

WORKFLOW ACTIONS

After defining statuses, the administrator needs to define the actions that will change the **quote/order status**. For example, a desired behavior may be able to change quote status from Open to Quoted if a user clicks on the Generate Quote button.

There are three states:

My Quote – (available for all users)

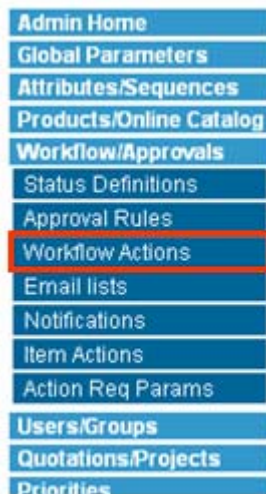
My Quote is the Quote that the currently logged in user created.

Waiting for approval – (This is only seen by the user who is an **Approve Parent** for other users). These are the Quotes of other users and the currently logged in user is their approve parent. They have the option to:

- Approve Quote
- Reject Quote
- Forward Quote

When Forward Quote is chosen, the quote is forwarded to their Approve Parent. This is the case when the value of the quote is higher than their approval amount.

Other Quotes - (these are not seen by all users, these are seen by only users chosen to see Quotes of other users) – these are Quotes of other users that are currently logged in, who the user is authorized to see.



The relationships between statuses and actions are specified thru the **Workflow Actions** section of WebSource administration which is shown in Figure 9-1. This section is invoked by clicking on the **Workflow Actions** link under **Workflow/Approvals** drop down.

The left side of the table contains **Pre-Action Statuses** and the top of the table contains **Post-Action Statuses**. The list of actions in each square, specify which actions will change the status listed all the way on the left side to the status listed all the way on the top. For example, if a user clicks on Generate Quote while the quote is Open, the quote status will be changed to Quoted. Also, if a user clicks on Place Order button while in the status Quoted, the status will be changed to Order Placed. Refer to Figure 9-1.

Note: Statuses can be added or removed through **Status Definitions** (see Chapter 8).

Status	Open	Order Placed	Order Shipped	Quoted	Quote won	Quote lost	Received Order	Need to place order	Archived	Revision
Open	View, Delete, Edit, Add Item	[?]	[?]	Generate Quote	[?]	[?]	[?]	[?]	[?]	[?]
Order Placed	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]
Order Shipped	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]
Quoted	[?]	Place Order	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]
Quote won	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]
Quote lost	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]
Received Order	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]
Need to place order	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]
Archived	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]
Revision	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]	[?]

Figure 9-1 – Workflow Actions

Status relations can be defined, not only for User's own Quotes (**My Quotes**), but for Quotes assigned to the user for approval (**Waiting for approval**), and for **Other Quotes** (this is not seen by all users, this is seen only by users chosen to see Quotes of other users) – these are Quotes of other users that are currently logged. Switching between **My Quotes**, **Waiting for Approval** and **Other Quotes** areas is allowed using dropdown at the top left corner of the table as shown in Figure 9-2. Consequently, Status relationships can be defined for any one or all three from this screen.

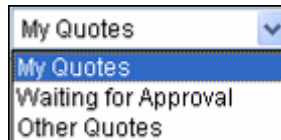


Figure 9-2 – Three Status Areas

The screen is divided into two areas, the **Workflow Actions Table** (top half) and the **User Group Rights List** (bottom half). So, in addition to specifying which actions are available for each status and which status will result from a certain action, this page is also used to define which user group can perform each action. The example shown in Figure 9-3 indicates that user group **Customer** and **Sales Rep** can perform the action **View**, **Delete**, **Edit**, and **Add Item**.

To change the rights associated with a group, click the [?] link next to the action. If a group(s) has been given rights already to an action, then click the link next to the action to change or add groups. This will bring up the **User Groups Rights** definition screen as shown in Figure 9-4.

To give a group rights to perform that action, click the group and click **Save**. To give multiple groups rights to perform that action, hold down the **Ctrl** key and select the desired groups. Groups can be added or removed from through **User Groups** (see Chapter 54).

User Groups Rights	
View	SALES REP.,CUSTOMER
Delete	SALES REP.,CUSTOMER
Archive	[?]
Copy	[?]
Order Copy	[?]
Reassign	[?]
Quote Won	[?]
Quote Lost	[?]
Quote Shipped	[?]
Place Order	[?]
CheckOut	[?]
Change Status	[?]
Edit	SALES REP.,CUSTOMER
New Revision	[?]
Set Active	[?]
Add Item	SALES REP.,CUSTOMER
Calculate Multiplier	[?]
Calculate	[?]
Save Quote	[?]
Generate Quote	[?]
Submit for Approval	[?]
Approve Quote	[?]
Reject Quote	[?]
Submit BOM	[?]
Save To Phone Log	[?]
Calculate Discount	[?]
History	[?]

Figure 9-3 – User Groups Rights



Figure 9-4 – User Groups Rights Definition

The process of specifying an action is performed by clicking the square that intersects between the **Start Status** and the **End Status** (see figure 9-1). After this is done a screen that looks similar to Figure 9-5 is displayed. For this example, the intersected square between Quote Won and Order Placed was clicked. At the top of the page the **Start Status** is given and the **End Status** is given.

Next, select the actions that will generate the change. Next to the actions are buttons that will allow further tailoring. The following are available for each action:

- **Automatic Configuration** - If items in the quote need to be reconfigured (be configured using the current product rules and prices instead of the rules and prices as it were when the quote was generated), then this check box should be selected for the corresponding action.
- **Perform On** – Will either be **Cart** or **Cart Item**. Cart Item actions are generally action buttons, while Cart actions are generally actions performed on the quote, or cart, itself.
- **Condition** – Allows a check to be performed to determine whether or not the action will be available.
- **Notification** – Gives the ability to send out email notifications when the action is performed.
- **PreAction/PostAction** – Special commands or calculations can be done before or after the action is completed.

Note: None of these options are available unless the action check box has been selected.

Order Status Actions							
Start Status:	Quote won		End Status:	Order Placed			
Action name	Selected	Automatic Reconfigure	Perform on	Condition	Notifications	PreActions	PostAction
View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Archive	<input type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Order Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Reassign	<input type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Quote Won	<input type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Quote Lost	<input type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Quote Shipped	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Place Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cart Item	Check	Edit	Edit	Edit
CheckOut	<input type="checkbox"/>	<input type="checkbox"/>	Cart Item	Check	Edit	Edit	Edit
Change Status	<input type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Edit	<input type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
New Revision	<input type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Set Active	<input type="checkbox"/>	<input type="checkbox"/>	Cart	Check	Edit	Edit	Edit
Add Item	<input type="checkbox"/>	<input type="checkbox"/>	Cart Item	Check	Edit	Edit	Edit
Calculate Multiplier	<input type="checkbox"/>	<input type="checkbox"/>	Cart Item	Check	Edit	Edit	Edit

Figure 9-5 Order Status Actions