

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.

Opportunity: New Workflow Status

Save Save & New Cancel

Define Status

Status Name Assigned

Integration Code opportunity_assigned

Create a new Workflow Action for moving records to this status

Action Name Assigned

Workflow Process: Default

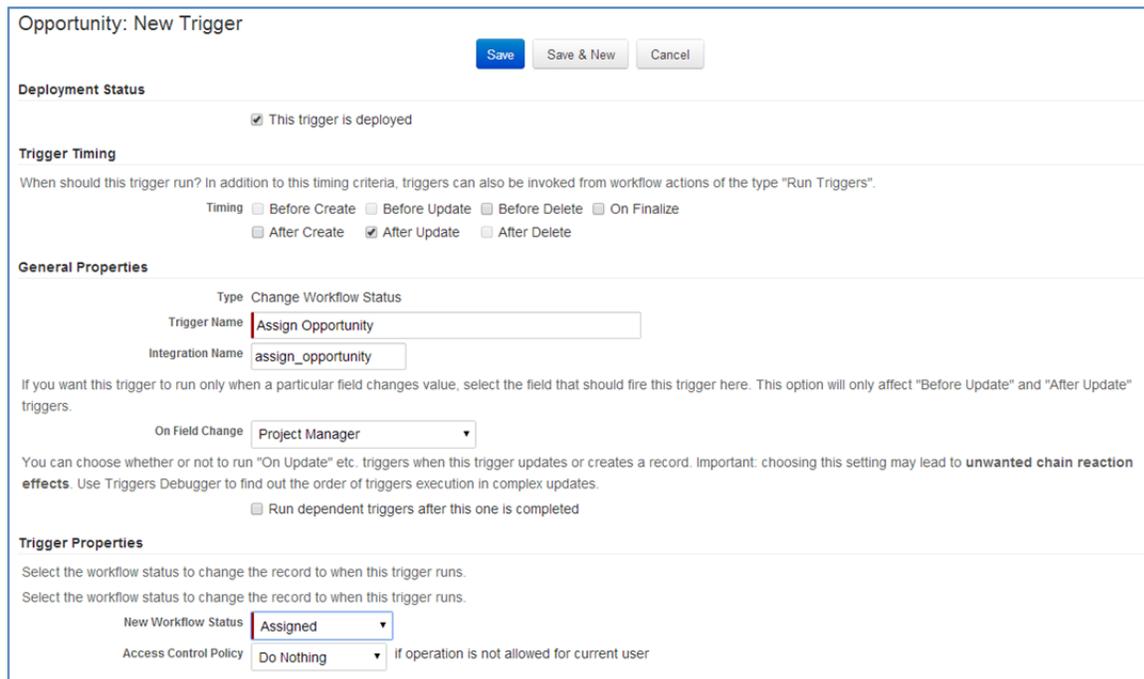
Available Actions Selected Actions

Save Save & New Cancel

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

A screenshot of a web form titled 'Opportunity: New Trigger'. The form has three main sections: 'Deployment Status', 'Trigger Timing', and 'General Properties'.
1. 'Deployment Status': A checkbox labeled 'This trigger is deployed' is checked.
2. 'Trigger Timing': A heading 'Trigger Timing' is followed by the text 'When should this trigger run? In addition to this timing criteria, triggers can also be invoked from workflow actions of the type "Run Triggers".' Below this are several radio button options: 'Before Create', 'Before Update', 'Before Delete', 'On Finalize', 'After Create', 'After Update' (which is checked), and 'After Delete'.
3. 'General Properties': A heading 'General Properties' is followed by 'Type Change Workflow Status'. Below are input fields for 'Trigger Name' (containing 'Assign Opportunity') and 'Integration Name' (containing 'assign_opportunity'). A note states: '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 "Before Update" and "After Update" triggers.' Below this is a dropdown menu for 'On Field Change' set to 'Project Manager'. Another note says: '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 unwanted chain reaction effects. Use Triggers Debugger to find out the order of triggers execution in complex updates.' Below this is a checkbox for 'Run dependent triggers after this one is completed' which is unchecked.
4. 'Trigger Properties': A heading 'Trigger Properties' is followed by the text 'Select the workflow status to change the record to when this trigger runs.' Below this is a dropdown menu for 'New Workflow Status' set to 'Assigned'. At the bottom, there is a dropdown for 'Access Control Policy' set to 'Do Nothing' with the text 'if operation is not allowed for current user' to its right.
At the top right of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

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.