

Workflows and Business Events Webinar

2021R1 demo site

Acumatica's Doug Johnson did a YouTube video that was the inspiration for today's webinar:
https://www.youtube.com/watch?v=0N_42J51p3Q

Demo Script

1. The purpose of this webinar is to show a light to medium complexity workflow that injects an Inspection step into the Shipments screen
 - a. PowerPoint presentation
 - i. Review Workflow slide
 - b. Add customer Attributes (User Defined Fields) and associate them to the Shipments screen (review existing)
 - i. Inspector
 - ii. Inspection Status
 - c. Add a Business Event to send an email when the Inspection Request button or Action is engaged (review existing)
 - d. Pass/Fail decision tree via buttons or Actions
2. Open Shipments screen
 - a. Review non-customized default workflow for the standard Shipment process
 - b. Associate Attributes to Shipments screen
 - c. Open State Diagram: Customizations > Show State Diagram
 - i. This screen can be daunting at first but hopefully by the end of the webinar you will see the power
 - d. Customize Workflow
 - i. Select the PCBWorkflowWebinar (or create a 'new' customization project)
 1. Expand the SCREENS tree all the way
3. Add new Workflow "Shipment Inspection"

Operation: Extend System Workflow

* Base Workflow: Default workflow

Workflow Type: DEFAULT

* Workflow Name: Shipment Inspection

OK CANCEL

- a.
 - b. Mark as the 'Default'
4. Create new Actions
 - a. RequestInspection

Action Properties

Action Name: RequestInspection
 Display Name: Inspection Request
 Disabled:
 Hidden:
 Dialog Box:
 Processing Screen: Batch Mode

Action Type: Workflow
 Toolbar Folder: Actions
 Rights to Enable Action: Update
 Rights to View Action: Expose to Mobile

FIELD UPDATE

Active	Field	From Schema	New Value	Status
No records found. Try to modify parameters above to see records here.				

OK CANCEL

- i.
- b. InspectPass
 - i. <same as above w/different Display Name>
- c. InspectFail
 - i. <same as above w/different Display Name>
- 5. Add a new Workflow State
 - a. Click the “+” button then click “Add State”
 - b. Identifier = Z (this identifier just sets the position in the States and Transitions tree)
 - c. Description = Inspect
 - d. Add Attribute fields to the State Properties tab
 - i. INSPECTOR
 - ii. INSPCTSTAT
 - e. Click on the Diagram View to add the Transitions to the On Hold and Open States
 - i. Create transition from Inspect state to Open state by clicking ellipses button then Add Transition
 - ii. Add the Pass/Fail Transitions
 - 1. Click the “+” button then click “Add Transition”
 - 2. Click Create button
 - 3. Do this for both the Pass and Fail decisions
 - a. Trigger Name: Shipment Inspection Fail

i.

b. Trigger Name: Shipment Inspection Pass

i.

4. Add Transition from On Hold to Inspect state

a.

iii. Click on the Transitions in the tree

1. Add the Attribute fields in the “Fields to Update After Transition” grid

a. For Fail

i. INSPECTOR

1. Select “From Schema”

2. New Value = EmployeeID: EP00000002

ii. INSPCTSTAT

1. Select “From Schema”

2. New Value = Fail (2)

b. For Pass

i. INSPECTOR

1. Select “From Schema”

2. New Value = EmployeeID: EP00000002

ii. INSPCTSTAT

1. Select “From Schema”

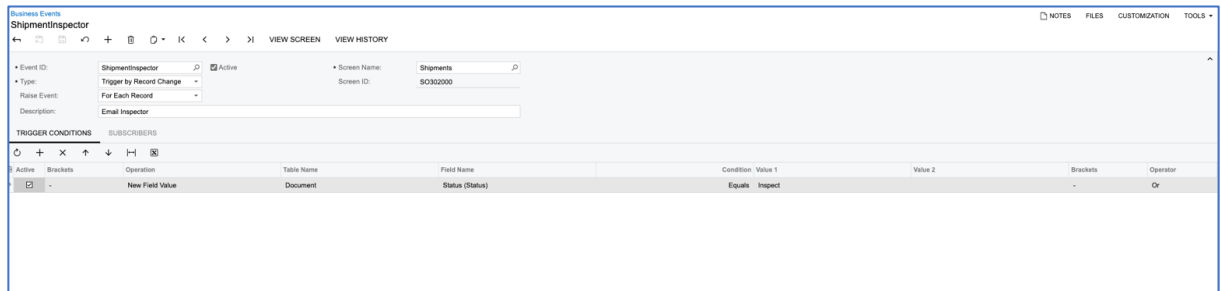
2. New Value = Pass (1)

iv. NOTE: add and disable the Inspector/Inspection Status attributes for all other States & Transitions except “Inspect”

6. At this point the Workflow is defined and needs to be published in order to then add the Business Event

7. Open the above Workflow after it has been Published

8. Add a new (existing) Business Event to send the email when the Inspection is Requested
 - a. Notification Template



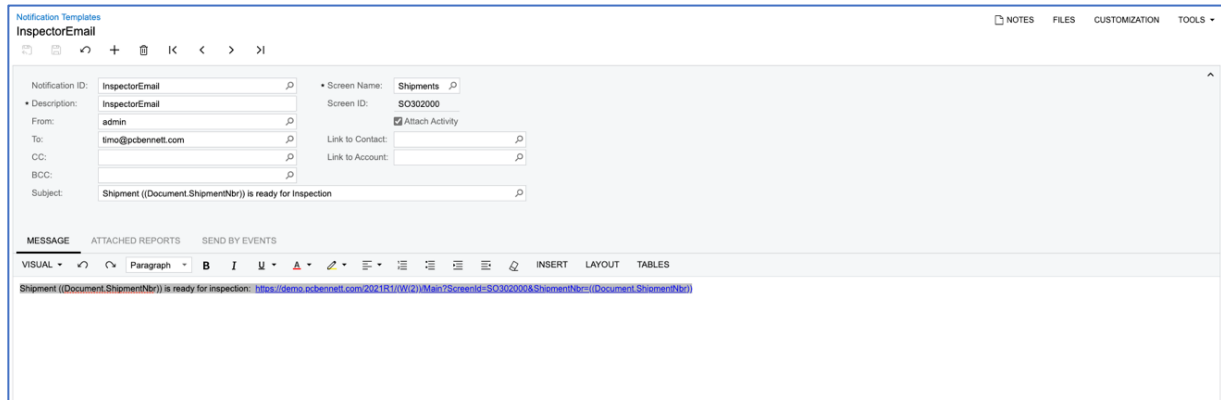
Business Events
ShipmentsInspector

Event ID: ShipmentsInspector | Active | Screen Name: Shipments | Screen ID: SO302000

Type: Trigger by Record Change | Raise Event: For Each Record | Description: Email Inspector

Active	Brackets	Operation	Table Name	Field Name	Condition	Value 1	Value 2	Brackets	Operator
<input checked="" type="checkbox"/>	-	New Field Value	Document	Status (Status)	Equals	Inspect		-	Or

- b.
- c. Subscriber (email)



Notification Templates
InspectorEmail

Notification ID: InspectorEmail | Description: InspectorEmail | Screen Name: Shipments | Screen ID: SO302000

From: admin | To: tmo@pcbennett.com | CC: | BCC: | Subject: Shipment ((Document.ShipmentNbr)) is ready for inspection

Link to Contact: | Link to Account: | Attach Activity:

MESSAGE | ATTACHED REPORTS | SEND BY EVENTS

VISUAL | Paragraph | B | I | U | A | INSERT | LAYOUT | TABLES

Shipment ((Document.ShipmentNbr)) is ready for inspection: [https://demo.pcbennett.com/2021R1/W/21/Main?ScreenId=SO302000&ShipmentNbr=\(\(Document.ShipmentNbr\)\)](https://demo.pcbennett.com/2021R1/W/21/Main?ScreenId=SO302000&ShipmentNbr=((Document.ShipmentNbr)))

- d.
9. <THE END>