Workflow Designer

Inventory Actions

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Convert to Invoice

This action is deprecated and available for backward compatibility. Use the “convert record” record instead.

This task allows you to convert the current Quote or SalesOrder into a Invoice, like the internal routine does.

Additional you could define fields, which you could fill up individually. You have to use this, if you defined custom fields, which should be transfered from the old record into the Invoice.

After the conversation the original Record (Quote/SalesOrder) **will NOT be deleted**. If you want to do this, you need to delete the record manually.

create Inventory entry

The default behavior of this task is equal to the Create Record Task.

This task could be used to create Invoices, Quotes, … with selected Products.
You could specify all values of these modules, like item/group tax or discount.

All other settings are equal to the default record creator.

You could select all products you have created in your vtigerCRM system. Also you could generate the product_id with a custom function. (Services are not supported at the moment)

You can use Inventory Loaders to define the products you add to the records. For example you can add products you select by “select products from records”

Special Environment variables

The fields inside every product have special environment variables to get the default values from the products. Fields with this feature are marked in the image below this text.

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following array to get values from ALL fields inside the product module of the selected module.

```
$env["product"]["..."]
```

For example you could use

```
$env["product"]["unit_price"]
```

to calculate with the default Unitprice of the product.

execute Expression on Products

This Task will execute a custom expression you could create.
This allows you to calculate for example weight of all related products very easy.

You also could select which products should be used to execute the expression with a simple condition.

You could use special variables during the expression, which are loaded from the Inventory Record (Invoice,...)

$quantity	Will contain the Quantity of this inventory item
$unitprice	Will contain the Unit Price of this inventory item
$discount_amount	Will contain the static discount amount of this inventory item
$discount_percent	Will contain the percentage discount of this inventory item

Also you could access every Field of the used Product Record.

add Product

This task allows you to add a product to anexisting Invoice/Quote/...

As example you can add a reminder fee to an unpaid invoice.
Functions of the product block is equal to the Create Inventory Entry action.

reverse/cancel Inventory

This task will duplicate your record and multiply every quantity with -1 to allow you cancel an

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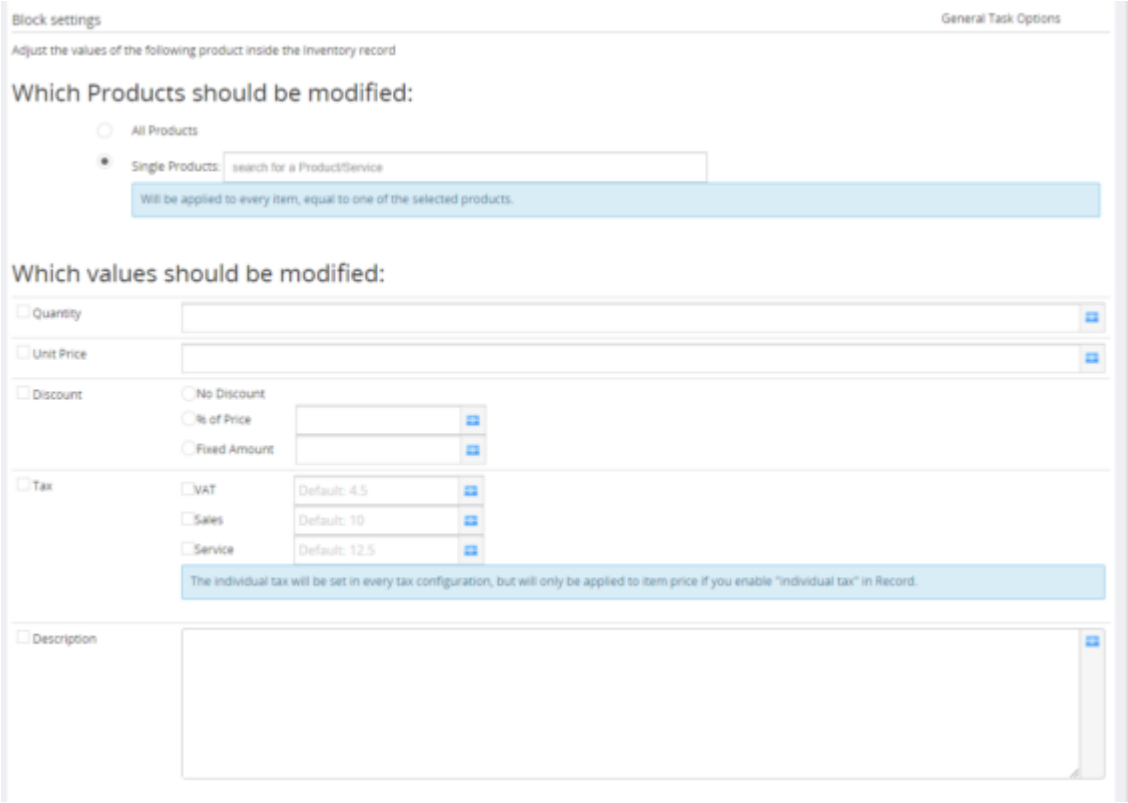
invoice.
Every quantity and the shipping cost will be negate to get the same total like the original record.

Additionally you could change single/multiple fields or add new products, for example cancellation fees.
The functions are equal to the create Inventory Entry action.

adjust product values

This action gives you the opportunity to adjust details of related products of an inventory record. You can either adjust all products or only these, which matches some defined products.



Only checked values will be touched/changed. You can access product data within $env[“item”]

adjust global tax

This blocks adjust the values within global tax fields.

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