


# Connection Request Future Follow-up

Create a workflow similar to the following:

 Connections Notification - Future Followup Id: 193

Details ▼

Advanced Settings ▼

Attributes Count: 7 ▼

Details ▲

**Name** •   Active  Automatically Persisted

**Description**

Used to ping the connector of a connections request set for future followup.















**Work Term** •

**Workflow Number Prefix** i

**Category** •

**Icon CSS Class** i


## Attributes Needed

Attributes Count: 7				
Attribute	Description	Key	Field Type	Required
☰ Requester		Requester	Person	 
☰ Connector		Connector	Person	 
☰ Followup Date		FollowupDate	Date Time	 
☰ Connector Person Alias Id		ConnectorPersonAliasId	Integer	 
☰ Requester Person Alias Id		RequesterPersonAliasId	Integer	 
☰ Connection Request Id		ConnectionRequestId	Integer	 
☰ Opportunity Type		OpportunityType	Integer	 

## Activity Needed

### Activities

[+ Add Activity](#)


 Open and Notify Connector Id: 970 ☰ ^ ✕

**Name** ✔ Active    ✔ Activated with Workflow    🔒

**Description**

Attributes ▼

**Actions** [+ Add Action](#)

 Set Requester via PersonAliasId 🔍 ☰ ▼ ✕

## Actions

+ Add Action

### Set Requester via PersonAliasId

**Name** •

Set Requester via PersonAliasId  Action is Completed on Success  
 Activity is Completed on Success

**Action Type** i • **'Set Attribute Value' Overview**  
Attribute Set Value Sets an attribute's value to the selected value.

**Attribute** i •

Requester

**Text Value** i • or **Attribute Value**

{{ Workflow | Attribute:'RequesterPersonAliasId' | P

{{ Workflow | Attribute:'RequesterPersonAliasId' | PersonByAliasId | Property:'PrimaryAlias.Guid' }}

### Set Connector via ConnectorPersonAliasId

**Name** •

Set Connector via ConnectorPersonAliasId  Action is Completed on Success  
 Activity is Completed on Success

**Action Type** i • **'Set Attribute Value' Overview**  
Attribute Set Value Sets an attribute's value to the selected value.

**Attribute** i •

Connector

**Text Value** i • or **Attribute Value**

{{ Workflow | Attribute:'ConnectorPersonAliasId' | F

{{ Workflow | Attribute:'ConnectorPersonAliasId' | PersonByAliasId | Property:'PrimaryAlias.Guid' }}

Notify Connector

**Name** \*

Notify Connector

Action is Completed on Success
  Activity is Completed on Success

**Action Type**

Email Send

**'Send Email' Overview**

Sends an email. The recipient can either be a group, person or email address determined by the 'To Attribute' value, or an email address entered in the 'To' field. Only people with an active email address without the 'Do Not Email' preference are included. If attribute is a group, only members with an *Active* member status are included.

**From Email Address** i

DoNotReply@fellowshipgreenville.org

or

**Attribute Value**

**Send To Email Addresses** i

or

**Attribute Value**

Connector

**Send to Group Role** i

**Subject** i

Connection request followup reminder from {{ Workflow | Attribute:'Requester' }}

**Body** i

```

1  {{ 'Global' | Attribute:'EmailHeader' }}
2
3  <p>Your connection request for future follow up with <a href="{{ 'Global' | Attribute:'InternalApplicationRoot'
}}page/408?ConnectionRequestId={{ Workflow | Attribute:'ConnectionRequestId' }}&ConnectionOpportunityId={{
Workflow | Attribute:'OpportunityType' }}">{{ Workflow | Attribute:'Requester' }}</a> is scheduled for today
, {{ Workflow | Attribute:'FollowupDate' | Date:'M/d/yyyy' }}. Please click <a href="{{ 'Global' | Attribute
:'InternalApplicationRoot' }}page/408?ConnectionRequestId={{ Workflow | Attribute:'ConnectionRequestId'
}}&ConnectionOpportunityId={{ Workflow | Attribute:'OpportunityType' }}">here</a> to followup, see history
or edit the connection request.</p>
4
5  <br />
6  {{ 'Global' | Attribute:'EmailFooter' }}
7

```

Body of email:

```
{{ 'Global' | Attribute:'EmailHeader' }}
```

```
<p>Your connection request for future follow up with <a href="{{ 'Global' | Attribute:'InternalApplicationRoot'
}}page/408?ConnectionRequestId={{ Workflow | Attribute:'ConnectionRequestId' }}&ConnectionOpportunityId={{
Workflow | Attribute:'OpportunityType' }}">{{ Workflow | Attribute:'Requester' }}</a> is scheduled for today, {{
Workflow | Attribute:'FollowupDate' | Date:'M/d/yyyy' }}. Please click <a href="{{ 'Global' | Attribute
:'InternalApplicationRoot' }}page/408?ConnectionRequestId={{ Workflow |
Attribute:'ConnectionRequestId' }}&ConnectionOpportunityId={{ Workflow | Attribute:'OpportunityType'
}}">here</a> to followup, see history or edit the connection request.</p>
```

<br />

{{ 'Global' | Attribute:'EmailFooter' }}

### Complete Workflow

**Name** •

Action is Completed on Success  
 Activity is Completed on Success

**Action Type**

**'Complete Workflow' Overview**  
Marks the workflow as complete

**Status** i  or **Status Attribute**

## Job Settings (Admin Tools > System Settings > Jobs Administration)

**Name** •  **Active**  Yes

**Description**

**Notification Status**  **Cron Expression** i •

**Notification Emails** i

**Job Type** •  **Cron Description** At 07:00 AM

**Last Status Message**  
Workflow Launch Results:  
Success: 1  
Failed: 0

**Source**

**SQL Query** i

```
1 SELECT
2 Id AS ConnectionRequestId
3 ,PersonAliasId AS RequesterPersonAliasId
4 ,ConnectionOpportunityId AS OpportunityType
5 ,ConnectorPersonAliasId
6 ,FollowupDate
7 FROM ConnectionRequest
8 WHERE ConnectionState = '2' AND CONVERT(varchar,FollowupDate,1) = CONVERT
9 (varchar, getdate(), 1)
```

**Command Timeout** i

Data View ⓘ

▼

Target

Workflow ⓘ •

⚙️ Connections Notif... ▼

Save Cancel

SQL Query:

```

SELECT
    Id AS ConnectionRequestId
    ,PersonAliasId AS RequesterPersonAliasId
    ,ConnectionOpportunityId AS OpportunityType
    ,ConnectorPersonAliasId
    ,FollowupDate
FROM ConnectionRequest
WHERE ConnectionState = '2' AND CONVERT(varchar,FollowupDate,1) = CONVERT(varchar, getdate(), 1)

```

## Email to be sent by this process



Your connection request for future follow up with [Eddie Holeman](#) is scheduled for today, 6/13/2019. Please click [here](#) to followup, see history or edit the connection request.



CONTACT INFORMATION:  
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