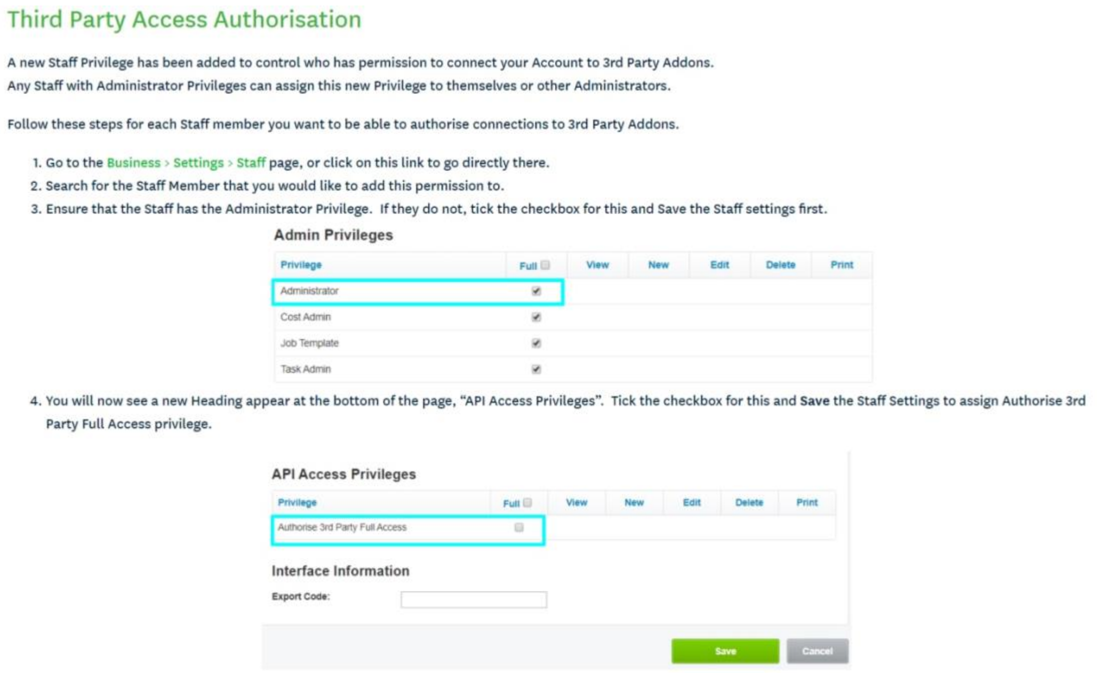
WorkFlowMax Implmentation Document

Follow these steps for each Staff member you want to be able to authorise connections to 3rd Party Addons.

Go to the [Business > Settings > Staff]() page, or click on this link to go directly there.
Search for the Staff Member that you would like to add this permission to.
Ensure that the Staff has the Administrator Privilege. If they do not, tick the checkbox for this and Save the Staff settings first.

1. *Allow Access to CleverTime user to WFM*
   First of all, please check your account access authorisation settings in WorkflowMax, please refer to the Third Party Access Authorization section of the official API documentation: https://www.workflowmax.com/api/v3/oauth2.0



Third Party Access Authorisation

A new Staff Privilege has been added to control who has permission to connect your Account to 3rd Party Addons.
Any Staff with Administrator Privileges can assign this new Privilege to themselves or other Administrators.

Follow these steps for each Staff member you want to be able to authorise connections to 3rd Party Addons.

1. Go to the Business > Settings > Staff page, or click on this link to go directly there.
2. Search for the Staff Member that you would like to add this permission to.
3. Ensure that the Staff has the Administrator Privilege. If they do not, tick the checkbox for this and Save the Staff settings first.

Admin Privileges

Privilege	Full	View	New	Edit	Delete	Print
Administrator	✔					
Cost Admin	✔					
Job Template	✔					
Task Admin	✔					

4. You will now see a new Heading appear at the bottom of the page, "API Access Privileges". Tick the checkbox for this and **Save** the Staff Settings to assign Authorise 3rd Party Full Access privilege.

API Access Privileges

Privilege	Full	View	New	Edit	Delete	Print
Authorise 3rd Party Full Access	☐					

Interface Information

Export Code:

Save Cancel

2. *Customised field - Job States*
   Please review your **Job States**, and provide the name of **Job State** whose **State Type** is **Completed** and **Cancelled**.
   1. In the **Business** menu, select **Settings > Job Settings**.
   2. On the **Job Settings** screen, select the **Job State** tab.
   3. Review the list of existing job state names.

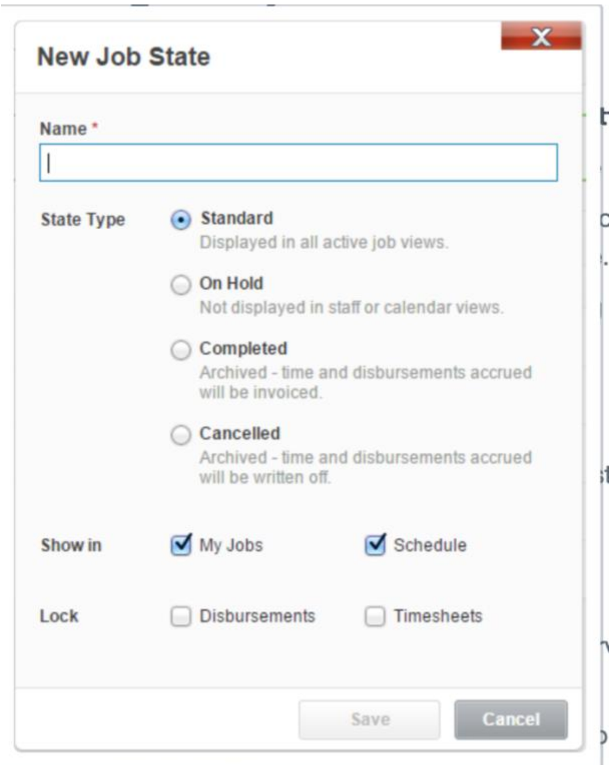
   For instruction in WFM refer here:

Video - https://support.workflowmax.com/Content/Workflowmax/Job_States.htm

https://support.workflowmax.com/Content/Workflowmax/Creating_a_Job_State.htm

Give us the name & type that you have set in WFM:

1. Name:
   Type:
2. Name:
   Type:
3. Name:
   Type:
4. Name:
   Type:
5. Name:
   Type:



3. *Give access to CleverTime via login*
   Finally, please follow the steps below in CleverTime to authorise our application access to your data in WorkflowMax (To allow 1st time syncing. You can also manually synchronize data when required).

1. In the sidebar menu, select **Settings > WorkflowMax Sync**.
2. On the **Data Synchronization** screen, please only select **From** date and **To** date
    - **From**: Return jobs created on or after this date.
    - **To**: Return jobs created on or before this date.
    - **Company Nodes** remain blank.
3. After setting dates, please clicks **Update** button. Now you'll be prompted with a dialog of WorkflowMax official site. Follow the instructions in the dialog to complete authorisation.
4. After completing the above steps, it will redirect back to **CleverTime's Data Synchronization** screen, and then start first sync. The synchronization result will be printed on the screen after the synchronization is completed.
5. **In the future, you will not be required to do the above operations again, it will automatically sync in the early hours of each day.**
6. You can also manually sync if you require any new information to sync across to CleverTime during the day.

4. After **authorise CleverTime Full Access**, we will fetch the following data from WorkflowMax:
    - **Jobs**
    - **Tasks**
    - **Staff members**
      The two system is matching employees by their First & Last name, so make sure they are the same in both system

5. **You should be maintaining the job/task status & information in WFM**,
    - Auto- sync happens in early hours each morning daily
    - CleverTime will only sync across any "Current" jobs & will "inactive" any jobs in CleverTime that has a Completed Date/state in WFM
    - Any job added from CleverTime <u>will not</u> be sync across to WFM

You should now have full data sync between WFM & CleverTime