Project Automation

Project Automation allows the user to automate routine tasks, and applies rules for repetitive functions. With Workflow Rules, you can define conditions and actions to automatically trigger specific actions based on predefined criteria. This helps in time management, reduces manual effort, and ensure consistency.

Use cases

Software development/ IT: When a feature needs to be developed, a group of developers under a project manager has to be assigned. In such cases, with the help of workflow rules, you can update the *Team* field based on the project manager chosen.

Manufacturing: A car company manufactures its spare parts in different parts of the world. When a particular spare part is entered in a field, they would like to automatically choose the respective country where the product gets manufactured.

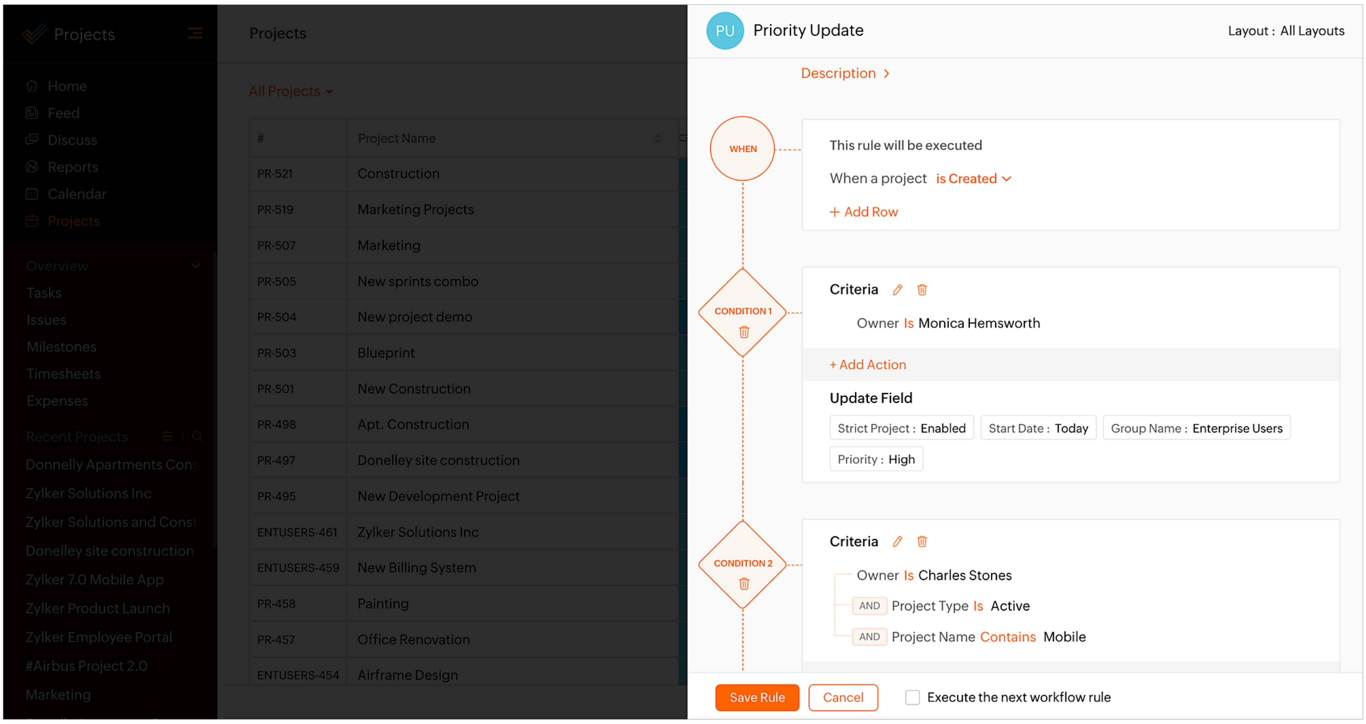
Marketing: Once the content for a pamphlet is finalized, the status of the task moves to Design. The Design team shouldn't take more than a week to finish designing the pamphlet. So, we can create a workflow rule to update the completion date field to seven days after the current date when the status changes to Design.

Add a Workflow Rule

1. Select a project either from the Recent Projects section or the **Projects** tab in the left navigation panel.
2. Click **Automation** in the upper right corner, click **New Workflow Rule**.
3. Enter a *Rule Name* and a *Description*.
4. Associate the rule with a project layout from the drop-down.
5. Select the triggers for the rule to execute the workflow rule on. Multiple triggers can be selected.
    - **Created:** The rule will trigger when the project is created.
    - **Updated:** The rule will trigger when the project is updated. The rule can be set to trigger for specific field updates. To select a specific field, click (any fields) and check the fields.

- **Commented:** The rule will trigger when a comment is added to the project.
- **Deleted:** The rule will trigger when a project is deleted.
- **Document is attached:** The rule will trigger when the document is attached to the project.

6. Click *Add Criteria* under Condition 1, choose a criteria and select value from the given options.
7. Multiple criteria can be added under the same condition by hovering over the criteria and clicking + icon on the right side.
8. Click **Done** to set criteria.
9. Click **Add Action**, choose an action from the given options.
    - **Update Field:** Update specific fields with a predetermined value
    - **Associate Webhook**: The Webhook will be triggered when the criteria is met.
    - **Associate Custom Function:** The Custom Function will be triggered when the criteria is met.
    - **Associate Email Alert**: Trigger an email notification when the criteria are met.
10. Click + below the condition to add the next condition.
11. Check the Execute the next workflow rule box if you want to execute the next workflow rule in the Workflow Rule list view.
12. Click **Save Rule.**



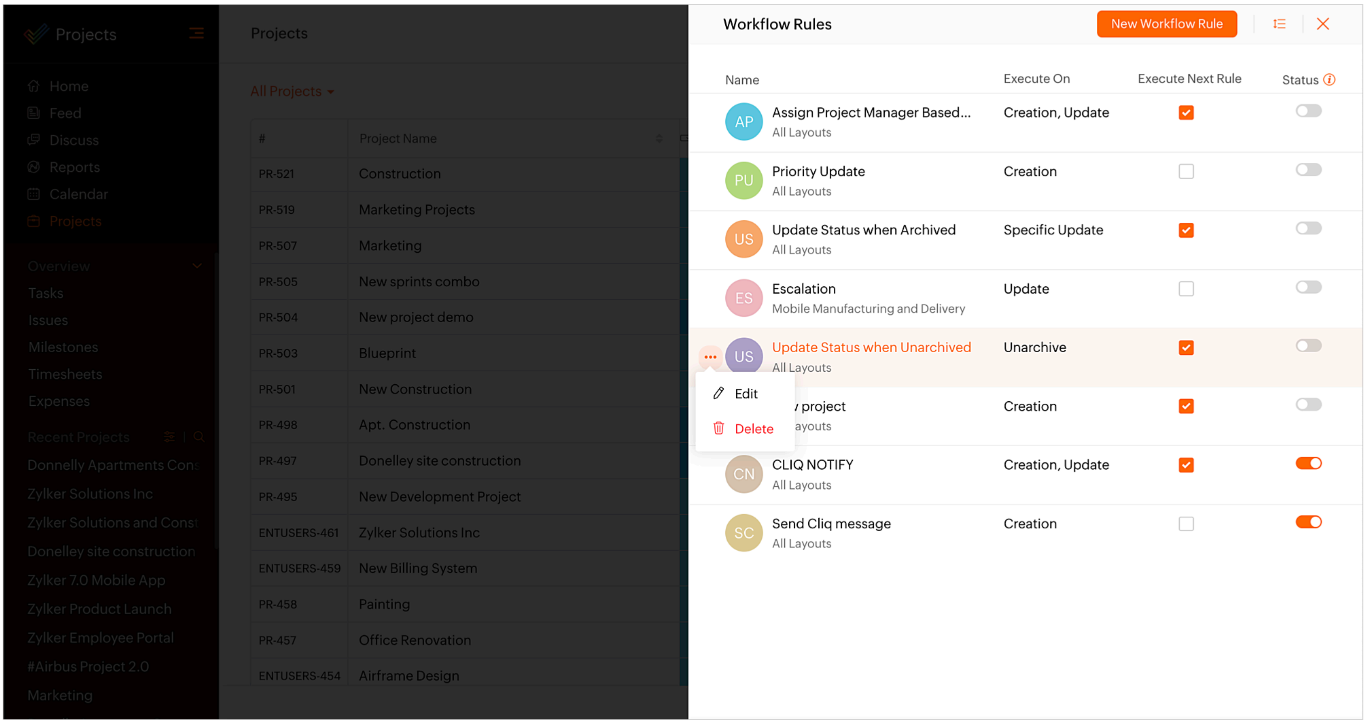
Note: Multiple criteria and actions can be added.

Edit Workflow Rule

1. Navigate to the **Projects** tab in the left navigation panel.
2. Click **Automation** in the upper right corner.
3. Hover over an existing workflow rule, click ••• > *Edit*.
4. Make the necessary changes, click **Save Rule** > Apply changes.

Delete Workflow Rule

1. Navigate to the **Projects** tab in the left navigation panel.
2. Click **Automation** in the upper right corner.
3. Hover over an existing workflow rule, click ••• > *Delete*.
4. Confirm your action.



Reorder Workflow Rules

1. Click > click, drag and drop the workflow rule as needed.
2. Click Save Order.

Activate / Deactivate Workflow Rule

Toggle the status of a workflow rule On or Off to activate or deactivate it, respectively.

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