



Workflow Designer

CloudFile Actions

All actions on this page require our [VtigerCRM CloudFile](#) Plugin to work.

Download File

This action allows to download a file from a CloudFile compatible storage.

You select the CloudFile connection, the parent folder and define a, often dynamic, filename to download.

You can also select the parent folder by using the “choose Directory” button.

A typical use case is to download csv file from storages and trigger import processes with the data.

The screenshot shows the configuration interface for the 'Download File' action. It is titled 'Block settings' and includes a 'General Task Options' tab. The form contains the following fields:

- Connections:** A dropdown menu.
- choose parent path:** A radio button, an empty text input field, and a 'choose Directory' button.
- generate parent path:** A radio button (selected), a text input field containing 'download', and a blue 'add' icon.
- name of file to download:** A text input field containing 'export- $[\text{Now},0, \text{Y-m-d}]$.csv' and a blue 'add' icon.
- What to do with the file:** A dropdown menu with the text 'What to do with the file'.

Upload File

You cannot only download file, but you can also upload files from any supported way to generate attachments.

The screenshot shows the configuration interface for the 'Upload File' action. It is titled 'Block settings' and includes a 'General Task Options' tab. The form contains the following fields:

- Connections:** A dropdown menu.
- choose parent path:** A radio button, an empty text input field, and a 'choose Directory' button.
- generate parent path:** A radio button, a text input field containing 'directoryname', and a blue 'add' icon.
- relate files to CRM Record:** A checkbox, a text input field containing 'ID of current Record', and a blue 'add' icon. Below the field is the text 'Leave empty for current record'.
- add files to upload:** A section with a text input field containing 'filestoreid from filestore' and a blue 'add Attachment' button.

Create Directory

This action allows you to create new folders in a Storage, linked with CloudFile.

To make use of this block, you could use the following configurations:

1. Select the Cloud Connection
2. Select the parent path, which should contain the new folder and activate the checkbox, before this field if you use static parent folder
3. Set a custom parent path you generate dynamically and activate the checkbox, before this field if you use static parent folder



Pay attention

If you use a Key/ID Based Storage, like Google Drive, you MUST set the ID, not the path, or activate the checkbox to automatically recognize the ID.

4. Set the name of the new folder
5. If you directly link the new folder to a record, you could activate the checkbox and, if different then current folder, set the ID of the record, you would link to. `{{/lightbox}}`

rename File

This action can only be used for FTP connections. Other provider do not support renaming.

Like the other actions, you define provider, parent folder and old/new filename. Everything can be generated with variables and expressions.

Block settings General Task Options Environment

Only FTP Connections are supported!

Connections:

choose parent path:

generate parent path:

Current Filename:

New filename:

