

# Workflow Automation in Business Process Management

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**Abstract:** *Workflow automation is an approach to making the flow of tasks, documents and information across work related activities perform independently in accordance with defined business rules. Our project defines making the automation by scheduling or customizing depends on the organization rules. Workflow rule area implementing set of actions (email notifications, tasks and field updates) that are executed when certain specified conditions are met. These rules automate the process of sending email notifications, assigning tasks and updating certain fields of a record when a rule is triggered as well as automatic meet scheduler, contact with organization members is possible as the specified conditions are met.*

**Keywords:** Flow of task, Work Related Activity, Organization Rules, Set of Actions

## I. INTRODUCTION

A workflow consists of an orchestrated and repeatable pattern of activity, enabled by the systematic organization of resources into processes that transform materials, provide services, or process information. It can be depicted as a sequence of operations, the work of a person or group, the work of an organization of staff, or one or more simple or complex mechanisms. From a more abstract or higher-level perspective, workflow may be considered a view or representation of real work. The flow being described may refer to a document, service, or product that is being transferred from one step to another. Workflows may be viewed as one fundamental building block to be combined with other parts of an organization's structure such as information technology, teams, projects. By automate the workflow to increase the productivity and reduce the time to make this workflow in day to day life of an organization. Workflow helps the stream line and automate the repeatable process occurs in an organization

## II. DESIGN ISSUES

If you are busy with one client and cannot attend another client or you don't have enough staff to address customers when needed, you'll be losing out on satisfying customers. New research suggests that as high as 82% of customers will never get back to you following an unsatisfying customer experience. It just doesn't end here. Unhappy customers are more likely to tell others about it — 95% of consumers who have had negative customer experiences have told others about it, compared to the 46% who have shared positive experiences. Did you know that to solve this problem, a large percentage of companies are using ZOHO for their Sales and marketing and increasing their sales by 44%? ZOHO largely deals with customer management, so its application purpose is to serve customers with better attention and quick response. So what makes it so reliable? Here's an extensive list of problems that ZOHO can solve for your business

## III. WORK FLOW IMPLEMENTATION

### 3.1 Criteria

Defining criteria helps control the workflow process. You can set one or more criteria to meet the required conditions to trigger a workflow. You can configure multiple criteria for each workflow process within a specific form. Additionally, using simple AND or OR operators, a pattern can be specified. The criteria will be evaluated based on the specified criteria pattern. Using a criteria pattern can help in reducing the number of required approval workflows. The following four use cases would help in clearly understanding how criteria can be set, and how a criteria pattern can be utilized in workflows.

### 3.2 Creating Workflow

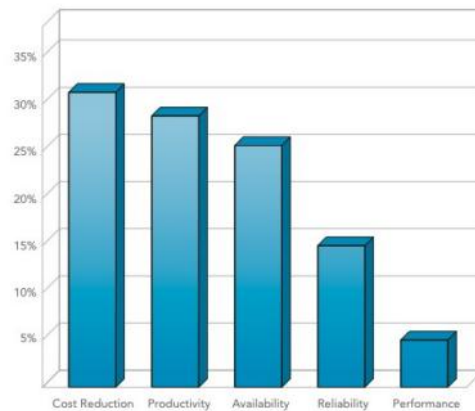
#### A. Date based Action

Reminders can be created using the 'Date Based Action' option. This date based execution option lets you pick a date field from a record in the form and allows you to define the day and time for the rule to be triggered.

#### B. Time based Action

Time-Based Action: Executes the workflow when given a specific execution time. This is useful when you need to configure email alerts to be sent even minutes before the event.

#### Benefits Using Workflow Automation:



### IV. BLUE PRINT

A blueprint is a functional, visual representation of all the elements that are crucial to a successful sales process. Designing a blueprint for your process is like planning the most efficient route before you begin a journey: it helps you stay on track to your goals. Let's look at lead nurturing. You need to first gather details about a lead to add them to your account, then establish contact. When you try to establish contact your lead might not answer your call, in which case you would need to try again the next day. Once you have successfully established communication Case Escalation Rules: It may so happen that sometimes, a case is not attended by the person to whom it is assigned. The Case Escalation feature allows you to configure a rule by which the case can be escalated to other members in the operational hierarchy. You can use Case Escalation Rules, to set the criteria, depending on the distribution rules of an organization.

### V. CONCLUSION

In recent times lots of organization facing multiple how to attend multiple client and how to assign the work flow to the corresponds users. The existing work-related flows are having some other struggles in effective information communication transfers to their customers. Our project automate the process and get relief to the organization from the stress.

### VI. FUTURE ENHANCEMENT

In future we enhance our project to automate the process in hospitals and research centers. The workflow future will handle the patients regularly and central technology organization work closely with professionals to help evolve their workflows by delivering actionable insights and seamless digital experiences

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