BASIC WORKFLOW

Workshop

Basic Workflow Workshop

Overview

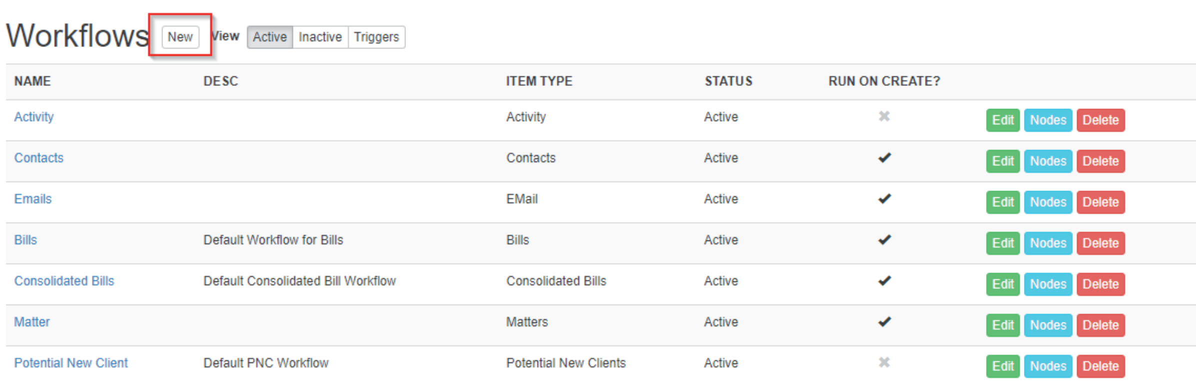
In this workshop, we will cover how to create a basic workflow.

Centerbase has the unique ability to manage the process of moving a Potential New Client (PNC) for law firms. In this workshop, we will create a basic workflow that begins once a PNC is created, which allows the user to refer the PNC out or set who the PNC was referred by.

Workshop Step by Step

First, let’s create a new workflow.

- Click on the **Gear** in the bottom of your main navigation in Centerbase and select **Manage Workflows.**
- Click the **New** button in the top left corner of the page.


Workflows New View Active Inactive Triggers

NAME	DESC	ITEM TYPE	STATUS	RUN ON CREATE?	
Activity		Activity	Active	✖	Edit Nodes Delete
Contacts		Contacts	Active	✔	Edit Nodes Delete
Emails		EMail	Active	✔	Edit Nodes Delete
Bills	Default Workflow for Bills	Bills	Active	✔	Edit Nodes Delete
Consolidated Bills	Default Consolidated Bill Workflow	Consolidated Bills	Active	✔	Edit Nodes Delete
Matter		Matters	Active	✔	Edit Nodes Delete
Potential New Client	Default PNC Workflow	Potential New Clients	Active	✖	Edit Nodes Delete

- Fill in all required information on the **Create Workflow** page.

  Name: Potential New Client

  Description: (Optional)

  Item Type: Potential New Client

  Status: Active

  On Item Creation Run This Workflow?: False (We will mark this as True later on).

  *Note: When building a workflow, do not mark **On Object Create Run This Workflow?** as true, until you’ve finished building your workflow and have tested it thoroughly, especially if your workflow sends out emails.*

- Once you’ve filled out the required information, click on **Create**.

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At this point, you will be returned to the main workflow page.

To begin creating our workflow, we will start by making sure we have all the fields we will need.

- Open your **Windows Administrative Tool**. If you don't have it on your computer, navigate to:
    - www.support.centerbase.com
    - Click on the **Downloads** icon
    - Then click the section:
        - "Windows Administrative Tool Downloads"
- Once you log in, navigate to the **Admin** ribbon and click on the **Item Manager**.
- Double click on the following Item Types and make sure you have the corresponding non-system fields:
    - **Potential New Client**
        - **Last Updated** – Date field
        - **Last Updated by** – Lookup field to Users
        - **Referral Code –** Text field with 3 dropdown values: Advertising, Attorney, Mental Health Institution
        - **Referral Date -** Date
        - **Referred To –** Lookup field to Contacts
        - **Referred by Name -** Text
        - **Status –** Text
    - **Referrals**
        - **Received Referral -** True/False field
        - **Referral Code –** Text field with 3 dropdown values: Advertising, Attorney, Mental Health Institution
        - **Referral Partner** – Look up field to Contacts
        - **Sent Referral** – True/False field
        - **WF - Sent/Received** – Text field

While you're in the item manager, we will set the auto-naming for referrals.

- Double click **Referral** in the Item Manager.
- Set **Enable auto-naming** to **True.**
- Set the auto-naming sequence to **Referral <<WF-Sent/Received>><<Referral Partner>> - <<Creation Date>>** (anything inside <<>> is a field name. Add the field by clicking the **f** to the right of the name).

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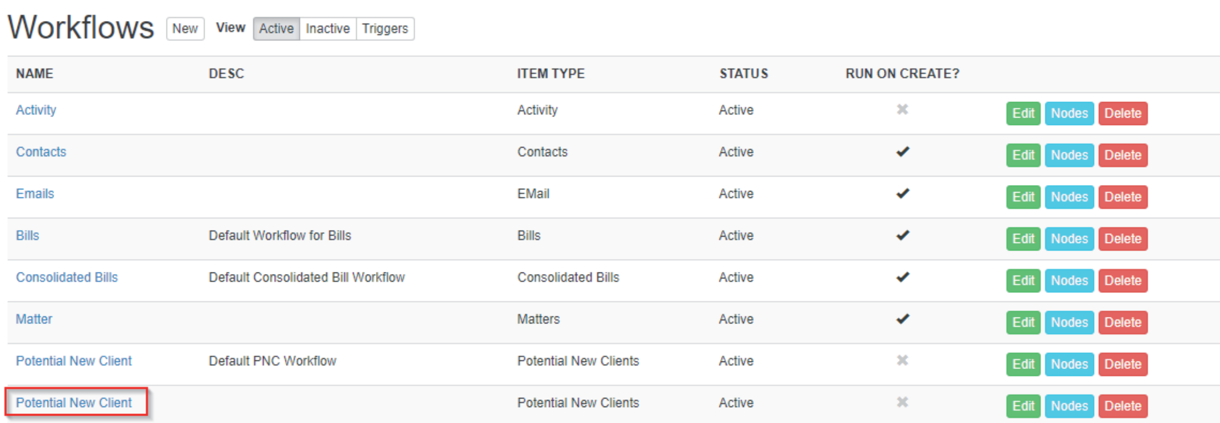
- Click **OK** to save.

Now that we have all the fields we will need in our workflow and our auto-naming set up, we will begin configuring the Nodes, Actions and Commands.

Note: If your workflow has queries, email templates or document merges, creating them first will save you time in the long run.

- From the main Workflow page, click on the name of the new workflow you created.



NAME	DESC	ITEM TYPE	STATUS	RUN ON CREATE?	
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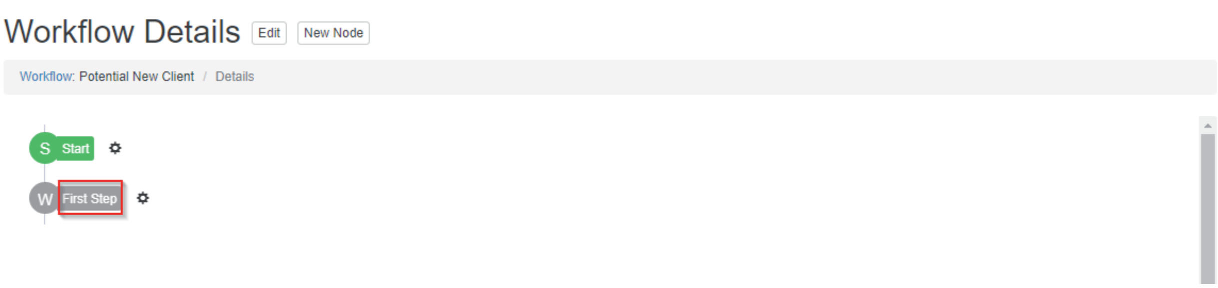
Bills	Default Workflow for Bills	Bills	Active	✔	Edit Nodes Delete
Consolidated Bills	Default Consolidated Bill Workflow	Consolidated Bills	Active	✔	Edit Nodes Delete
Matter		Matters	Active	✔	Edit Nodes Delete
Potential New Client	Default PNC Workflow	Potential New Clients	Active	✖	Edit Nodes Delete
Potential New Client		Potential New Clients	Active	✖	Edit Nodes Delete

- Once you click on the name of your workflow, you will be brought to the **Workflow Details** page. You should see two Nodes; a green **Start** Node and a grey **Wait** Node titled *First Step*. Click on the words ***First Step***.



Note: Clicking on the letter next to the name of a Node, will reveal the Actions related to that Node (example: The W next to First Step). Clicking on the name of the Node will reveal the Edit Node options (example: The words First Step next to the W).

- Rename the name of the node to ***Working Potential New Client Inquiry*** and click **Save**.

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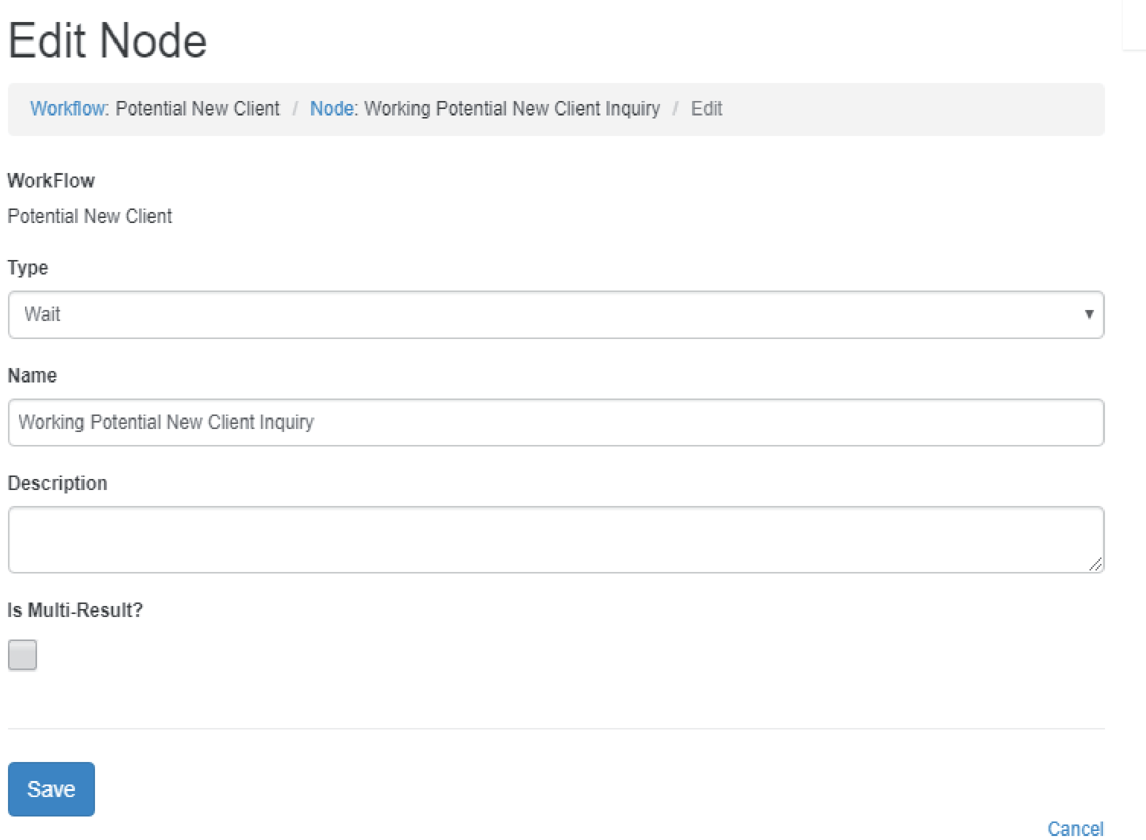

Next, we will create a Conditional Node to house the Automatic Actions associated with referring out a PNC.

- Click on **New Node** next to Workflow Details.

- Create a Command Node with the following information and click **Save.**

  Type: Condition

  Name: Refer Out

  Description: (Optional)

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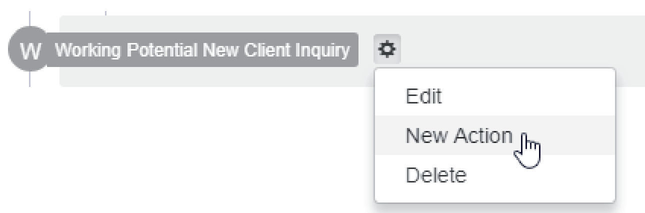
Note: A Conditional Node acts the same as a Wait Node. Conditional Nodes are used to visually differentiate between Nodes that only house Automatic Actions vs. Wait Notes that traditionally have User Actions.

- Hit **F5** to refresh your workflow.

Next, we will make a User Action that will generate a button for the user to click on to fill out a form and refer out to the Potential Client.

- Click on the **Gear** next to the **Working Potential New Client** Wait Node and select **New Action.**



- Build a new User Action to refer out the PNC by filling in the following information on the **Create Actions** screen and then click **Save**.

  Name: Refer Out

  Description: (Optional)

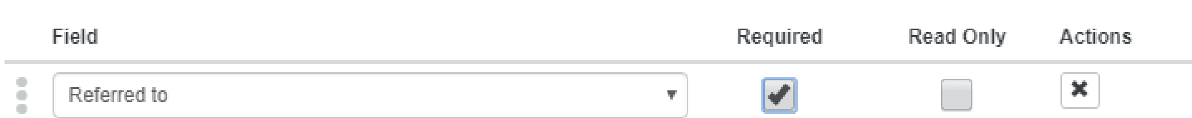
  Type: User Action

  From Node: Working Potential New Client

  To Node: Refer Out

  Query: (Blank)

- Click **F5** on your keyboard to refresh your workflow.
- Click the **W** to the left of Working Potential New Inquiry to expand the actions below the node.
- Click on the **Gear** to the right of the **Refer Out** User Action and click on **Add Form.**
- Once the **Action Form** appears, click **Add Field** and select the **Referred To** field from the dropdown menu, then set **Required To** field to **True** and click **Save**.



Next, we will create the Automatic Action under the **Refer Out** Conditional Node that will fire off Commands to update fields on the Potential New Client record and create a Referral record.

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- Click on gear next to the **Refer Out** Conditional Node and select **New Action.**
- Build a new Automatic Action that triggers the Commands to update the PNC fields and create the Referral record by filling in the following information on the **Create Actions** screen and then click **Save**.

Name: Update Potential Client Record & Create Referral Record

Description: (Optional)

Type: Automatic Action

From Node: Refer Out

To Node: Working Potential New Client

Query: (Blank)

- Click **F5** on your keyboard to refresh your workflow.
- Click the **C** to the left of the **Refer Out** Conditional Node to expand the actions below the Node.
- Click on the gear to the right of the **Update Potential Client Record & Create Referral Record** Action and select **New Update Command.**
- Build a new Update Command that updates fields on the PNC by filling in the following information on the **Update Command** screen and click **Save**.

Item to update: Potential New Client

Field to Set	Value Type	Value
Status	Text Value	Referred Out
Last Update	Current User	
Last Updated By	Current Date/Time	

- Click on the gear next to **Update Potential Client Record & Create Referral Record** Action and select **New Create Command.**
- Build a new Create Command that creates a new Referral record by filling in the following information on the **Create Command** screen and click **save**.

Item Type: Referral

Name: (Blank – this will be set by auto-naming)

Set look up field: Potential New Client.Referral Record

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*Note: If **Potential New Client. Referral Record** does not appear, go into your Data View in the Windows Administrative Tool and activate Referral Record under Potential New Client.*

Field to Set	Value Type	Value
Name	Potential New Client	Name
Referral Partner	Potential New Client	Referred To
WF – Sent/Received	Text Value	sent to
Sent Referral	Text Value	Is True
Referral Date	Current Date	

Next, we will create Conditional Nodes that are associated with setting the referral source.

- Click on **New Node** next to Workflow Details.
- Create a Command Node with the following information and click **Save.**

  Type: Condition

  Name: Create New Contact

  Description: (Optional)

- Click on **New Node** next to Workflow Details.
- Create a Command Node with the following information and click **Save.**

  Type: Condition

  Name: Create Referral Record

  Description: (Optional)

Next, we will make a User Action that will generate a button for the user to click to fill out a form and set the referral source.

- Click on the gear next to the **Working Potential New Client** Wait Node and select **New Action**
- Build a new User Action to Set the Referral Source on the PNC by filling in the following information on the **Create Action** screen and then click **Save.**

  Name: Add A Referral Source

  Description: (Optional)

  Type: User Action

  From Node: Working Potential New Client

  To Node: Create New Contact

- Click **F5** on your keyboard to refresh your workflow.

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- Click the **W** to the left of Working Potential New Inquiry to expand the Actions below the node.
- Click on the gear to the right of the **Add a Referral Source** User Action and click on **Add Form.**
- Once the Action Form appears, click **Add Field** and set the following fields then click **Save**.

Referred By Name

Referral Code

Next, we will create the Automatic Action under the **Create New Contact** Conditional Node that will house the Command to create a new contact record and send the workflow to its next step.

- Click on the **Gear** to the right of the **Create New Contact** Conditional Node and select **New Action.**
- Build a new Automatic Action that triggers the Command for creating a new Contact record by filling in the following information on the **Create Actions** screen and then click **Save**.

Name: Create New Contact

Type: Automatic Action

From Node: Create New Contact

To Node: Create Referral Record

- Click **F5** on your keyboard to refresh your workflow.
- Click the **C** to the left of the **Create New Contact** Conditional Node to expand the Actions below the Node.
- Click the **Gear** to the right of the **Create New Contact** Automatic Action and select **New Create Command.**
- Create a new Contact record by filling in the **Create Command** form with the following information and then click **Save.**

Item Type – Contact

Name – (Blank)

Set lookup field – Potential New Client. Referred by

Link to the main potential client – True

Field to Set	Value type	Value
Name	Potential New Client	Referred by Name

- Click on the **Gear** to the right of the **Create Referral Record** Conditional Node and select **New Action.**

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- Build a new Automatic Action that triggers the Command to create a new referral record by filling in the following information on the **Create Actions** screen and then click **Save**.

  Name: Create Referral Record

  Type: Automatic Action

  From Node: Create Referral Record

  To Node: Working Potential New Client Inquiry

- Click **F5** on your keyboard to refresh your workflow.
- Click the **C** to the left of **Create Referral Record** Conditional Node to expand the actions below the Node.
- Click the **Gear** to the right of the **Create Referral Record** Automatic Action and select **New Create Command.**
- Create a new Referral record by filling in the Create Command form with the following information and then click **Save.**

  Item Type – Referral

  Name – (Blank)

  Set lookup field – Potential New Client. Referral Record

  Link to the main potential client – True

Field to set	Value type	Value
Name	Potential New Client	Name
Referral Partner	Potential New Client	Referred by
Received Referral	Text Value	Is true
WF – Sent/Received	Text Value	Received from
Referral Date	Current Date/Time	
Referral Code	Potential New Client	Referral Code
Client	Potential New Client	Contact

We have completed our workflow. Now test the workflow to make sure it works correctly. Once you've tested the workflow, set **On Object Create Run This Workflow?** In your workflow options as **True** and you're ready to go!