Workflow Designer

Record Management

Copy a Document to Dropbox

This block requires an Dropbox Account!

The configuration is realy simple.

1. You need to connect your Dropbox Account to this task. Every of this task could have it's own Dropbox connection, to allow different Accounts.
2. Click on the directory you want to use to store the Document within
3. Also you could use a **custom expression** to create a dynamically directory inside the selected one. (For example to create monthly directories, like 2014-01, 2014-02, …)

Create Comment

This action allows you to automatically create comments in the executed or a related entity.

Process Example

- add a comment to Contacts if you change some values
- add a comment to the Organization if you interact with a Contact from this company
- add a Comment to the Organization if you send a reminder for an invoice

Custom IDs

You could choose "custom" as record ID to show a textfield, which could be used to generate the record ID, which will be used for comment creation.
This textfield could also generate a comma separeted list of record IDs. Every ID will be used to create an equal comment.

create Record/Task/Event

You could create records, which don’t have to be related to the record of the workflow.
All documentation from “set value” action can also applied on this action.

Calender entries

There are individual actions for calendar entries, because they have to be created in a special way.
Please pay attention what type of Calender Record you want to create. (**Event** or **Task/Todo**)

Because of a different internal handling, you must only enter the start date in the field “Start date & time”.
Also to create a todo it is required to set the Due Date manually by Workflow Designer.

Reminder

If you want to use the Reminder Feature of Vtiger, you could write any value into the field “Send Reminder”.
This value will be interpreted as “minutes before the event”, which will be written to the correct values.

Environment

If you click the “Environment” link in the action configuration you could enter a environmental variable, which should hold the id of the created record. This ID could be used later in the workflow.

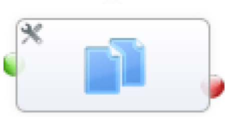
duplicate record check

This is a new feature, which will check the fields you configure for already existing records, before creating the new record.
If you set to check E-Mail and LastName field, the task will be search for already existing records with the same E-Mail and LastName Value, like the one you want to create. If they exist, the record won’t be created.
But if the Task have found an already existing duplicate Record you could configure fields, which will be updated from the configuration you configured for the new record.

To get a check, if the record was created new, you could use the new environmental variable “was_created_new”, in the task configuration. (click on “Environmental” to expand the variable configuration)

If the record was created new, these variable will contain a “true” and if not “false”.

Duplicate Record



This Task could duplicate a record you specify.

The easiest way is to duplicate the current record, which execute this workflow. To do this you should choose the current Module and insert “$id” into field ”duplicate following Record ID”.

But you also could duplicate every other record with this task. For example you have an Account, which want to renew a contract. You could manually choose the invoice and duplicate the record manually.

But you could also found the ID of an related Invoice record from Accounts, duplicate the Invoice and refresh some dates.

You also could define fields you want to manipulate with special values, like the “Set values” does.

Read/Write Entitydata

[Read the Explanation of Entitydata here]

Read EntityData

Transfer a value from EntityData, of a defined record, into an $env variable, you define.
The value in EntityData is not deleted with this action.

Write EntityData

Write a value into EntityData of a defined record. The value can be created by using variables and expressions.

Remove Record

This task remove the current Record!
You couldn’t interact with the entity after this action.

Also you should create a redirect for the user, if you include this task in a “start on every save” or “start on every creation” Workflow.
Otherwise the User will see an error message.

Don’t use this block during a immediately executed Workflow, which interact with the Webform.
This will lead to an error for your customers!
You could use this block in such workflows if you delay the execution.

Set Value

This action can change values of records.

You could generate the values you want to set with 3 opportunities:

- **static value** (Default)
  The value will be generated by the default template textbox
- **function**
  You could create a custom expression, which returns the new field value. This function needs to be valid custom expression code. You could also use custom expressions in the static values box, but need to use <?php return ; ?> there.
- **fieldvalue**
  Load the new value of the field from another field from this or a related record

set References

If you want to create a Relation between two records, you need to set the ID of the other record.

Example

You want to create a Contact from Organization and want to set the “Organization” Field to the current Organization. You only need to set the field “Organization name” to “$id” **(not $accountname)**.
All available ID’s are listed on top of the Drop Down List you get on the blue icon next to the text field. (ID of current Record)

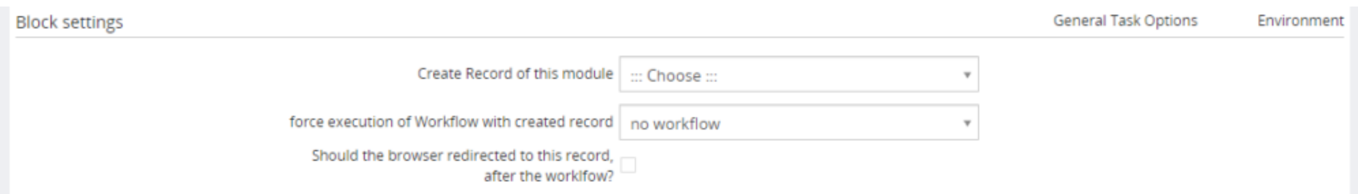
This works for all linked fields and also fields inside Projects, Tickets, Events,.. where you could choose between different modules

modify tags

You are working with tags in vTigerCRM? Then you can add/remove/toggle tags with this action to any record within a workflow.

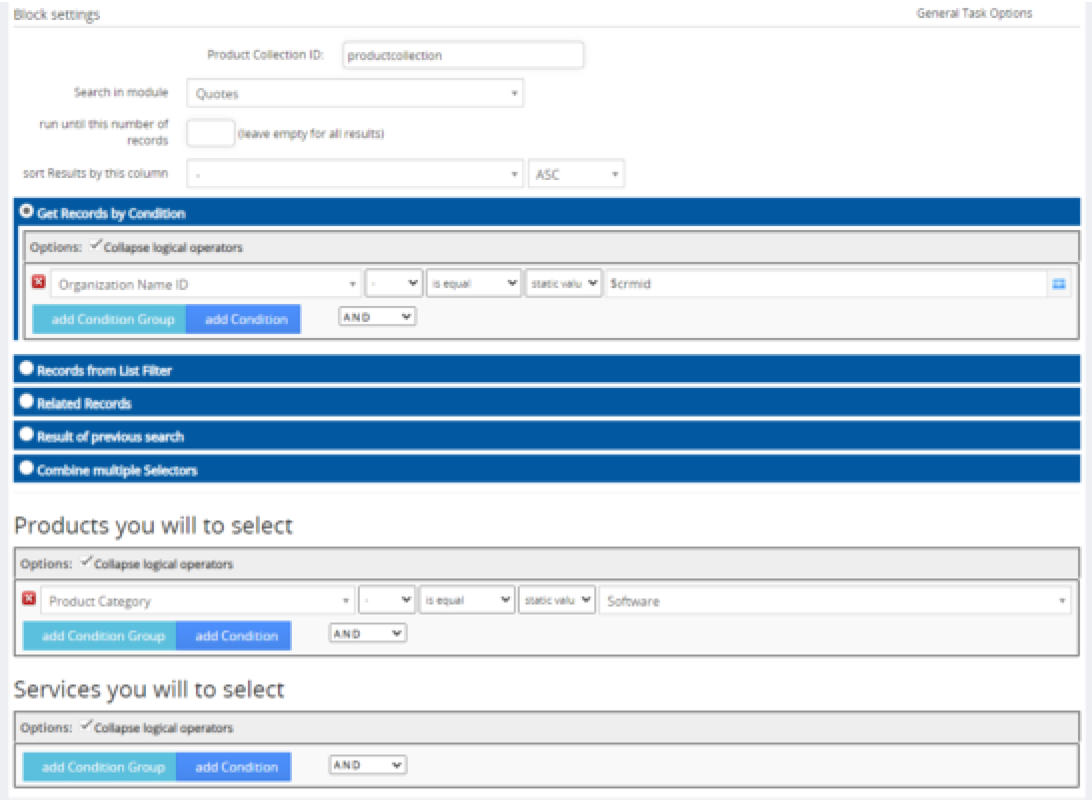
convert record

This blocks convert the current record into another module type. The current record isn’t modified during the process.
Use this to convert Quotes into SalesOrder/Invoice or leads into Contacts.



select Products from Records

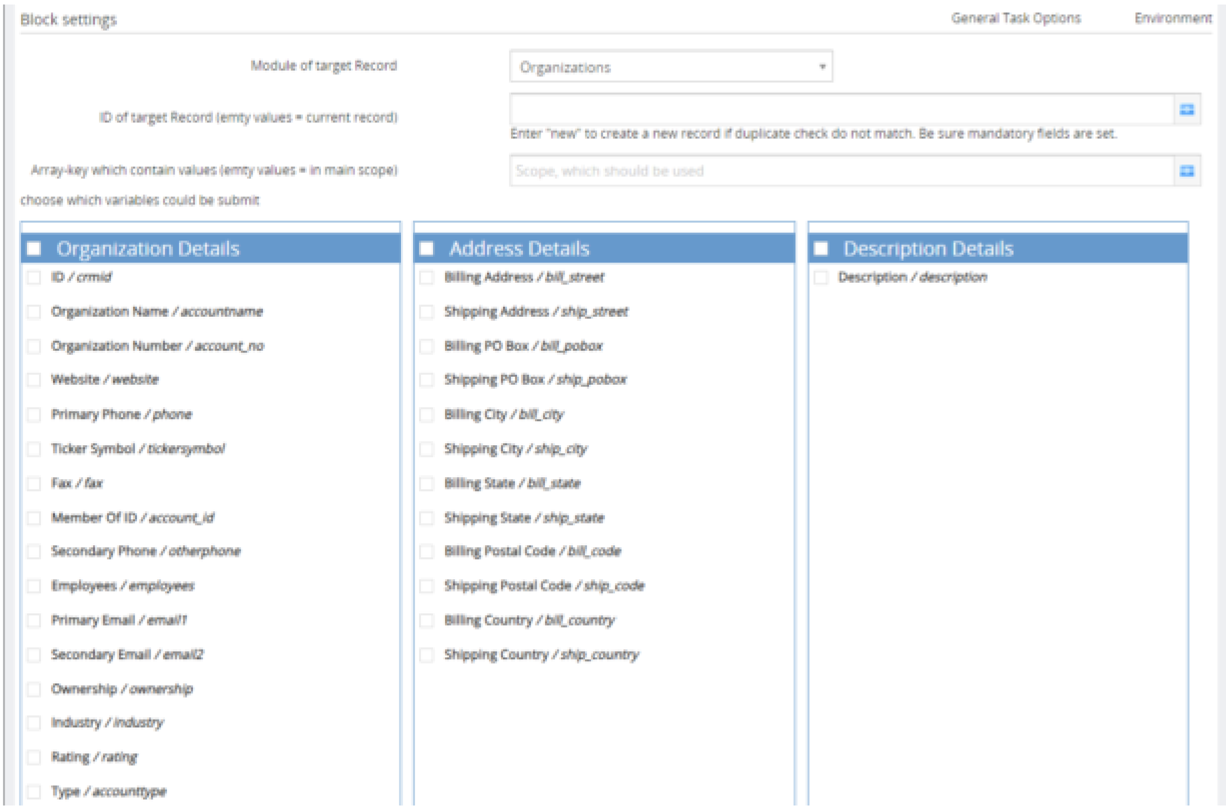
Sometimes you need to select specifics product or services over multiple records, you specify.
Use cases are to collect all software an organization ordered and then use them within "Create inventory records"



write request values

This action is most efficient within workflows, you execute over HTTP Handler.
It takes values from the HTTP request and update a record based on this values (or creates a new record)

Within selection you define the variable, which contains the fields and select fields, which should be updated from request. Only select as less as needed to not allow updating any field by http request.


Block settings
General Task Options
Environment
Module of target Record
Organizations
ID of target Record (emty values = current record)
Enter "new" to create a new record if duplicate check do not match. Be sure mandatory fields are set.
Array-key which contain values (emty values = in main scope)
Scope, which should be used
choose which variables could be submit
Organization Details
ID / crmid
Organization Name / accountname
Organization Number / account_no
Website / website
Primary Phone / phone
Ticker Symbol / tickersymbol
Fax / fax
Member Of ID / account_id
Secondary Phone / otherphone
Employees / employees
Primary Email / email1
Secondary Email / email2
Ownership / ownership
Industry / industry
Rating / rating
Type / accounttype
Address Details
Billing Address / bill_street
Shipping Address / ship_street
Billing PO Box / bill_pobox
Shipping PO Box / ship_pobox
Billing City / bill_city
Shipping City / ship_city
Billing State / bill_state
Shipping State / ship_state
Billing Postal Code / bill_code
Shipping Postal Code / ship_code
Billing Country / bill_country
Shipping Country / ship_country
Description Details
Description / description

