

Create Relationships with Triggers

Attaching Common Phrases (Disclaimers) to a job

In an earlier document we created a script component to create a bunch of buttons allowing the project manager to assign specific phrases (disclaimers) to the proposal in question. While the buttons worked, it wasn't without unpredictable behavior. Sometimes the buttons would work, and other times they would not. These inconsistencies necessitated a different approach.

As "most or all" of the disclaimers apply to every job, it made more sense to simply create relationships to the phrases instead of appending them to the notes sections. This solves two issues. First, it allows us to use the notes section for free-form notes beyond the disclaimers, and secondly, it allows us to list the individual phrases on the proposal in bulleted format.

We already have a Common Phrase object that allows the client to add/change/delete phrases.

Action	Display Order ▲	Common Phrase	Phrase Text
<input type="checkbox"/> Edit Del	1	Proposal Only	This is a proposal only. Contractual and scheduling details to be agreed upon before start of work. In order to guarantee pricing, TCC must be notified of proposal acceptance within 30 days of dated proposal.
<input type="checkbox"/> Edit Del	2	No Permits	Does not include permits, testing of material or subgrade. Existing subgrade deemed acceptable.
<input type="checkbox"/> Edit Del	3	Access	Access of work area to be provided (chute pour from readymix truck).
<input type="checkbox"/> Edit Del	4	No Sealer	Does not include sealers, (concrete or joint), joints other than sawcut 1/2" bituminous fiber or surface treatments.
<input type="checkbox"/> Edit Del	5	Concrete Only	Concrete work only, layout by others, to be cut and compacted to proper grade.
<input type="checkbox"/> Edit Del	6	Crew and Price	Priced based on one crew per day during normal daylight hours, Monday through Friday.
<input type="checkbox"/> Edit Del	7	Approximate Quantity	All quantities are approximate, final payment based on field measure.
<input type="checkbox"/> Edit Del	8	Work Payment	No work will be performed 60 (sixty) days past invoice date.
<input type="checkbox"/> Edit Del	9	Pump	If a pump is needed an additional fee is required.
<input type="checkbox"/> Edit Del	10	Bond	We do not intend to bond any work.
<input type="checkbox"/> Edit Del	11	Night Fee	If night work is performed, an additional fee is required.
<input type="checkbox"/> Edit Del	12	Binding	This proposal and notes will become part of any contract.
<input type="checkbox"/> Edit Del	13	Pay when Pay	Pay when pay terms will not exceed 60 days from invoice date including all change orders.

To accomplish this, we simply need a trigger that gets fired along with the other initialization triggers when a proposal gets created. It's a simple Object Script trigger that looks like this:

```
//run a query to return all phrases
var arr = rbv_api.selectQuery("select id from ccCommon_phrase",1000);
//loop through the phrases
for (var i=0;i<arr.length;i++){
  //get the id of the current phrase
  var phraseId = parseInt(arr[i][0]);
  //use attach to create the relationship.
  rbv_api.attach("R98639626", "ccProposal", {!id}, "ccCommon_phrase",
phraseId);
}
```

In the existing trigger to attach project documents, simply append the runTrigger call to the end of that trigger. (98640899 represents the id of the phrase trigger. We could also use the integration name)

```
rbv_api.runTrigger("ccProposal", {!id}, 98640899, false);
```

Now, once the proposal is created, all phrases are attached. The project manager can simply selectively remove whatever phrases don't apply.

Action	Display Order	Common Phrase	Phrase Text
<input type="checkbox"/> Edit Del Detach	1	Proposal Only	This is a proposal only. Contractual and scheduling details to be agreed upon before start of work. In order to guarantee pricing, TCC must be notified of proposal acceptance within 30 days of dated proposal.
<input type="checkbox"/> Edit Del Detach	2	No Permits	Does not include permits, testing of material or subgrade. Existing subgrade deemed acceptable.
<input checked="" type="checkbox"/> Edit Del Detach	3	Access	Access of work area to be provided (chute pour from readymix truck).
<input type="checkbox"/> Edit Del Detach	4	No Sealer	Does not include sealers, (concrete or joint), joints other than sawcut 1/2" bituminous fiber or surface treatments.
<input type="checkbox"/> Edit Del Detach	5	Concrete Only	Concrete work only, layout by others, to be cut and compacted to proper grade.
<input type="checkbox"/> Edit Del Detach	6	Crew and Price	Priced based on one crew per day during normal daylight hours, Monday through Friday.
<input checked="" type="checkbox"/> Edit Del Detach	7	Approximate Quantity	All quantities are approximate, final payment based on field measure.
<input type="checkbox"/> Edit Del Detach	8	Work Payment	No work will be performed 60 (sixty) days past invoice date.
<input type="checkbox"/> Edit Del Detach	9	Pump	If a pump is needed an additional fee is required.
<input type="checkbox"/> Edit Del Detach	10	Bond	We do not intend to bond any work.
<input checked="" type="checkbox"/> Edit Del Detach	11	Night Fee	If night work is performed, an additional fee is required.
<input type="checkbox"/> Edit Del Detach	12	Binding	This proposal and notes will become part of any contract.
<input type="checkbox"/> Edit Del Detach	13	Pay when Pay	Pay when pay terms will not exceed 60 days from invoice date including all change orders.