

Workflow Designer

Communication

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send eMail

- could send an email to one or multiple receivers with all default mail options
- Also you could add one or multiple attachments from different places.
  - Results from the following modules: PDFMaker and SQLReports
  - attach every Document related to the current record
  - attach a file from a url, you could generate also from field values
  - *in Documents module*: attach the current file

Store Mail to

This action allows to store a mail from MailScanner to a record.

If you send a quote to a lead, you probably want to see inside the Lead Record, which Mails was send to the lead. This could be done with this field.
You could easily specify a crmid, to which this mail will be stored.
For example:

$crmid	Will store the mail in every module to the current one (Leave empty will have the same effect)
$account_id	Inside Quotes module, will store the mail to the ID from the **account_id** field. (The Organization of the Quote)

You must leave this field empty or set a correct ID of a record.
If you set a wrong value, the mail WILL NOT BE SEND.
If you are not sure, what to do, leave this field empty!

Integrate Access Tracker

Use this checkbox only, if you really work with the the values of accessed mails.
Sometimes a 1×1 counter image will be interpreted as spam category.

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Statistics

The complete SMTP dialogue will be written in the statistic log, to give you the change to see, why a mail wasn't send

Templates

If you want to insert Mail Templates into the Mail Content, you only need to select the template on top of the content field.

The template feature is different then the template feature of Vtiger mail form.
It do not directly insert templates into the editor, but load the template and subject during execution.
This ensure to always use latest version of the the selected template and to be able to load templates from different modules.
The subject will be taken from Template, if there is no subject defined within task configuration.

Next to the default variables from the template module, you also could insert custom content into the template, which is defined with the send mail task.
The custom content is taken from editor of send mail task and will insert on position of a **$mailtext** variable you use within the template.

So you could use defined templates, but also individual content.

Send Pushover Notification

This block allows you to integrate a Pushover Notification at any situation of the vtiger.
For example receive a notification if you get a new ticket or your shop did sell something.

This task need a Pushover Account and a compatible mobile device.

Your Pushover User-Key	Insert your User-Key you see if you login on the Pushover Page

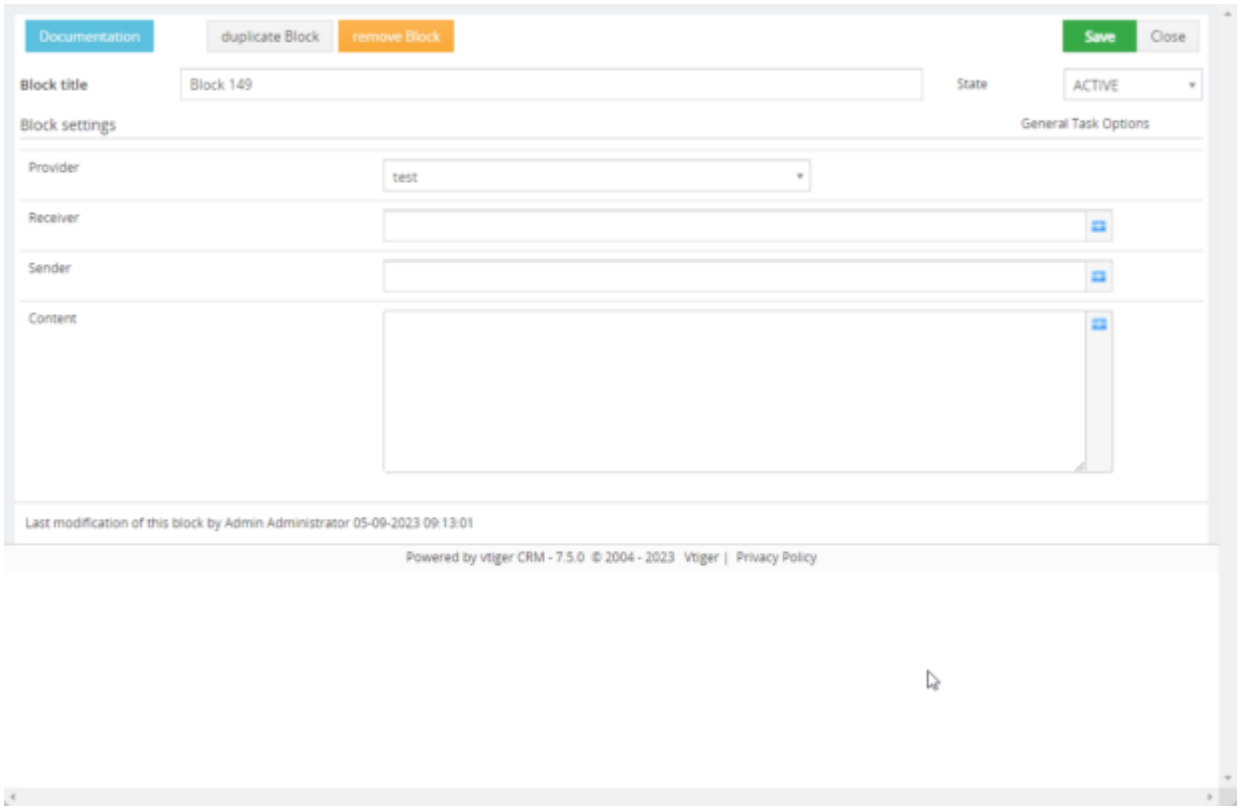
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Send Notification to this Device	Did you have multiple devices and only want to send this notification to one? Insert the device name. *Otherwise leave this field blank*
Subject	The subject of the message
Message	The message you want to send

If you use very much notifications or you want to change the Name of the Application, which sends the Message, you need to create an own Application on the Pushover Apps Page. There are no costs for this step. You get the AppKey for this Application directly after creation. Insert this Key in the **AppKey** Field.

communicate by SMS

Workflow Designer provide support for SMS Providers, you can configure in Provider Manager. When the configuration created, you can use this block to send SMS.



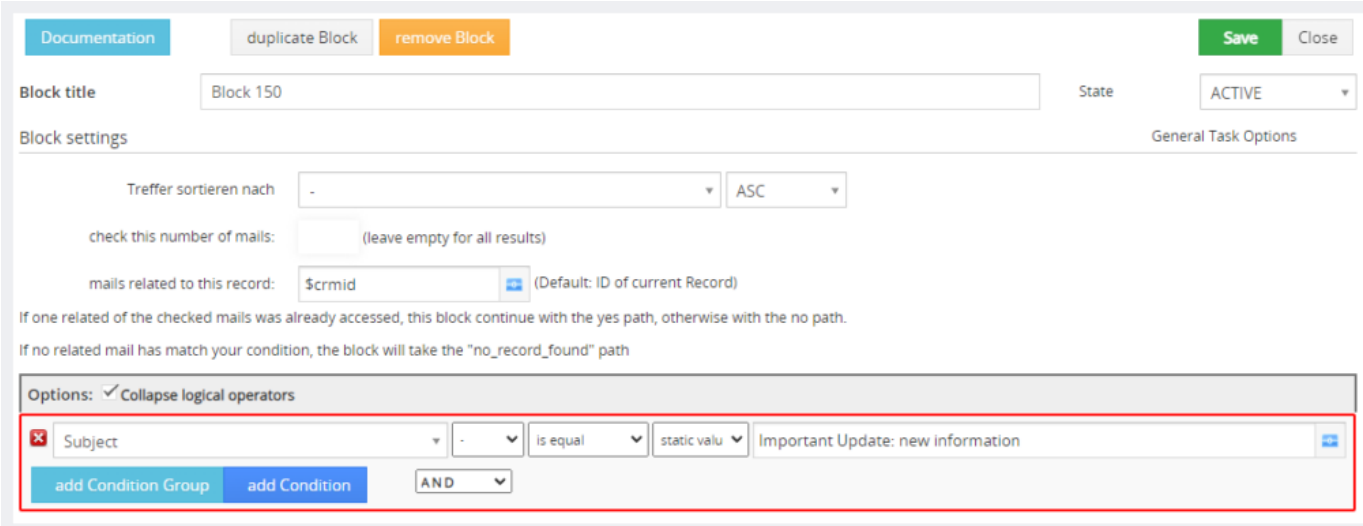
You can configure Receiver and Sender numbers together with the SMS content. All fields support variables and expressions.



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Mail was read

This blocks allows to check, if the vtigerCRM Access Tracker already recognized a “read” event for one or more emails.



You can filter for a dedicated or multiple eMails, related to a record, and make sure at least a defined number is read.

The block have 3 outputs. The top/green one is used, when the requirement to read the amount of eMails is fulfilled.
The middle one is used, when eMails are found, but they are not read.

The last one is used, when there is no such eMails, you defined within the filter.

SMSNotifier – send SMS

When you use and configured SMSNotifier module in VtigerCRM, you can use this action to send SMS over SMSNotifier.

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