

Add and schedule Workflows

Summary

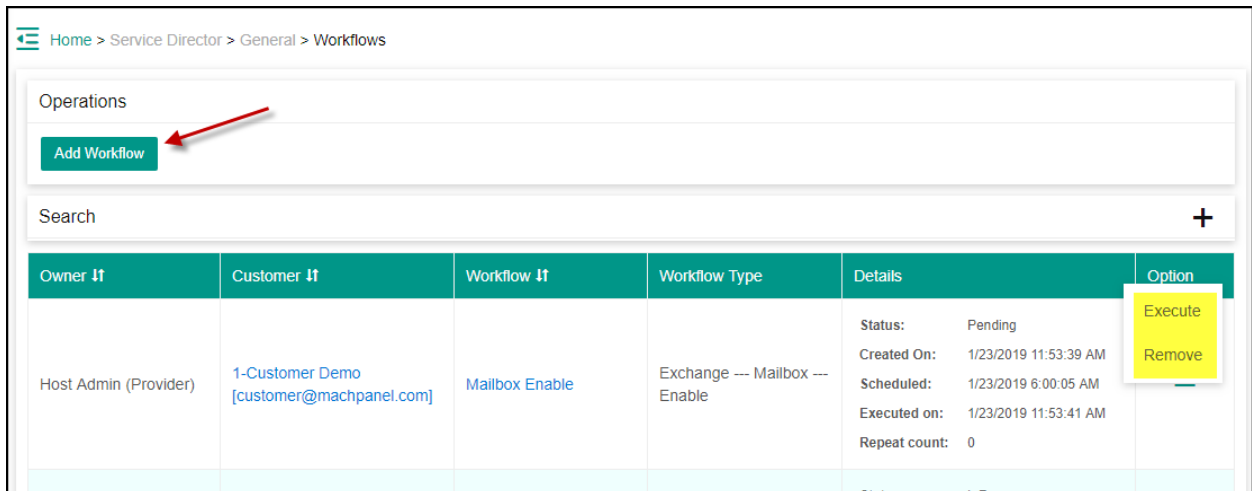
This article provides a summary on how add and schedule Workflows for different type of operations.

Applies To

This article applies to MachPanel build v6.0.38 and above.

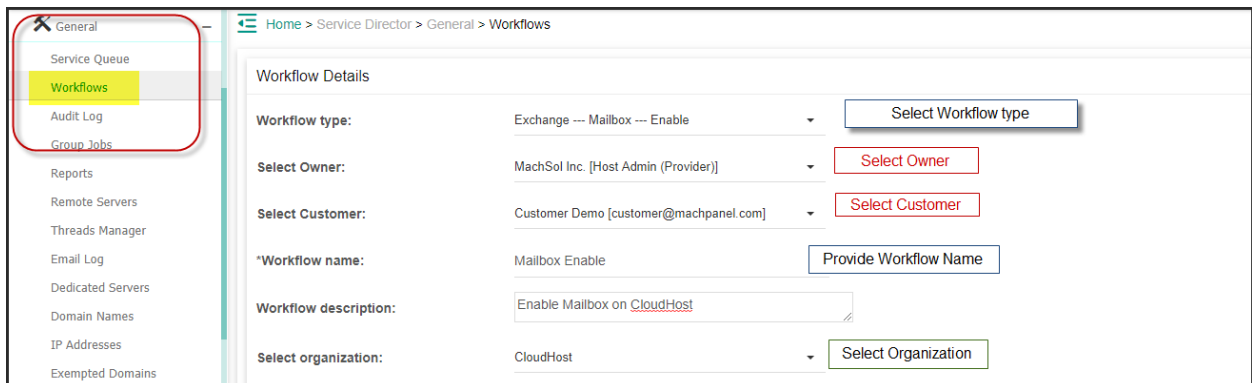
Add and schedule Workflows:

- Navigate to the following path: **Home > Service Director > General > Workflows**



The screenshot shows the MachPanel interface for the 'Workflows' section. The breadcrumb path is 'Home > Service Director > General > Workflows'. Under the 'Operations' header, the 'Add Workflow' button is highlighted with a red arrow. Below this is a search bar and a table of existing workflows. The table has columns for Owner, Customer, Workflow, Workflow Type, Details, and Option. One workflow is listed: 'Mailbox Enable' for 'Host Admin (Provider)' and '1-Customer Demo'. The details for this workflow show it is 'Pending', created on 1/23/2019 11:53:39 AM, scheduled for 1/23/2019 6:00:05 AM, and executed on 1/23/2019 11:53:41 AM. The 'Option' column for this workflow has 'Execute' and 'Remove' buttons.

- Create new Workflow by clicking **Add Workflow** add required details.



The screenshot shows the 'Add Workflow' form in MachPanel. The left sidebar has 'Workflows' highlighted. The main form area is titled 'Workflow Details' and contains the following fields:

- Workflow type:** Exchange --- Mailbox --- Enable (dropdown menu)
- Select Owner:** MachSol Inc. [Host Admin (Provider)] (dropdown menu)
- Select Customer:** Customer Demo [customer@machpanel.com] (dropdown menu)
- *Workflow name:** Mailbox Enable (text input)
- Workflow description:** Enable Mailbox on CloudHost (text input)
- Select organization:** CloudHost (dropdown menu)

Buttons for each dropdown menu are: 'Select Workflow type', 'Select Owner', 'Select Customer', and 'Select Organization'. A 'Provide Workflow Name' button is also present next to the workflow name field.

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- There are different types of Workflow available for Active Directory, Exchange, Skype for business, CSP etc.
- If you want to schedule this then "**Enable Schedule**" as shown below & select Execution Data/Time.

The screenshot shows a configuration interface for adding and scheduling workflows. At the top, the organization is set to 'CloudHost'. Below this, there is a search field for mailboxes. The 'Selected' list contains 'Lucas Hayden' and 'Lyle Hal'. The 'Schedule' checkbox is checked and highlighted in yellow. The execution date is set to '1/23/2019', and the execution time is set to '00' hours and '00' minutes. 'Save' and 'Cancel' buttons are at the bottom.

- Click **Save**, Workflow added successfully Use **search** filter for required customer.

The screenshot shows the workflow management interface. A search filter is applied to the workflow list, showing results for 'Microsoft CSP --- Subscription --- Add'. The 'Add Workflow' button is highlighted in yellow. The interface includes a navigation menu, a search bar, and a user profile indicator for 'Support Admin'.

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MachPanel Knowledgebase

<https://kb.machsol.com/Knowledgebase/55590/Add-and-schedule-Workflows>