



Mawens Workflow Helper Tool

Version 1.0.1.7



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I What is a Workflow in Dynamics CRM?

You can extend the functionality of Microsoft Dynamics CRM by creating workflows. You can use a workflow to model and automate real world business processes.

These processes can be configured to run in the background or in real time and can optionally require user input. Workflow processes can start automatically based on specified conditions or can be started manually by a user.

II What is Mawens Workflow Helper Tool?

Using Mawens Workflow Helper Tool you can extend out-of-box functionality of Dynamics CRM in below 6 categories:

- I. Child Items
 - Execute Process for Childs from Child
 - Execute Process for Childs from Parent
- II. Date Functions
 - Add or Count Business Days
 - Add or Subtract Days
 - Difference Between Days
 - Format Date
 - Now
 - Parse Date
 - UTC and Local Time Converter
- III. Numbers Functions
 - Calculation
 - Convert Number Value
- IV. Strings
 - Apply Regex
 - Contains
 - Encrypt Text
 - Generate Password
 - Replace
 - String Length
 - Substring
 - Trim
 - URL Encode Decode
 - Upper and Lower Case
 - Word Count



V. Tools

- Execute Process (For Child and Parent Entity)
- Execute Process with Query
- Execute Rollup Field Calculation
- Retrieve Guid

VI. Users

- Check User in Role
- Check User in Team
- Get User Roles
- Retrieve Initiating User

III Accessing to Mawens Workflow Helper Tool

First you must login Dynamics CRM Web interface and navigate Settings->Processes from menu.

Using "New" button you can access create a new workflow or you can select and open an existing workflow from the list.

In workflow design screen, you can access to Mawens Workflow Helper from bottom of "Add Step" menu.



General Administration Notes

Add Step ▾ | Insert ▾ | Delete this step.

Stage

Check Condition

Conditional Branch

Default Action

Wait Condition

Parallel Wait Branch

Create Record

Update Record

Assign Record

Send Email

Start Child Workflow

Perform Action

Change Status

Stop Workflow

Mawens Workflow Helper ▶

Mawens Auto Number Workflow ▶

ChildItems - Execute Process for Childs From Child

ChildItems - Execute Process for Childs From Par...

Date - Add or Count Business Days

Date - Add or Subtract Days

Date - Difference Between Days

Date - Format Date

Date - Now

Date - Parse Date

Date - UTC and Local Time Converter

Numbers - Calculation

Numbers - Convert Number Value

Text - Apply Regex

Text - Contains

Text - Encrypt Text

Text - Generate Password

Text - Replace

Text - String Length

Text - Substring

Text - Trim

Text - URL Encode Decode

Text - Upper and Lower Case

Text - Word Count

Tools - Associate or Disassociate

Tools - Execute Process

Tools - Execute Process with Query

Tools - Execute Rollup Field Calculation

Tools - Retrieve Guid

Users - Check User In Role

Users - Check User in Team

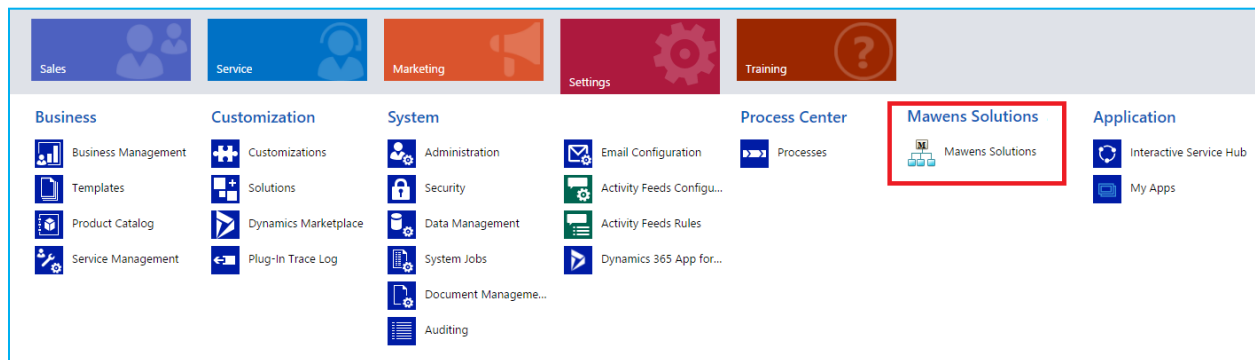
Users - Get User Roles

Users - Retrieve Initiating User



IV License

When you installed Mawens Workflow Helper Tool solution, it will automatically create required entities. You can access them under Settings->Mawens Solutions menu items.



At first work, workflow activity will create “Serial Key” item. If you already have a valid license number, you can change “Serial Key” value. Trial version will not work after 30 days.

MAWENS SOLUTION : INFORMATION

Workflow Helper Tool

General

Name *

Workflow Helper Tool

Identifier

--

Created On

5/12/2017 2:16 PM

Created By

Mawens Admin

Mawens Solution	Name ↑	Value	Secure Value	Created On	
Workflow Helper Tool	Serial Key	KXEQU-PAYAN-...		5/12/2017 2:17 PM	

V About Mawens Business Solutions

Mawens Business Solutions, with its expert team and history of successful large-scale projects in the constantly emerging IT sector, is offering its customers professional solutions using the latest technology. Its own vision, qualifications, experience and values it possesses, Mawens is committed to creating custom tailored solutions for the organization by integrating the dynamic processes taking place in Information Technology with the needs of the organisations.

Mawens is trying to change companies to “New Generation Organisation”. Mawens aims to unleash the true potential of organisations to establishing software infrastructures works with the organisation ecosystem including a complete manner the entire process is allowing person in the team independently access to system without time and location. These are done via applying right “Business Model” and “Change



Management” methodologies to including with accurate, fast and easy way to communicate for uncover the customer experience.

Mawens Business Solutions has delivered hundreds of projects in this regard has taken its place among the most trusted software companies, with offices in located in Turkey and United Kingdom. It is not just focusing to organisations’ today also focusing to tomorrow on delivering next-generation solutions that will allow you to be ready.

For more information please visit: <http://www.mawens.co.uk>

VI Child Items

1 Execute Process for Childs From Child

Input Parameters

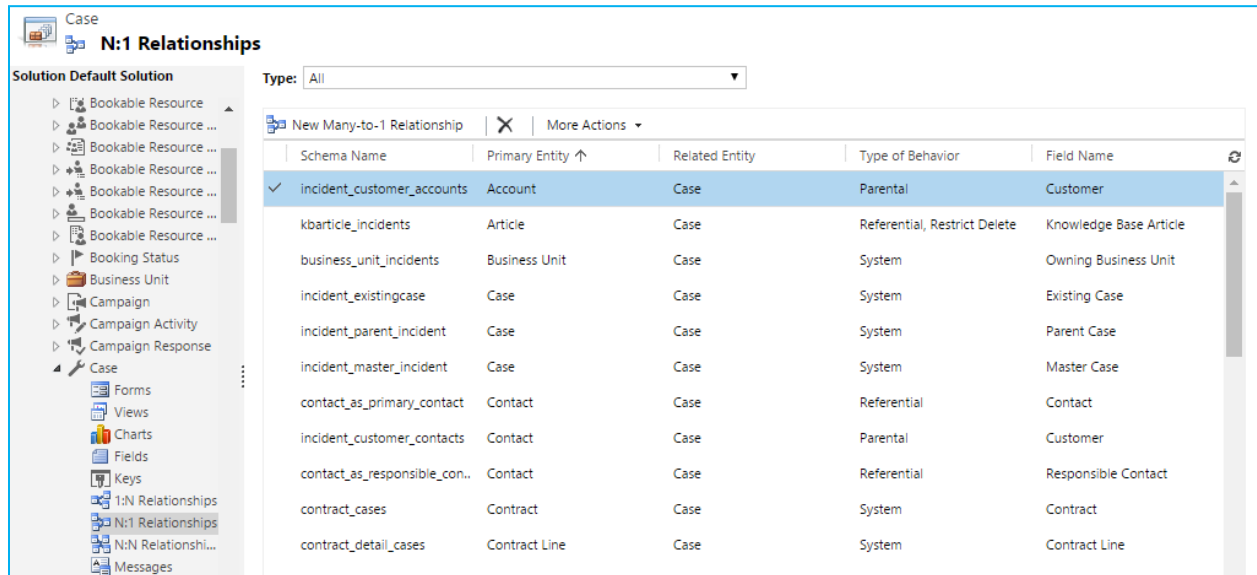
Parameter	Type	Default
Relationship Name	string	
Process	EntityReference - ReferenceTarget("workflow")	

Output Parameters

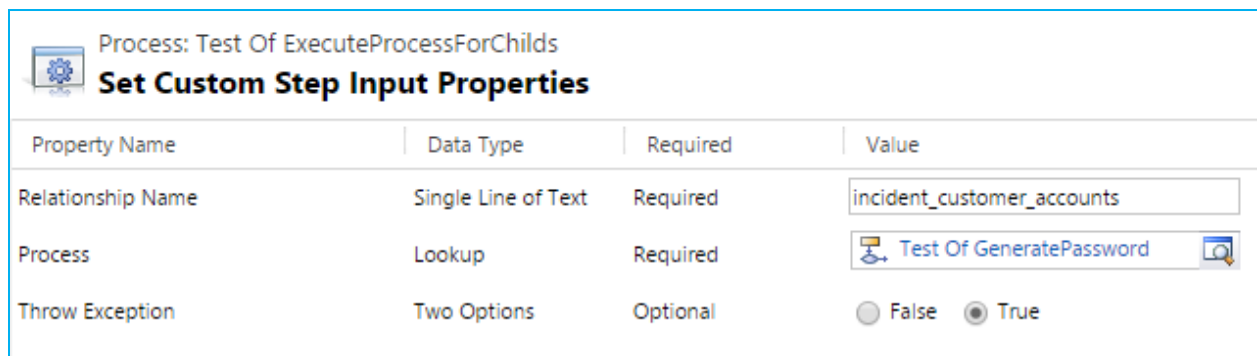
Parameter	Type	Default
Result	bool	

Using this step, you can trigger any process on child items of a parent record.

"Relationship Name" is name of relationship between entities via fields. You can find this value under Entity relationships section in customisations. For example, if you want to trigger a workflow on case records, when something happened on parent account record, you must give the relationship schema name (in this example: "incident_customer_accounts") You can see from below screenshot.



If successfully executed your process on child records, the output parameter returns "True".



2 Execute Process for Childs From Parent

Input Parameters

Parameter	Type	Default
Parent Record URL	string	
Relationship Name	string	



Child Item **EntityReference -**
Process **ReferenceTarget("workflow")**

Output Parameters

Parameter	Type	Default
Result	bool	

Using this step, you can trigger any process on parent items of a child record.

The "Record URL" input parameter is the corresponding entity registration link which is parent entity record.

"Relationship Name" is name of the relationship between entities via fields. You can find this value under Entity relationships section in customisations.

For example, if you want to trigger a workflow on account records, when something happened on child case record, you must give the relationship schema name (in this example: "incident_customer_accounts") You can see from below screenshot.

Type:	Schema Name	Primary Entity	Related Entity ↑	Type of Behavior
New 1-to-Many Relationship	CreatedAccount_BulkOper...	Account	Bulk Operation Log	System
✓	incident_customer_accounts	Account	Case	Parental
	account_connections2	Account	Connection	System
	account_connections1	Account	Connection	System
	contact_customer_accounts	Account	Contact	Parental
	contract_customer_accounts	Account	Contract	Parental
	contract_billingcustomer_a...	Account	Contract	Referential, Restrict Delete
	contractlineitem_customer...	Account	Contract Line	System
	account_customer_relation...	Account	Customer Relationship	System
	account_customer_relation...	Account	Customer Relationship	System
	Account_SharepointDocu...	Account	Document Location	System
	Account_DuplicateBaseRec...	Account	Duplicate Record	System
	Account_DuplicateMatchin...	Account	Duplicate Record	System
	Account_Emails	Account	Email	Parental
	Account_Email_SenderApp...	Account	Email	System



If successfully executed your process on parent record, the output parameter returns "True".

Process: Test Of ExecuteProcessForParentFromChilds

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Record URL	Single Line of Text	Required	(Record URL(Dynamic)(Customer (Conta
Relationship Name	Single Line of Text	Required	incident_customer_contacts
Process	Lookup	Required	Test Of WordCount
Throw Exception	Two Options	Optional	☐ False ☒ True

VII Date Functions

1 Add or Count Business Days

Input Parameters

Parameter	Type	Default
Start Date	DateTime	1900-01-01T00:00:00Z
End Date	DateTime	1900-01-01T00:00:00Z
Days To Add	int	0
Just Retrieve Business Days Count	bool	False

Output Parameters

Parameter	Type	Default
Result Date	DateTime	1900-01-01T00:00:00Z
Result Business Days	int	

The function has two different modes, which vary according to the "Just Retrieve Business Days Count" input parameter.

Result Business Days Mod:



It calculates the number of working days between two dates.

Mandatory input parameters "Start Date", "End Date" and output parameter "Result Business Days".

Process: Test Of AddOrCountBusinessDays ResultBusinessDays

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Start Date	Date and Time	Required	{Created On(Case)}
End Date	Date and Time	Optional	{Modified On(Case)}
Days To Add	Whole Number	Required	0
Just Retrieve Business Days Count	Two Options	Optional	☐ False ☒ True
Throw Exception	Two Options	Optional	☐ False ☒ True

Result Date Mod:

Adds the workday as a "Days To Add" value to the "Start Date" date and returns the result as "ResultDate".

Process: Test Of AddOrCountBusinessDays ResultDate

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Start Date	Date and Time	Required	{Created On(Case)}
End Date	Date and Time	Optional	1/1/1900  12:00 AM 
Days To Add	Whole Number	Required	25
Just Retrieve Business Days Count	Two Options	Optional	☒ False ☐ True
Throw Exception	Two Options	Optional	☐ False ☒ True

2 Add or Subtract Days

Input Parameters



Parameter	Type	Default
Date	DateTime	1900-01-01T00:00:00Z
Add or Subtract	bool	False
Years To Add or Subtract	int	0
Months To Add or Subtract	int	0
Weeks To Add or Subtract	int	0
Days To Add or Subtract	int	0
Hours To Add or Subtract	int	0
Minutes To Add or Subtract	int	0

Output Parameters

Parameter	Type	Default
Result	DateTime	1900-01-01T00:00:00Z

The function has two different modes which vary according to the "Add or Subtract" input parameter.

Add Mode:

It inserts values of input parameters "Year", "Months", "Weeks", "Days", "Hours" and "Minutes" into the "Date" input parameter value. Returns the calculated result value.

 Process: Test Of AddOrSubtractDays Add
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Date	Date and Time	Required	{Modified On(Case)}
Add or Subtract	Two Options	Required	☐ False ☒ True
Years To Add or Subtract	Whole Number	Optional	1
Months To Add or Subtract	Whole Number	Optional	1
Weeks To Add or Subtract	Whole Number	Optional	1
Days To Add or Subtract	Whole Number	Optional	1
Hours To Add or Subtract	Whole Number	Optional	1
Minutes To Add or Subtract	Whole Number	Optional	1
Throw Exception	Two Options	Optional	☐ False ☒ True



Subtract Mode:

It extracts the input parameters of "Year", "Months", "Weeks", "Days", "Hours" and "Minutes" to the "Date" input parameter value. Returns the calculated result value.

Process: Test Of AddOrSubtractDays Subtract

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Date	Date and Time	Required	{Modified On(Case)}
Add or Subtract	Two Options	Required	☒ False ☐ True
Years To Add or Subtract	Whole Number	Optional	1
Months To Add or Subtract	Whole Number	Optional	1
Weeks To Add or Subtract	Whole Number	Optional	1
Days To Add or Subtract	Whole Number	Optional	1
Hours To Add or Subtract	Whole Number	Optional	1
Minutes To Add or Subtract	Whole Number	Optional	1
Throw Exception	Two Options	Optional	☐ False ☒ True

3 Difference Between Days

Input Parameters

Parameter	Type	Default
Start Date	DateTime	
End Date	DateTime	

Output Parameters

Parameter	Type	Default
Result	DateTime	

The method makes calculation to find days' count between two dates using with "Start Date" and "End Date".



Result date returns with "Result" parameter.

Process: Test Of DifferenceBetweenDays

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Start Date	Date and Time	Required	{Birthday(Contact)}
End Date	Date and Time	Required	{Execution Time(Process)}
Throw Exception	Two Options	Optional	☐ False ☒ True

4 Format Date

Input Parameters

Parameter	Type	Default
Date	DateTime	1900-01-01T00:00:00Z
Format String	string	

Output Parameters

Parameter	Type	Default
Result	DateTime	

The method makes calculation to find the formatted date using with "Date" and "Format String".
Result date returns with "Result" parameter.

Process: Test Of FormatDate

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Date	Date and Time	Required	{Birthday(Contact)}
Format String	Single Line of Text	Optional	dd/MM/yyyy
Throw Exception	Two Options	Optional	☐ False ☒ True



5 Now

Output Parameters

Parameter	Type	Default
Result	DateTime	

The method finds current DateTime.

Result date returns with "Result" parameter.

 Process: Test Of Now

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Throw Exception	Two Options	Optional	☐ False ☒ True

6 Parse Date

Input Parameters

Parameter	Type	Default
Date	DateTime	1900-01-01T00:00:00Z

Output Parameters

Parameter	Type	Default
Day Of Week	int	
Day Of Year	int	
Year	int	
Month	int	
Day	int	
Hour	int	



Date String	string
-------------	--------

Time String	string
-------------	--------

The "Date" input parameter is returned by calculating "Day Of Week", "Day Of Year", "Year", "Month", "Day", "Hour", "Minute", "Date String", "Time String"

 Process: Test Of ParseDate
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Date	Date and Time	Required	{Modified On(Case)}
Throw Exception	Two Options	Optional	☐ False ☒ True

7 UTC and Local Time Converter

Input Parameters

Parameter	Type	Default
Time Zone Code (Leave -1 to use User's Time Zone)	int	
UTC DateTime - Input	DateTime	1900-01-01T00:00:00Z
Local DateTime - Input	DateTime	1900-01-01T00:00:00Z
UTC to Local(True) - Local to UTC(False)	bool	False

Output Parameters

Parameter	Type	Default
UTC DateTime - Output	DateTime	1900-01-01T00:00:00Z
Local DateTime - Output	DateTime	1900-01-01T00:00:00Z

The function has two different modes, which vary according to the input parameter "UTC to Local (True)" or "Local to UTC (False)".

Local to UTC (False) Mode:



"UTC DateTime - Output" parameter is used to calculate UTC date value by input parameters of "Local DateTime - Input" and "Time Zone Code".

Process: Test Of UTCandLocalTimeConverter Local to UTC(False)

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Time Zone Code (Leave -1 to use User's...	Whole Number	Optional	134
UTC DateTime - Input	Date and Time	Optional	{Modified On(Case)}
Local DateTime - Input	Date and Time	Optional	{Modified On(Case)}
UTC to Local(True) - Local to UTC(False)	Two Options	Optional	☒ False ☐ True
Throw Exception	Two Options	Optional	☐ False ☒ True

UTC to Local(True) Mod:

The "Local DateTime - Output" parameter is used to calculate the Date value in the LocalTime format with the "UTC DateTime - Input" and "Time Zone Code" input parameters.

Process: Test Of UTCandLocalTimeConverter UTC to Local(True)

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Time Zone Code (Leave -1 to use User's...	Whole Number	Optional	134
UTC DateTime - Input	Date and Time	Optional	{Modified On(Case)}
Local DateTime - Input	Date and Time	Optional	{Modified On(Case)}
UTC to Local(True) - Local to UTC(False)	Two Options	Optional	☐ False ☒ True
Throw Exception	Two Options	Optional	☐ False ☒ True

VIII Numbers Functions

1 Convert Number Value

Input Parameters



Parameter	Type	Default
Value to convert	string	0

Output Parameters

Parameter	Type	Default
Decimal	decimal	
Money	Money	
Float	double	
Rounded Number	int	
Truncated Number	int	
Number as a String	string	

The value contained in the "Value to convert" is converted to other numeric types and returned with the output parameters.

 Process: Test Of ConvertNumberValue
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Value to convert	Single Line of Text	Optional	3,14159
Throw Exception	Two Options	Optional	☐ False ☒ True

2 Calculation

Input Parameters

Parameter	Type	Default
First number	decimal	0
Second number	decimal	0
Symbol	string	+

Output Parameters

Parameter	Type	Default
Result	decimal	



The mathematical operations entered with "First number" and "Second number" values "Symbol" ("+", "-", "/", "*") are applied. Result in the "Result" parameter is returned.

 Process: Test Of Calculation
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
First number	Decimal Number	Optional	16.0000000000
Second number	Decimal Number	Optional	4.0000000000
Symbol	Single Line of Text	Optional	+
Throw Exception	Two Options	Optional	☐ False ☒ True

IX Strings

1 Apply Regex

Input Parameters

Parameter	Type	Default
Text	string	
Regex Pattern	string	

Output Parameters

Parameter	Type	Default
Result	bool	
Matched String	string	

The method makes the calculation to find the matched value using "Text" and "Regex Pattern".

"Result" returns methods status and "Matched String" returns matched value.



Process: Test Of ApplyRegex

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Text	Single Line of Text	Required	{Address 1(Contact)}
Regex Pattern	Single Line of Text	Required	Redmond
Throw Exception	Two Options	Optional	☐ False ☒ True

2 Contains

Input Parameters

Parameter	Type	Default
Full Text	string	
Search Text	string	

Output Parameters

Parameter	Type	Default
Result	bool	

"Search Text" input value searches in "Full Text". If the record is found, the output parameter returns "True".

Process: Test Of Contains

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Full Text	Single Line of Text	Required	{Case Title(Case)}
Search Text	Single Line of Text	Required	Contains
Throw Exception	Two Options	Optional	☐ False ☒ True

3 Encrypt Text



Input Parameters

Parameter	Type	Default
Text to Encrypt	string	

Output Parameters

Parameter	Type	Default
Result	string	

"Text to Encrypt" input value is encrypted in MD5 format. The result is returned with the value "Result".

 Process: Test Of EncryptText
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Text to Encrypt	Single Line of Text	Required	{Subject(Case)}
Throw Exception	Two Options	Optional	☐ False ☒ True

4 Generate Password

Input Parameters

Parameter	Type	Default
Length	int	
Number Of NonAlphanumeric Characters	int	

Output Parameters

Parameter	Type	Default
Result	string	

The "Result" value is generated using the "Length" and "Number Of NonAlphanumeric Characters" input parameters.



The number of characters of the password to be generated is the "Length" value, the number of alphanumeric external characters is determined by the "Number Of NonAlphanumeric Characters" input parameter.

 Process: Test Of GeneratePassword
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Length	Whole Number	Required	10
Number Of NonAlphanumeric Characte...	Whole Number	Required	5
Throw Exception	Two Options	Optional	☐ False ☒ True

5 Replace

Input Parameters

Parameter	Type	Default
Text	string	
Existing Value	string	
New Value	string	
isCaseSensitive	bool	False

Output Parameters

Parameter	Type	Default
Result	string	

"Result" value "Existing Value" string value is found in "Text" input parameter and it is changed with "New Value" value.

If the "isCaseSensitive" parameter is "True", it is expected to match the case when searching.

The output parameter "Result" is returned.



Process: Test Of Replace
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Text	Single Line of Text	Required	{Case Title(Case)}
Existing Value	Single Line of Text	Required	replace
New Value	Single Line of Text	Required	TEST
isCaseSensitive	Two Options	Optional	☐ False ☒ True
Throw Exception	Two Options	Optional	☐ False ☒ True

6 String Length

Input Parameters

Parameter	Type	Default
Text	string	

Output Parameters

Parameter	Type	Default
Result	string	

The entered "Text" parameter finds the number of characters and returns them as "Result" value.

Process: Test Of StringLength
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Text	Single Line of Text	Required	{Case Title(Case)}
Throw Exception	Two Options	Optional	☐ False ☒ True

7 Substring



Input Parameters

Parameter	Type	Default
Text	string	
From Left To Right	bool	
Start Index	int	
Length	int	

Output Parameters

Parameter	Type	Default
Result	string	

If the "From Left To Right" input parameter is True;

The "Text" input parameter value characters are searched from the left to the beginning of the "Start Index", and the characters of "Length" are taken as the "Result" parameter.

If the "From Left To Right" input parameter is False;

"Text" input parameter value characters are started from right to left starting from "Start Index" and characters of "Length" number are obtained and returned as "Result" parameter.

 Process: Test Of Substring
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Text	Single Line of Text	Required	{Case Title(Case)}
From Left To Right	Two Options	Optional	☐ False ☒ True
Start Index	Whole Number	Required	10
Length	Whole Number	Required	5
Throw Exception	Two Options	Optional	☐ False ☒ True

8 Trim



Input Parameters

Parameter	Type	Default
Text	string	

Output Parameters

Parameter	Type	Default
Result	string	

The space character at the end of the "Text" parameter is deleted and it is returned with the value "Result".

 Process: Test Of Trim
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Text	Single Line of Text	Required	The text end with 5 space
Throw Exception	Two Options	Optional	☐ False ☒ True

9 Upper and Lower Case

Input Parameters

Parameter	Type	Default
Text	string	
Capitalize All Words	bool	False
First Letter Only	bool	False
Lower Case All	bool	False
Upper Case All	bool	False

Output Parameters

Parameter	Type	Default
Result	string	

"Capitalize All Words" is True;



The "text" input parameter value is provided with the "Result" value so that all the words in the first characters will be upper case.

"First Letter Only";

The "Text" input parameter value is returned with the value "Result" as the first character is capitalized.

"Lower Case All";

The "Text" input parameter value is provided with the value "Result" so that all characters are in lower case.

"Upper Case All";

The value of the "Text" input parameter is returned with the value "Result" as all characters are capitalized.

 Process: Test Of UpperAndLowerCase
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Text	Single Line of Text	Required	{Case Title(Case)}
Capitalize All Words	Two Options	Optional	☐ False ☒ True
First Letter Only	Two Options	Optional	☒ False ☐ True
Lower Case All	Two Options	Optional	☒ False ☐ True
Upper Case All	Two Options	Optional	☒ False ☐ True
Throw Exception	Two Options	Optional	☐ False ☒ True

10 URL Encode Decode

Input Parameters

Parameter	Type	Default
Is Encode?	bool	True
Text	string	

Output Parameters

Parameter	Type	Default
-----------	------	---------



Result **string**

"Is Encode?" If the value is True;

The value of the "Text" parameter is passed through the URLEncode operation, and the result is returned with the "Result" parameter.

"Is Encode?" If the value is False;

The value of the "Text" parameter is passed through URLDecode and the URL is returned to the normal format with the value "Result" parameter frozen again.

 Process: Test Of URLEncodeDecode
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Is Encode?	Two Options	Optional	☐ False ☒ True
Text	Single Line of Text	Required	https://mywebsite/docs/english/site/my!
Throw Exception	Two Options	Optional	☐ False ☒ True

11 Word Count

Input Parameters

Parameter	Type	Default
Text	string	

Output Parameters

Parameter	Type	Default
Result	string	

The method makes the calculation to find the count of to word using "Text".

"Result" returns count value.



 Process: Test Of WordCount

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Text	Single Line of Text	Required	{Address 1(Contact)}
Throw Exception	Two Options	Optional	☐ False ☒ True

X Tools

1 Associate or Disassociate

Input Parameters

Parameter	Type	Default
Relationship Name	String	
Record URL	String	
Associate(true) or Disassociate(false)	bool	False

Output Parameters

Parameter	Type	Default
Result	bool	

If the " Associate(true) or Disassociate(false)" input parameter is True;

The " Record URL" input parameter value will associate of the " Relationship Name" entity record reference. Associate result is taken as the "Result" parameter.

If the " Associate(true) or Disassociate(false)" input parameter is False;

The " Record URL" input parameter value will associate of the " Relationship Name" entity record reference. Associate result is taken as the "Result" parameter.



 Process: Test Of AssociateOrDisassociate Mode Associate(true)
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Relationship Name	Single Line of Text	Required	contact_as_primary_contact
Record URL	Single Line of Text	Required	{Record URL(Dynamic)(Create (Case))}
Associate(true) or Disassociate(false)	Two Options	Required	☐ False ☒ True
Throw Exception	Two Options	Optional	☐ False ☒ True

2 Execute Process

Input Parameters

Parameter	Type	Default
Record URL	string	
Process	EntityReference - ReferenceTarget("workflow")	

Output Parameters

Parameter	Type	Default
Result	bool	

The "Record URL" input parameter is the corresponding entity registration link. In the "Process" input parameter there is the desired workflow to run in the corresponding register. The workflow result is returned as "Result".



Process: Test Of ExecuteProcess

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Record URL	Single Line of Text	Required	{Record URL(Dynamic)(Case)}
Process	Lookup	Required	Test Of UpperAndLowerCase
Throw Exception	Two Options	Optional	☐ False ☒ True

3 Execute Process with Query

Input Parameters

Parameter	Type	Default
goalrollupquery	EntityReference	
Process	EntityReference	

Output Parameters

Parameter	Type	Default
Result	bool	

"goalrollupquery" input parameter contains the Rollup Query reference. The "Process" input parameter is the link to the process which we want to run.

A query can be like that:



General

Name* Test Query Entity Type* Case
Owner* Cumhur Cokun

Query

Clear | Group AND | Group OR

Case	Equals	Operating manual required...
Case Type	Equals	Problem
Service Level	Equals	Gold

Fields

- Activities Complete
- Actual Service Units
- Billed Service Units
- Blocked Profile
- Case
- Case Number
- Case Stage
- Case Title
- Case Type
- Check Email
- Child Cases
- Contact
- Contract
- Contract Line
- Created By
- Created By (Delegate)
- Created By (External Party)
- Created On
- Currency

View Records

Information on whether or not it is successful is returned with the value "Result".

Process: Test Of Execute Process Query

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Query to be applied	Lookup	Required	Test Rollup Query
Process	Lookup	Required	Test Of Replace
Throw Exception	Two Options	Optional	☐ False ☒ True

4 ExecuteRollupFieldCalculation



Input Parameters

Parameter	Type	Default
FieldName	string	
Record URL	string	

Output Parameters

Parameter	Type	Default
Result	bool	

"FieldName" input parameter contains the information of rollup field name. The "Record URL" input parameter is the link to the relevant entity record. Rollup field value is recalculated for the moment. Information on whether or not it is successful is returned with the value "Result".

 Process: Test Of ExecuteRollupFieldCalculation
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
FieldName	Single Line of Text	Required	mwns_subcasecount
Record URL	Single Line of Text	Required	{Record URL(Dynamic)(Case)}
Throw Exception	Two Options	Optional	☐ False ☒ True

5 RetrieveGuid

Input Parameters

Parameter	Type	Default
RecordURL	string	

Output Parameters

Parameter	Type	Default
RecordId	string	

The "Record URL" input parameter is the link to the relevant entity record. The record of the entity is returned with the record ID value "RecordId".



 Process: Test Of RetrieveGuid
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
RecordURL	Single Line of Text	Optional	<code>{Record URL(Dynamic)(Case)}</code>
Throw Exception	Two Options	Optional	☐ False ☒ True

XI Users

1 Check User in Role

Input Parameters

Parameter	Type	Default
Role	EntityReference - ReferenceTarget("role")	
User	EntityReference - ReferenceTarget("systemuser")	
Use Initiating User	bool	

Output Parameters

Parameter	Type	Default
isUserInRole	bool	

The security role entered in the "Role" input parameter is provided with the value "isUserInRole" to indicate whether it is defined in the user entered in the "User" input parameter.

If the "Use Initiating User" parameter is set to True, the relevant security role is searched for the CRM user who is currently performing the operation.



Process: Testing CheckUserInRole Method
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Role	Lookup	Required	System Customizer
User	Lookup	Optional	
Use Initiating User	Two Options	Required	☐ False ☒ True
Throw Exception	Two Options	Optional	☐ False ☒ True

2 Check User in Team

Input Parameters

Parameter	Type	Default
Team	EntityReference - ReferenceTarget("role")	
User	EntityReference - ReferenceTarget("systemuser")	
Use Initiating User	bool	

Output Parameters

Parameter	Type	Default
isUserInRole	bool	

The team information entered in the "Team" input parameter is provided with the value "isUserInTeam" to indicate whether it is defined in the user entered in the "User" input parameter.

If the "Use Initiating User" parameter is set to True, the relevant team is searched for the CRM user who is currently performing the operation.



Process: Test Of CheckUserInTeam

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Team	Lookup	Required	Test team
User	Lookup	Optional	{Owner(Contact)}
Use Initiating User	Two Options	Required	☒ False ☐ True
Throw Exception	Two Options	Optional	☐ False ☒ True

3 Get User Roles

Input Parameters

Parameter	Type	Default
User Fullname	string	
User	EntityReference - ReferenceTarget("systemuser")	

Output Parameters

Parameter	Type	Default
Role List	string	

The security role list assigned by using the user name surname information entered in the "User Fullname" input parameter or the user information selected in the "User" input parameter is returned with the "Role List" value.

If "User Fullname" is entered, this parameter is used first. If it is left empty, "User" parameter is searched.



Process: Test Of GetUserRoles
Set Custom Step Input Properties

Property Name	Data Type	Required	Value
User Fullname	Single Line of Text	Optional	Cumhur Coskun
User	Lookup	Optional	
Throw Exception	Two Options	Optional	☐ False ☒ True

4 Retrieve Initiating User

Output Parameters

Parameter	Type	Default
Initiating User	EntityReference - ReferenceTarget("systemuser")	

The information of the currently active user is returned with the "Initiating User" output value.

XII Uninstall Mawens Workflow Helper Tool

To uninstall, first delete any workflows which include Mawens Workflow Helper Tool you have created. Then uninstall as usual, by deleting the solution under solutions list.

Thank you for your interest in Mawens Workflow Helper Tool.

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