

eNumber 2016 - Workflow

Created by MyCRM Ltd

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: *

Category: * Entity: *

Run this workflow in the background (recommended)

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

- 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:

Process Name *

Activate As

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Options for Automatic Processes

Scope

Start when:

Record is created

Record status changes

Record is assigned

Record fields change

Record is deleted

Execute as:

The owner of the workflow

The user who made changes to the record

Entity

Category

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Select Fields

Select the fields that the process will monitor for changes.

<input type="checkbox"/>	Display Name ▲	Name	Type
<input checked="" type="checkbox"/>	Quote Ready	new_quoteready	Two Options
<input type="checkbox"/>	Record Created On	overriddencreation	Date and Time

- 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:

| |

▼ Type a step description here.

If **Quote:Quote Ready equals [Yes] AND Quote:Our Autonumber does not contain data**, then:

- Type a step description here.

MyCRM.Extended.eNumber.Plugins (1.0.0.0):MyCRM.Extended.eNumber.Plugins.AutonumberWorkflow

- 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:

Process: Autonumber Quote 2

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Autonumber Rule	Lookup	Optional	<input type="button" value="Account Number"/>

- 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

