

Exercise 6

Description:

In this exercise you are going to use the email notification (by trigger) and exporting variables to a txt file.

Requirements:

- PC Client or MFP Client;
- Random Testing document;
- Email server;
- Northwind Database (Copy it to your C-Drive, somewhere);
- AD server;
- There must be an existing user with an email address defined

How to do:

1. Create a new workflow with the name: "Scan to MyCRM" (note that 'MyCRM' is just a random name)
2. Drag a client capture module (PC client or MFP based on the used client)
3. Create Selected question with a SQL-based item list:
 - Question/Buttonname: Customer
 - Variable: CUSTOMER
 - Item list:
 - Name: nwind customers
 - Type: SQL
 - Connection string: Use the button to create it. Use "Microsoft Jet 4.0 OLE DB Provider"-driver and the location where you copied the database.
 - At the SQL-query, click the (3-dots) button and select "Customers"
 - Select Column Displayed: CompanyName
 - Select Column Returned: CustomerID
4. Drag the "Windows File System" Connector and configure it with the following settings:
 - Folder: C:\Output\ScanToMyCRM
 - Filename: Document %YY%-%MM%-%DD% %HH24%.%NN%.%SS%.%FFF%
5. As output profile we select a normal PDF, so not a Searchable PDF (edit the default selected output profile and uncheck OCR)
6. Drag the Data Export module and configure it with the following settings:
 - Export all variables: unchecked
 - Contents:
CustomerId=%CUSTOMER%
 - Folder: C:\Output\ScanToMyCRM
 - Filename: Document %YY%-%MM%-%DD% %HH24%.%NN%.%SS%.%FFF%
7. Add a Mail trigger on the Windows File System route with the following settings:
 - From: test@mail.com
 - To: %USEREMAIL%
 - Subject: Your document was processed
 - Body: Your document with the following details was processed:
Filename: Document %YY%-%MM%-%DD% %HH24%.%NN%.%SS%.%FFF%.pdf

The document will be imported automatically into MyCRM.

8. Make sure "User Single Sign On" in Users section is enabled with at least 1 AD profile enabled (AD users require to have the email address set as well otherwise variable will be empty)
9. Save the settings

Now you can use the PC Client or the MFP client to import or scan a document to the workflow "Scan to MyCRM".

There will be a PDF and a TXT created. There are a lot of applications that supports importing files by using a TXT or XML file with the additional information.

The workflow will also send an email to the user who scanned the document.