

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.

The screenshot displays two tables from the Rollbase interface. The top table, titled 'Workflow Statuses', has a 'New Workflow Status' button and a 'Reorder' button. It lists seven status steps with columns for Action, Order No., Status, Processes, Last Updated, and Last Updated By. The bottom table, titled 'Workflow Actions', has a 'New Workflow Action' button and a 'Reorder' button. It lists five actions with columns for Action, Order No., Action Name, Action Type, Change Status To, Is Group, Last Updated, and Last Updated By.

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	<input type="checkbox"/>	05/15/2014 09:19 AM	Craig Ellis
Edit Clone Del Permissions	2	Import Line Items	Run selected triggers	Line Items Imported	<input type="checkbox"/>	05/15/2014 09:23 AM	Craig Ellis
Edit Clone Del Permissions	3	Not Awarded	Run selected triggers	Not Awarded	<input type="checkbox"/>	05/15/2014 10:02 AM	Craig Ellis
Edit Clone Del Permissions	4	Follow-up Performed	Change workflow status	Follow-up Performed	<input type="checkbox"/>	05/15/2014 10:05 AM	Craig Ellis
Edit Clone Del Permissions	5	Awarded	Create related Job	Awarded	<input type="checkbox"/>	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.

Proposal Information

Proposal	Beaver Run	Customer	Valley Crest Ft. Myers	Requested By	Sam Snead
Proposal Number	10080008	Default Production	Production by Item	Submit To	Sam Snead
Project Number		Method		Submit To Email	cellis2002@comcast.net
Due Date	05/19/2014	Date Submitted		Followup Date	
Approximate Start Date		D.O.T.	<input type="checkbox"/>	Priority	Normal
Location	Fort Myers	Last Revision Date		Printed Proposal	Proposal
Customer Phone	239-267-4341	Line Items		Customer City	Ft. Myers
Customer Name	Valley Crest Ft. Myers	Customer Fax	239-267-6388	Workflow Status	Created
Customer State	Florida	Customer Address	16335 Old Us 41	Workflow Actions	
Default Production Method		Customer Zip	33912		
		Job			

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”.

Proposal: Edit Workflow Status

Save Cancel

Define Status

Status Name:

Integration Code:

Workflow Process: Default

Available Actions	Selected Actions
Submit Proposal(s)	Import Line Items
Not Awarded	
Follow-up Performed	
Awarded	

Save Cancel

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

Proposal: Edit Trigger

Save Cancel

Deployment Status

This trigger is deployed

General Properties

When should this trigger run? In addition to this timing criteria, triggers can also be invoked from workflow actions of the type "Run Triggers".

Timing: Before Create Before Update Before Delete On Finalize
 After Create After Update After Delete

Type: Change Workflow Status

Trigger Name:

Integration Name:

If you want this trigger to run only when a particular field changes value, select the field that should fire this trigger here. This option will only affect "After Update" triggers.

On Field Change:

You can choose whether or not to run "On Update" etc. triggers when this trigger updates or creates a record. Important: choosing this setting may lead to reaction effects. Use Triggers Debugger to find out the order of triggers execution in complex updates.

Run dependent triggers after this one is completed

Trigger Properties

Select the workflow status to change the record to when this trigger runs.

Select the workflow status to change the record to when this trigger runs.

New Workflow Status:

Access Control Policy: if operation is not allowed for current user

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:

The screenshot shows a 'Proposal Information' form with various fields. The 'Workflow Status' is 'Line Items Attached' and the 'Workflow Actions' is 'Import Line Items', which is circled in red. Other fields include Proposal Number 10080008, Customer Valley Crest Ft. Myers, and Date Submitted 05/19/2014.

Proposal	Beaver Run	Customer	Valley Crest Ft. Myers	Requested By	Sam Snead
Proposal Number	10080008	Default Production	Production by Item	Submit To	Sam Snead
Project Number		Method		Submit To Email	cellis2002@comcast.net
Due Date	05/19/2014	Date Submitted		Followup Date	
Approximate Start Date		D.O.T.	<input type="checkbox"/>	Priority	Normal
Location	Fort Myers	Last Revision Date		Printed Proposal	Proposal
Customer Phone	239-267-4341	Line Items	Plan Swift Export.csv (1 KB)	Customer City	Ft. Myers
Customer Name	Valley Crest Ft. Myers	Customer Fax	239-267-6388	Workflow Status	Line Items Attached
Customer State	Florida	Customer Address	16335 Old Us 41	Workflow Actions	Import Line Items
Default Production		Customer Zip	33912		
Method		Job			

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".

The screenshot shows the 'Proposals: Edit Workflow Action' dialog box. The 'Action Name' is 'Import Line Items'. The 'Action Type' is 'Run selected triggers'. The 'Group Action' is 'allow this action for group of records'. The 'Render Button' is 'rather than link for this action'. The 'Change Status To' is 'Line Items Imported'. The 'Use Web Page' is 'Standard "Run Triggers" page'. The 'Triggers to Run' list includes 'Import PlanSwift'.

Proposals: Edit Workflow Action

Save Cancel

Define Action

Action Name: Import Line Items

Action Type: Run selected triggers

Group Action: allow this action for group of records

Render Button: rather than link for this action

Change Status To: Line Items Imported

Use Web Page: Standard "Run Triggers" page
 None (perform Action without opening a new page)

Triggers to Run

Available Triggers

- Attach Project Documents
- Attach Common Phrases
- Create Required Tasks
- Attach Customer to Alternate List
- Proposal Created
- Proposal Only
- No Permits
- Access
- No Sealer
- Concrete Only
- Crew & Price
- Approximate Quantity
- Work Payment
- Pump
- Bond

Selected Triggers

- Import PlanSwift

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.

Workflow Status **Line Items Imported**
Workflow Actions **Submit Proposal(s)**

Proposal: Edit Workflow Status

Save Cancel

Define Status

Status Name **Line Items Imported**

Integration Code lines_imported

Workflow Process: Default

Available Actions

- Import Line Items
- Not Awarded
- Follow-up Performed
- Awarded

Selected Actions

- Submit Proposal(s)

Save Cancel

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.

Proposal: Edit Workflow Status

Define Status

Status Name

Integration Code

Workflow Process: Default

Available Actions

- Submit Proposal(s)
- Import Line Items
- Follow-up Performed

Selected Actions

- Not Awarded
- Awarded

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.

Workflow Status Follow-up Performed
 Workflow Actions Not Awarded | Awarded