

Nintex Workflow Documentation

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Document Generation Don't let the manual creation of critical documents like contracts, work orders, and invoices slow down your business. Equip teams with Nintex DocGen® to instantly build and share documents with just a few clicks from directly within Salesforce or Office 365. No more cutting and pasting, no more errors.

Document Generation Solutions - Nintex DocGen®
Nintex is a 'drag-and-drop' workflow platformthat makes creating automated workflows much easier. And workflow templates make building workflows even more simple—just drag and drop your specifics into a pre-structured workflow. Nintex provides workflow templates for the approval process and many more in the Nintex Training Space.

3 Stages of the Document Approval Process - Nintex
Companies like Meritage Homes use Nintex Document Generation and workflow automation in Salesforce to streamline their contract creation processes. Their agents are able to populate document fields automatically, saving hours with each contract. Workflow automation makes everyday tasks easier by reducing errors and saving time and money.

What Is Workflow? - Nintex
PLEASE NOTE: The Word document must be in the docx format (either Word 2007, Word 2010 or Word 2013). Files in the format “.doc” cannot save content controls - it converts them to static content. To use the workflow action:

Update document - Nintex
Automate your simple to sophisticated business processes from within the familiarity of your SharePoint environment. Nintex for SharePoint delivers powerful workflow automation, digital forms, mobile apps, and more — to enhance your SharePoint experience and streamline your business processes.

SharePoint Workflow and Intelligent Process Automation ...
Use Nintex Document Tagger to add tags Strings of text that let you specify where in a generated document a variable value should be placed. When a document is generated, the tags are replaced with the value of the variable. to templates for generating documents.

Nintex Document Tagger
Workflow solutions that work in your industry and department With Nintex, it's never been quicker or easier to manage, automate, and optimize workflows and business processes. We offer visual process mapping, workflow automation, digital forms, and robotic process automation software solutions for every major industry and business department.

Process Management and Workflow Automation Software - Nintex
Help Documentation Product Downloads Feedback (User Voice) User Groups & Events. Responsive Forms ... Moving data with Nintex Workflow Cloud or NWC can be a very simple setup. This is a very common need... On: August 04, 2020 13:00:

Home - Nintex Community
A simple workflow on a SharePoint 2013 doc library is not starting. The workflow should start under these conditions: The doc library has check-out/check-in enabled. The workflow does not start whether the item's status is modified to Change Required, saved, and left checked out or whether modified to Change Required, saved and checked in.

Workflow on Document Library not starting - Nintex Community
The Workflow will reassign the document to the first reviewing department's "queue" and alert the department that they have an approval task waiting More often than not, the reviewing department will need to red-line/mark-up changes on the document and then return it to the initiator to accept/reject the changes (this is not a simple "Approve ...

Document Review/Approval Workflow - Nintex
Coming to Nintex Workflow example, here once a user uploads document in SharePoint Document Library, a workflow task will be created and an Email goes to Approver. Approver will check the document and Submitted as Rework Required or Approved or Rejected. Then Initiator will get an email about the status of the Document.

Nintex Document Approval Workflow in SharePoint Online ...
The Nintex Workflow Cloud API allows you to connect your own applications to the Nintex Workflow Cloud, giving you access to the workflows, tasks and instance data in your tenant. Connect your application to documents in Box, tickets in Zendesk, records in Salesforce, Microsoft SharePoint lists and a host of other services.

Nintex Workflow Cloud API | Nintex
I have a workflow which is trying to achieve two goals, 1) copy documents from a document set in a library (not the docset itself) to another document set (with folder structure) in another library in the same site; and 2) log the details of the copied files to the workflow history. The attached .nwf file is the workflow so far.

Copy documents from Document Set to Folder - Nintex Community
With Nintex Workflow Cloud, you can create an automated process to guide your document through as many reviews as it needs. With Nintex Workflow Cloud, in under 60 minutes, you can create a consistent automated process. In this workflow solution, when an author uploads their new marketing document into the Draft folder in Box

Automate your document approvals - Nintex
Create a new document library, and open the Nintex Workflow designer. Click on the Library tab, and select Nintex Workflow in the Ribbon. On the Workflow Gallery page, click New list workflow. For a related tutorial, see "Automate document review routing" in the Nintex Workflow for Office 365 help.

Simple Approval Workflow - Nintex Workflow for Off ...
In Nintex Workflow, to query for documents in a document set, you use a Query List action. I've found the easiest way to do this, is to add a Query List action to your workflow, configure it by selecting a list that contains your document set then add a field that you want to extract (usually the ID field).

Nintex Workflow - Querying a Document Set - Vadim Tabakman
Nintex Process Automation. Learn the skills you need to automate your end-to-end business processes with Nintex. Enroll in courses that teach you how to automate processes leveraging your preferred platform, including SharePoint on-premises, Office 365, and Nintex Workflow Cloud.