

New activity notification

Notify an employee when they become an activity participant

Version 7.17



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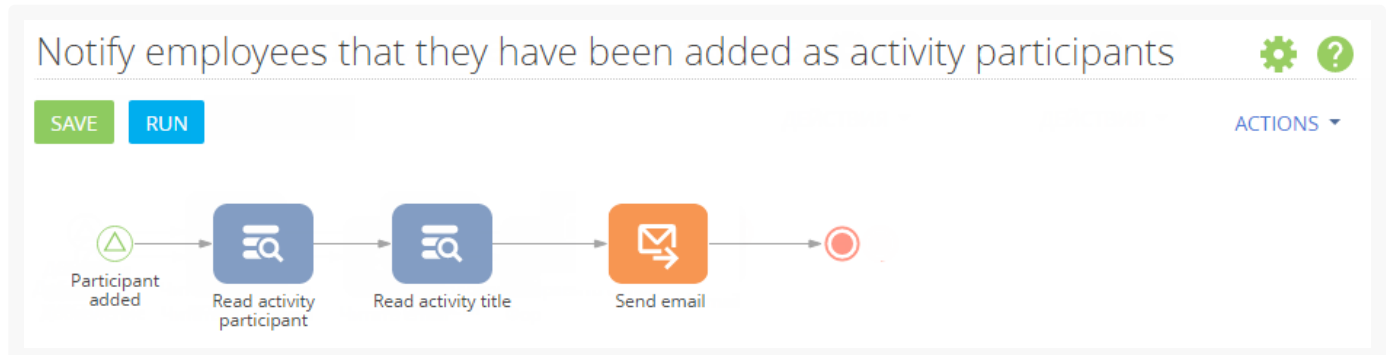
PRODUCTS: ALL CREATIO PRODUCTS

Example. Create the following business process: an email is sent to an employee that was added to the list of participants in the activity.

Business process diagram (Fig. 1) elements:

1. Incoming signal for adding an activity participant - when a new participant is added to the activity, the signal is activated and the business process is started.
2. Reading the Id of the added activity participant record - getting about the new activity participant information for later use in the process.
3. Reading the activity header - retrieving activity data that will be used in the preconfigured template.
4. Sending email - notifying the contact that they were added to the activity.

Fig. 1 The "Employees added as activity participants notification" business process



To do this:

1. Place the [*Signal*] element of the [*Initial events*] group on the schema — "Participant added". The element will be activated when a contact is added on the [*Participants*] detail of the activity.
2. Set up the signal parameters:
 - a. In the [*Object*] field, set "Activity participant".
 - b. In the [*What event should happen?*] field, select "Add record".
3. Add two [*Read data*] elements of the [*System actions*] group.
4. Set up the "Read activity participant" element parameters to read data from the activity participant added record (Fig. 2):
 - a. In the [*Which data read mode to use?*] field, select "Read the first record in the selection".

- b. In the [*Which object to read data from?*] field, select "Activity participant".
- c. In the [*How to filter records?*] area, set the filter "Id = Participant added.Record ID". To do this, click <Add condition>, select the "Id" column, then in the appeared menu, select [*Compare with parameter*]. In the opened window, select the [*Record ID*] parameter of the "Participant added" element.

Fig. 2 The "Read activity participant" element properties

The screenshot shows the configuration window for the "Read activity participant" element. It is divided into several sections:

- Which data read mode to use?**: Read the first record in the selection.
- Which object to read data from?**: Activity participant.
- How to filter records?**:
 - Actions: AND (checked).
 - Condition: Id = Participant added.Unique identifier of record (checked).
 - + Add condition
- How to sort records?**: + Add
- Which columns to read data from?**: All columns.

5. Set up the "Read activity title" element parameters to read the activity title, to which a participant has been added (Fig. 3):

Fig. 3 The "Read activity title" element properties

Which data read mode to use?

Read the first record in the selection

Which object to read data from?

Activity

How to filter records?

Actions ▾

AND

Id =
Read activity participant.First
item of resulting
collection.Activity

+ Add condition

How to sort records?

+ Add

Which columns to read data from?

Selected columns only

Subject

+ Add column

- a. In the [*Which data read mode to use?*] field, select “Read the first record in the selection”.
 - b. In the [*Which object to read data from?*] field, select “Activity”.
 - c. In the [*How to filter records*] area, set up filter "id = Read activity participant.First element of the resulting collection.Activity". To do this, click <Add condition>, select the “Id” column, then in the appeared menu, select [*Compare with parameter*]. In the opened window, select the "Activity" parameter of the "Read activity participant" element.
 - d. In the [*Which column values should be read?*] field, select “Only selected columns" and select the “Title” column.
6. Add the “Send e-mail” element of the [*System actions*] group and set the following parameters (Fig. 4):
- a. In the [*From*] field, specify the return address in the message. To do this, select [*Select from lookup*] in the parameter value menu, then in the [*Synchronization with mailbox settings*] lookup, select one of the configured email accounts.
 - b. In the [*To*] field, specify the email of the recipient. In the parameter value menu, click the [*Process element*], select the [*Read contact data*] element, and the [*Email*] parameter.
 - c. In the [*What is the message?*] field, select “Template message”.
7. Select the existing template in the [*Template message*] field. The [*Subject*] field is populated automatically.

8. Select "Send email automatically" in the [*How is the message sent?*] field.

Fig. 4 The "Send email" element properties

From*
[#Lookup.Mailbox synchronization settings.e...]

To +
[#Read activity participant.First item of resultir]

What is the message?
Template message


Template message*
Template - activity participant added

Subject*
You have been added as participant of the ac..

```
[#Recipient.Solution*],
[#Document.Type.Name*], [#Document.Number*] from [#Document.Date*] requires approval by user or role "
[#Approver.Name*]",
*DefaultIfEmpty*
Owner: [#Document.Owner.Contact Name*]
*DefaultIfEmpty*#*DefaultIfEmpty*#
Account: [#Document.Account.Account Name*]
*DefaultIfEmpty*#
*DefaultIfEmpty*#
Contact: [#Document.Contact.Contact Name*]
```

How is the message sent?
Send email automatically

Importance
Medium

9. After creating the process elements, connect each element with the next one by dragging the  element in the upper right corner of the selected process element.
10. Save the created business process.
As a result of the business process, an email is sent to an employee that was added to the list of participants in the activity.