

## PO APPROVAL WORKFLOW SAMPLE MODULE

### BUSINESS REQUIREMENT

This sample module includes Extender workflow templates and related message templates, as well as workflow actions to support various scenarios for PO Purchase Order and PO Requisition approvals in Sage 300.

It also includes a custom table to store Users, their personal spending limit and their department manager and a custom workflow action to use this table in the workflow templates.

Pre-requisites:

- Latest product update of Extender version 2019 and above
- To populate optional fields, create POSTATUS and POWFNOTE optional fields in Common Services and attach to PO Purchase Order Header and PO Requisition Header
- To use Remote Action Service, import and configure the Remote Action Service module

Import the Module in Extender Setup > Modules

### HELP REFERENCE

Refer to Extender help for details on more recent configuration options for this module

<https://help.orchid.systems/sage300addons/Content/Extender/VI-ExtenderTutorials/Workflow-POModuleApproval.htm>

### KEY LEARNINGS

#### ***PO Requisition approval workflow template:***

Requisition is set on hold when the requisition is inserted, Manager receives an email.

Manager is set based on the custom table

Workflow creates a PDF for the PO Requisition

When requisition is approved, a PO is created automatically

#### ***PO Purchase order approval workflow template:***

Multi-level approval above an amount set per user (in Extender custom table).

If below the amount configured, single approver – (as per parameter in View Events, Scripts and workflow)

If above the amount configured for the user, Department manager (configured in custom table) approves first, and then 2<sup>nd</sup> approver (as per parameter in View Events, scripts and wf)

Final approver takes PO off hold

Workflow creates a PDF for the Purchase Order, and optionally emails the vendor when the PO is approved.

### ***Remote Action***

Option to use the Remote Action service in the same templates if you have purchased a subscription to Remote Action service and have a token.

## **CUSTOM ACTIONS**

### ***Workflow.CreatePOFromPOReq***

– can be used with Extender Configurator or Developer

Requires 2 parameters: Workflow value to store the PO Number created and workflow value to store the error message if relevant

### ***POApprovals.Workflow.PrintPDFEmailPOOrder and POApprovals.Workflow.PrintPDFPORequisition***

– Requires Extender Developer

No parameters as the configuration options are in the POAPPROVALS.VIOPRNT configuration table. See below.

### ***POApprovals.workflow.SetValueFromCustomTable –***

– Requires Extender Developer Edition

Requires 4 parameters:

# P1 CustomTableViewName – Include the full custom table name, including the module name

# P2 KeyValue – In the example, we want to read the manager for the logged on user, so P2 is set to {USERID}. If the table has multiple fields in the key, enter a comma separated list, e.g. {USERID}, {LOCATION} to retrieve fields for a table where User and locations are the key fields.

# P3 CustomTableFieldName - to read from.

# P4 WFValue - this is the workflow variable we will be saving the field value into.

Requires Extender PU7.12 and above

## MODULE OVERVIEW

- PO Purchase Order Approval workflow template and related message templates
- PO Requisition approval workflow template and related message templates
- Custom Extender table VIUSDEPT: store User ID, Manager and Delegation of authority limit
- Custom Extender table VIULDPT: store User ID, Location and manager – Not used in included templates
- Custom actions (as above): workflow.CreatePOFromReq and POApprovals.workflow.SetValueFromCustomTable

## EXTENDER SETUP KEY STEPS

Refer Extender online help

<https://help.orchid.systems/sage300addons/Content/Extender/VI-ExtenderTutorials/Workflow-POModuleApproval.htm>

- Configure SMTP Email settings in Extender Options (Email Tab)
- Create User Group as required and add Sage 300 users that are in the Team to approve workflow. (Workflow User Groups)
- Add Workflow colours if required
- Workflow templates are attached to the PO0620 for the PO Approval template, and PO0760 for the PO Requisition approvals
- To populate optional fields, create POSTATUS and POWFNOTE optional fields in Common Services and attach to PO Purchase Order Header and PO Requisition Header
- To configure workflow icons on screens, refer to Extender help
- To use Remote Action Service to approve / progress workflows without logging on to Sage 300, refer to Remote Action Service documentation.

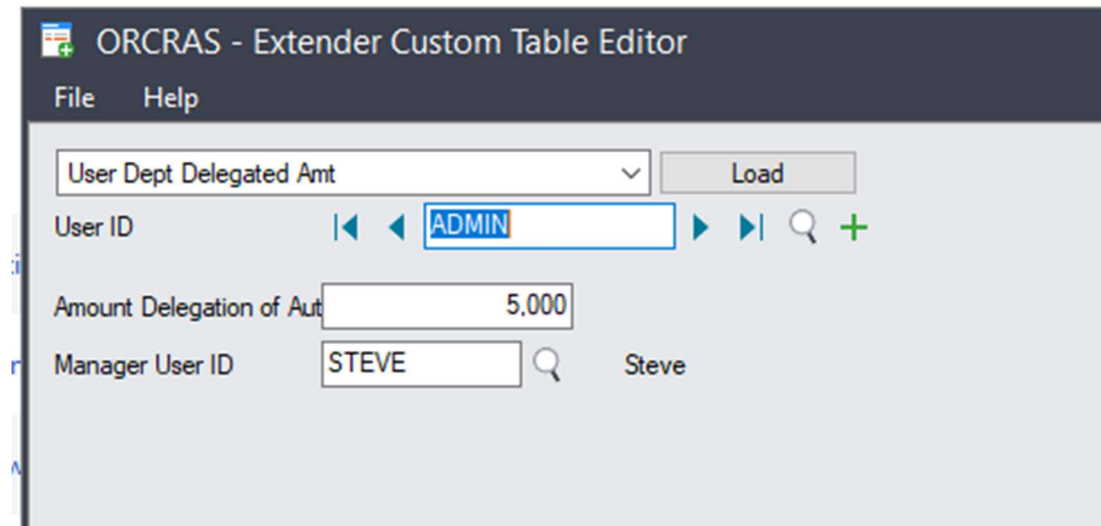
## CUSTOM ACTION EXAMPLES

### *SetValueFromCustomTable*

Enter Amount and Manager User for all users who will be entering PO and PO Requisitions.

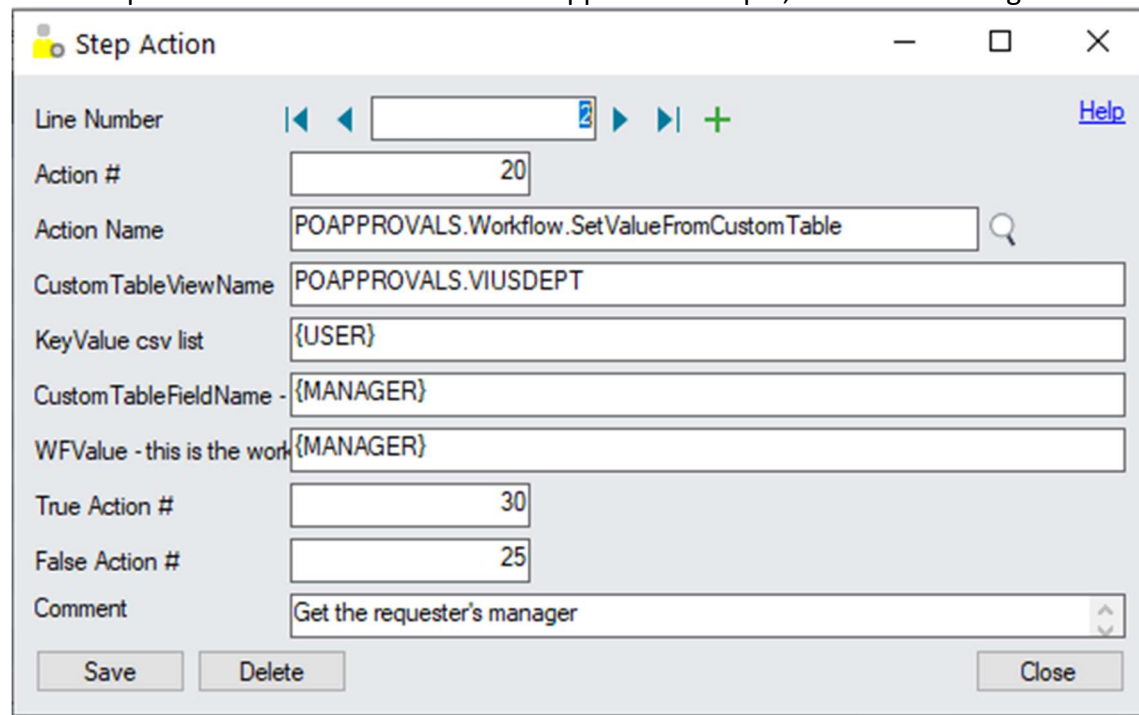
## Extender Workflow PO Approval Example

(use Extender Setup > Custom Table Editor or a custom script that you can add to the desktop).



The screenshot shows the 'ORCRAS - Extender Custom Table Editor' window. It has a menu bar with 'File' and 'Help'. Below the menu bar, there is a dropdown menu set to 'User Dept Delegated Amt' and a 'Load' button. The main area contains several input fields: 'User ID' with a value of 'ADMIN', 'Amount Delegation of Aut' with a value of '5,000', and 'Manager User ID' with a value of 'STEVE'. There are navigation buttons (back, forward, search, etc.) and a search icon next to the 'Manager User ID' field.

To use the Custom action in the workflow to read values from the custom table, enter the relevant parameters. For Purchase Order approval example, use the following:



The screenshot shows the 'Step Action' configuration window. It has a title bar with a yellow icon and the text 'Step Action'. The window contains several input fields: 'Line Number' with a value of '2', 'Action #' with a value of '20', 'Action Name' with a value of 'POAPPROVALS.Workflow.SetValueFromCustomTable', 'CustomTableViewName' with a value of 'POAPPROVALS.VIUSDEPT', 'KeyValue csv list' with a value of '{USER}', 'CustomTableFieldName -' with a value of '{MANAGER}', 'WFValue - this is the work' with a value of '{MANAGER}', 'True Action #' with a value of '30', 'False Action #' with a value of '25', and 'Comment' with a value of 'Get the requester's manager'. There are navigation buttons (back, forward, search, etc.) and a search icon next to the 'Action Name' field. At the bottom, there are 'Save', 'Delete', and 'Close' buttons.

*Create PO from PO Requisition*

The screenshot shows a 'Step Action' dialog box with the following fields and values:

- Line Number: [Navigation icons] [Input field]
- Action #: 80
- Action Name: CreatePOFromPOReq
- ValuePONumber: {WFPONUMBER}
- ValueIfError: {WFERRORMSG}
- True Action #: 90
- False Action #: 140
- Comment: Create PO from Requisition

Buttons at the bottom: Save, Delete, Close. A Help link is visible in the top right corner.