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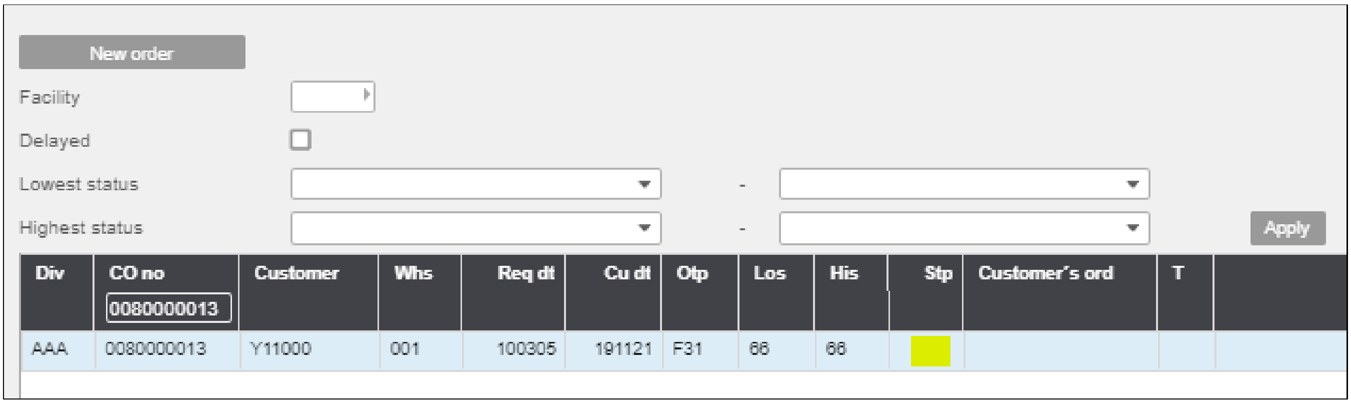
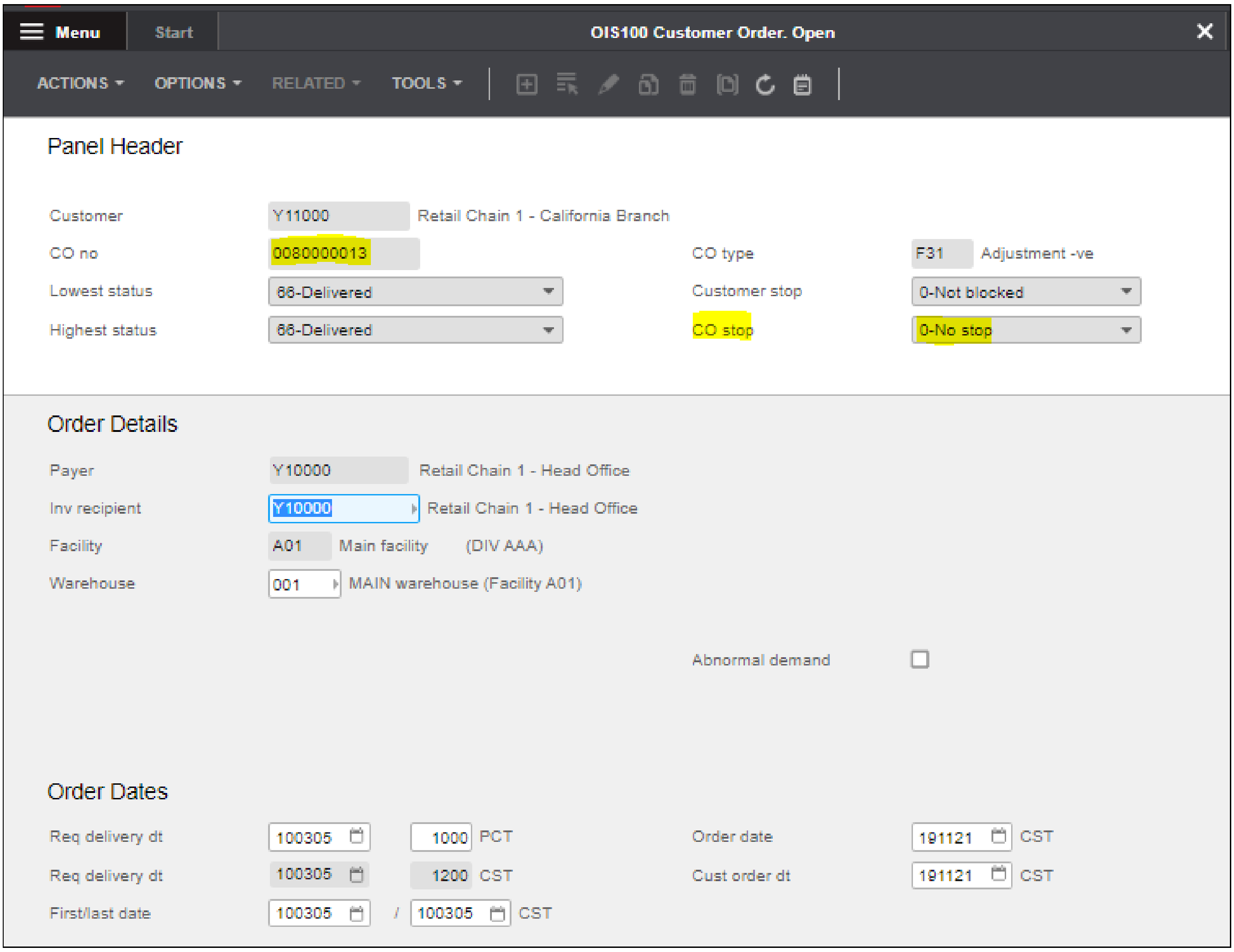
How to … ?	*Use a simple workflow in MingLe*
Prerequisite	*InforOS Platform 12.0.30+* *M3BE 15.1.4*
Expected result	*Trigger a MingLe workflow when a customer order has over-exceeded the credit limit amount set at customer level.* *This workflow should ask for validation to the customer sales representative with escalation process to the customer account responsible.*

Case #1 – Workflow is not triggered

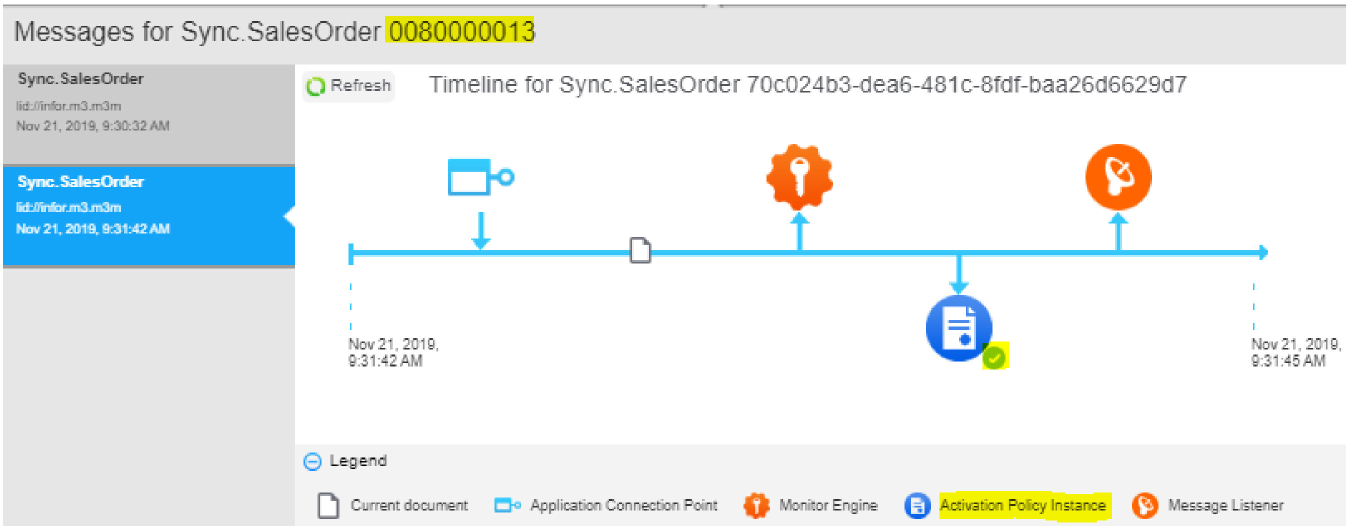
Create a customer order with a credit block = 0.

The Activation Policy will be triggered since it is a sales order but we expect the workflow not to be triggered.



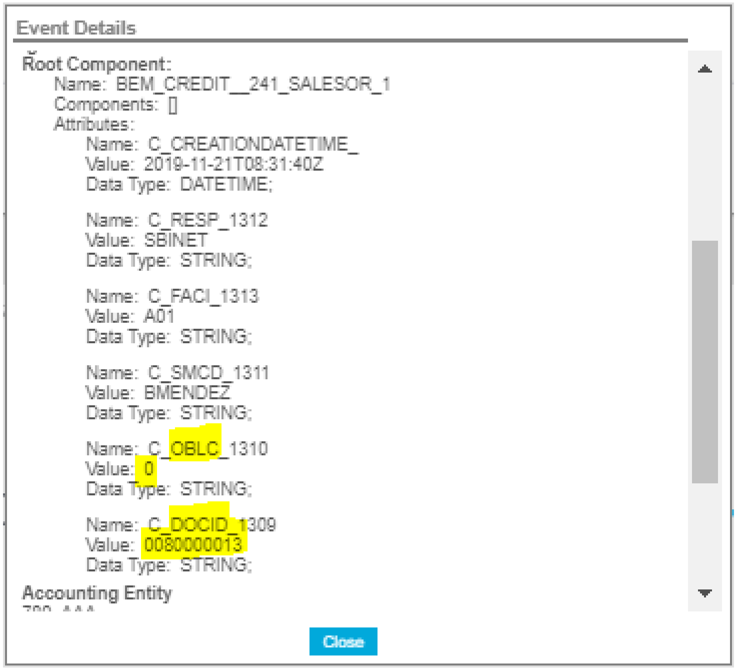


You can check the activation policies, BOD and workflows in **ION Desk -> OneView** :

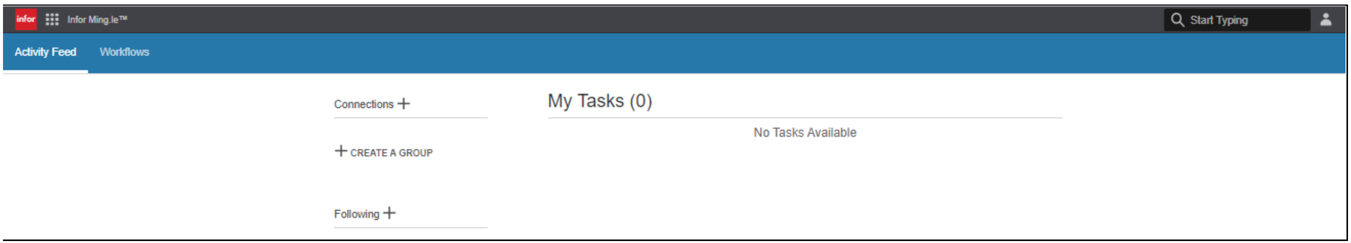


You can see that the Activation Policy has been triggered.

You can access the details by clicking on the  icon.

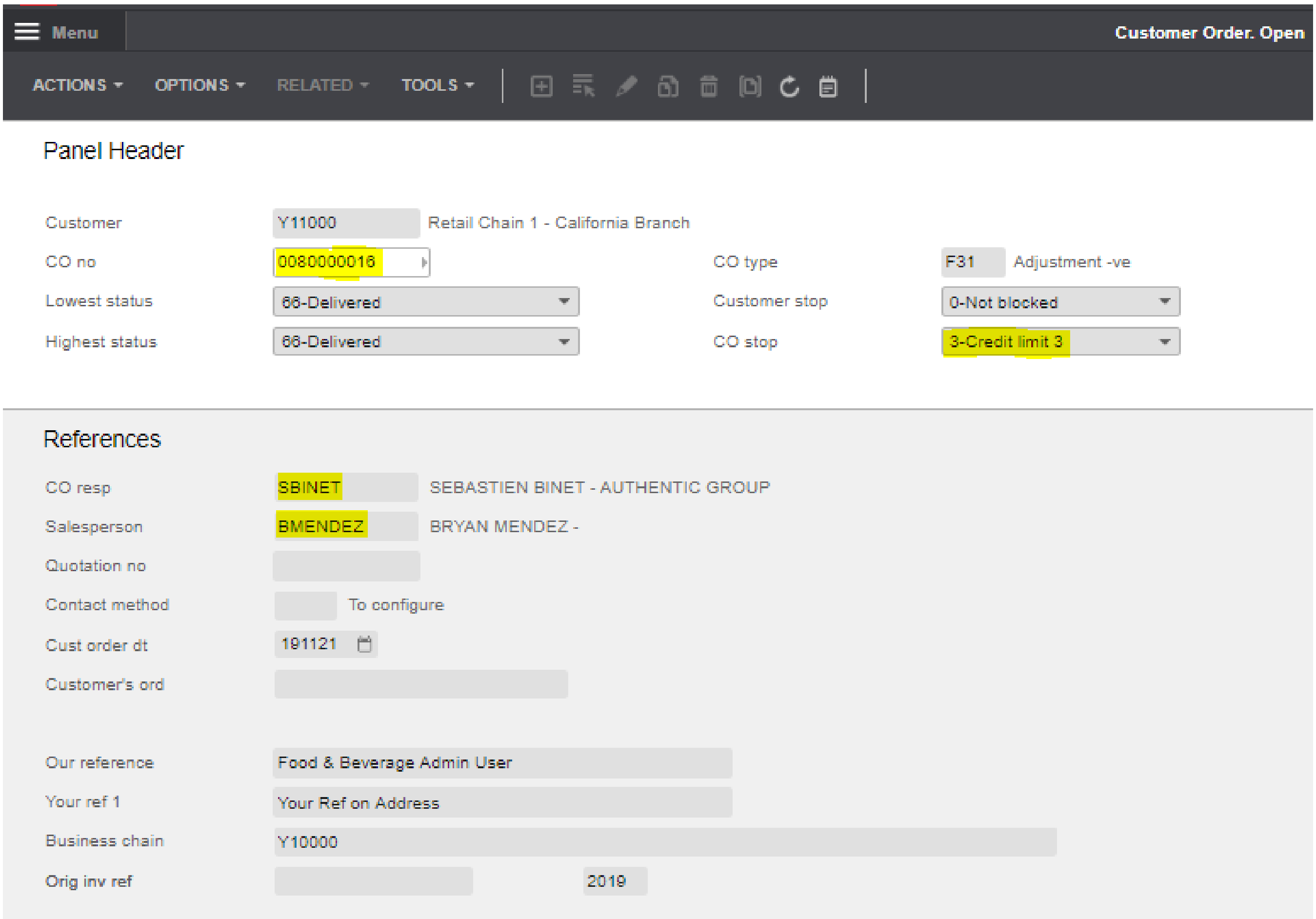


If the workflow had been triggered, a task would have been created in MingLe.



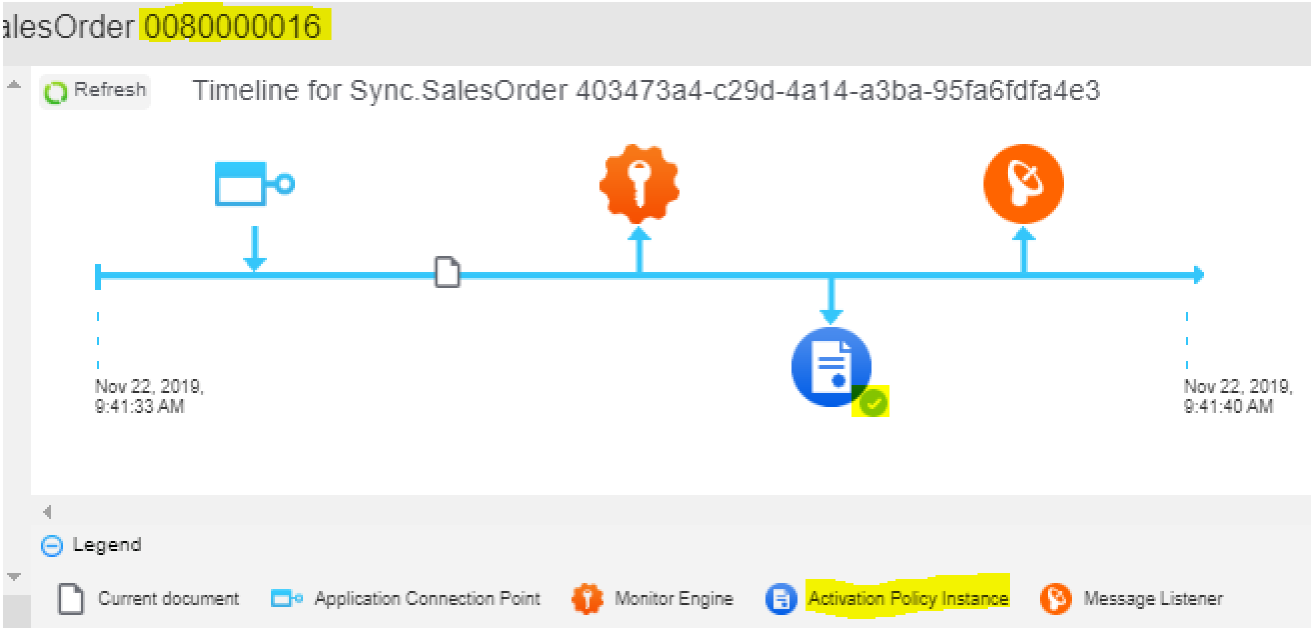
Case #2 – Workflow is triggered

Let's do the same but with an order having a credit limit stop code equal to 3.

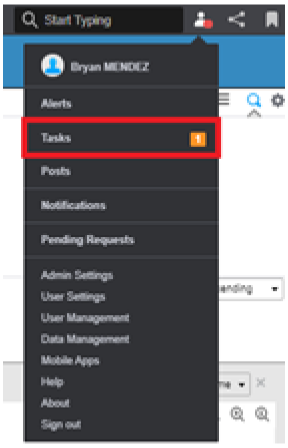


The **salesperson** is BMENDEZ.
The **responsible** is SBINET.

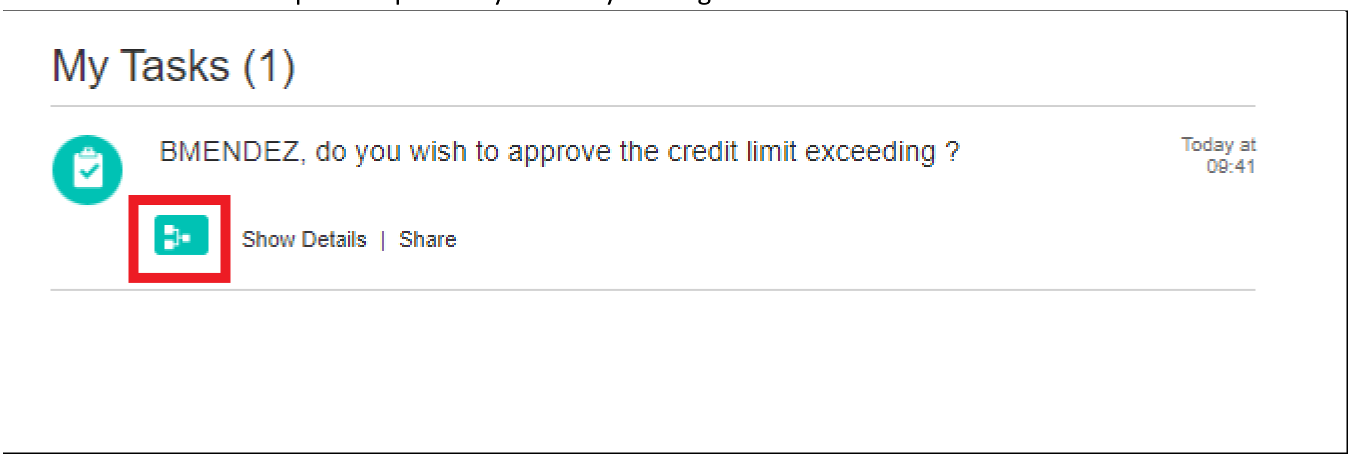
In OneView, we can check the Activation Policy state again :

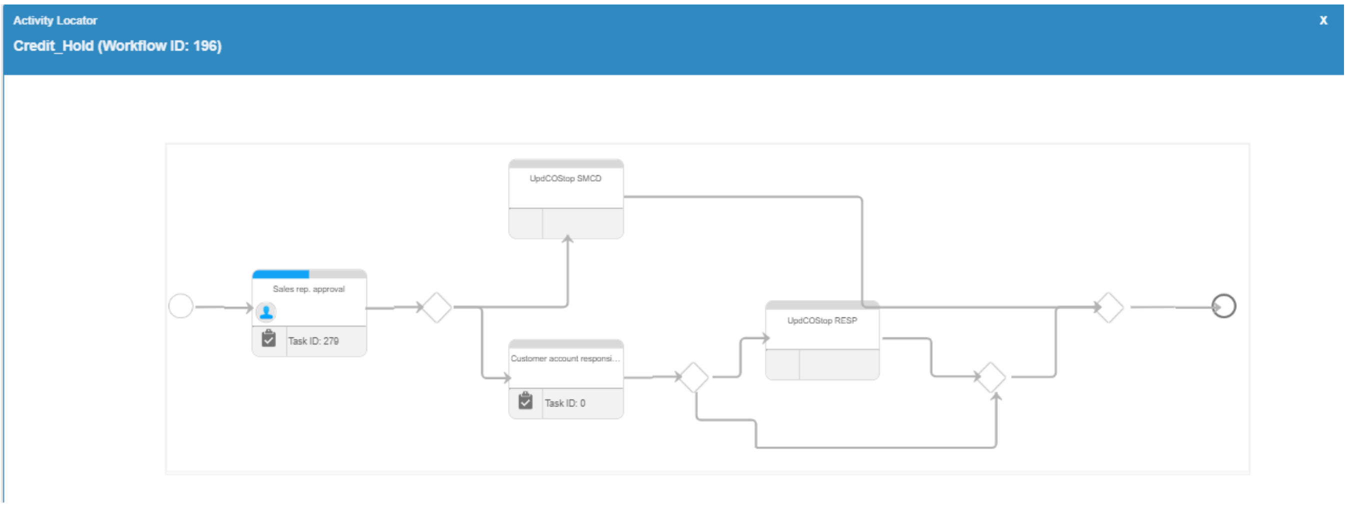


This time, I have a notification :

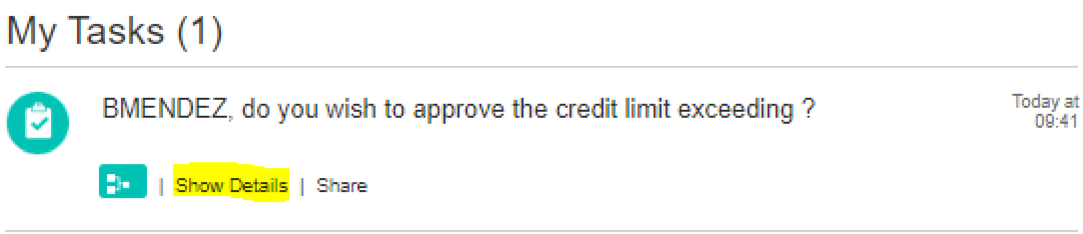


You can see at which step of the process you are by clicking on the workflow icon :

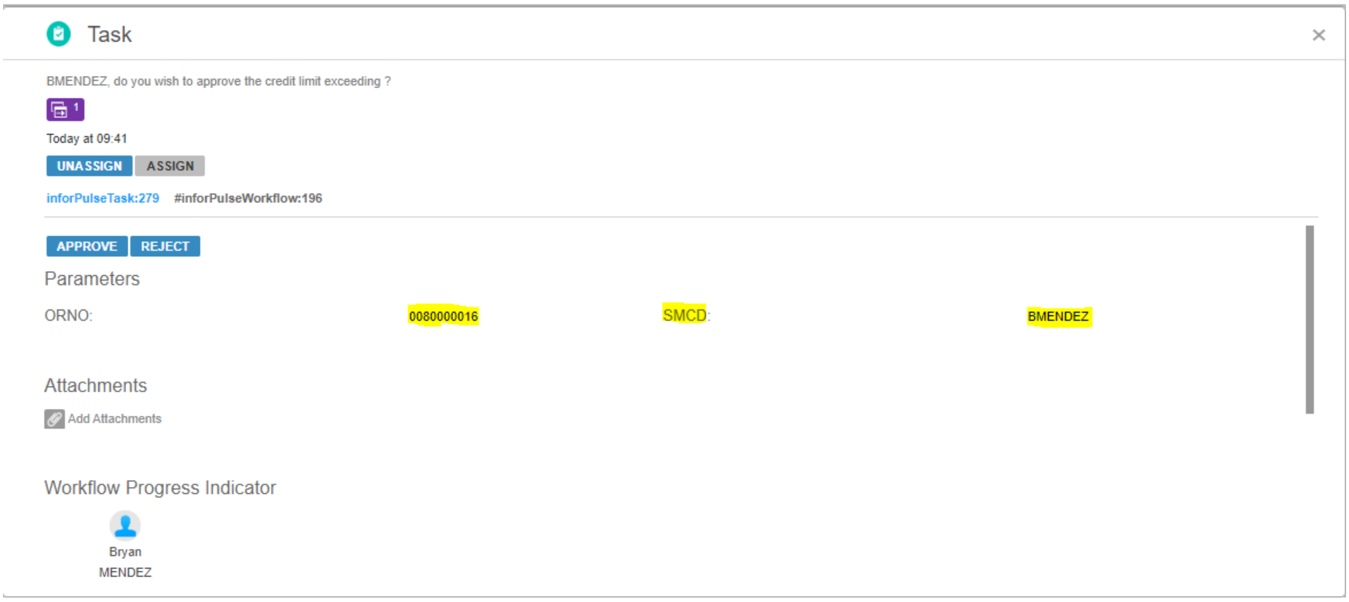


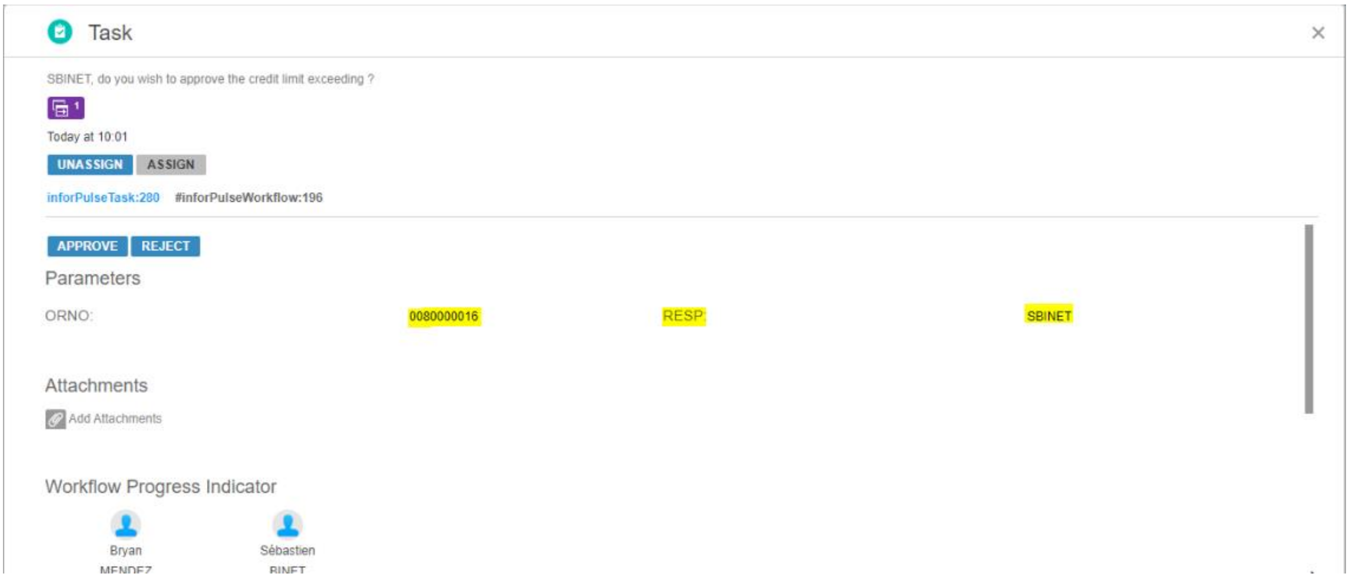


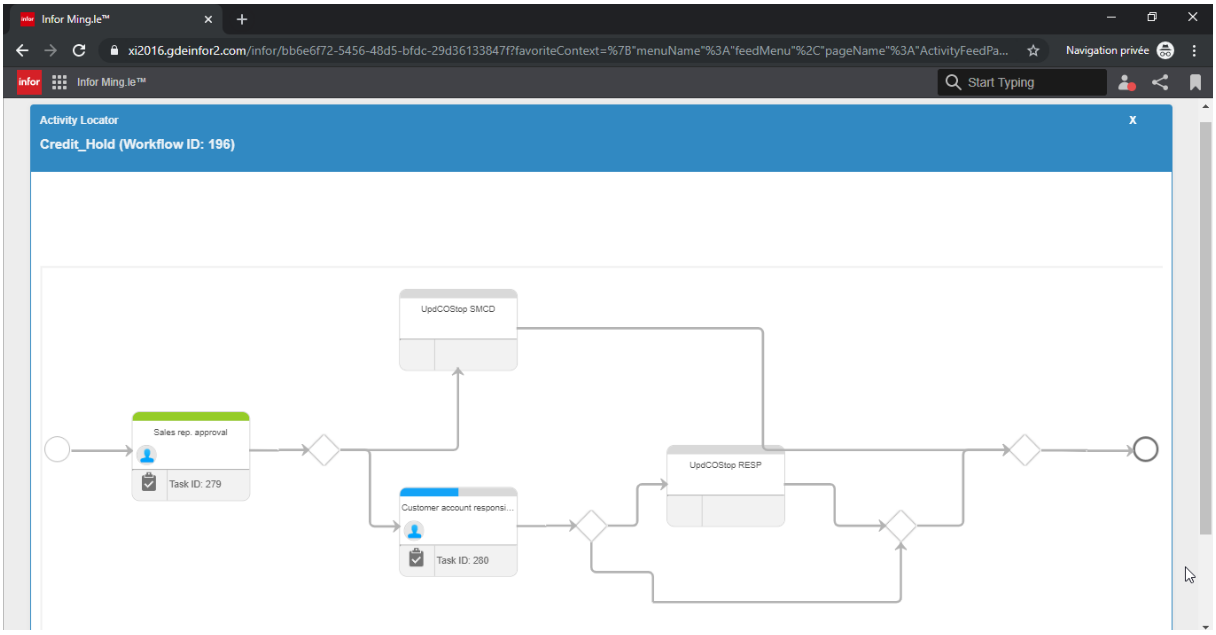
Click on **Show Details :**



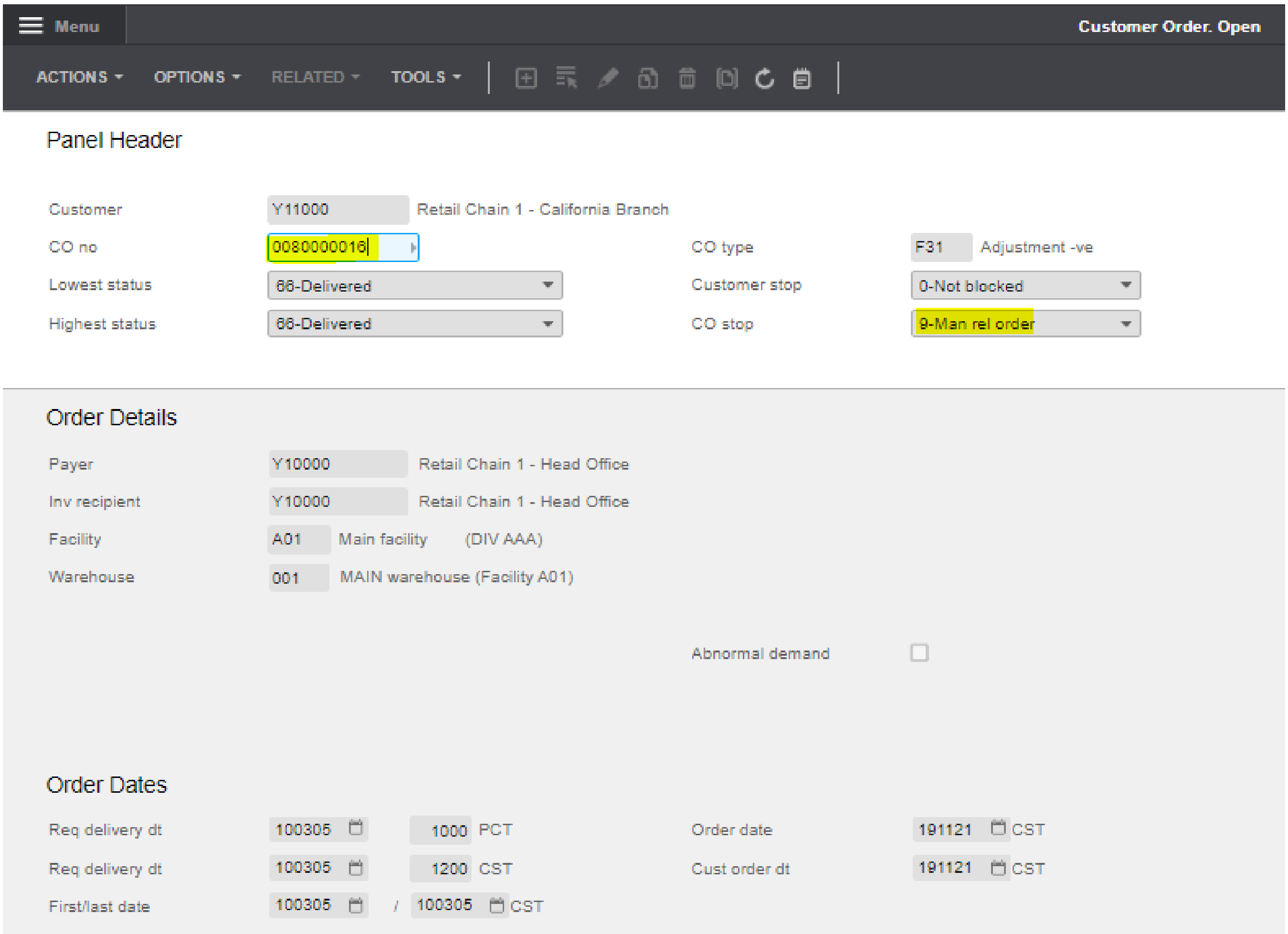
I can then approve or not. I want the escalation process to be triggered so I reject and the task will be assigned to the customer account responsible.



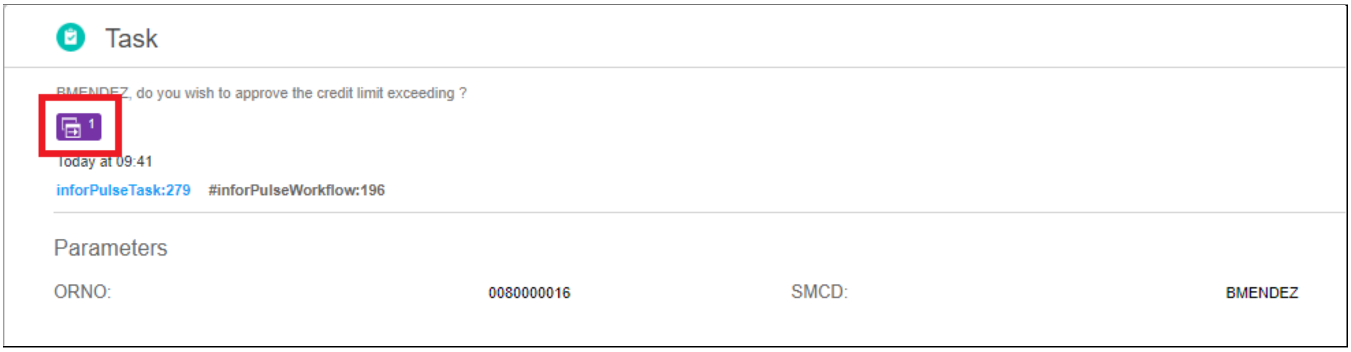

Task
SBINET, do you wish to approve the credit limit exceeding ?
Today at 10:01
UNASSIGN
ASSIGN
inforPulseTask:280
#inforPulseWorkflow:196
APPROVE
REJECT
Parameters
ORNO:
0080000016
RESP
SBINET
Attachments
Add Attachments
Workflow Progress Indicator
Bryan
Sébastien

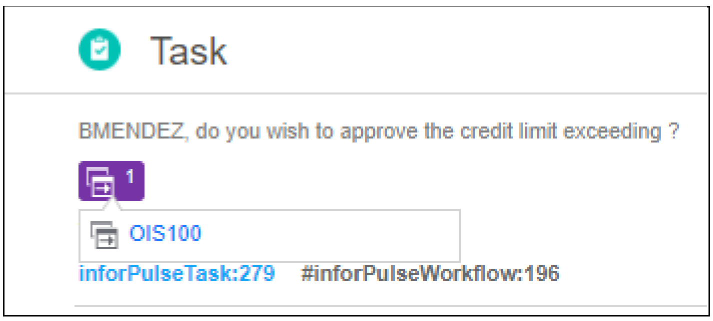

Infor Ming.le™
Navigation privée
Infor Ming.le™
Start Typing
Activity Locator
Credit_Hold (Workflow ID: 196)
UpdCOStop SMCD
Sales rep. approval
Task ID: 279
UpdCOStop RESP
Task ID: 280

After the approval, we can see the customer order is released from credit hold :

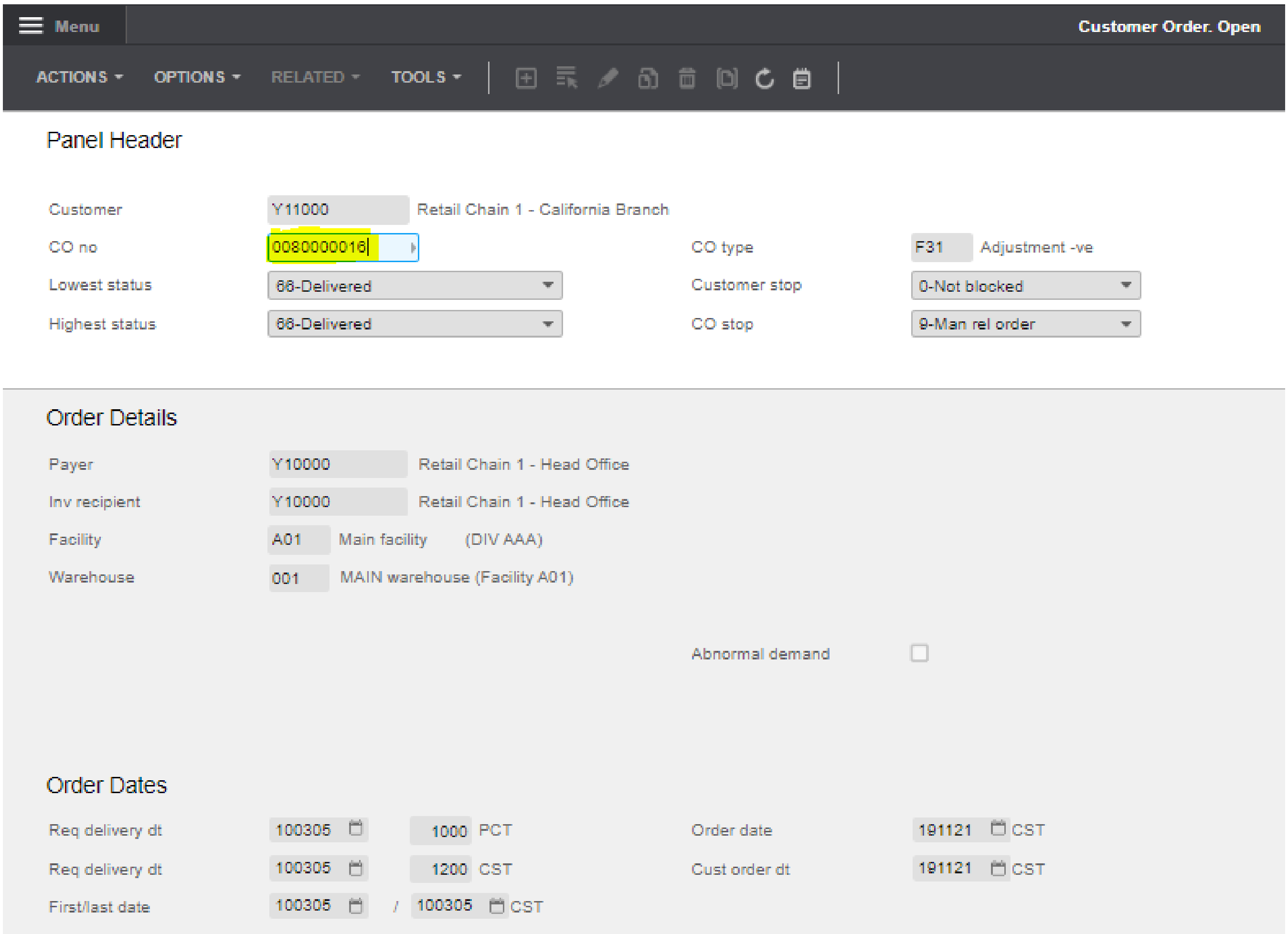


You can also add a **Drill back** in your tasks.
This is what the button looks like when it is set :





This **Drill back** is set to open OIS100 on the order used in the workflow :

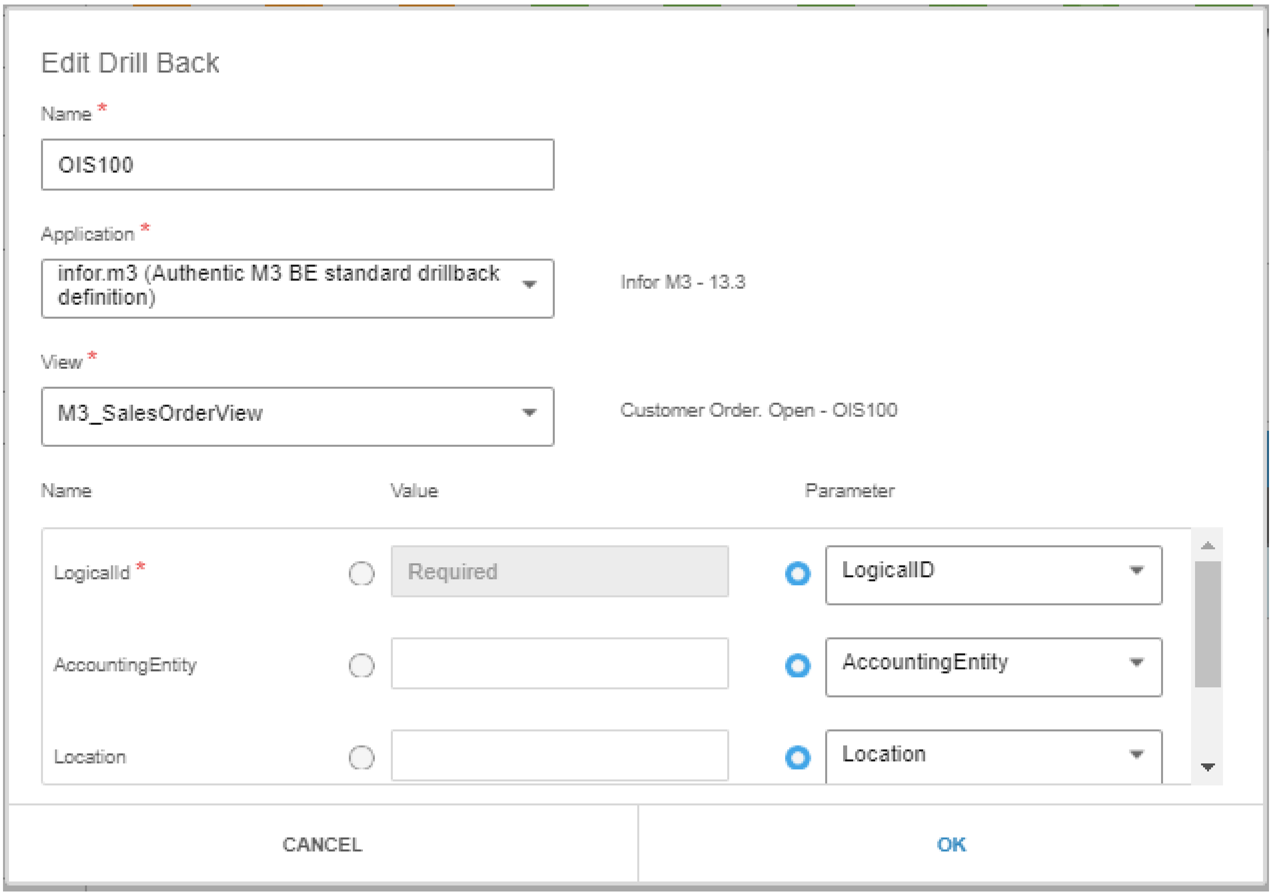


If you’re interested in **setting a Drill Back**, here you go!

Before you can modify your **Activation policy** and your **Workflow**, you need to deactivate them.

In the **Workflow**, in **Workflow Properties**, go to the **Drill Backs** tab.
(Reminder: To see the **Workflow Properties**, click on the Start or End circle)

Click on **Add** (The **+** sign).



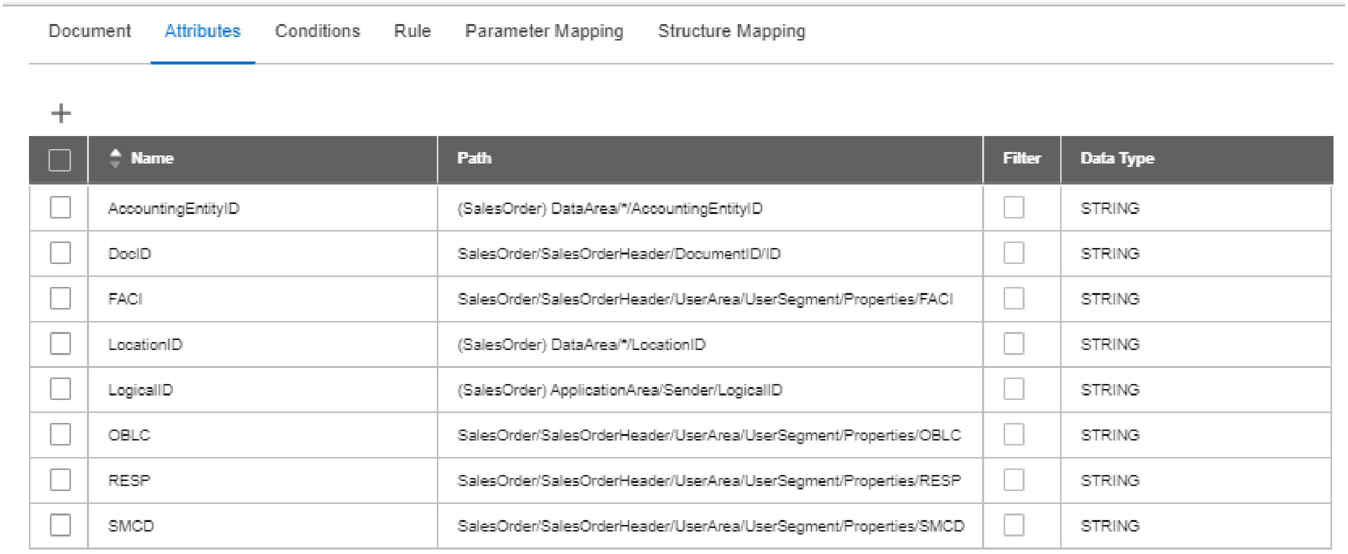
Name your Drill Back.
Select your application (here, Infor M3) and the view (M3_SalesOrderView).
You can see the parameters the Drill back needs:

- The **LogicalId**
- **Accounting Entity**
- **Location**
- **DocID** (The Customer Order Number, which we already have)

Create those parameters in the **Parameters** tab

☐	Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
☐	Location	STRING			☑	☐	☐	
☐	LogicalID	STRING			☑	☐	☐	
☐	AccountingEntity	STRING			☑	☐	☐	

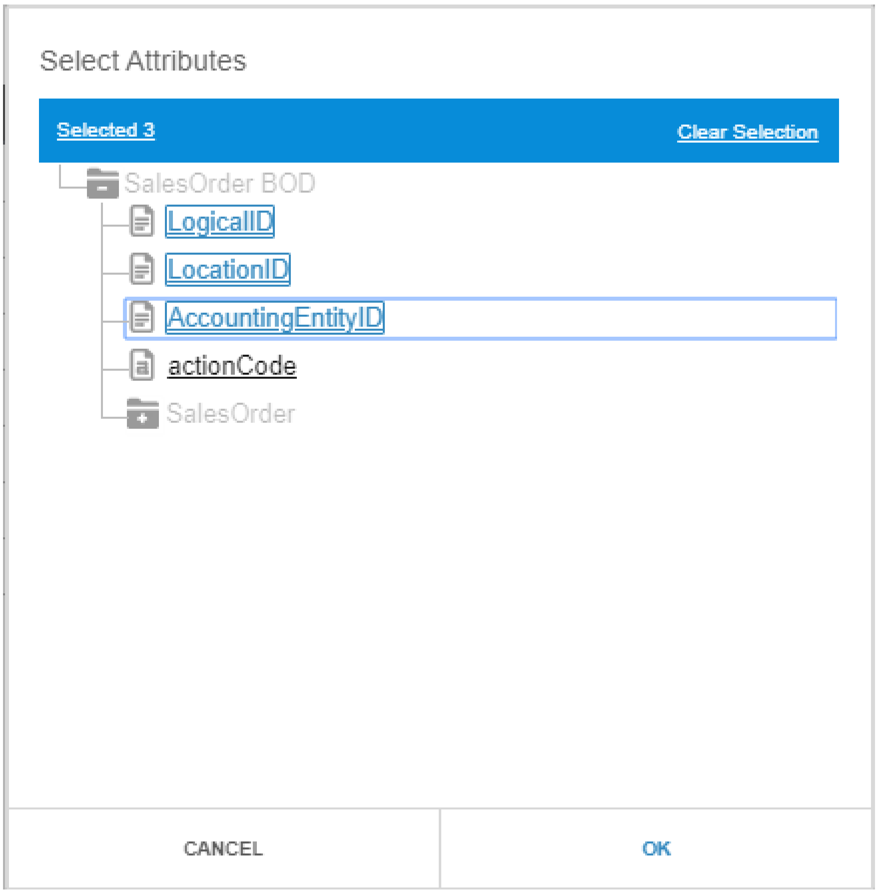
Now we need to get the values of those parameters.
In the **Activation policy**, under the **Attribute** tab, we will add the 3 new attributes.


Document | Attributes | Conditions | Rule | Parameter Mapping | Structure Mapping

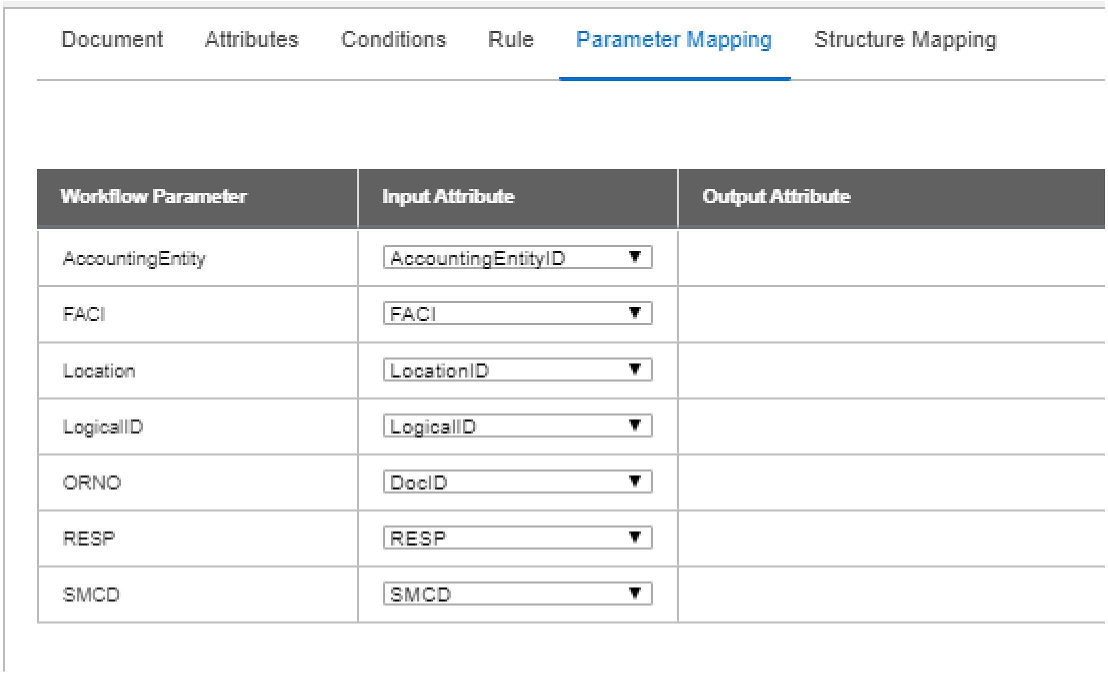
+

	Name	Path	Filter	Data Type
☐	AccountingEntityID	(SalesOrder) DataArea/*/AccountingEntityID	☐	STRING
☐	DocID	SalesOrder/SalesOrderHeader/DocumentID/ID	☐	STRING
☐	FACI	SalesOrder/SalesOrderHeader/UserArea/UserSegment/Properties/FACI	☐	STRING
☐	LocationID	(SalesOrder) DataArea/*/LocationID	☐	STRING
☐	LogicalID	(SalesOrder) ApplicationArea/Sender/LogicalID	☐	STRING
☐	OBLC	SalesOrder/SalesOrderHeader/UserArea/UserSegment/Properties/OBLC	☐	STRING
☐	RESP	SalesOrder/SalesOrderHeader/UserArea/UserSegment/Properties/RESP	☐	STRING
☐	SMCD	SalesOrder/SalesOrderHeader/UserArea/UserSegment/Properties/SMCD	☐	STRING

They are easy to find since they are information about the document :

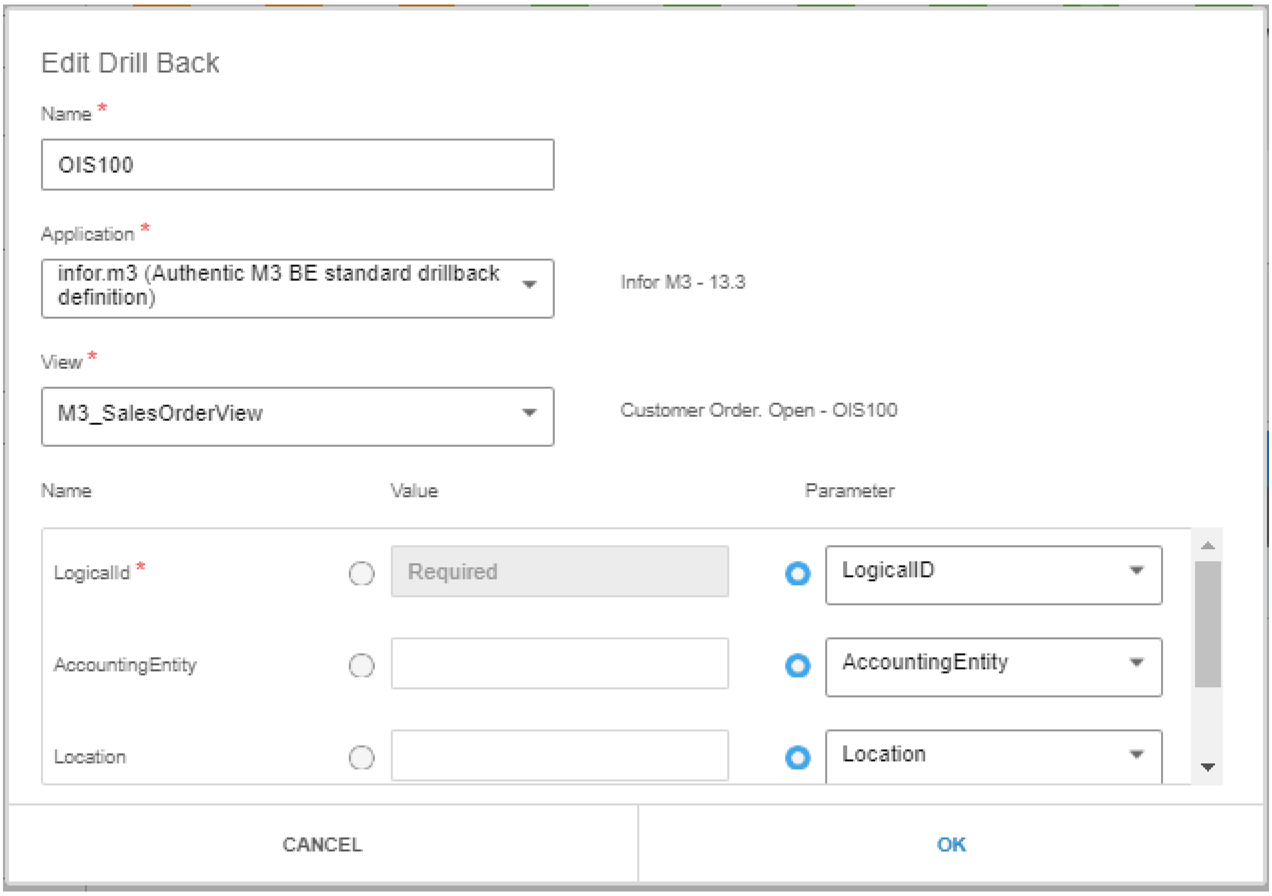


We need to map them to the parameters expected by the workflow.
Go to the **Parameter Mapping** tab and do it.

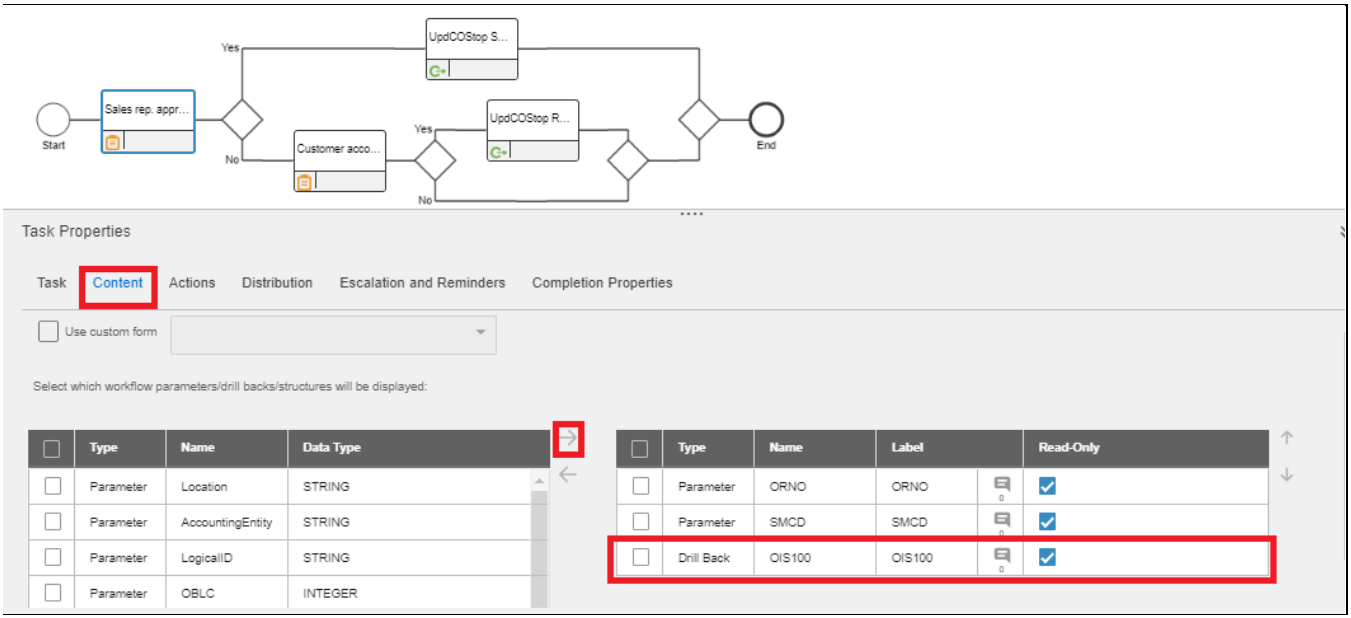


Workflow Parameter	Input Attribute	Output Attribute
AccountingEntity	AccountingEntityID	
FACI	FACI	
Location	LocationID	
LogicalID	LogicalID	
ORNO	DocID	
RESP	RESP	
SMCD	SMCD	

Go back to your workflow and set your **Drill back.**



Your Drill back being created, you need to associate the **Tasks** with it.
Click on the salesperson's **Task.**
Under the **Content** tab,
Add the **Drill back** the same way we added parameters from the left side to the right side :



Do the same thing with the Task for the account responsible.

And that's it!

Need help or more information ?
Reach us now contact@authentic-grp.com