



How to ... ?	<i>Use a simple workflow in MingLe</i>
Prerequisite	<i>InforOS Platform 12.0.30+ M3BE 15.1.4</i>
Expected result	<i>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.</i>

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.

New order

Facility

Delayed

Lowest status -

Highest status - Apply

Div	CO no	Customer	Whs	Req dt	Cu dt	Otp	Los	His	Stp	Customer's ord	T
AAA	0080000013	Y11000	001	100305	191121	F31	66	66			

Menu Start **OIS100 Customer Order. Open**

ACTIONS ▾ OPTIONS ▾ RELATED ▾ TOOLS ▾

Panel Header

Customer: Y11000 Retail Chain 1 - California Branch

CO no: 0080000013

Lowest status: 66-Delivered

Highest status: 66-Delivered

CO type: F31 Adjustment -ve

Customer stop: 0-Not blocked

CO stop: CO stop

0-No stop

Order Details

Payer: Y10000 Retail Chain 1 - Head Office

Inv recipient: Y10000 Retail Chain 1 - Head Office

Facility: A01 Main facility (DIV AAA)

Warehouse: 001 MAIN warehouse (Facility A01)

Abnormal demand:

Order Dates

Req delivery dt: 100305 1000 PCT

Order date: 191121 CST

Req delivery dt: 100305 1200 CST

Cust order dt: 191121 CST

First/last date: 100305 / 100305 CST

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

Messages for Sync.SalesOrder 0080000013

Refresh Timeline for Sync.SalesOrder 70c024b3-dea6-481c-8fdf-baa26d6629d7

Sync.SalesOrder
lid://infor.m3.m3m
Nov 21, 2019, 9:30:32 AM

Sync.SalesOrder
lid://infor.m3.m3m
Nov 21, 2019, 9:31:42 AM

Nov 21, 2019, 9:31:42 AM

Nov 21, 2019, 9:31:45 AM

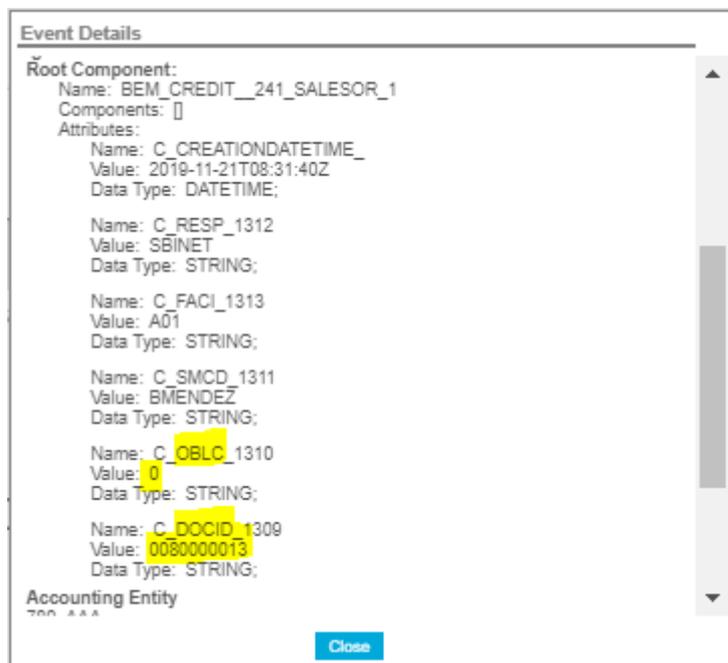
Legend

- Current document
- Application Connection Point
- Monitor Engine
- Activation Policy Instance
- Message Listener

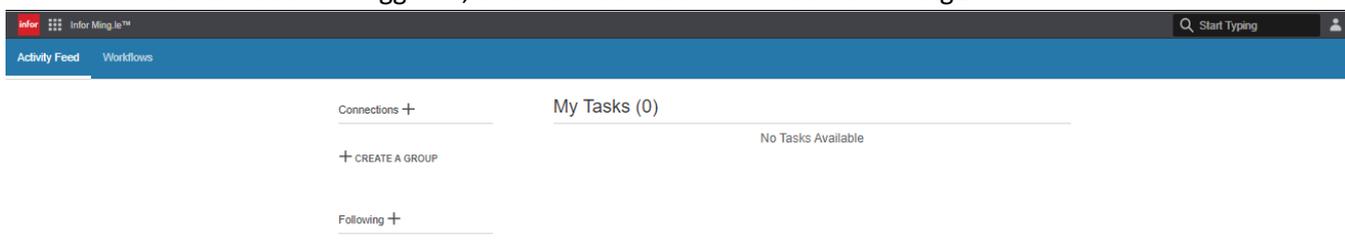
You can see that the Activation Policy has been triggered.



You can access the details by clicking on the icon.

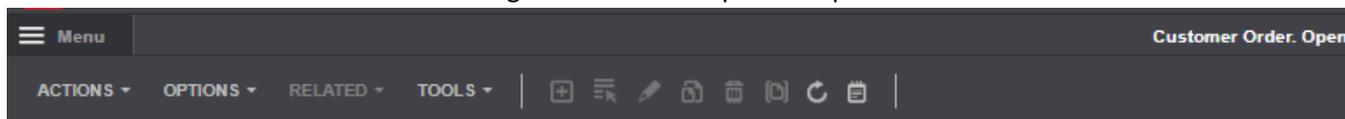


If the workflow had been triggered, a task would have been created in MingLe.



Case #2 – Workflow is triggered

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



Panel Header

Customer	Y11000	Retail Chain 1 - California Branch	CO type	F31	Adjustment -ve
CO no	0080000016		Customer stop	0-Not blocked	
Lowest status	66-Delivered		CO stop	3-Credit limit 3	
Highest status	66-Delivered				

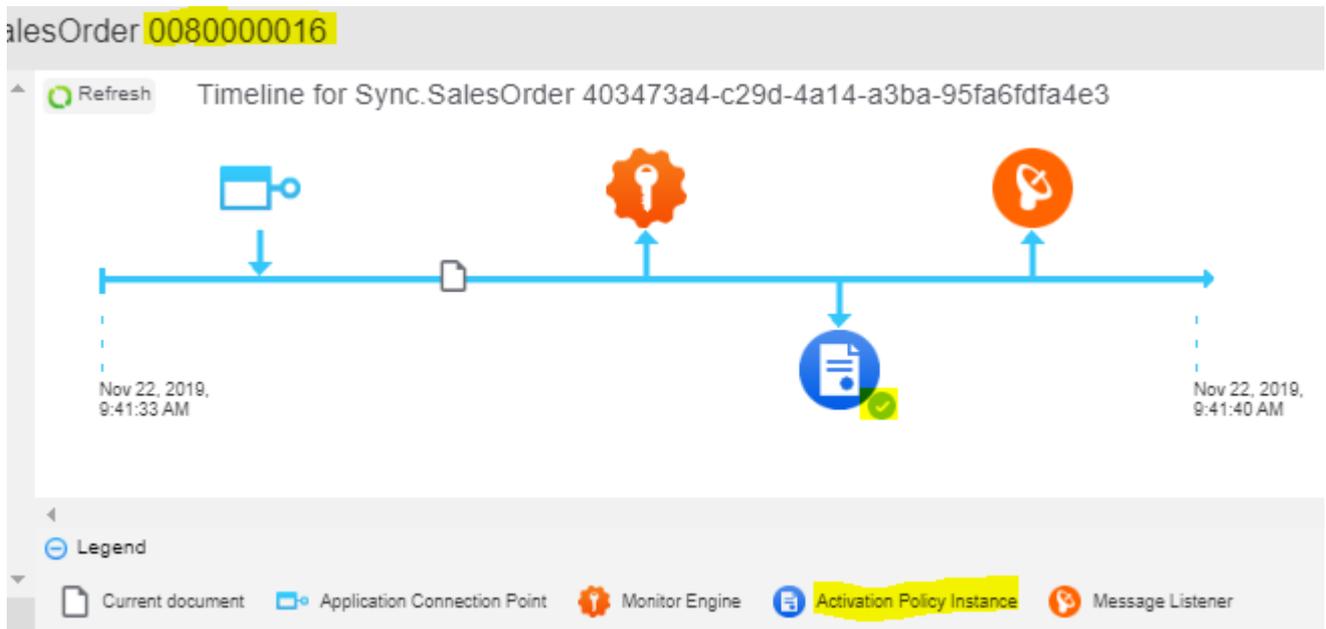
References

CO resp	SBINET	SEBASTIEN BINET - AUTHENTIC GROUP
Salesperson	BMEDEZ	BRYAN MENDEZ -
Quotation no		
Contact method		To configure
Cust order dt	191121	
Customer's ord		
Our reference	Food & Beverage Admin User	
Your ref 1	Your Ref on Address	
Business chain	Y10000	
Orig inv ref		2019

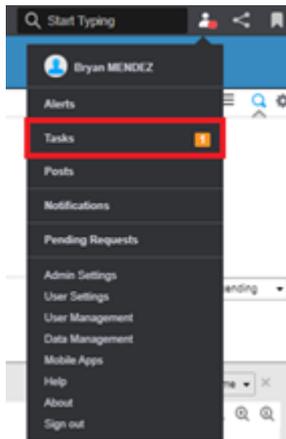
The **salesperson** is BMELENZ.

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 :

My Tasks (1)

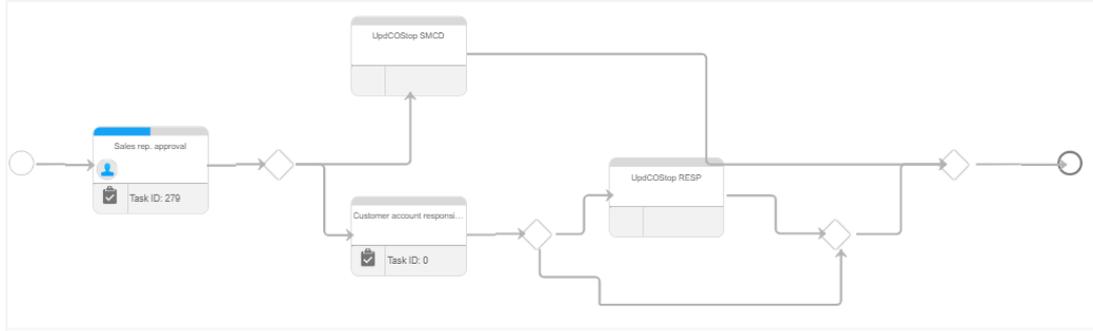


BMELENZ, do you wish to approve the credit limit exceeding ?

Today at 09:41



Show Details | Share



Click on **Show Details** :

My Tasks (1)



BMENDEZ, do you wish to approve the credit limit exceeding ?

Today at 09:41

[Show Details](#) | [Share](#)

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
X

BMENDEZ, do you wish to approve the credit limit exceeding ?

1
 Today at 09:41

UNASSIGN
ASSIGN

[inforPulseTask:279](#) [#inforPulseWorkflow:196](#)

APPROVE
REJECT

Parameters

ORNO:	0080000016	SMCD:	BMENDEZ
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Attachments

Add Attachments

Workflow Progress Indicator

Bryan
MENDEZ

Task

SBINET, do you wish to approve the credit limit exceeding ?

Today at 10:01

UNASSIGN **ASSIGN**

inforPulseTask:280 #inforPulseWorkflow:196

APPROVE **REJECT**

Parameters

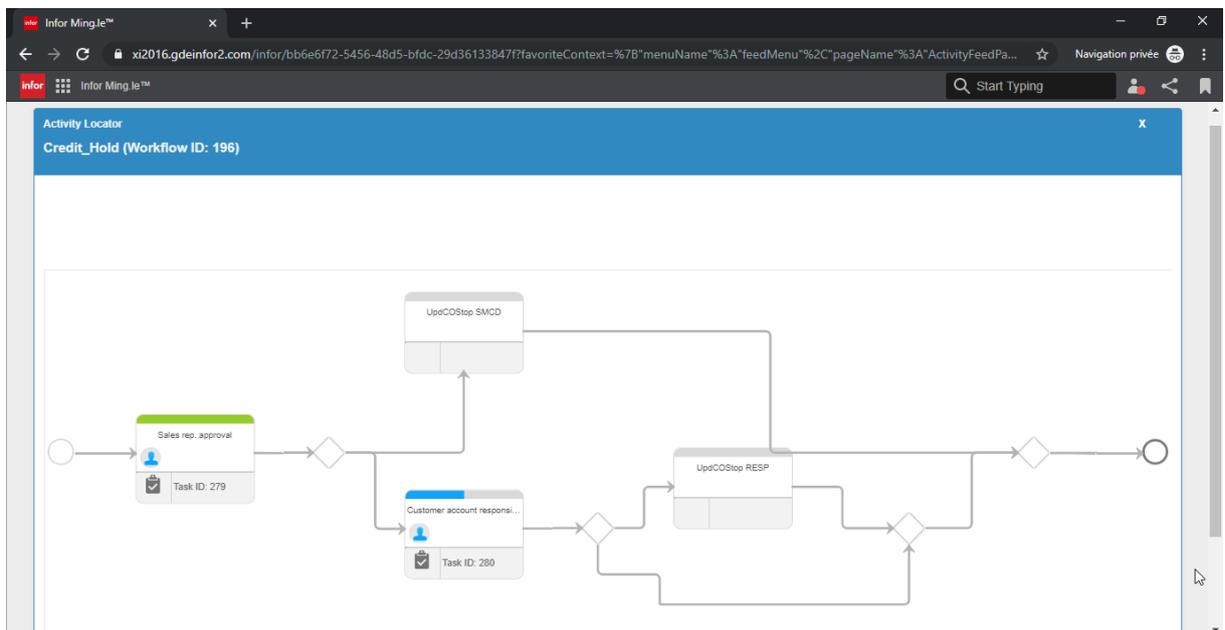
ORNO: 0080000016 RESP SBINET

Attachments

Add Attachments

Workflow Progress Indicator

Bryan MFJNF7 Sébastien RINFT



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

The screenshot shows the SAP Customer Order Open interface. At the top, there is a 'Menu' button and the title 'Customer Order. Open'. Below this is a toolbar with various icons for actions like '+', list, edit, delete, print, refresh, and calendar. The main content is divided into two sections: 'Panel Header' and 'Order Details'.

Panel Header:

Customer	Y11000	Retail Chain 1 - California Branch	CO type	F31	Adjustment -ve
CO no	0080000016		Customer stop	0-Not blocked	
Lowest status	66-Delivered		CO stop	9-Man rel order	
Highest status	66-Delivered				

Order Details:

Payer	Y10000	Retail Chain 1 - Head Office	Abnormal demand	<input type="checkbox"/>
Inv recipient	Y10000	Retail Chain 1 - Head Office		
Facility	A01	Main facility (DIV AAA)		
Warehouse	001	MAIN warehouse (Facility A01)		

Order Dates:

Req delivery dt	100305	1000	PCT	Order date	191121	CST
Req delivery dt	100305	1200	CST	Cust order dt	191121	CST
First/last date	100305	/	100305			CST

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

The screenshot shows a task notification in SAP. The task title is 'Task'. The message text is 'BMELENZ, do you wish to approve the credit limit exceeding ?'. Below the message, there is a red box highlighting a purple icon with a white document symbol and the number '1'. The notification also includes the text 'today at 09:41' and the links 'inforPulseTask:279' and '#inforPulseWorkflow:196'. Below the notification, there is a section for 'Parameters' with the following values: ORNO: 0080000016, SMCD: BMELENZ.

This is a close-up screenshot of the task notification. It shows the 'Task' title and the message 'BMELENZ, do you wish to approve the credit limit exceeding ?'. The purple icon with the number '1' is highlighted. Below the icon, the text 'OIS100' is visible, along with the links 'inforPulseTask:279' and '#inforPulseWorkflow:196'.

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

Menu
Customer Order. Open

ACTIONS ▾ OPTIONS ▾ RELATED ▾ TOOLS ▾

Panel Header

Customer	Y11000	Retail Chain 1 - California Branch	
CO no	0080000016	CO type	F31 Adjustment -ve
Lowest status	66-Delivered	Customer stop	0-Not blocked
Highest status	66-Delivered	CO stop	9-Man rel order

Order Details

Payer	Y10000	Retail Chain 1 - Head Office	
Inv recipient	Y10000	Retail Chain 1 - Head Office	
Facility	A01	Main facility (DIV AAA)	
Warehouse	001	MAIN warehouse (Facility A01)	

Abnormal demand

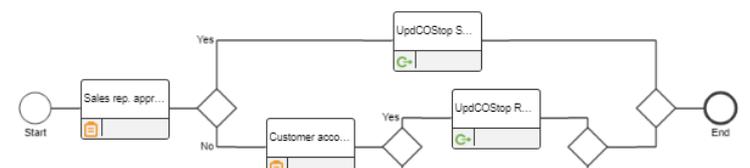
Order Dates

Req delivery dt	100305	1000 PCT	Order date	191121 CST
Req delivery dt	100305	1200 CST	Cust order dt	191121 CST
First/last date	100305	/ 100305 CST		

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)



Workflow Properties

Parameters Drill Backs Structures

	Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
<input type="checkbox"/>	Location	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	AccountingEntity	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Valid	STRING			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0
<input type="checkbox"/>	FACI	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	ORNO	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	OBLC	INTEGER			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9

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

Edit Drill Back

Name *

Application *
 Infor M3 - 13.3

View *
 Customer Order. Open - OIS100

Name	Value	Parameter
LogicalId *	<input type="radio"/> Required	<input checked="" type="radio"/> LogicalID
AccountingEntity	<input type="radio"/> <input type="text"/>	<input checked="" type="radio"/> AccountingEntity
Location	<input type="radio"/> <input type="text"/>	<input checked="" type="radio"/> Location

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

<input type="checkbox"/>	Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
<input type="checkbox"/>	Location	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	LogicalID	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	AccountingEntity	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

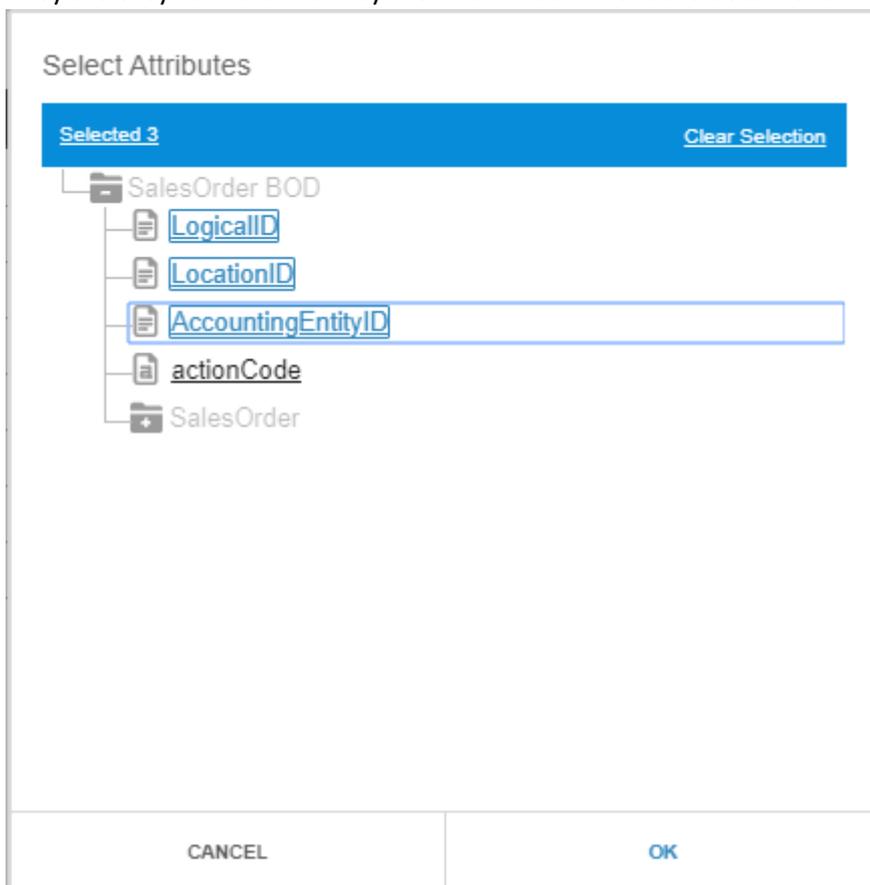
Now we need to get the values of those parameters.

In the **Activation policy**, under the **Attribute** tab, we will add the 3 new attributes.

+

<input type="checkbox"/>	Name	Path	Filter	Data Type
<input type="checkbox"/>	AccountingEntityID	(SalesOrder) DataArea*/AccountingEntityID	<input type="checkbox"/>	STRING
<input type="checkbox"/>	DocID	SalesOrder/SalesOrderHeader/DocumentID/ID	<input type="checkbox"/>	STRING
<input type="checkbox"/>	FACI	SalesOrder/SalesOrderHeader/UserArea/UserSegment/Properties/FACI	<input type="checkbox"/>	STRING
<input type="checkbox"/>	LocationID	(SalesOrder) DataArea*/LocationID	<input type="checkbox"/>	STRING
<input type="checkbox"/>	LogicalID	(SalesOrder) ApplicationArea/Sender/LogicalID	<input type="checkbox"/>	STRING
<input type="checkbox"/>	OBLC	SalesOrder/SalesOrderHeader/UserArea/UserSegment/Properties/OBLC	<input type="checkbox"/>	STRING
<input type="checkbox"/>	RESP	SalesOrder/SalesOrderHeader/UserArea/UserSegment/Properties/RESP	<input type="checkbox"/>	STRING
<input type="checkbox"/>	SMCD	SalesOrder/SalesOrderHeader/UserArea/UserSegment/Properties/SMCD	<input type="checkbox"/>	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**.

Edit Drill Back

Name *

Application *
 Infor M3 - 13.3

View *
 Customer Order. Open - OIS100

Name	Value	Parameter
LogicalId *	<input type="radio"/> Required	<input checked="" type="radio"/> LogicalID
AccountingEntity	<input type="radio"/> <input type="text"/>	<input checked="" type="radio"/> AccountingEntity
Location	<input type="radio"/> <input type="text"/>	<input checked="" type="radio"/> Location

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 :

Task Properties

Task **Content** Actions Distribution Escalation and Reminders Completion Properties

Use custom form

Select which workflow parameters/drill backs/structures will be displayed:

<input type="checkbox"/>	Type	Name	Data Type	
<input type="checkbox"/>	Parameter	Location	STRING	
<input type="checkbox"/>	Parameter	AccountingEntity	STRING	
<input type="checkbox"/>	Parameter	LogicalID	STRING	
<input type="checkbox"/>	Parameter	OBLC	INTEGER	

<input type="checkbox"/>	Type	Name	Label	Read-Only
<input type="checkbox"/>	Parameter	ORNO	ORNO	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Parameter	SMCD	SMCD	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Drill Back	OIS100	OIS100	<input checked="" type="checkbox"/>

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