

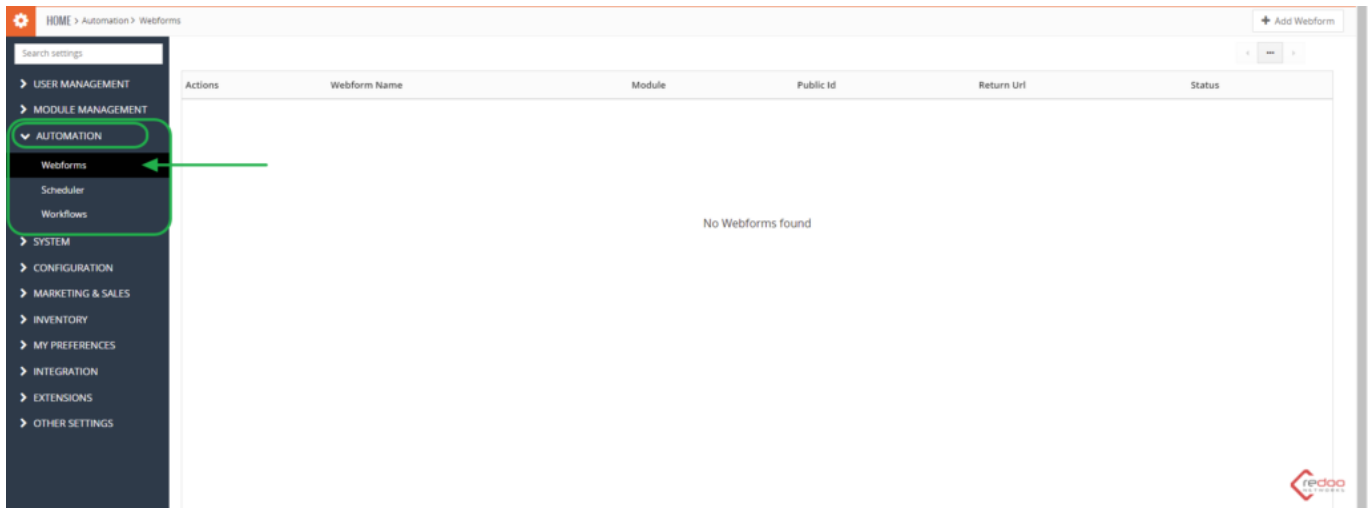


Flexx.Suite

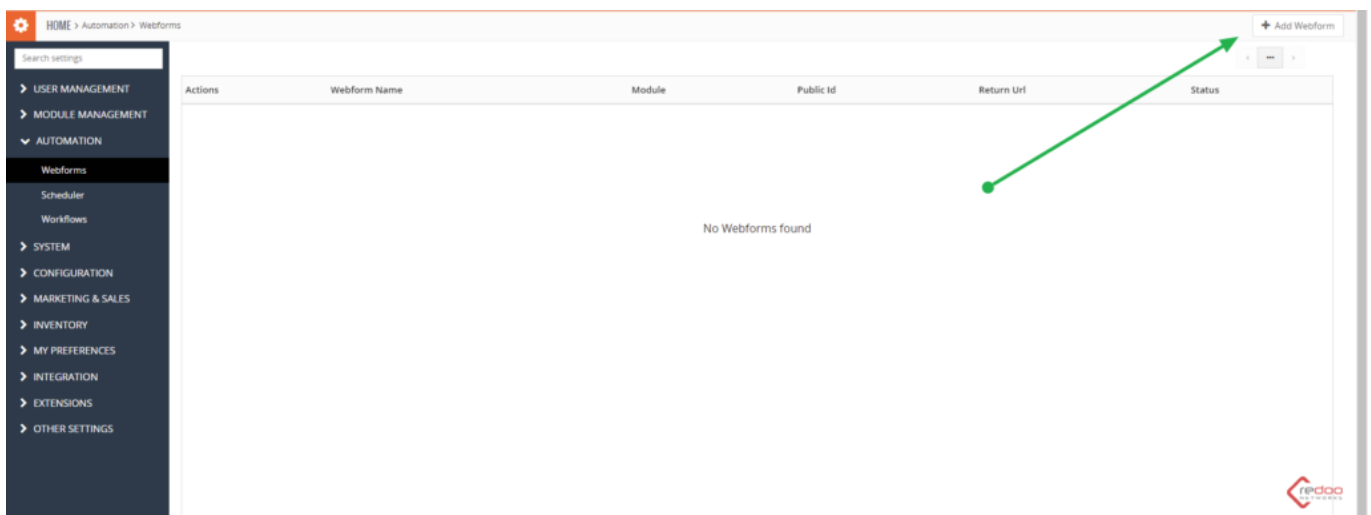
9.Automation

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

HOME > Automation > Webforms

Creating new Webform

Webform Information

Webform Name * Module

Return URL Assigned To *

Status Captcha Enabled

Description

User Assignment

Assign Users In Round Robin Round Robin Users List

Contacts Field Information

Add Fields

Mandatory	Hidden	Field Name	Override Value	Webforms reference Field
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Last Name*	<input type="text"/>	lastname

Upload Documents

redoo

In the User Assignment enter:

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

HOME > Automation > Webforms

Search settings

USER MANAGEMENT
MODULE MANAGEMENT
AUTOMATION
Webforms
Scheduler
Workflows
SYSTEM
CONFIGURATION
MARKETING & SALES
INVENTORY
MY PREFERENCES
INTEGRATION
EXTENSIONS
OTHER SETTINGS

Creating new Webform

Webform Information

Webform Name Module

Return URL Assigned To

Status Captcha Enabled

Description

User Assignment

Assign Users in Round Robin Round Robin Users List

Contacts Field Information

Add Fields

Mandatory	Hidden	Field Name	Override Value	Webforms reference Field
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Last Name*	<input type="text"/>	lastname

Upload Documents

Down below there is Contacts Field Information

HOME > Automation > Webforms

SYSTEM
CONFIGURATION
MARKETING & SALES
INVENTORY
MY PREFERENCES
INTEGRATION
EXTENSIONS
OTHER SETTINGS

User Assignment

Assign Users in Round Robin Round Robin Users List

Contacts Field Information

Add Fields

Mandatory	Hidden	Field Name	Override Value	Webforms reference Field
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Last Name*	<input type="text"/>	lastname

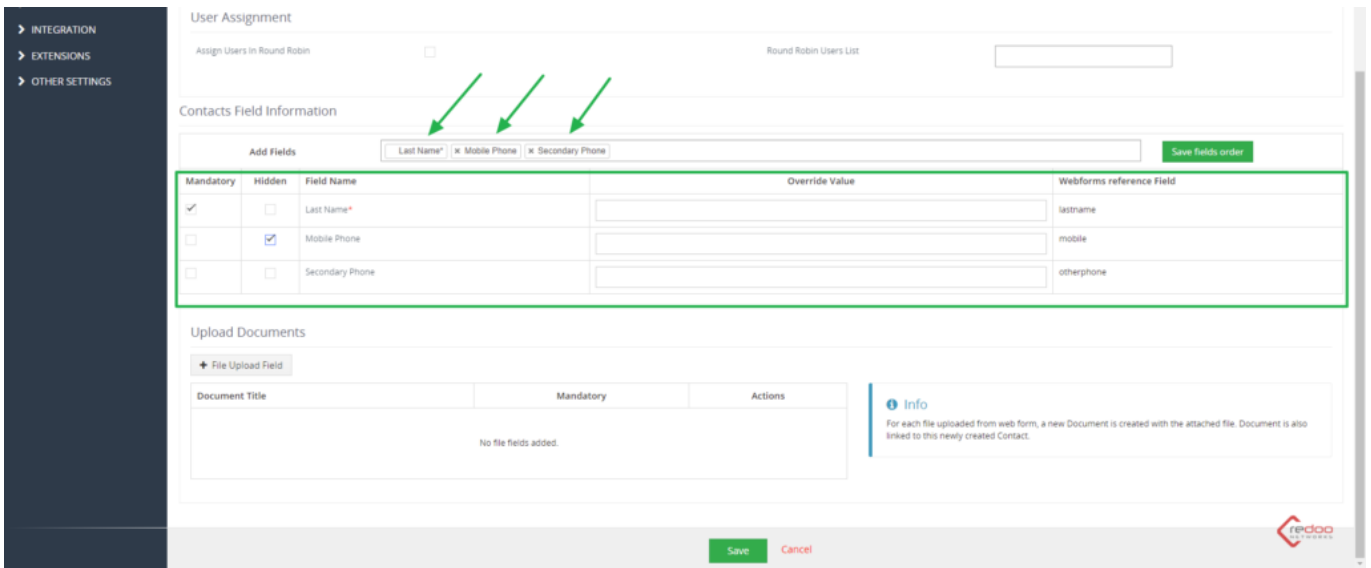
Upload Documents

Document Title	Mandatory	Actions
No file fields added.		

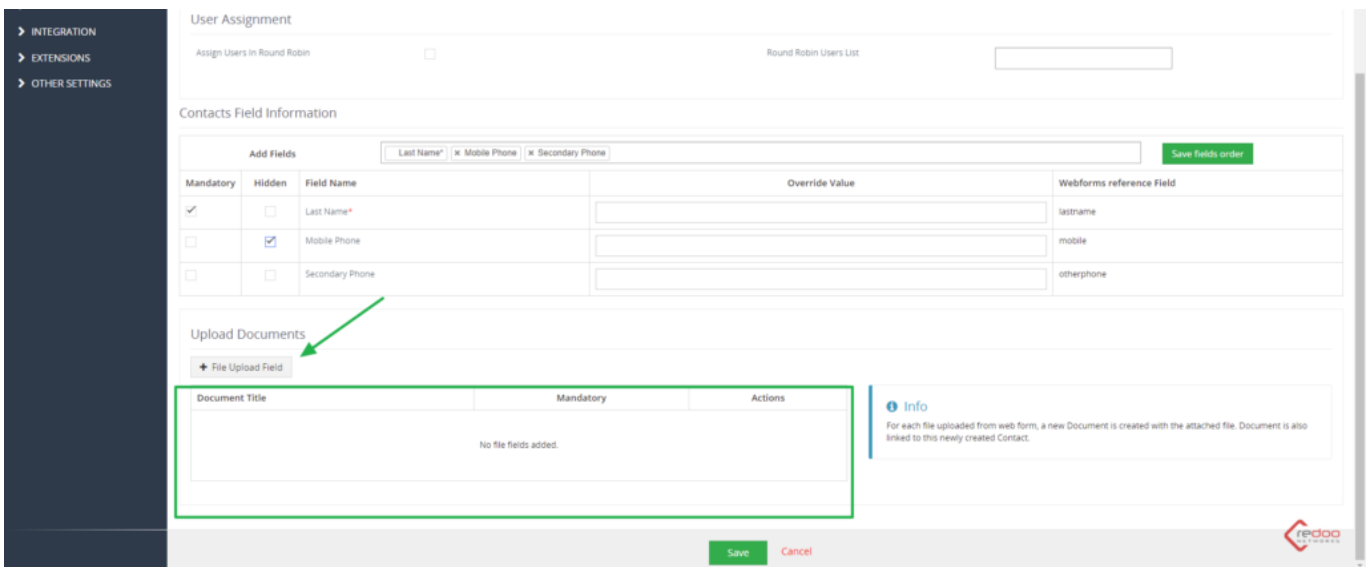
Info
For each file uploaded from web form, a new Document is created with the attached file. Document is also linked to this newly created Contact.

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

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



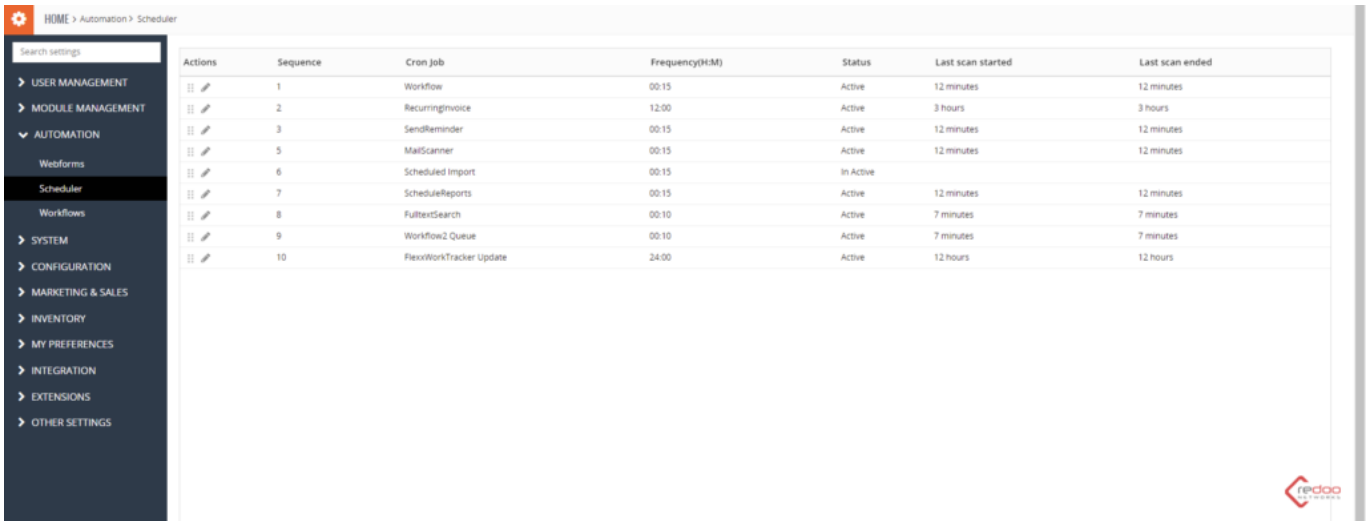
Next section is used for uploading fields as a file using the “File Upload Field”.





















Scheduler

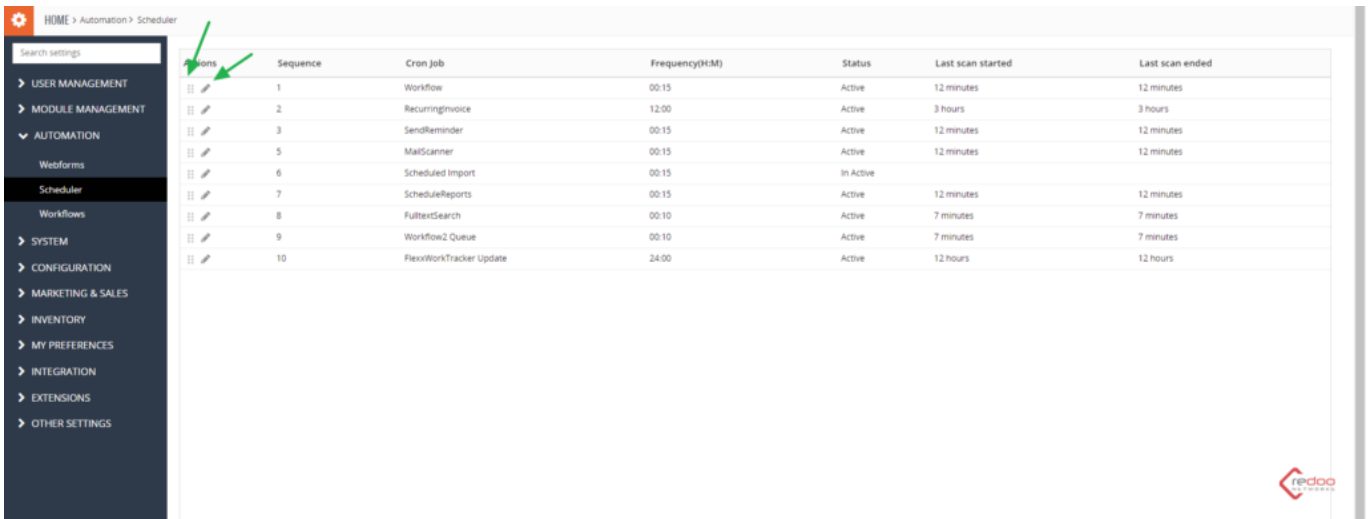
Scheduler is used to create Schedules for inner CRM processes



















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



Actions	Sequence	Cron Job	Frequency(H:M)	Status	Last scan started	Last scan ended
 	1	Workflow	00:15	Active	12 minutes	12 minutes
 	2	RecurringInvoice	12:00	Active	3 hours	3 hours
 	3	SendReminder	00:15	Active	12 minutes	12 minutes
 	5	MailScanner	00:15	Active	12 minutes	12 minutes
 	6	Scheduled Import	00:15	In Active		
 	7	ScheduleReports	00:15	Active	12 minutes	12 minutes
 	8	FulltextSearch	00:10	Active	7 minutes	7 minutes
 	9	Workflow2 Queue	00:10	Active	7 minutes	7 minutes
 	10	FlexiWorkTracker Update	24:00	Active	12 hours	12 hours

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



Actions	Sequence	Cron Job	Frequency(H:M)	Status	Last scan started	Last scan ended
 	1	Workflow	00:15	Active	12 minutes	12 minutes
 	2	RecurringInvoice	12:00	Active	3 hours	3 hours
 	3	SendReminder	00:15	Active	12 minutes	12 minutes
 	5	MailScanner	00:15	Active	12 minutes	12 minutes
 	6	Scheduled Import	00:15	In Active		
 	7	ScheduleReports	00:15	Active	12 minutes	12 minutes
 	8	FulltextSearch	00:10	Active	7 minutes	7 minutes
 	9	Workflow2 Queue	00:10	Active	7 minutes	7 minutes
 	10	FlexiWorkTracker Update	24:00	Active	12 hours	12 hours

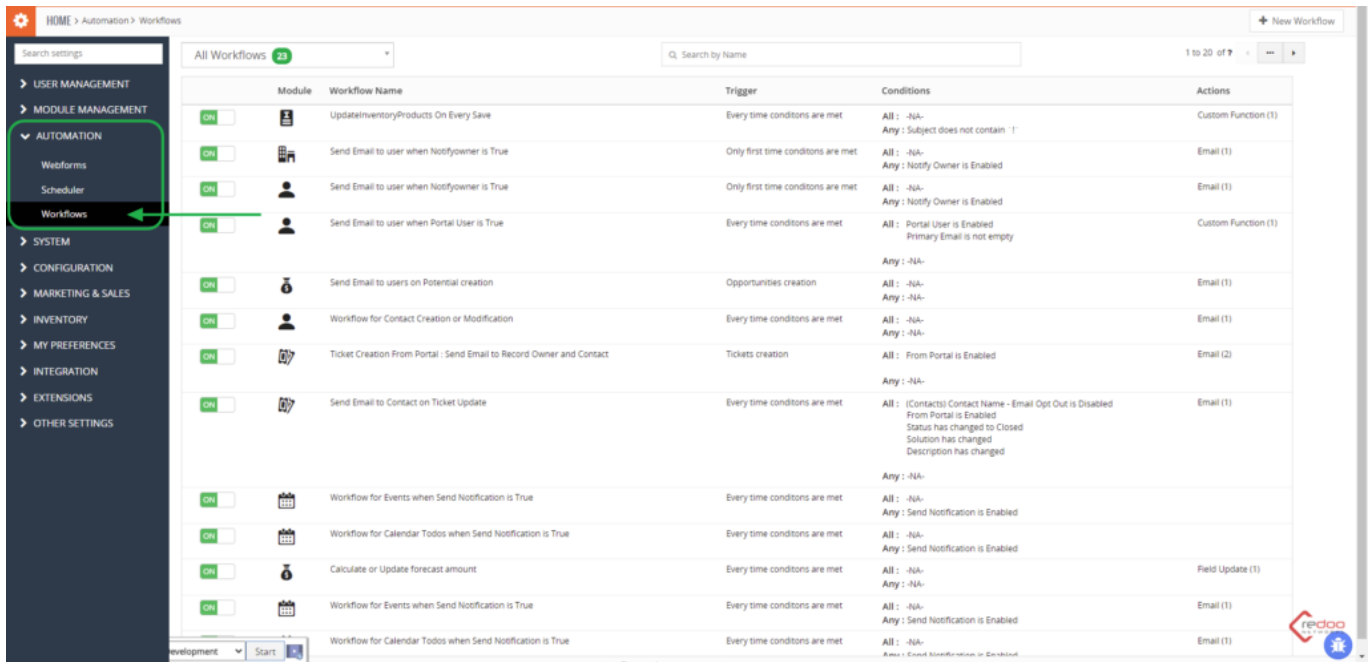
Workflows

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

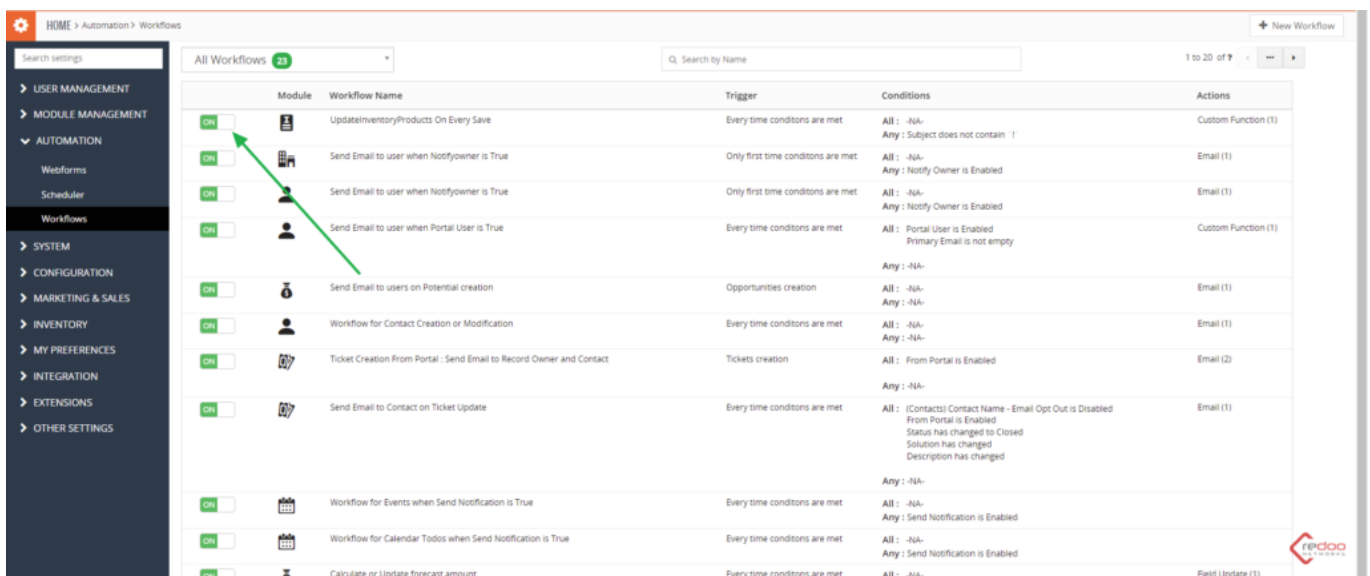
Each workflow is an adjustable function that operates with CRM data and can automatically execute

different processes without user`s involvement. Like an automatic email sending, event creations in calendar or record`s field updates.

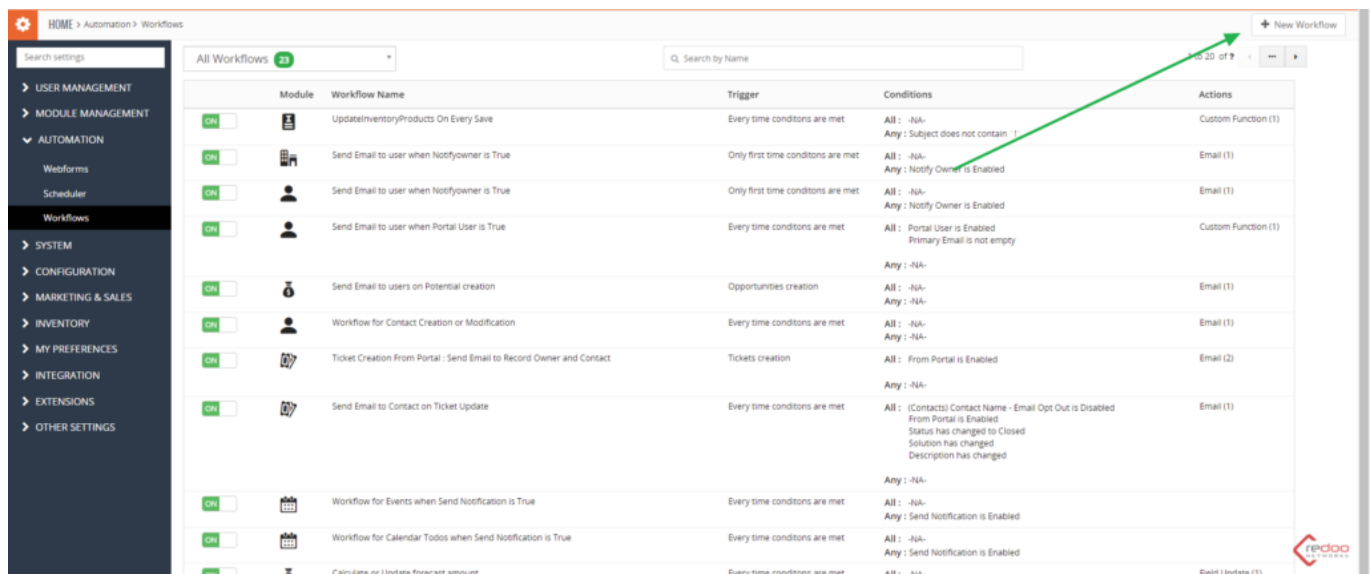
Using the upper fields you can filter the workflows or use the search by name fuction



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



The screenshot displays the 'Automation > Workflows' page. A sidebar on the left contains navigation options: USER MANAGEMENT, MODULE MANAGEMENT, AUTOMATION (with sub-items: Webforms, Scheduler, Workflows), SYSTEM, CONFIGURATION, MARKETING & SALES, INVENTORY, MY PREFERENCES, INTEGRATION, EXTENSIONS, and OTHER SETTINGS. The main content area shows a table of workflows. A green arrow points to the '+ New Workflow' button in the top right corner.

Module	Workflow Name	Trigger	Conditions	Actions
<input checked="" type="checkbox"/>	UpdateInventoryProducts On Every Save	Every time conditions are met	All : -NA- Any : Subject does not contain ' '	Custom Function (1)
<input checked="" type="checkbox"/>	Send Email to user when Notifyowner is True	Only first time conditions are met	All : -NA- Any : Notify Owner is Enabled	Email (1)
<input checked="" type="checkbox"/>	Send Email to user when Notifyowner is True	Only first time conditions are met	All : -NA- Any : Notify Owner is Enabled	Email (1)
<input checked="" type="checkbox"/>	Send Email to user when Portal User is True	Every time conditions are met	All : Portal User is Enabled Primary Email is not empty Any : -NA-	Custom Function (1)
<input checked="" type="checkbox"/>	Send Email to users on Potential creation	Opportunities creation	All : -NA- Any : -NA-	Email (1)
<input checked="" type="checkbox"/>	Workflow for Contact Creation or Modification	Every time conditions are met	All : -NA- Any : -NA-	Email (1)
<input checked="" type="checkbox"/>	Ticket Creation From Portal: Send Email to Record Owner and Contact	Tickets creation	All : From Portal is Enabled Any : -NA-	Email (2)
<input checked="" type="checkbox"/>	Send Email to Contact on Ticket Update	Every time conditions are met	All : (Contacts) Contact Name - Email Opt Out is Disabled From Portal is Enabled Status has changed to Closed Solution has changed Description has changed Any : -NA-	Email (1)
<input checked="" type="checkbox"/>	Workflow for Events when Send Notification is True	Every time conditions are met	All : -NA- Any : Send Notification is Enabled	
<input checked="" type="checkbox"/>	Workflow for Calendar Todos when Send Notification is True	Every time conditions are met	All : -NA- Any : Send Notification is Enabled	
<input checked="" type="checkbox"/>	Calculate or Update forecast amount	Every time conditions are met	All : -NA-	Field Update (1)

In here the create page is divided into blocks

First is Basic Information:

- Workflow Name
- Description
- Target Module
- Status

HOME > Automation > Workflows

Search settings

USER MANAGEMENT

MODULE MANAGEMENT

AUTOMATION

Webforms

Scheduler

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SYSTEM

CONFIGURATION

MARKETING & SALES

INVENTORY

MY PREFERENCES

INTEGRATION

EXTENSIONS

OTHER SETTINGS

Basic Information

Workflow Name*

Description

Target Module: Opportunities

Status: Active InActive

Workflow Trigger

Trigger Workflow On

Opportunity creation

Opportunity updated (Includes Creation)

Time Interval

Recurrence

Only first time conditions are met

Every time conditions are met

Workflow Condition

All Conditions (All conditions must be met)

Add Condition

Any Conditions (At least one of the conditions must be met)

Save Cancel

redoo NETWORKS

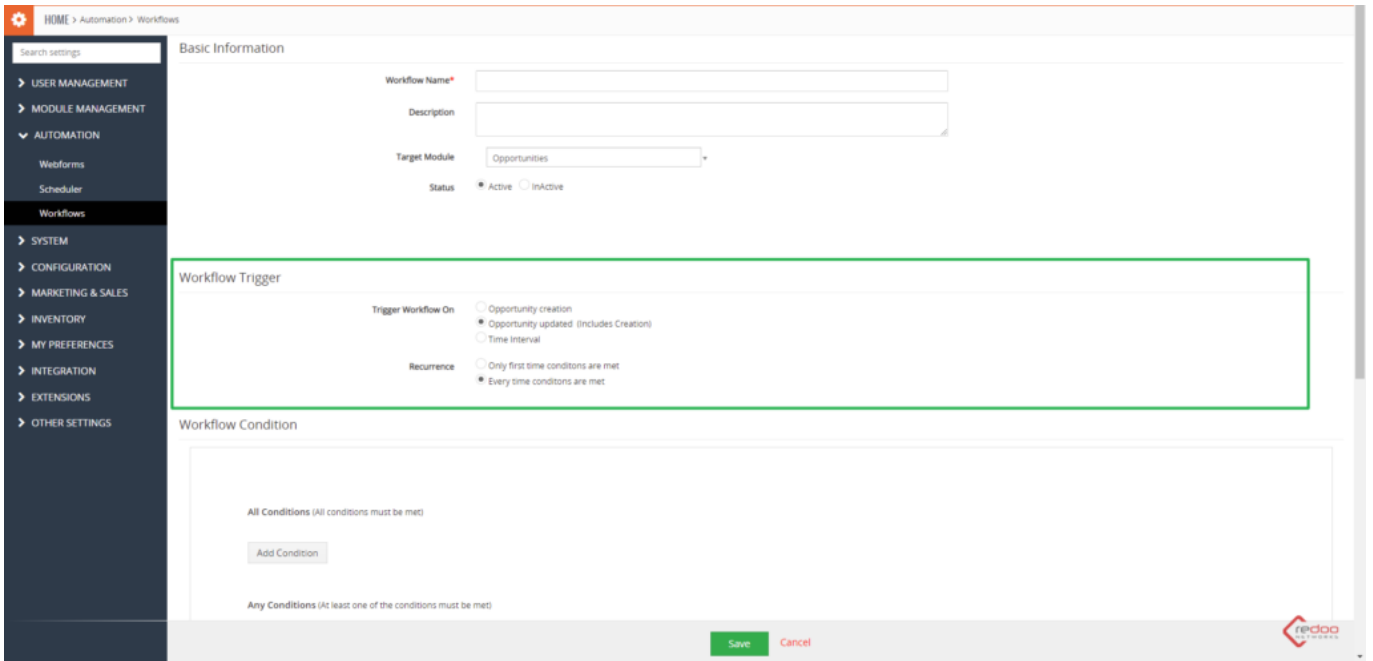
Next is Workflow Trigger:

- Trigger Workflow on

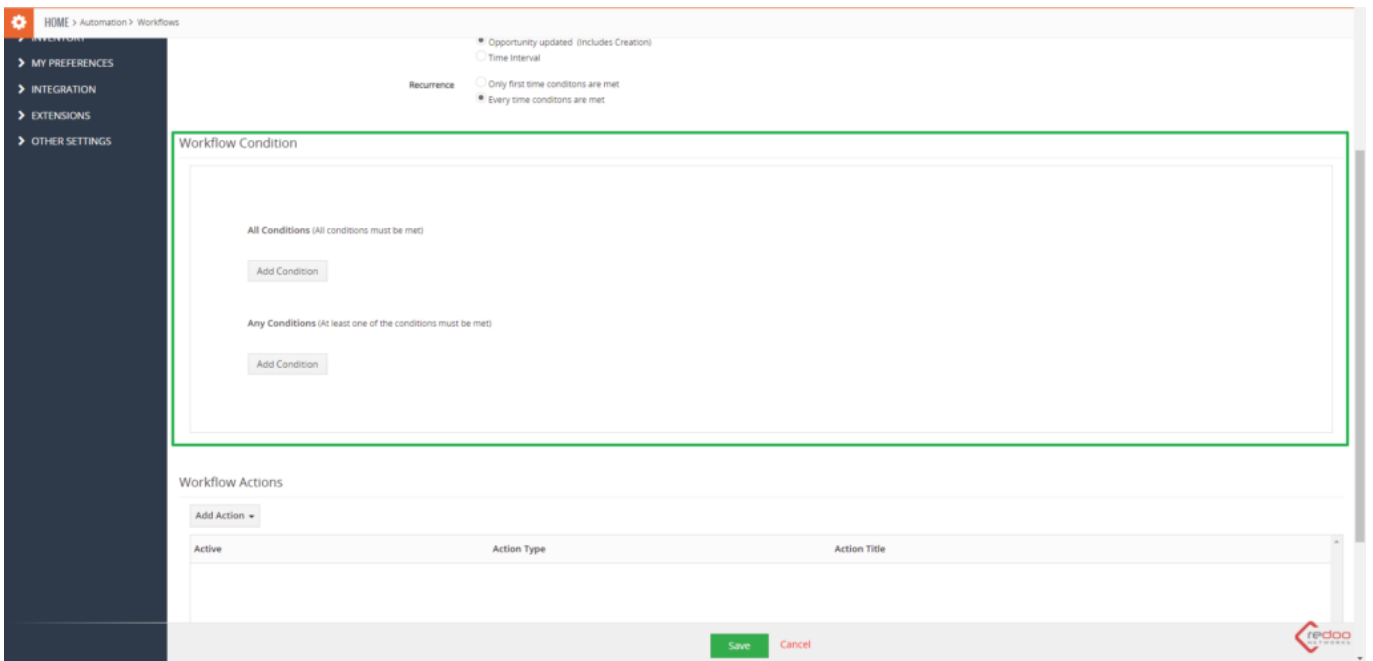
1. Creation
2. Upload
3. Time Interval

- Recurrence

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

