



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.

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**.

WHEN This rule will be executed
When a project **is Created** ▾
+ Add Row

CONDITION 1

Criteria ✎ 🗑️
Owner **Is Navya Nune**
AND Status **Is Active**
+ Add Action

Update Field
Strict Project : Enabled Status : In Progress

CONDITION 2

Criteria ✎ 🗑️
Owner **Is Navya Nune**
AND Status **Is On Hold**
+ Add Action

Update Field
Strict Project : Disabled

Save Rule Cancel Execute the next workflow 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.

Name	Execute On	Execute Next Rule	Status
UP Update project status to Com... Project Details	Update	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BA Bill Actual Hours All Layouts	Update	<input checked="" type="checkbox"/>	<input type="checkbox"/>
US Update Status when Archived All Layouts	Archive	<input type="checkbox"/>	<input type="checkbox"/>
SA STATUS ALERT All Layouts	Creation, Update	<input checked="" type="checkbox"/>	<input type="checkbox"/>
US Update Status when Unarchived All Layouts	Unarchive	<input checked="" type="checkbox"/>	<input type="checkbox"/>
EA EMAIL ALERTS FOR EVERY TR... All Layouts	Creation, Updat...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PI PID All Layouts	Creation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PU Priority Update All Layouts	Creation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

More Reads

[Back to help](#)

[Public Projects](#)

[Project Dashboard](#)

[Project Custom View](#)

[Projects List View](#)