

The background is a solid purple color. On the left side, there are several overlapping, semi-transparent purple shapes: a large circle, a curved wedge, and a triangular wedge. On the right side, there is a large, light purple trapezoidal shape pointing towards the left.

Hello.

2017

Apps Empowered™

 **EMPOWER**


**QUICK
BASE**

Magic Buttons

A whole bunch of useful examples of what you can do with buttons

Kirk Trachy

Sr. Solutions Engineer, Quick Base

Agenda

- ① Explore 133 formula examples (I counted)
- ② Incorporate form rules with formulas
- ③ Use CSS and graphics as buttons
- ④ Alternate approval work flow
- ⑤ Add tabs to your forms
- ⑥ Make a project template selector
- ⑦ A simple tasks and sub-tasks option

Benefits

- ① Automate a complex process
- ② Provide a custom user experiences
- ③ Ease new user adoption
- ④ Save training time
- ⑤ It makes QuickBase more fun and useable
- ⑥ Looks like magic

Days	PC	Skype	Press to adjust % Completed	Performance Bar
-130 Days Due	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<div style="width: 100%; height: 10px; background-color: red;"></div>
-69 Days Due	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<div style="width: 95%; height: 10px; background-color: red;"></div> <div style="width: 5%; height: 10px; background-color: gray;"></div>
-4 Days Due	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<div style="width: 70%; height: 10px; background-color: yellow;"></div> <div style="width: 30%; height: 10px; background-color: gray;"></div>
Completed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<div style="width: 40%; height: 10px; background-color: yellow;"></div> <div style="width: 60%; height: 10px; background-color: gray;"></div>
-56 Days Due	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<div style="width: 25%; height: 10px; background-color: green;"></div> <div style="width: 75%; height: 10px; background-color: gray;"></div>
64 Days Overdue	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<div style="width: 35%; height: 10px; background-color: green;"></div> <div style="width: 65%; height: 10px; background-color: gray;"></div>

Approve

Save and Update

Submit and Notify











Call your mother

Beam me up

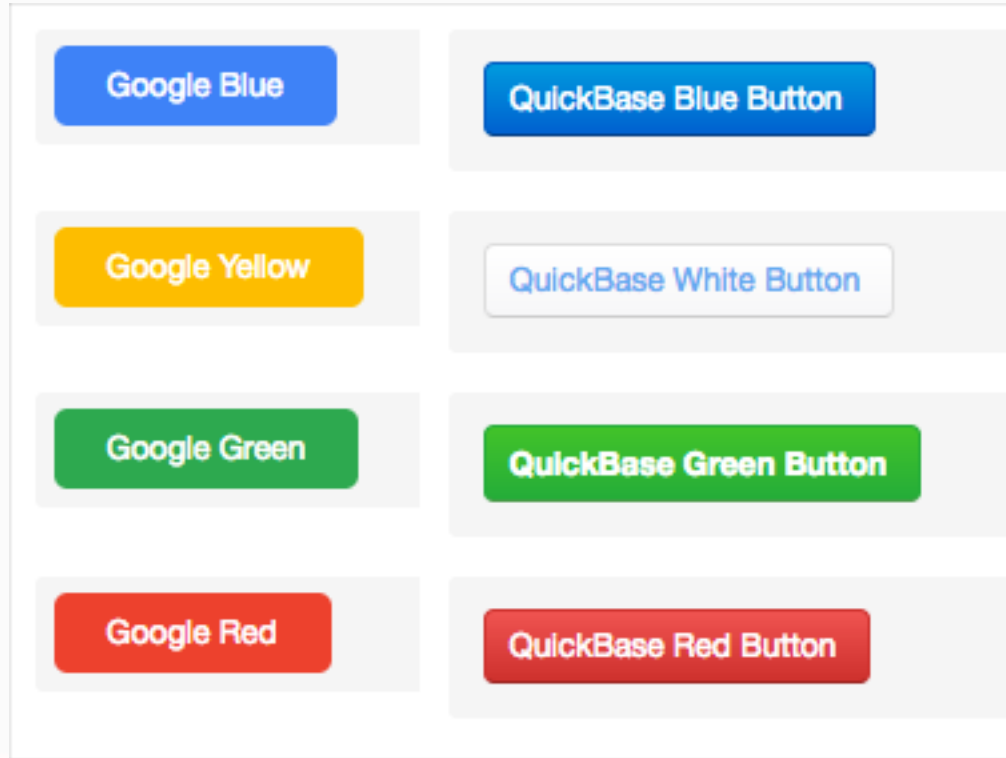
Get “Magic Buttons” from Quick Base Exchange

The screenshot shows the QuickBase Exchange interface. At the top, there's a navigation bar with 'QuickBase', 'My Apps', and user information for 'Kirk Trachy'. Below that, the search results for 'magic buttons' are displayed, showing '1 app matches your search'. A sidebar on the left lists various categories like 'Staff Picks', 'Advanced Functionality (36)', etc. The main content area features a 'Latest Quick Base Exchange Staff Picks' section with a featured app 'Extended Property Management' by Matt S., which has 45 downloads and a quote: "This is an extensive solution to tracking property management and rehab projects." Below this, the 'Magic Buttons - Having fun with formula ...' app is highlighted, showing it was published on 06-JUL-15, has 1,015 downloads, and a 5-star rating. The app description states: "This app has 50 examples of how one might use formula url fields to promote workflow within an ap ...". At the bottom of the app card, there are buttons for '+ Get this app' and 'Details'.

We can create buttons to do anything...

FORMULA URL VERSION	FORMULA TEXT VERSION	FORMULA TEXT GRAPHIC	WHAT CHANGES
<p>① 1A. Change status to completed then display record</p> <p>1A. Change status to completed then display record</p>	<p>① 1B. Change status to completed then display record</p> <p>Change status to completed then display record</p>	<p>① 1C. Change status to completed then display record</p> 	<p>① View Status Field In-Progress</p>
<p>② 2A. Change status to completed then dashboard</p> <p>2A. Change status to completed then dashboard</p>	<p>② 2B. Change status to completed then dashboard</p> <p>2B. Change Status to Completed then dashboard</p>	<p>② 2C. Change status to complete then dashboard</p> 	<p>① View Status Field In-Progress</p>
<p>3A. Check a checkbox then display record</p> <p>3A. Check a checkbox then display record</p>	<p>③ 3B. Check a checkbox then display record</p> <p>3B. Check a checkbox then display record</p>	<p>3C. Check a checkbox then display record</p> 	<p>✓ View Checkbox Field ①</p>
<p>4A. Check/Uncheck a checkbox then display record</p> <p>4A. Check/Uncheck a checkbox then display record</p>	<p>④ 4B. Check/Uncheck a checkbox then display record</p> <p>4B. Uncheck a checkbox then display record</p>	<p>4C. Check/Uncheck a checkbox then display record</p> 	<p>✓ View Checkbox Field ①</p>
<p>5A. Check/Uncheck a checkbox then edit record</p> <p>5A. Check/Uncheck a checkbox then edit record</p>	<p>⑤ 5B. Check/Uncheck a checkbox then edit record</p> <p>5B. Uncheck a checkbox then edit record</p>	<p>5C. Check/Uncheck a checkbox then edit record</p> 	<p>✓ View Checkbox Field ①</p>
<p>6A. Show/Hide project section then display record</p> <p>6A. Show/Hide project section then display record</p>	<p>⑥ 6B. Show/Hide Project Information Section then display record</p> <p>6B. Hide project information section then display record</p>	<p>⑥ 6C. Show/Hide project section then display record</p> 	<p>✓ View Show Project Section Field ①</p>
<p>7A. Change to a different form then display record</p> <p>7A. Change to a different form then display record</p>	<p>⑦ 7B. Change to a different form then display record</p> <p>7B. Change to a different form then display record</p>	<p>7C. Change to a different form then display record</p> 	
<p>8A. Assign to self then display record</p> <p>8A. Assign to self then display record</p>	<p>⑧ 8B. Assign to self then display record</p> <p>8B. Assign to self then display record</p>	<p>⑧ 8C. Assign to self and then display record</p> 	<p>① View Project Manager Field Albert Cruz</p>
<p>⑨ 9A. Create a project snapshot then display record</p> <p>9A. Create a project snapshot then display record</p>	<p>⑨ 9B. Create a project snapshot then display record</p> <p>9B. Create a project snapshot then display record</p>	<p>⑨ 9C. Create a project snapshot then display record</p> 	
<p>⑩ 10A. Pop up an alert</p> <p>10A. Pop up an alert</p>	<p>⑩ 10B. Pop up an alert</p> <p>10B. Pop up an alert</p>	<p>⑩ 10C. Pop up an alert</p> 	

Use Quick Base or create your own with CSS



Green Square Bar Graph



```
var text star = "<img" & " src=\"\" & "https://images.quickbase.com/si/16/228-rect_green.png\">";  
var text notstar = "<img" & " src=\"\" & "https://images.quickbase.com/si/16/226-rect_gray.png\">";  
var number numberstars = (Floor([% Project Completed] * 10));
```

//10 is the number of units, because 10 is 1/10th of 100.

```
"<span alt=\"\" & ToText($numberstars) & " of 10 \" title=\"\" & ToText($numberstars) & " of 10 \" class=\"NoWrap\">" &  
  If($numberstars >= 1, $star, $notstar) &  
  If($numberstars >= 2, $star, $notstar) &  
  If($numberstars >= 3, $star, $notstar) &  
  If($numberstars >= 4, $star, $notstar) &  
  If($numberstars >= 5, $star, $notstar) &  
  If($numberstars >= 6, $star, $notstar) &  
  If($numberstars >= 7, $star, $notstar) &  
  If($numberstars >= 8, $star, $notstar) &  
  If($numberstars >= 9, $star, $notstar) &  
  If($numberstars >= 10, $star, $notstar) &  
"</span>"
```

Green Square Bar Graph (Press to adjust %)

 **Press to adjust % Completed**



This option allows you to press one of the 10 boxes and it invokes an `API_EditRecord` to change the value of the % Project Complete field. This changes the number of green boxes versus gray boxes.

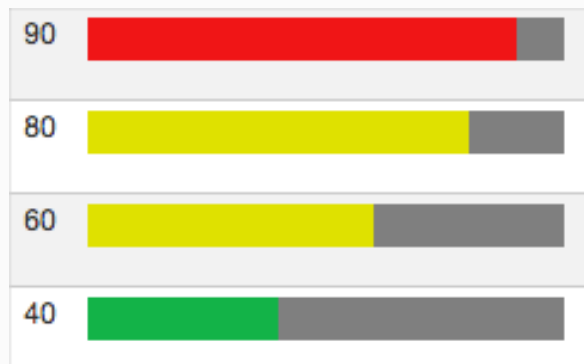
After executing it returns back to from where it started.

Open the application and edit the field properties to view the code.

Smooth Performance Bar

```
var text redbox = ""&URLRoot()&"/up/" & [_DBID_DOCUMENTS] & "/a/r" & 6 & "/e7/v0"; // red
var text yellowbox = ""&URLRoot()&"/up/" & [_DBID_DOCUMENTS] & "/a/r" & 5 & "/e7/v0"; // yellow
var text greenbox = ""&URLRoot()&"/up/" & [_DBID_DOCUMENTS] & "/a/r" & 4 & "/e7/v0"; // green
var text graybox = ""&URLRoot()&"/up/" & [_DBID_DOCUMENTS] & "/a/r" & 3 & "/e7/v0"; // gray
var text orangebox = ""&URLRoot()&"/up/" & [_DBID_DOCUMENTS] & "/a/r" & 2 & "/e7/v0"; // orange
var text box = If([Performance]<0.6,$greenbox, If([Performance]<0.9,$yellowbox,$redbox));
var text widthval = "\&Min(Max([Performance]*200,0),200)&\&";
var text widthvalbalance = "\&ToText(Max(0,Min(200,200-([Performance]*200))))&\&";
```

```
"" &""
```



Using CSS and formulas

```
var number days = ToDays(Today()-[Est End Date]);  
var date Estimate = [Est End Date];  
var text red = "<a style=\" text-decoration: none; background: #ea4335; border-radius:  
var text green = "<a style=\" text-decoration: none; background: #34a853; border-radi  
var text yellow = "<a style=\" text-decoration: none; background: #fbbc05; border-radi  
var text gray = "<a style=\" text-decoration: none; background: #c2c2c2; border-radius  
  
If([Status]="Completed",$gray,  
(If(ToDays([Est End Date]-Today())>5,$green,  
(If(ToDays([Est End Date]-Today())>0,$yellow,  
(If(ToDays([Est End Date]-Today())<=0,$red))))))
```

(See app for complete formula)

Days
Completed
-69 Days Due
-4 Days Due
Completed
-56 Days Due
64 Days Overdue


Assignment, email workflow, approval and log

- Using radio button to trigger emails
- Using radio button to activate pointer graphic
- Using logging text to capture approvals
- Using a formula checkbox to track approvals
- Using logging text to capture audit trail

Assignment workflow and approval

Next Action All Approved

Send to Program Manager
 Send to Sales Manager
 Send to Support Manager
 None of the above

 Program Manager
QuickBase

Sales Manager
QuickBase

Support Manager
QuickBase

Program Manager Approval
Approved

Sales Manager Approval

Support Manager Approval

Log

11/16/2015 5:00pm Dennis Pierce - Send to Program Manager

Assignment, Status Background Color

Status Background Color

Not Started

Case ([Color Status],

"Not Started", "<div style=\"background-color:pink;width:50\">Not Started</div>",

"In-Progress", "<div style=\"background-color:lightyellow;width:50\">In-Progress</div>",

"Completed", "<div style=\"background-color:honeydew;width:50\">Completed</div>",null)

Status Text Color

Status Text Color

Not Started

```
Case([Color Status],  
"Not Started", "<font color=red>Not Started</font>",  
"In-Progress", "<font color=orange>In-Progress</font>",  
"Completed", "<font color=green>Completed</font>")
```

Project Template Selector

Template Selector

14 - New Marketing Project

```
"javascript:void(copyMasterDetailButtonHandler('&sourceRID="&[Template Selector]&"&destid=" & [Record ID#] & "', 'bjq8b7xcx'))"
```

// Note the [Template Selector] field advising this button to import tasks from a specific template

Tasks and Sub-Task Option

Add Sub-Task

```
URLRoot() & "db/" & [_DBID_TASKS] & "?act=API_GenAddRecordForm&_fid_48=" &  
[Related Project] & "&_fid_6=" & [Task Name] & "&z=" & Rurl()
```

// This formula URL is added to the task table

// and is invoked from the embedded report link of all the tasks on the project record

Change status to completed then display record

1A. Change status to completed then display record

```
URLRoot() & "db/" & Dbid() & "?a=API_EditRecord" &  
"&rid=" & [Record ID#] &  
"&apptoken=d9eascudwjxs2sesxkjccwgtq9r" &  
"&_fid_28=Completed" &  
"&_fid_143=100" &  
"&rdr=" &  
URLEncode(URLRoot() & "db/" & Dbid() &  
"?a=dr&rid=" & [Record ID#])
```

Integrate SKYPE and Google Voice dialing

Skype Username

Phone

Skype Logo [Revisions](#)

Skype Thumbnail

Right-click over the button and edit the field properties to view/copy the code.

FORMULA URL VERSION	FORMULA TEXT VERSION	FORMULA TEXT GRAPHIC
S1A. Call Username via Skype <input type="text" value="S1A. Call Username via Skype"/>	S1B. Call Username via Skype <input type="text" value="Call: echo123"/>	S1C. Call Username via Skype <input type="text" value="S"/>
S2A. Call Phone via Skype <input type="text" value="S2A. Call Phone via Skype"/>	S2B. Call Phone via Skype <input type="text" value="Call: 5135503165"/>	S2C. Call Phone via Skype <input type="text" value="S"/>



Let's take a look at the app



Benefits

- ① Automate a complex process
- ② Provide a custom user experiences
- ③ Ease new user adoption
- ④ Save training time
- ⑤ It makes QuickBase more fun and useable
- ⑥ Looks like magic

Jump in and try them

- ① Get the “Magic Buttons” application from the Quick Base Exchange
- ② Check out the ”Overview Video” and this PPTX deck on the dashboard
- ③ Find the function you want
- ④ Select the button you want
- ⑤ Right-click and edit the field properties
- ⑥ Copy and paste into your own application
- ⑦ PLEASE EMAIL ME WITH YOURS! ktrachy@quickbase.com

MORE

BUTTONS?

If you have cool buttons, please send them to us.

ktrachy@quickbase.com

Questions?

If they are really cool we can add them to the, “Magic Buttons” app.



Thank You!



(Stop! Don't go any further. You don't have anything else to show. People will have to read this and worry about missing something. There isn't anything else to read so you may as well not include this slide.)