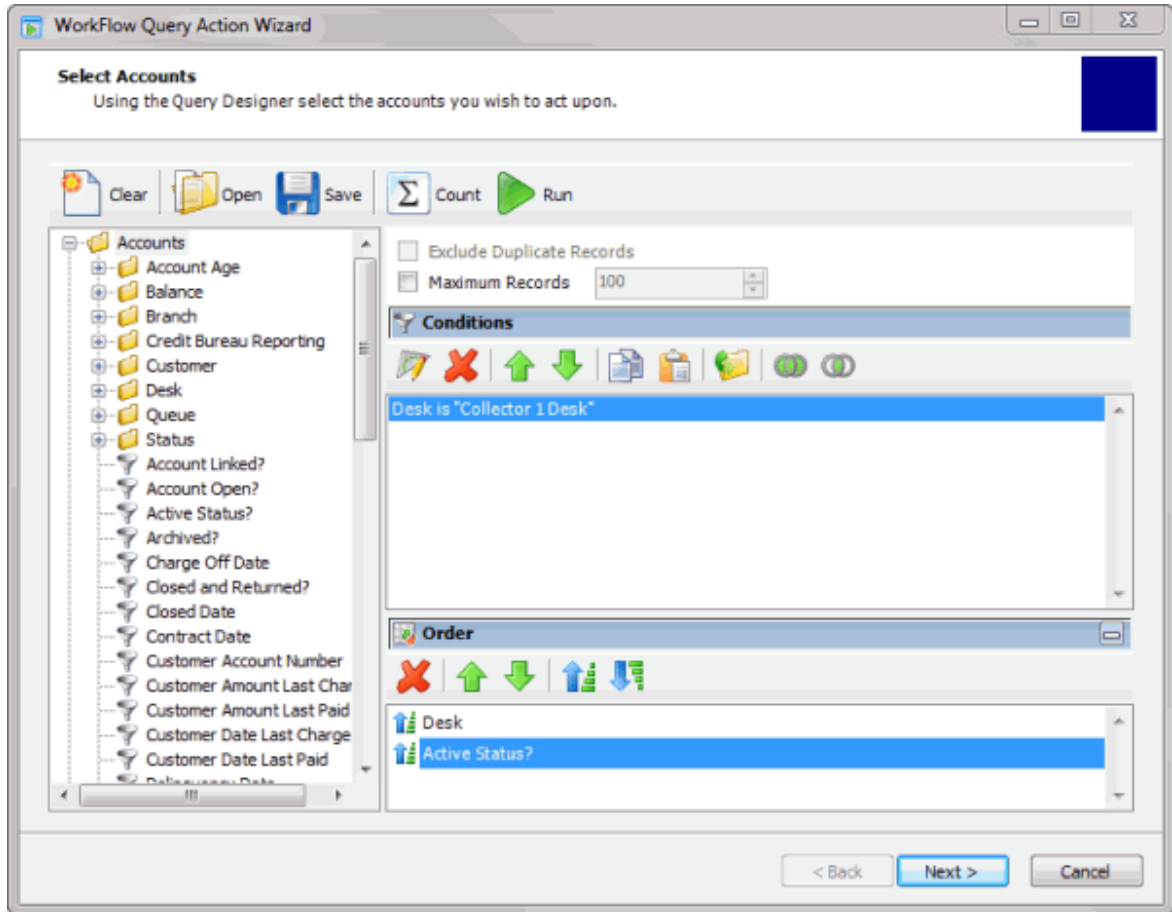
- a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
- b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
- c. To save to an existing query, click the query name and then click **Save**.



Sort Query Columns

Use the **Order** pane of the **Select Accounts** page to change the sort order of columns.

To sort query columns

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).



2. In the **Order** pane, do the following:
 - To sort a column in ascending order, click the column and then click the up arrow .
 - To sort a column in descending order, click the column and then click the down arrow .

The icon next to the column changes to indicate the specified sort order.

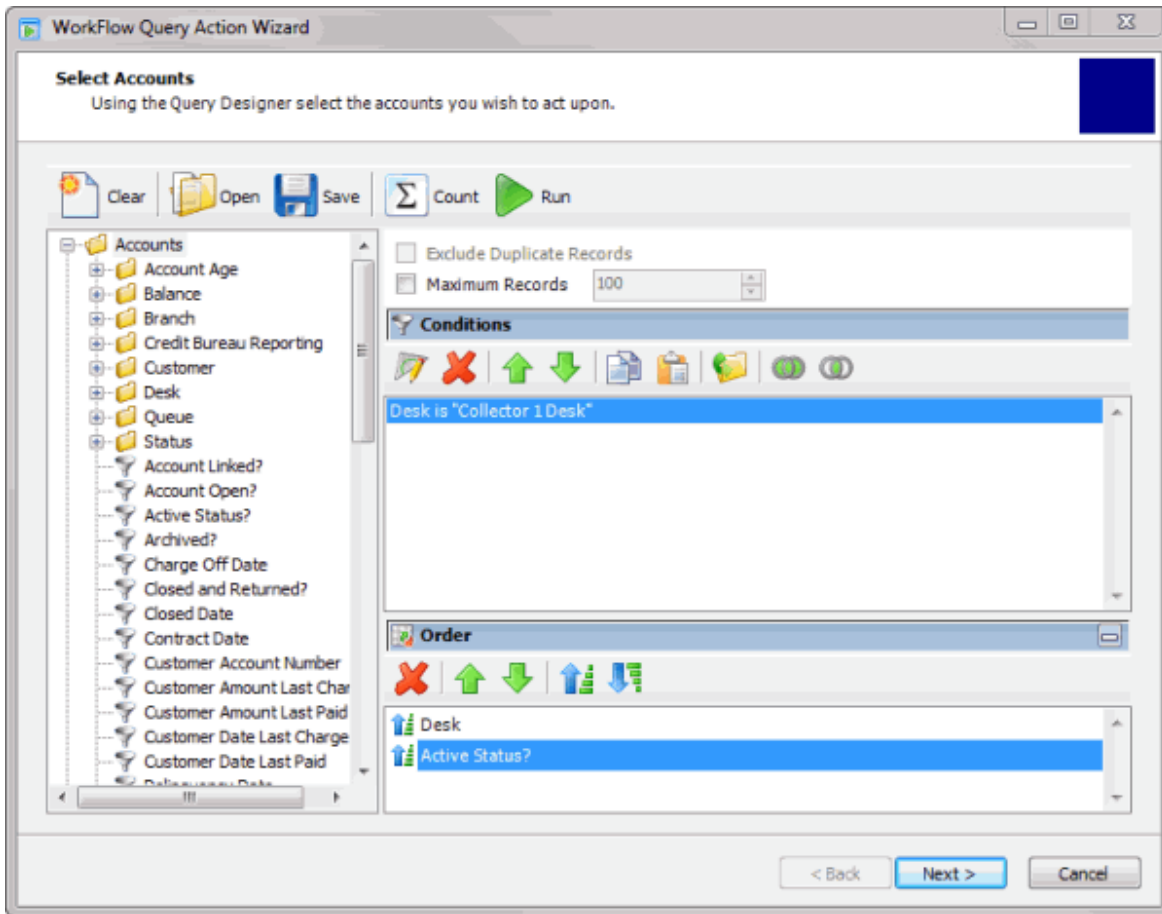
3. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.

Delete a Query Column

Use the **Order** pane of the **Select Accounts** page to delete a query column.

To delete a query column

1. Ensure that you are on the **Select Accounts** page. For more information, see [Select and Configure Conditions](#).



2. In the **Order** pane, do the following:
 - Right-click a column and then click **Delete**.
 - Click a column and then, in the **Order** toolbar, click the Delete icon.

A confirmation dialog box appears.

3. In the confirmation dialog box, click **Yes**.
4. To save the query, do the following:
 - a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
 - b. To save a new query, in the **Query Name** box, type a name for the query and then click **Save**.
 - c. To save to an existing query, click the query name and then click **Save**.