

Approval Workflow for CRM Marketing Creation and Approval



Applies to:

CRM 6.0 and above. For more information, visit the [Customer Relationship Management homepage](#).

Summary

Through this document the reader will be able to get basic idea about the workflow function and its application in CRM marketing.

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Author Bio



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Scope

This document gives the usage of workflow with basic steps for the CRM Marketing plan approval.

Target Audience

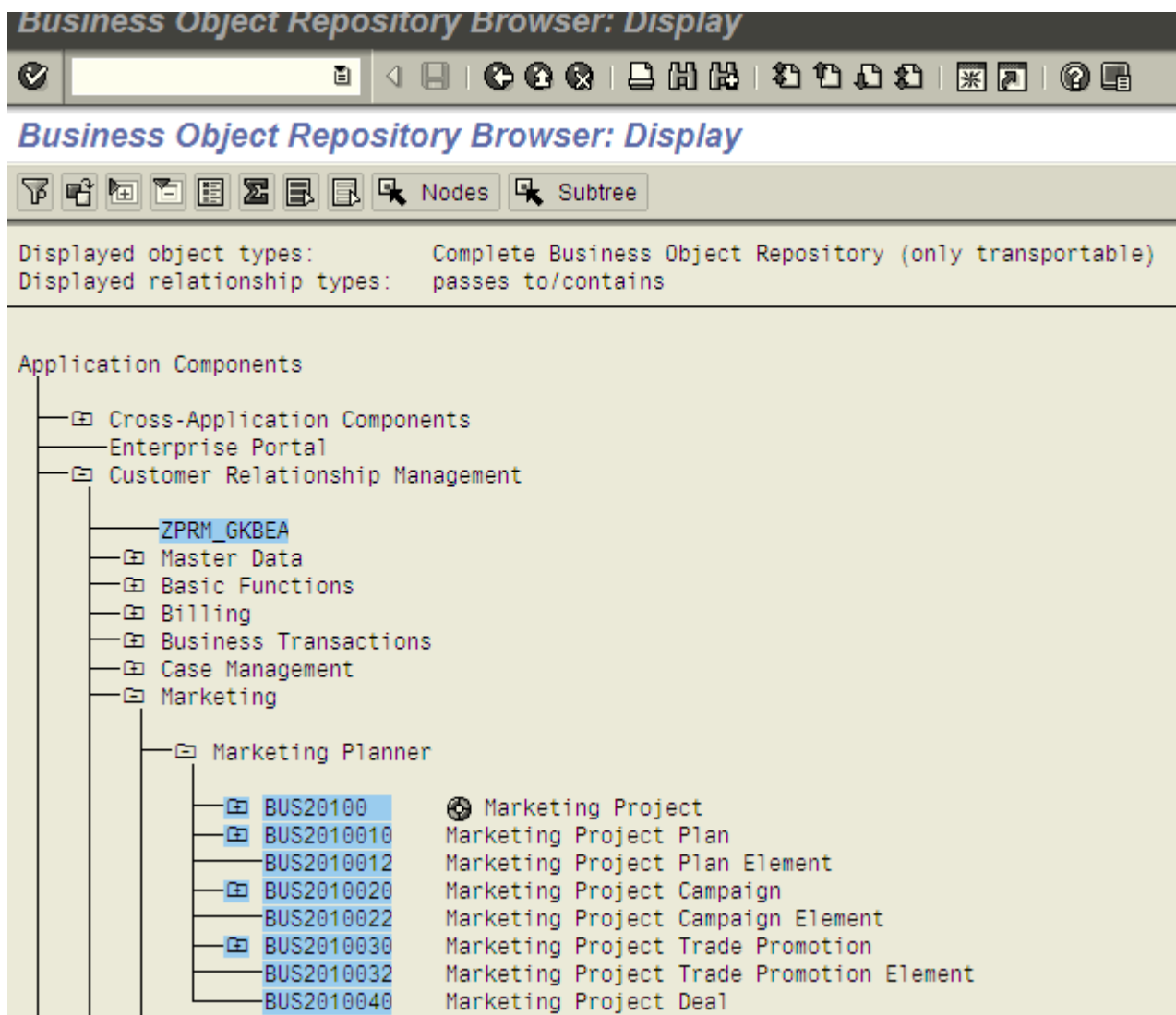
The document is intended for ABAP and CRM Consultants at all levels trying to learn workflow. Prior Knowledge of workflow development and CRM development environment is recommended.

Requirement

The requirement is during the creation of marketing plan by the employee, the workitem should be created in the inbox of his manager for the approval similarly when the manager approves or rejects it should be informed to the employee also.

Creation of Workflow

First identify the business object that is going to trigger for CRM Marketing plan in SW01 transaction and go to business object repository.

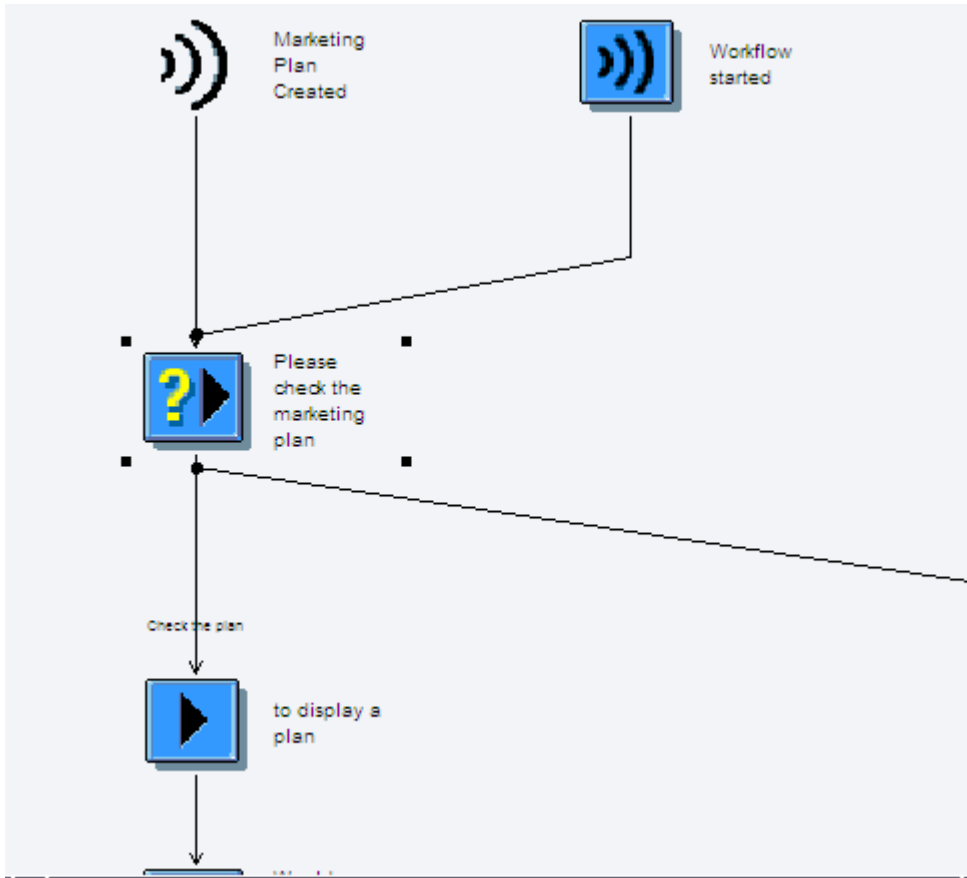


For our case the business object is BUS2010010.

Start development of workflow in SWDD transaction:

Step1:

First create a decision step for the manager approval to see the plan.



Maintain the decision texts that is required.


Assign the agent let us consider CFP15 is the manager

The screenshot shows the SAP Decision Manager configuration for a decision titled "Please check the marketing plan". The interface includes tabs for "Decision", "Details", "Control", "Outcomes", "Notification", "Latest End", and "Requested Start".

Agents: The "Agents" section shows "US User" assigned to "CFP15".

Decision Options	
Decision Texts	Outcome Name
You need to check the plan	Check the plan
No i dont need to check the plan	Dont check the plan

Now the major step where we need to assign the business object and method for the task.

Press the button  at the menu bar and assign as shown in the below.

The screenshot shows the SAP Task Manager configuration for a task titled "Please check the marketing plan". The interface includes tabs for "Basic Data", "Description", "Start Events", "Start Forms", "Version Overview", and "Function Group".

Basic Data:

- Abbreviation: CRM2009
- Description: from CRM marketing team
- Release status: Not defined
- SAPphone: Not suitable for SAPphone

Work Item Text: Please check the marketing plan

Version-INdependent (Task) Version-Dependent (Current Workflow Version)

Basic Data Description **Start Events** Start Forms Version Overview

Press this button for bindings

Workflow start using triggering events

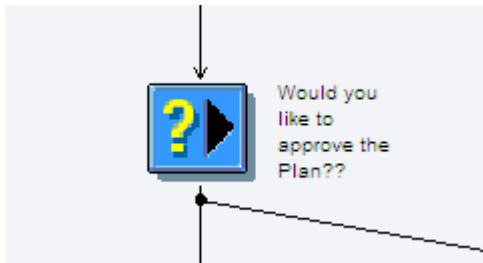
A...	B...	C...	Cate...	Object Type	Event of the object
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BO	BUS2010010	CREATED
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

How do you maintain the start events (inclusive start conditions)?

Enter the event that is to start the workflow and activate it. Only active type references are considered when events are evaluated.

In addition, you can define a start condition for every event that has to be met for the workflow to be started. Alternatively, you can create your own check function module that will check the start of the workflow.

Create a step for the approval of manager now



User Decision 000020 Would you like to approve the Plan??

Decision Details Control Outcomes Notification Latest End Requested Start

Title Would you like to approve the Plan??

Parameter 1 Parameter 2

Parameter 3 Parameter 4

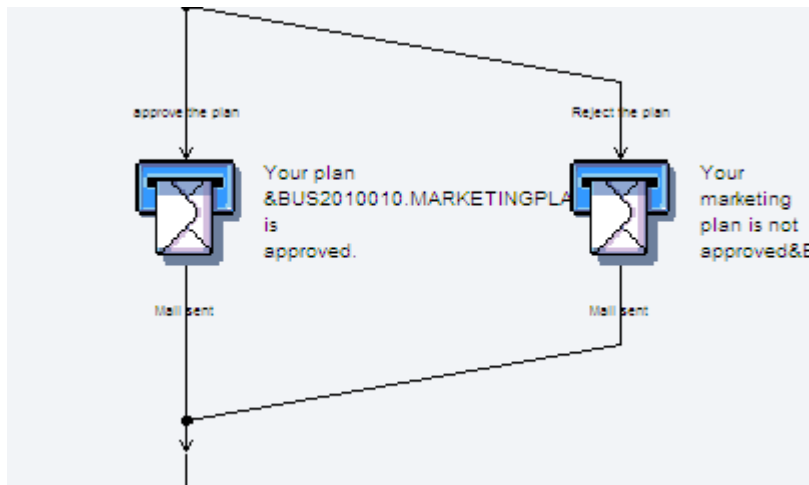
Agents

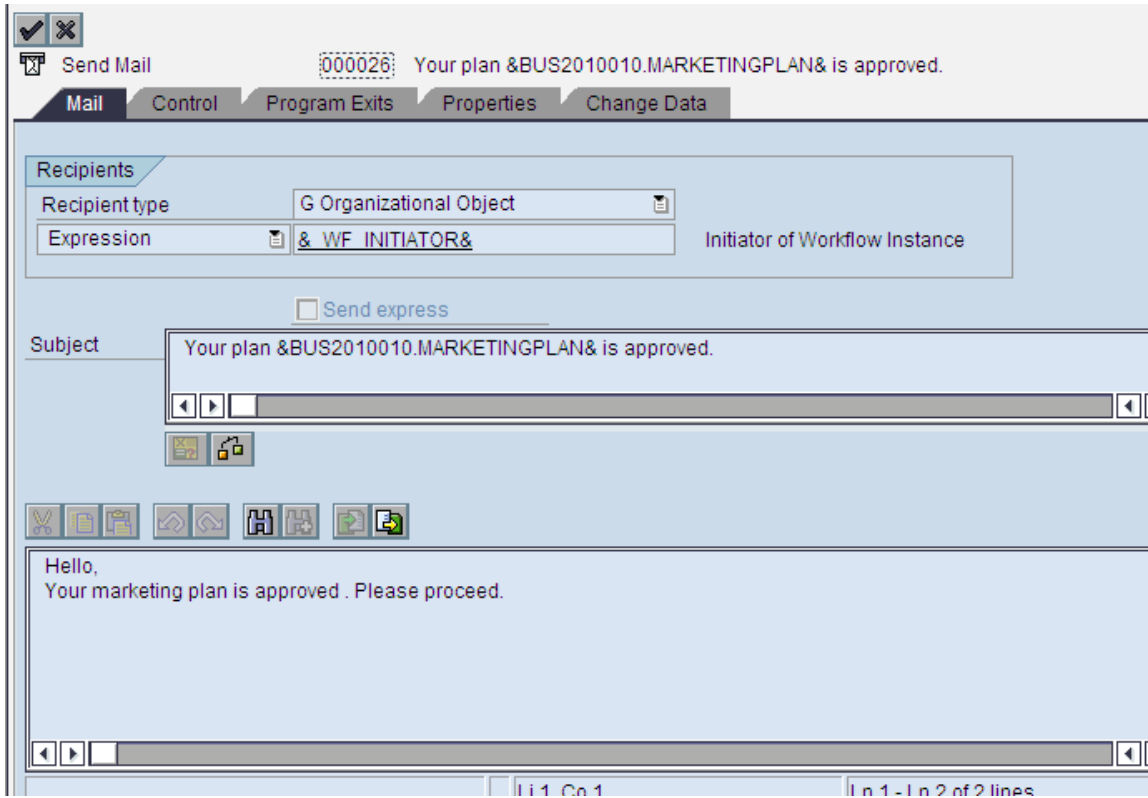
US User CFP15 CFP15

Excluded

Decision Texts	Outcome Name
Approve	approve the plan
Reject	Reject the plan

If the manager approved/Rejected the plan then the mail will be sent to the employee.

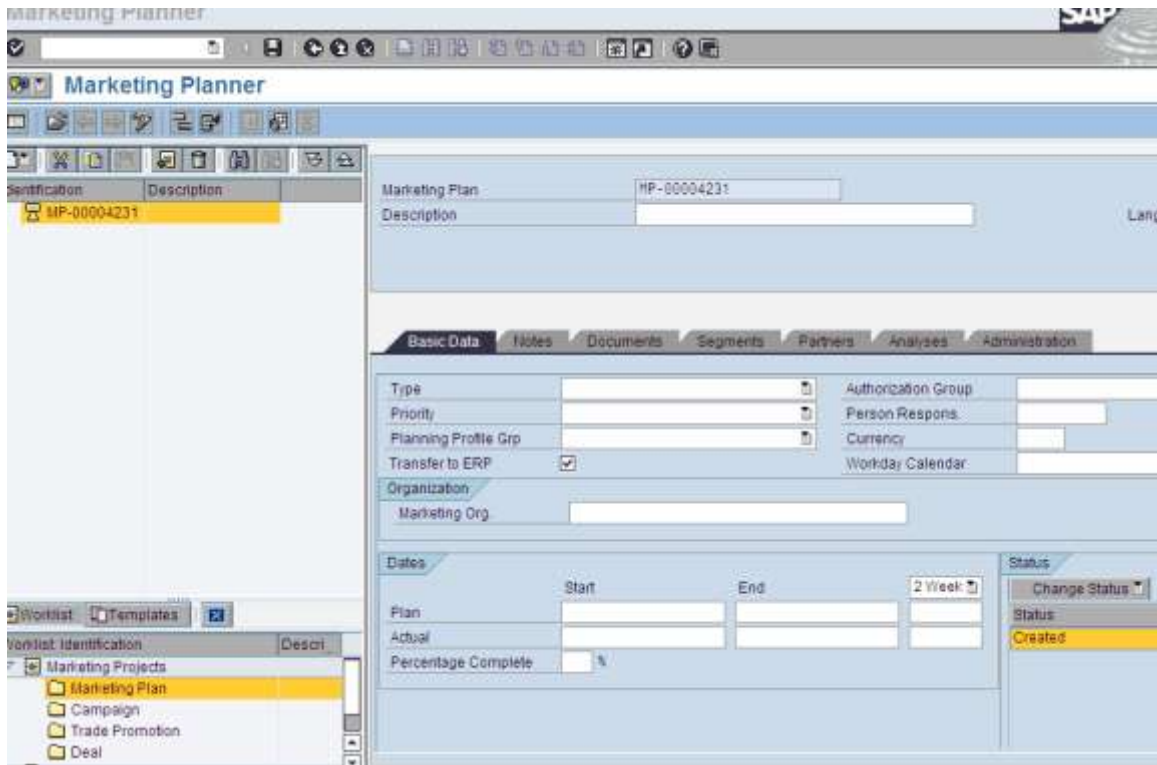




This is the development part.

Testing

Creating marketing plan in CRM_MKTPL transaction



When the status is created and saved the mail is sent to manager of the marketing .
Now a work item will be created in the inbox of VP marketing (Transaction : SBWP).

After executing the work item:

Decision Step in Workflow

Workflow Create

Please check the marketing plan

Choose one of the following alternatives

You need to check the plan

No I dont need to check the plan

Cancel and keep work item in inbox

Description
Choose one of the decision options given. This completes the processing of this step.
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also create your own attachments
If you choose Cancel, the user decision remains in your inbox for processing

Objects and attachments
No attachments or objects

When the first button is pressed he can check the plan:

Marketing Plan: MP-9994231

Description: _____ Language: _____

Basic Data | Notes | Documents | Segments | Partners | Analyses | Administration

Type: _____ Authorization Group: _____
 Priority: 0 Person Respons: _____
 Planning Profile Grp: _____ Currency: _____
 Transfer to ERP: Workday Calendar: _____

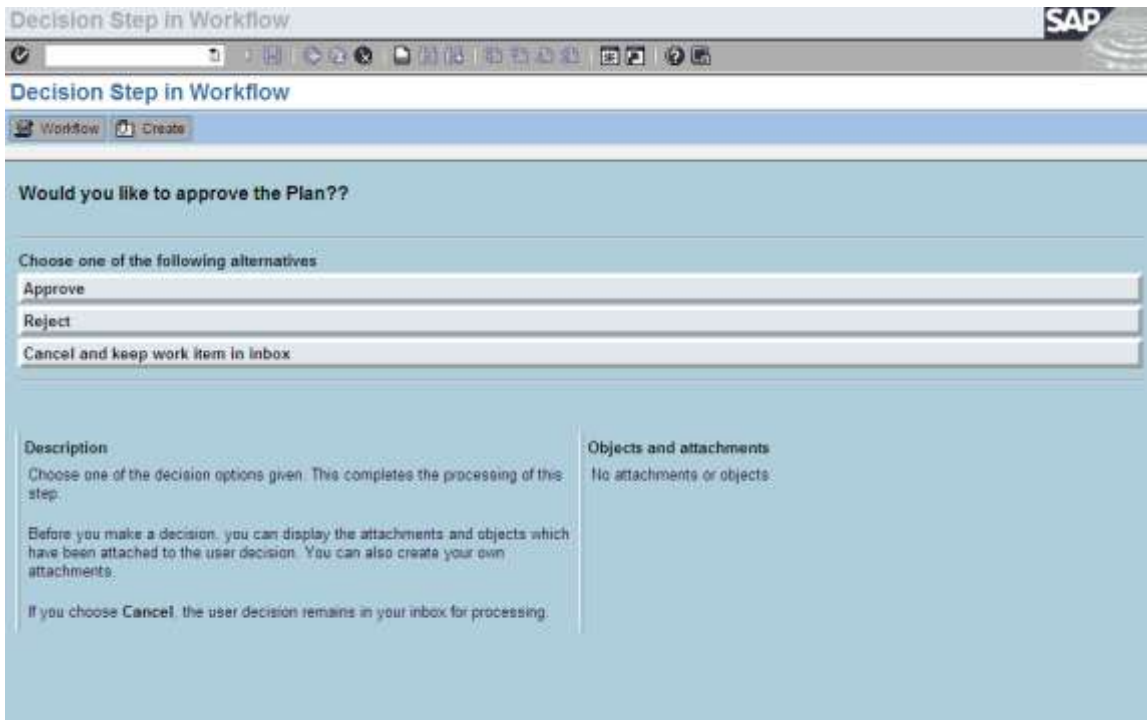
Organization
 Marketing Org: _____

Dates

	Start	End	
Plan			2 Week
Actual			8:58
Percentage Complete	0 %		

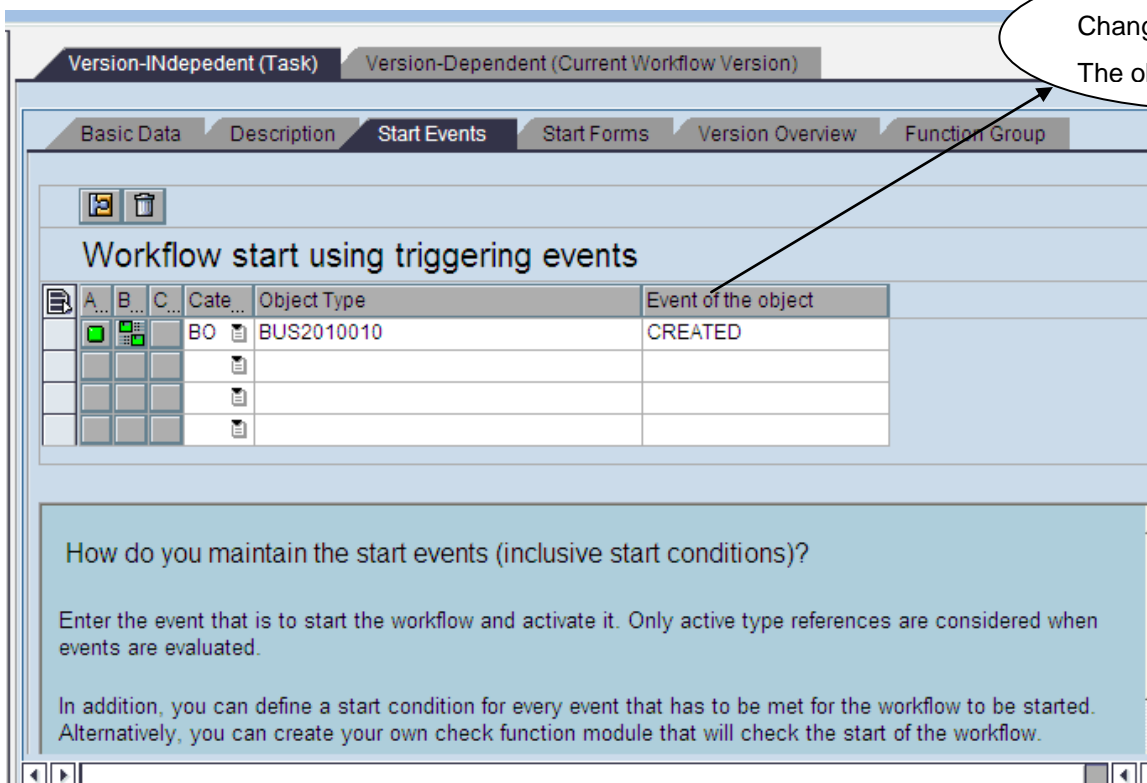
Status
 Change Status: _____
 Status: **Created**

After checking the plan pressing the back button :



When he approves or rejects the mail will be sent to the substitute accordingly.

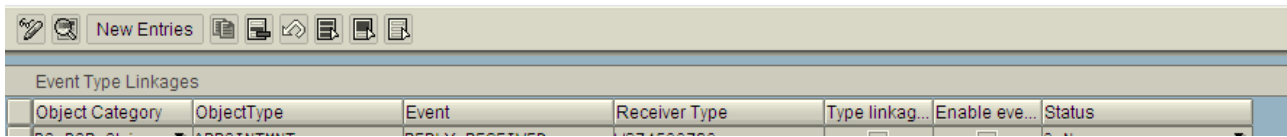
Similarly we can design the work flow for different statuses : Released/Approved etc.



Change the event of The object

To deactivate any other workflows for the same business object go to SWETYPV transaction and remove the tick mark from TYPE LINKAGE column for the corresponding workflow and business object.

Change View "Event Type Linkages": Overview



Object Category	ObjectType	Event	Receiver Type	Type linkag...	Enable eve...	Status
				<input type="checkbox"/>	<input type="checkbox"/>	

Related Content

[Defining a Substitute During a User's Absence](#)

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