**THE WORKFLOW**

The GoFormz Workflow tab enables you to control how data passes between GoFormz and Procore. You can set up the configurations, as well as view the jobs as they run and progress through each step. Two example workflows are provided in your GoFormz Sandbox environment to demonstrate this. The first Workflow shows data going from GoFormz to Procore, the second workflow gets data from Procore to GoFormz.

Understanding the Workflow:

1. **GOFORMZ TO PROCORE**

   This workflow attaches a PDF copy of your completed GoFormz form to a specific record in Procore, as well as changing Project data and creating objects.
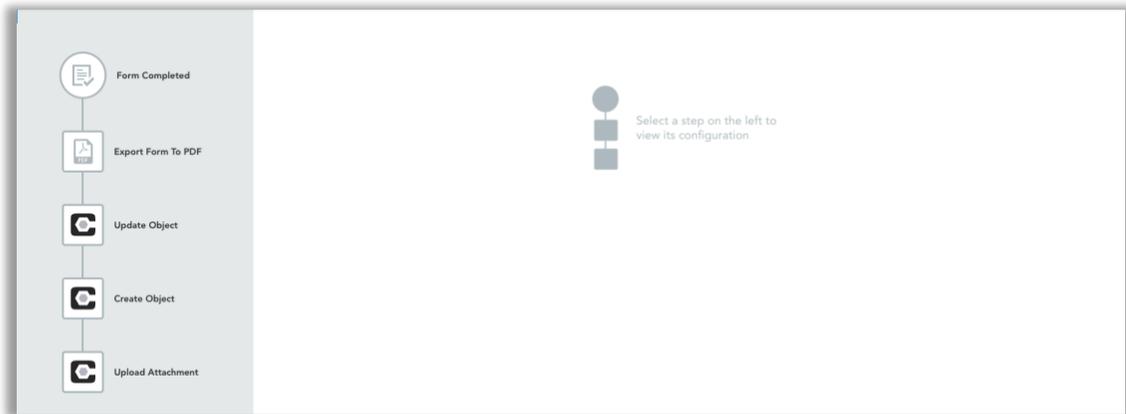
   Workflows run in parallel, each step must be completed before the next step can run. You can view the specific details of each step by clicking on it. Different steps have different input requirements. The first step is always the **Trigger Event**. This is what starts the workflow. When getting data from GoFormz to another system, the workflow is set off by the completion of a form.

   1.1. **Form Completed**
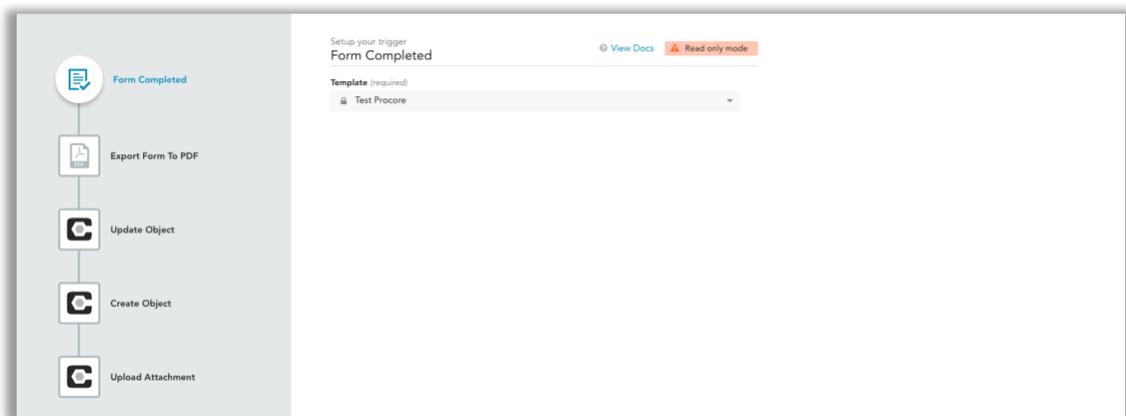
Workflows are set up per template. When setting up the Trigger event of a form being completed, you must designate which template will be connected to the workflow (therefore connecting all forms to that workflow).

1.2. **Export Form to PDF**
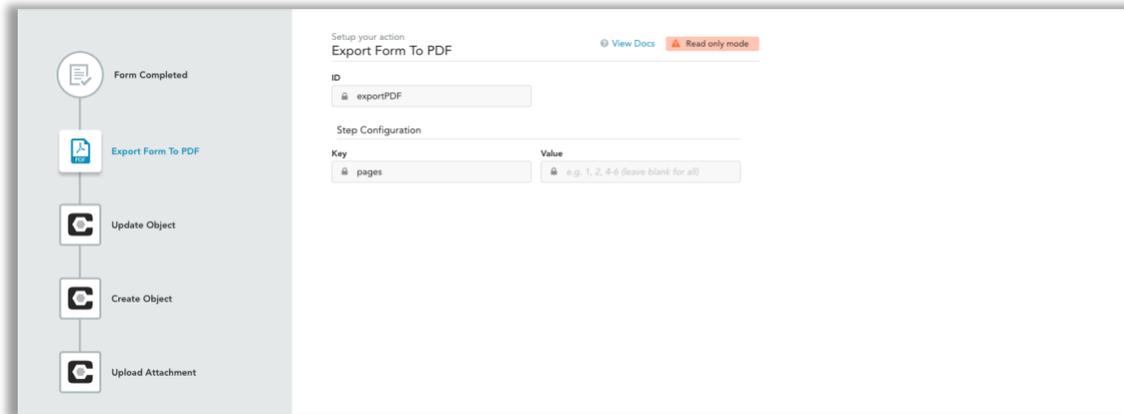
When a form is completed, it is not automatically rendered as a PDF. When attaching forms to a record, you must add a step to export that form as a PDF file. This step allows you to designate certain pages, or to export the entire form.

1.3. **Update Object**
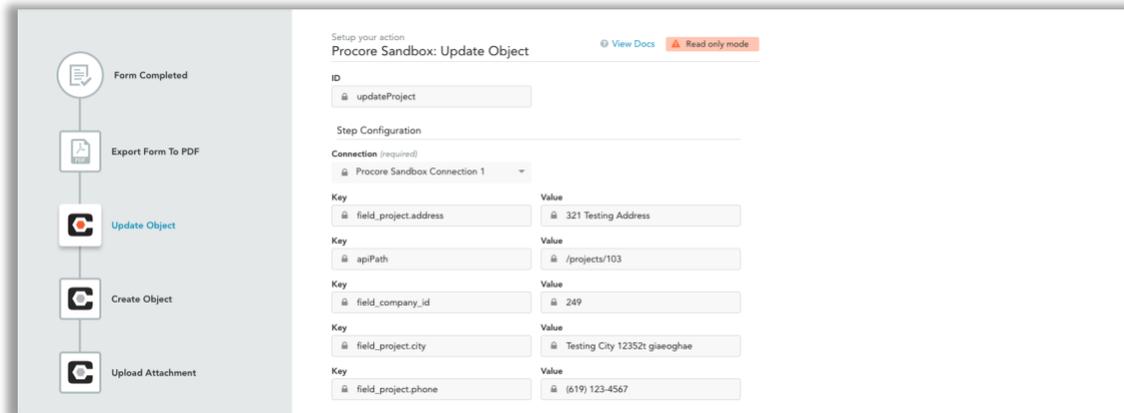
You can update a Procore record with information from the form that was just completed. The $field\_$ Key inputs are fields in the Procore record that can changed. Their corresponding $Value$ is information pulled from the form. When updating a record in Procore, the system must know which specific record to update. This is done by finding the ID and $API\ Path$ of that record. These two values make sure a specific record is being updated, and not just and record that happens to match a company name. This specific step is updating project information for an existing project record.

1.4. Create Object

Just as you can update a record in Procore, you can create a new one if that record does not exist. In this case, the workflow will create a new observation for a specific project. The `Project ID` and `API Path` specify which project, while the `Observation Type ID` is a system given ID to separate the different observation types.

1.5. Upload Attachment

Now that the observation record has been created for a project, you can attach a PDF file to that newly created observation record. This is why it is important to remember the path of a workflow; the export PDF step must be done before a PDF file can be uploaded to a record. That record must first exist or be created before an attachment can be uploaded. Workflow steps can utilize the outputs of previous workflow steps. Here, we are attaching the PDF of the GoFormz form to the new observation record. Now your workflow has been completed!

2. **PROCORE TO GOFORMZ**

   When sending data from one system to GoFormz, a webhook is used to start the workflow.