Workflow Elements

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With Workflow Elements you'll be able to build incredibly powerful workflows that used to require code. Hundreds of organizations have used these activities to save countless time and money, and the limits are just your imagination.

Some of the new workflow tools let you:

- **Query Dynamics 365**
    - Build a view of records and include the results in an email. You can even filter records relative to your workflow record, like orders for this specific contact!
    - Check to see if a record exists and create it if it doesn't.
    - Use FetchXml aggregations too! Get the total amount of a customer's orders for the last 6 months.
- **Take Advantage of Word Templates**
    - After you generate a Word Template, rename it so they don't all have the same name. Generating an invoice? Rename it with the invoice number.
    - Want to send that invoice or receipt to a customer? Now you can attach the document to an email.
- **More Sales Options**
    - Want to remove a line item from an Opportunity, Quote, Order or Invoice? No problem.
    - Want to add new products to your Opportunity, Quote, Order or Invoice? Write-in or exiting products? You got it.
    - Convert a quote to an order, or an order to an invoice

You can do all this and so much more with Workflow Elements, always free from Aiden Kaskela and Kaskela Solutions.