

SAP Workflow: Configuration to Create Work Item in Work-List as Quote Status Changes



Applies to:

SAP Workflow. For more information, visit the [ABAP homepage](#).

Summary

The objective of this document is to provide necessary configuration to be done for the work item to be created in the CRM work list as soon as any particular CRM quote status is set.

This document is a primer and should the reader be interested in furthering his knowledge, his attention is drawn to the reference reading section.

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Introduction

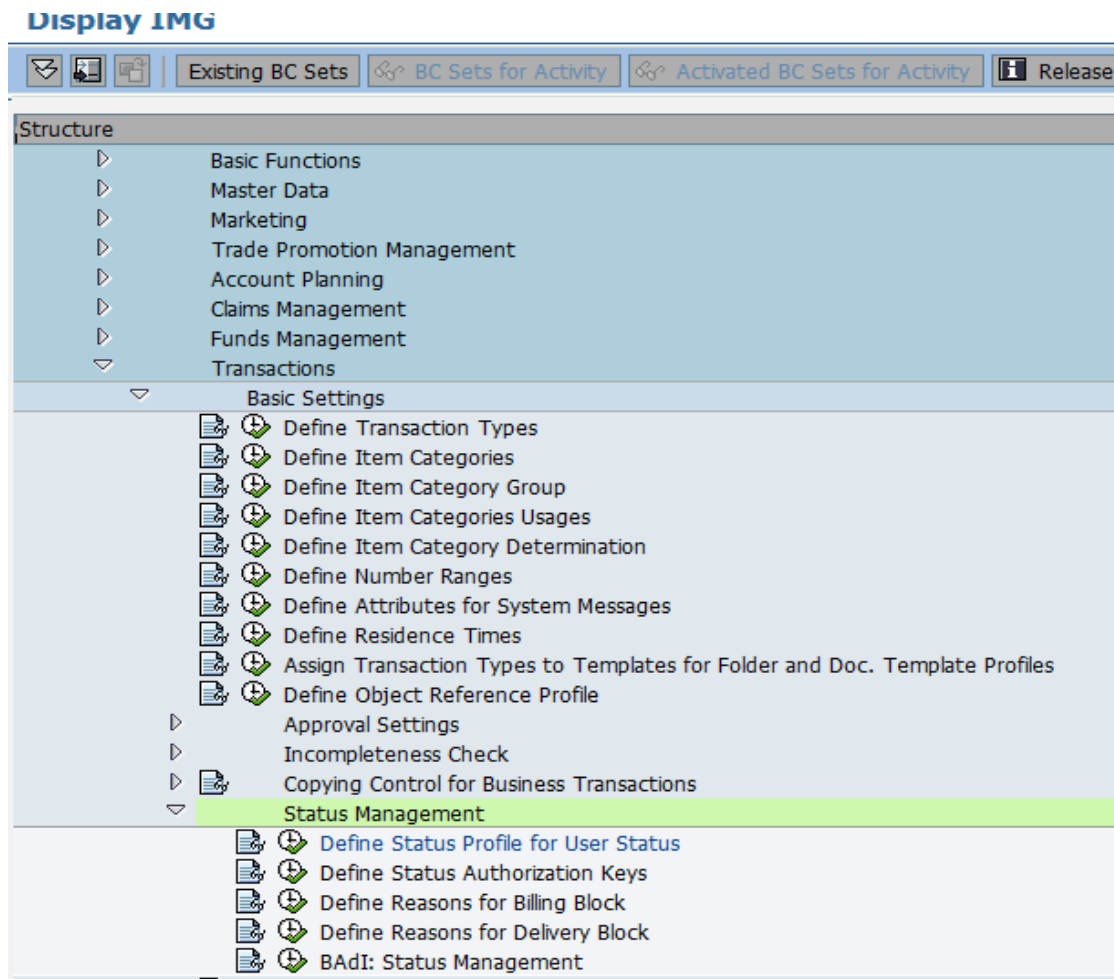
The objective of this document is to provide necessary configuration to be done for the work item to be created in the work list as soon as any particular CRM quote status is set.

For example, in Banking scenario, if a customer applies for a loan application then there are different statuses that a loan application follows. Now if we want to see if corresponding work item created in the work list as soon as quote status changes from 'In Process' to 'Ready for Disbursement'.

Configuration Processing Steps

1. To know what are the different statuses available for a Status profile , follow below mentioned path :

SPRO-> Customer Relationship Management -> Transactions -> Basic Settings -> Status Management -> Define Status Profile for User Status



Change Status Profile: User Status

Object Types

Status Profile: CRMORDER Sales Order
Maintenance Language: DE German

User Status

Stat...	Status	Long...	Init. st...	Lowest...	Highest...	Positi...	Priority	Auth. code	Tra...
	DrSp	<input type="checkbox"/>	<input type="checkbox"/>						
10	Offn	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10	30	1	1		OPEN
20	Bear	<input type="checkbox"/>	<input type="checkbox"/>	20	30	1	1		INPR
30	Erlid	<input type="checkbox"/>	<input type="checkbox"/>	20	30	1	1		FINI

2. Alternatively, it can be checked through table TJ30T:

Data Browser: Table TJ30T Select Entries 4

Check Table...

MAND...	STMA	ESTAT	SPR...	TXT04	TXT30	LTEX...
100	CRMORDER	E0001	E	NoPr	Do not print	
100	CRMORDER	E0002	E	Open	Open	
100	CRMORDER	E0003	E	InPr	In process	
100	CRMORDER	E0004	E	Cmpd	Completed	

3. Check the Action profile for the transaction type for which Quote status is changed. For example, if we have to create a quote for transaction type "AG", get the action profile for the transaction type AG:

Customer Relationship Management

- ▶ CRM Middleware and Related Components
- ▶ CRM Cross-Application Components
- ▶ UI Framework
- ▶ Industry-Specific Solutions
- ▶ Basic Functions
- ▶ Master Data
- ▶ Marketing
- ▶ Trade Promotion Management
- ▶ Account Planning
- ▶ Claims Management
- ▶ Funds Management
- ▶ Transactions

Basic Settings

- ▶ Define Transaction Types
- ▶ Define Item Categories
- ▶ Define Item Category Group
- ▶ Define Item Categories Usages
- ▶ Define Item Category Determination
- ▶ Define Number Ranges

Change View "Definition of transaction types": Overview

Trans.Type	Short Description	Description
AG	Quotation	Quotation
AGEA	Web Auction Quotat.	Web Auction Quotation
AGIS	Quot. Internet Sales	Quotation in Internet Sales
AGWA	Web Auction Quotat.	Web Auction Quotation

1. Click on Details and get action profile. For example here Action profile configured is 'Quotation'.

Change View "Definition of transaction types": Details

Create Product Order Number
 Always Check Product ID
Profile for Altern. Identif.
Product Substitution Proced.

Profiles

Text Det. Procedure	ORDER001	Sales Order
Partner Determ.Proc.	00000001	Sales
Status Profile	<input type="text"/>	
Org. Data Prof.	000000000005	Org. Data Profile for Order (Header)
Partner Function ORG	Sold-To Party	
Date Profile	QUOTE001	
Action Profile	QUOTATION	
AP Procedure	<input type="text"/>	
Obj. Ref. Prof.	<input type="text"/>	
Ext. Ref. Profile	<input type="text"/>	
Aprv. Det. Procedure	<input type="text"/>	

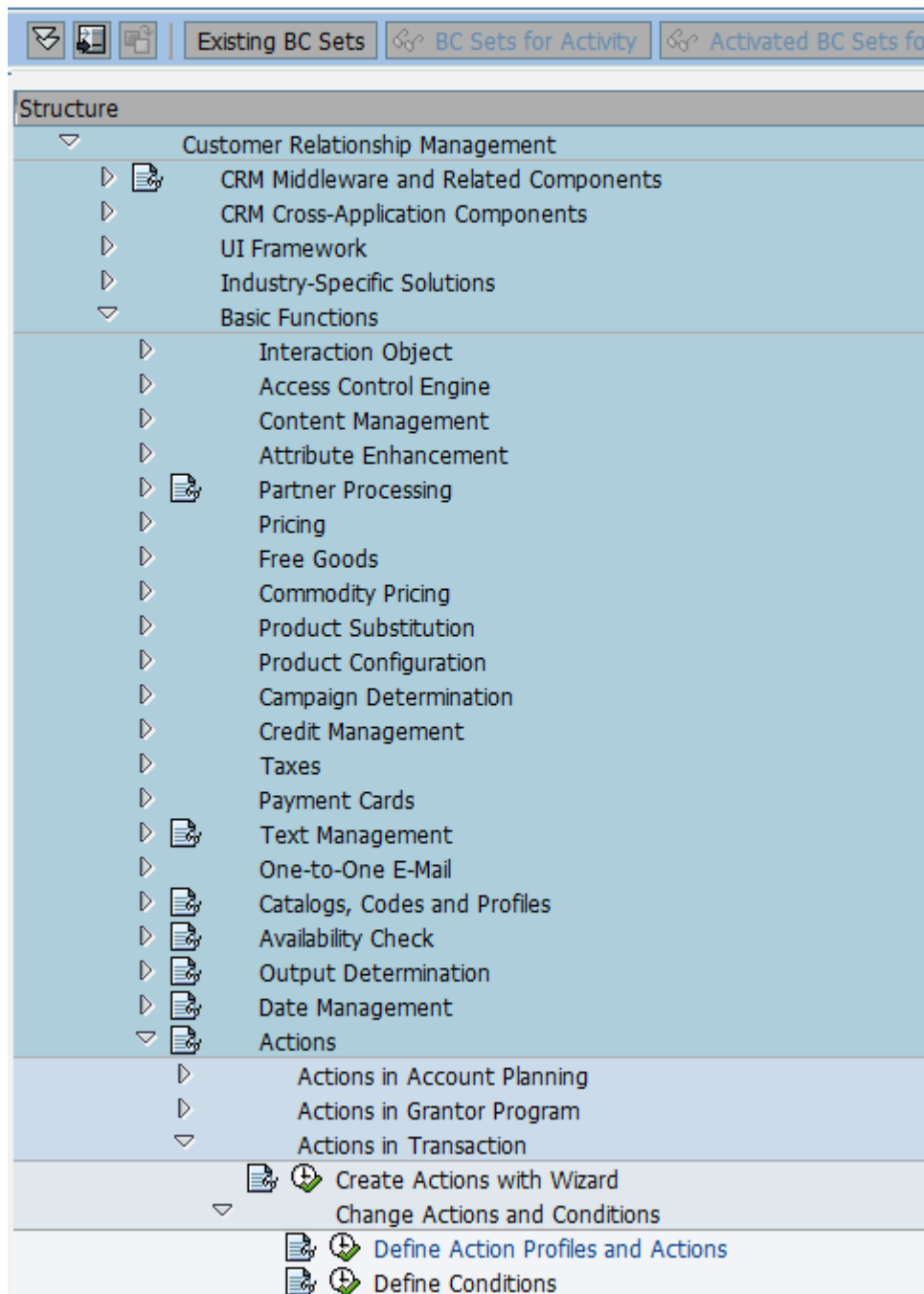
Transaction Numbering

No.Range Object	CRM_SALES	CRM Sales Trans.
Int.No.Range No	01	
Ext.No.Range No	14	
<input type="checkbox"/> Early No. Assgt		

- Now define a workflow action ZWFACTION that needs to be triggered as soon as quote status is changed for the above defined action profile QUOTATION as per below path:

Customer Relationship Management -> Basic Functions -> Actions -> Actions in Transaction -> Actions in Transaction

Display IMG



Display View "Action Profile": Overview

The screenshot shows the SAP Display View 'Action Profile: Overview'. The left pane shows the Dialog Structure with 'Action Profile' selected. The main area displays the following fields:

- Application: CRM_ORDER
- Description: CRM Order

Below these fields is a table with the following data:

Action Profile	Description
QUOTATION	Offer

Display View "Action Profile": Details

The screenshot shows the SAP Display View 'Action Profile: Details'. The left pane shows the Dialog Structure with 'Action Profile' selected. The main area displays the following configuration:

- Action Profile: QUOTATION Common Profile
- Description: Offer

The 'Action Profile' section is expanded to show the following details:

- Object Type**
 - Category of Object Type: Business Object Repository Persistent Class
 - Object Type Name: BUS2000115
- Date Profile: QUOTE001
- Used Common Profile:
- Context Class: CL_DOC_CONTEXT_CRM_ORDER

3. Create an Action Definition ZWFACTION for the action profile Quotation:

Change View "Action Definition": Overview

Dialog Structure

- Action Profile
 - Action Definition
 - Processing Type

Action Profile: QUOTATION
 Description: Offer

Action Definition	Description	Sort Order	Inactive
QUOTATION_RELEASE	Automatic Release of Offers	2	<input type="checkbox"/>
QUOTATION_RELEASE_WORKFLOW	Start Release Procedure for Offers	3	<input type="checkbox"/>
QUOTATION_REMINDER	Quotation Reminder	4	<input type="checkbox"/>
ZWFACTION	Workflow action		<input type="checkbox"/>
ZWFTEST	Work flow test for Quotation(offer)		<input type="checkbox"/>

Change View "Action Definition": Details

Dialog Structure

- Action Profile
 - Action Definition
 - Processing Type

Action Profile: QUOTATION
 Description: Offer

Action Definition: ZWFACTION
 Description: Workflow action

Action Definition
 Action Description
 Action Merging

Action Settings

Processing Time: Immediate Processing

Processing Times Not Permitted: No Restrictions

Sort Order For Display:

Schedule Automatically Changeable in Dialog

Delete After Processing Executable in Dialog

Display in Toolbox

Partner Determination for the Action

Partner-Dependent Partner Func.: Description:

Action Determination and Action Merging

Determination Technology: Determination Using Conditions that Can Be Transport...

Rule Type: Workflow Conditions

Action Merging: Set Highest Number of Processed Actions

Sort Fields for the Execution of Actions

Sort Field 1: Sort Field 2: Sort Field 3:

4. Create Processing Type ZWFACTION for the action definition ZWFACTION having method ZWORKFLOW.

Create a BADI Implementation ZCRFS_BI_WFACTION for the BADI Definition EXEC_METHODCALL_PPF having filter value will be as created above method ZWORKFLOW :

The screenshot displays the SAP Business Add-In Builder interface for configuring a BADI Implementation. The main window title is "Business Add-In Builder: Change Implementation ZCRFS_BI_WFACTION".

Implementation Details:

- Implementation Name: ZCRFS_BI_WFACTION (Active)
- Implementation Short Text: BADI for Execution of Actions
- Definition Name: EXEC_METHODCALL_PPF
- Runtime Behavior: Implementation will be called

Properties Tab:

General Data:

- Package: ZSACHIN
- Language: EN English
- Last Changed By: STHADANI
- Last change: 04/24/2012 07:48:55
- Last activated by: STHADANI
- Activated on: 04/24/2012 07:48:55

Type:

- Within SAP
- Multiple Use
- Filter-Depend. Filter Type: PPFDFLTVAL Filter Value for BADI EXEC_METHODCALL_PPF
- Enhanceable

Filter Values Table:

Method	Short text Method
ZWORKFLOW	

Implementation Edit Goto Utilities Environment System Help

Business Add-In Builder: Display Implementation ZCRFS_BI_WFACTION

Definition Documenta Documentation

Implementation Name: ZCRFS_BI_WFACTION Active

Implementation Short Text: Workflow implementation

Definition Name: EXEC_METHODCALL_PPF

Runtime Behavior: Implementation will be called

Properties Interface

Interface name: IF_EX_EXEC_METHODCALL_PPF

Name of implementing class: ZCL_IM_CRFS_BI_WFACTION

Method	Implement..	Description
EXECUTE	ABAP Co...	Execution of Processing Logic

Default implementation class

Example implementation class

- To retrieve the status of Quote, first create a custom Bus Object for example ZBUS200114 for Bus Object BUS2000114 through which GUID of the quote will be passed to the workflow and the create the workflow to be triggered having this custom business object ZBUS200114 passed as a container element.

Now, Double click on Execute Method and retrieve the status of Quote passed.

```
* Object reference declaration section . . .
DATA: lr_objref TYPE REF TO cl_doc_crm_order_h,
      lv_objkey   TYPE sweinstcou-objkey,
      lv_objnr    TYPE crm_jest-objnr,
      lv_objnrc   TYPE crm_jsto-objnr,
      lv_objtype  TYPE swetypecou-objtype,
      lv_obtyp    TYPE jsto-obtyp,
      lv_stsma    TYPE jsto-stsma,
      lv_stonr    TYPE tj30-stonr.

      it_status   TYPE TABLE OF jstat,
      wa_status   TYPE jstat.

* Retrieve the GUID for the Quote . . .
lr_objref ?= io_appl_object.
lv_objnr  = lr_objref->get_crm_obj_guid( ).

* Store GUID for use in workflow data retrieval and raising event . . .
lv_objkey = lv_objnr.
lv_objnrc = lv_objnr.
lv_objtype = 'ZBUS200114'.

* Retrieve the status of the Quote from the buffer . . .
CALL FUNCTION 'CRM_STATUS_READ'
  EXPORTING
    client      = sy-mandt
    objnr       = lv_objnrc
  IMPORTING
    obtyp       = lv_obtyp
    stsma       = lv_stsma
    stonr       = lv_stonr
  TABLES
    status      = it_status
  EXCEPTIONS
    object_not_found = 1.
```

- Read above status table it_status to know the status for which work item to be created in the work list. For example, if we want to create a work item in work list when status is set 'In process' viz. status = 'E0003' for CRM_ORDER as per above configuration, trigger the workflow when status = 'E0003':

Read table it_status into wa_status with key STAT = 'E0003'.

If sy-subrc eq 0.

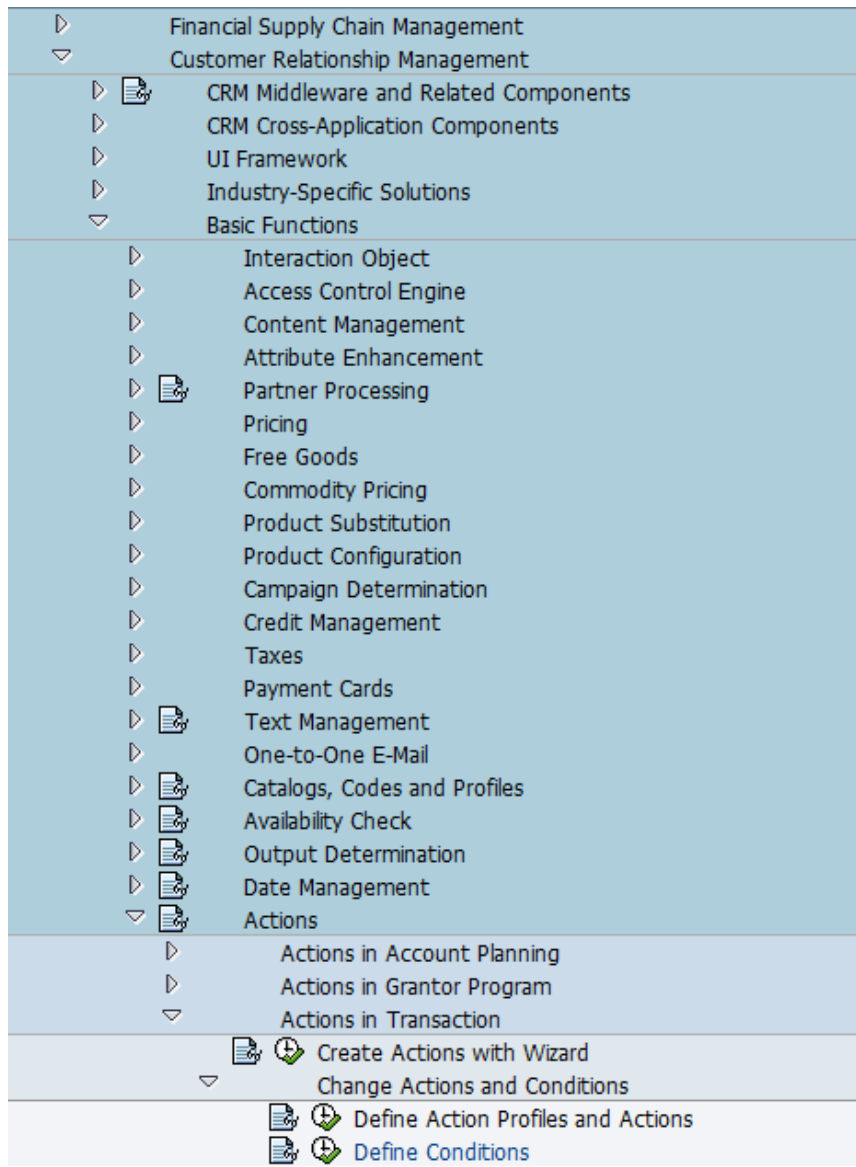
```
CALL FUNCTION 'SWE_EVENT_CREATE'
  EXPORTING
    objtype      = lv_objtype
    objkey       = lv_objkey
```

```

event          = 'Manual_Task'
TABLES
event_container = lt_eventcontainer
EXCEPTIONS
objtype_not_found = c_not_found.
Endif.

```

7. Once Action Profiles and Actions are defined, Goto Define Conditions and For the Action “Quotation” , define the start condition :



Conditions for Actions: Change

Technical Names | Action Definitions | Schedule Conditions | Start Conditions

Scheduling of Actions	Numb...
OUTL_AGREEMENT_FS_ITE	0
OUTL_AGREEMENT_SERVIC	0
PARKING_PERMIT	2
PARKING_PERMIT_WSSO	4
PHA_BUSINESS_ACTIVITY_	2
PSL_FIX	4
PSL_H	2
PSL_I	1
QUOTATION	8
QUOTATION_IS	5
...	...

Action Definition	No.	ProcessTyp	Proc. Type
QUOTATION_COMPLETE	1	Method call	Complete Doc
QUOTATION_FEEDBACK	1	Method call	Generate Folk
QUOTATION_PRINT	1	Print	Print Output l
QUOTATION_RELEASE	1	Method call	Set Document
QUOTATION_RELEASE_WORKFLOW	1	Method call	Generate a W
QUOTATION_REMINDER	1	Method call	Generate Folk
ZWFACTION	1	Method call	ZWORKFLOW

Overview | Processing Details | Schedule Condition | Start Condition

Schedule

Schedule Condition: No Condition (Seen as Fulfilled)
 Schedule Automatically
 In the Worklist

Action Merging: Any Number of Processed Actions Allowed

Time of Processing

Start Condition: When Order is Complete
 Time of Processing: Immediate Processing

Action Definition

Action definition is active
 Default Settings from Action Definition

Changes

Assigned Processings
 Method Call

Creation of the workflow for the work item trigger in Work list:

- Use Transaction PFTC to create a workflow template task:

Task: Maintain

Task type: Workflow Template

Task: 90000004 ZFSWFPRODA...

Name: Test Trigger Workflow

Workflow Template: Display

Workflow template 90000004 ZFSWFPRODA...

Name Test Trigger Workflow

Package ZSACHIN Appl. Component

Basic data Description Container Triggering events SAPphone

Name

Abbr. ZFSWFPRODA...

Name Test Trigger Workflow

Release status Implemented

Work Item Text

Work item text Test Trigger Workflow

Workflow Definition

Workflow definition [Workflow Builder](#)

9. Specify any event as a triggering event for the workflow. For example, here we are considering "MANUAL_TASK" as a triggering event for the workflow.

Workflow Template: Display

Workflow template 90000004 ZFSWFPRODA...

Name Test Trigger Workflow

Package ZSACHIN Appl. Component

Basic data Description Container Triggering events SAPphone

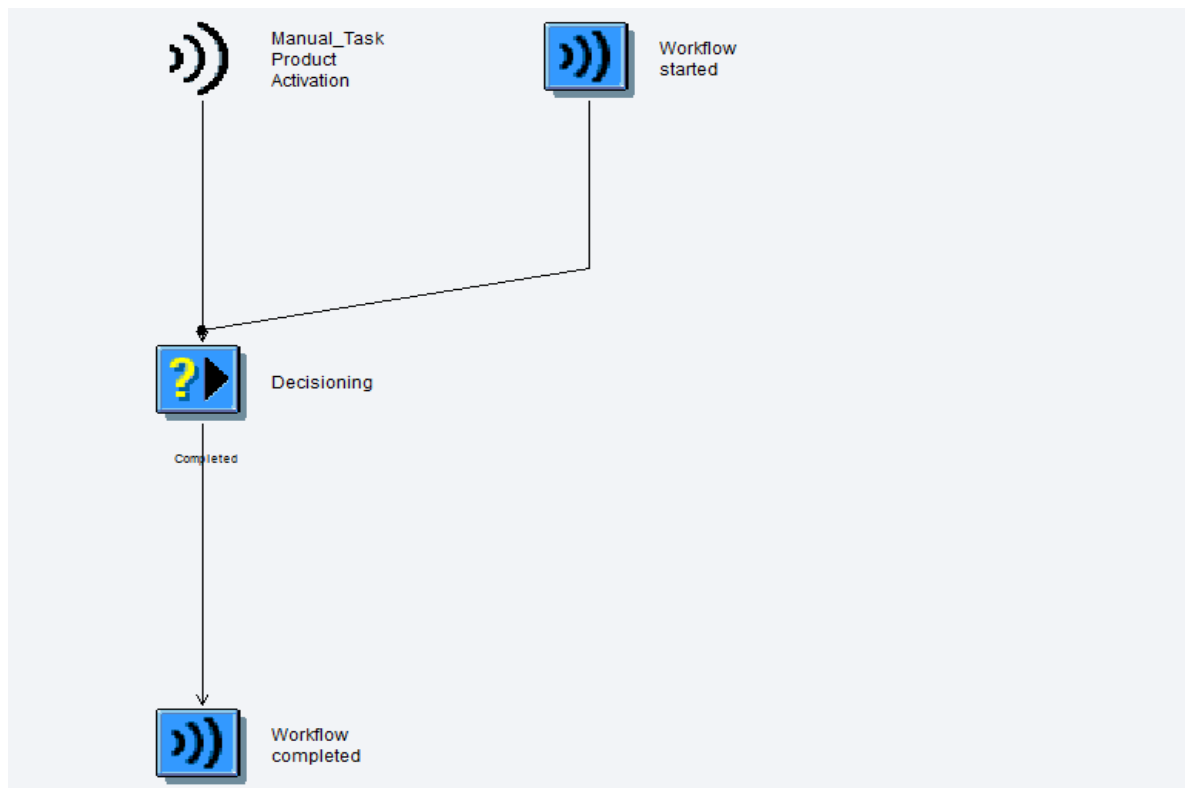
Standard events

	Binding ...	Object Category	Object Type	Event	Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BOR Object Type	ZBUS200114	MANUAL_TASK	CRM Financ. Contract Ma...
<input type="checkbox"/>	<input type="checkbox"/>				

10. Create a Custom BOR object ZBUS200114 viz. copy of Std Bus Object BUS2000114 to pass the Quotation value as a key field of this Bus Object and define triggering event MANUAL_TASK as an event for this bus object.

ZFinanceContractCRM.GET_CONTEXTS	Read Action Profiles
ZFinanceContractCRM.GET_MODE	Read Action Mode
ZFinanceContractCRM.SystemstatusSet	Set System Status
Events	
ZFinanceContractCRM.CreditcheckTobeProcessed	Credit Check to be Processed
ZFinanceContractCRM.CreditcheckCompleted	Credit Check Complete
ZFinanceContractCRM.Created	Transaction was created persistently
ZFinanceContractCRM.Deleted	Transaction was Deleted Persistently
ZFinanceContractCRM.Cancelled	Transaction Rejected
ZFinanceContractCRM.PostprocessingStatusSet	Status Set: For Postprocessing
ZFinanceContractCRM.Manual_Task	Manual_Task Product Activation

11. In the workflow builder , create a Decisioning task :



12. Specify the agents as Workflow Initiator so that workflow should be received by the user who initiates the workflow.

User Decision 000008 Decisioning

Decision Details Control Outcomes Notification Latest End Requested Start

Title Please take a decision

Parameter 1 Parameter 2

Parameter 3 Parameter 4

Agents

Expression & WF_INITIATOR& Initiator of Workflow Instan...

Excluded

Decision Options

Decision Texts	Outcome Name
Task Completed	Completed

Standard Task: Display

Standard task 90000017 ZFSWT_TSDEC

Name Generic decision task

Package ZSACHIN Appl. Component

Basic data Description Container Triggering events Terminating events

Name

Abbr. ZFSWT_TSDEC

Name Generic decision task

Release status Released

Work Item Text

Work item text Decide Between the Alternatives Available

Object method

Object Category BOR Object Type

Object Type ZBUS200114 CRM Financ. Contract

Method DISPLAY Display Object

Synchronous object method

Object method with dialog

Execution

Background processing Executable with SAPforms

Confirm end of processing

13. In the triggering event, specify the Triggering event 'MANUAL_TASK' which is defined earlier in BOR Object 'ZBUS200114' and activate the binding.

Standard task	90000017	ZFSWT_TSDEC
Name	Generic decision task	
Package	ZSACHIN	Appl. Component

Basic data Description Container **Triggering events** Terminating events Default rules

Standard events

Binding	Object Category	Object Type	Event	Name
<input checked="" type="checkbox"/>	BOR Object Type	ZBUS200114	MANUAL_TASK	CRM Financ. Contract Ma...
<input type="checkbox"/>				

Based on above configuration as per step 9 , as soon as quote is changed to - "In process " - 'E0003', CRM action ZWFACTION will get trigger which will trigger workflow using event 'Manual_Task'.

Test of triggering work item in Work list as soon as Quote Status is changed

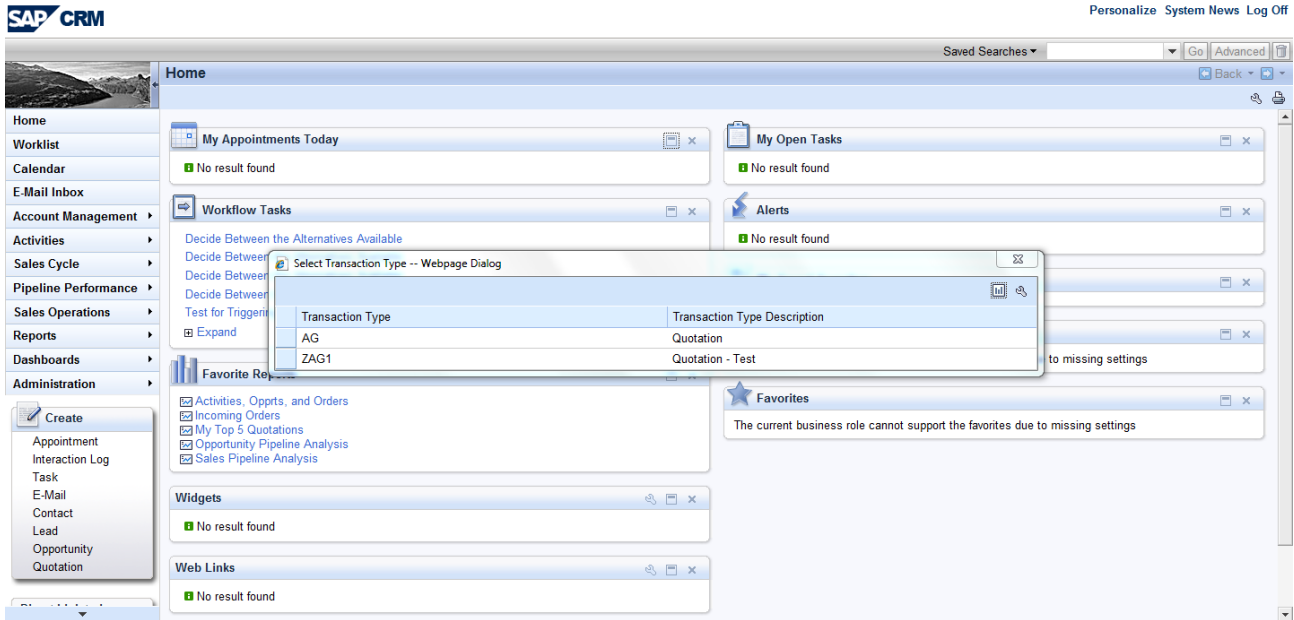
Create a new quotation having transaction type 'AG' as configured above :

Quotation: New Back

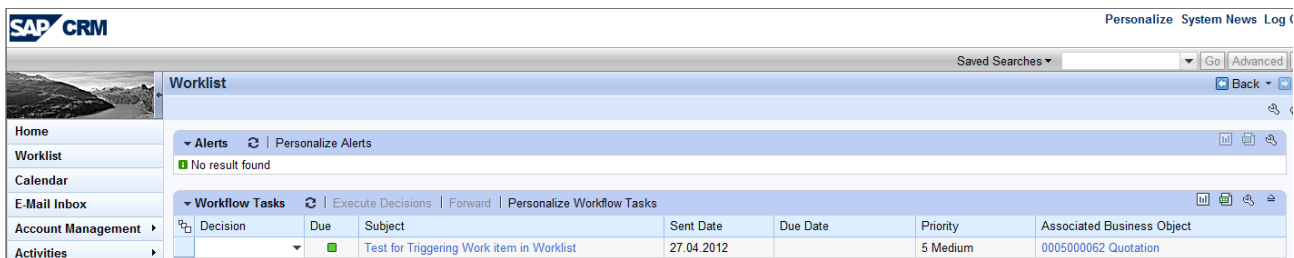
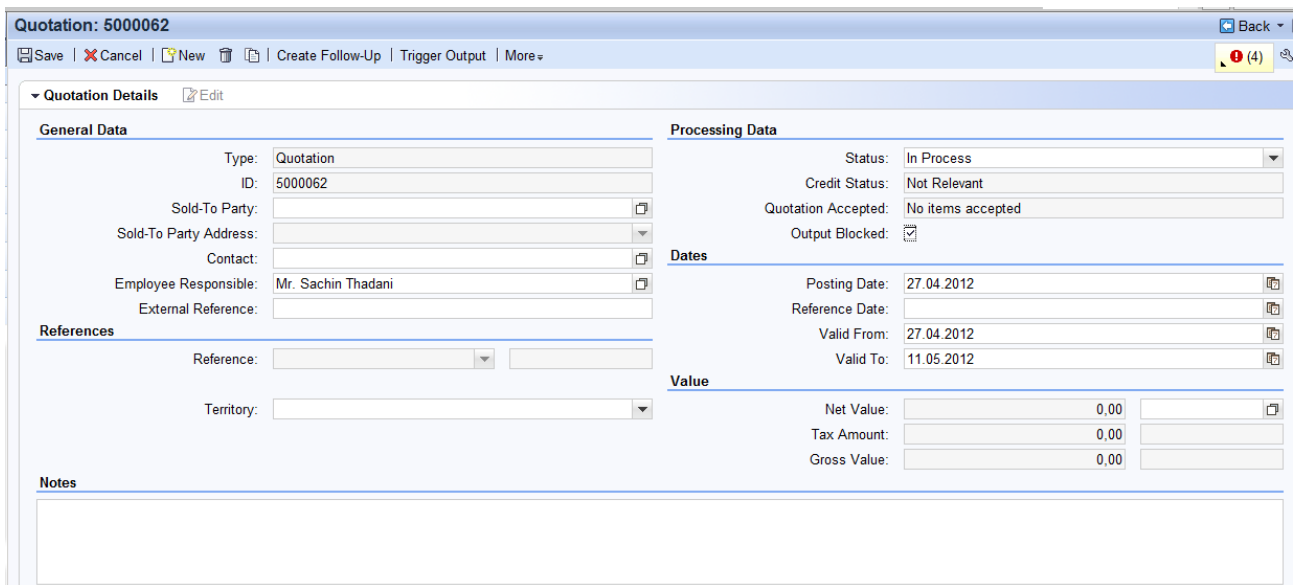
Save | Cancel | New | Create Follow-Up | Trigger Output | More

Quotation Details Edit

<p>General Data</p> <p>Type: Quotation</p> <p>ID: <input type="text"/></p> <p>Sold-To Party: <input type="text"/></p> <p>Sold-To Party Address: <input type="text"/></p> <p>Contact: <input type="text"/></p> <p>Employee Responsible: Mr. Sachin Thadani</p> <p>External Reference: <input type="text"/></p> <p>References</p> <p>Reference: <input type="text"/></p> <p>Territory: <input type="text"/></p> <p>Notes</p>	<p>Processing Data</p> <p>Status: Open</p> <p>Credit Status: Not Relevant</p> <p>Quotation Accepted: No items accepted</p> <p>Output Blocked: <input type="checkbox"/></p> <p>Dates</p> <p>Posting Date: 27.04.2012</p> <p>Reference Date: <input type="text"/></p> <p>Valid From: 27.04.2012</p> <p>Valid To: 11.05.2012</p> <p>Value</p> <p>Net Value: 0.00</p> <p>Tax Amount: 0.00</p> <p>Gross Value: 0.00</p>
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Change the Quote status to 'In Process' and it will trigger the work item in the worklist :



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For more information, visit the [ABAP homepage](#)

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