

# Machine Maintenance Workflow States

## Machine Maintenance Completion Workflow

Active

Go to Machine Maintenance List



Save

- Assigned To +
- Attachments +
- Tags +
- Share +



Edit your workflow visually using the Workflow Builder.

Workflow Builder allows you to create workflows visually. You can drag and drop states and link them to create transitions. Also you can update their properties from the sidebar.

NOTE: If you add states or transitions in the table, it will be reflected in the Workflow Builder but you will have to position them manually. Also Workflow Builder is currently in BETA.

Workflow Builder >

0 · 0 FOLLOW

You last edited this · 17 hours ago

Tester@gmail.com created this · yesterday

Document Type \*

Machine Maintenance

DocType on which this Workflow is applicable.

Is Active

If checked, all other workflows become inactive.

Don't Override Status

If Checked workflow status will not override status in list view

Send Email Alert

Emails will be sent with next possible workflow actions

### States

Different "States" this document can exist in. Like "Open", "Pending Approval" etc.

#### Document States

All possible Workflow States and roles of the workflow. Docstatus Options: 0 is "Saved", 1 is "Submitted" and 2 is "Cancelled"

<input type="checkbox"/>	No.	State *	Doc Status	Update Field	Update Value	Only Allow Edit For *	
<input type="checkbox"/>	1	Draft	0	status	Draft	Technician	
<input type="checkbox"/>	2	Scheduled	0	status	Scheduled	Technician	
<input type="checkbox"/>	3	Completed	0	status	Completed	Technician	
<input type="checkbox"/>	4	Closed	1			Maintenance Manager	

## Transition Rules Machine Maintenance

### States

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#### Document States

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<input type="checkbox"/>	No.	State *	Doc Status	Update Field	Update Value	Only Allow Edit For *	
<input type="checkbox"/>	1	Draft	0	status	Draft	Technician	
<input type="checkbox"/>	2	Scheduled	0	status	Scheduled	Technician	
<input type="checkbox"/>	3	Completed	0	status	Completed	Technician	
<input type="checkbox"/>	4	Closed	1			Maintenance Manager	

[Add Row](#)

### Transition Rules

Rules for how states are transitions, like next state and which role is allowed to change state etc.

#### Transitions

Rules defining transition of state in the workflow.

<input type="checkbox"/>	No.	State *	Action *	Next State *	Allowed *	
<input type="checkbox"/>	1	Draft	Schedule	Scheduled	Technician	
<input type="checkbox"/>	2	Scheduled	Complete	Completed	Technician	
<input type="checkbox"/>	3	Completed	Close	Closed	Maintenance Manager	

[Add Row](#)

Workflow State Field \*

workflow\_state

Home

T

Projects

Quotations

Orders

Invoices

Shipments

Issues

Addresses

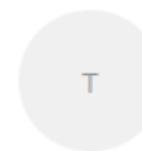
Timesheets

Newsletter

Material Request

My Account

# My Account



Technician

Edit Profile

## Reset Password

Reset the password for your account

Reset Password

## Manage third party apps

To manage your authorized third party apps

Manage your apps

Your email address...

Get Updates

# Creation of new Machine Maintenance



> Machine Maintenance > New Machine Maintenance

Q Search or type a command (Ctrl + G)



Help



## New Machine Maintenance Not Saved

Save

Details Notes

### Details

Machine Name \*

Maintenance Date

07-12-2025

Maintenance Type

Preventive

Completion Date

Technician \*

Status

Draft

### Parts Used

<input type="checkbox"/>	No.	Part	Quantity	Rate	Amount	
No Data						

Add Row

### Journal Entry

## Auto Calculation of Amount

### New Machine Maintenance

Not Saved

Save

Details Notes

#### Details

Machine Name \*

SKU001

Maintenance Date

07-12-2025

Maintenance Type

Preventive

Completion Date

Technician \*

Status

Draft

#### Parts Used

	No.	Part	Quantity	Rate	Amount	
<input type="checkbox"/>	1	SKU0101	2	₹ 400.00	₹ 800.00	
<input type="checkbox"/>	2	SKU0102	7.000	300.00	2,100.00	

Add Row

Cost

₹ 2,900.00

Journal Entry

## Draft to Schedule state

E > Machine Maintenance > MACH-25-0012

Search or type a command (Ctrl + G) Help T

**MACH-25-0012** Draft

Assigned To + Details Notes

Attachments +

Tags +

Share +

0 · 0 FOLLOW

You last edited this · just now

You created this · just now

**Details**

Machine Name \* SKU001

Maintenance Date 07-12-2025

Maintenance Type Preventive

Completion Date

Technician \* HR-EMP-00001

Status Draft

**Parts Used**

<input type="checkbox"/>	No.	Part	Quantity	Rate	Amount	<span>⋮</span>
<input type="checkbox"/>	1	SKU0101	2	₹ 400.00	₹ 800.00	<input type="checkbox"/>
<input type="checkbox"/>	2	SKU0102	7	₹ 300.00	₹ 2,100.00	<input type="checkbox"/>

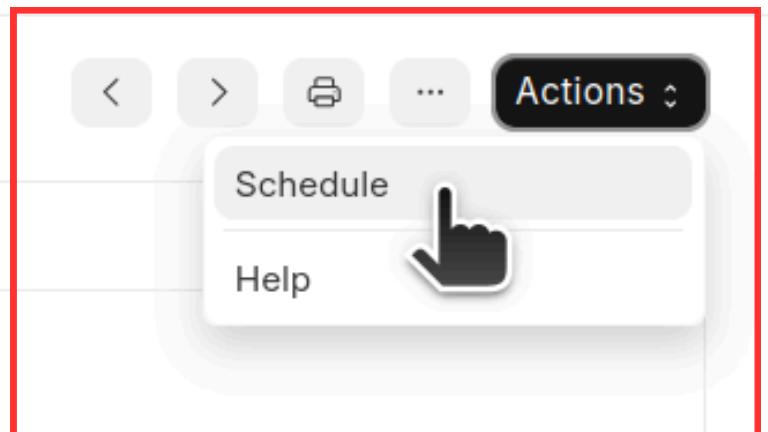
Add Row

Cost ₹ 2,900.00

Journal Entry

Schedule Help

Actions ⋮



## Complete Button & Complete after Scheduled

E > Machine Maintenance > MACH-25-0012

Search or type a command (Ctrl + G) | Help ▾ T

MACH-25-0012 Draft

Assigned To: + Details Notes

Attachments: +

Tags: +

Share: +

0 · 0 FOLLOW

You last edited this · just now

You created this · 3 minutes ago

Machine Name \*: SKU001

Maintenance Date: 07-12-2025

Maintenance Type: Preventive

Completion Date:

Technician \*: HR-EMP-00001

Status: Scheduled

Parts Used

No.	Part	Quantity	Rate	Amount
1	SKU0101	2	₹ 400.00	₹ 800.00
2	SKU0102	7	₹ 300.00	₹ 2,100.00

Add Row

Cost: ₹ 2,900.00

Journal Entry

Maintenance Completed Actions: Complete (highlighted with a red box and a hand cursor icon), Help

## Hides Notes after Scheduled

E > Machine Maintenance > MACH-25-0012

Search or type a command (Ctrl + G) | Help ▾ | T

MACH-25-0012 Draft

Maintenance Completed | Actions

Assigned To | Attachments | Tags | Share

Details Notes

Comments

Type a reply / comment

Activity

+ New Email

0 · 0 FOLLOW

You last edited this · 6 minutes ago

You created this · 9 minutes ago

Technician Scheduled · 6 minutes ago

Notification sent to Technician , iswariya169@gmail.com · Sent · 6 minutes ago

Hello User, Your machine maintenance is Scheduled. Thanks

You last edited this · 6 minutes ago

You created this · 9 minutes ago

^

## Action Completion and Completion data update

E > Machine Maintenance > MACH-25-0012

Search or type a command (Ctrl + G) | Help | T

### MACH-25-0012 Draft

< > Print ...

Assigned To + Details Notes

Attachments + Details

Tags + Machine Name \* Maintenance Date

Share + SKU001 07-12-2025

Preventive

Maintenance Type

Technician \* Completion Date

HR-EMP-00001 07-12-2025

Status

Completed

0 FOLLOW

You last edited this · just now

You created this · 1 hour ago

Parts Used

<input type="checkbox"/>	No.	Part	Quantity	Rate	Amount	<span>⋮</span>
<input type="checkbox"/>	1	SKU0101	2	₹ 400.00	₹ 800.00	<input type="button" value="Edit"/>
<input type="checkbox"/>	2	SKU0102	7	₹ 300.00	₹ 2,100.00	<input type="button" value="Edit"/>

Add Row

Cost

₹ 2,900.00

Journal Entry

Home

R

Addresses

Newsletter

My Account

## My Account



Riyash

Edit Profile

### Reset Password

Reset the password for your account

Reset Password

### Manage third party apps

To manage your authorized third party apps

Manage your apps



Your email address...

Get Updates

## Close Action after Completed

E > Machine Maintenance > MACH-25-0012

Q Search or type a command (Ctrl + G)



Help ▾

R

### MACH-25-0012

Draft

Assigned To +

Attachments +

Tags +

Share +

0 · FOLLOW

Technician last edited this ·  
2 hours ago

Technician created this · 3  
hours ago

Details Notes

#### Details

Machine Name \*

SKU001

Maintenance Date

07-12-2025

Maintenance Type

Preventive

Status

Completed

Technician \*

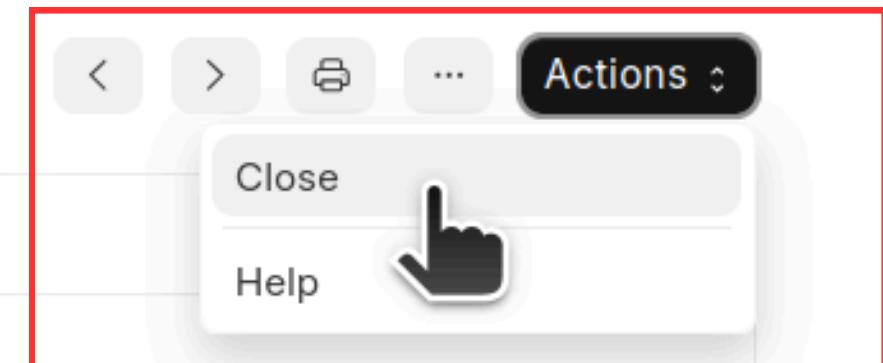
HR-EMP-00001

#### Parts Used

	No.	Part	Quantity	Rate	Amount	⚙
	1	SKU0101	2	₹ 400.00	₹ 800.00	
	2	SKU0102	7	₹ 300.00	₹ 2,100.00	

#### Cost

₹ 2,900.00



## Journal Entry & Submitted after Closed

E > Machine Maintenance > MACH-25-0012

Search or type a command (Ctrl + G) | Help ▾ R

MACH-2012 Submitted

Assigned To + Details Notes

Attachments + Details

Tags + Machine Name \* Maintenance Date

Share + SKU001 07-12-2025

Maintenance Type Status

Preventive Completed

Technician \* Status

HR-EMP-00001 Completed

You last edited this · just now

Technician created this · 3 hours ago

Parts Used

	No.	Part	Quantity	Rate	Amount	⋮
	1	SKU0101	2	₹ 400.00	₹ 800.00	⋮
	2	SKU0102	7	₹ 300.00	₹ 2,100.00	⋮

Cost ₹ 2,900.00

Journal Entry ACC-JV-2025-00009

Comments

# Journal Entry Creation

E > Accounting > Journal Entry > ACC-JV-2025-00009

Q Search or type a command (Ctrl + G)



Help ▾

R

## Maintenance Expense Account - A Journal Entry

View ▾

Actions ▾



Cancel

- Assigned To +
- Attachments +
- Tags +
- Share +

### Connections ▾

Entry Type \*

Journal Entry

Company \*

ABC

Posting Date \*

07-12-2025

0 · FOLLOW

You last edited this · just now

You created this · just now

### Accounting Entries

No.	Account *	Party Type	Party	Debit	Credit	⚙
1	Maintenance Expense...			₹ 2,900.00	₹ 0.00	0
2	Cash - A			₹ 0.00	₹ 2,900.00	0

### User Remark

Auto entry for Machine Maintenance MACH-25-0012

Total Debit

₹ 2,900.00

Total Credit

₹ 2,900.00

Multi Currency

### Reference ▾

#### Remark

Note: Auto entry for Machine Maintenance MACH-25-0012