

Gold Support Webinar Series:

Workflow Rules and Notifications

This webinar was created to provide an introduction to Workflow Rules in SI with 30-40 minutes of feature introduction and demonstration followed by a Q&A period.

Session Topics

- Overview of Workflow Rules
- Define your Process First
- Define your Team Roles
- Creating Workflow Rules
- Workflow Rule Examples

Notes

Overview of Workflow Rules

- **Workflow Rules can be created for four entity types**
 - **Projects**
 - **Purchase Orders**
 - **Tasks**
 - **Service Orders**
- **Workflow Rules**
 - **Trigger In App and e-mail Notifications (by entity, by role or specific user/e-mail)**
 - **Can place restrictions on editing and/or reporting**
 - **Can be triggered when an entity is created/updated/deleted or locked/unlocked**
 - **Execution criteria include status, cost, price, resource and other changes**

Notes

Define your Process First

- A well-defined process can be one part of having an effective team
- Larger teams require more structure and SI can help
- Create a flowchart outlining steps and milestones for your projects
- Customize the various status lists in SI
 - Use Project Status to leverage important project milestones
 - Match Purchase Order Status to your procurement process
 - Schedule Status should follow your scheduling, install and service process

Notes

ACTIVITY 1

Customize your Project Status List

1. Starting from the SI application, click Setup → Control Panel. The Control Panel opens.
2. In the Project section, double-click Project Status. This opens the Manage Project Status window.
3. To add a new status, Click New.
4. Type a name for the Status and set a State.
Note: States are Open, Won or Lost. All Statuses prior to contract should have the Open State. Statuses reflecting a project that was rejected, should have a State of Lost. All other Statuses should have the State set to Won. See Dashboards for more on using States.
5. Use the Arrange buttons to reorder Statuses (Move Up/Move Down).
6. Click Save and Close when finished.

ACTIVITY 2

Customize your Order Status List

1. Starting from the SI application, click Setup → Control Panel. The Control Panel opens.
2. In the Project section, double-click Order Status. This opens the Manage Order Status window.
3. To add a new status, Click New.
4. Type a name for the Status.
Note: POs set Order Status for project Items. If you create custom statuses for ordered items or received items, adjust the statuses appropriately in the bottom section of the window.
5. Use the Arrange buttons to reorder Statuses (Move Up/Move Down).
6. Click Save and Close when finished.

Notes

ACTIVITY 3

Customize your Schedule Status List

1. Starting from the SI application, click Setup → Control Panel. The Control Panel opens.
2. In the Schedule section, double-click Schedule Status. This opens the Manage Schedule Status window.
3. To add a new status, Click New.
4. Type a name for the Status.

Note: When using Mobile Install, an install status set to 'In Progress' or 'Completed' can be matched to custom Schedule Statuses. If you create custom Schedule Statuses, adjust the statuses appropriately in the bottom section of the window.

5. Use the Arrange buttons to reorder Statuses (Move Up/Move Down).
6. Click Save and Close when finished.

Notes

Define your Team Roles

- SI allows for users to be assigned to one or more roles
- Custom roles can be created to define as many roles as necessary
- Notifications can be sent to users of a specific role who are associated to an entity
- This allows Workflow Rules to be user agnostic
- If a user changes roles, the Workflow Rules continue to function

ACTIVITY 4

Add User Roles

1. Starting from the SI application, click Setup → Control Panel. The Control Panel opens.
2. In the User section, double-click Users. This opens the Manage Users window.
3. Click on the Roles button. The Manage Roles window opens.
4. Click New to add roles.
5. Click Save and Close when finished.
6. Double-click on a User record to open for editing.
7. Find the Roles drop-down menu and select one or more roles for the user.
8. Click Save and Close when finished.

Notes

Creating Workflow Rules

- All Workflow Rules have common elements
- First, choose the entity to create a rule (Project, PO, Task, SO)
- Next, choose the Execute On option
 - When entity is Created, Updated, Deleted
 - When entity or the entity's reports are Locked/Unlocked
- Then provide criteria to filter the triggering of the rule (choose one or more)
 - Filter to a specific User, User Role, Status or other changes
 - Criteria options will vary based on the entity chosen
 - See the SI Support Wiki for full details: [Workflow Rules Criteria](#)
- Select Users to Notify, add others via email, and type a message to display
- Finally, and optionally, set Actions to Lock the entity and/or reports

Notes

Workflow Rule Examples

- **Request for Quote** – Sales creates a project with scope of work and budget, then sets Project Status to “Request for Quote”
- **Notify Sales Manager of Project Margin below minimum %**
- **Assign PM to Project** – Notify the Ops Manager when a project is approved
- **SO needs to be scheduled** – User creates SO and sets Status “Needs to be scheduled”
- **SO Ready to Invoice** – Status set to “Ready to Invoice” after being reviewed for accuracy
- **PO Issued/Received** – Notify PM when PO status is Issued/Received (works with single PM)

Notes

ACTIVITY 5

Create a Project Workflow to Prompt the Ops Manager to Assign a PM to a New Job

Note: This workflow assumes you have a Project Status labeled 'Approved' or a similar status used to identify when a project is won.

1. Starting from the SI application, click Setup → Control Panel. The Control Panel opens.
2. In the Application section, double-click Workflow Rules. This opens the Manage Workflow Rules window.
3. Click on the New button. The Select Entity window opens.
4. Select the Project radio button and choose OK.
5. In the Execute On section, choose 'Update'.
6. Type a name for the rule.
7. In the Criteria section, check 'Status' and then choose 'Approved' from the drop-down menu.
8. Click the Notify tab.
9. In the SI Users section, click Add. The Add Users window opens.
10. Then choose one or more users from the list. Click Add.
11. Click Save and Close when finished.

Notes

ACTIVITY 6

Create a Project Workflow to Prompt the Sales Manager when the margin for a project drops below a minimum threshold

1. Starting from the SI application, click Setup → Control Panel. The Control Panel opens.
2. In the Application section, double-click Workflow Rules. This opens the Manage Workflow Rules window.
3. Click on the New button. The Select Entity window opens.
4. Select the Project radio button and choose OK.
5. In the Execute On section, choose 'Update'.
6. Type a name for the rule.
7. In the Criteria section
 - a. check 'Margin'
 - b. Choose 'Less Than' from the drop-down menu
 - c. Enter a minimum percent to trigger the rule
8. Click the Notify tab.
9. In the SI Users section, click Add. The Add Users window opens.
10. Then choose one or more users from the list. Click Add.
11. Click Save and Close when finished.

Notes

ACTIVITY 7

Create a Service Order Workflow to Prompt the Accounting Team when a Service Order has been reviewed and is ready to invoice

Note: This workflow assumes you have a Schedule Status labeled 'Ready to Invoice' or a similar status.

1. Starting from the SI application, click Setup → Control Panel. The Control Panel opens.
2. In the Application section, double-click Workflow Rules. This opens the Manage Workflow Rules window.
3. Click on the New button. The Select Entity window opens.
4. Select the Service Order radio button and choose OK.
5. In the Execute On section, choose 'Update'.
6. Type a name for the rule.
7. In the Criteria section, check 'Status' and then choose 'Ready to Invoice' from the drop-down menu.
8. Click the Notify tab.
9. In the SI Users section, click Add. The Add Users window opens.
10. Then choose one or more users from the list. Click Add.
11. Click Save and Close when finished.

Notes

Next Steps

- This session serves as an introduction to **Multiple Currency Support**
- For more information about projects you can sign up for our upcoming webinars:
 - **Projects**
 - **Customer Portal**
 - **Revisions and Change Orders**
- You can also sign up for our upcoming training events:
 - **3-Day Regional Training Events**
 - **Individual Online Training Sessions**
- **Any questions?**

Notes

Training content complete

- **Support Resources Available**
 - **D-Tools Application Home Page Links**
 - [Documentation](#) – open the Support Wiki
 - [Support Ticket](#) – open the web page to create a support ticket
 - [Chat With Us](#) – Click the blue chat icon (lower left)
 - **From any D-Tools software interface, click Learn More**
 - Found in the upper-right corner
 - Launches the Support Wiki
 - **Open the Support Wiki directly at support.d-tools.com**
 - **Send an email to support@d-toolshelp.com**
 - **Call 866.386.6571**

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