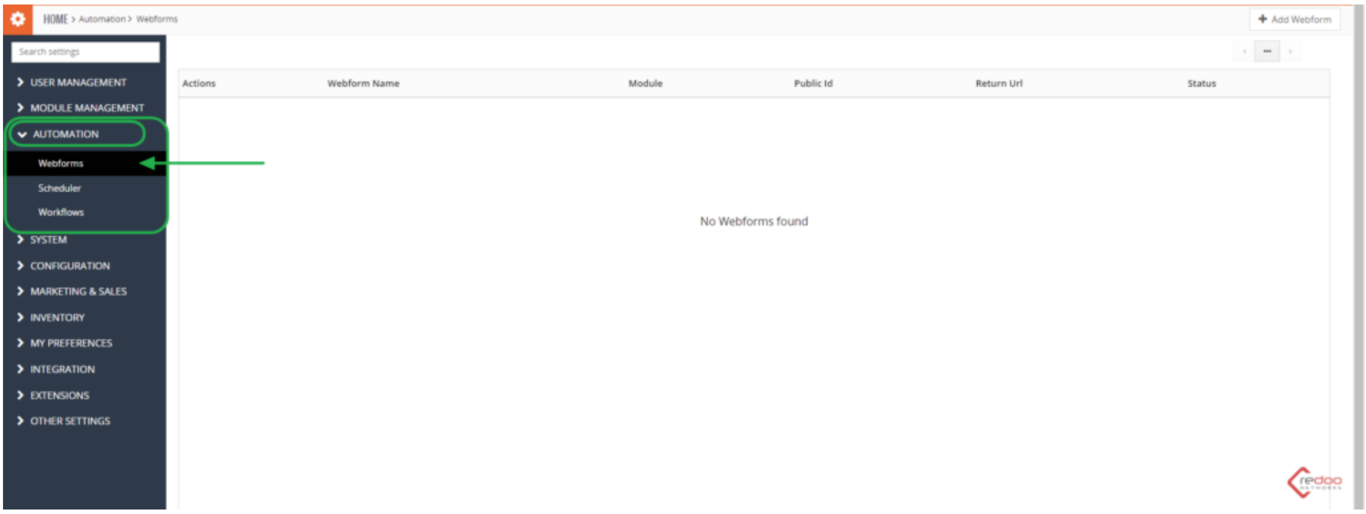
Flexx.Suite

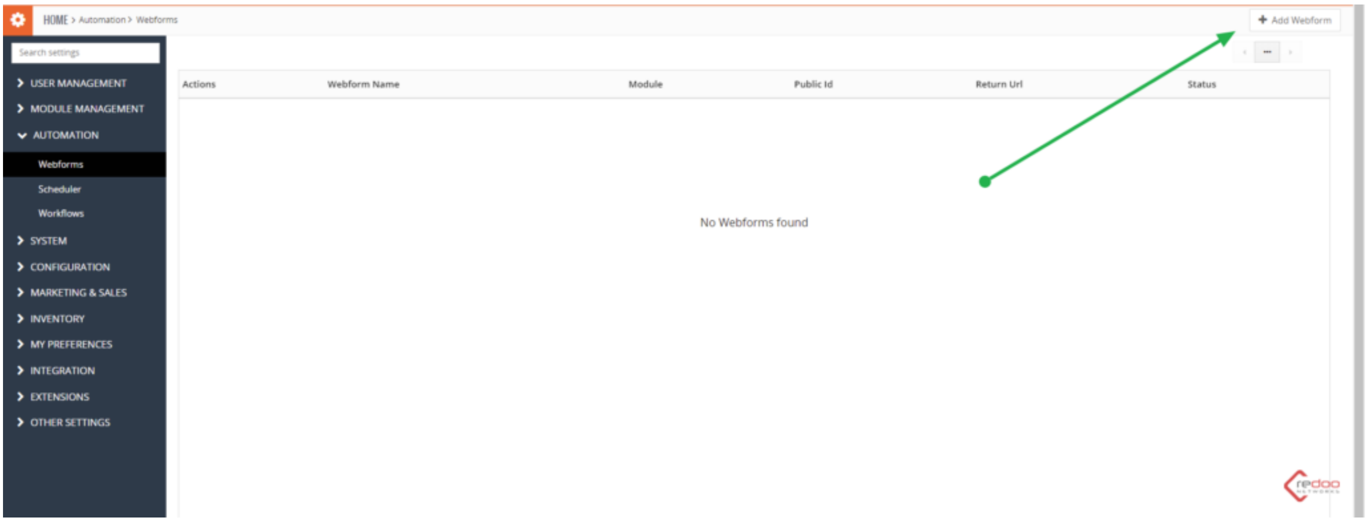
9.Automation

In Automation section you

Webforms

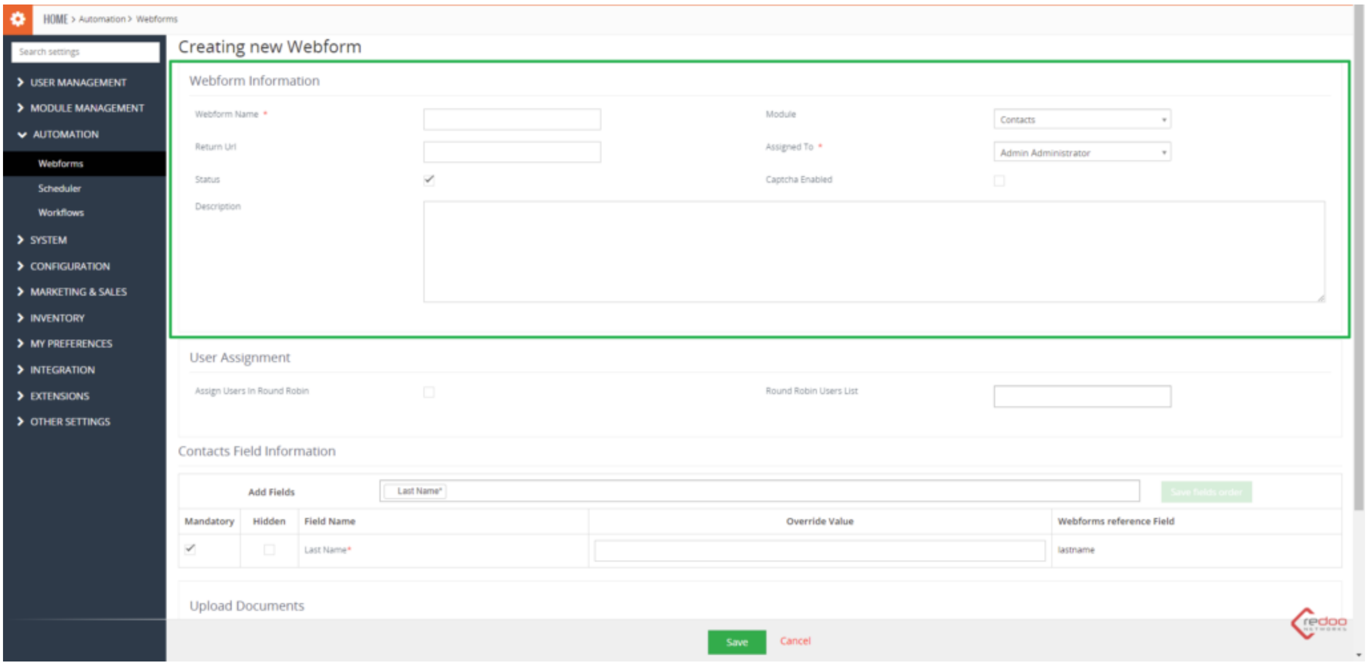


To add a new Webform press the “Add Webform” button like shown in the image



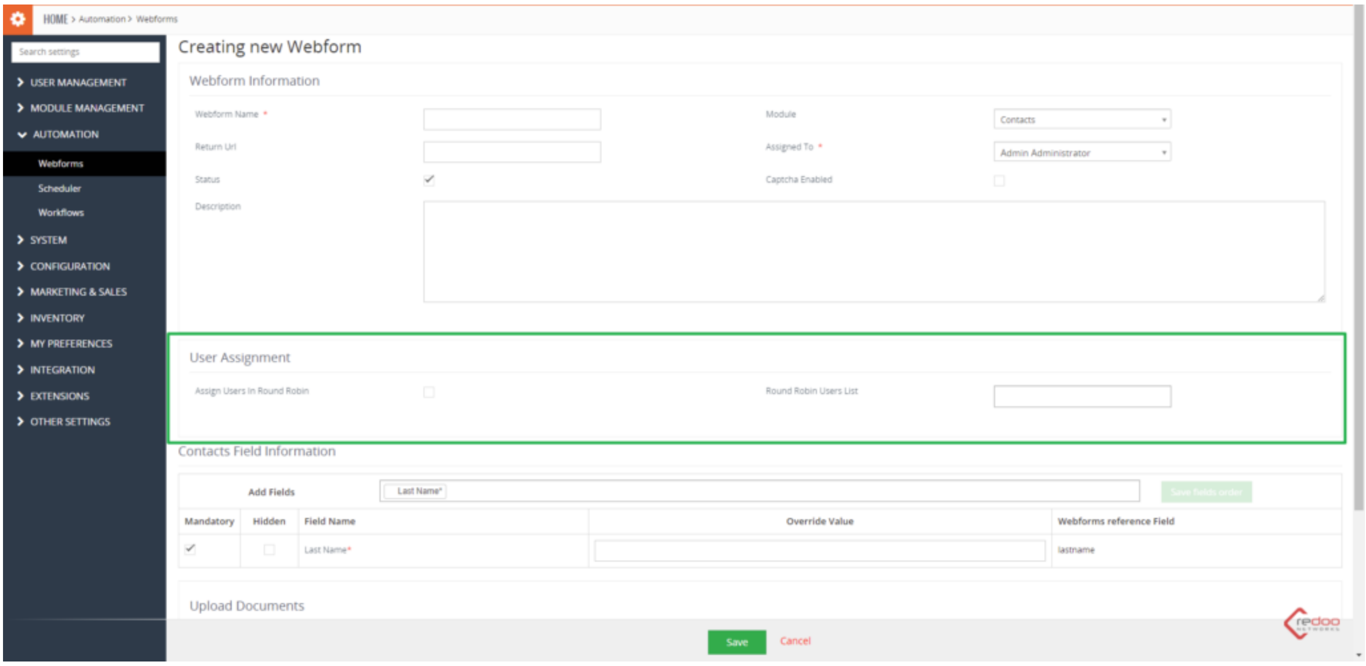
In the first block “Webform Information” fill in the following fields:

- Webform Name
- Return URL
- Status
- Module that corresponds to the webform
- Assigned user
- Enable/Disable Captcha
- Description

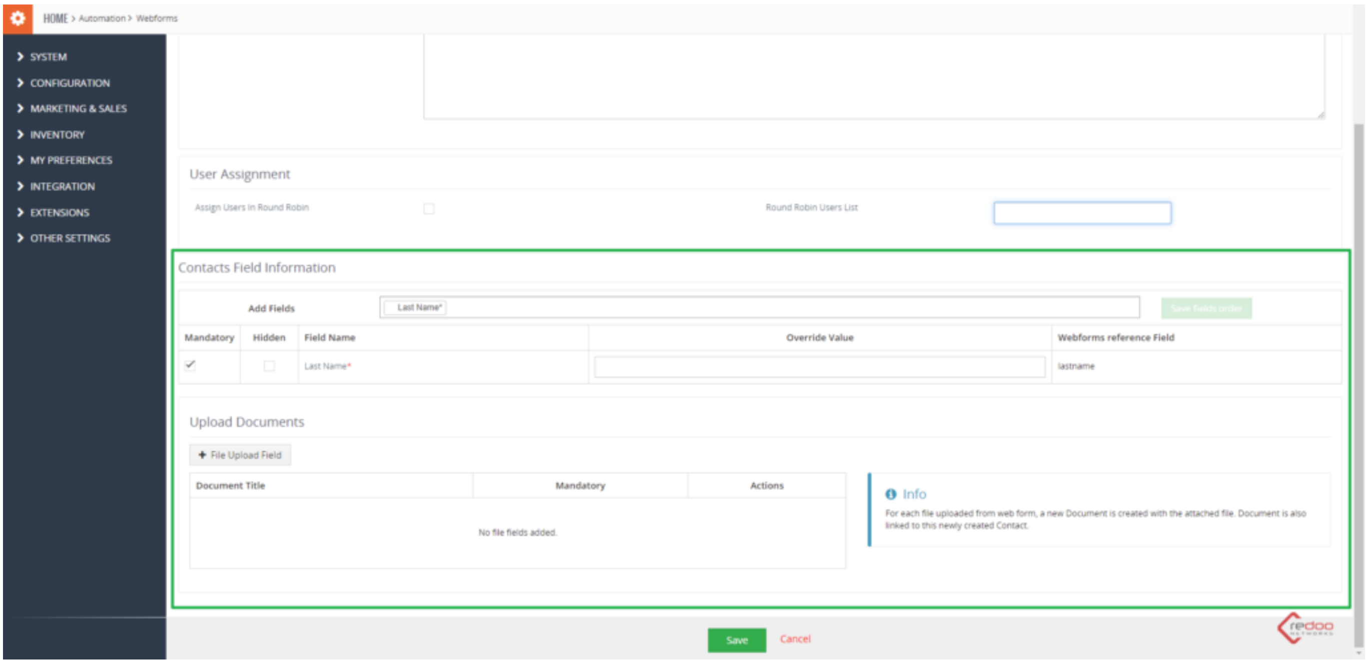


In the User Assignment enter:

- Assign Users In Round Robin – Yes/No
- Round Robin User List – select users

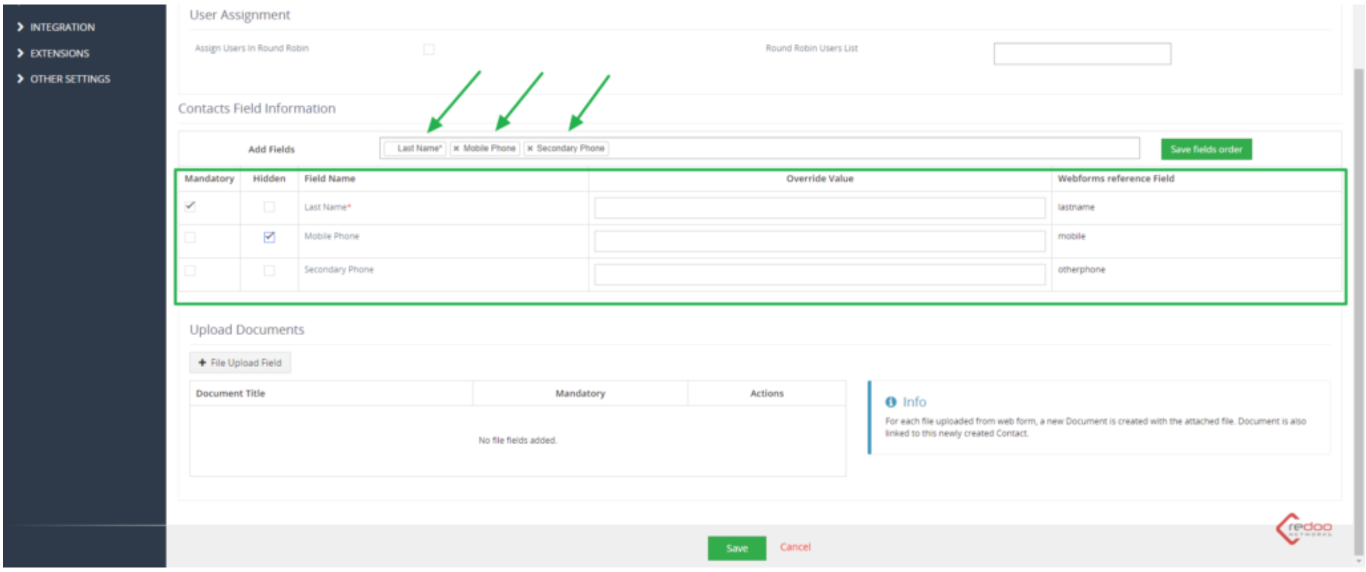


Down below there is Contacts Field Information

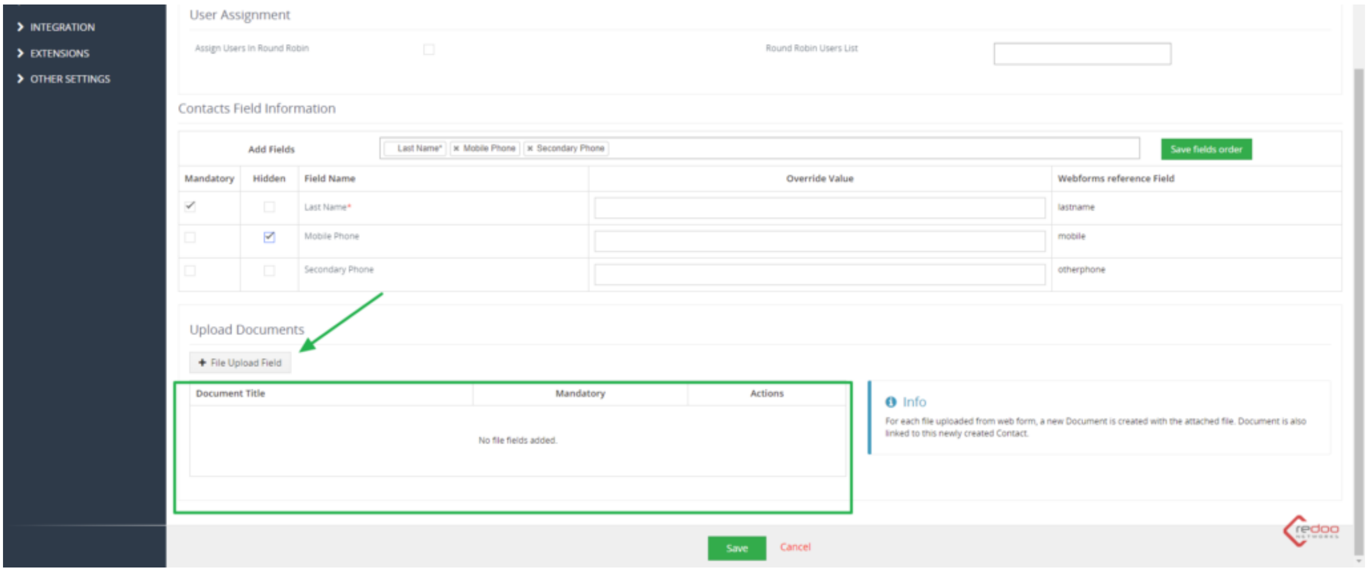


In the first part you can add Field Labels and adjust their order.

As well you can set weather this is a mandatory field, is it visible or hidden and add an override value



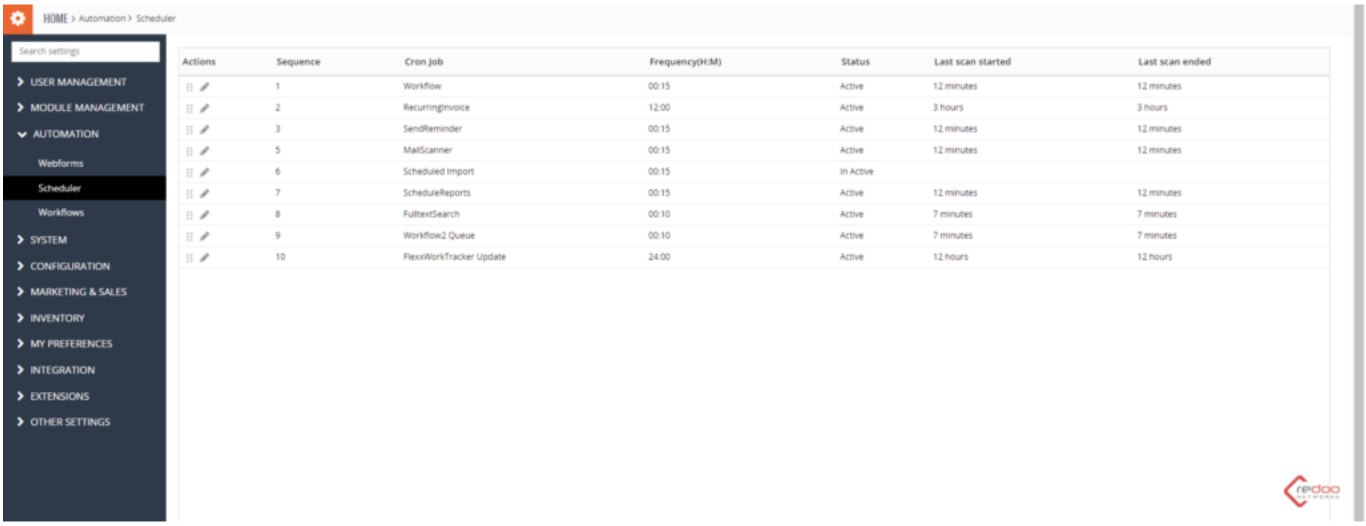
Next section is used for uploading fields as a file using the “File Upload Field”.



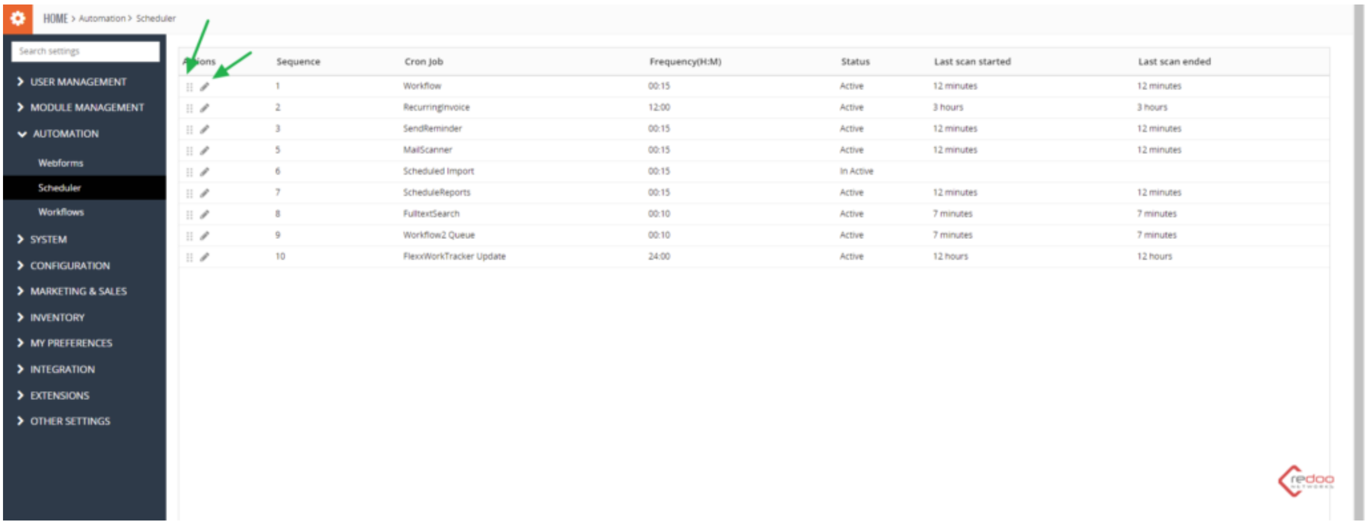
Scheduler

Scheduler is used to create Schedules for inner CRM processes

On this page you can see the list of available Schedules, modules they are working with, Frequency of scanning, the Status of the Schedule and Last scan started/ended time



This two buttons in Actions are used for moving Schedules within the list via drag and drop and for editing

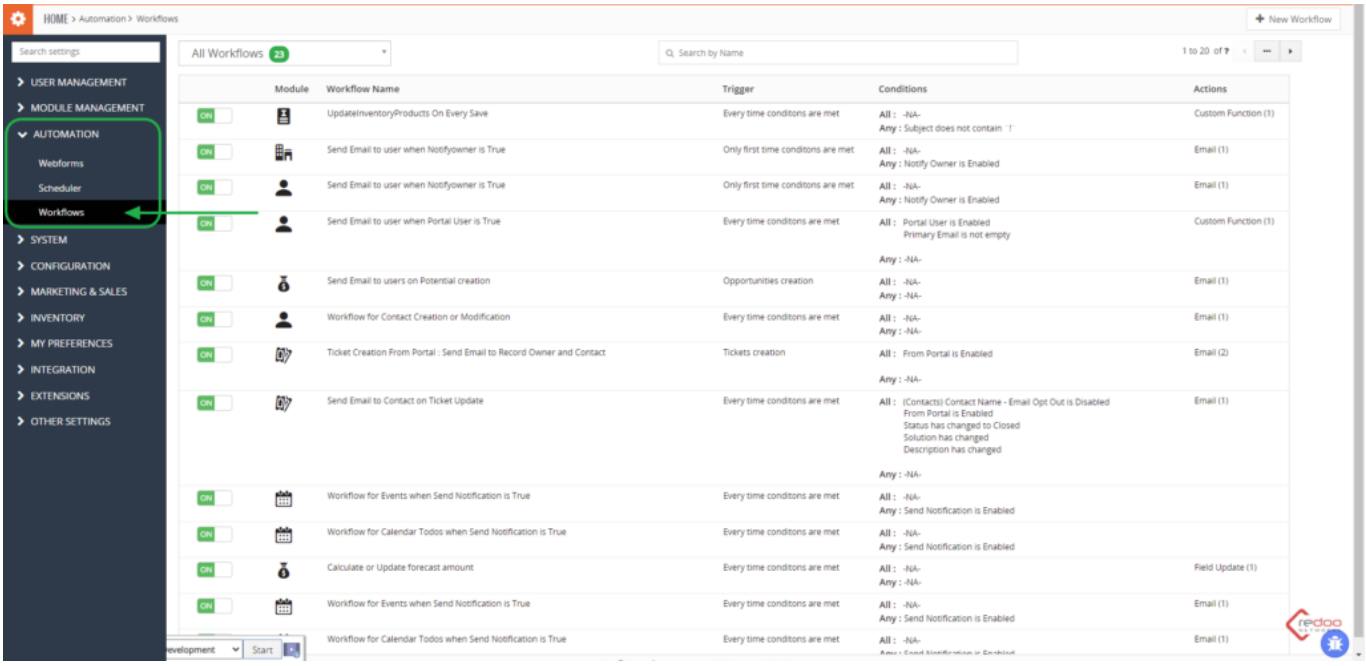


Workflows

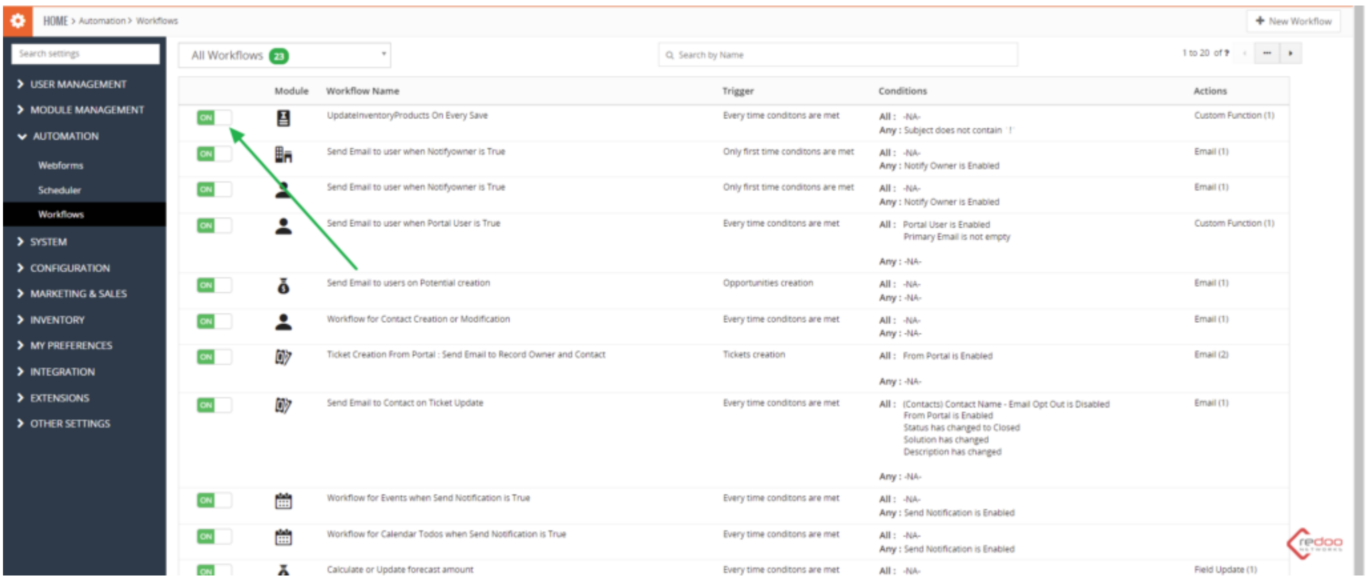
This section displays the list of all available workflows within the CRM.

Each workflow is an adjustable function that operates with CRM data and can automatically execute different processes without user`s involvement. Like an automatic email sending, event creations in calendar or record`s field updates.

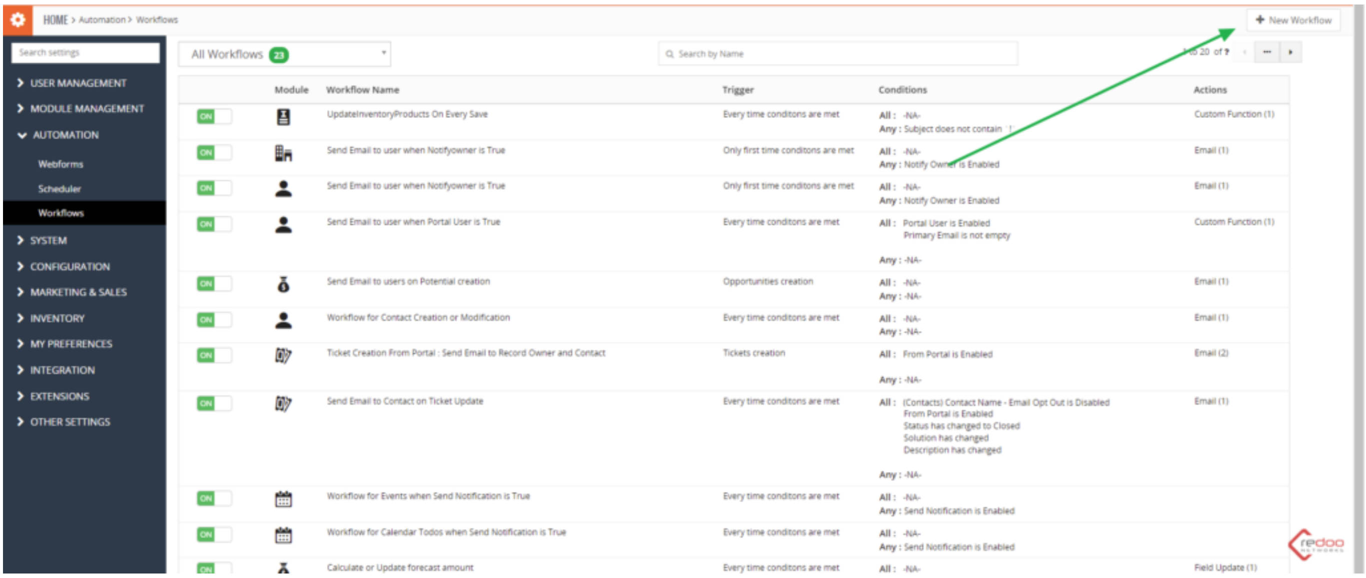
Using the upper fields you can filter the workflows or use the search by name fuction



Green buttons on the left are used to turn on/off the workflow



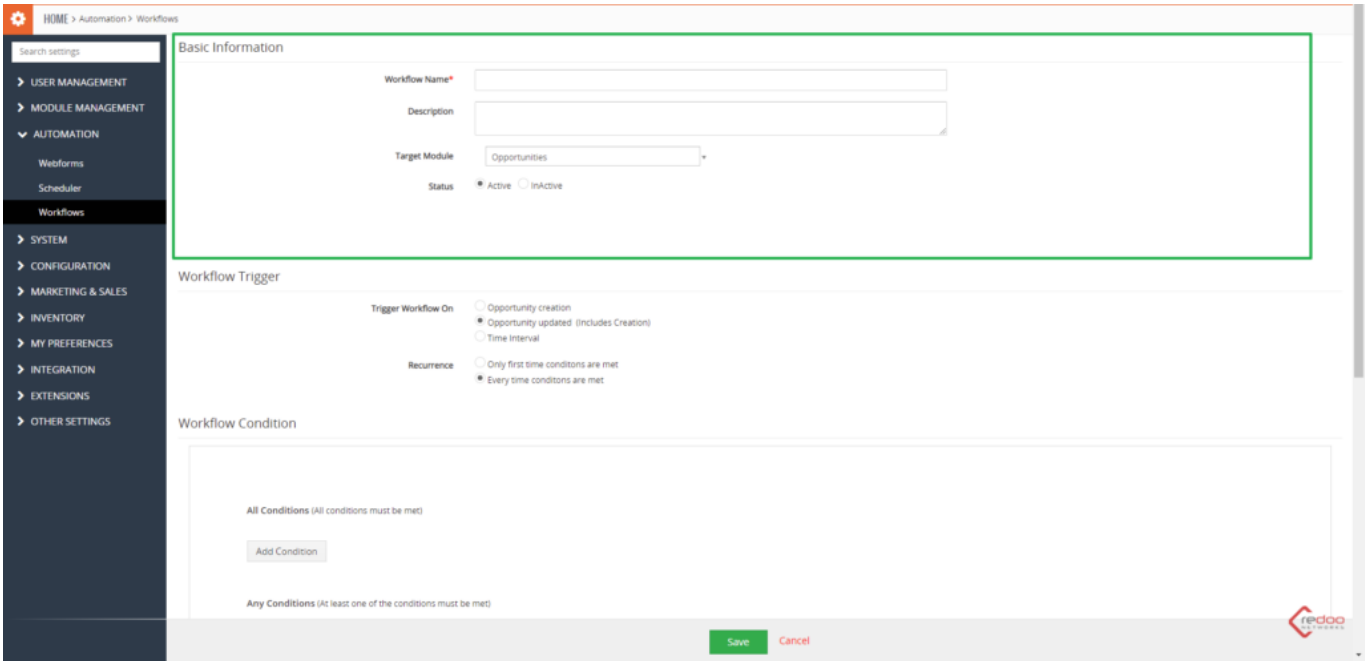
To add a new Workflow press the “New Workflow” button in the upper right corner of the page



In here the create page is divided into blocks

First is Basic Information:

- Workflow Name
- Description
- Target Module
- Status



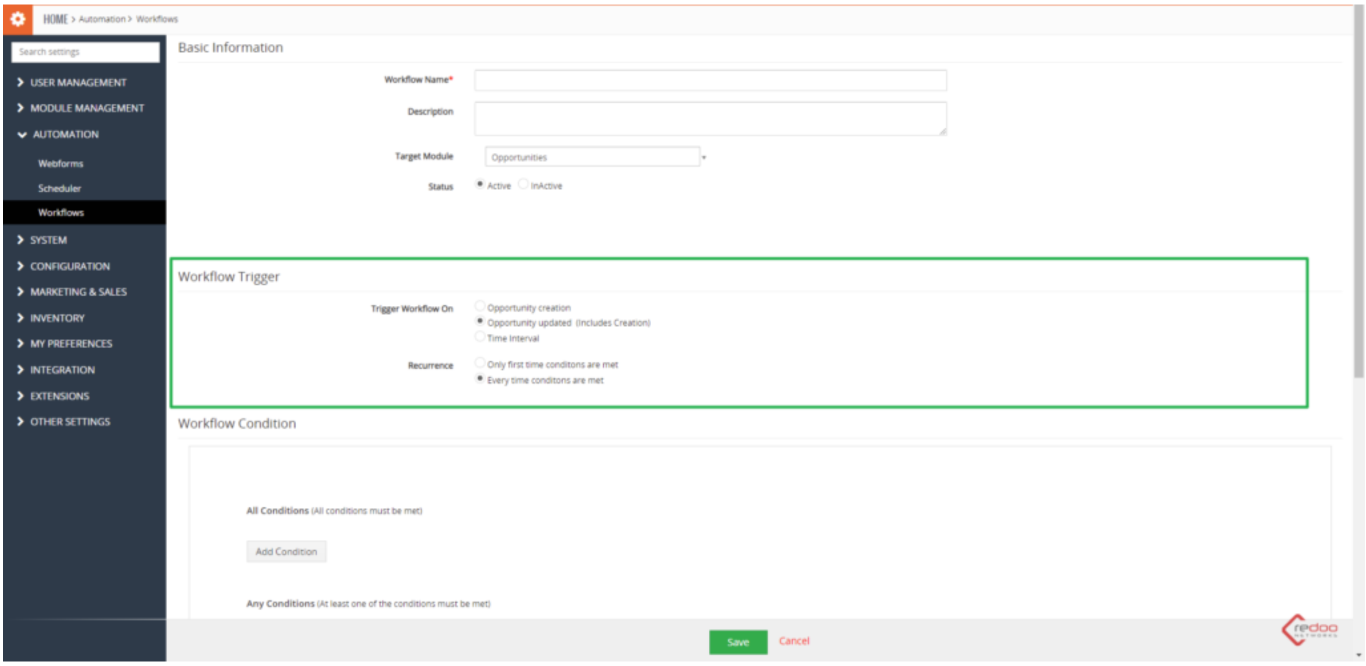
Next is Workflow Trigger:

- Trigger Workflow on

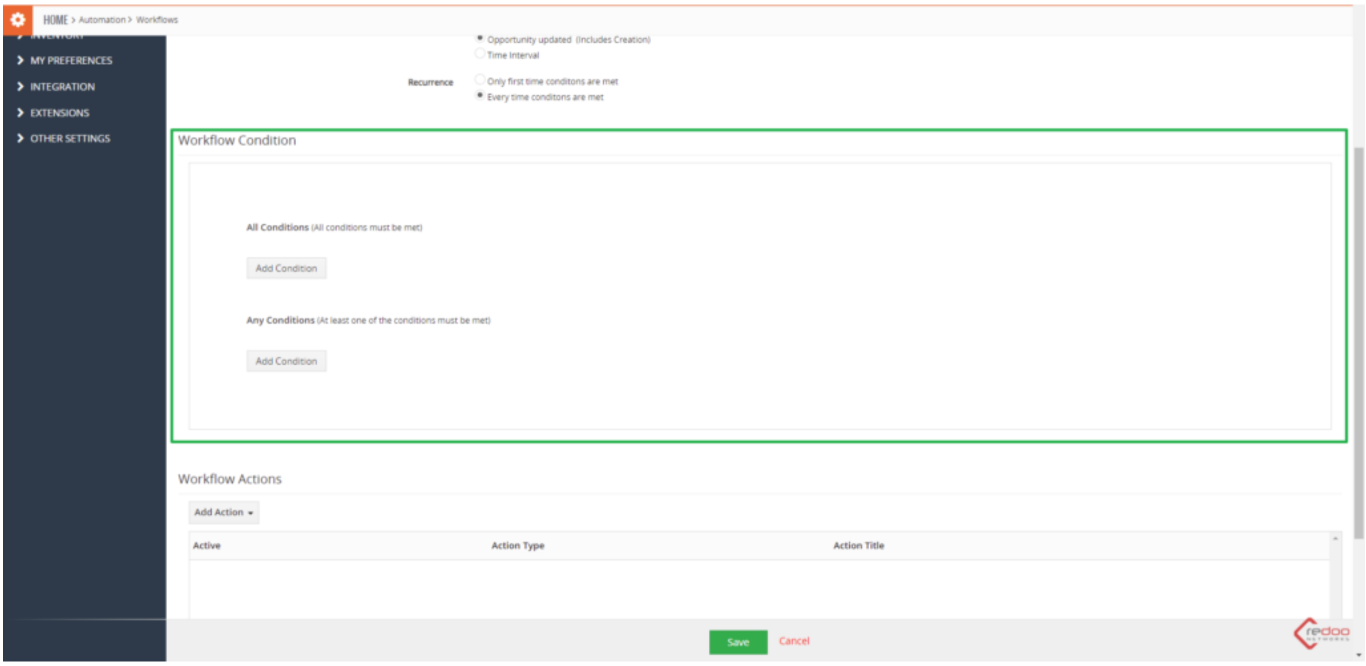
1. Creation
2. Upload
3. Time Interval

- Recurrence

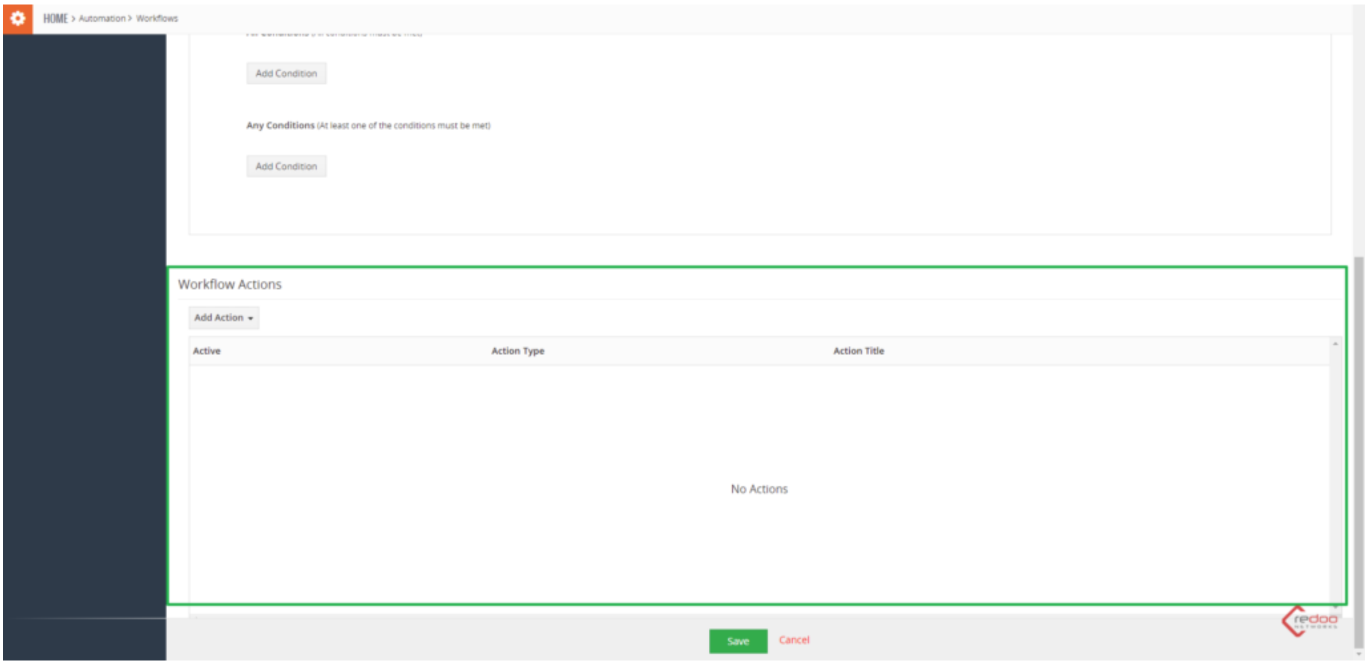
1. Only first time conditions are met
2. Every time confitions are met



Workflow Condition – Here you can add two type of Conditions: One is for all conditions must be met and the second one is for at least one of the conditions must be met



Down below there is Workflow Actions


HOME > Automation > Workflows
Add Condition
Any Conditions (At least one of the conditions must be met)
Add Condition
Workflow Actions
Add Action
Active
Action Type
Action Title
No Actions
Save
Cancel

