

H&J Petroleum

CASE STUDY

FORMS AND WORKFLOWS

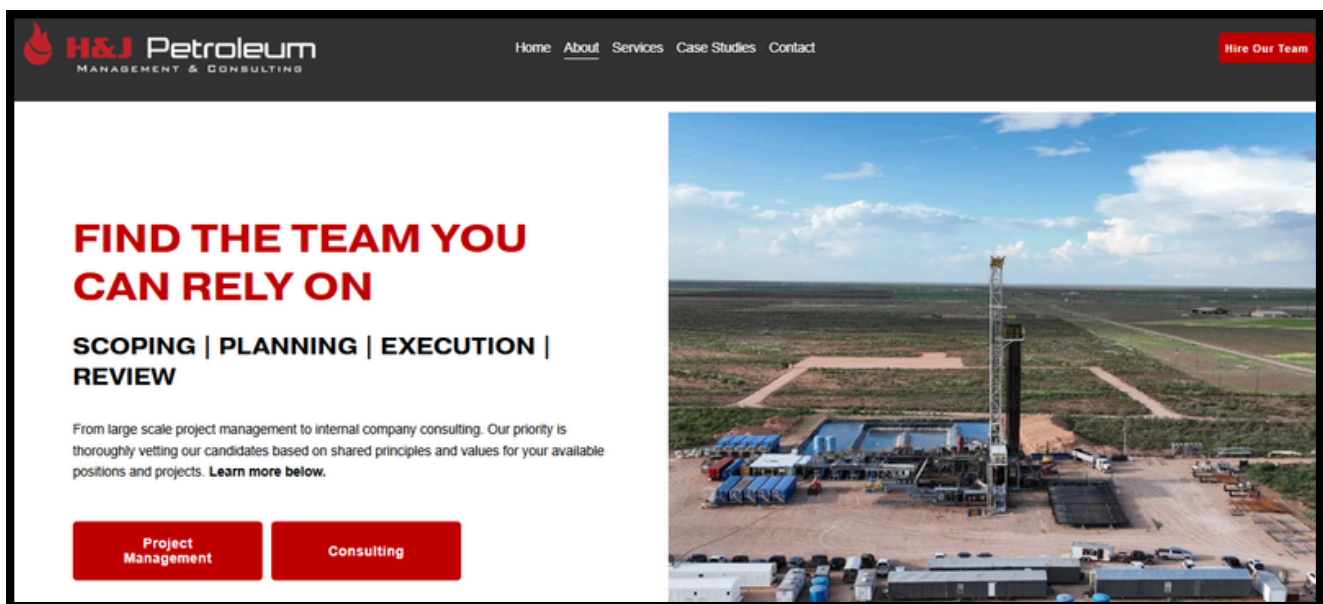


WORKFLOW

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webguruz.in

About H&J Petroleum

H&J Petroleum delivers trusted, high-performance energy-sector services across the Delaware Basin and beyond. With a strong focus on well-site supervision, drilling operations, and comprehensive project and personnel management, we bring precision, safety, and efficiency to every job.

The image is a screenshot of the H&J Petroleum website. The header features the company logo on the left, a navigation menu with links for Home, About, Services, Case Studies, and Contact in the center, and a red 'Hire Our Team' button on the right. The main content area is split into two columns. The left column has a white background with the heading 'FIND THE TEAM YOU CAN RELY ON' in bold red text. Below this is a list of services: 'SCOPING | PLANNING | EXECUTION | REVIEW'. A paragraph of text follows, stating the company's commitment to vetting candidates and values, with a link to 'Learn more below.' At the bottom of this column are two red buttons labeled 'Project Management' and 'Consulting'. The right column features a large aerial photograph of an oil drilling site with a tall derrick and various equipment on a flat, open landscape under a blue sky with scattered clouds.

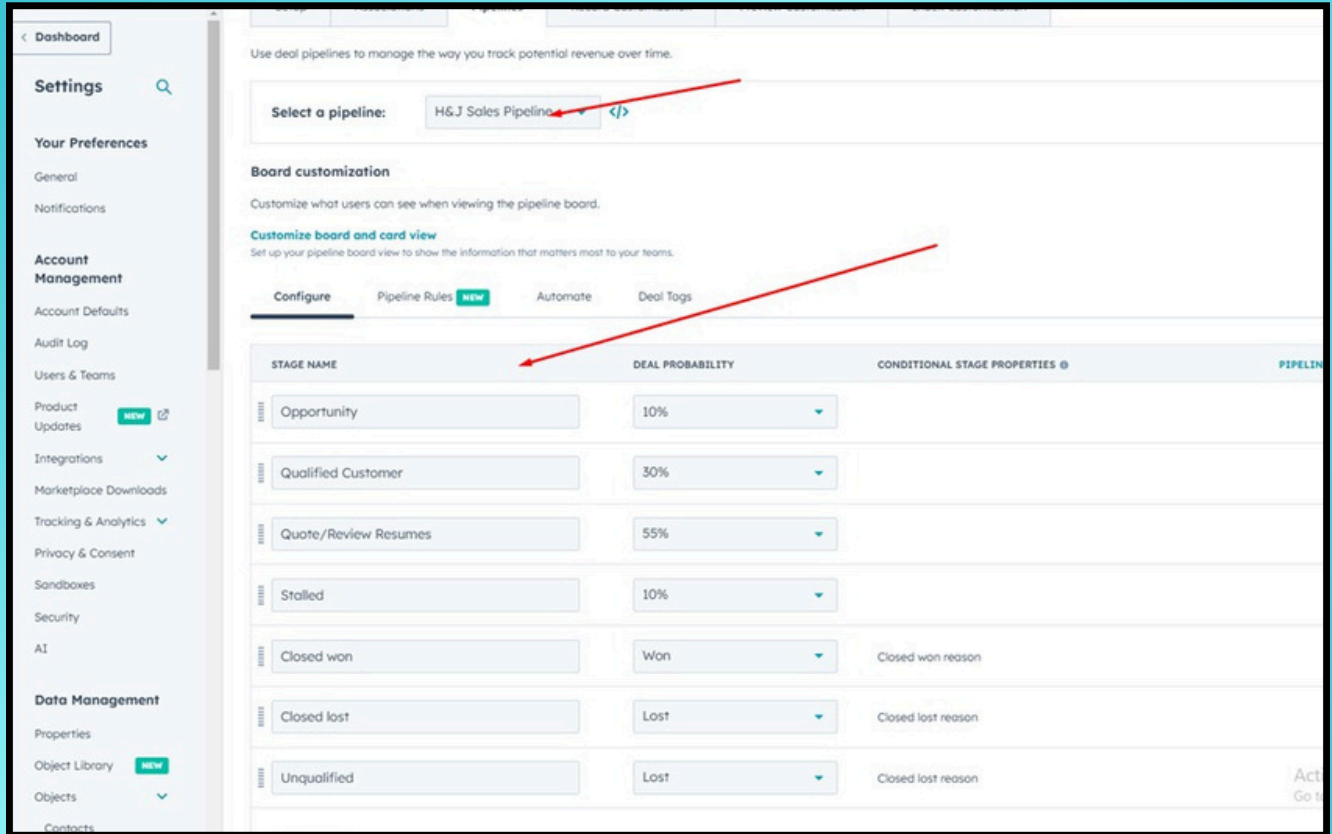
Backed by more than 40 years of combined drilling and geological experience, our team understands the challenges of the field and the importance of getting it right the first time. We partner closely with operators to optimize results, reduce risks, and keep projects on track. At H&J Petroleum, we're committed to excellence—driven by expertise, integrity, and a deep dedication to the energy industry.

H&J - User Guide Brief About Forms and Workflows

S.no	H&J Pipeline
1	H&J Sales Pipeline
2	H&J Recruiting Pipeline

S.no	H&J Forms
1	Join Our Team HS
2	H&J Ignite form to previous attendees (direct email)
3	H&J Ignite RSVP/Payment February 2025 (SquareSpace)
4	H&J Consultant Pipeline - Screener Form
5	H&J Consultant Emergency Contact Form
6	H&J Ignite form for future events (SquareSpace)
7	H&J Marketing Coordinator - Form 2
8	H&J - 1099 Internal Application
9	Scope of Work - Update/Delete
10	Scope of Work - Request for Approval
11	Scope of Work - Approval
12	Notify Consultant
13	Insert Line Items
14	Delete Timesheet
15	Customer Approval Response - Main Form

16	Customer Approval Response - Create Bill for Consultant PDF
17	Well Control - Consultant Compliance Record
18	Customer Approval Response - Create Approved Field Ticket PDF
19	Consultant Approval Request
20	Consultant Re-Approval Request
21	H&J Approval Response - Create Bill for Consultant PDF
22	H&J Consultant Government ID Upload (Not in Use)
23	Create and Associate Well
24	Prepare Consultants
25	Associate Existing Wells
26	Assign and Associate Consultant to Sales Deal
27	Consultant Fun Facts - Appreciation
28	H&J devo sign up form
29	H&J Consultant Availability (Not in Use)
30	Consultant - Reference Request Update
31	H&J - General Internal Application
32	Update Timesheet
33	HJ Approval Response (Not in Use)
34	H&J Ignite Survey (Not in Use)
35	Check References Form 2
36	H&J Ignite RSVP- September 2024
37	H&J - HR and Marketing Coordinator Application
38	H&J Approval Response (Not in Use)
39	Your H&J Story (Revision)
40	Your H&J Story



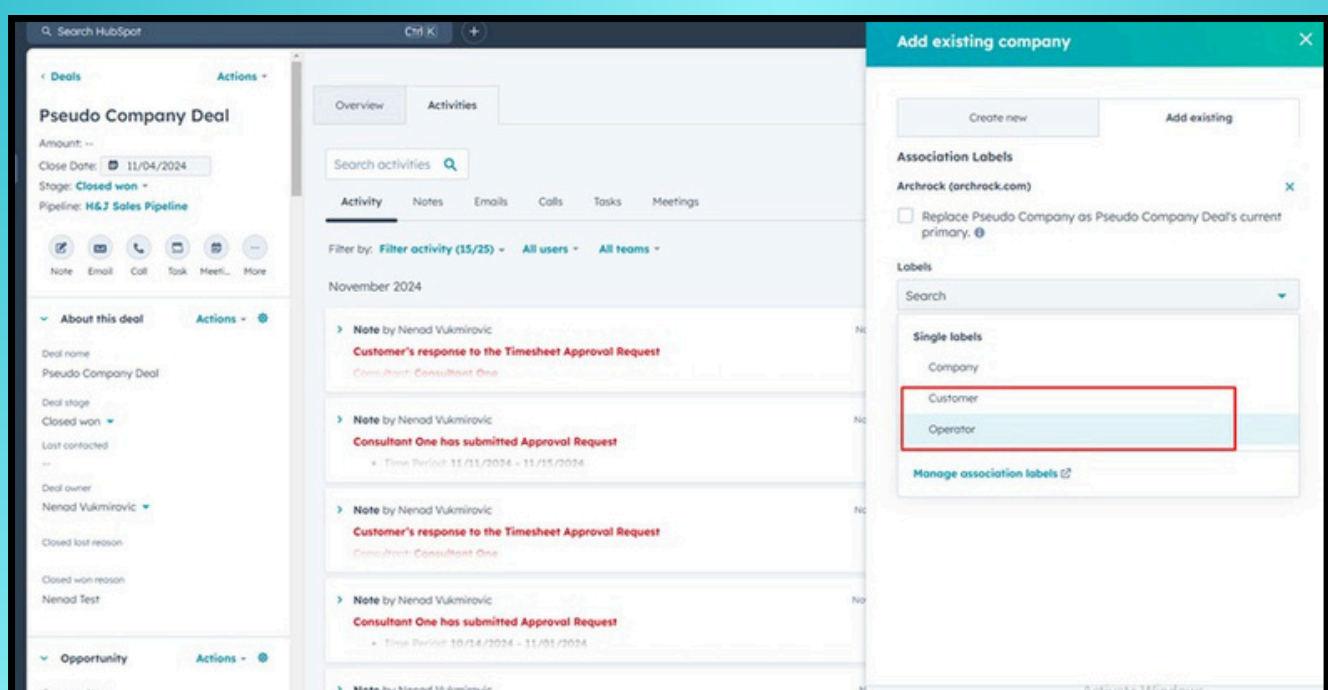
Pipeline Name: H&J Sales Pipeline

Pipeline Stages:

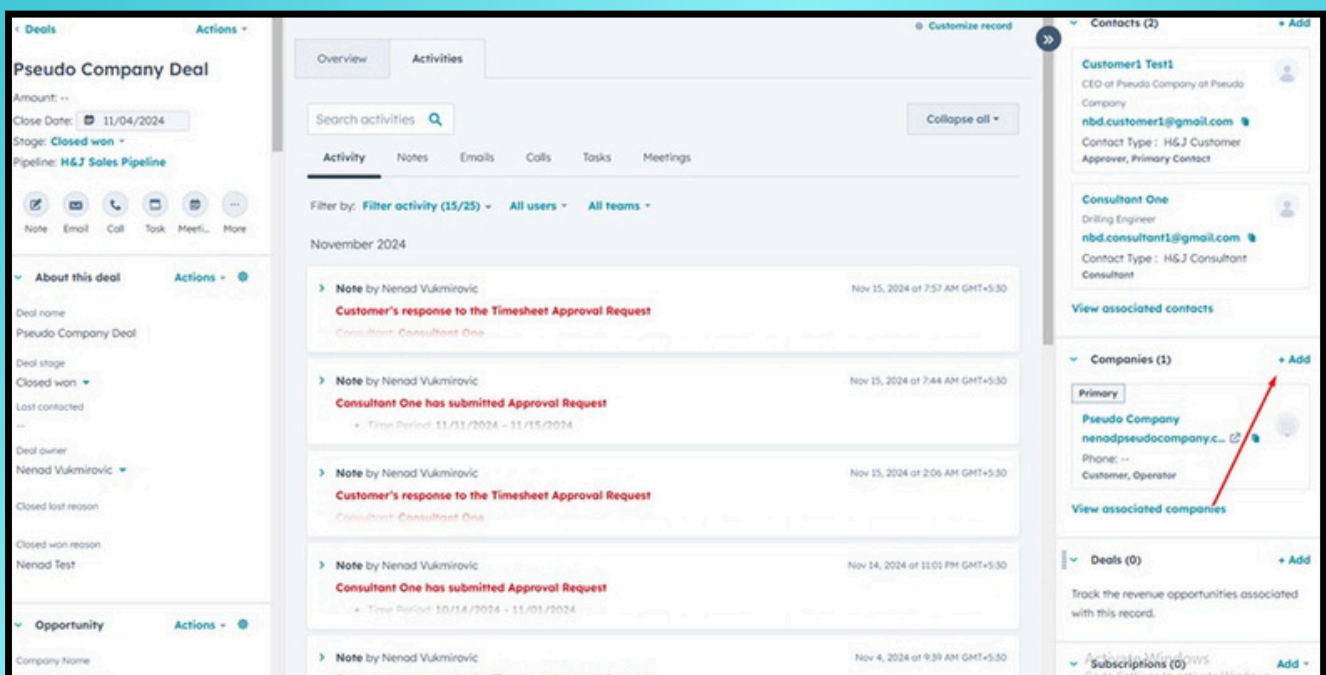
- Opportunity Qualified
- Customer
- Quote/Review
- Resumes Stalled
- Closed won Closed
- Lost Unqualified

1. The owner manually creates a deal in the Opportunity stage of the H&J Sales Pipeline.
2. Before the deal progresses to the Quote/Review Resumes or Close Won stages:
 - a. Ensure the deal is still in the Opportunity or Qualified Customer stages.
 - b. Associate the deal with the following:
 - A Customer
 - An Operator
 - A Primary Contact
 - An Approver
3. Verify that the associated Customer has selected MSA Terms at the company object level. (manually updated by owner)

When we associate company with deal we have mainly two association label



1. Both the Customer and Operator are represented as Company records.
2. A single Company can be designated as both the Customer and Operator at the same time, or the Customer and Operator can be two separate Companies.
 - a. Navigate to the Companies card on the right-hand side of the Deal record.
 - b. Click on "+Add" to associate the desired Company.
4. Ensure that the Company label is updated before the Deal progresses to the next stage.



Associate a Primary Contact and an Approver:

A. A Contact can be associated with a Deal as an Approver, Consultant, or Primary Contact.

B. Important: Do not manually assign the Consultant label. This label is automatically assigned through automation (06. Associate Consultant to a New Sales Deal) (in this workflow we used a form on this form submission to create a contact as consultant and associate with deal) related to H&J Recruiting and should never be manually added to a Sales Deal.

C.The Primary Contact is the individual associated with the Customer:

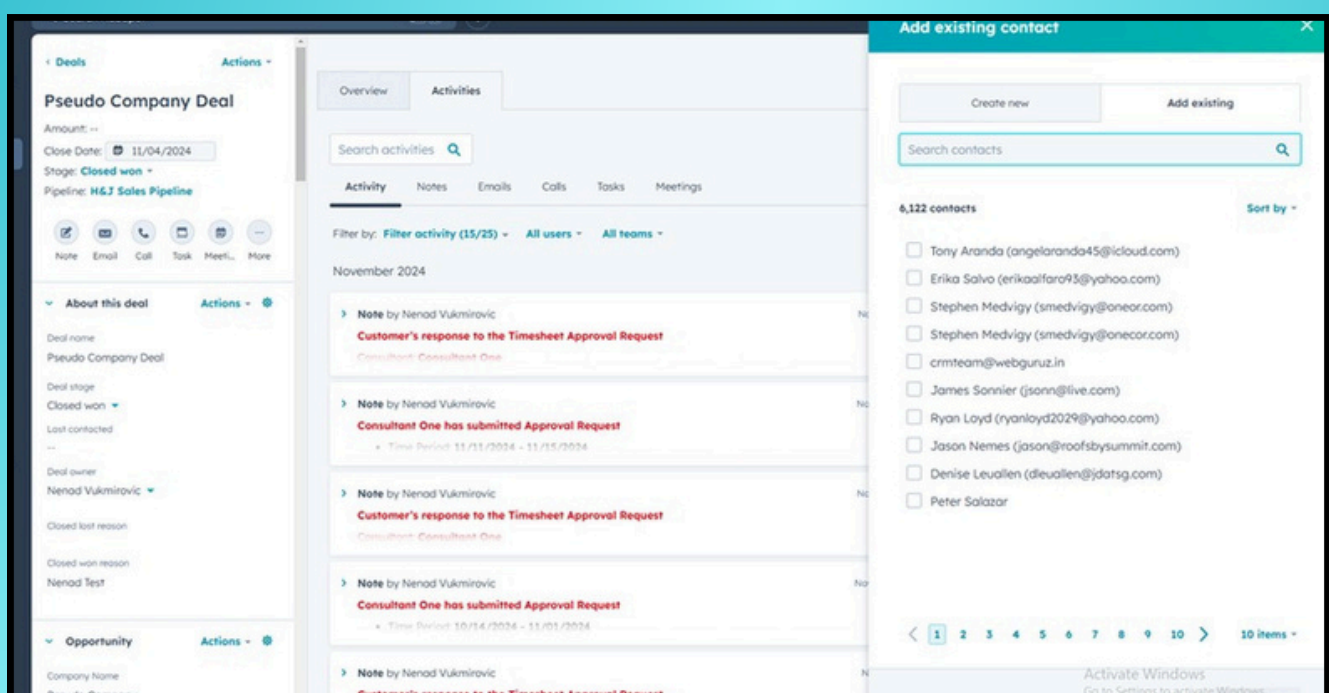
- i. Invoices will be sent to the Primary Contact.
- ii. Approved Timesheets will also be sent to the Primary Contact, but only if they also serve as the Approver.

D. The Approver is responsible for approving Timesheets or Field Tickets:

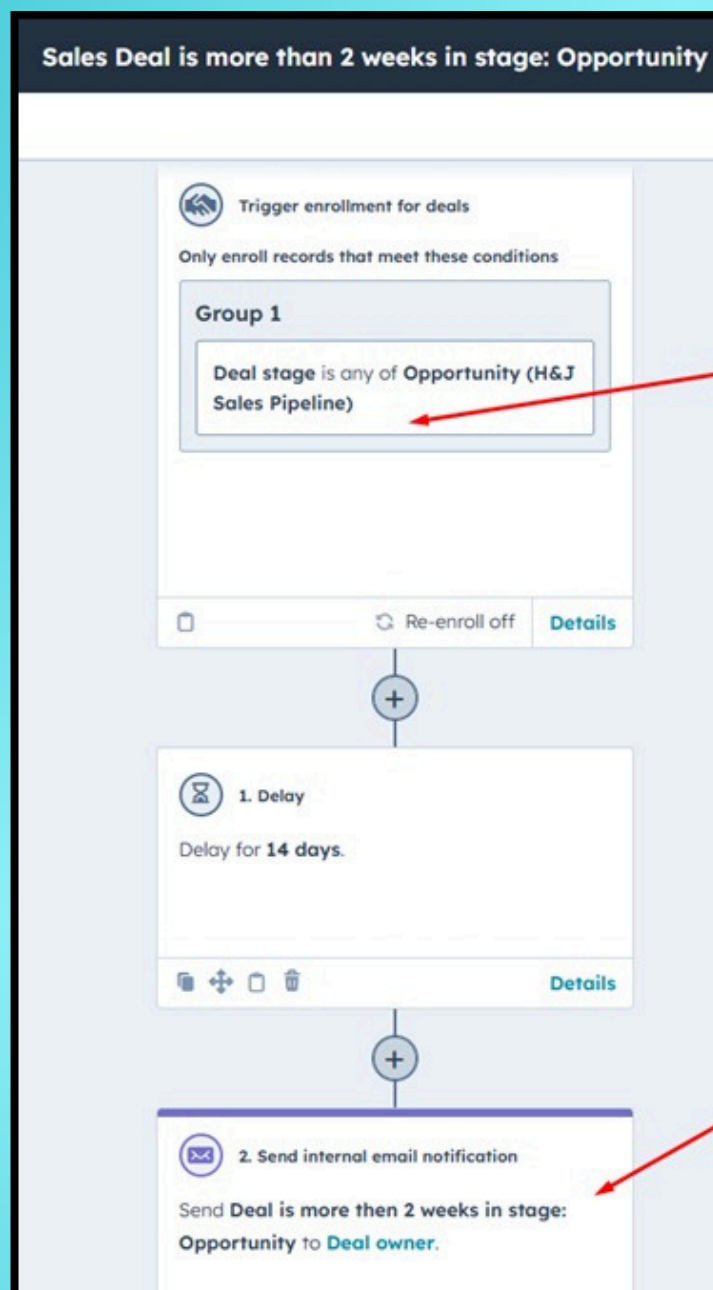
- If the Approver is not an H&J Petrol contact, they must be marked as a Marketing contact.
- If the Approver is an H&J Petrol contact, the "H&J Employee" property (on the contact object) must be set to "YES," and a HubSpot user account must be created.
- Approved Timesheets will be sent to the Approver with pricing details for the Customer, as well as to the Consultant with pricing details for the Consultant.

E. A Contact can be designated as both the Primary Contact and the Approver simultaneously.

- To associate a Contact with a Deal, navigate to the Contacts card on the right side of the screen.
- Click "+Add" and select the Contact to associate.



After associating the necessary contacts and creating the deal, set up a workflow (Sales Deal is more than 2 weeks in stage: Opportunity) to monitor its progress. If a Sales Deal remains in the "Opportunity" stage for more than two weeks, an internal email should be automatically sent to the owner. but the workflow is off.



Invoice Information Section: (updated by workflow)

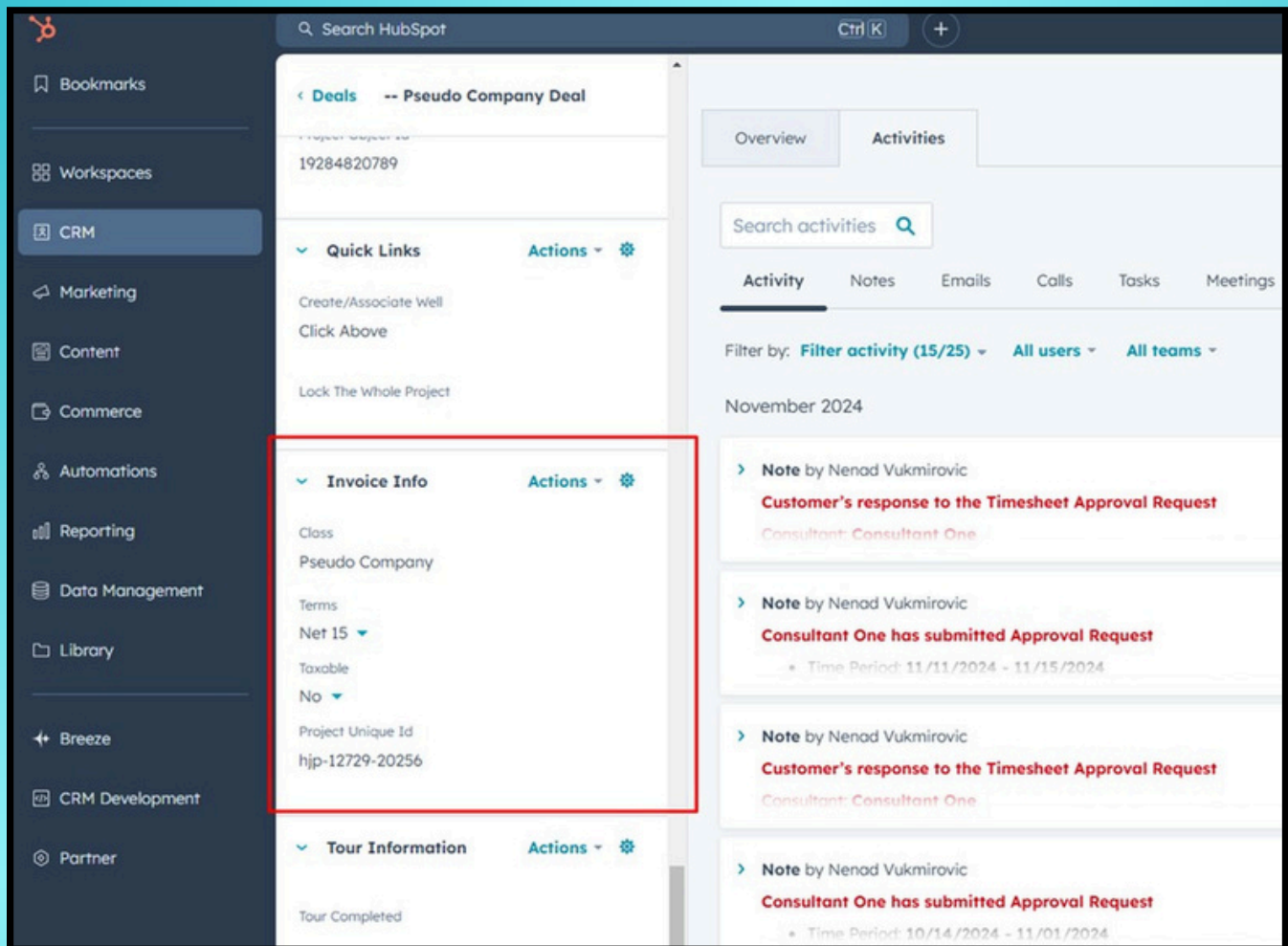
1) The "Invoice Info" section is located on the left side of the Sales Deal record.

a. Terms: The "Terms" field in the Sales Deal will be automatically populated using the value from the associated Customer's "MSA Terms" property on the company object level.

b. Taxable: The "Taxable" field in the Sales Deal is automatically set to "No." If it needs to be changed to "Yes," this must be done before the Sales Deal progresses to the "Quote/Review Resumes" or "Close Won" stages.

c. Class: The "Class" field represents the Customer's company name and is automatically populated in the Sales Deal. This field is essential for importing Timesheets into QuickBooks.

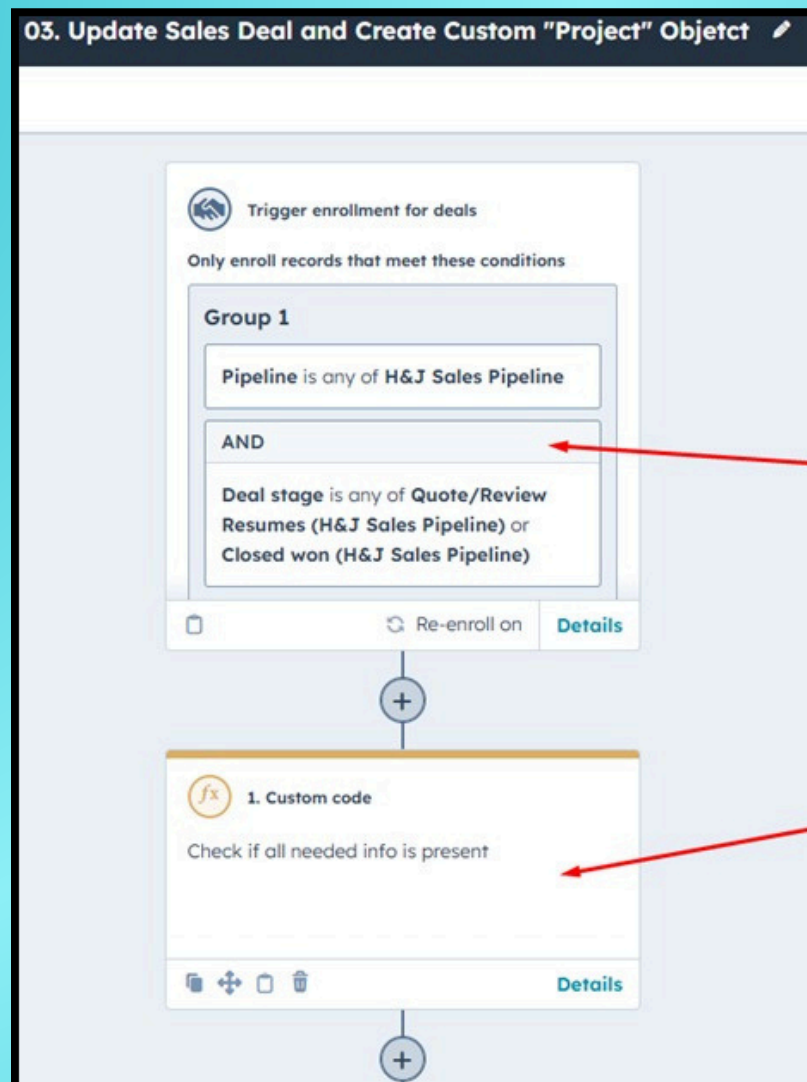
2) Update MSA Terms Property: Ensure the "MSA Terms" property is updated on the associated Company record labeled as the Customer.



Sales Deal is moved to the Quote/Review Resumes or Closed Won

Critical Note: (For this flow we have using a workflow [1] to set deal deal error) If a Sales Deal is moved to the "Quote/Review Resumes" or "Closed Won" stage without the essential information required for Timesheets automation, the Deal will automatically revert to its initial stage. Additionally, a "DEAL ERROR" note will be created and associated with the Sales Deal. Once all listed errors are corrected, you can move the Deal back to the "Quote/Review Resumes" or "Closed Won" stage.

Workflow Name: Update Sales Deal and Create Custom "Project" Object When deal stage is Quote/Review Resumes" or "Closed Won in H&J Sales Pipeline

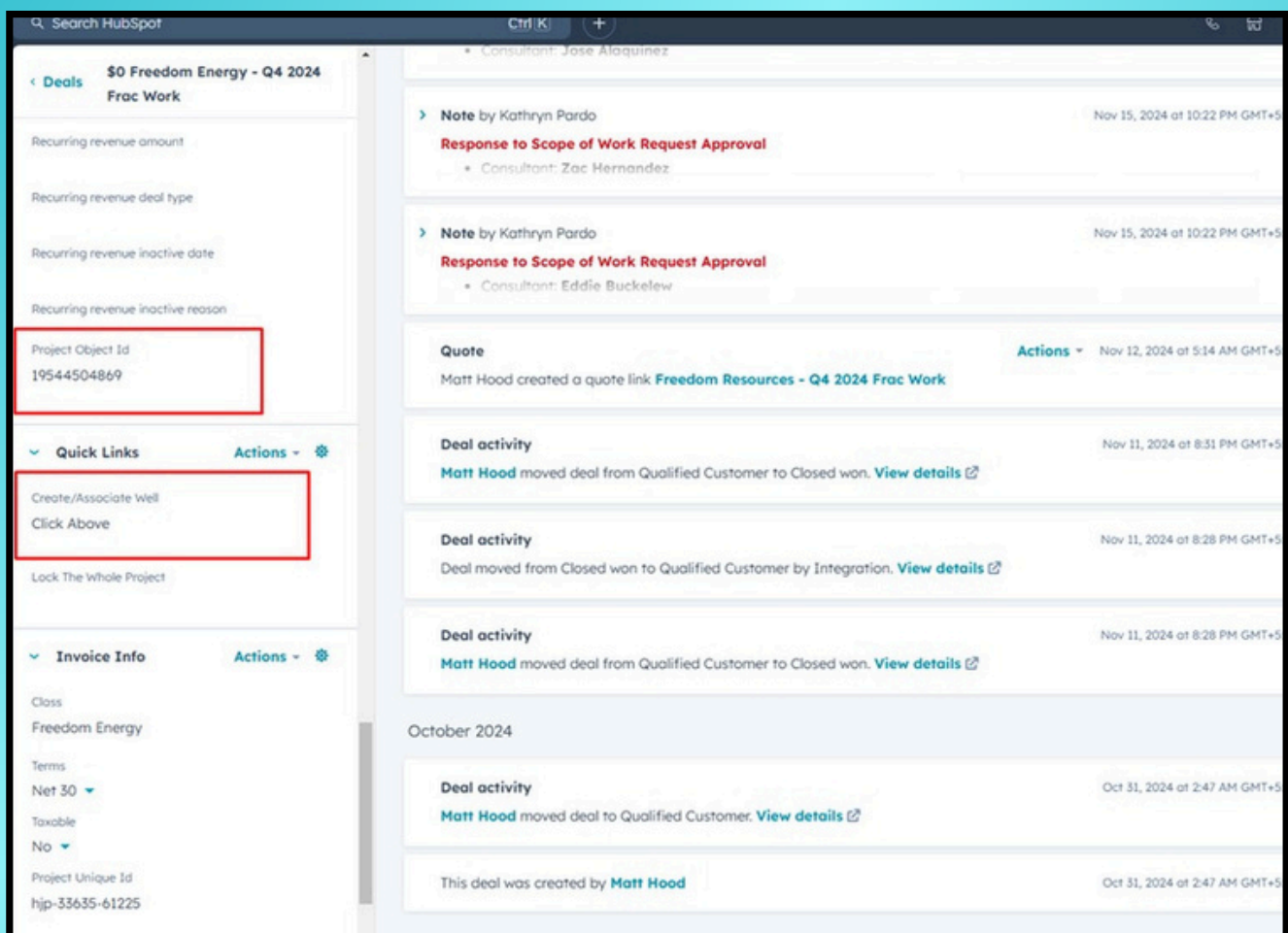


We are utilizing custom code in the above action to achieve the following:

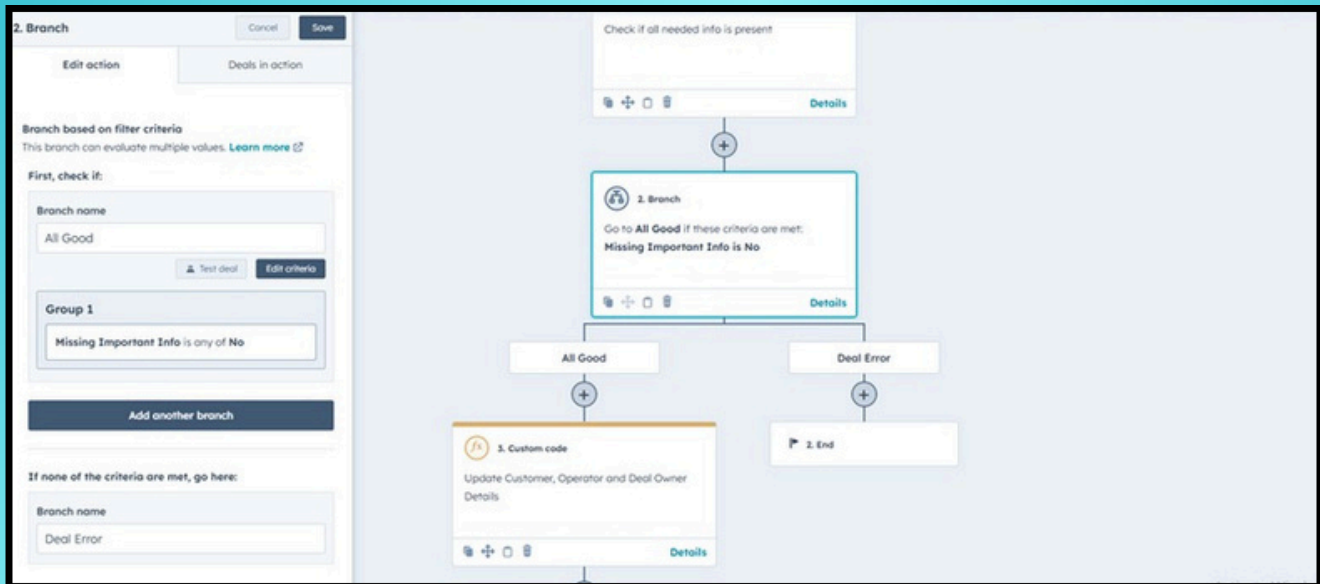
- Retrieve deal information.
- Fetch the Customer ID and Operator ID using association labels.
- Verify customer and operator terms.
- Check the deal owner.
- Identify any issues with consultants.
- Create a note linked to the enrolled deal.
- Update the deal property "Missing Important Info" to either "Yes" or "No" based on the findings.

Readiness Check:

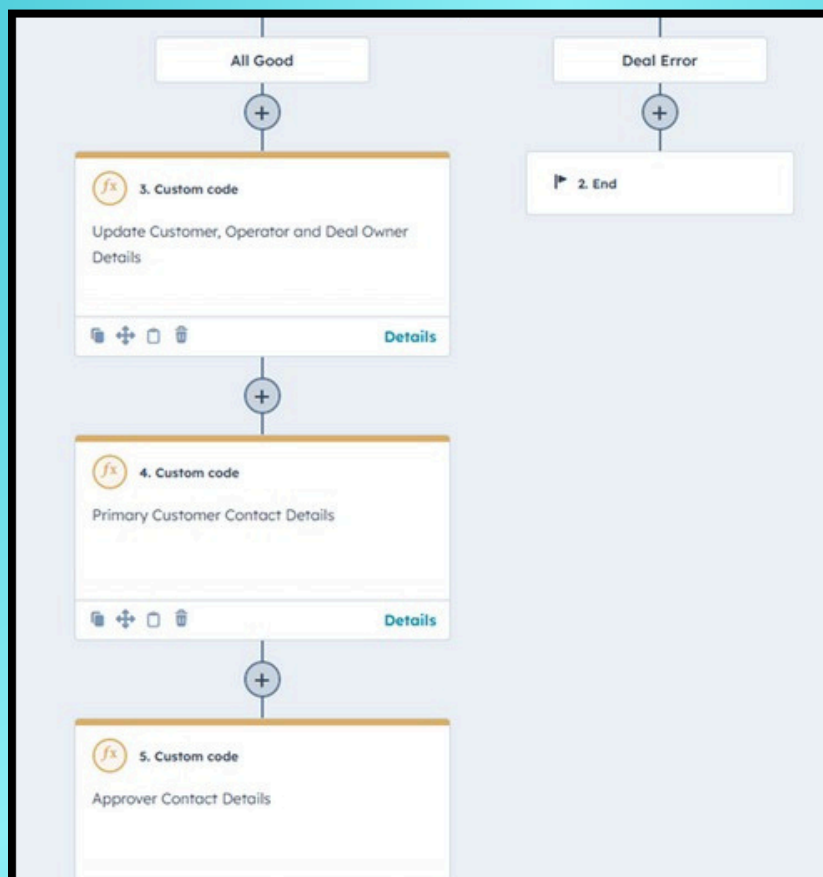
When moving a Sales Deal to the "Quote/Review Resumes" or "Closed Won" stage, ensure that the properties Project Object Id and Create/Associate Well [2] in the left-side panel are not blank. If these fields are populated, the Deal is ready for the next step.



After completing this process, we verify if the deal property "**Missing Deal Info**" is set to "**No**". If it is, everything is in order



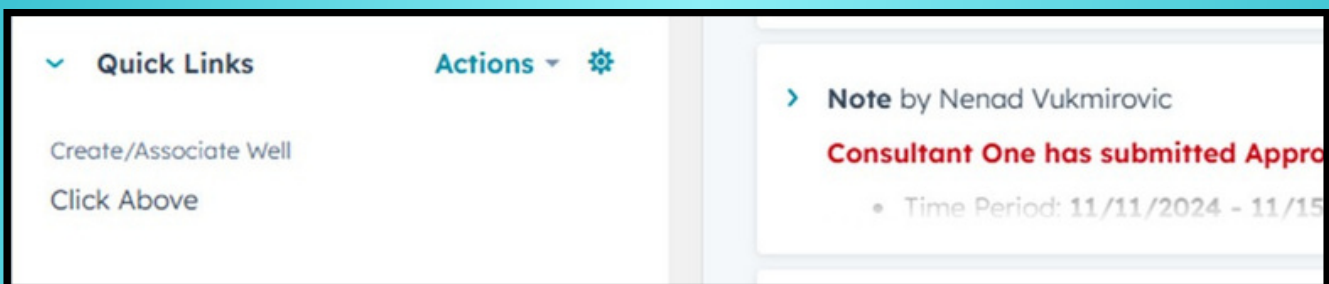
Then, we proceed to the next step by updating the deal properties under the Invoice Info group, retrieving the data from the company object level.



In the 3rd custom code action, we will:

Update Customer, Operator and Deal Owner Details

- Retrieve deal information.
- Fetch the Customer ID and Operator ID using association labels.
- Retrieve customer information and update it in the deal Properties.
- Retrieve operator information and update it in the deal.
- Fetch the deal owner's email.
- Obtain the deal owner's contact ID.
- Insert the "Create Well" link and update the deal owner information.

**After this process we will move to 4th action.**

Get Primary Customer Contact Details,

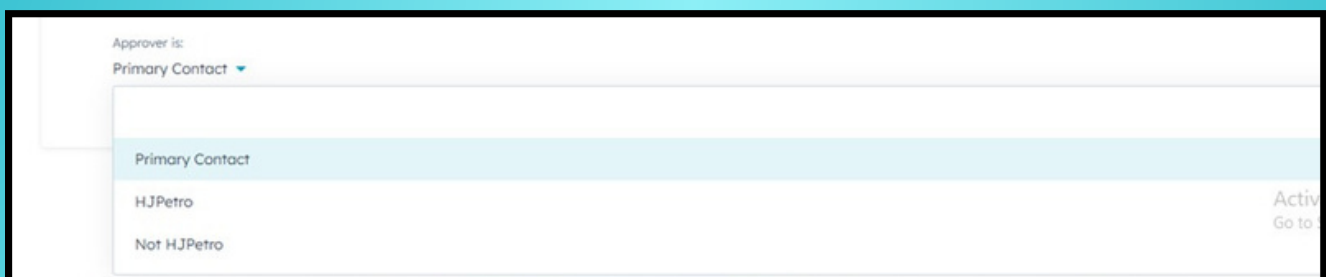
- Retrieve deal information.
- Fetch the Approver Contact ID using association labels.
- Check if there is no primary contact.
- If no primary contact exists, retrieve the approver contact.
- Update the approver contact information in the deal.

Updated properties

```
try {
  const ApiResponse3_3 = await hubspotDeal
    .apiRequest({
      method: 'PATCH',
      path: '/crm/v3/objects/deals/' + getDealId,
      body: {
        "properties": {
          "hj_primary_customer_contact_id": getAssociatedContactsLabelId,
          "hj_primary_customer_contact_name": getPrimaryContactName + " " + getPrimaryContactLastName,
          "hj_primary_contact_email": getPrimaryContactEmail,
          "hj_primary_contact_id": getPrimaryContactId
        }
      }
    });
} catch (err) {
  console.error(err);
  throw err;
}
```

After this process we will move to 5th action.

In this action, we will follow the same steps as the 4th action, with one difference: we will retrieve the Primary Contact ID updated in the 4th action and use it to update the Approver Is property.



The screenshot shows a form with a label 'Approver is:' and a dropdown menu. The dropdown menu is open, showing three options: 'Primary Contact' (which is highlighted in light blue), 'HJPetro', and 'Not HJPetro'. To the right of the dropdown menu, there is a button labeled 'Activ Go to'.

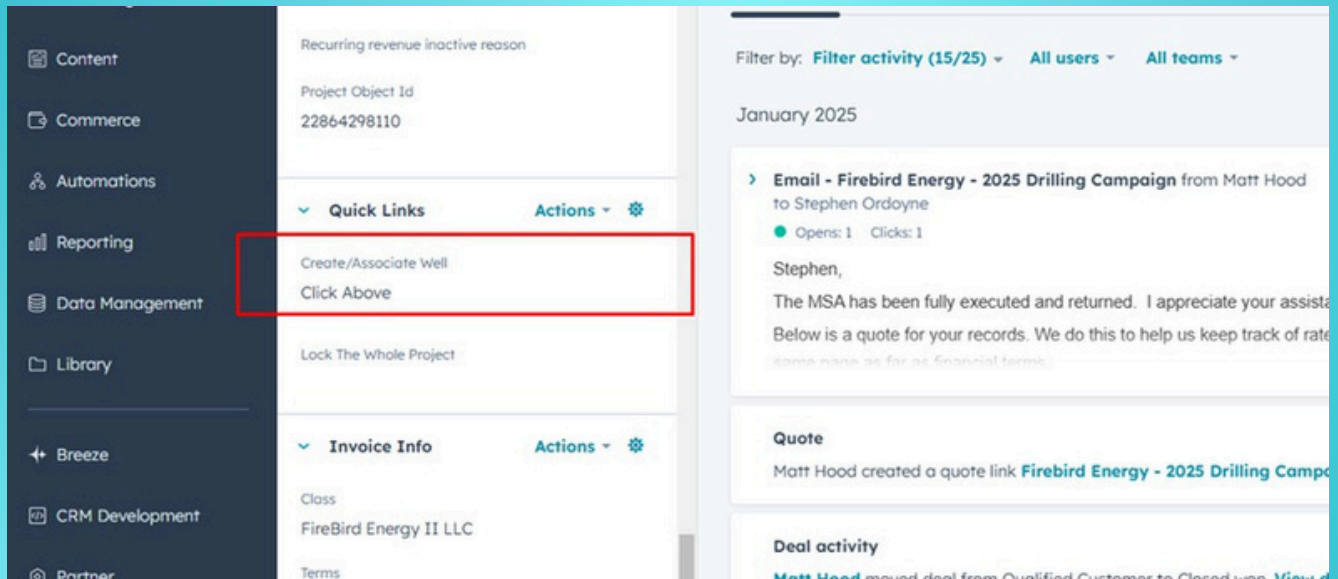
After this, in the final action, we create a Project (Custom Object) using the information retrieved from the deal.

Retrieve the deal property:

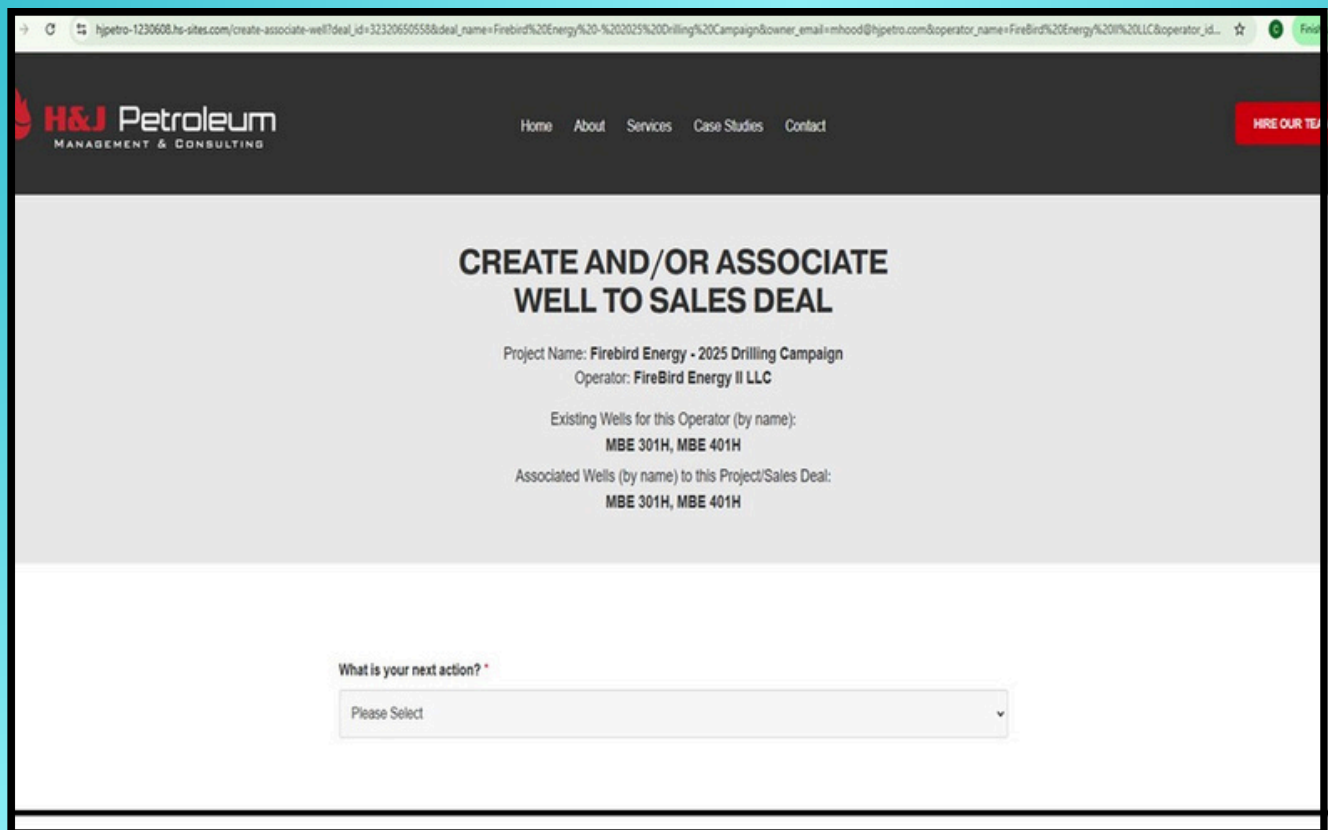
- dealname
- amount
- hs_object_id
- hj_customer_name
- hj_customer_id
- hj_operator_name
- hj_operator_id
- hubspot_owner_id
- owner_name
- owner_email
- owner_contact_id
- hj_primary_customer_contact_name
- hj_primary_contact_email
- hj_primary_customer_contact_id
- approver_full_name
- approver_contact_email
- approver_unique_id
- hj_approver_is
- project_object_id
- project_unique_id
- terms
- taxable
- Class

Process of HJ Wells [Custom Object] creation:

When updating the deal information using the previous workflow, add a value to the "Create/Associate Well" property.



When the user clicks the Well button, they are redirected to the H&J portal.



The deal_id, deal name, and deal owner and Operator name [company object level] are passed along in the portal URL.

hjetro-1230608.hs-sites.com/create-associate-well?deal_id=32320650558&deal_name=Firebird%20Energy%20-%202025%20Drilling%20Campaign&owner_email=mhood@hjetro.com&operator_name=FireBird%20Energy%20II%20LLC&operator_id...

H&J Petroleum
MANAGEMENT & CONSULTING

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CREATE AND/OR ASSOCIATE WELL TO SALES DEAL

Project Name: Firebird Energy - 2025 Drilling Campaign
Operator: FireBird Energy II LLC

Existing Wells for this Operator (by name):
MBE 301H, MBE 401H

Associated Wells (by name) to this Project/Sales Deal:
MBE 301H, MBE 401H

Form Name: Create and Associate Well

The URL includes an embedded form,

What is your next action? *

Create New Well

Well Name *

Is Well Active? *

Please Select

AFE *

API

CREATE NEW WELL

Activate
Go to Settings

When the user submits the form, an HJ Wells (custom object) is created.

Creating and Associating (For Associating we used a workflow) a Well

1. Complete the Well Creation Form

- If no existing Wells are found, the form for creating and associating a new Well will appear automatically.
- If existing Wells are available, you will be prompted with: "What is your next action?"

2. Choose an Action:

- Create New Well
- Associate Existing Well
- Back to Sales Deal

3. If "Associate Existing Well" is selected:

- Choose the desired Wells from the list.
- Click "Associate Selected Wells" to complete the process.

4. If "Create New Well" is selected:

- Enter the Well Name (required).
- Select "Is Well Active?" (required).
- Input AFE (required).
- Update the API (optional).
- Click "Create New Well" to finalize.

5. Repeat the process if needed:

If additional Wells are required for the same Sales Deal and Operator, a confirmation prompt will appear with "Yes" and "No" options.

The Well Is Created And Associated

Well Name: O&G #1 O&G #2 O&G #5 O&G #6

Well is Active: Yes Yes Yes Yes

Well Operator: Oil & Gas - Test Oil & Gas - Test Oil & Gas - Test Oil & Gas - Test

AFE: Oil & Gas Unit 10 Oil & Gas Unit 15 O&G Unit 55 Oil & Gas Unit 66-69

API: 123456 887755 999999 12346

Well is associated to Operator: Oil & Gas - Test

Well is Associated to Project/Sales Deal: Test - Oil Internal

**Create and/or associate Another Well
For The Same Project/Sales Deal And The Same Operator?**

YES

NO

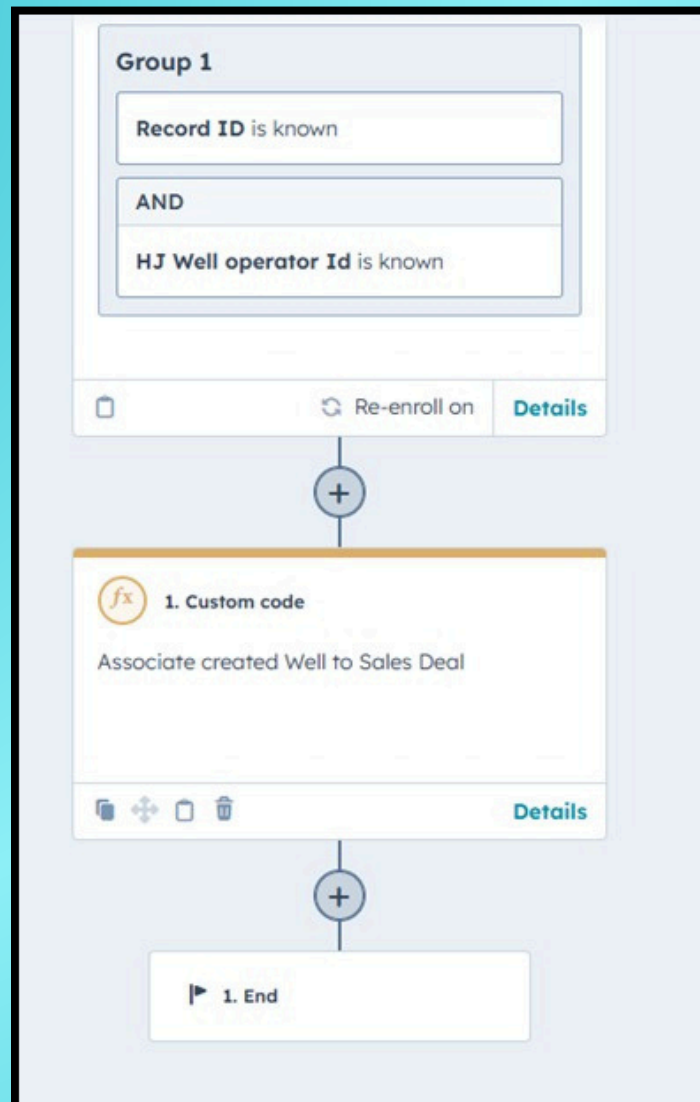
Once all Wells have been created or associated, review the Sales Deal to confirm that the associated Wells are displayed on the right side of the Sales Deal record.

Additionally, the Wells should also be visible on the right side of the Operator Company record.

For Associating We used a workflow

Workflow Name: 04. Associate Created Well to Sales Deal

Once the workflow is triggered with the Record ID or HJ Well Operator ID, the process continues with further actions, utilizing custom code for execution.



In custom code we will:

- GET WELL INFO – Retrieve Well details using the available Record ID or HJ Well Operator ID. CHECK IF ASSOCIATION TO OPERATOR EXISTS–
- Verify if the Well is already linked to the Operator.
- **ASSOCIATE THIS WELL TO OPERATOR** – If not associated, establish a connection between the Well and the Operator.
- **ASSOCIATE THIS WELL TO DEAL** – Link the Well to the relevant Sales Deal for proper tracking.

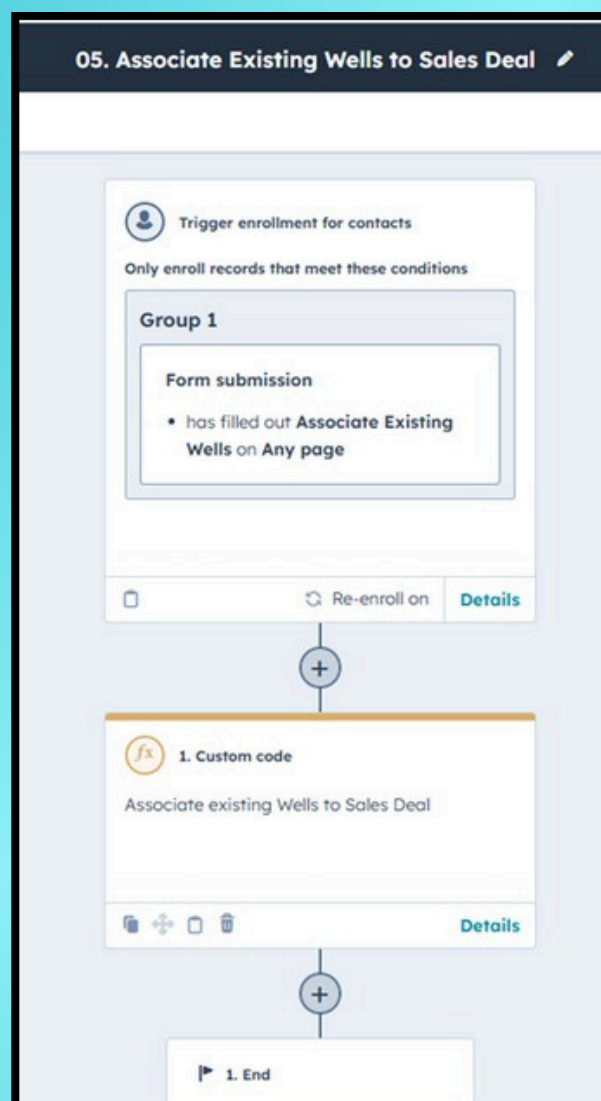
Form Name: Associate Existing Wells

This form is used in the workflow below.

Workflow Name: 05. Associate Existing Wells to Sales Deal

In this workflow, we have used a form (Associate Existing Wells).

Upon form submission, we trigger a custom code action

**In this action, we will:**

- Retrieve information from the contact's deal owner.
- Associate wells with the sales deal.

Form Name: Assign and Associate Consultant to Sales Deal

This form is used in the workflow below.

Workflow Name : 06. Associate Consultant to a New Sales Deal

The workflow is triggered upon form submission and the values of two properties are known.

Properties:

- 1) Sales Deal Id To Be Assigned
- 2) Unique Project Id From Sales Deal

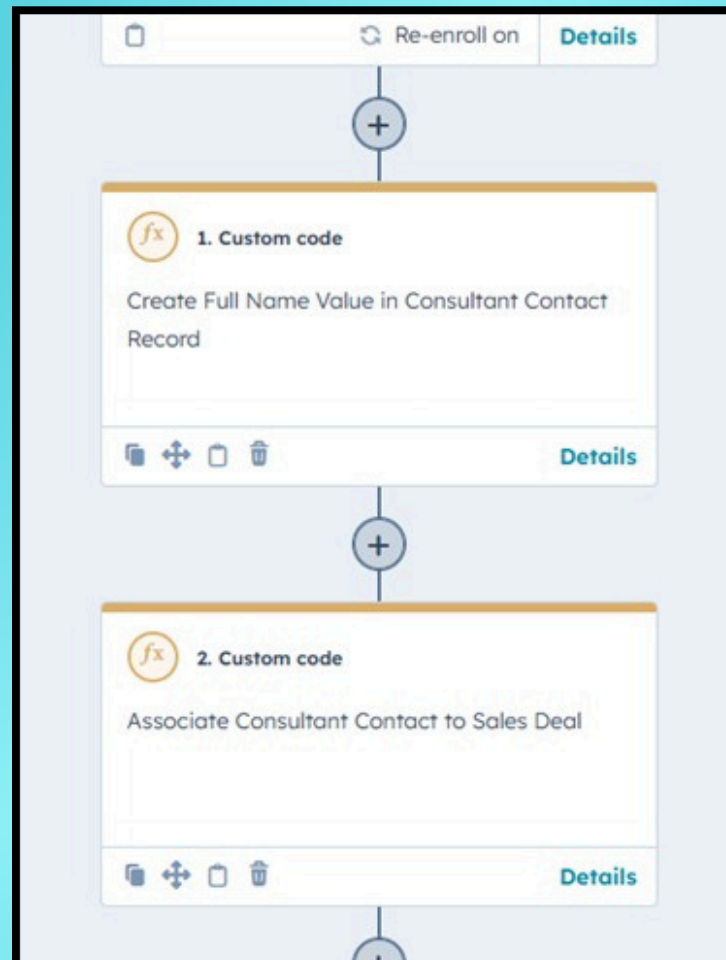
These properties receive their values when the user fills out the form in the previous workflow.

The screenshot displays a workflow configuration interface. At the top, there are three buttons: "Test contact", "Discard", and "Done". Below these is a section titled "Group 1" with a trash icon. Inside "Group 1", there are three stacked conditions, each with a trash icon:

- Condition 1: "Sales Deal Id To Be Assigned is known"
- Condition 2: "AND Unique Project Id From Sales Deal is known"
- Condition 3: "AND Form submission" (which contains a list of criteria: "has filled out Assign and Associate Consultant to Sales Deal on Any page" and a "+ Add criteria" button)

Below the "Form submission" condition is another "AND" condition with a "+ Add criteria" button. At the bottom of the interface, there is an "OR" label, indicating that the entire group of conditions is part of a larger logical structure.

Upon form submission, the workflow is triggered, followed by two custom code actions: one to create the full name value in the consultant's contact record and another to associate the consultant's contact with the sales deal.



In first action we will:

Retrieve consultant information, then generate the full name value in the contact.

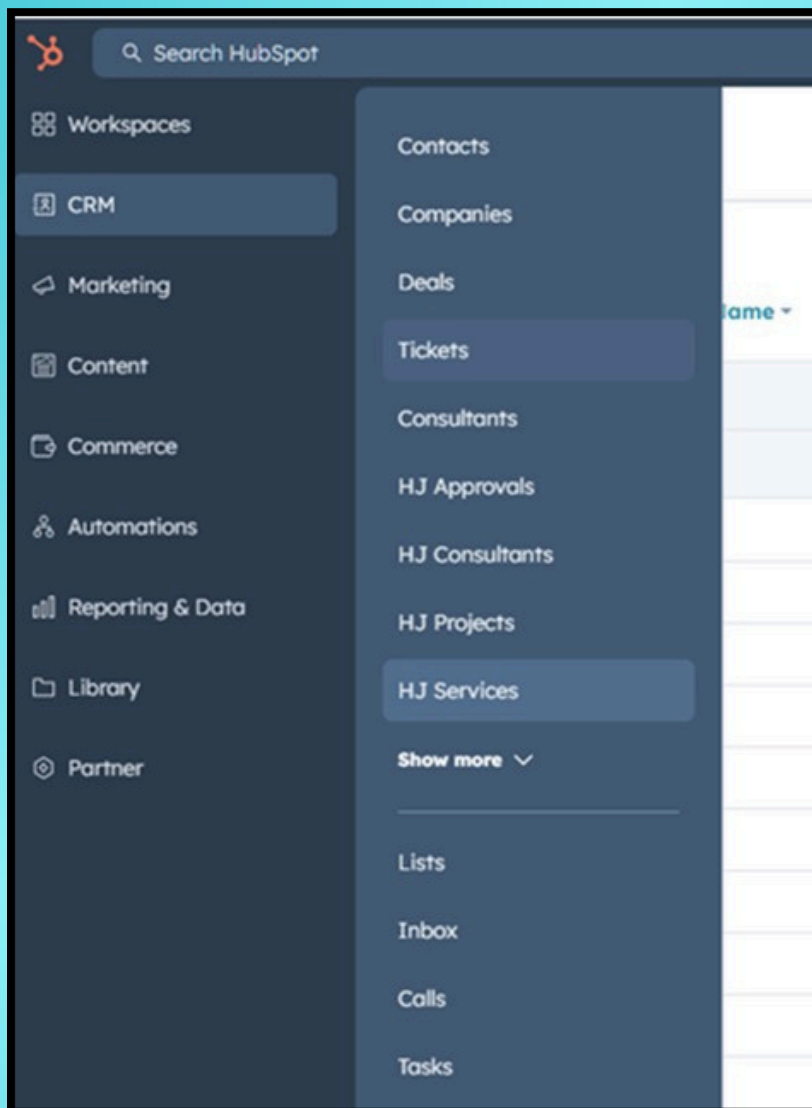
In 2nd action we will:

Retrieve consultant information and obtain the deal ID stored in the sales deal ID property, then associate the consultant with the sales deal under the label "CONSULTANT."

the next step - Scoop of work. For scope of work you will only be able to select services associated with Consultant.

If you need to create a new service, you can do this in two ways:
In HJ Service custom object

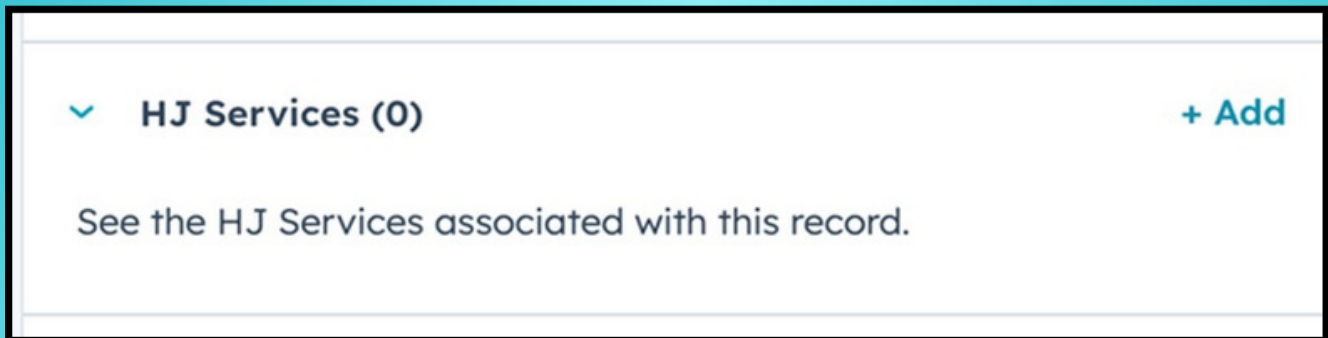
Go to Menu-CRM-HJ Services



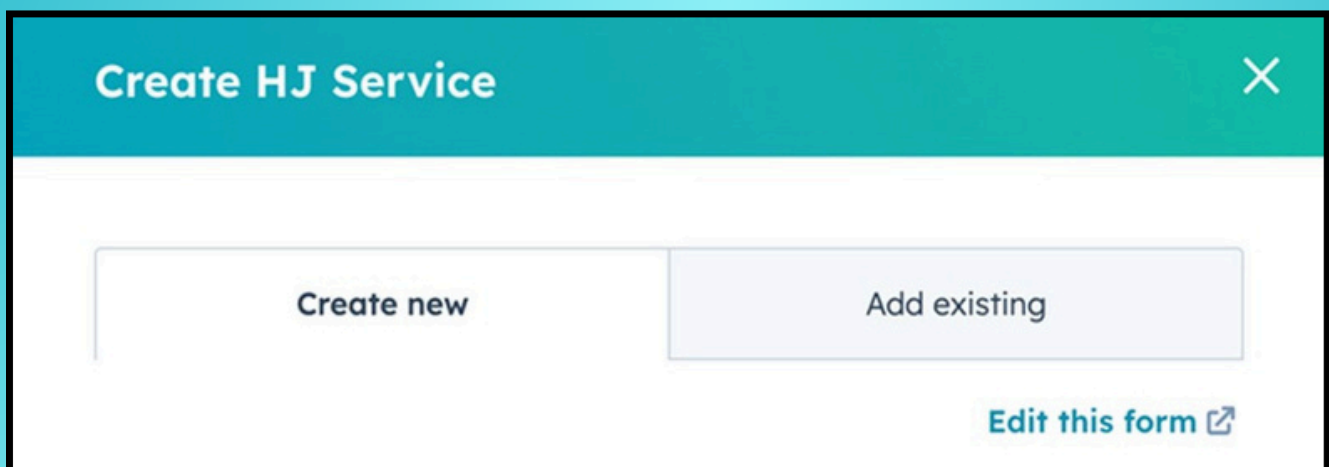
Click on the button Create HJ Service (upper right corner).

From Recruiting Deal

Right side panel → HJ Services → Add



Select tab Create new



In both cases, form will appear. Service name must be unique. Depending on Billing frequency choice, you need to insert default prices for Consultant and for Customer.

The image shows a web form for configuring a service. It includes the following fields and sections:

- Service Name ***: A text input field containing the placeholder text "Here goes Service Name".
- Billing Frequency ***: A dropdown menu currently showing "Hour or Day".
- Dependent properties ⓘ**: A section containing four pricing fields:
 - Consultant Hourly Price ***: A text input field with the value "\$100.00".
 - H&J Hourly Price ***: A text input field with the value "\$120.00".
 - Consultant Daily Price ***: A text input field with the value "\$800.00".
 - H&J Daily Price ***: A text input field with the value "\$960.00".
- SKU**: A text input field containing the value "OPTIONAL".

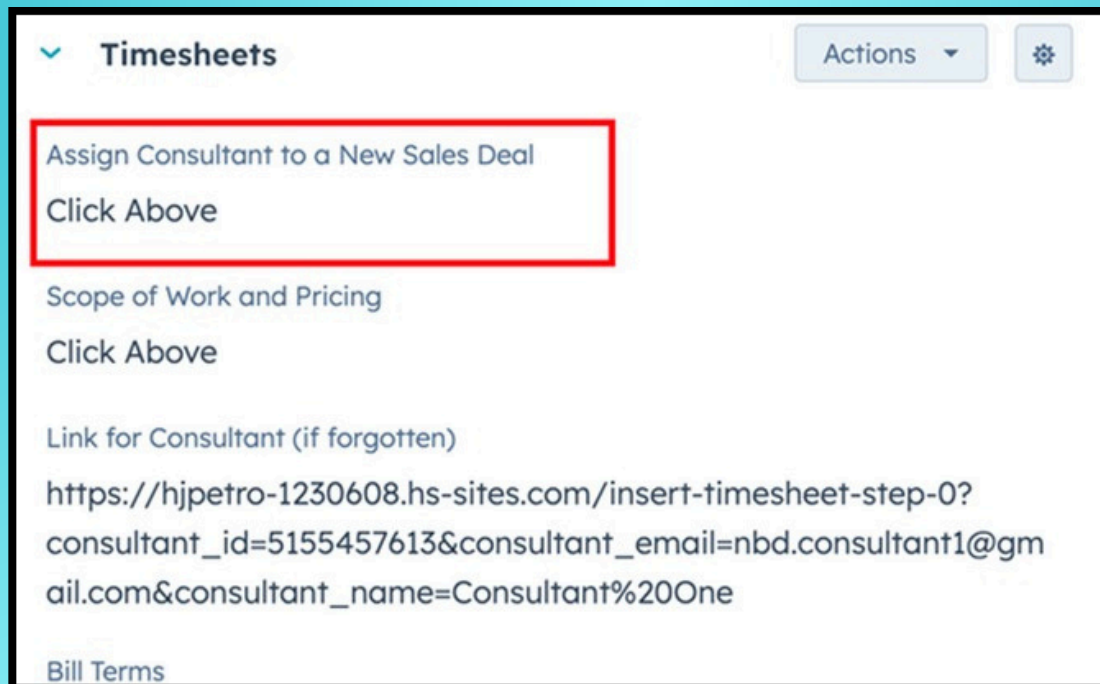
1.Important note: Always insert price for Consultant and for Customer (H&J Price) even if they are the same. You can always set different prices during creation of Scope of Work for Consultant for particular Sales Deal/Project

2.Important note: You can use the same Service with different pricing within the same Sales Deal if Well or Consultant are different.

3.Important note: You can use the same Service with different pricing for new Sales Deal.

4.Continuing with Deal in H&J Recruiting Pipeline

Now we need to associate Consultant to a Sales Deal using hyperlink property Assign Consultant to a New Sales Deal from the left side section Timesheets- click on the property link, currently password is hjpetro123 (6/4/2024)



- Web page application Assign a Consultant to a New Sales Deal will open
- Select Sales Deal Name dropdown property will appear & Deal should be selected Click on the NEXT button
- Click on the ASSIGN CONSULTANT NOW! Button There will be information Consultant is assigned & associated to Deal with 2 buttons available
- CONSULTANT RECRUITING DEAL - link to H&J Recruiting Pipeline Deal SALES DEAL - link to HJ Petroleum pipeline Sales Deal

If you open Sales deal there will be one more Contact associated labeled as Consultant

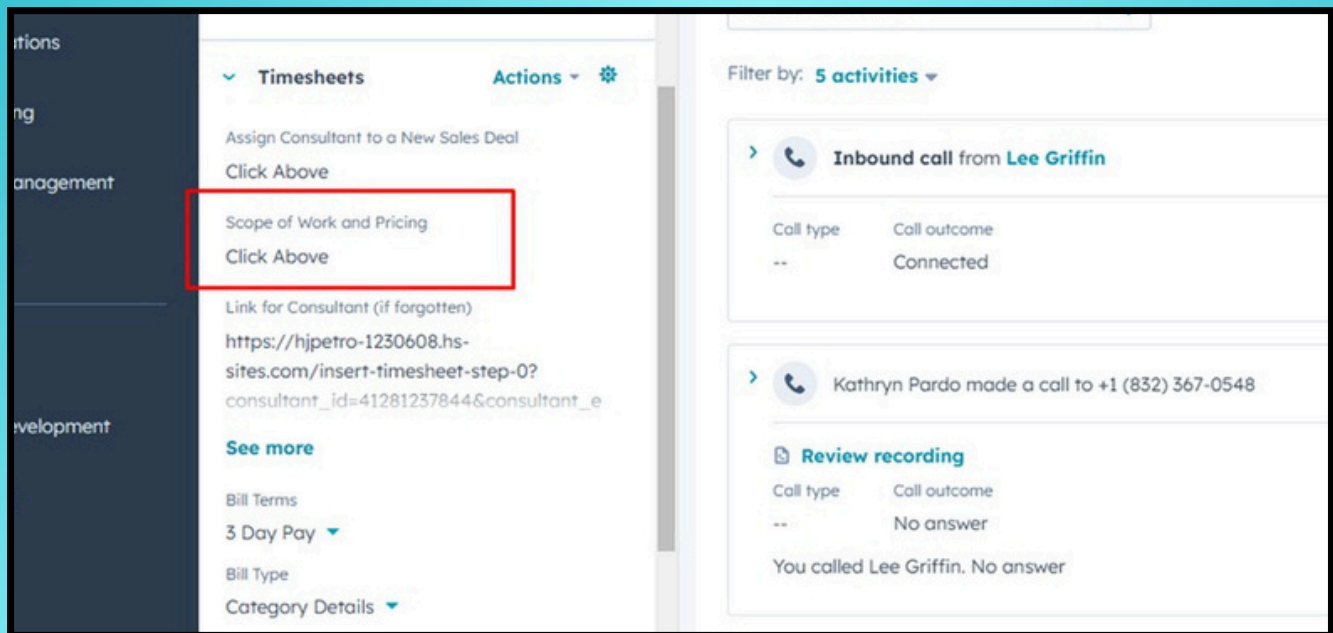
Repeat steps from 3 to 11 if you need to assign more Consultants to the same project

2nd Flow based on H&J Recruiting Pipeline Stages:

- Lead
- Resume Reviewed
- Needs Re-engagement
- Screened
- Reference Check Needed
- References Checked
- Reached out to Schedule Interview
- Interviewed
- SME Interviewed
- Qualified
- Onboarded - Missing Prequalifications
- Qualified, Not Compliant
- Qualified, Compliant
- Working For H&J
- Qualified, Compliant, Unavailable
- Qualified, but Unavailable
- Unavailable
- No Response
- Unqualified
- Blacklisted

Create Scope of Work

- Process of creating Scope of Work for Consultants starts from H&J Recruiting Pipeline
- Select a Deal representing consultant you want to create Scope of Work for
- Now we need to click on hyperlink property Scope of Work and Pricing from the left side section Timesheets - click on the property link



- Web page application Scope of Work and Pricing will open
- Select Sales Deal Name from the dropdown list (only Deals associated with Consultant using instructions from the 3rd step will appear)
- Click CREATE NEW button
- On the next screen we need to select Well from the dropdown list (only Wells associated with Project using instructions from the 2nd step will appear)
- Click on NEXT button
- Final screen is for selecting Consultant's Role and Job/Service from a dropdown lists (only Roles and Services associated with Consultant will appear)
- Update prices if necessary
- Click on SUBMIT button

Several buttons will appear on the next screen

1. Prepare Another Scope of Work For The Same Consultant And For The same Project - YES or NO, GO TO RECRUITING DEAL

If YES, repeat steps from 7 to 11

2. Request Approval for this Scope of Work? - REQUEST NOW

3. VIEW ALL

a. If VIEW ALL was clicked, Filter status will appear with following options

All

Created

Submitted for Approval

Approved

Rejected

b. Use VIEW ALL to double check information and update if necessary

If any updates were made, click on the button CONFIRM

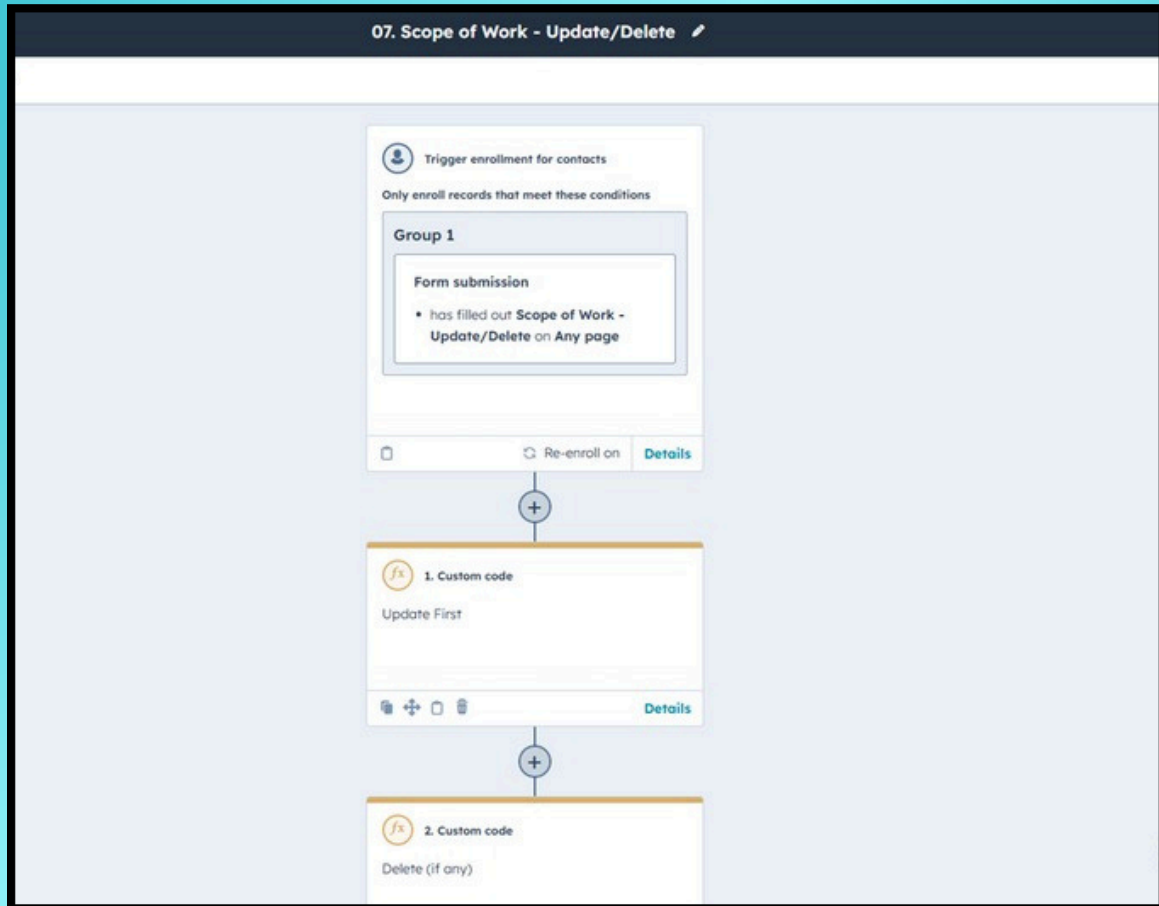
You can also go back to PREVIOUS STEP using available button

Form Name: Scope of Work - Update/Delete

This form is used in workflow and website

Website: <https://hjpetro-1230608.hs-sites.com/prepare-consultants-overview>

I have already described the form at the end of the previous step, "Create Scope of Work."

Workflow Name: 07. Scope of Work - Update/DeleteStages:

Upon form submission, the workflow is triggered to retrieve information from the form submission and update records in the custom object "HJ Consultants."

Updated Properties:

- Consultant Hourly Price
- Consultant Daily Price
- H&J Hourly Price
- H&J Daily Price
- Consultant Fee/One Time Price
- H&J Fee/One Time Price
- Consultant Per Each Price
- H&J Per Each Price
- Consultant Per Mile Price
- H&J Per Mile Price

```
65     path: '/crm/v3/objects/2-26103040/' + setRecordIdsArray[i],
66     body: {
67       "properties": {
68         "hourly_role_price": setConsultantHourlyPricesArray[i],
69         "daily_role_price": setConsultantDailyPricesArray[i],
70         "hj_hj_hourly_price": setHjHourlyPricesArray[i],
71         "hj_hj_daily_price": setHjDailyPricesArray[i],
72         "fee_one_time_price": setConsultantOneTimePricesArray[i],
73         "hj_hj_fee_one_time_price": setHjOneTimePricesArray[i],
74         "per_each_price": setConsultantPerEachPricesArray[i],
75         "hj_hj_per_each_price": setHjPerEachPricesArray[i],
76         "per_mile_price": setConsultantPerMilePricesArray[i],
77         "hj_hj_per_mile_price": setHjPerMilePricesArray[i]
78       }
79     }
80   }
81 }
```

After this, another workflow is triggered when the user clicks the "Request Now" button I already described in the previous step for scope of work approval.

Form Name: Scope of Work - Request for Approval

This form is used in workflow and website.

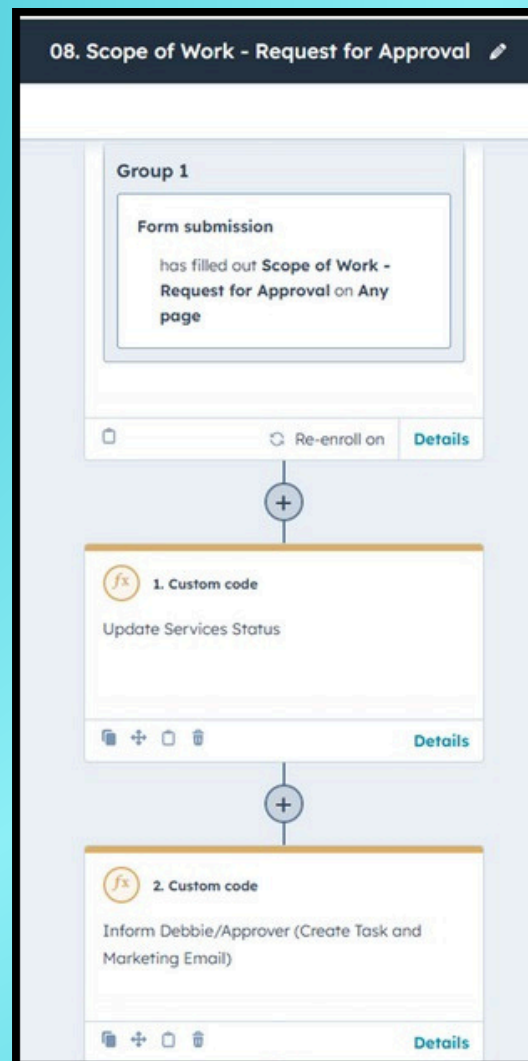
Website:

<https://hjpetro-1230608.hs-sites.com/prepare-consultants-overview>

<https://hjpetro-1230608.hs-sites.com/prepare-consultants-03-overview>

Workflow Name : 08. Scope of Work - Request for Approval

Upon form submission, the workflow is triggered, & two custom code actions are used within this workflow.

**In First action:**

Retrieve information from the form submission, then update Properties in the consultant object.

Updated Properties:

- Approved
- Unique Approval Request

In Second Action:

Retrieve information from the form submission, then create variables for the task, create and associate the task with owners, and update the approver contact (Consultant) with the marketing email button.

Note: Earlier, the deal used to be assigned to Kathyren for approval, but now it is assigned to Debbie.

```
/* 03. UPDATE APPROVER CONTACT WITH MARKETING EMAIL BUTTON */
try {
  const ApiResponse3 = await hubspotContacts
  .apiRequest({
    method: 'PATCH',
    path: '/crm/v3/objects/contacts/216601',
    body: {
      "properties": {
        "sof_marketing_email_view_request_button": createApprovalLink,
        "sof_send_request_marketing_email": "Yes"
      }
    }
  });
} catch (err) {
  console.error(err);
  throw err;
}
```

Form Name: Scope of Work - Approval

This Form is used in workflow and website

Website:

hjetpetro-1230608.hs-sites.com/approve-scope-of-work-01

Workflow Name: 09. Scope of Work - Approval

Upon form submission, the workflow is triggered, and two custom code actions are used within this workflow.

In First Action:

Retrieve information from the form submission, then update records in the custom object "HJ Consultants."

Updated Properties:

- Approved
- Consultant Hourly Price
- Consultant Daily Price
- H&J Hourly Price
- H&J Daily Price
- Consultant Fee/One Time Price
- H&J Fee/One Time Price
- Consultant Per Each Price
- H&J Per Each Price
- Consultant Per Mile Price
- H&J Per Mile Price
- Scope of Work Approval Comment

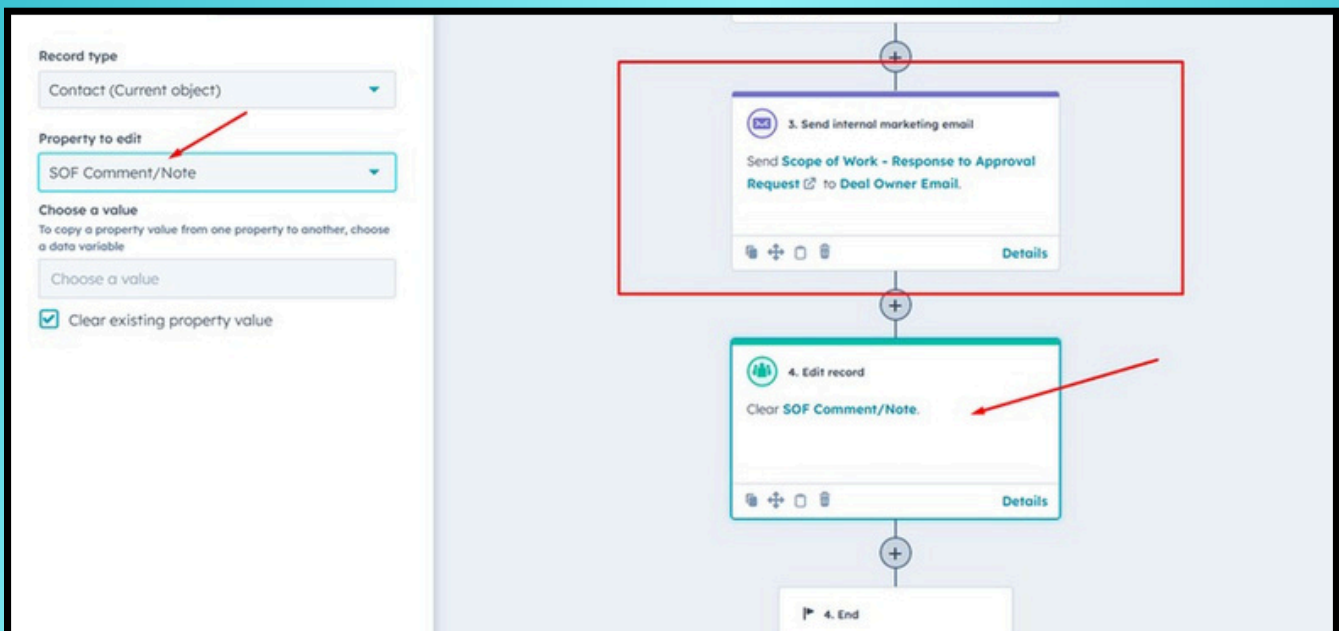
In First Action:

Retrieve information from the form submission, then create note and update the approver contact (Consultant) with the marketing email button.

Properties: 1. SOF Marketing Email View Response Button

```
/* 03. UPDATE APPROVER CONTACT WITH MARKETING EMAIL BUTTON */
try {
  const ApiResponse3 = await hubspotContacts
    .apiRequest({
      method: 'PATCH',
      path: '/crm/v3/objects/contacts/' + getContactIdToSendInternalEmail,
      body: {
        "properties": {
          "sof_marketing_email_view_response_button": createMarketingEmailButton
        }
      }
    });
} catch (err) {
  console.error(err);
  throw err;
}
```

After this send email (Scope of Work - Response to Approval Request) to the user (Consultant) for approval. And then edit the property “SOF Comment/Note”.



Form Name: Notify Consultant

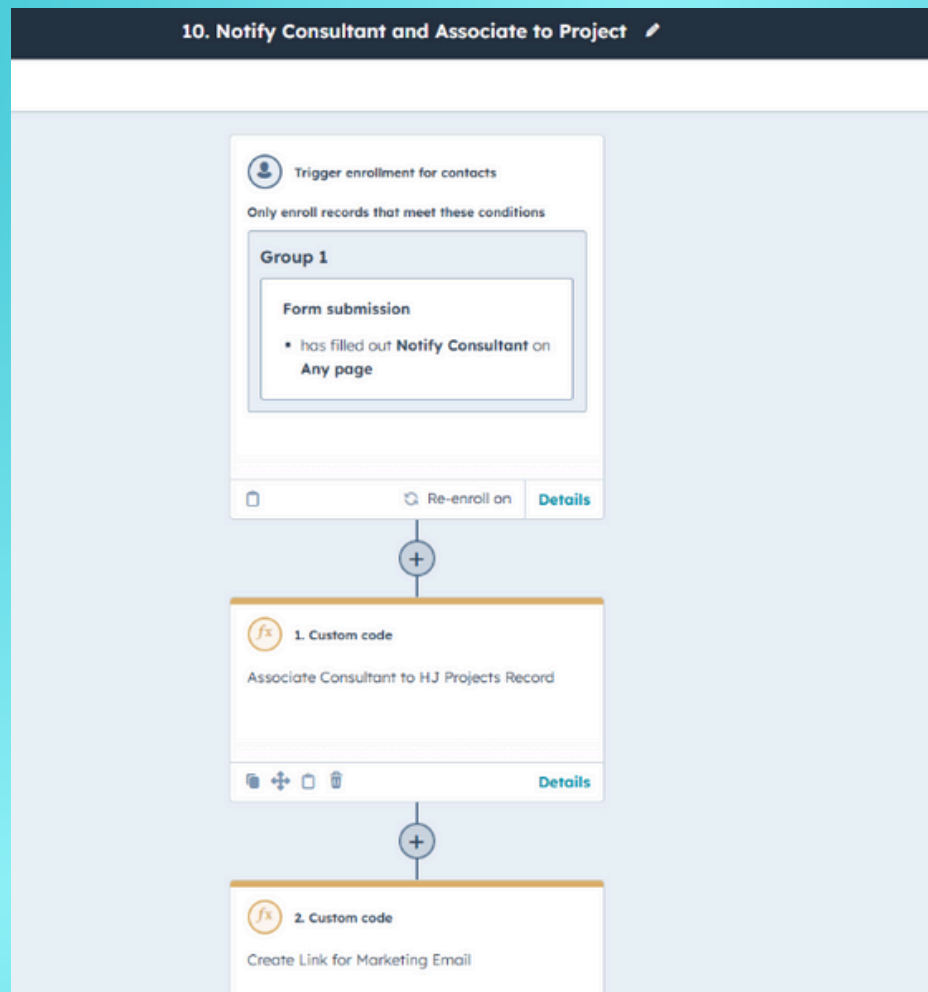
This Form is used in workflow and website

Website:

hjpgetro-1230608.hs-sites.com/approve-scope-of-work-02

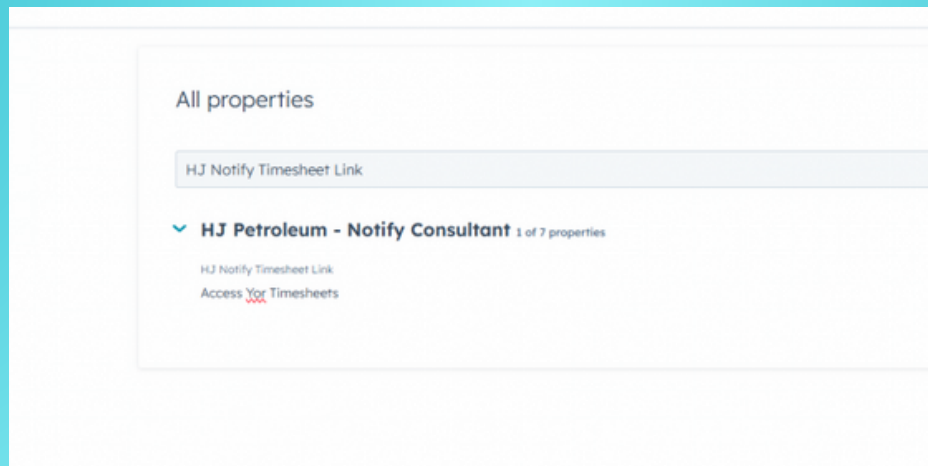
Workflow Name: 10. Notify Consultant and Associate to Project

Upon form submission, the workflow is triggered, and two custom code actions are used within this workflow.

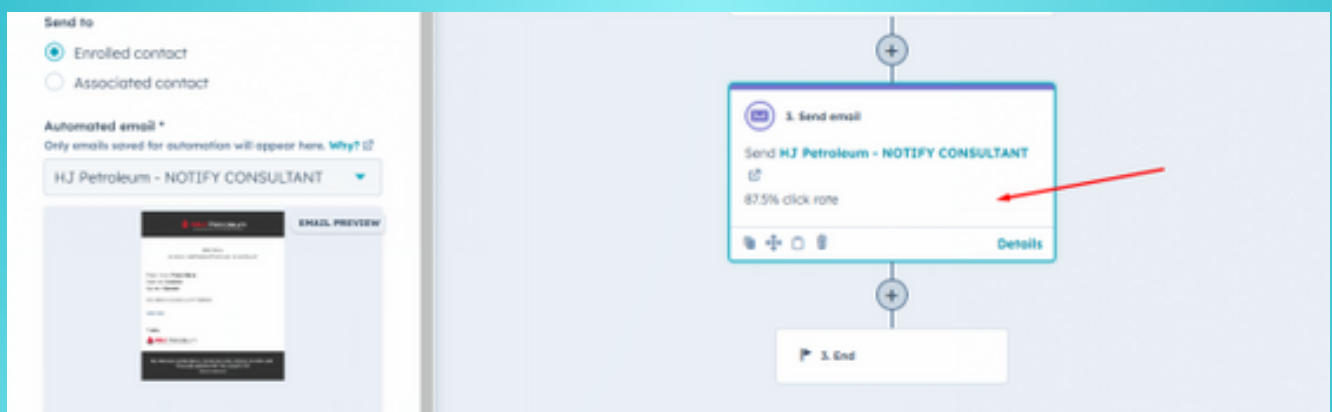


In First Action: Upon form submission, retrieve the contact (Consultant) information. From this, obtain the “Project Object ID” and use it to associate the custom object (HJ Project).

In Second Action: Retrieve information from the form submission, then update the Timesheet in Contact Property.

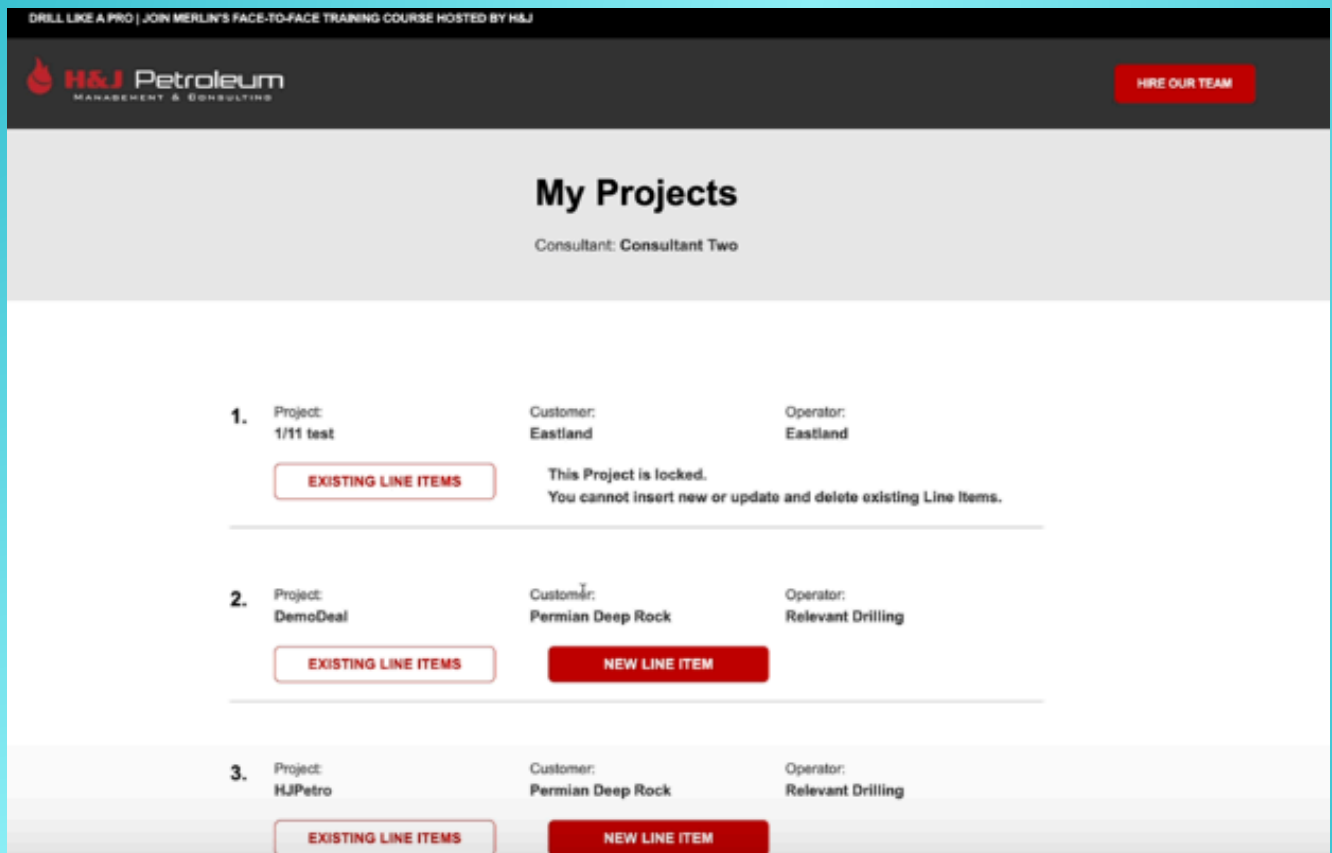
Property:**1. HJ Notify Timesheet Link**

After this send email (HJ Petroleum - NOTIFY CONSULTANT) to Contact (Consultant). In this email we will send Timesheet Access.

**1st step - Consultant opens My Project webpage**

1. Click on the link from received email, which will take Consultant to My Project webpage

Important note: Consultant will always use the same link for inserting timesheets. Therefore, it is helpful for the consultant to bookmark this link in the browser



My project web page elements

1. Project: the name of the project Consultant is hired for
 2. Customer: the name of the client Consultant is hired for
 3. Operator: the name of the Operator (can be the same or different then Customer)
 4. EXISTING LINE ITEMS button - click on it to see timesheet line items created by Today
 5. NEW LINE ITEMS button - click on it to create new timesheet line item
 6. It's clearly communicated if the Project is locked and therefore Timesheets line items can't be added
- There is a notice: The Project is locked NEW
 - LINE ITEM button is unavailable Important
 - Note: Project is locked if it is completed

2. Project: DemoDeal Customer: Permian Deep Rock Operator: Relevant Drilling

EXISTING LINE ITEMS NEW LINE ITEM

3. On the next page consultant will be informed of existing line items & prompted to create new one.

My Line Items

Consultant: Consultant Two
Project Name: DemoDeal

Currently You Don't Have Line Items

INSERT NEW LINE ITEM BACK TO MY PROJECTS

4. Click on the INSERT NEW LINE ITEM button

Fill Out The Timesheet

Step 1 - Consultant shall Select Role he is hired for on the Project - available values will be listed in a drop down - and click on NEXT STEP button

Fill Out The Timesheet Step 1 of 3

Project Name: DemoDeal
Customer: Permian Deep Rock
Operator: Relevant Drilling
Consultant: Consultant Two

Select Role *

☒ Please Select Role
Drilling Engineer

BACK TO MY PROJECTSNEXT STEP

Step 2 - Consultant shall Select Job/Service for which he is about to create the timesheet line item - available values will be listed in a drop down and click on NEXT STEP button

Fill Out The Timesheet Step 2 of 3

Project Name: DemoDeal
Customer: Permian Deep Rock
Operator: Relevant Drilling
Consultant: Consultant Two

Role: Drilling Engineer

Select Job/Service *

☒ Please Select Job/Service
Start Frac Ops
Travel Expenses

PREVIOUS STEPNEXT STEP

Step 3 - Consultant shall Select Input Type - which can be date range or Initial date/Time

Fill Out The Timesheet
Step 3 of 3

Project Name: DemoDeal
Customer: Permian Deep Rock
Operator: Relevant Drilling
Consultant: Consultant Two

Role: Drilling Engineer
Job/Service: Start Frac Ops

Start Date/Time	End Date/Time	Well	Unit	Quantity	Remove Row
-----------------	---------------	------	------	----------	------------

Select Input Type
Please Select

CONFIRM PREVIOUS STEP

Role: Drilling Engineer
Job/Service: Start Frac Ops

Start Date/Time	End Date/Time	Well	Unit	Quantity	Remove Row
-----------------	---------------	------	------	----------	------------

Select Input Type

- ✓ Please Select
- Date Range
- Initial Date/Time

CONFIRM PREVIOUS STEP

4) If selected input type is date range

- Click on Select Date Range to update date using calendar
- Click on Select Start/End Time to update start/end working time for the selected date range
- Click on Select Well and select the well from the dropdown list[1]

Role: Drilling Engineer
Job/Service: Start Frac Ops

Start Date/Time	End Date/Time	Well	Unit	Quantity	Remove Row
-----------------	---------------	------	------	----------	------------

Select Input Type
Date Range

Select Date Range
02/29/2024 - 03/06/2024

Select Start/End Time
08:00 - 16:00

Select Well
Custom

Select Unit
Custom

Select Quantity
Please Select

INSERT LINE ITEMS NOW

REMOVE ALL ROWS

CONFIRM

PREVIOUS STEP

Click on Select Unit and select Hourly or Daily rates for selected date range

If Day is selected as Unit, Select Quantity will become available and the Consultant could update part of the day he was working for (whole day, half a day, 0.7 days etc..) If Hour is selected as Unit, Select Quantity will be unavailable

5) After Input Type, Date range, Start/End Time, Well, Unit & Quantity are selected, consultant shall click on INSERT LINE ITEMS NOW button

Role: Drilling Engineer
Job/Service: Start Frac Ops

Start Date/Time	End Date/Time	Well	Unit	Quantity	Remove Row
-----------------	---------------	------	------	----------	------------

Select Input Type
Date Range

Select Date Range
02/05/2024 - 02/09/2024

Select Start/End Time
08:00 - 12:00

Select Well
DemoWell #1

Select Unit
Day

Select Quantity
0.5

INSERT LINE ITEMS NOW

REMOVE ALL ROWS

CONFIRM

PREVIOUS STEP

6) On the next screen line item range is created based on the selected data on the previous screen and Consultant can edit each of the lines.

Role: Drilling Engineer
Job/Service: Start Frac Ops

	Start Date/Time	End Date/Time	Well	Unit	Quantity	Remove Row
1.	02/05/2024, 08:00	02/05/2024, 12:00	DemoWell #1	Day	0.5	
2.	02/06/2024, 08:00	02/06/2024, 12:00	DemoWell #1	Day	0.5	
3.	02/07/2024, 08:00	02/07/2024, 12:00	DemoWell #1	Day	0.5	
4.	02/08/2024, 08:00	02/08/2024, 12:00	DemoWell #1	Day	0.5	
5.	02/09/2024, 08:00	02/09/2024, 12:00	DemoWell #1	Day	0.5	X

Select Input Type
Date Range

Select Date Range
02/05/2024 - 02/09/2024

Select Start/End Time
08:00 - 12:00

Select Well
DemoWell #1

Select Unit
Day

Select Quantity
0.5

7) On the same page Consultant can add information for a different well by selecting the data and clicking on the INSERT LINE ITEM button

	Start Date/Time	End Date/Time	Well	Unit	Quantity	Remove Row
1.	02/05/2024, 08:00	02/05/2024, 12:00	DemoWell #1	Day	0.5	
2.	02/06/2024, 08:00	02/06/2024, 12:00	DemoWell #1	Day	0.5	
3.	02/07/2024, 08:00	02/07/2024, 12:00	DemoWell #1	Day	0.5	
4.	02/08/2024, 08:00	02/08/2024, 12:00	DemoWell #1	Day	0.5	
5.	02/09/2024, 08:00	02/09/2024, 12:00	DemoWell #1	Day	0.5	X

Select Input Type
Date Range

Select Date Range
02/05/2024 - 02/09/2024

Select Start/End Time
12:00 - 16:00

Select Well
DemoWell #2

Select Unit
Day

Select Quantity
0.5

INSERT LINE ITEMS NOW

REMOVE ALL ROWS

CONFIRM

PREVIOUS STEP

Important note: If Consultant select Custom value for Wells/Units, process will be similar to explained above starting from bullet 4, except - missing information will have to be updated manually

Role: Drilling Engineer
Job/Service: Start Frac Ops

Start Date/Time	End Date/Time	Well	Unit	Quantity	Remove Row
-----------------	---------------	------	------	----------	------------

Select Input Type
Date Range

Select Date Range
02/05/2024 - 02/09/2024

Select Start/End Time
12:00 - 16:00

Select Well
Custom

Select Unit
Custom

Select Quantity
Please Select

INSERT LINE ITEMS NOW

REMOVE ALL ROWS

CONFIRM

PREVIOUS STEP

Role: Drilling Engineer
Job/Service: Start Frac Ops

	Start Date/Time	End Date/Time	Well	Unit	Quantity	Remove Row
1.	02/05/2024, 08:00	02/05/2024, 16:00	Please select	Please select		
2.	02/06/2024, 08:00	02/06/2024, 16:00	Please select	Please select		
3.	02/07/2024, 08:00	02/07/2024, 16:00	Please select	Please select		
4.	02/08/2024, 08:00	02/08/2024, 16:00	Please select	Please select		
5.	02/09/2024, 08:00	02/09/2024, 16:00	Please select	Please select		X

- 8) Once all Timesheets line items are updated, Consultant shall click on CONFIRM button
- 9) The final step is to SUBMIT the timesheet line item by clicking on the button with the same name

The screenshot shows a web application interface for H&J Petroleum Management & Consulting. At the top, there is a logo and a 'HIRE OUR TEAM' button. Below this is a table for entering timesheet data. The table has columns for Start Date/Time, End Date/Time, Well, Unit, Quantity, and a Remove Row button. Five rows of data are shown, each with a row number and a calendar icon for date selection. At the bottom of the table are 'SUBMIT' and 'CANCEL' buttons.

	Start Date/Time	End Date/Time	Well	Unit	Quantity	Remove Row
1.	02/05/2024, 08:00	02/05/2024, 16:00	DemoWell #1	Day	1	
2.	02/06/2024, 08:00	02/06/2024, 16:00	DemoWell #2	Day	1	
3.	02/07/2024, 09:00	02/07/2024, 15:30	DemoWell #1	Hour	6.50	
4.	02/08/2024, 08:00	02/08/2024, 16:00	DemoWell #2	Day	0.3	
5.	02/09/2024, 08:00	02/09/2024, 16:00	DemoWell #1	Day	1	X

SUBMIT **CANCEL**

Successfully Inserted Timesheet info

- 1) After all steps are done based on the above instructions, the Consultant will be informed that Timesheet line items were successfully

The screenshot shows a confirmation screen titled 'Fill Out The Timesheet Successfully Inserted'. It displays the following information: Project Name: DemoDeal, Customer: Permian Deep Rock, Operator: Relevant Drilling, and Consultant: Consultant Two. At the bottom, there are two buttons: 'FILL OUT ANOTHER TIMESHEET' and 'ALL TIMESHEETS FOR THIS PROJECT'.

**Fill Out The Timesheet
Successfully Inserted**

Project Name: DemoDeal
Customer: Permian Deep Rock
Operator: Relevant Drilling
Consultant: Consultant Two

FILL OUT ANOTHER TIMESHEET **ALL TIMESHEETS FOR THIS PROJECT**

2) Optionally, click on the ALL TIMESHEETS FOR THIS PROJECT button, which will list all timesheet line items created by the Consultant for the project

My Line Items

Consultant: Consultant Two
Project Name: DemoDeal
Customer: Permian Deep Rock
Operator: Relevant Drilling

1.

Well Name:	Role:	Job/Service:	Start:	End:	Unit:	Quantity:	Price:	Total Price:
DemoWell #1	Drilling Engineer	Start Frac Ops	02/05/2024 08:00	02/05/2024 16:00	Day	1.00	\$1,200.00	\$1,200.00

[UPDATE LINE ITEM](#) [DELETE LINE ITEM](#)

2.

Well Name:	Role:	Job/Service:	Start:	End:	Unit:	Quantity:	Price:	Total Price:
DemoWell #2	Drilling Engineer	Start Frac Ops	02/06/2024 08:00	02/06/2024 16:00	Day	1.00	\$960.00	\$960.00

[UPDATE LINE ITEM](#) [DELETE LINE ITEM](#)

3) At this point Consultant can double check entry and decide to

a. UPDATE LINE ITEM - click corresponding button

b. DELETE LINE ITEM - click corresponding button

4) After finishing updates of existing line items, Consultant can

a. INSERT ANOTHER LINE ITEM - click corresponding button - & then Consultant shall repeat steps from Fill Out The Timesheet - Step 1

b. SUBMIT A REQUEST FOR APPROVAL - click corresponding button

4.

Well Name:	Role:	Job/Service:	Start:	End:	Unit:	Quantity:	Price:	Total Price:
DemoWell #2	Drilling Engineer	Start Frac Ops	02/08/2024 08:00	02/08/2024 16:00	Day	0.30	\$960.00	\$288.00

[UPDATE LINE ITEM](#) [DELETE LINE ITEM](#)

5.

Well Name:	Role:	Job/Service:	Start:	End:	Unit:	Quantity:	Price:	Total Price:
DemoWell #1	Drilling Engineer	Start Frac Ops	02/09/2024 08:00	02/09/2024 16:00	Day	1.00	\$1,200.00	\$1,200.00

[UPDATE LINE ITEM](#) [DELETE LINE ITEM](#)

TOTAL: \$4,623.00

[INSERT ANOTHER LINE ITEM](#) [SUBMIT A REQUEST FOR APPROVAL](#)

Submitting a request for approval



Customer's Response to your Approval Request

Project: **DemoDeal**
Consultant: **Consultant One**
Time Period: **02/12/2024 - 02/16/2024**
Customer: **Permian Deep Rock**
Operator: **Relevant Drilling**

Customer' Comment:
Ok for Consultant One

Good Job!
Please, find the link below to see your **approved** Timesheet for this Approval Request.

[CUSTOMER'S RESPONSE TO YOUR APPROVAL REQUEST](#)

Here you can find the link to download/print Employee Timesheet

[VIEW/DOWNLOAD EMPLOYEE TIMESHEET](#)



H&J Petroleum, 701 A W Indiana Ave., Midland, TX 79701, (432) 279-1767
[Unsubscribe](#) [Manage preferences](#)

Form Name: Insert Line Items This Form is used in workflow & website

Website:

<https://hjpetro-1230608.hs-sites.com/insert-timesheet-step-1>

Workflow Name: 11. Insert Line items

Upon form submission, the workflow is triggered, and custom code actions are used within this workflow.

Retrieve information from a form submission, read HJ Consultants data, generate a line item description, and insert the data into timesheets.

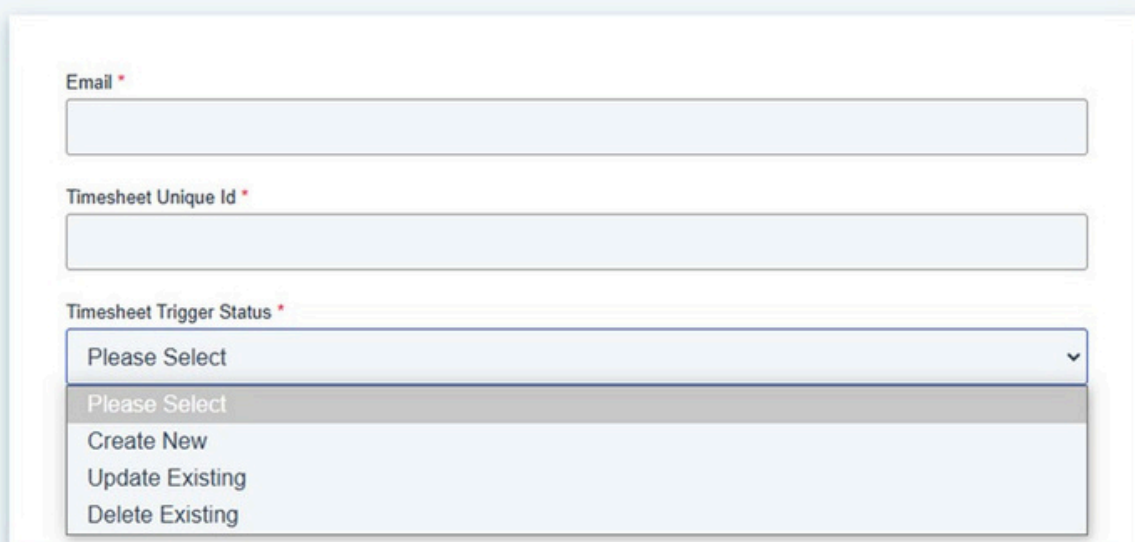
Form Name: Delete Timesheet

This Form is used in website

Website:

hjpetro-1230608.hs-sites.com/hjpetro-start-new-project-04

In this form, when the user selects the timesheet status as "Delete Existing," the workflow is triggered.

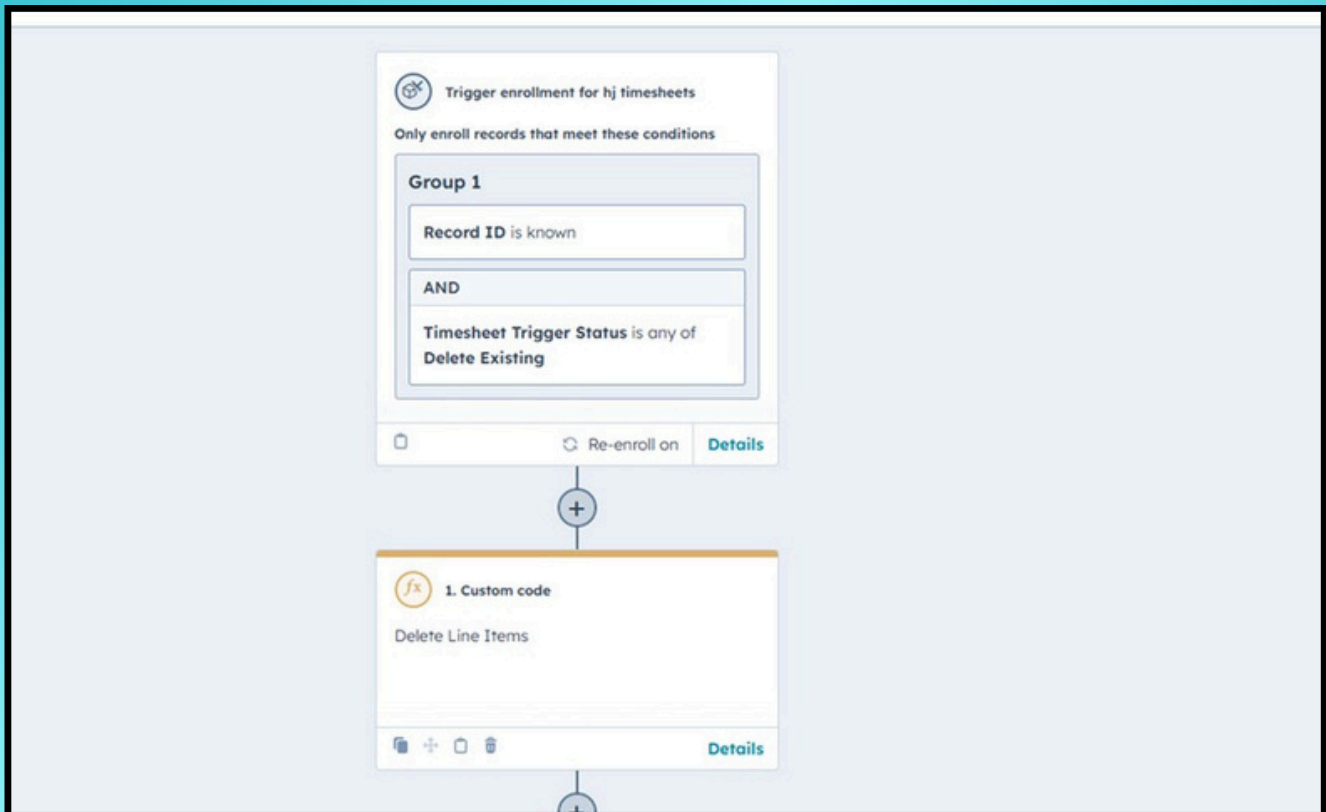


The screenshot displays a web form titled "Delete Timesheet". It contains three main input fields:

- Email ***: A text input field.
- Timesheet Unique Id ***: A text input field.
- Timesheet Trigger Status ***: A dropdown menu with the following options:
 - Please Select
 - Create New
 - Update Existing
 - Delete Existing

Workflow Name: 12. Delete Line Items

This workflow is based on HJ Timesheet. When the timesheet trigger status is set to "Delete Existing," the workflow is triggered. Within this workflow, a custom code action is used.



In custom code we will: Retrieve the timesheet ID & delete the timesheet.

Form Name: Consultant Approval Request

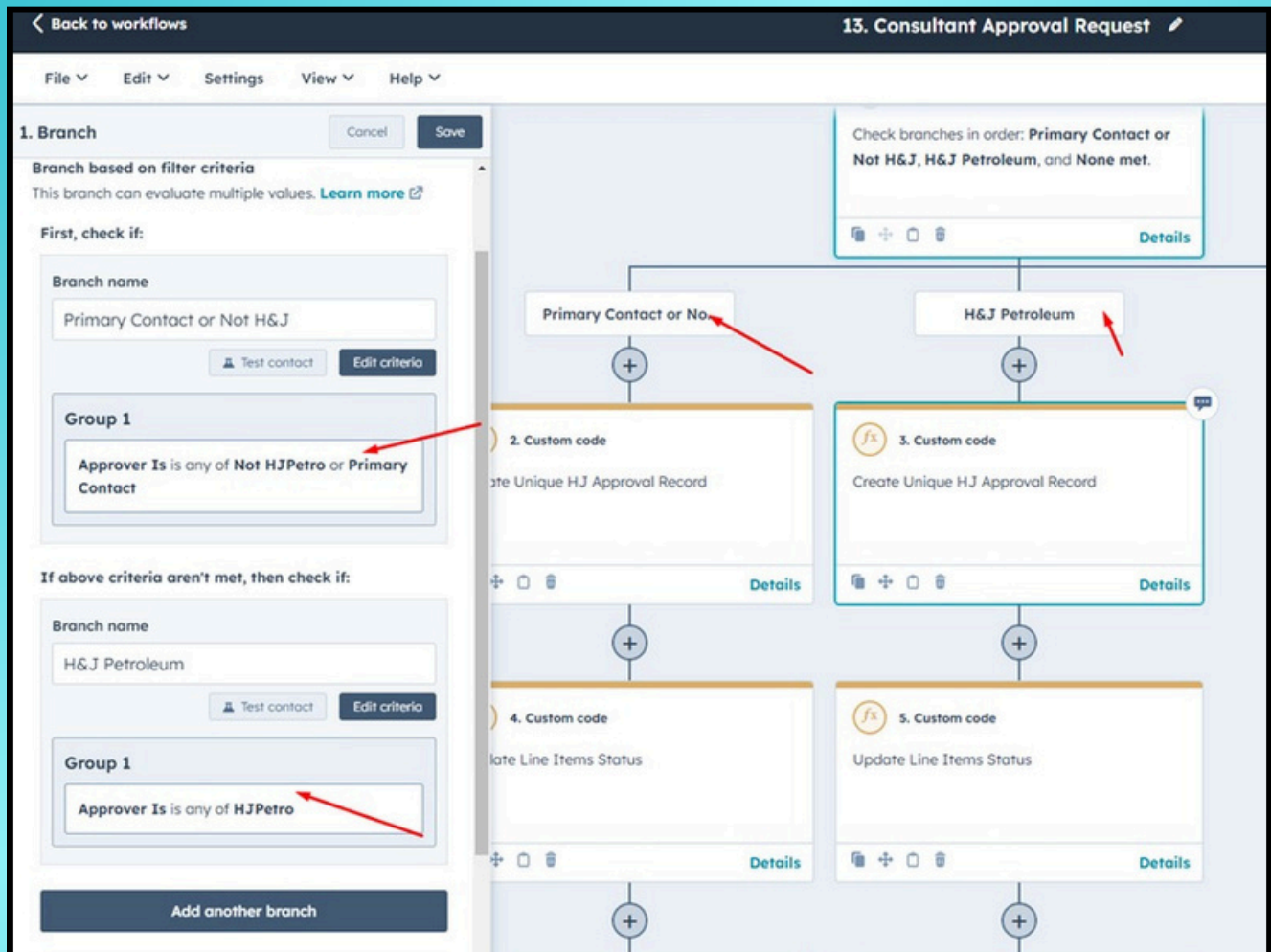
This Form is used in workflow and website

Website:

<https://hjpgetro-1230608.hs-sites.com/request-for-line-items-approval-01>

Workflow Name: 13.Consultant Approval Request

Upon form submission, the workflow is triggered, and a branch will be added to check if the approver is either "Not HJ Petro" or "Primary Contact," and if the approver is "HJ Petro."



After this check, the enrolled contact proceeds to the related action.

If the **"Not HJ Petro"** or **"Primary Contact"** criteria are matched, then proceed with the specified action.

In these actions, we will:

First Action:

- Retrieve form submission data
- Generate a unique approval request ID
- Update the consultant contact with the unique approval request ID

Second Action:

- Update timesheets

Third Action:

Retrieve well names from timesheet object records
Update the approval object record with well names
Update approver (customer) details

Fourth Action:

Prepare a marketing email for the approver (customer) regarding timesheet approval

- Create a marketing email link
- Create a marketing email button
- Update the approver/customer contact with the marketing email link

Fifth Action:

- Retrieve the sales deal owner ID
- Prepare the note body
- Create and associate a note with the sales deal

If the "**HJ Petro**" criteria are matched, then proceed with the specified action.

In these actions, we will:**First Action:**

- Retrieve information from the form submission.
- Generate a unique approval request ID.
- Update the consultant contact with the unique approval request ID.

Second Action:

- Update timesheets with relevant details.

Third Action:

- Retrieve well names from timesheet object records.
- Update the approval object record with the well names.
- Update approver (H&J) details.

Fourth Action:

- Retrieve information from the form submission.
- Get the approver owner ID.
- Get deal information.
- Get customer contact information.
- Create and associate a task for tracking.
- Update the approval object record with well details.
- Generate internal email notification links.
- Update the deal owner contact with internal notification links.

Fifth Action:

- Send an email titled "HJ Petroleum - Request for Approval (H&J)".
- Include the details mentioned in the screenshot in this email.

H&J Petroleum
MANAGEMENT & CONSULTING

New Request for Timesheet Approval

Approver: Approver
Approver Name: Approver Name

Consultant: **Consultant Full Name**
Period: **From Date-Until Date**

Project/Deal Owner: **Owner Full Name**
Project Name: **Project Name**
Customer: **Customer**
Operator: **Operator**

Page Link

Deal Link

Thanks,

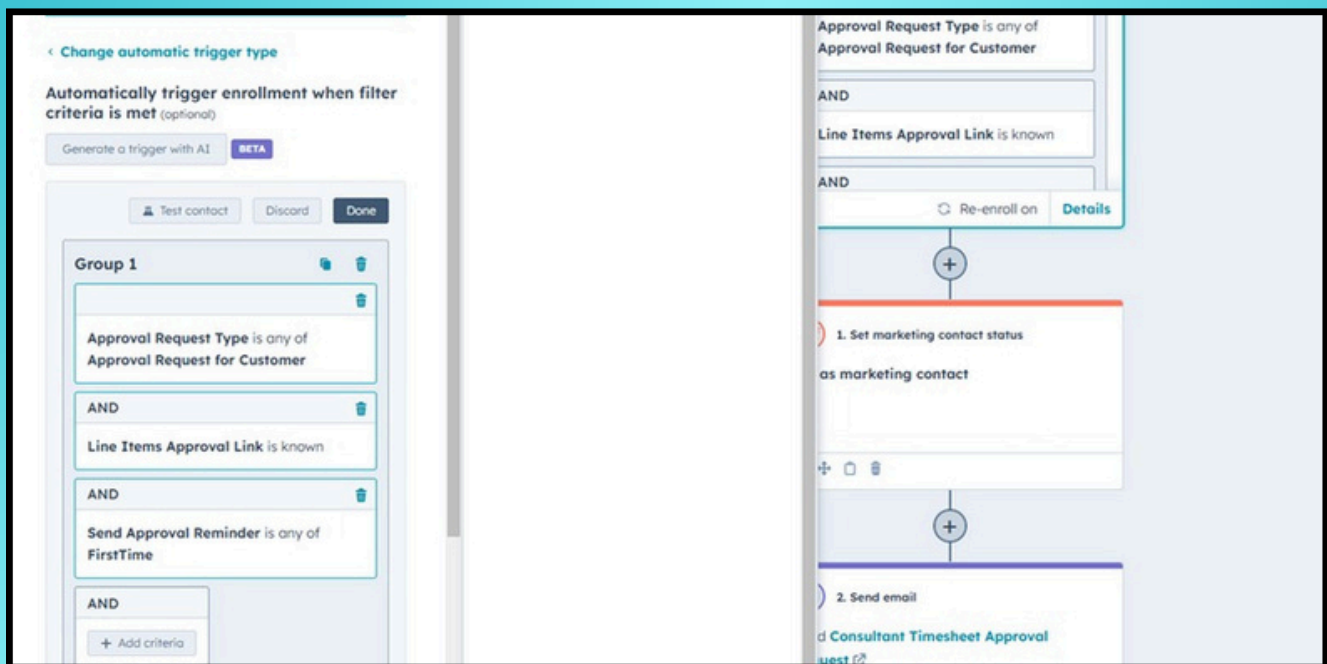
H&J Petroleum
MANAGEMENT & CONSULTING

H&J Petroleum and PetroSuites, 701 W Indiana Ave., Midland, TX 79701, USA
PetroSuites (432)704-5190 / H&J (432)279-1767

After this consultant check the request and then

Workflow Name: 14. Approval Request - CUSTOMER (Marketing Email)

The workflow is triggered when the properties mentioned in the screenshot are changed.



In this workflow we will:

Set the contact as a marketing contact, then send the email (Consultant Timesheet Approval Request) to the consultant for approval. After that, clear the **Approval Request Type** and **Line Items Approval Link** contact properties.

When the email is received, follow these steps:

1st step - Approver receives Approval request from Consultant

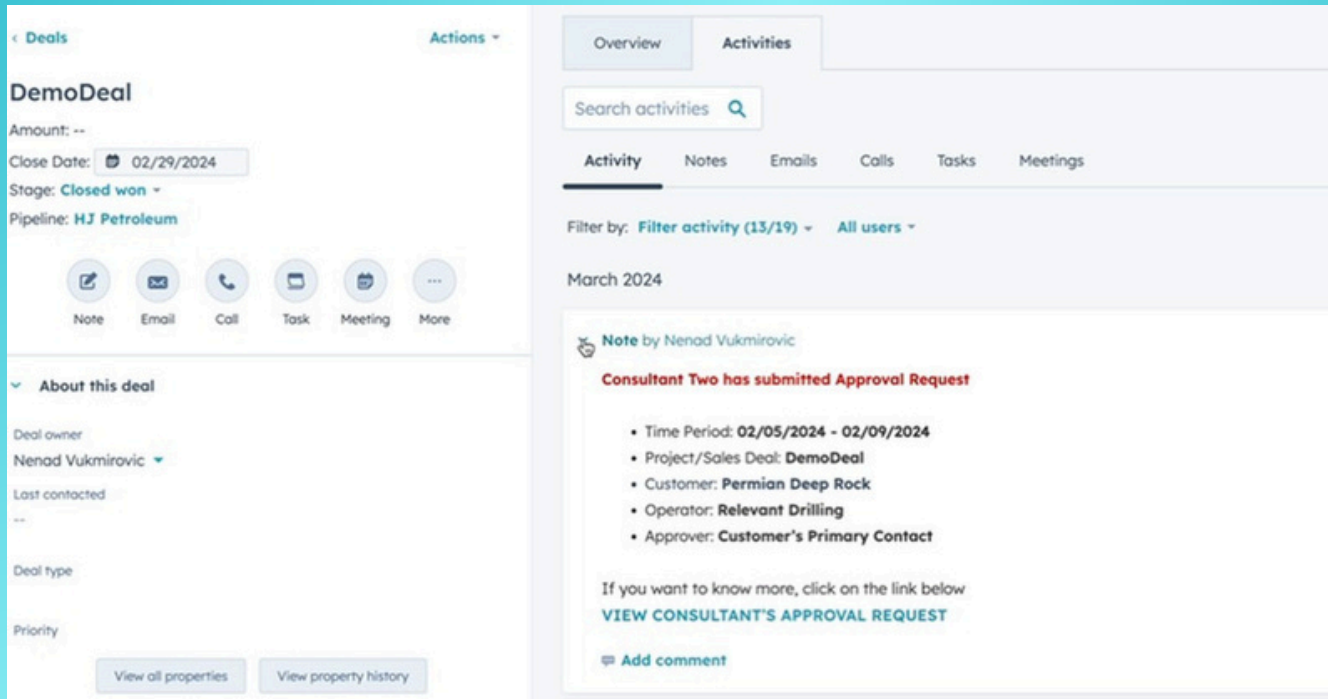
1. Process starts with an email received by Approver. At the same time, note on related Sales Deal will be created

- Email is sent by automation from H&J Petroleum Consultants after approval was requested by Consultant
- Approver receives an email in his inbox



2) Consultant should click on the link **APPROVE OR REJECT THE TIMESHEET** from the email

3) Note is created on the Sales Deal



4) Click on the VIEW CONSULTANT'S APPROVAL REQUEST from note will open Approver to Request for Timesheet Approval informational web page; it's not possible to approve timesheets from informational page, the page is view only.

2nd step - Approver opens Approval webpage

1) Click on on the link from the NOTE on the Sales Deal, which will take the Approver to Request for Timesheet Approval informational webpage

Request for Timesheet Approval

Approver: Customer's Primary Contact

Consultant Two
02/05/2024 - 02/09/2024

Project Name: DemoDeal
Customer: Permian Deep Rock
Operator: Relevant Drilling

	Role	Job/Service	Start	End	Well Name	Unit	Quantity	Consultant Total	Customer Total
1.	Drilling Engineer	Start Frac Ops	02/05/2024 08:00	02/05/2024 16:00	DemoWell #1	Day	1.00	\$1,200.00	\$1,500.00
2.	Drilling Engineer	Start Frac Ops	02/06/2024 08:00	02/06/2024 16:00	DemoWell #2	Day	1.00	\$960.00	\$1,200.00
3.	Drilling Engineer	Start Frac Ops	02/07/2024 09:00	02/07/2024 15:30	DemoWell #1	Hour	6.50	\$975.00	\$1,218.75
4.	Drilling Engineer	Start Frac Ops	02/08/2024 08:00	02/08/2024 16:00	DemoWell #1	Day	1.00	\$960.00	\$1,200.00
5.	Drilling Engineer	Start Frac Ops	02/09/2024 08:00	02/09/2024 16:00	DemoWell #1	Day	1.00	\$1,200.00	\$1,500.00
6.	Drilling Engineer	Travel Expenses	02/05/2024 08:00	02/05/2024 16:00	DemoWell #1	Per Mile	52.00	\$62.40	\$78.00
7.	Drilling Engineer	Travel Expenses	02/06/2024 08:00	02/06/2024 16:00	DemoWell #1	Per Mile	52.00	\$62.40	\$78.00
8.	Drilling Engineer	Travel Expenses	02/07/2024 08:00	02/07/2024 16:00	DemoWell #1	Per Mile	52.00	\$62.40	\$78.00
9.	Drilling Engineer	Travel Expenses	02/08/2024 08:00	02/08/2024 16:00	DemoWell #1	Per Mile	52.00	\$62.40	\$78.00
10.	Drilling Engineer	Travel Expenses	02/09/2024 08:00	02/09/2024 16:00	DemoWell #1	Per Mile	52.00	\$62.40	\$78.00

CONSULTANT TOTAL: \$5,319.00

CUSTOMER TOTAL: \$6,648.75

1)The MORE IMPORTANT link is the one in the email

Click on the link **APPROVE OR REJECT THE TIMESHEET** from an email will take Approver to Field Ticket for Approval web page

HIRE OUR TEAM

Field Ticket for Approval

Consultant Two
02/05/2024 - 02/09/2024
Customer: Permian Deep Rock
Operator: Relevant Drilling

	Role	Job/Service	Start	End	Well Name	Price	Unit	Quantity	Total
1.	Drilling Engineer	Start Frac Ops	02/05/2024 08:00	02/05/2024 16:00	DemoWell #1	\$1,500.00	Day	1.00	\$1,500.00
2.	Drilling Engineer	Start Frac Ops	02/06/2024 08:00	02/06/2024 16:00	DemoWell #2	\$1,200.00	Day	1.00	\$1,200.00
3.	Drilling Engineer	Start Frac Ops	02/07/2024 09:00	02/07/2024 15:30	DemoWell #1	\$187.50	Hour	6.50	\$1,218.75
4.	Drilling Engineer	Start Frac Ops	02/08/2024 08:00	02/08/2024 16:00	DemoWell #2	\$1,200.00	Day	0.70	\$840.00
5.	Drilling Engineer	Start Frac Ops	02/09/2024 08:00	02/09/2024 16:00	DemoWell #1	\$1,500.00	Day	1.00	\$1,500.00
9.	Drilling Engineer	Travel Expenses	02/08/2024 08:00	02/08/2024 16:00	DemoWell #1	\$1.50	Per Mile	52.00	\$78.00
10.	Drilling Engineer	Travel Expenses	02/09/2024 08:00	02/09/2024 16:00	DemoWell #1	\$1.50	Per Mile	52.00	\$78.00

TOTAL: \$6,648.75

Approve or Reject this Timesheet *

Please Select

First Name *

Last Name *

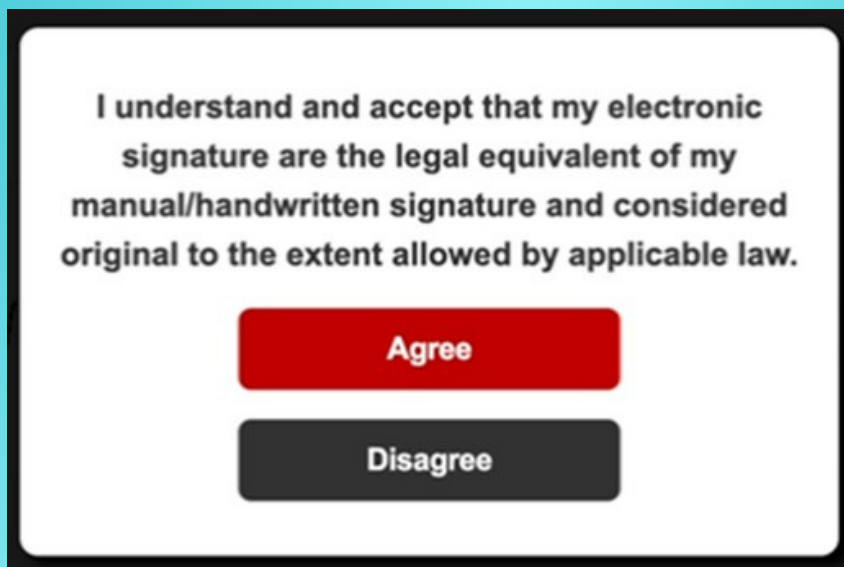
Email Address *

Your Comment/Note *

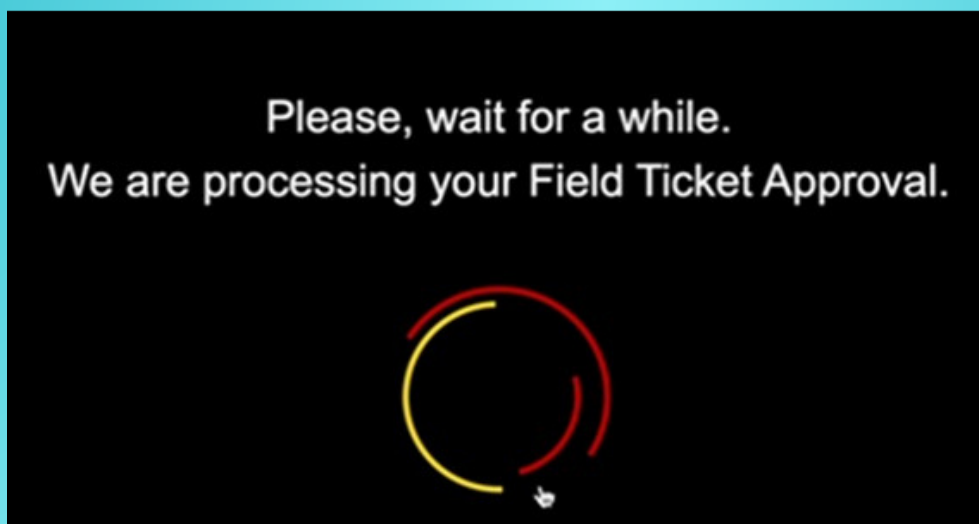
3rd step - Approval options

Approve timesheets

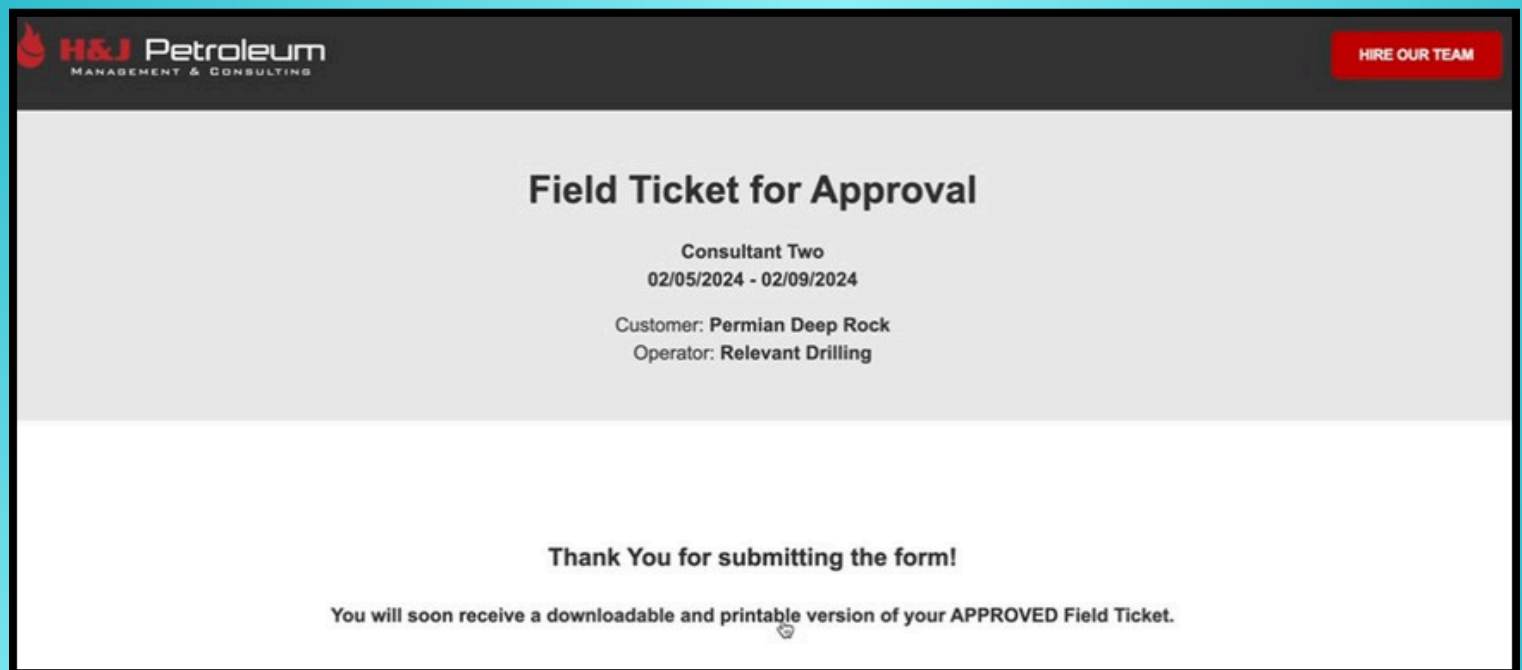
1. Select Approve from **Approve or Reject this Timesheet** 2. Update: **First name, last name, Email Address, Your Comments/Note fields: all of them are mandatory**
3. Sign Approval using **Your E-Signature** field and click on **SUBMIT SIGNATURE**
4. Click **Agree** button on popup



- 5) Wait while Field Ticket approval is processed



6) Informational thank you page will appear



H&J Petroleum
MANAGEMENT & CONSULTING

[HIRE OUR TEAM](#)

Field Ticket for Approval

Consultant Two
02/05/2024 - 02/09/2024

Customer: Permian Deep Rock
Operator: Relevant Drilling

Thank You for submitting the form!

You will soon receive a downloadable and printable version of your APPROVED Field Ticket.

7) Sales deal owner will be informed thru automated email & Sales Deal note



H&J Petroleum
MANAGEMENT & CONSULTING

Customer's Response to The Approval Request

Project: DemoDeal
Consultant: Consultant Two
Time Period: 02/05/2024 - 02/09/2024
Customer: Permian Deep Rock
Operator: Relevant Drilling

Customer' Comment:
All good for Consultant Two. Thanks!

Good Job! Timesheet for this Approval Request is approved.
Please, find links below to continue with the process.

[CUSTOMER'S RESPONSE TO THE APPROVAL REQUEST](#)

[VIEW DEAL](#)

H&J Petroleum
MANAGEMENT & CONSULTING

8) Consultant will be informed via automated email



a) Click on VIEW/DOWNLOAD EMPLOYEE TIMESHEET, which will open printable PDF document



Employee Timesheet

Customer: Permian Deep Rock

Operator: Relevant Drilling

Time Period: 02/05/2024 - 02/09/2024

Resepient: Consultant Two (nbd.consultant2@gmail.com)

Create Date: 03/06/2024

	Role	Job/Service	Start	End	Well Name	Price	Unit	Quantity	Total
1.	Drilling Engineer	Start Frac Ops	02/05/2024 08:00	02/05/2024 16:00	DemoWell #1	\$1,200.00	Day	1.00	\$1,200.00
2.	Drilling Engineer	Start Frac Ops	02/06/2024 08:00	02/06/2024 16:00	DemoWell #2	\$960.00	Day	1.00	\$960.00
3.	Drilling Engineer	Start Frac Ops	02/07/2024 09:00	02/07/2024 15:30	DemoWell #1	\$150.00	Hour	6.50	\$975.00
4.	Drilling Engineer	Start Frac Ops	02/08/2024 08:00	02/08/2024 16:00	DemoWell #2	\$960.00	Day	0.70	\$672.00
5.	Drilling Engineer	Start Frac Ops	02/09/2024 08:00	02/09/2024 16:00	DemoWell #1	\$1,200.00	Day	1.00	\$1,200.00
6.	Drilling Engineer	Travel Expenses	02/05/2024 08:00	02/05/2024 16:00	DemoWell #1	\$1.20	Per Mile	52.00	\$62.40
7.	Drilling Engineer	Travel Expenses	02/06/2024 08:00	02/06/2024 16:00	DemoWell #1	\$1.20	Per Mile	52.00	\$62.40
8.	Drilling Engineer	Travel Expenses	02/07/2024 08:00	02/07/2024 16:00	DemoWell #1	\$1.20	Per Mile	52.00	\$62.40
9.	Drilling Engineer	Travel Expenses	02/08/2024 08:00	02/08/2024 16:00	DemoWell #1	\$1.20	Per Mile	52.00	\$62.40
10.	Drilling Engineer	Travel Expenses	02/09/2024 08:00	02/09/2024 16:00	DemoWell #1	\$1.20	Per Mile	52.00	\$62.40

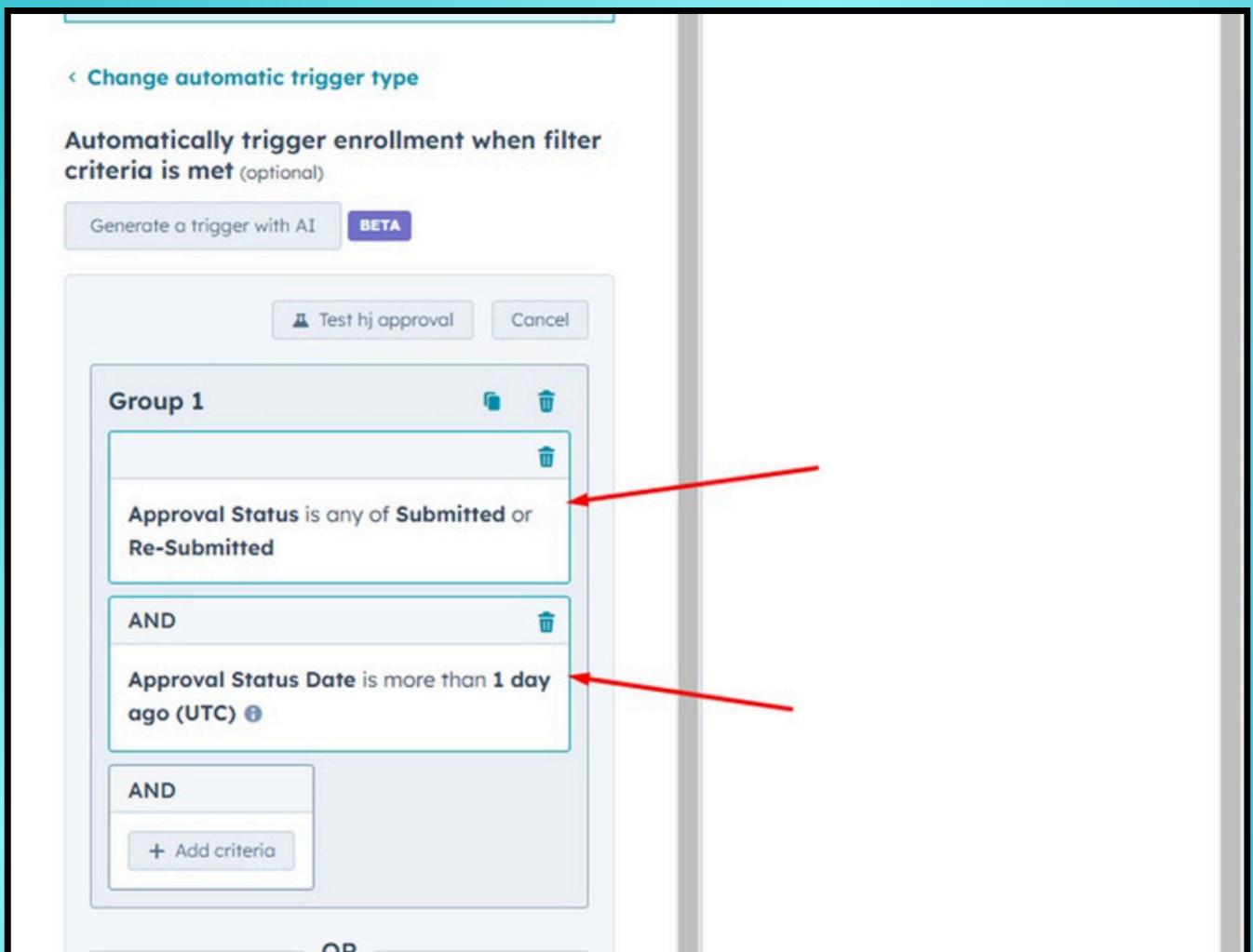
Reject timesheets

1. Select **Reject** from **Approve or Reject this Timesheet**
2. Update: **First name, last name, Email Address, Your Comments/Note fields** - all of them are mandatory
3. Click on **SUBMIT MY APPROVAL** button (e-signature is not requested)
4. Sales deal owner will be informed by automated email & Sales Deal note
5. Consultant will be informed through automated email

After this, another workflow is triggered based on the HJ Approval properties. If the approval is approved, update the property accordingly. If it is rejected, update the property based on the rejection.

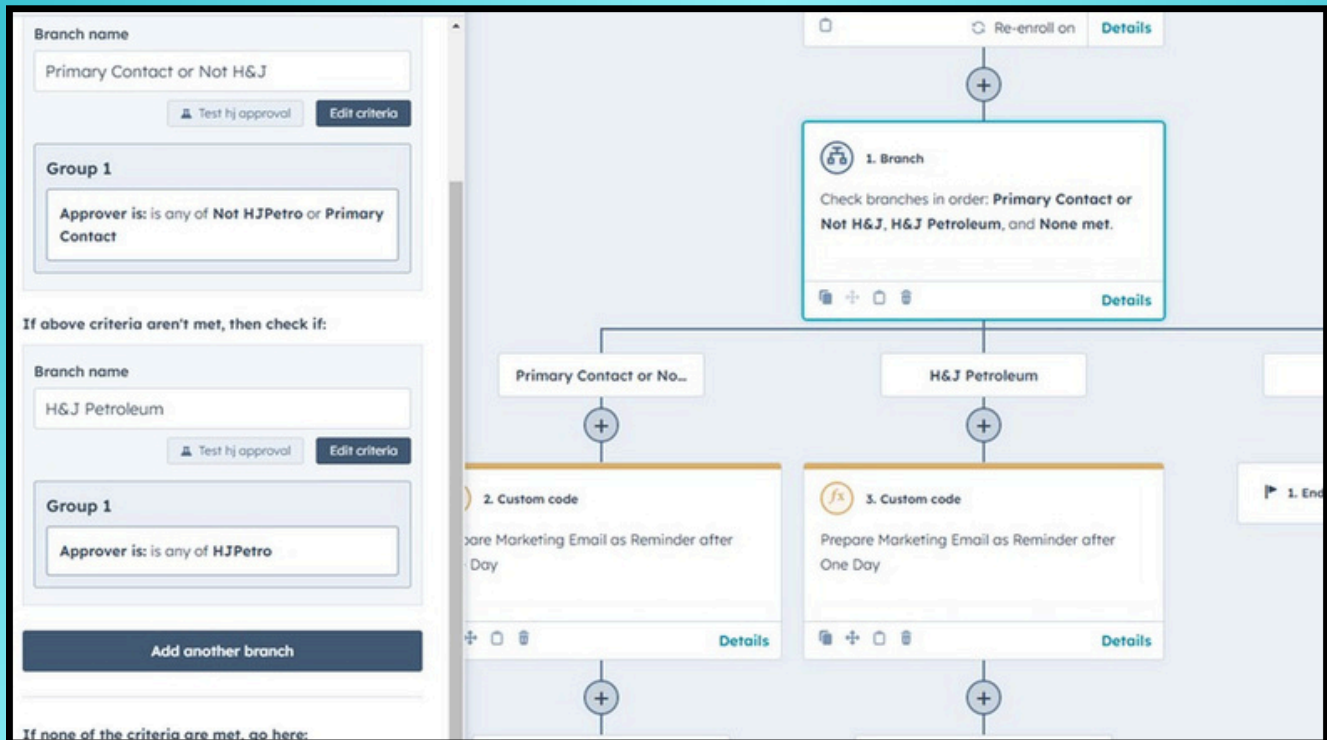
Workflow Name: 15. Reminder 1 - Consultant Approval Request

This workflow is used to send a reminder for the approval request. The is triggered when the properties are updated.



In this workflow we will:

The workflow is triggered, & a branch will be added to check if the approver is either "**Not HJ Petro**" or "**Primary Contact**," & if the approver is "HJ Petro."



After this check, the enrolled contact proceeds to the related action.

If the "**Not HJ Petro**" or "**Primary Contact**" criteria are matched, then proceed with the specified action.

In these actions, we will:

- Get the Information
- Create a Marketing Email Link
- Create a Marketing Email Button
- Update the Approver/Consultant Contact with the Marketing Email Link

If the "**HJ Petro**" criteria are matched, then proceed with the specified action.

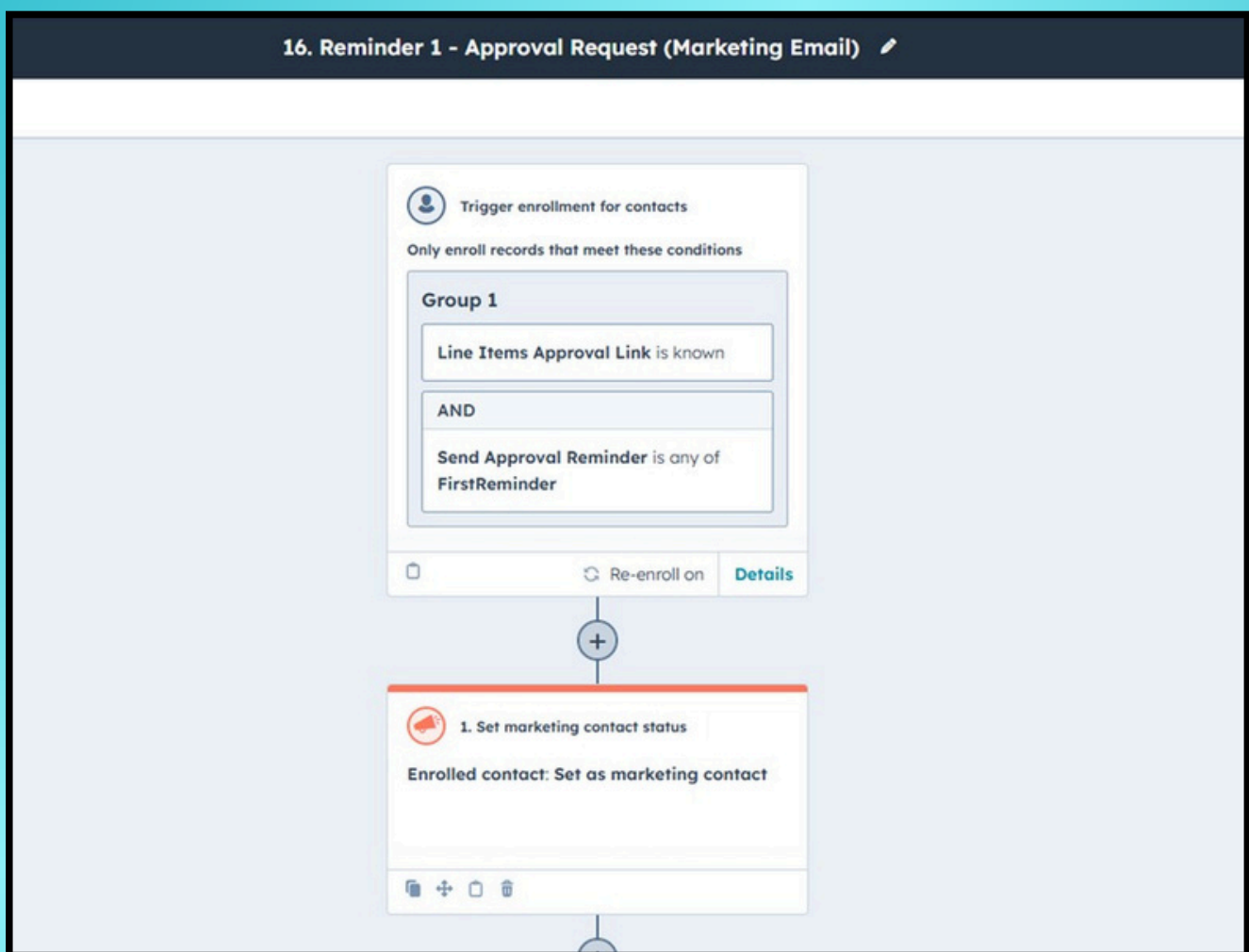
In these actions, we will:

- Get the Information
- Create Links for Internal Email Notification
- Update the Approver from H&J with Internal Notification Links

After this, another workflow is triggered based on the Contact (Approver) properties.

Workflow Name: 16. Reminder 1 - Approval Request (Marketing Email)

The workflow is triggered when the properties mentioned in the screenshot are changed.



In this workflow we will:

Set the contact as a marketing contact, then add a branch if the Approval Request Type is either "**Approval request for customer**" or "**Approval request for H&J Petroleum.**"

If the "**Approval request for customer**" criteria are matched, then proceed with the specified action.

In these actions, we will:

Send the email (**Reminder 1 - Consultant Timesheet Approval Request**), including the consultant's timesheet, then clear the Approval Request Type, Line Items Approval Link, and Send Approval Reminder properties.

If the "**Approval request for H&J Petroleum**" criteria are matched, then proceed with the specified action.

In these actions, we will:

Send the email (**HJ Petroleum - Reminder 1 - Request for Approval**), including the consultant's timesheet, then clear the Approval Request Type, Line Items Approval Link, and Send Approval Reminder properties.

After this, if the consultant does not take any action within 2 days, another reminder email will be sent again.

Workflow Name: 17. Reminder 2 - Consultant Approval Request

This workflow functions the same way as previously [15] explained.

Workflow Name: 18. Reminder 2 - Approval Request (Marketing Email)

This workflow functions the same way as previously [16] explained. But In this workflow we send 2nd reminder email in both actions.

Workflow Name: 19. Reminder 3 - Consultant Approval Request

This workflow is used for the final reminder for the Consultant Approval

Workflow Name: 20. Reminder 3 - Approval Request (Marketing Email)

send the last reminder email (**HJ Petroleum - Reminder 3 - Request for Approval**) to the consultant for approval. After that, clear the **Approval Request Type** and **Line Items Approval Link** and “**Send Approval Reminder**” contact properties.

After this we have received the response. **Form Name: Customer Approval**

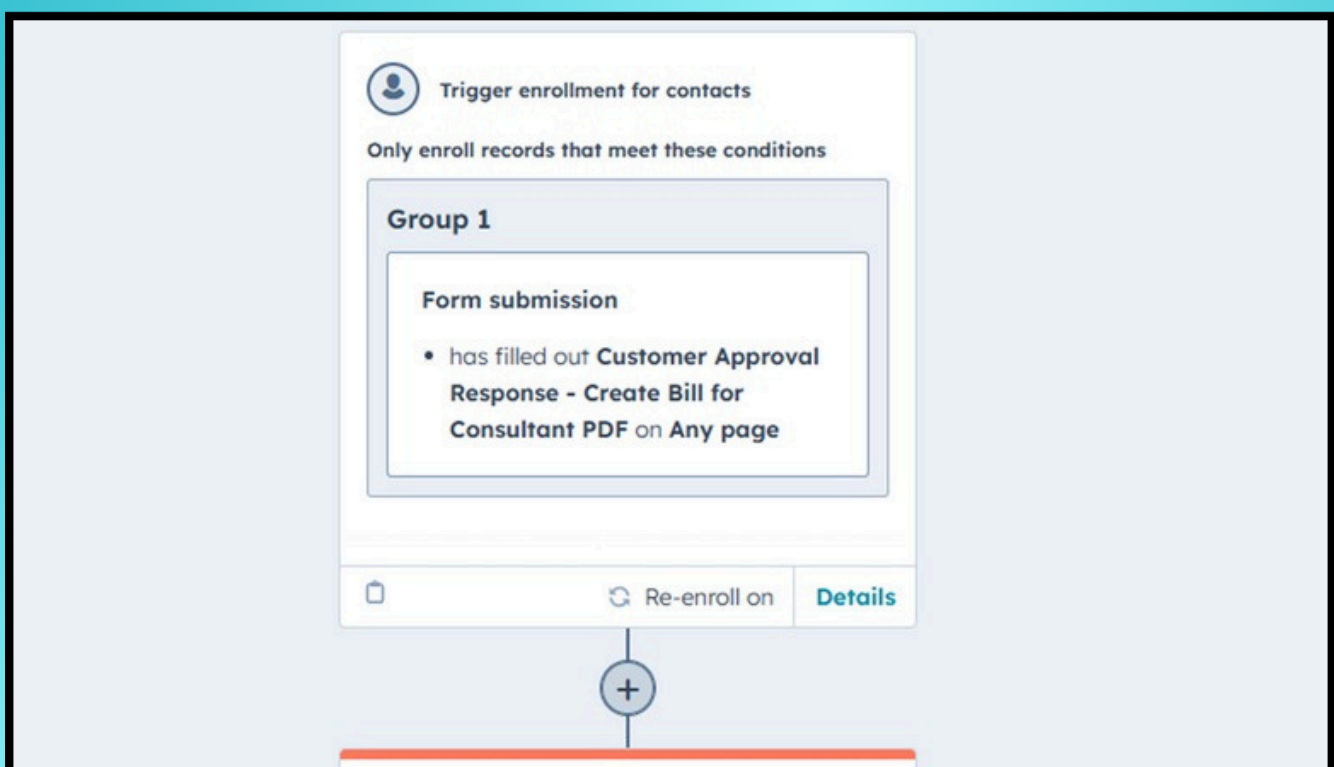
Response - Create Bill for Consultant
PDF

This form is used on the website and in the workflow.

Website: <https://hjpetro-1230608.hs-sites.com/field-ticket-for-approval-step-03>

Workflow Name: 21. Customer Approval Response

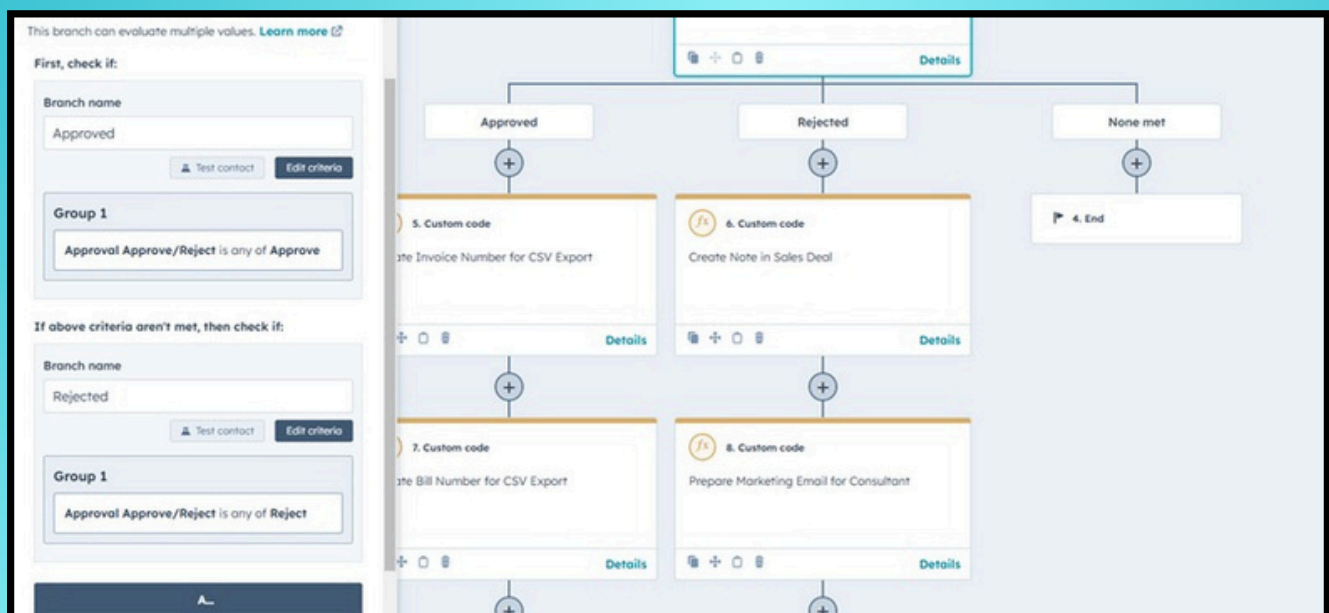
Upon the form submission workflow is triggered.



In the workflow we will:

Set the contact as a marketing contact, then execute the Custom Code Action to update the Approval Object Record Status. After that, update the Line Item Status in the Timesheet Object as either Approved or Rejected.

Based on the Approval status, add a branch for Approved or Rejected, each leading to a specified action.



If Status is Approved then proceed with the specified action:

- Create Invoice Number for CSV Export
- Create Bill Number for CSV Export
- Create Field Ticket PDF
- Create Bill for Consultant
- Send Email (Send Approved Field Ticket)
- Create Note and Attach Approved Field Ticket to Note and Sales Deal, Then Send Notification to the Deal Owner
- Prepare Marketing Email for Consultant and Attach Approved Timesheet
- Send Email (Customer Response for HJ - Approved)

If Status is **Rejected** then proceed with the specified action:

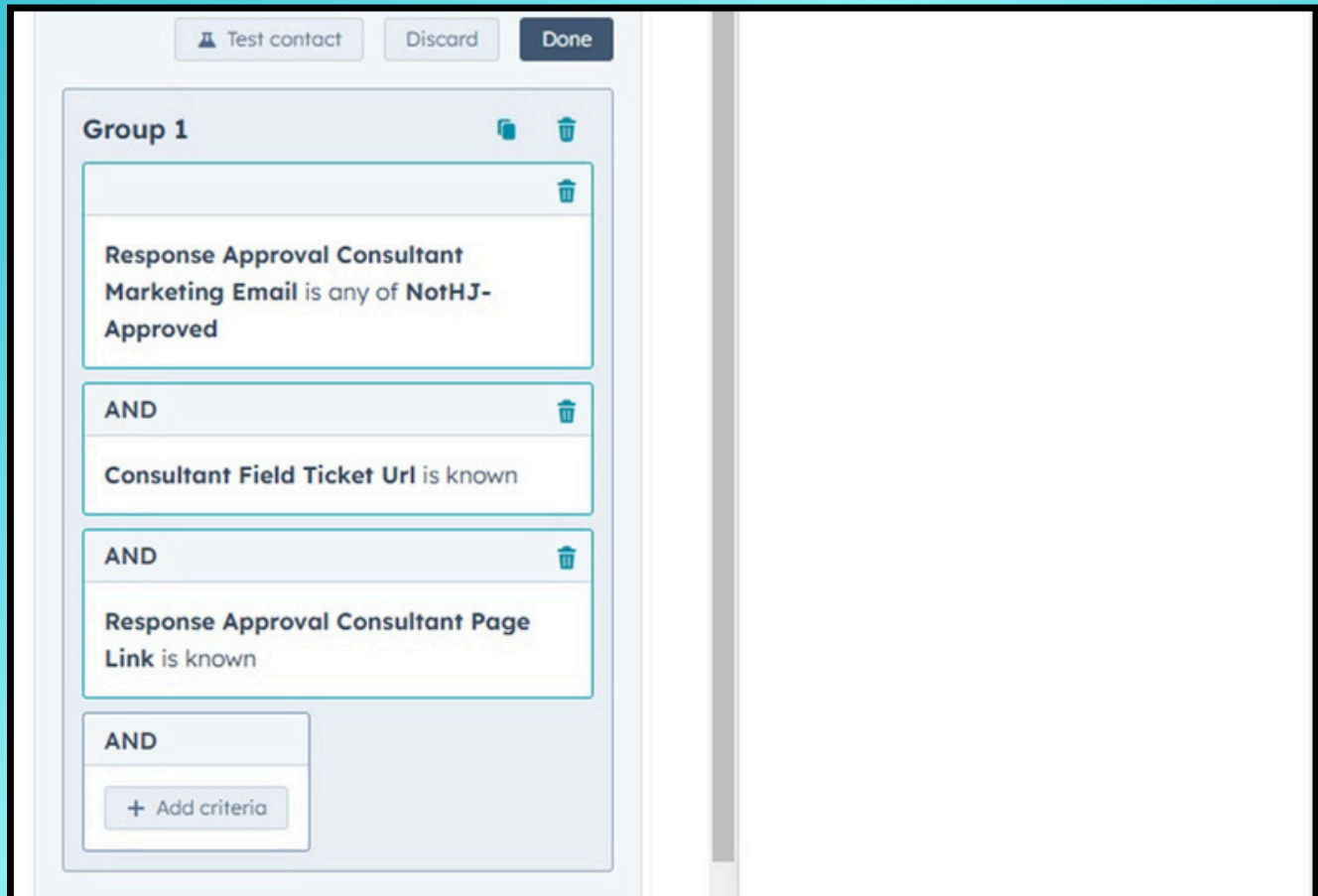
- Create a Note in the Sales Deal
- Prepare a Marketing Email for the Consultant
- Send Email – (Customer Response for HJ - Rejected)

After this if Response for consultant is approved then,

Workflow Name: 22.

Customer Approval Response for Consultant - APPROVED Marketing Email

The workflow is triggered when the properties specified in the screenshot are identified.

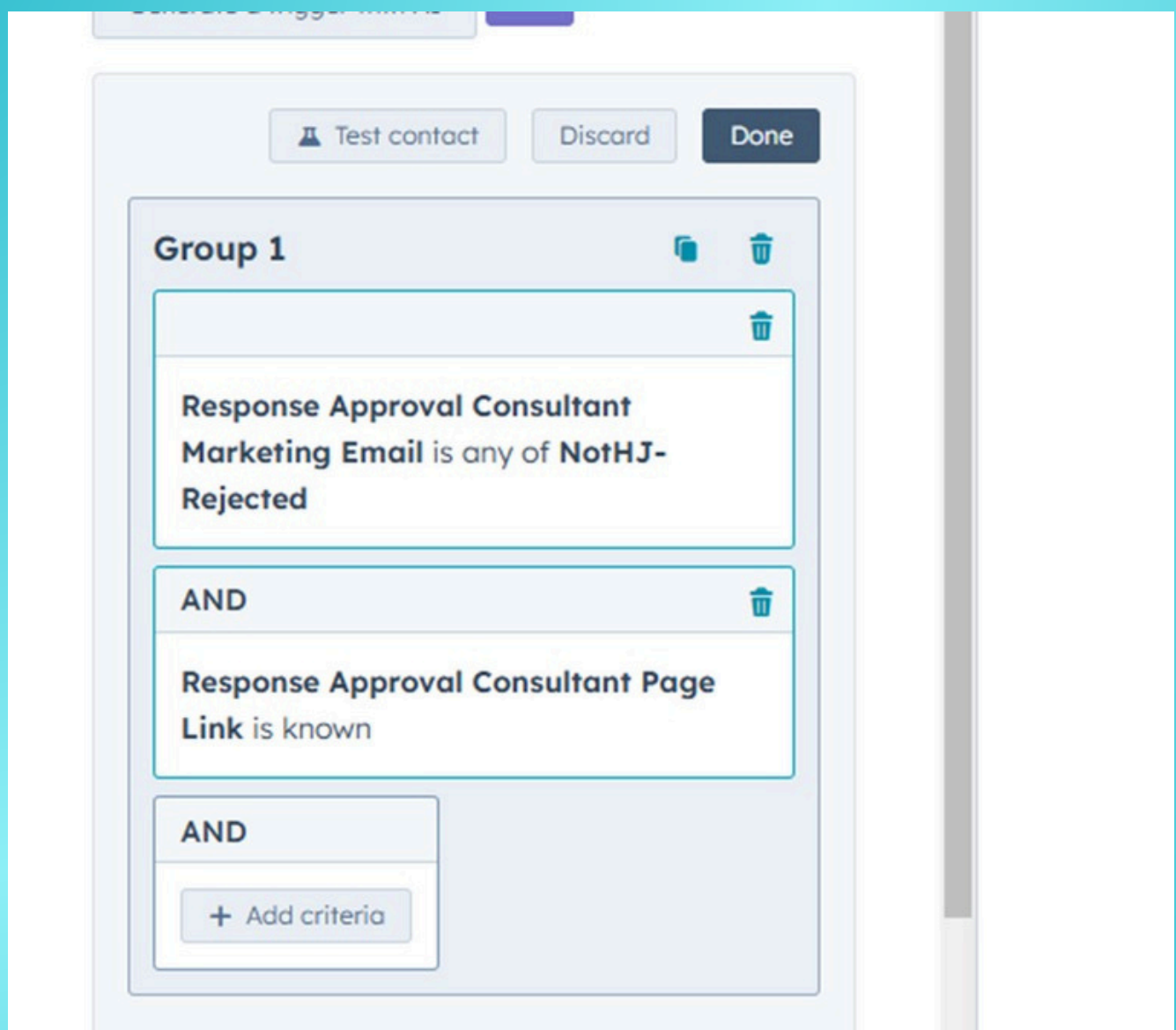


In this workflow we will: Send the "**Customer Response for Consultant - Approved**" email to the

consultant and clear the properties mentioned in the screenshot above. After this if Response for consultant is rejected then

Workflow Name: 23. Customer Approval Response for Consultant - REJECTED Marketing Email

The workflow is triggered when the properties specified in the screenshot are identified.



In this workflow we will:

Send the "**Customer Response for Consultant - Rejected**" email to the consultant & clear the properties "**Response Approval Consultant Marketing Email**" and "**Response Approval Consultant Page Link**".

After this if consultant want to reapprove the request then

Form Name: Consultant Re-Approval Request

This form is used on the website and in the workflow.

Website:

<https://hjpgetro-1230608.hs-sites.com/request-for-line-items-re-approval-01>

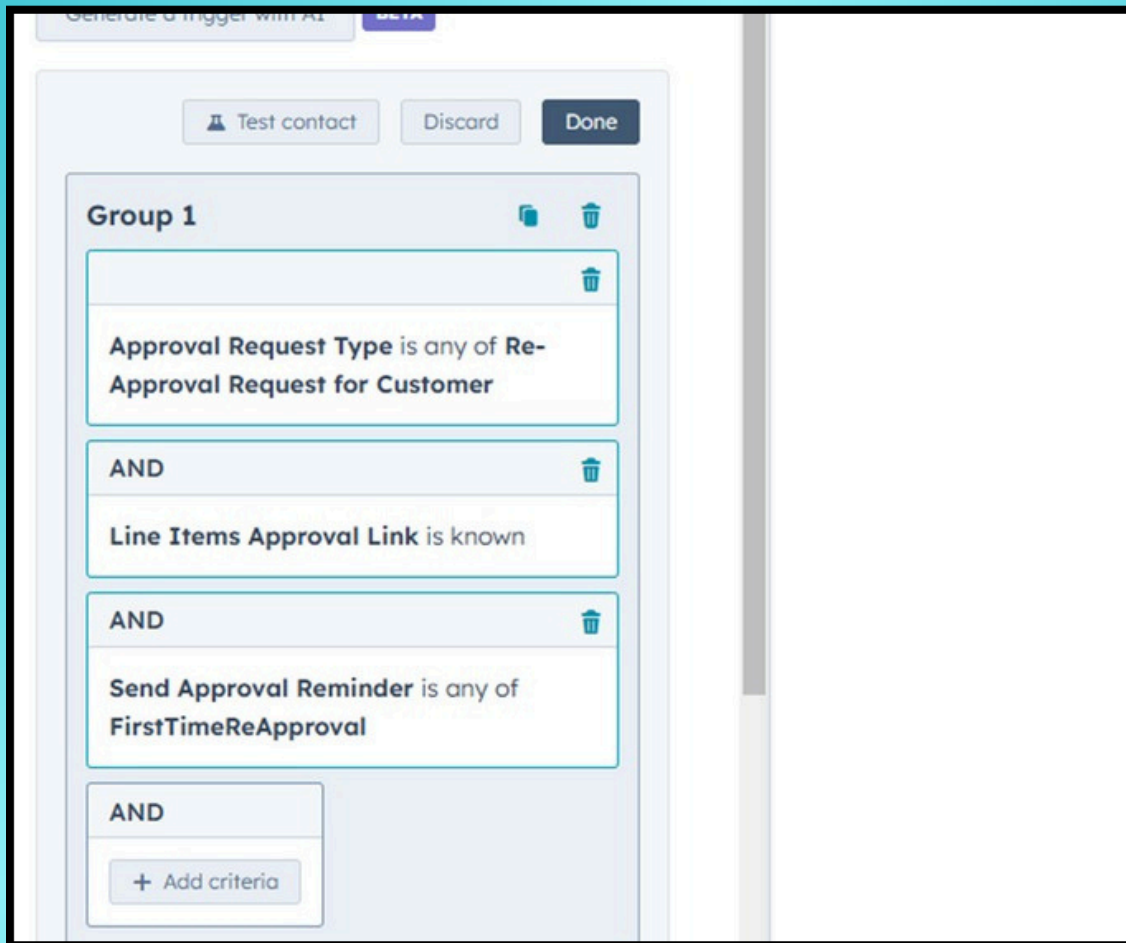
<https://hjpgetro-1230608.hs-sites.com/request-for-line-items-approval-01>

Workflow Name: 24. Consultant Re-Approval Request

This workflow functions the same way as previously [13] described.

Workflow Name: 25. Re-Approval Request - CUSTOMER (Marketing Email)

The workflow is triggered when the properties specified in the screenshot are identified.



In this workflow we will:

Send the "**Customer Response for Consultant - Rejected**" email to the consultant & clear the properties "**Response Approval Consultant Marketing Email**" and "**Response Approval Consultant Page Link**". After this if consultant want to reapprove the request then

Form Name: Consultant Re-Approval Request

This form is used on the website and in the workflow.

Website:

<https://hjpgetro-1230608.hs-sites.com/request-for-line-items-re-approval-01>

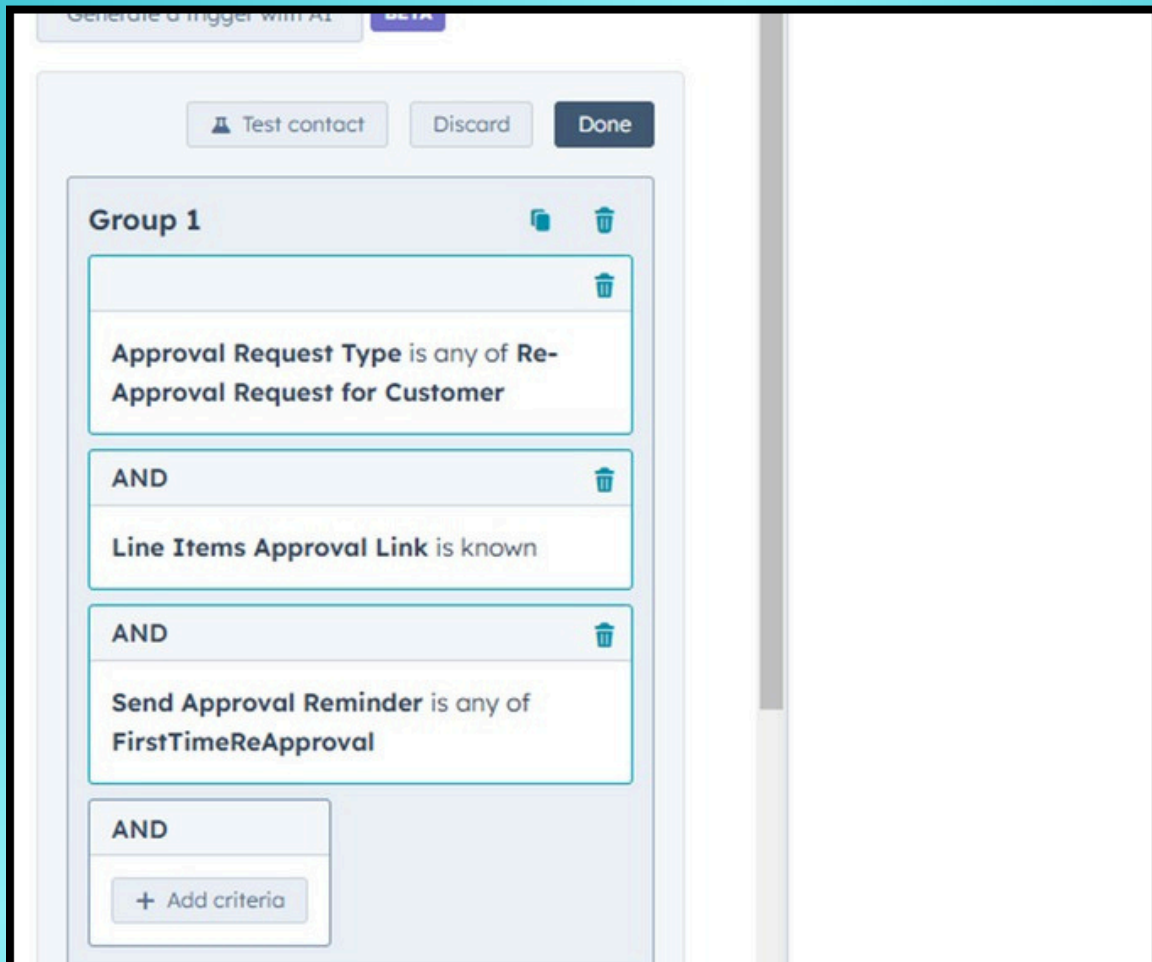
<https://hjpgetro-1230608.hs-sites.com/request-for-line-items-approval-01>

Workflow Name: 24. Consultant Re-Approval Request

This workflow functions the same way as previously [13] described.

Workflow Name: 25. Re-Approval Request - CUSTOMER (Marketing Email)

The workflow is triggered when the properties specified in the screenshot are identified.



In this workflow we will:

Send the "**Consultant Timesheet Re-Approval Request**" email to the consultant and clear the properties "**Approval Request Type**" and "**Line Items Approval Link**". **Form Name: H&J Approval Response -**

Create Bill for Consultant PDF

This form is used on the website and in the workflow.

Website:

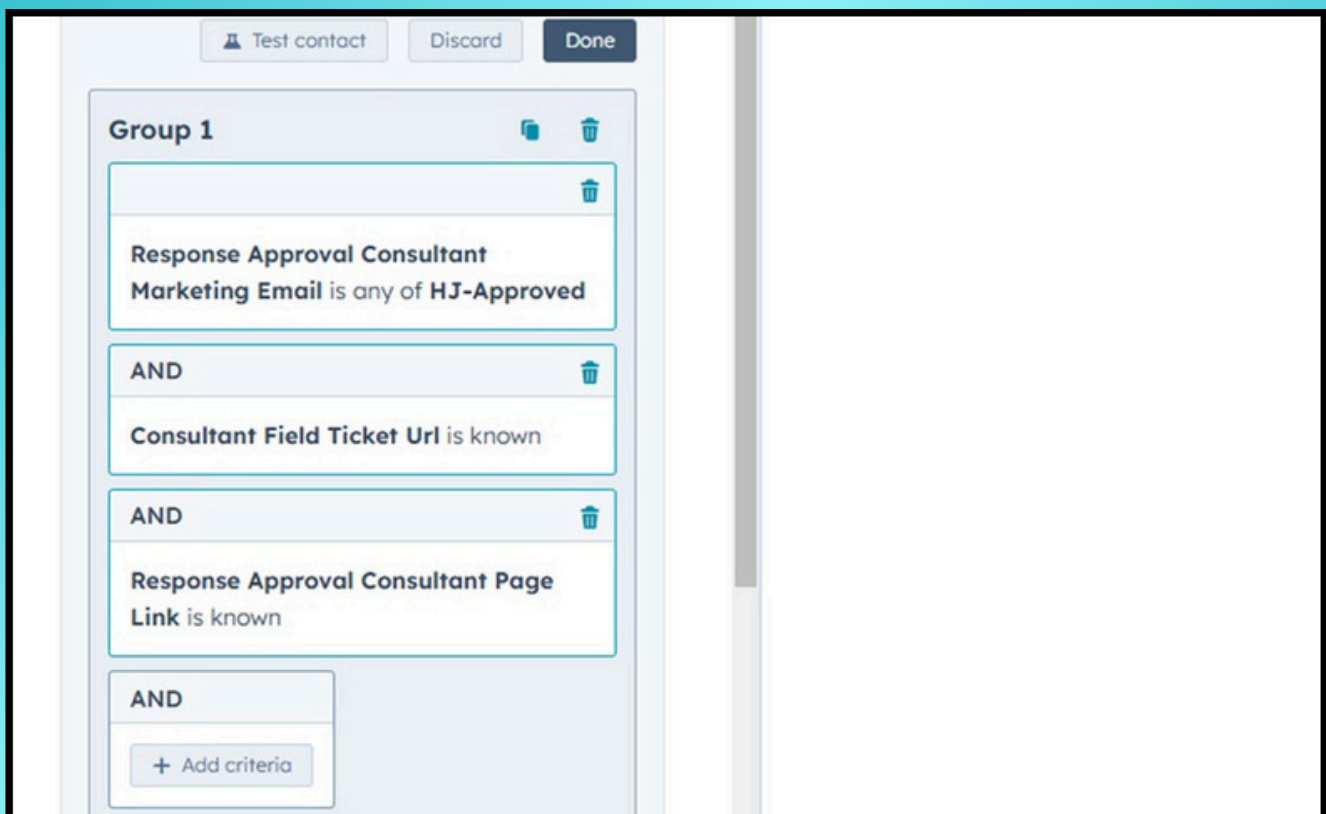
<https://hjetpro-1230608.hs-sites.com/field-ticket-for-approval-step-03>

Workflow Name: 26. H&J Approval Response

This workflow functions the same way as previously [21] described.

Workflow Name: 27. H&J Approval Response for Consultant - APPROVED Marketing Email

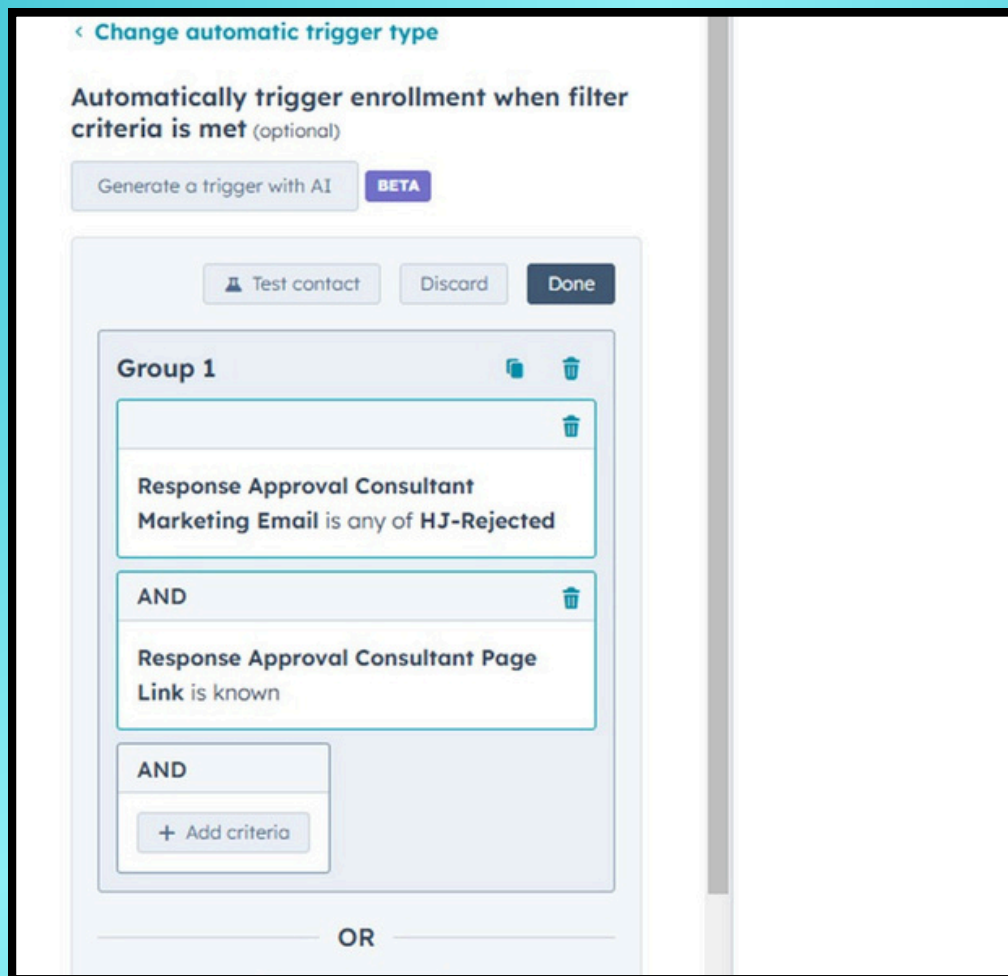
The workflow is triggered when the properties specified in the screenshot are identified.

**In this workflow we will:**

Send the "H&J Petroleum Response for Consultant - Approved" email to the consultant and clear the properties "Response Approval Consultant Marketing Email" and "Consultant Field Ticket Url" and "Response Approval Consultant Page Link".

Workflow Name: 28. H&J Approval Response for Consultant - REJECTED Marketing Email

The workflow is triggered when the properties specified in the screenshot are identified.



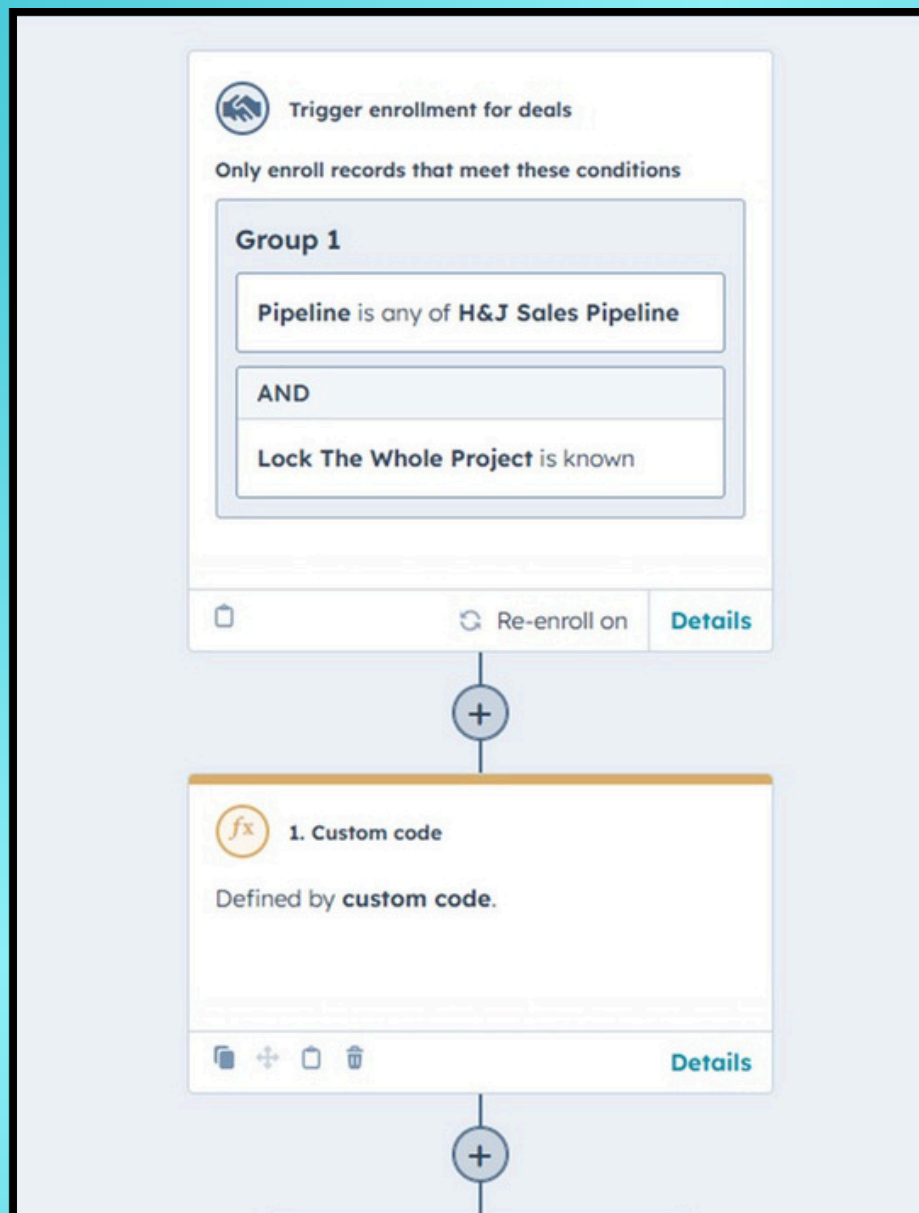
In this workflow we will:

Send the "H&J Petroleum Response for Consultant - Rejected" email to the consultant and clear the properties "Response Approval Consultant Marketing Email" "Response Approval Consultant Page Link".

Workflow Name:

29. Lock The Whole Project

This workflow is deal-based and is triggered when the pipeline is set to "H&J Sales Pipeline" and the "Lock the whole project" field is known. Within the workflow, a custom code action is added.



In custom code action we will

Retrieve the deal information, then update the custom object "**Project.**"

Form Name: Join Our Team HS

This form is used on the website and in the workflows.

Website:

<https://www.hjpetro.com/join-our-team-contact>

Workflows:

1. Send a follow-up email after form submission
2. H&J | Send Reference Check Questions
3. H&J New Consultant Applicant Pipeline 1
4. H&J New Consultant Applicant Pipeline 1 (v2)
5. H&J | Create and Associate Reference Contacts after Form Submission
6. Join Our Team form Submission - Jon & Daria

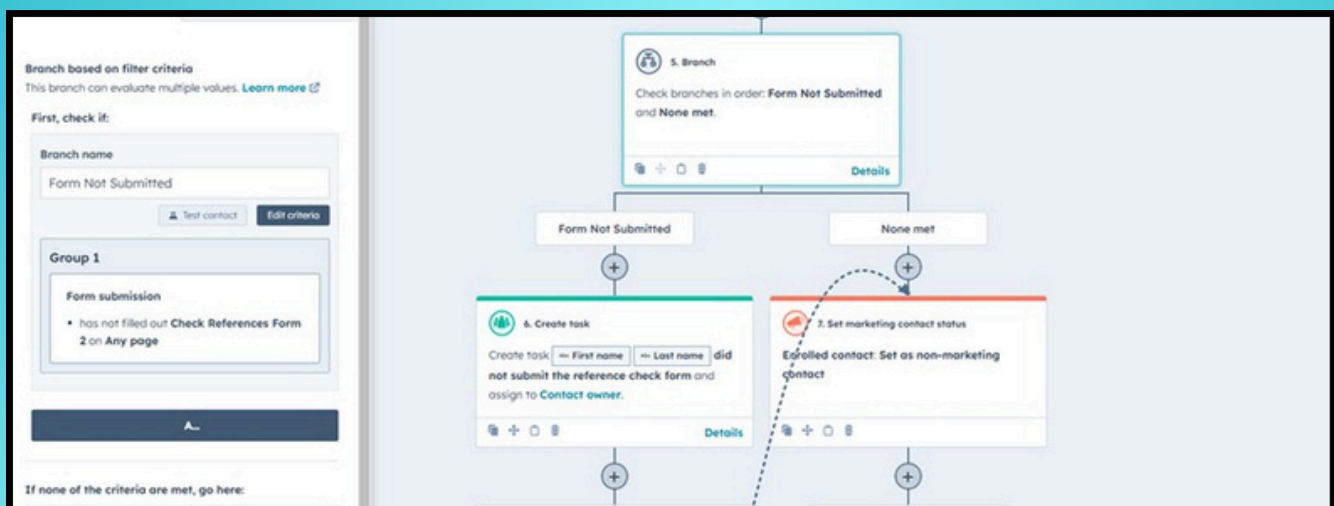
Workflow Name: Send a follow-up email after form submission

Workflow is off.

Workflow Name: H&J | Send Reference Check Questions

Upon form submission, the workflow will be triggered as follows:

1. Set the contact as a marketing contact.
2. Send the email "H&J Reference Check Request Form - Send to References", which includes the "Check References Form 2" Form (This form is used for reference checks and is also part of a workflow, though the workflow is currently inactive.).
3. Introduce a 7-day delay.
4. Add a branch to check whether the form has been submitted or not.



- If the form is submitted, proceed as needed.
- If the form is not submitted, create a task and assign it to the contact owner, then set the contact status as a non-marketing contact.

Workflow Name: H&J New Consultant Applicant Pipeline 1

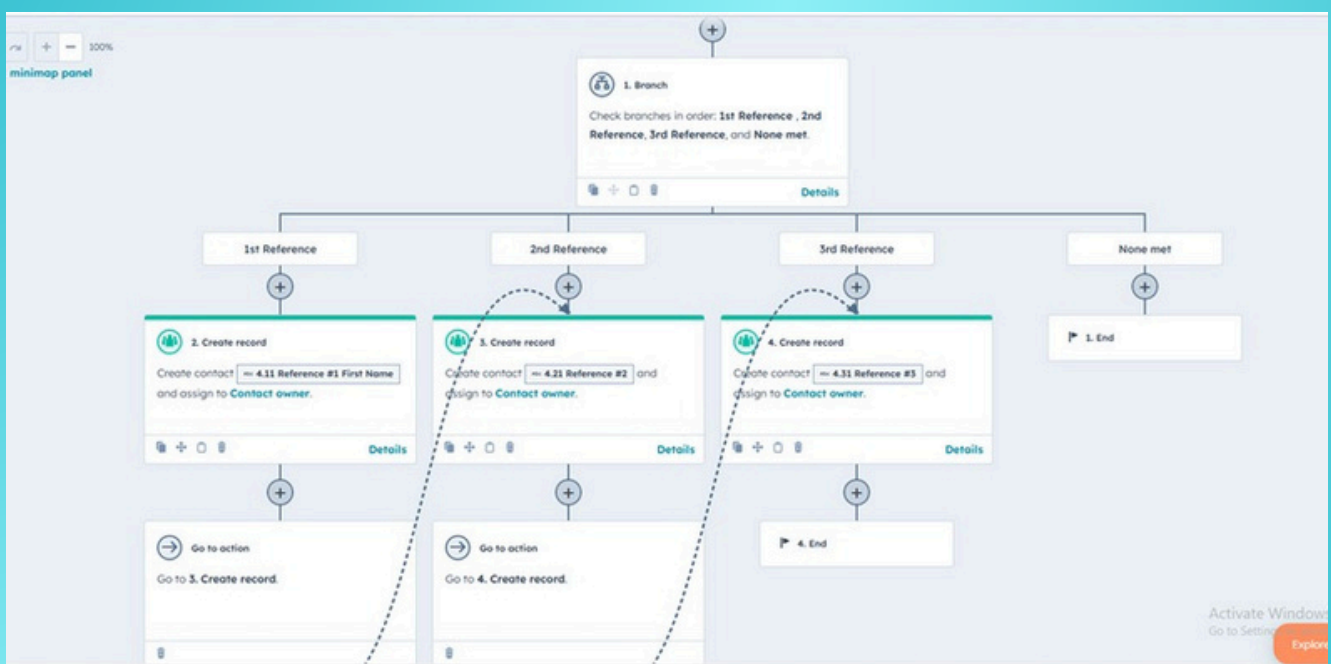
Workflow is off.

Workflow Name: H&J New Consultant Applicant Pipeline 1 (v2)

Workflow is off.

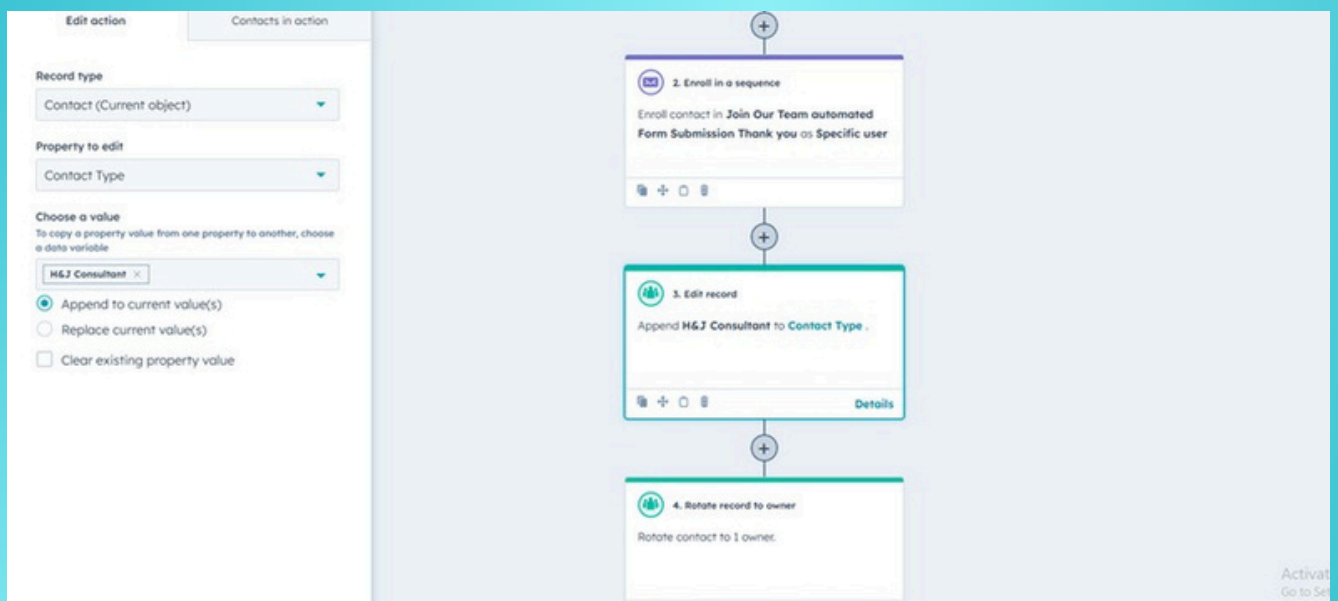
Workflow Name: H&J | Create and Associate Reference Contacts after Form Submission

When the form is submitted, the workflow is triggered. In this workflow, a contact is created in HubSpot based on the reference value, and an owner is assigned.



Workflow Name: Join Our Team form Submission - Jon & Daria

When the form is submitted, the workflow is triggered. In this workflow, we enroll the sequence "**Join Our Team Automated Form Submission Thank You.**" As part of this sequence, we send the form "**H&J Consultant Pipeline - Screener Form**" to users. This form is used in workflows, but the workflow is currently inactive.



- We update the Contact Type property to H&J Consultant and assign an owner.
- A deal is created in the Lead Stage of the H&J Recurring Pipeline.

Form Name: Consultant - Reference Request Update

This form is used in the workflow I have already explained above. **Form**

Name: H&J Ignite form to previous attendees (direct email)

This form is used in workflows

1. Sequence 267829148 automation - Fri Jan 17 2025 13:40:09 GMT-0700
2. Sequence 103181465 automation - Mon Aug 05 2024 17:08:43 GMT-0500
3. Sequence 103179532 automation - Mon Aug 05 2024 17:02:51 GMT-0500
4. H&J Ignite Feb 25 Form submission

This form is utilized in the three workflows mentioned above. These workflows are used to Unenroll the contact from the sequence.

Workflow Name: H&J Ignite Feb 25 Form submission

Upon form submission, the workflow is triggered. In this process, we will:

- Set the contact as a marketing contact.
- Add a branch to check whether the contact is associated with any payment.

The screenshot shows a web interface for configuring a branch. At the top, it says 'Branch based on filter criteria' with a link to 'Learn more'. Below this, it says 'First, check if:'. The main configuration area is titled 'Branch name' and contains a text input field with 'Payment Secured'. To the right of this field are two buttons: 'Test contact' (with a person icon) and 'Edit criteria'. Below the 'Branch name' section is a section titled 'Group 1'. Inside 'Group 1' is a box containing two criteria: 'Contact is associated to: Any Payment' and 'And associated Payment has all of: Payment date is known'. Below the 'Group 1' section is a large dark blue button with the text 'A...'. At the bottom, there is a section titled 'If none of the criteria are met, go here:'. This section contains a 'Branch name' label and a text input field with 'Payment not secured'.

If the criteria are met, proceed to the specified action. In this action we will:

- Edit the record & append the attendee value to the H&J Ignite property.
- Update the subscription status.
- Send an email.(H&J Ignite Thank you email (January))
- Create a task and Assign the task to Matt.

If the criteria are not met, proceed to the specified action.

In this action we will:

Create a task and Assign the task to Jonathan.

Form Name: H&J Ignite RSVP/Payment February 2025 (SquareSpace)

1. Sequence 267831724 automation - Fri Jan 17 2025 13:53:31 GMT-0700
2. Sequence 267825460 automation - Fri Jan 17 2025 14:30:06 GMT-0700
3. H&J Ignite Feb 25 Form submission

This form is utilized in the two workflows mentioned above. These workflows are used to Unenroll the contact from the sequence.

Workflow Name: H&J Ignite Feb 25 Form submission

This workflow has already been described above.

Form Name: H&J Consultant Emergency Contact Form

This form is not being used in any workflow or website. Instead, users submit the form directly through the link.

Form Name: H&J Ignite form for future events (SquareSpace)

1. Sequence 103179532 automation - Mon Aug 05 2024 17:07:49 GMT-0500
2. Sequence 103181465 automation - Mon Aug 05 2024 17:08:56 GMT-0500
3. H&J Ignite "Future Events" Form

This form is utilized in the two workflows mentioned above. These workflows are used to Unenroll the contact from the sequence.

Workflow Name: H&J Ignite "Future Events" Form

Upon form submission, the workflow is triggered. In this process, we will:

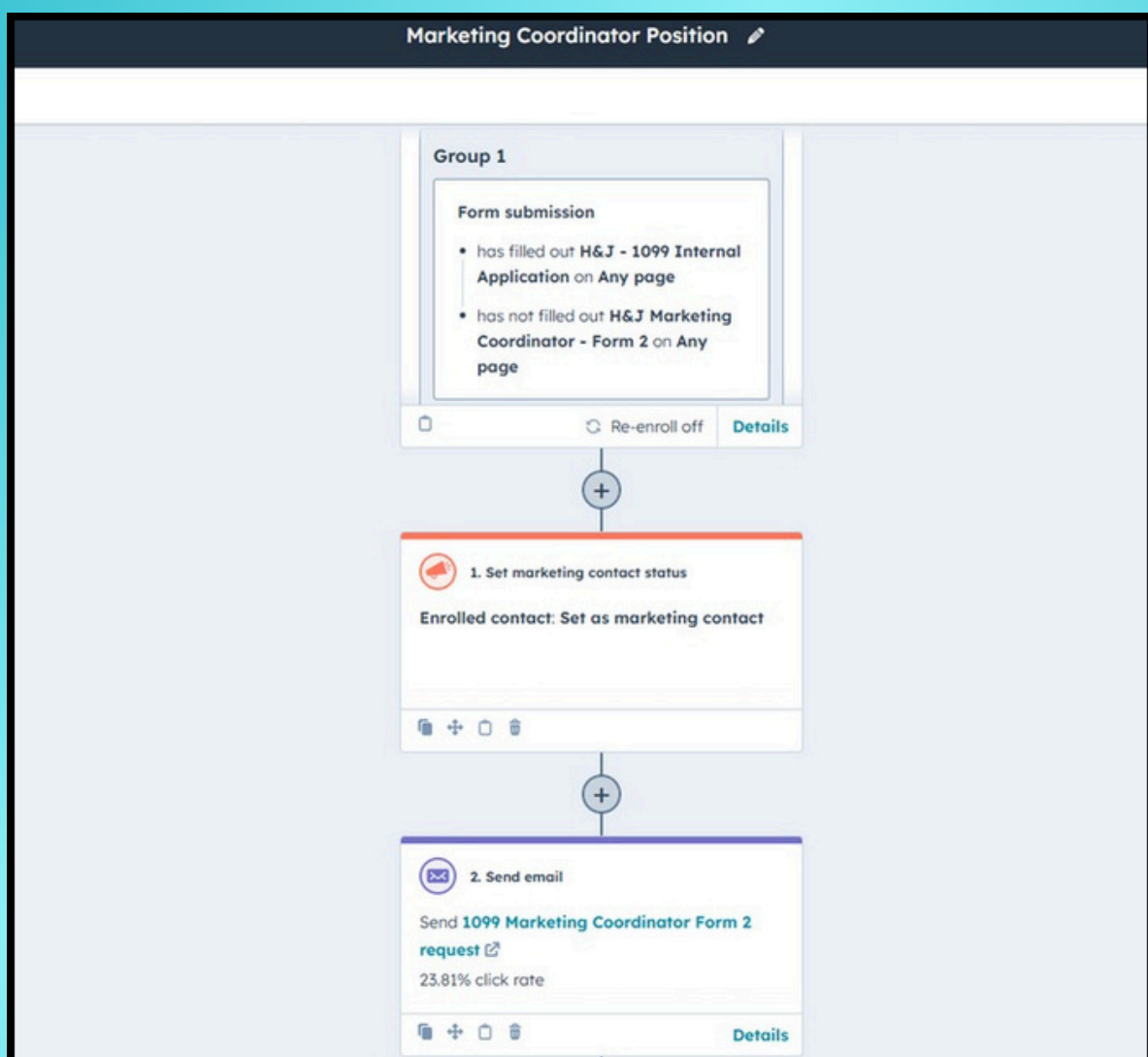
1. Set the contact as a marketing contact.
2. Edit the record and append the Invitee value to the H&J Ignite property.
3. Create a task and assign no one.

Form Name: H&J Marketing Coordinator - Form 2

This form is used in workflows.

1. Marketing Coordinator Position
2. 1099 Marketing Coordinator Applicant Workflow (Workflow is off)

Workflow Name: Marketing Coordinator Position



Upon form submission, the workflow is triggered:

1. Set the contact as a marketing contact.
2. Send an email (1099 Marketing Coordinator Form 2 Request) to enroll the contact. This email contains a form for the user to complete.
3. Add a 1-day delay.
4. Add a branch to check whether the form has been submitted or not.

Branch based on filter criteria
This branch can evaluate multiple values. [Learn more](#)

First, check if:

Branch name
Marketing Coordinator Form 2 Completion

[Test contact](#) [Edit criteria](#)

Group 1

Form submission

- has filled out **H&J Marketing Coordinator - Form 2** on **Any** page

A...

If none of the criteria are met, go here:

Branch name
None met

If the criteria are met, proceed to the specified action:

1. Send a thank you email. (**Marketing Coordinator Form 2 Thank You and Update**)
2. Set the contact status as non-marketing contact.

If the criteria are not met:

- 1) Send a reminder email (**H&J - Marketing Coordinator Quiz Reminder**) to enroll the contact. This email contains a form for the user to complete.
- 2) Add a 1-day delay.
- 3) Add a branch to check whether the form has been **submitted** or not.

This process repeats three times:

1. If the user submits the form, send a **thank you email**.
2. If the user does not submit the form, **send a reminder email** again.

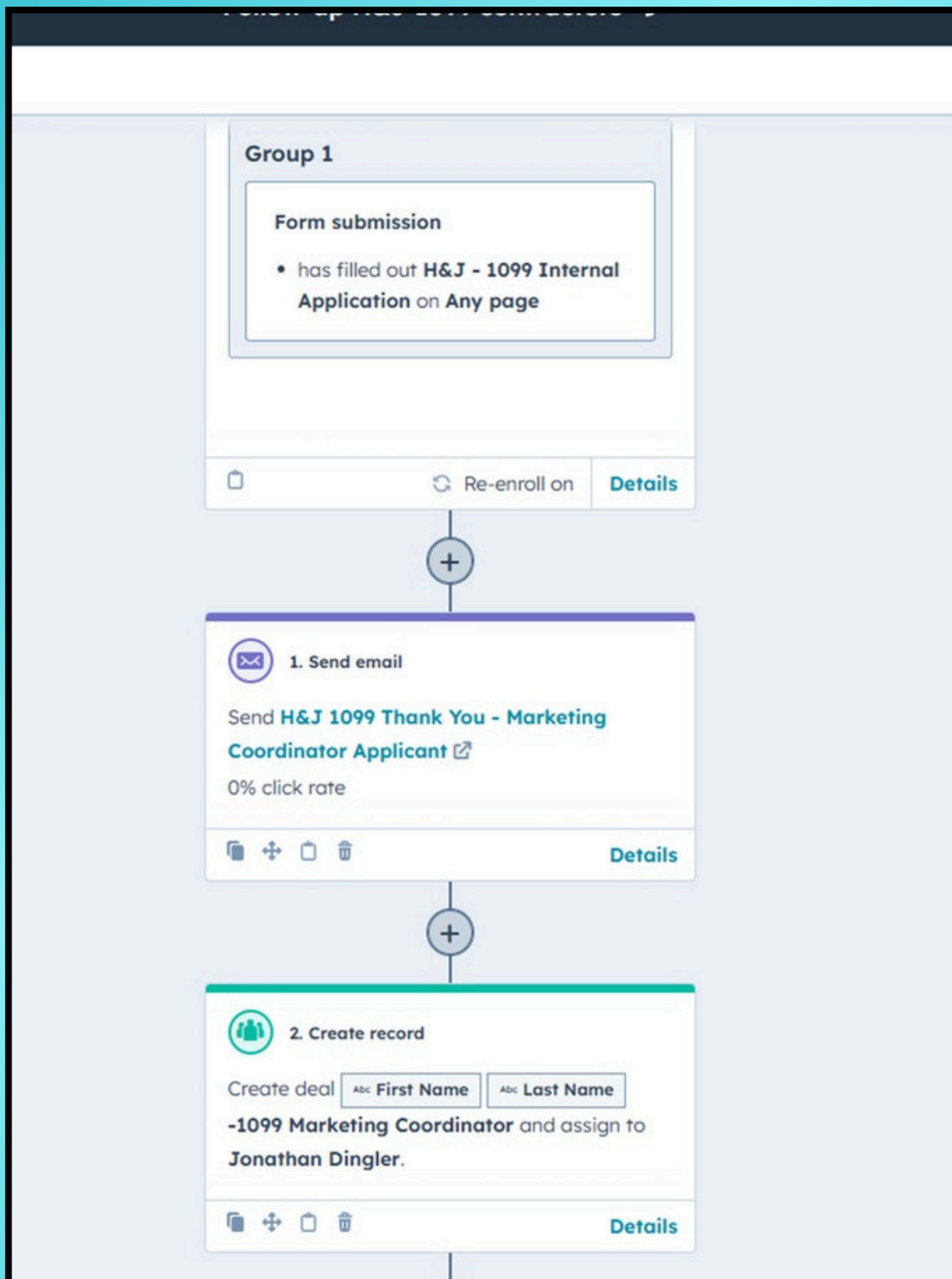
Form Name: H&J - 1099 Internal Application This form is used in workflows

1. Marketing Coordinator Position
2. Follow-up H&J 1099 contractors

Workflow Name: Marketing Coordinator Position

This workflow has already been described above.

Workflow Name: Follow-up H&J 1099 contractors



Upon form submission, the workflow is triggered to:

1. Send a **thank you email (H&J 1099 Thank You - Marketing Coordinator Applicant)** to the user.
2. Create a **deal** and assign it to **Jonathan**.
3. Send another email (**Self-Assessment Request**).

Form Name: Customer Approval Response - Main Form

This form is only used on the website.

<https://hjpetro-1230608.hs-sites.com/field-ticket-for-approval-step-01>

Form Name: Well Control - Consultant Compliance Record

This form is used in workflows

- Well Control Certification - Master WF (Workflow is off)
- Well Control Certification - Master WF (jon's edits) (Workflow is off)
- Well Control Submission Follow up email

Workflow Name: Well Control Submission Follow up email

Upon form submission, the workflow is triggered to:

1. **Send an email (Well Control Form Submission) to the user.**
2. **Create a task and assign it to Jon-Lucas Poe.**

Form Name: Customer Approval Response - Create Approved Field Ticket PDF

This form is only used on the website.

<https://hjpetro-1230608.hs-sites.com/field-ticket-for-approval-step-02>

Form Name: Prepare Consultants

This form is only used on the website.

<http://hjpetro-1230608.hs-sites.com/prepare-consultants-02>

<http://noboundsdigital-2662050.hs-sites.com/hjpetro-start-new-project-01>

Form Name: Consultant Fun Facts - Appreciation

This form is not used on the website or in any workflow; it is submitted directly through the provided link.

Form Name: H&J devo sign up form

This form is not used on the website or in any workflow; it is submitted directly through the provided link.

Form Name: H&J - General Internal Application

This form is used in workflow

Workflow Name: Send a follow-up email after form submission

Upon form submission, the workflow is triggered to:

- Send a thank you email (H&J 1099 Thank You - Marketing Coordinator Applicant) to the user.
- Create a deal and assign it to Jonathan.

Send another email (Self-Assessment Request).

Form Name: Update Timesheet

This form is only used on the website.

<http://hjpgetro-1230608.hs-sites.com/hjpgetro-start-new-project-04>

<http://hjpgetro-1230608.hs-sites.com/update-timesheet-step-05>

Form Name: H&J Ignite RSVP- September 2024

This form is not used on the website or in any workflow; it is submitted directly through the provided link.

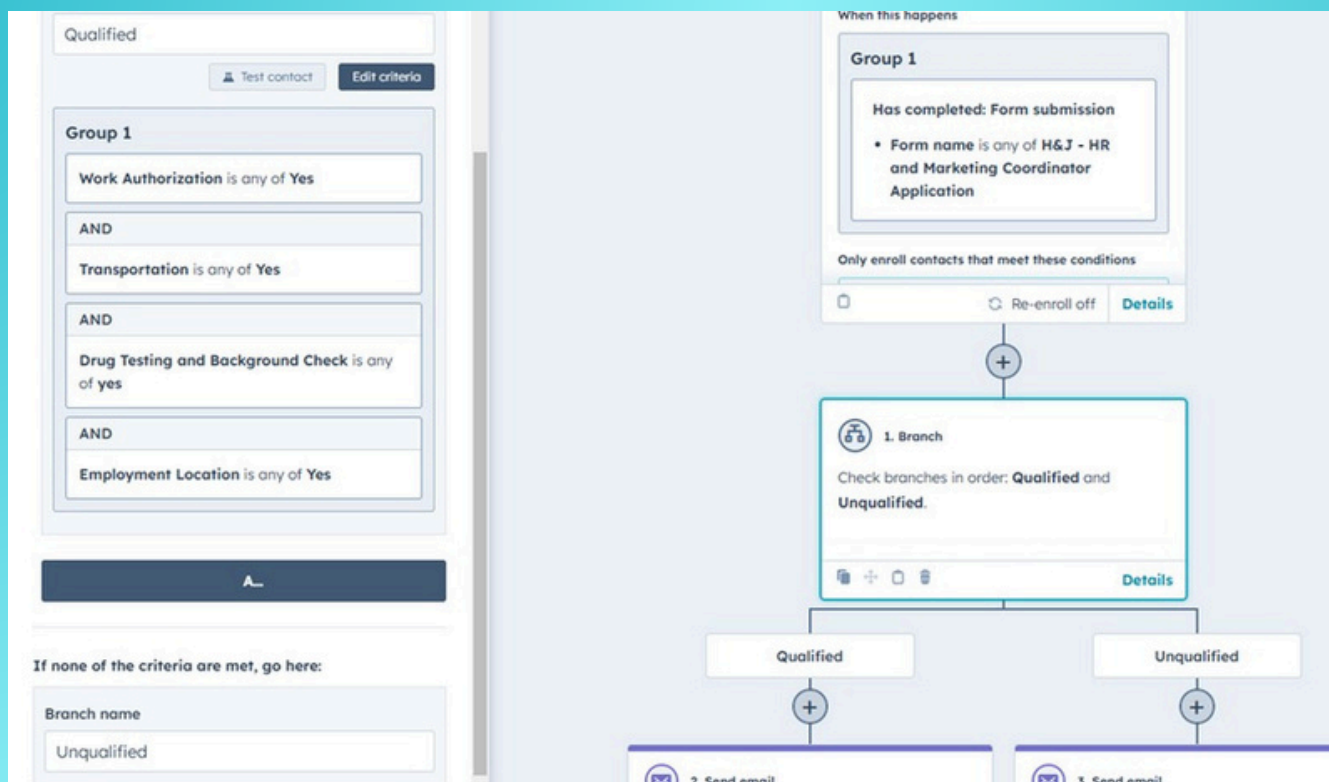
Form Name: H&J - HR and Marketing Coordinator Application

This form is used in workflow **Workflow Name:** H&J HR

Coordinator Initial Applicants

Upon form submission, the workflow is triggered to:

1. Add a branch to determine whether the lead is **qualified** or **not** based on the properties mentioned in the screenshot.



If the criteria are met, proceed to the specified action:

- Send an email.(H&J HR and Marketing Coordinator - Initial Pass)
- Create a deal in the Passed Application Screener Questions stage (H&J HR & Marketing Coordinator Applicants) and assign it to Daria.
- Add the contact to the static list (H&J HR and Marketing Coordinator).
- Create a task and assign it to Daria.
- Update the H&J HR and Marketing Coordinator Applicant Status property to Passed to Screener Call.

If the criteria are not met,

- Send an email. **(HR Coordinator Initial Rejection)**
- Add the contact to the static list **(HR Coordinator Rejections)**.
- Create a deal in the stage Rejected **(H&J HR and Marketing Coordinator Applicants)** and assign it to **Daria**.

Form Name: Your H&J Story (Revision)

This form is used on the website and in the workflows.

Website: www.hjpetro.com/yourstory

Workflow Name: People of H&J

But the workflow is off.

Form Name: Your H&J Story

This form is used on the website.

Website: www.hjpetro.com/yourstory

Changes the flow:

The issue we were facing with our timesheet PDF was that when there were too many line items, it would throw an "exceed limit" error. To overcome this, we started sending a request to an external server to generate the PDF there and then saved the PDF URL in the properties.

Workflow Name ⇒ 21. Customer Approval Response

If the error is

SCOPE OF WORK APPROVAL

Project Name: Firebird Energy - 2025 Drilling Campaign
Customer: FireBird Energy II LLC
Operator: FireBird Energy II LLC
Consultant: TJ Smith

There are no Services in this Scope of work to be approved

Due to When HJ consultants approval is Pending.

One well attached with one project User can create multiple scope of work and send to debbie and debbie approved multiple in single time for same user

Scope of work attached with single well.

- Setup sandbox as well
- Upgrade all the node versions
- Use batch api to create timesheet

If a consultant is not visible in the projects, it likely means that the value in the 'hj_notify_project_object_id' property under the contact is incorrect.

I have implemented functionality so that when the AFE number is updated in HJ Wells, it automatically updates in both HJ Consultants and Timesheets.

If the timesheet mismatch it's due to webhook. Webhook is not updated the property

The ordinal number corresponds to the line items of a consultant within a single project. Meaning, it reflects how many line items that consultant has under a specific project — and the ordinal number is generated based on that count.

Regarding the merged contact issue The ID entered in HJ Consultants will be genuine; it will not be a decrypted consultant ID.also change in sales deal recruiting deal and and contacts and timesheet

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