



Workflow Designer

Relations

add related Record

This task allows you to create relations of records, which is not referenced by a field value, for example documents or comments.

The configuration is very simple:

1. Select the module, within the records are you want to relate
2. Select the maximum number of records you want to transfer
3. Select the record ID you want to assign to (Leave empty to assign to current record)

Then you need to select the records you want to relate.

To do this you have 2 options:

1. use a default Filter to select single records by ID, Name or something else
2. Use the "is related to" condition operator, which is available for the ID column
 1. With operator allows you to select ALL records, which are related to the record ID you specify in the text field.

You could use the last option to transfer all related records, for example comments, from one record to another.

To transfer comments from a Contact to Organization, use the following setting:

Module	Comments
Related records to this target record	<code>\$account_id</code>
Filter:	ID <is related to> <code>\$crmid</code>

exists related Record

The same function like [conditions](#), but you can check the related entities only

Also you could set the minimum number of hits, the task should find to return "true".

1. At first choose a related module from the current one you want to check
2. set the number of entries the search must found to return "true". (Default = 1)
3. Define the condition

