

Custom Workflows Tutorial

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Why Custom Workflows?

Every team works differently. Custom workflows let you define states that match your process. Examples: 'Code Review', 'QA Testing', 'Deployed to Staging'.

Creating a Workflow

1. Navigate to Settings → Workflows
2. Click 'New Workflow'
3. Add states (drag to reorder)
4. Define allowed transitions
5. Assign the workflow to projects

Example: Software Development Workflow

States: Backlog → In Development → Code Review → QA Testing → Staging → Production

Transition rules:

- Tasks must pass Code Review before QA
- Only QA team can move to Production
- Require PR link before Code Review

State Automation

Trigger actions when tasks enter specific states:

- Auto-assign to QA team when entering 'QA Testing'
- Send Slack notification when deployed
- Create checklist when task starts