Opportunity Object

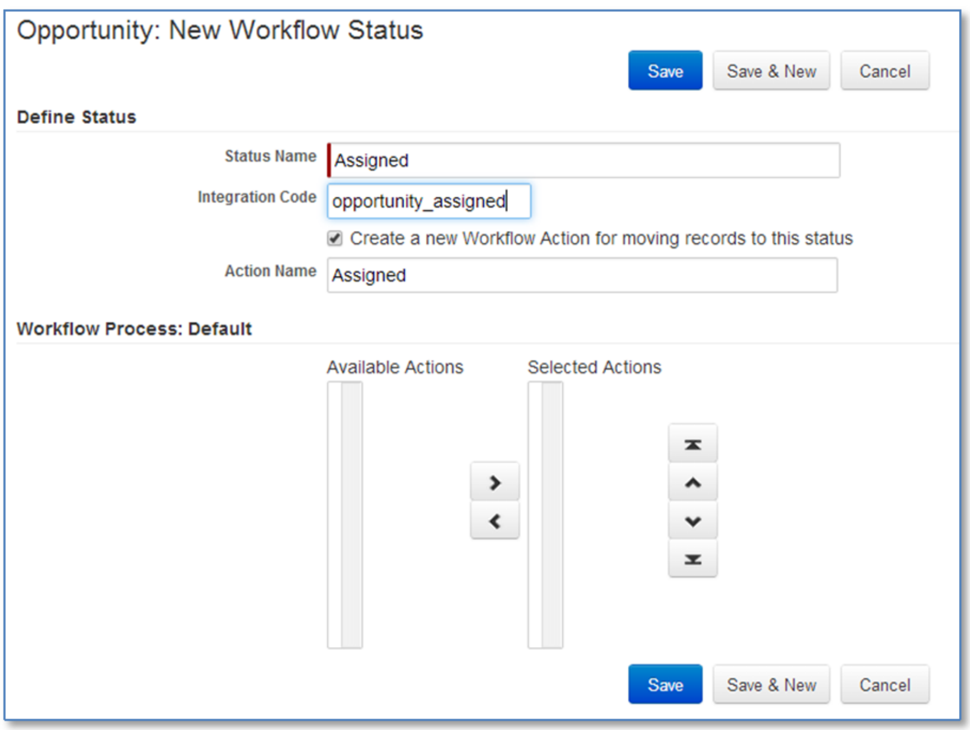
Managing Workflow Statuses and Processes

As the previous tutorial was getting a touch large, it was product to break of the concept of workflows into its own document. By default, when you create an object with a Workflow Attribute, it creates a default workflow process and a default status of "Created". In this example we want two more statuses ("Assigned" and "Proposed").

The "Assigned" status will occur when a user (project manager) takes ownership of the opportunity. We actually want this status to change by the simple action of selecting the user from the edit screen. Accomplishing our goal will require a few steps.

Create the Assigned Status

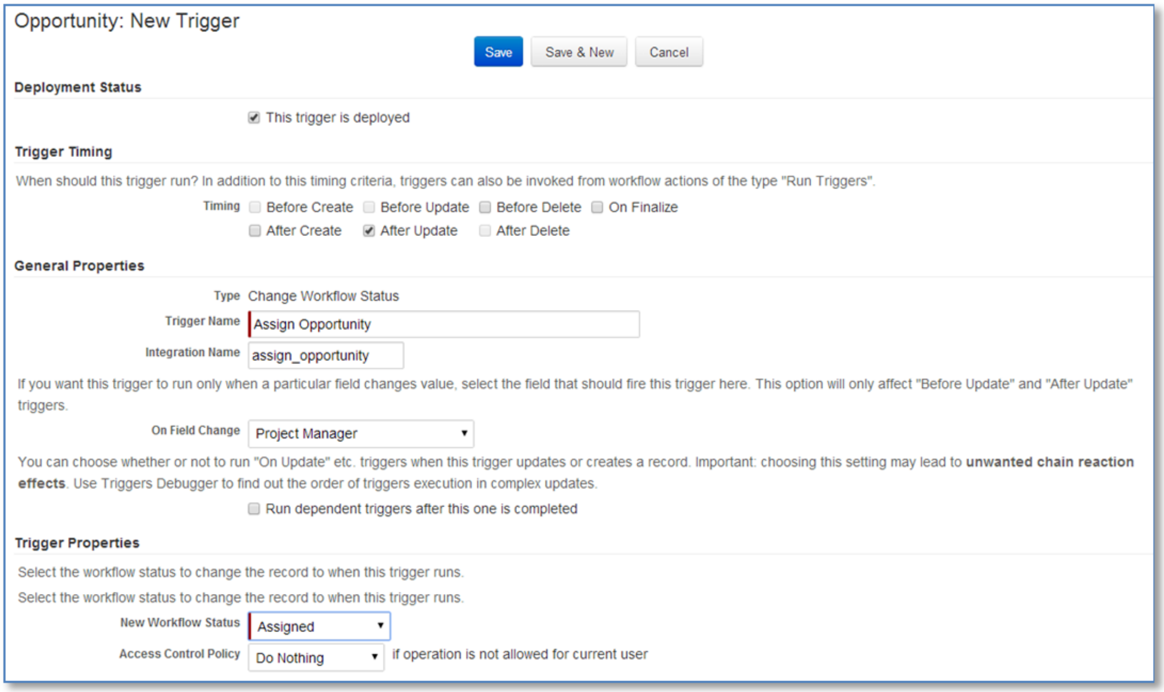
Under the Opportunity object definition, click on New Workflow Status button.



Give it a Status Name of "Assigned", an integration code (so can be called in scripts), and check the box to create the workflow action, with an action name of "Assigned". You should now notice in your object definition that you have a second status and now a new workflow action titled "Assigned". In order to invoke this action, we will need to create a trigger that can be fired when the "Assigned To" field changes. We have changed the label of the default "Assigned To" field to "Project Manager", because in essence, the project manager is a Rollbase user with a role of Project Manager.

Creating the Trigger

Click on the New Trigger button and pick the ◉ Change Workflow Status Data Manipulation Change this Record's Workflow Status.



We want the trigger to fire after any update, so select that checkbox for timing. Name the trigger "Assign Opportunity", give it an integration name, but we're going to only fire this trigger when the Project Manager field changes, so select that in the "On Field Change" drop down. Under the trigger properties section, we want to set a new workflow status of "Assigned".

Throughout the system, we do not want the workflow status to be able to be changed manually, thus the workflow action will never be used. That being said, I wanted to illustrate that an action will be created earlier if you check that box. If we wanted the action to be fired by having the status field change, then assigning the trigger to the action would be required. If you now edit an opportunity, select a Project Manager (user) and save, you'll notice that the status has now been updated.