Configure Copy Case Conversations and Attachments

V9.6.1 and later

Overview

You can copy case conversation items and case attachments from one workflow instance to another. ***Starting from V10.8***, while copying the case conversations you can choose whether to copy case attachments or not.

The copying case conversations and attachments functionality helps especially when you want to split and merge cases.

Configure copying case conversations

1. In the Administration site, open the form.
2. Add a Built-In Command activity.
3. Select **Case Operations > Copy Case Conversation Items Between Cases.**
4. Click **Next**.
5. In the Input Parameters Binding screen, add the following command parameters:
   - workflowInstanceId: the Id of the workflow instance where you want to copy the conversation items.
   - source WorkflowInstanceId: the Id of the source workflow instance from where you want to copy the conversation items.
   - itemTypes: the types of conversation items you want to copy.
6. Click **Finish**.

Only Email, Message, and Task in Incoming or Sent states are copied.
Starting V9.8, Comments are also copied.

Configure copying case conversations by Unique Id (*From V10.8 onwards*)

1. In the Administration site, open the form.
2. Add a Built-In Command activity.
3. Select **Case Operations** > **Copy Case Conversation Items by Unique Id.**
4. Click **Next**.
5. In the Input Parameters Binding screen, add the following command parameters:
   - workflowInstaceId: Target workflow instance Id, where you want to copy the conversations. Default is 0.
   - sourceWorkflowInstaceId = Source workflow instance Id, from where you want to copy the conversation items. Default is 0.
   - ConversationItems: Array of conversation item unique Ids. Default is null.
   - ExcludeAttachments: To decide if attachments are to be copied or not. Default value is False, so no attachments will be copied by default.
6. Click **Finish**.

Configure copying case attachments

1. In the Administration site, open the form.
2. Add a Built-In Command activity.
3. Select **Case Operations** > **Copy Case Attachment Items Between Cases**
4. Click **Next**.

5. In the Input Parameters Binding screen, add the following command parameters:
   - workflowInstanceId: the Id of the workflow instance where you want to copy the attachments.
   - source WorkflowInstanceId: the Id of the source workflow instance from where you want to copy the attachments.
   - attachmentIds: the Id of attachments you want to copy.
6. Click **Finish**.