

Automation

Automation

[Go to list of Automations and how to use them](#)

How to set up Automation

Step 1:

Click on “Forms” and the form you would like to add automation to. Then, the “Automation” button would be enabled on top.

JET Workflow

All Apps
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Manage Forms

[Active Forms](#) Deleted Forms

[+ Add Form](#)

[Fields Mapping](#) **[Automation](#)** [Share Form](#) [Custom UI](#) [Setti](#)

| Select | Form Order | Icon | Form Name | Form Type | Acce |
|-------------------------------------|------------|------|-------------------------|-----------|-----------|
| <input checked="" type="checkbox"/> | 1 | | newForm | form | public_ac |
| <input type="checkbox"/> | 2 | | Customer | filter | public_ac |
| <input type="checkbox"/> | 3 | | Chat Room Demonstration | form | public_ac |

Step 2:

Click on "Add Automation".

JET Workflow Search records

← **newForm - Automation**

[+ Add Automation](#) [Copy Automation](#) [Delete](#)

| Select | Edit | Order | ID | History | Automation |
|--------|------|-------|----|---------|------------|
|--------|------|-------|----|---------|------------|

Step 3:

Fill in the Automation Name with a meaningful name for the automation.

Automation Settings

| Forms | Fields |
|------------------------------|--|
| newForm - 421 (Current Form) | Name (Name) Mobile Number (mobile) Email Address (email) Remarks (remarks) Profile Picture (profile) |

Basic Information

Automation name *:

Keep Automation History:

Build Automation

WHEN *:

Conditions

Write all the conditions here

THEN, I would like to

Select Action 1

Step 4:

Click on Event Type and there would be a list of events to pick from.

Automation Settings

| Forms | Fields |
|--|--|
| <ul style="list-style-type: none">newForm - 421 (Current Form)7-Network Contact List - 394Catalogue - 417Chat Room Demonstration - 419Checklist for Customer - 297Completed (Training Schedule) - 219Completed (User Account Management) - 235 | <ul style="list-style-type: none">Name {Name}Mobile Number {mobile}Email Address {email}Remarks {remarks}Profile Picture {profile} |

Basic Information

Automation name *:

Keep Automation History:

Build Automation

WHEN *:

- Select
- A Record is Added
- A Record is Updated
- A Record is Deleted
- A Record is Added/Updated
- A New Entry is Added in Discussion Room
- A New Entry is Added in Resource Room
- There is any changes on Add/Update/Rooms

Conditions (IF): *

THEN, I would like to

Step 5:

| | |
|---|--|
| A Record is Added | Automation will check upon the action of Add Record |
| A Record is Updated | Automation will check upon the action of Update Record |
| A Record is Deleted | Automation will check upon the action of Delete Record |
| A Record is Added/Updated | Automation will check upon the action of Add or Update Record |
| A New Entry is Added in Discussion Room | Automation will check upon the action of new chat entry to Discussion Room |
| A New Entry is Added in Resource Room | Automation will check upon the action of new file upload entry to Resource Room |
| There <u>is</u> any changes on Add/Update/Rooms | Automation will check upon the action of new file upload entry to Resource Room or Add Record or Update Record |

Under the Conditions section, we define when the trigger will meet the condition to activate.

Examples of Conditions:

Value of field 1 is more than 1

Value of field 2 is less than field 3

Value of field 2 is not equal to field 3

Value of field 11 is more than the addition of field 12 and field 13

Text Value of stringField 1 is equal to 'stringExample'

Numeric field is equal to 14

Checkbox 1 is checked and Checkbox 2 is unchecked

Date and Time field is more than 22/09/2013

Date and Time field 1 is more than Date and Time field 2

Date and Time field is less than '23/10/2018 15:12 PM'

Step 6:

Now you can define what actions the trigger will use after the conditions are fulfilled. Please note that you can fill in up to 10 actions for a single trigger.

| | |
|--------------------------------------|---|
| Send Email | Send an email to target recipient complete with subject |
| Send Notification | Send a notification through JET Workflow app |
| Activate a popup dialog | Raises a popup with a customized message. |
| Auto Create New Record | Creation of new Record in another form |
| Auto Update existing record | Update existing Record in another form |
| Auto Delete existing record | Delete existing Record in another form |
| Copy Record to another form | Copy a record to another form |
| Move Record to another form | Move a record to another form |
| Delete Current Record | Delete only the current record that the automation is activated for |
| Copy All Records to another form | Copy all records to another form |
| Move All Records to another form | Move all records to another form |
| Auto Delete All Records in this form | Delete all records in this form |
| Set Current Event Value | Define the current value of the fields in this form |
| Send GET Request | Sends field data via API using GET method |
| Send POST Request | Sends field data via API using POST method |
| Run SQL command in MySQL database | Run SQL command in MySQL database |
| Run SQL command in MSSQL database | Run SQL command in MSSQL database |
| Run SQL command in Oracle database | Run SQL command in Oracle database |
| Run HTML file or string | Run HTML code |
| Run Javascript code | Run Javascript code |
| Run CSS code | Run CSS code |

Step 7:

You can set a time for the action schedule. Please take note that this is only valid for Send Email, Send Notifications and Send SMS actions.

Automation Settings

Conditions (IF):*

THEN, I would like to

Set Conditions ⓘ

Conditions
Write all the conditions here

Select Action 1
Select

Action 1 Builder

Set Schedule 1
2023/03/16 10:31

+ Add More Action

Close Save

How to use Automation:



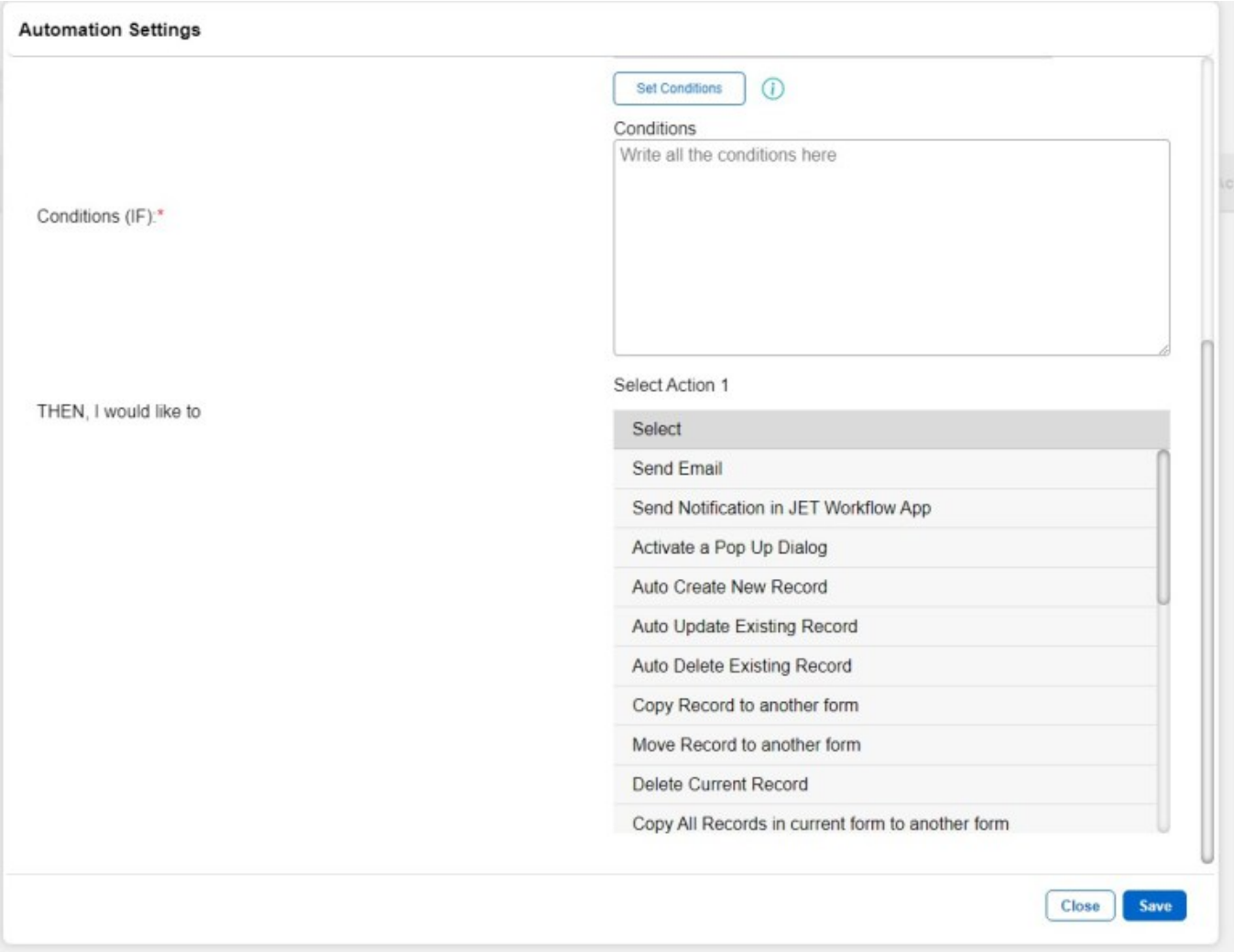
Send Email

Send an email to target recipient complete with subject.

Step 1: Skip this step if you have already configured your **SMTP** settings. **An SMTP Server is required.**

If you do not have an SMTP relay/server, please check out this article: How to Setup SMTP settings(<https://jetworkflow.com/documentation/how-to-setup-smtp-settings/>) , on how to configure your SMTP settings before moving on.

Step 2: Select “Send email” as Action Type as shown below.



Step 3: Fill in the pop up box that appears with all the necessary fields, and press the “Save” button.

Send Email

Email Information

Sender Name:

Recipient Email Address:

Email subject:

Email Content

Font | Formatting | Font size | **B** | *I* | U | A | [List icons]

[Rich text editor icons]

This is a test email

Fields
(Double Click the field name to auto-insert field to Action Content)

Name {Name}
Mobile Number {mobile}
Email Address {email}
Remarks {remarks}
Profile Picture {profile}

Schedule Email

Set Schedule:

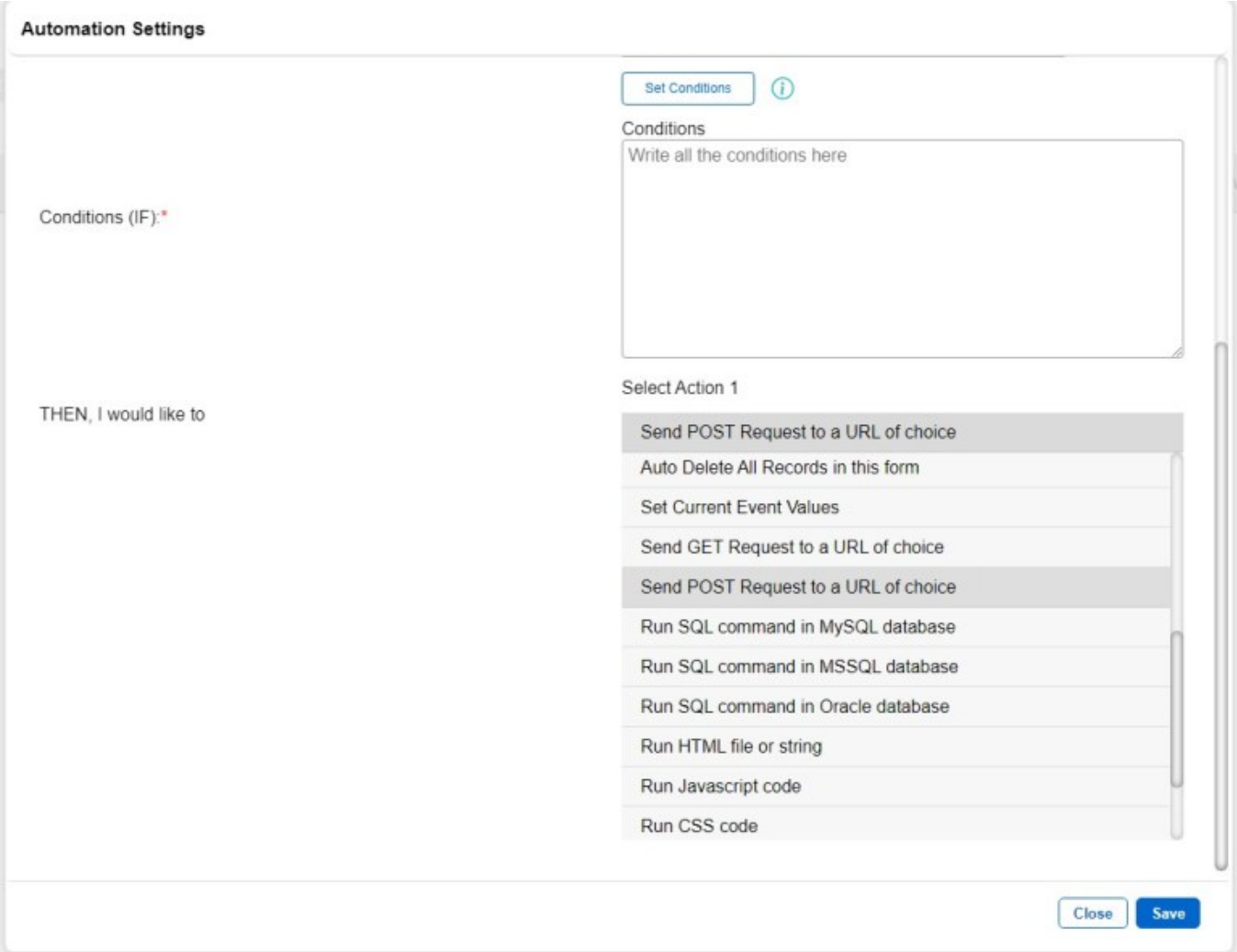
Result: After this action is activated, an email will be sent to the recipient email.

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Http request

Sends a GET request to a URL of choice.

Step 1: Select “Send GET Request” or “Send POST Request” as Action Type as shown below.



Step 2: Fill in the pop up box that appears with a valid URL in the field, and press the “Save” button.

The fields should be in the format of:

```
http://URL/path/?fieldA={field1}&fieldB={field5}
```

, where the data sent is in the format of:

```
{  
  "fieldA": {field1},  
  "fieldB": {field5}  
}
```

Send POST Request to a URL of choice

| | |
|---|---|
| Action http://URL/path/?fieldA={field1}&fieldB={field5} | Fields (Double Click the field name to auto-insert field to Action Content) |
| <pre>http://test.com/?name={Name}&number={mobile}</pre> | <pre>Name {Name_label} Mobile Number {mobile} Email Address {email} Remarks {remarks} Profile Picture {profile}</pre> |

Result: After this action is activated, a GET or POST request will be sent to the URL with the data supplied.

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Send Notification

Send a notification through JET Workflow app

Step 1: Select “Send Notification” as Action Type as shown below.

Automation Settings

Set Conditions ⓘ

Conditions (IF)*

Conditions

Write all the conditions here

THEN, I would like to

Select Action 1

- Send Notification in JET Workflow App
- Send Email
- Send Notification in JET Workflow App
- Activate a Pop Up Dialog
- Auto Create New Record
- Auto Update Existing Record
- Auto Delete Existing Record
- Copy Record to another form
- Move Record to another form
- Delete Current Record
- Copy All Records in current form to another form

Close Save

Step 2: Fill in the pop up box that appears with all the field with a notification text in the field, and press the “Save” button.

The format of the field should be as follows:

[Email]###[Message Content]

Send Notification in JET Workflow App

Action
name1@domain.com###notification text

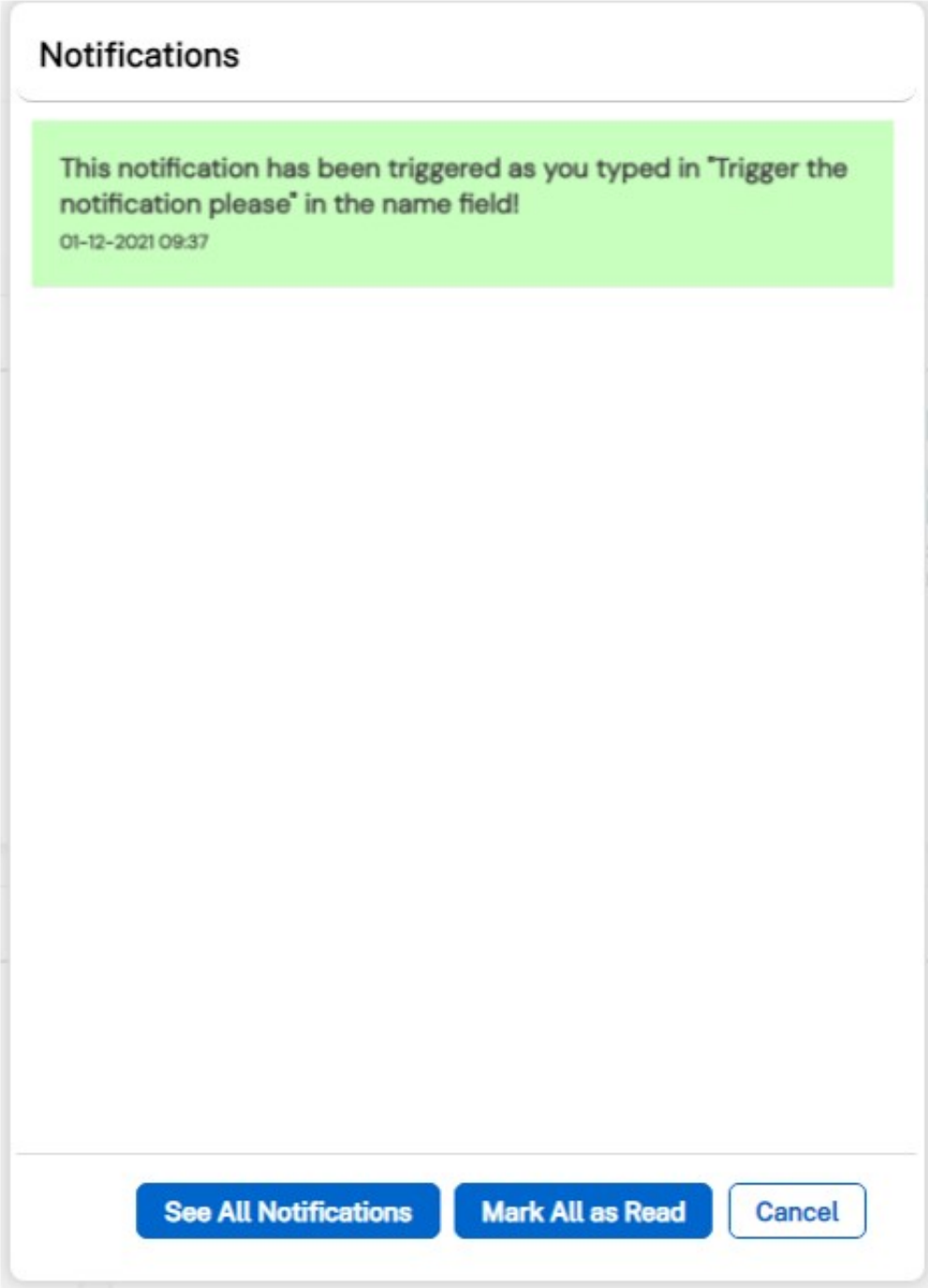
Fields
(Double Click the field name to auto-insert field to Action Content)

test@test.com###This is a test notification for {email}

Name {Name_label}
Mobile Number {mobile}
Email Address {email}
Remarks {remarks}
Profile Picture {profile}

[Close](#) [Save](#)

Result: After this action is activated, you will receive a notification in the JET app.

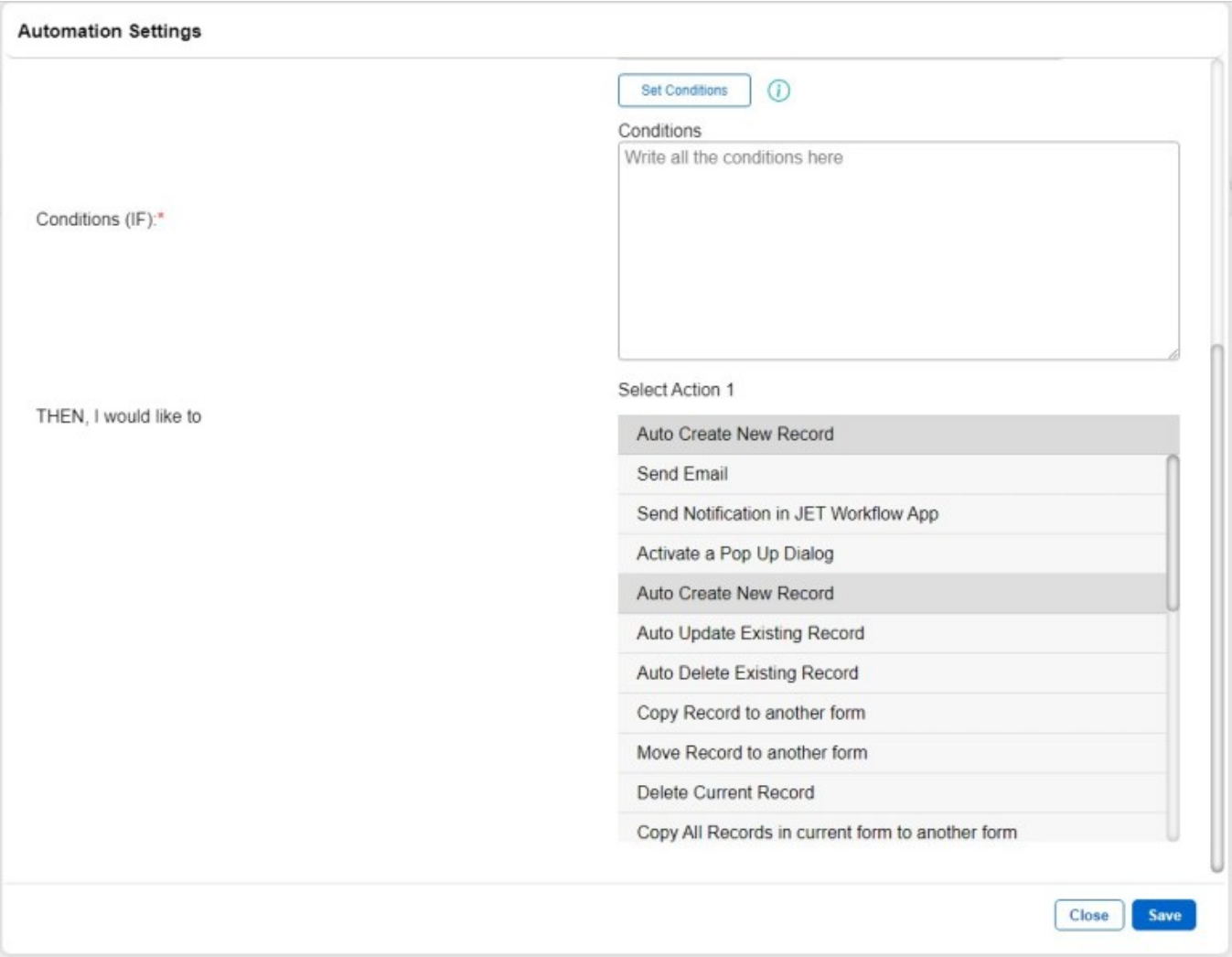


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Auto Create New Record

Creation of new record

Step 1: Select “Auto Create new record” as Action Type as shown below.



Step 2: Fill in the “Action” field, and press the “Save” button.

The format of the field should be as follows:

```
formID=[Form ID of choice] SET [Field Name 1]=[Value];[Field Name 2]=[Value] ...
```

Auto Create New Record

| | |
|---|--|
| Forms <ul style="list-style-type: none">newForm - 421 (Current Form)7-Network Contact List - 394Catalogue - 417Chat Room Demonstration - 419Checklist for Customer - 297Completed (Training Schedule) - 219Completed (User Account Management) - 235 | Fields <ul style="list-style-type: none">Name {Name}Mobile Number {mobile}Email Address {email}Remarks {remarks}Profile Picture {profile} |
| Action <pre>formID=[Form ID of choice] SET [Field Name 1]=[Value],[Field Name 2]=[Value]</pre> <pre>formID=2 SET Username={name};Password="abc123";Email="test@test.com"</pre> | |
| <input type="button" value="Close"/> <input type="button" value="Save"/> | |

Result: After this action is activated, a record will be added to the form of choice, defined by the formID.

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Find: How to find Form IDs

Step 1: On the Automations page, click on the “Add Automation” button on the top right corner.



Step 2: The Form IDs of your forms will be displayed on the top left side of the popup.

Automation Settings

| Forms | Fields |
|--|--|
| dsasdads - 289 f96g32whux_test sheet - 253 f96g32whux_test sheet - 254 f96g32whux_test sheet - 255 f96g32whux_test sheet - 256 first form - 257 leave logs - 393 | Name {Name} Mobile Number {mobile} Email Address {email} Remarks {remarks} Profile Picture {profile} |

Basic Information

Automation name *:

Keep Automation History:

Build Automation

Result: From the above example, we can see that the IDs of the forms are labelled beside the assigned form in the format:

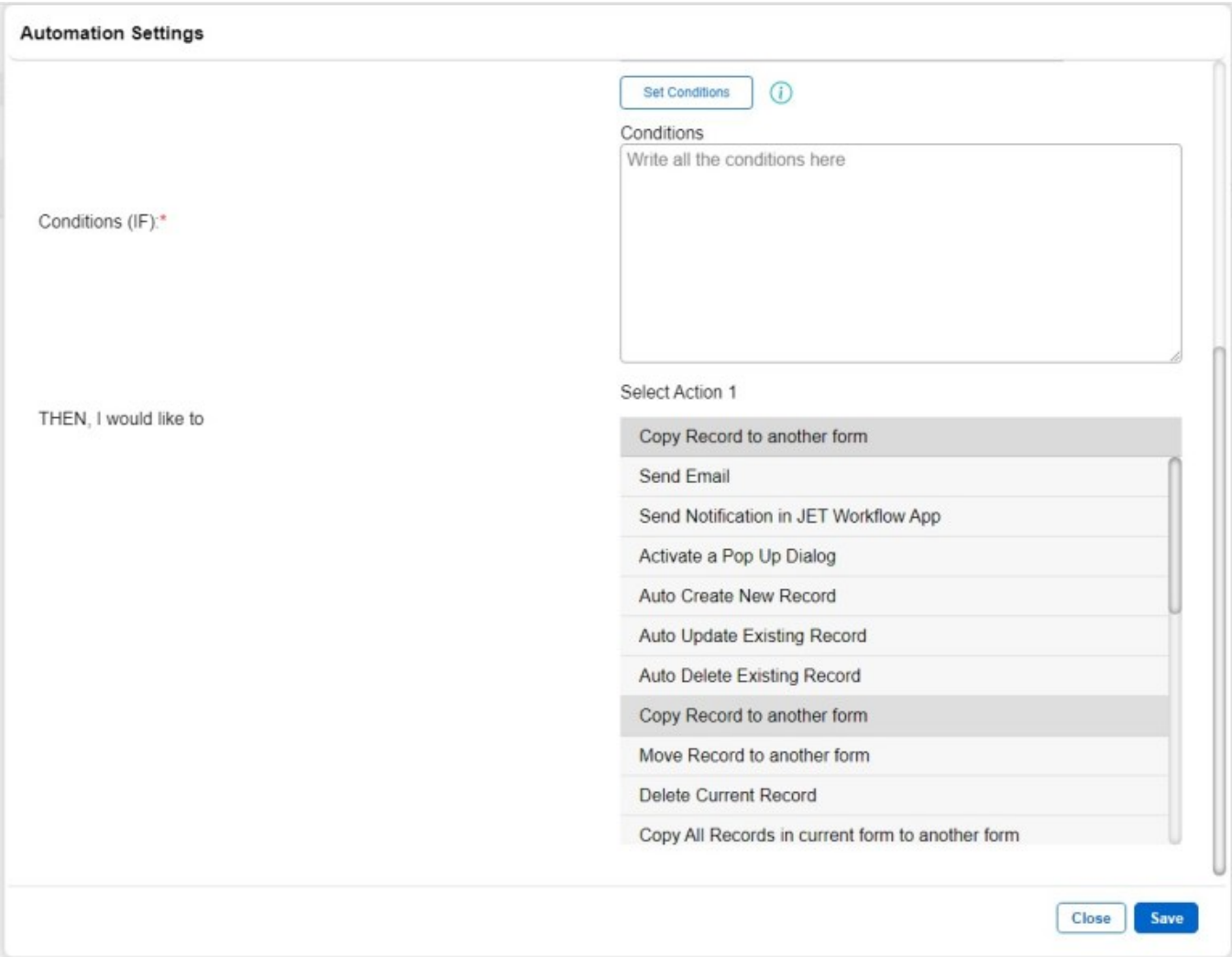
[Form Name] - [Form ID]

Note: Currently there is no other way to access form IDs.

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Copy record to form

Step 1: Select “Copy record to form” as Action Type as shown below.



Step 2: Select the form that you would like to copy to in the popup that appears. Alternatively, type:

```
formID=[formID of form of choice]
```

into the Action field.

Copy Record to another form

List of Available Forms
Select a form

- newForm - 421 (Current Form)
- 7-Network Contact List - 394
- Catalogue - 417
- Chat Room Demonstration - 419
- Checklist for Customer - 297
- Completed (Training Schedule) - 219
- Completed (User Account Management) - 235
- Customer Info - 246
- Customer - 420
- CyberSecurity Advisory and Government Bulletin 2 - 284
- CyberSecurity Advisory and Government Bulletin 3 - 285
- CyberSecurity Advisory and Government Bulletin 4 - 286
- CyberSecurity Advisory and Government Bulletin 5 - 287
- CyberSecurity Advisory and Government Bulletin 6 - 288

Step 3: Your Action should now look something like this. Click the “Save” button.

Automation Settings

Conditions (IF):*

THEN, I would like to

Set Conditions ⓘ

Conditions

Write all the conditions here

Select Action 1

Copy Record to another form

Action 1 Builder

formID=417

Set Schedule 1

+ Add More Action

Close Save

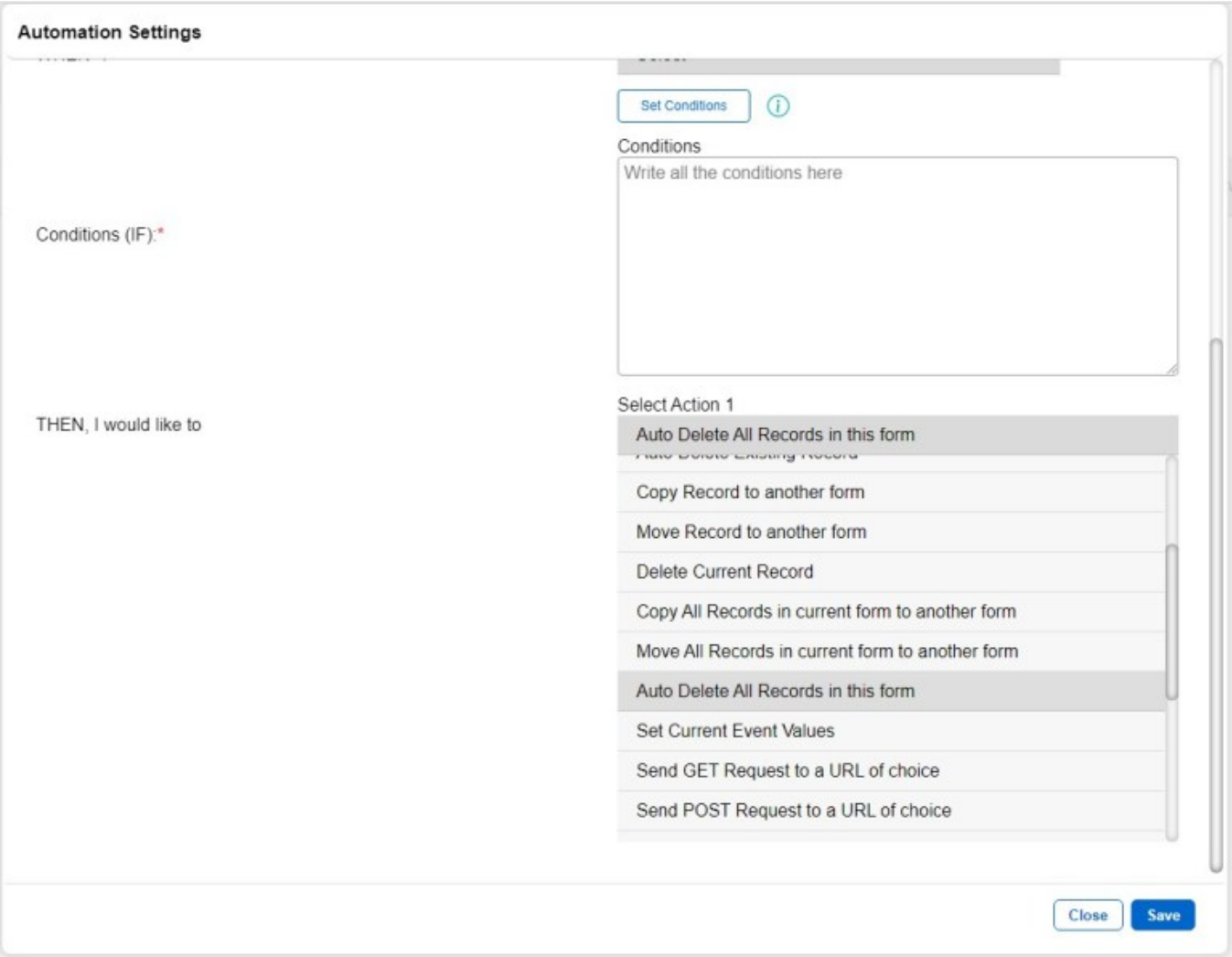
Note: The fields in the form that activates this action should have the **same field names** as the fields in the target form. The fields of the original form that do not match the fields of the target form will be left blank in the copied record.

Result: After this action is activated, a record will be copied to the form of choice, defined by the formID.

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Auto Delete all Records

Step 1: Select “Auto Delete All Records” as Action Type as shown below.



Step 2: Select the form that you would like to delete all records from in the popup that appears. Alternatively, type:

```
formID=[formID of form of choice]
```

into the Action field.

Auto Delete All Records in this form

List of Available Forms
Select a form

- newForm - 421 (Current Form)
- 7-Network Contact List - 394
- Catalogue - 417
- Chat Room Demonstration - 419
- Checklist for Customer - 297
- Completed (Training Schedule) - 219
- Completed (User Account Management) - 235
- Customer Info - 246
- Customer - 420
- CyberSecurity Advisory and Government Bulletin 2 - 284
- CyberSecurity Advisory and Government Bulletin 3 - 285
- CyberSecurity Advisory and Government Bulletin 4 - 286
- CyberSecurity Advisory and Government Bulletin 5 - 287

Step 3: Your Action should now look something like this. Click the “Save” button.

Automation Settings

Conditions (IF):*

THEN, I would like to

Set Conditions ⓘ

Conditions

Write all the conditions here

Select Action 1

Auto Delete All Records in this form

Action 1 Builder

formID=417

Set Schedule 1

+ Add More Action

Close Save

Result: After the action is activated, the form has no more records left.

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