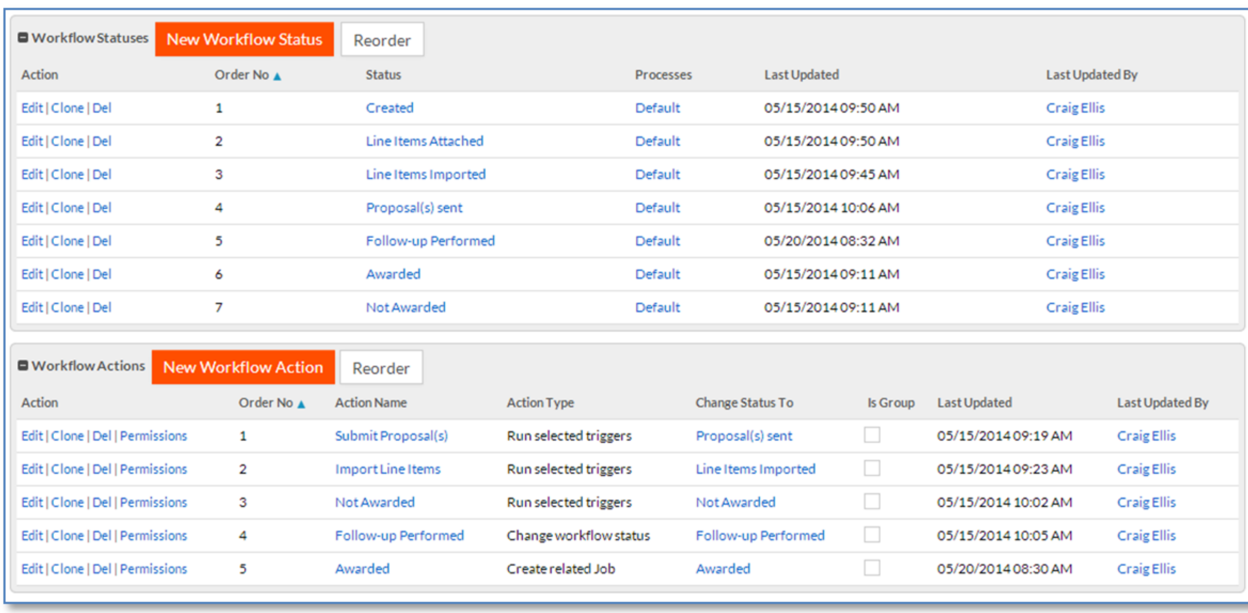
Using Workflow Actions

Using Workflow Actions vs. Buttons Calling Triggers

Up to this point we have used custom buttons to call triggers for various reasons, be it common phrases, or importing proposal line items, or even converting records from one type to another. While all of the buttons worked correctly, they all exhibited “odd” or “unreliable” behavior. Sometimes you’d click them and nothing would happen. Other times you’d click them, it would look like something happened, and yet nothing did. Other times they worked perfectly. Obviously this is not a production-ready approach.

Rollbase offers workflow automation functionality built in, and in retrospect, it’s the perfect solution. Our proposals have a logical flow associated with them, and as you achieve each respective step, new options will appear in the workflow action section of the UI. This document will cover each step and the associated functionality the takes place.



Workflow Statuses New Workflow Status Reorder

Action	Order No ▲	Status	Processes	Last Updated	Last Updated By
Edit | Clone | Del	1	Created	Default	05/15/2014 09:50 AM	Craig Ellis
Edit | Clone | Del	2	Line Items Attached	Default	05/15/2014 09:50 AM	Craig Ellis
Edit | Clone | Del	3	Line Items Imported	Default	05/15/2014 09:45 AM	Craig Ellis
Edit | Clone | Del	4	Proposal(s) sent	Default	05/15/2014 10:06 AM	Craig Ellis
Edit | Clone | Del	5	Follow-up Performed	Default	05/20/2014 08:32 AM	Craig Ellis
Edit | Clone | Del	6	Awarded	Default	05/15/2014 09:11 AM	Craig Ellis
Edit | Clone | Del	7	Not Awarded	Default	05/15/2014 09:11 AM	Craig Ellis

Workflow Actions New Workflow Action Reorder

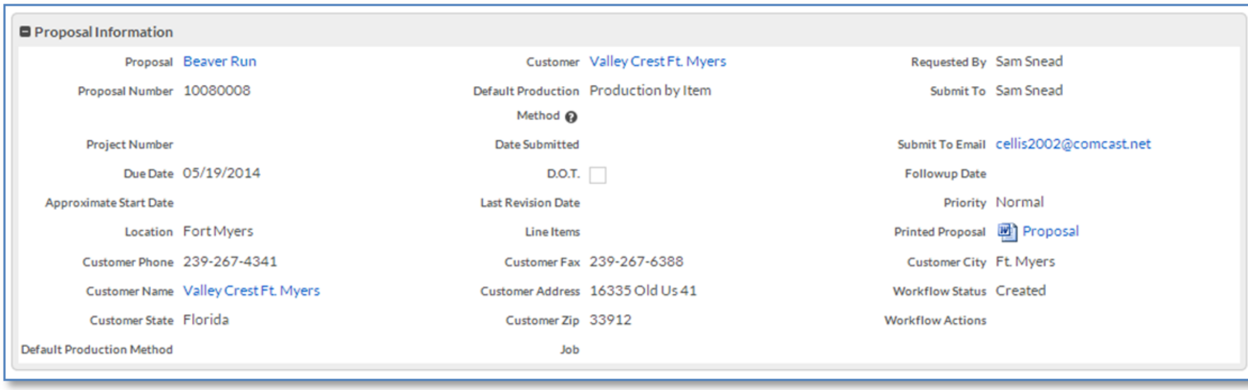
Action	Order No ▲	Action Name	Action Type	Change Status To	Is Group	Last Updated	Last Updated By
Edit | Clone | Del | Permissions	1	Submit Proposal(s)	Run selected triggers	Proposal(s) sent		05/15/2014 09:19 AM	Craig Ellis
Edit | Clone | Del | Permissions	2	Import Line Items	Run selected triggers	Line Items Imported		05/15/2014 09:23 AM	Craig Ellis
Edit | Clone | Del | Permissions	3	Not Awarded	Run selected triggers	Not Awarded		05/15/2014 10:02 AM	Craig Ellis
Edit | Clone | Del | Permissions	4	Follow-up Performed	Change workflow status	Follow-up Performed		05/15/2014 10:05 AM	Craig Ellis
Edit | Clone | Del | Permissions	5	Awarded	Create related Job	Awarded		05/20/2014 08:30 AM	Craig Ellis

Created

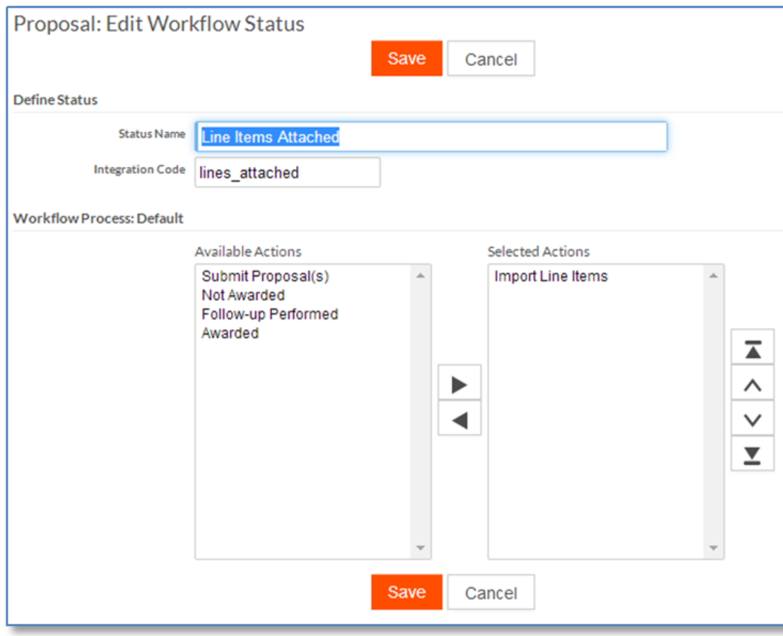
This is the default status given to any object with the workflow attribute assigned. It’s basically a holding place until you start doing something with your object. When we convert an opportunity into a proposal it is flagged as “Created”.

Once a proposal is created, the project manager must use PlanSwift to perform the item take-off from the site plans. Once completed, they are to export it to a CSV format and import it into Rollbase.

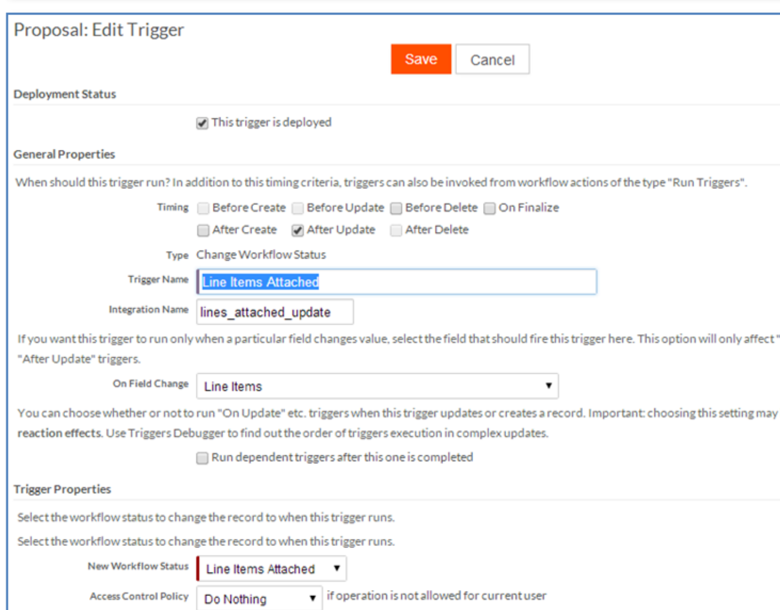
The following is a shot of a created proposal. Notice the field “Line Items” is not populated. Also notice that the Workflow Actions section has no available action.



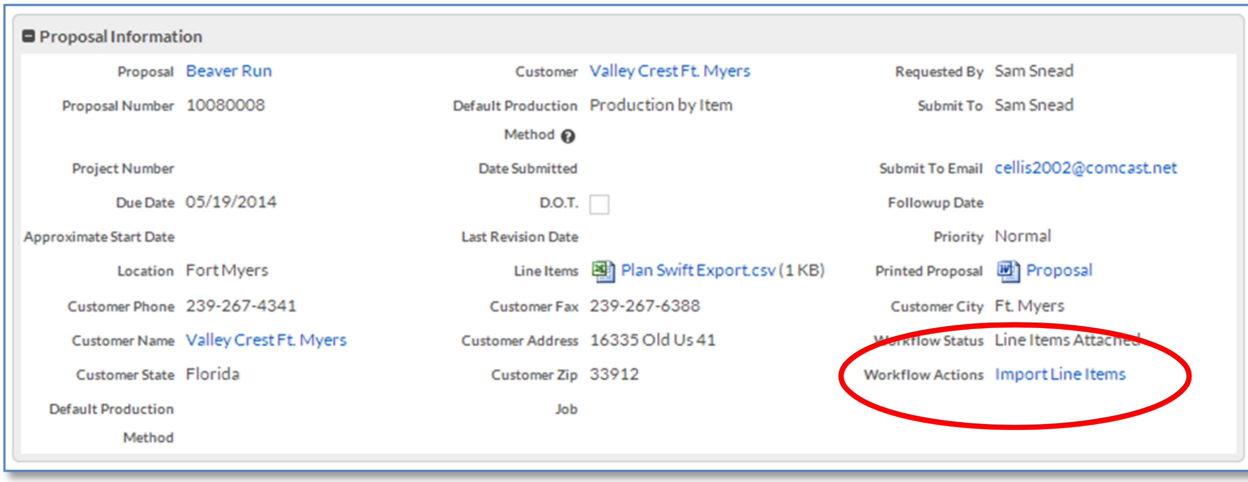
When the project manager successfully loads the CSV file to the Line Items field, we will fire a trigger of type “Change Workflow Status” after the record is updated, thus making the new status “Line Items Attached”.



The change workflow status trigger is defined as shown, changing the status when the Line Items field changes.



At this status, we want the user to be able to physically import the line items. Notice that after we upload the CSV file, the workflow action section is now populated with the next step in the process:

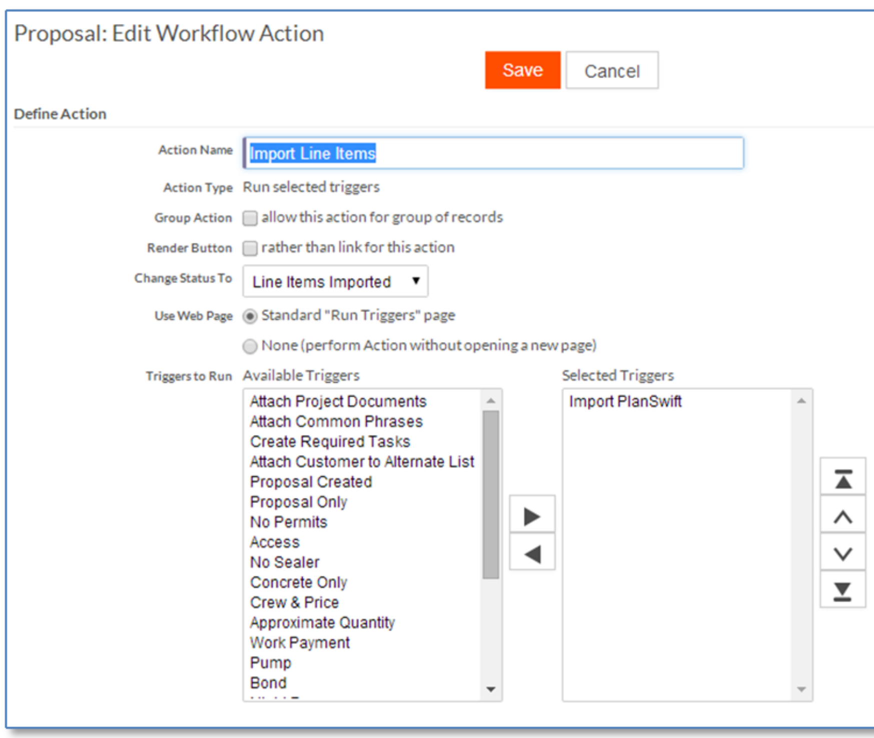


Importing the Line Items

This action calls a trigger that we wrote and used in a previous tutorial. It can be found here:

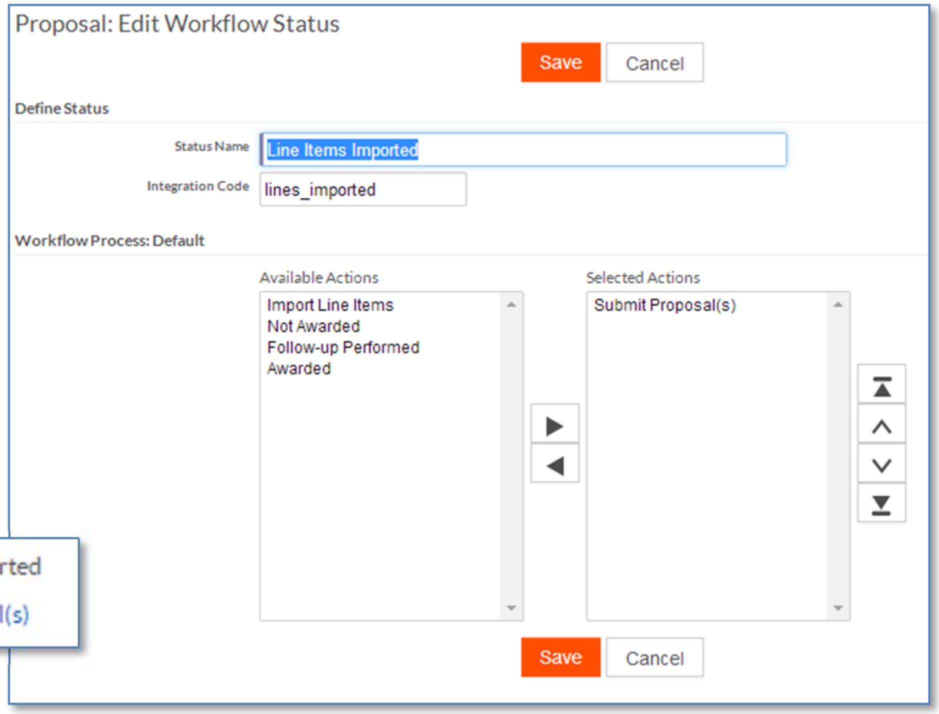
[Importing CSV with a Trigger]

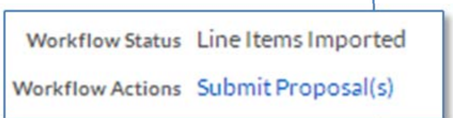
As you can see, it then sets the status to “Line Items Imported”.



Line Items Imported

Now that the meat of the proposal is completed, the Project Manager simply finishes the rest of the data entry associated with the proposal. When he/she is ready, they are ready to submit the proposal to the interested customers. Immediately after importing the line items, you'll see the next workflow action appear.



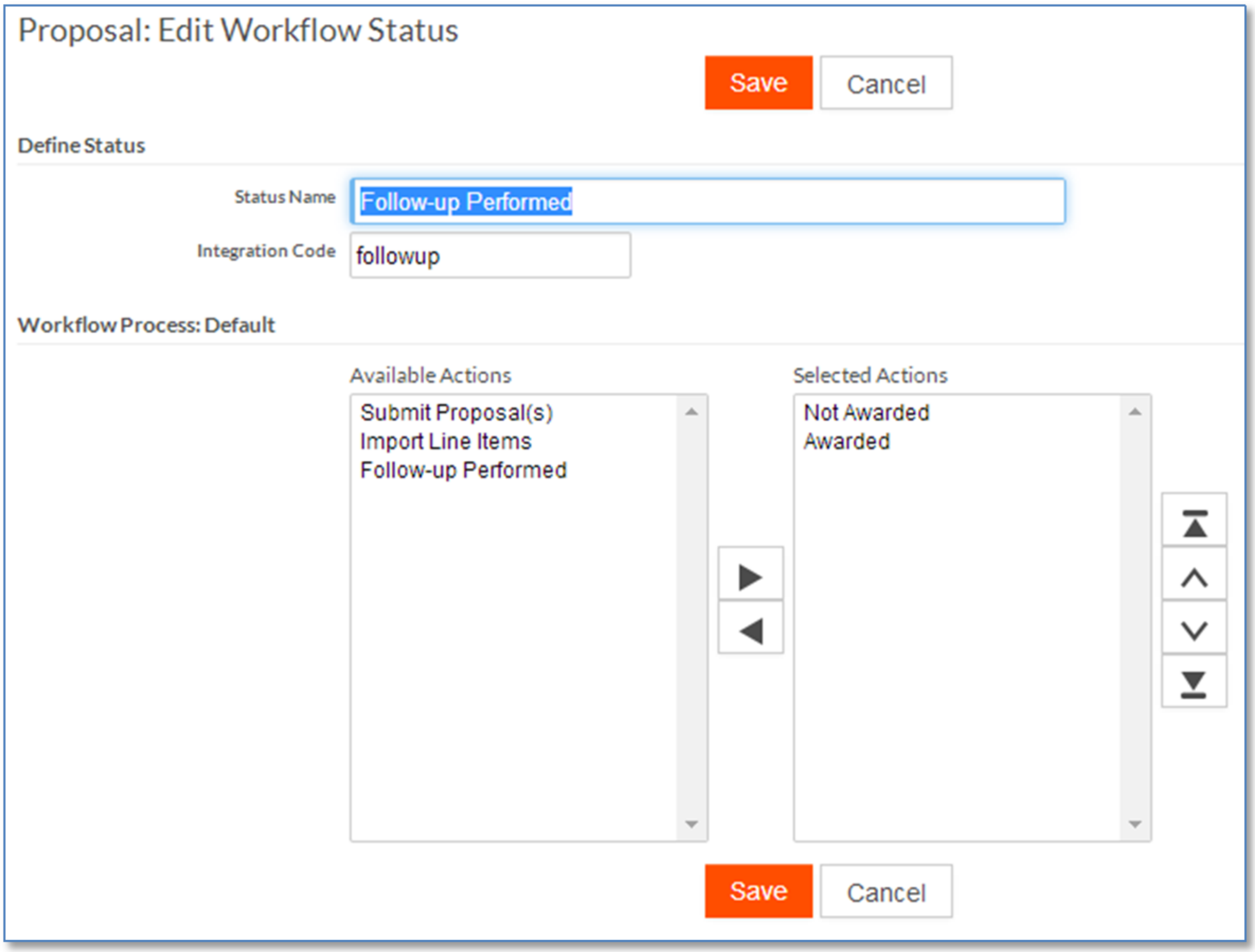


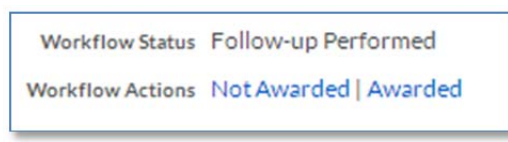
Submit Proposal(s)

This action calls a trigger called "Send Proposal" and sets the status to Proposal(s) sent and exposes the workflow action "Follow-up Performed". This trigger was previously covered in [Email Templates - Part 2]

The trigger in question not only sends the proposals via email, but it also created follow-up tasks for the Project Manger to attend to. We expect the PM's to follow up if nothing is heard within 14 days. Once the email or phone call for the follow-up has been performed, they will execute that action.

You are not limited to one action per status. Once we've gotten to this stage of the process, one of two things will occur; the proposal will either be accepted or rejected.





If the proposal is accepted, then they will click the Awarded action, which in turn calls a datamap to convert a proposal to a job. If it is not awarded, then the status will be set as such and an email template will be fired seeking feedback on what could have been done differently to have achieved success.