

New Workflow

New Workflow Properties

Workflow Title: give your Workflow some descriptive name.

Description: it is useful, don't be lazy to add it here, after some time you will see that it's useful.

Workflow is Active: Yes/No

When is the Workflow Triggered?

At Update

The Workflow is automatically started (Actions executed), once the object (Task, Project, Activity, etc.) is updated.

After Create

The Workflow is automatically started (Actions executed), once the object (Folder (Client), Sales Opportunity (Project), etc.) is created.

Managed by Time

Atollon Trolls poke the box every 15 minutes to see whether some Workflows that are managed by time meet conditions to be executed. Once Trolls find out that there are objects meeting conditions, it will automatically execute them.

Workflow Conditions

Workflow is executed automatically on all objects that meet one of the Workflow's conditions.

Filter Before Change

This is one of the crucial conditions, once you don't want to execute Workflow on all objects. You may, for example, set type & status of Project or Tasks that will cause the Workflow to be executed.

You may also add **Workflow Filters** that will be additional criteria to those that are directly associated to the object. For example, when executing Workflow on Sales Opportunity (Project Type = "Sales Opportunity"), you may want to execute it only for active clients (set-up Workflow Filter for Folder Type = Client & Status = Active).

Changed Fields

This condition makes the Workflow appropriate only once one of the selected fields is changed. This condition has sense only on Workflows that are based on object **Update**.

Use this criteria when running Workflow based on (for example) Project Status change.

Scenario: Set-up WF leading to request feedback from client on contract

Create Task "Request feedback in 3 days" (Execute Action based on Task Template) when Sales Opportunity status is switched to "Contract Phase" (Project Type = "Sales Opportunity" and Custom Status = "Contract").

Filter After Change

Once you want to run the Workflow only if specific change happened in Atollon (after object was created or updated), use this filter to identify, what is the resulting state of the object that should trigger Workflow start. The Filter Before Change is applied at the same time, once you want to check what was the state of the object before change.

Scenario: Start WF only once project status changed from "C" to "A"

There might be will to execute Workflow only once the project was changed from state A to state B or vice versa. This will require to set-up Filter before change (Project Custom Status = "C") and set-up Filter After Change (Project Custom Status = "A").

Workflow Actions

Select Actions that should be executed, once Workflow conditions are met. If no Action is selected, Workflow has no sense.

Get more info on how to [Create new Action](#).

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