

Momentum Workflow Engine

Save time by automating repetitive tasks

Increase efficiency and productivity

Momentum Workflow Engine is an Exo add-on designed to save you time and money by automating repetitive tasks. With Momentum Workflow Engine you can send email reminders for asset maintenance, overdue jobs and purchase orders, inactive customers or suppliers, unused stock items, expiring qualifications and skills, and a whole lot more, all without lifting a finger. Once the tasks you want to automate are setup, the software does the rest, it's that simple.

Automating repetitive tasks will save you staff valuable time, enabling them to become more efficient and productive, improving your bottom line. It will also bring consistency to the way teams complete their tasks and reduce errors. Momentum Workflow Engine requires minimal setup, and the whole process is handled by Momentum. Simply decide what tasks you want to automate, and we'll do the rest.

Prerequisites

- EXO version 8.7 or higher
- .NET

Key Features

Email notifications for:

- Employee information reminders for expiring qualifications, skills etc.
- Asset maintenance reminders (serviceable units)
- Overdue jobs, purchase orders and sales orders
- Stock items under or over the min or max levels
- Stock price increases over a set percentage
- Inactive customers or suppliers
- Unused stock items
- Customers over their credit limit
- Quote follow ups

Other useful features:

- Automatically sync debtor and creditor contacts to their accounts
- Automatically set fields on sub jobs to match those of master jobs
- Automatically create stock adjustments for variances between WIP location and job quantities
- Auto-create job purchase orders
- Schedule data imports and update

Workflow Tasks

WF Type	Name
WorkFlow	Job Branch Sync
WorkFlow	Auto Create Job Purchase Orders
WorkFlow	Overdue Purchase Orders
WorkFlow	Su Schedule Email
WorkFlow	Update Contact From Account

*Please supply dates in dd/mmm/yyyy or dd/mmm/yyyy format e.g. 01/Jul/2014 or 01/July/

Parameter Name	Value	Type
from Date		datetime
job No:		int
branch No:		int

Job Branch Sync schedule (Not Scheduled)

Once Daily From 0800 Repeat Every 60 minutes until 1700

On Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Workflow Engine Schedule (Scheduled)

Once Daily From 0800 Repeat Every 60 minutes until 1700

On Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Scheduled Tasks