

How to use the Nintex Workflow CRM actions.

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Introduction

This tutorial will describe how to use the associated CRM actions in Nintex Workflow. These actions include 'Create CRM record', 'Delete/Disable CRM record', 'Query CRM' and 'Update CRM record'. It will also explain how CRM records are referenced and how to retrieve the GUID values that make each entry unique. The GUID values are used to update CRM records and create new records. The GUID value for a CRM entry is similar to a list item ID value in SharePoint.

Query CRM

Create a workflow as normal and then drag on a Query CRM action. This action can be used to query any existing value in CRM. It can be used to return multiple values in a single query storing the results to separate workflow variables.

In this case we will query for the User GUID based on the user's 'DOMAIN\samaccountname'. This is required for creating many other CRM entries, the user ID must be in the format of a GUID.

The first step when configuring any CRM action is to enter the CRM system details and then click **Load CRM Details**.

Configure Action - Query CRM

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Server URL *

Organization name *

Credentials *

Username

Password

Load CRM Details

This will load the system into the action configuration.

Each CRM entity has a GUID assigned to it and this is how other actions, such as the update CRM action know which record to update.

In the below action configuration the query will return the user GUID for a user record that has a Domain Logon Name with the value "NintexTest\administrator".

'user GUID' is a workflow text variable.

Configure Action - Query CRM

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Server URL *

Organization name *

Credentials *

Username

Password

Attributes to return

Entity *

Return as XML Variables

Attribute name	Store result in
<input type="text" value="User"/>	<input type="text" value="user GUID"/>

[+ Add attribute](#)

Filters

Where the attribute

Create CRM record

The next step would be to use this GUID to create a new record.

Configure a new “Create CRM record” action and enter the CRM details, then click on **Load CRM Details** (the same as with all CRM actions) to retrieve your CRM configuration information. Once the CRM details are available to select you can configure the action to create a new record.

In this example a new lead will be created.

Configure Action - Create CRM record

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Server URL *

Organization name *

Credentials *
 Username
 Password

Entity *

Store record ID in *

Attributes

Company Name *

Last Name *

Owner *

Topic *

First Name +

The ‘Owner’ value, must reference the user GUID queried in the previous action. Basically, to retrieve this value you will first always need to use a Query CRM action in conjunction with any of the other CRM update or deletion actions. The only exception to this is if you can somehow reference the GUID value directly.

Each of the required fields will be marked with a red asterisk *. These are the minimum attributes that must be configured.

Update CRM record

Following the previous action examples the newly created lead can then also be updated.

Add an Update CRM record action and enter the CRM details the same as the other CRM actions.

To determine which lead to update, the previously saved “lead GUID” variable can be used. Each entity must be referenced by its GUID.

Configure Action - Update CRM record

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Server URL *

Organization name *

Credentials *
 Username
 Password

Entity *

Record to update *

Attributes

Business Phone

Address 2: Street 1

This will update the newly created lead and populate the Business Phone and Address, additional attributes can be added.

Delete/Disable CRM record

If for example the goal was to delete or update a CRM case record, the first step would be to query for the case GUID based on certain case information. In this example we can query based on the case name.

Configure Action - Query CRM

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Server URL *

Organization name *

Credentials *

Username

Password

Attributes to return

Entity *

Return as XML Variables

Attribute name	Store result in
<input type="text" value="Case"/>	<input type="text" value="case GUID"/>

[+ Add attribute](#)

Filters

Where the attribute

[+ Add filter](#)

This will store the case GUID to a workflow text variable for a case with a title of 'testcase001'.

Essentially the GUID attribute for each entity is the same as the entity name, e.g. entity name is Case, the attribute to retrieve for the GUID is also named Case.

Based on the “case GUID” text variable a “Delete CRM record” action can be configured to delete the case.

Configure Action - Delete/Disable CRM record

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Server URL *	<input type="text" value="http://10.10.3.152/"/>
Organization name *	<input type="text" value="nintextest"/>
Credentials *	Username <input type="text" value="nintextest\administrator"/>
	Password <input type="password" value="....."/>
	<input type="button" value="Load CRM Details"/>
Action	<input checked="" type="radio"/> Delete <input type="radio"/> Disable
Entity *	<input type="text" value="Case"/>
Record to delete *	<input type="text" value="case GUID"/>

Creating a new CRM case

To create a new CRM case, four minimum attributes are required.

Customer – GUID of the customer CRM entry that will be associated to the case. A customer can be either a CRM account or a contact entity

Owner – GUID of the user CRM entry that will be associated to the case, the owner will be a user CRM entity

Subject – GUID of the subject value. The subjects are predefined values configured different for each CRM environment

Title – text title of the new CRM case

The first step in create a new record would be to query CRM for the customer and owner GUID values that will be required.

Customer CRM Query

Configure a new CRM query action and load the CRM details. In this example we will be querying for an account GUID based on the account number. This value will then be used for the customer attribute.

Configure Action - Query CRM

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Server URL *

Organization name *

Credentials *
 Username
 Password

Attributes to return

Entity *

Return as XML Variables

Attribute name	Store result in
<input type="text" value="Account"/>	<input type="text" value="account GUID"/>

[+ Add attribute](#)

Filters

Where the attribute

[+ Add filter](#)

The account GUID will be stored to a workflow text variable named "account GUID".

Owner CRM Query

The next step will be to add another Query CRM action and query for a user entity and retrieve the user GUID. The user to return will be determined on the Primary E-mail attribute.

Configure Action - Query CRM

General

Save
 Cancel
 Action
 Labels
 Common
 Variables
 Help

Commit
Settings
Variables
Help

Server URL *

Organization name *

Credentials *
 Username
 Password

Attributes to return

Entity *

Return as XML Variables

Attribute name	Store result in
<input type="text" value="User"/>	<input type="text" value="user GUID"/>

[+ Add attribute](#)

Filters

Where the attribute

[+ Add filter](#)

The variable "user GUID" contains the user GUID and will then be used to update the Owner attribute when creating a new case.

Query CRM Case Subject

Each CRM configuration will have specific subjects created. The subject GUID will be required when creating a case. The easiest way to find this value would be to create a test case in CRM manually with the required subject already configured using the CRM UI. Then query the GUID values for this subject and store the result. When creating additional cases you can simply reference the subject GUIDs directly rather than querying for the values each time a new case needs to be created.

Example subject query configuration.

Configure Action - Query CRM

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Server URL *

Organization name *

Credentials *
 Username 🔒
 Password
Load CRM Details

Attributes to return

Entity *

Return as XML Variables

Attribute name	Store result in
<input type="text" value="Subject"/>	<input type="text" value="subject variable"/>

[+ Add attribute](#)

Filters

Where the attribute

<input type="text" value="Title"/>	<input type="text" value="Equal"/>	<input type="text" value="Title1"/>
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[+ Add filter](#)

This will return the GUID for the subject configured in the CRM case. In this example the subject was "Default subject".

Case: CAS-01002-4W3V0G

Information

General | Notes and Article

Overview

Title *

Customer *

Subject *

Case Type

Case Origin

Satisfaction

Logging the variable "subject variable" to the history list directly after the query will display the value in the workflow status.

Configure Action - Log in history list

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Insert Reference

subject = {WorkflowVariable:subject variable}

Example value:

Event	Message
Workflow Comment	subject = b0d9f0c2-6b84-4401-bf94-c68e55155c02

When setting this subject in the future you can reference the value **b0d9f0c2-6b84-4401-bf94-c68e55155c02** instead of querying for the value each time.

Create CRM record (case)

The final action will use the results of the 2 previous CRM queries and create a new CRM case. Configure a new create CRM record action and load the CRM details. Then select Case as the entity and configure the values as follows.

Configure Action - Create CRM record

General


Save


Cancel


Action


Labels


Common


Variables


Help

Commit

Settings

Variables

Help

Server URL *	<input type="text" value="http://10.10.3.152/"/>
Organization name *	<input type="text" value="nintextest"/>
Credentials *	Username <input type="text" value="nintextest\administrator"/>  Password <input type="password" value="....."/> <input type="button" value="Load CRM Details"/>
Entity *	<input type="text" value="Case"/>
Store record ID in *	<input type="text" value="new case GUID"/>
Attributes	<input type="text" value="Please select an attribute..."/>
Customer *	<input type="text" value="account GUID"/>
Owner *	<input type="text" value="user GUID"/>
Subject *	<input type="text" value="subject variable"/>
Title *	<input type="text" value="test title"/>

Additional attributes can be configured but in this example only the minimum required values were used.

The final workflow will look similar to the following.

