



## DESCRIPTION - WORKFLOW TEMPLATE TUTORIAL/EXAMPLE

### BUSINESS REQUIREMENT

O/E Order needs to be approved if one or more lines on the order have a margin less than 10%

### KEY LEARNINGS

Workflow.CheckSalesMargin.py

Action returns False if one or more lines have a margin lower than the warning margin

Parameter 1 is the warning margin – To be configured in the workflow templates when the action is included in a step.

### SAMPLE FILES

Scripts are included in a module orchidtraining.workflow.vi

Go to Extender Setup > Modules > Import.

Continue the setup as per below.

Requires Extender PU6.00 or above

## CHECK SALES MARGIN SAMPLE SCRIPT

For details on configuring workflow templates, refer to F1 help and online help

The custom action has one parameter, the warning percent.

The parameter can be configured in the workflow action or can be set in View Events, Scripts and Workflow.

## SETUP

Upload the script, Create a workflow template, the custom action is available to use in the workflow.

Attach the workflow template to OE0520 (Order Header View).

## EXAMPLE

See O/E Approval workflow template in Orchid Workflow sample data for a detailed example.

The screenshot displays the 'ORCEWF - Extender Workflow Templates' application window. The main area shows a workflow template configuration for 'OE Order Approval with Custom Actions'. The template is active and can be started manually. The workflow steps are listed in a table below.

Lin...	Step Name	Description	Entry Step	Parameter 1 is	Parameter 2 is	Parameter 3
1	Start	Determine branch for Insert, Upd and On h...	Yes	User who can approve		
2	StartNewOrder	When OE Order is inserted	No			
3	DeactivateOrder	When setting an order to On hold	No			
4	ActivateOrder	When status is set to Off hold	No			
5	ReactivateOrder	Make an on hold order active	No			
6	WaitNew	Wait for user to approve/reject new Order	No			
7	WaitReactivate	Wait for user to Approve/reject request to r...	No			
8	Approve	Approve, set new Order to Offhold/Active ...	No	Comment from previous step		
9	Reject	Reject and complete workflow	No			
10	ErrorManagement	Used to alert Admin users of critical error	No			
11	WaitError	Wait step after critical error	No			

Below the steps table, there is a 'Step Actions - Executed when a workflow enters this step' section. It contains a table of actions and their parameters.

Lin...	Action #	Action Name	Parameter 1	Parameter 2	Parameter 3	True Action #	False Action #	Comment
1	10	ORCHIDTRAINING Workflow check SalesMargin	{WARNINGMARGIN}			90	20	If check is false, a line has a low m...
2	20	SetStatus	NewOrder			30		
3	30	SetField	(ONHOLD)	1		35	110	Set to Inactive when inserted so it c...
4	35	SetField	(HOLDREASON)	Some lines have a...		40		
5	40	Evaluate	(PROGRAM)	*	(WFFPROGRAM)	50	60	If view is called from Sage 300 prog...
6	50	ShowUserMessage	Order has been put on hold until approved			60		Display message to user - Best to di...
7	60	AssignColour				70		Assign colour for the console
8	70	AssignUser	(APPROVER)			80	90	Assign user for console and next ste...
9	80	SendEmail	ORCHIDTRAINING.OENEWTEMPLATE	(CURUSER)	ADMIN	120	120	
10	90	SetStatus	NoApproval_Newinc			100	100	New Income statement, no approve...
11	100	Complete				0	0	Complete the workflow
12	110	GoToStep	ErrorManagement			0	0	Go to Error Management Step if criti...
13	120	GoToStep	WaitNew			0	0	Go to wait step to leave the wf on t...

On the right side, there is a 'Workflow Values' table.

Name	Value
APPROVER	
WARNINGMARGIN	10
WFCOMMENT	
WFEMAILCC	nath
WFOPFLDVIEW	OE0
WFFPROGRAM	OE1

You can also set the Warning Percent directly in the workflow action – Replace {WARNINGPERCENT} parameter set in View Events, Scripts and Workflow with the value.

## Extender Workflow Example

The screenshot shows the 'Step Action' configuration window for Line 10. The window has a title bar with a yellow icon and the text 'Step Action'. It contains several input fields and buttons. The 'Line Number' field is set to 10. The 'Action #' field is set to 10. The 'Action Name' field is set to 'ORCHIDTRAINING.Workflow.checkSalesMargin'. The 'Parameter 1' field is set to '{WARNINGMARGIN}' and is highlighted with an orange border. The 'Parameter 2' field is empty. The 'Parameter 3' field is empty. The 'Parameter 4' field is empty. The 'True Action #' field is set to 90. The 'False Action #' field is set to 20. The 'Comment' field is set to 'If check is false, a line has a low margin, request approval'. At the bottom, there are three buttons: 'Save', 'Delete', and 'Close'. A 'Help' link is visible in the top right corner.

Line Number	10
Action #	10
Action Name	ORCHIDTRAINING.Workflow.checkSalesMargin
Parameter 1	{WARNINGMARGIN}
Parameter 2	
Parameter 3	
Parameter 4	
True Action #	90
False Action #	20
Comment	If check is false, a line has a low margin, request approval

The screenshot shows the 'Step Action' configuration window for Line 4. The window has a title bar with a yellow icon and the text 'Step Action'. It contains several input fields and buttons. The 'Line Number' field is set to 4. The 'Action #' field is set to 35. The 'Action Name' field is set to 'ORCHIDTRAINING.Workflow.getOptField'. The 'Parameter 1' field is set to 'GL0400'. The 'Parameter 2' field is set to 'CASHFLOWTYPE'. The 'Parameter 3' field is set to '{WFCASHFLOWTYPE}'. The 'Parameter 4' field is empty. The 'True Action #' field is set to 40. The 'False Action #' field is set to 40. The 'Comment' field is set to 'Save the Cashflowtype optional field value in workflow value'. At the bottom, there are three buttons: 'Save', 'Delete', and 'Close'. A 'Help' link is visible in the top right corner.

Line Number	4
Action #	35
Action Name	ORCHIDTRAINING.Workflow.getOptField
Parameter 1	GL0400
Parameter 2	CASHFLOWTYPE
Parameter 3	{WFCASHFLOWTYPE}
Parameter 4	
True Action #	40
False Action #	40
Comment	Save the Cashflowtype optional field value in workflow value

When you post an order where one line has a margin less than the percent configured, the workflow starts and the order is put on hold.