Workflow Designer

CloudFile Actions

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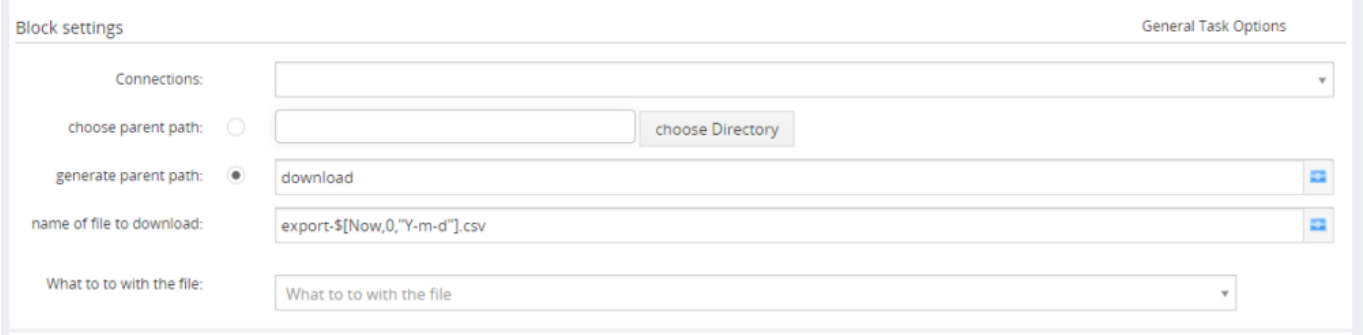
All actions on this page require our VtigerCRM CloudFile Plugin to work.

Download File

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

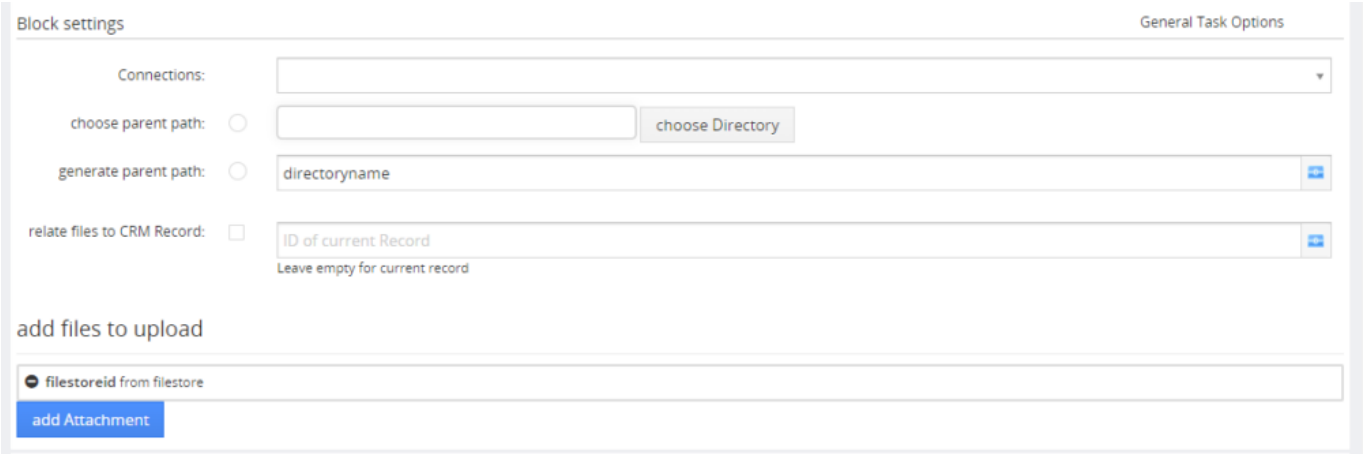
You select the CloudFile connection, the parent folder and define a, often dynamic, filename to download.
You can also select the parent folder by using the “choose Directory” button.

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



Upload File

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



Create Directory

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

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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

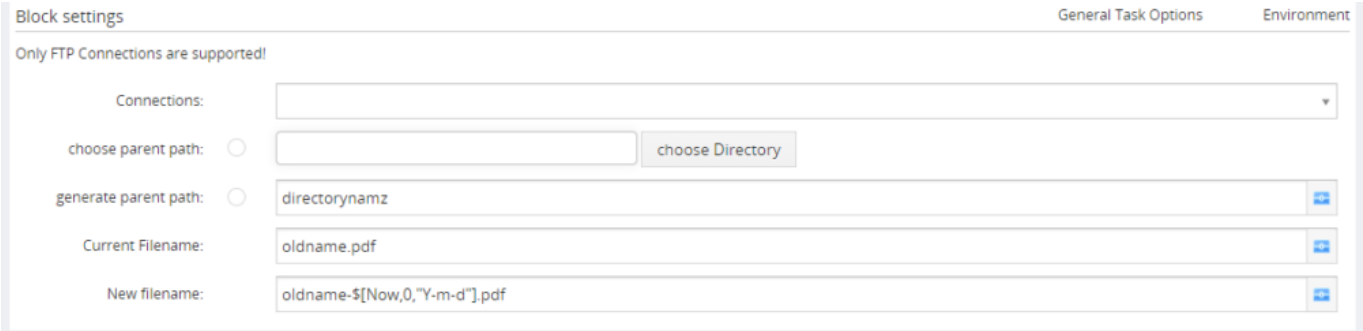
Pay attention
If you use a Key/ID Based Storage, like Google Drive, you MUST set the ID, not the path, or activate the checkbox to automatically recognize the ID.

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.



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