eNumber 2016 - Workflow

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eNumber 2016

Using Workflow to autonumber records

Description

Out of the box, eNumber is generally used to generate a serialised record number or name when the record is first created. It does this using a plugin which is fired when a record is created.

Some business processes require that a number is generated when a specific requirement is met: an opportunity reaches a certain stage, or a quote is activated or accepted. These special cases are now catered for using the workflow plugin included with eNumber 2016.

Prerequisites

To begin using the eNumber workflow plugin, you will need to have the following:

1. A regular eNumber rule to define the name/number format and which entity and attribute the numbering will be applied to
2. A text attribute for the number to inserted into. Note that unlike regular eNumber generation, you **cannot use the standard CRM autonumber fields** for this (Account Number for example). This is because these special fields cannot be updated after the record is created. You will need to create your own field instead, and hide the standard CRM number field on the form.

Setting up

1. After setting up the eNumber rule for your entity and attribute, you must **disable** the rule record. This will stop the rule from running when the record is created.
2. Next, create a new Workflow Process. The process should be set to run *synchronously*, so **uncheck "Run this workflow in the background"**:

Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *	Autonumber Quote when Ready is ticked
Category: *	Workflow Entity: * Quote

☐ Run this workflow in the background (recommended)

Type: ⦿ New blank process
       ○ New process from an existing template (select from list):

3. You may now set up the workflow according to the needs of your business process. For this example, we will be assigning a number to a Quote record when a specific checkbox is ticked:

4. Next, we need to add a conditional step that will check that the status of our checkbox is "Yes" (ticked), and that we haven't already generated an autonumber for the record. The second condition is important if we don't want to regenerate the number every time the checkbox is unticked and re-ticked:

5. Inside the conditional step, add a new step choosing the eNumber workflow plugin (usually located toward the bottom of the add step dropdown). Click Set Properties:

6. Choose the rule which you set up to generate the autonumber. Because the rule is inactive, you will need to switch to the "Inactive Auto Name/Number Rules" view to find it.

You can now activate the workflow process and test that the autonumbering works by fulfilling the requirements of the rule