









Workflows

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Overview

Workflows are used to define status flows for different record types.

These flows are used to set, which status follows the next one and in what order they should be changed.

<input type="checkbox"/> NAME ^	DOCUMENT TYPE	STATUS CATEGORY	ACTIONS
<input type="checkbox"/> Leads status flow	Leads	Lead status	 
<input type="checkbox"/> Opportunities status flow	Opportunity	Opportunity status	 
<input type="checkbox"/> Packing work order	Packing Work Order	Work orders Default Status	 
<input type="checkbox"/> Quote status flow	Quote	Quotes Default Status	 

Create new workflow

This action requires the "**create new workflow**" permission.

New workflows can be created through the [Create new workflow](#) form.

Home / Add workflow

Basic information

NAME *
Enter name

DOCUMENT TYPE *
Select document type

STATUS CATEGORY *
Select status category

Workflow steps

Fill workflow document type

After save, create another Save

There should be only **one workflow for** every **status category of** a certain **document type**.

Workflow steps

workflow steps define how a record can move between statuses (from which status into which status). Available statuses for the workflow steps depend on the selected "status category".

Once a workflow is created, only statuses, defined in workflow steps will become valid. Any other status within the selected status category of the document type will result in an error.

Order items

USER
Nejc Frece Žohar, nejc.frece.zohar@dewesoft.com

STATUS
NEW

PRODUCT	QUANTITY	
	1	<button>Add</button>

PRODUCT	QUANTITY	ACTIONS
No data for table		

Save

Goods transfer 0 ▼

File manager 0 ▼

Comments 0 ▼

Update existing workflow

This action requires the "**update workflows**" permission.

Delete workflow

This action requires the "**delete workflow**" permission.

Workflows can be deleted.