

infor®



2025 SUN CONFERENCE: HANDS ON LAB

Workflows & AES

Mary Zecca

Technical Solution Consultant

Feb 24: 4:00 PM – 5:00 PM Grand Ballroom F

Feb 26: 10:15 AM – 11:15 AM Grand Ballroom E



INDUSTRY SPECIFIC

CLOUDSUITE SOLUTIONS



Agenda

01 Introduction & Access

02 Create Notification Workflow

03 Create External Workflow using Wizard

04 Test

Application Event System

PROS:

- Part of Syteline, direct access
- No code development tool
- Built in inbox & email

CONS:

- Can seem complex to use/learn
- Requires deep understanding of MG & CSI Data

Intelligent Open Network

PROS:

- Application Independent
- Graphical user interface
- Centralized inbox, email & mobile app

CONS:

- Reactive, uses BODs as triggers
- Requires understanding of APIs to “write back” to ERP

Application Event System & Intelligent Open Network

PROS:

- Part of Syteline, direct access
 - No code development tool
 - Graphical user interface
- Centralized inbox, email & mobile app
- Requires less understanding of MG & CSI Data
 - No need to understand APIs
- Fully bi-directional, no longer just reactive
 - Overall, less complex

Login Information

Monday
Feb. 24th @ 4pm

Username:

D1S11RF_XX

Password:

SUNConf\$tuD1S11XX

Replace XX with your student number

Wednesday
Feb. 26th @ 10:15am

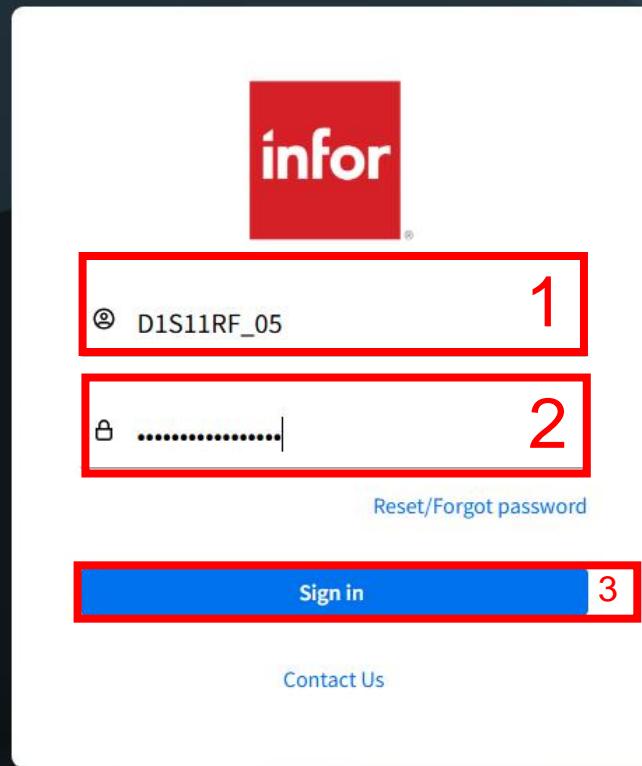
Username:

D3S11RE_XX

Password:

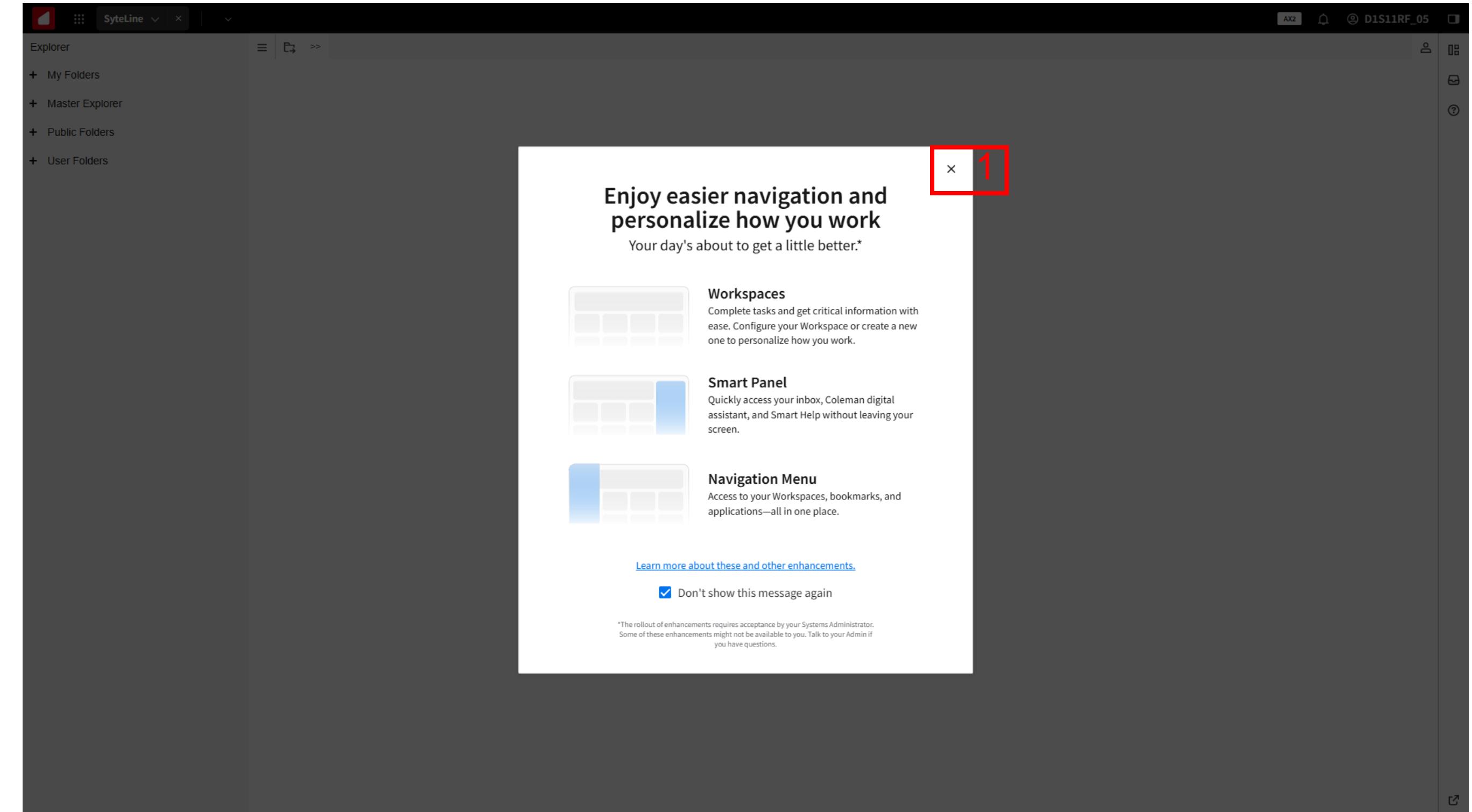
SUNConf\$tuD3S11XX

Replace XX with your student number



1. ENTER your username
2. ENTER your password
3. SELECT Sign in





1. CLICK the X at the top right to close the message

The screenshot shows the SyteLine application interface. At the top left is a navigation menu icon (1). The top bar includes the 'SyteLine' logo and a search bar containing the text 'Q os' (2). The main content area displays a list of 'Applications' (3) under the heading '6 results'. The applications listed are: Document Management OS, API Gateway OS, ION OS, Mongoose OS, and Health Service OS. A red box highlights the search bar and the application list. A red circle with the number '8' is located in the top right corner.

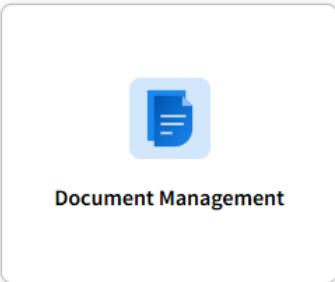
1. CLICK on the Navigation Menu in the top left
2. ENTER 'OS' in the search bar
3. SELECT OS under Applications



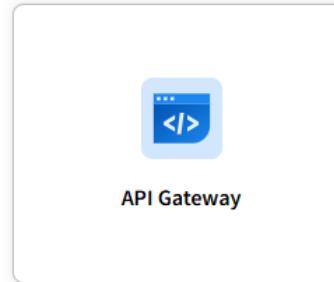
[Home](#)[Document Management](#)[API Gateway](#)[ION](#)[Mongoose](#)[Health Service](#)

OS

Configure and maintain important parts of your CloudSuite here



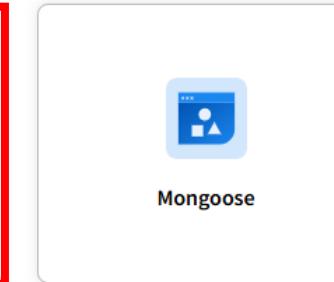
Document Management



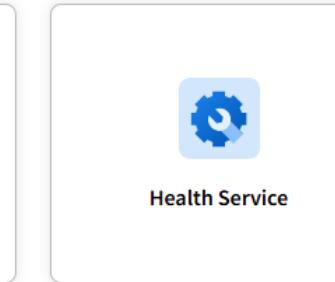
API Gateway



ION



Mongoose

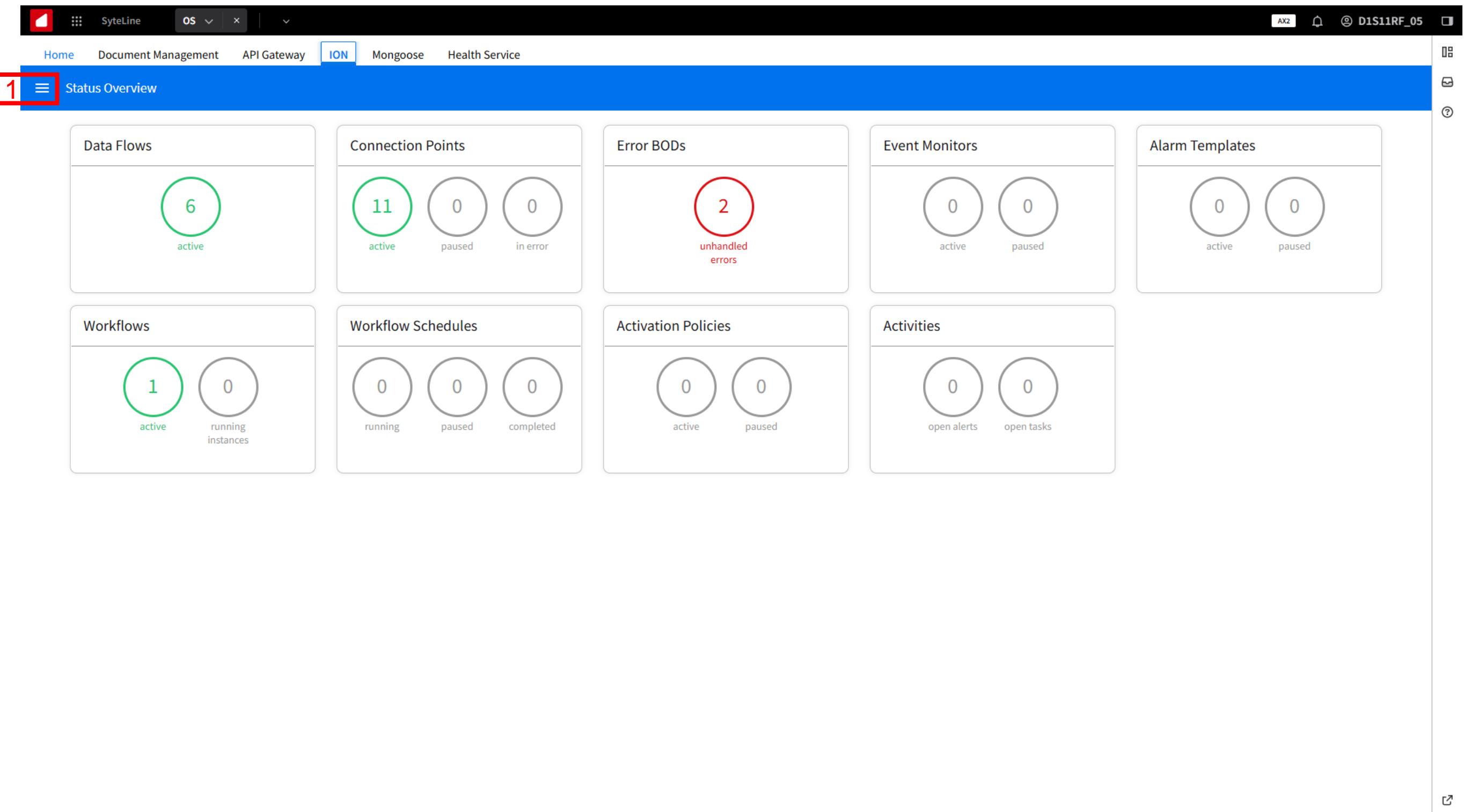


Health Service

1

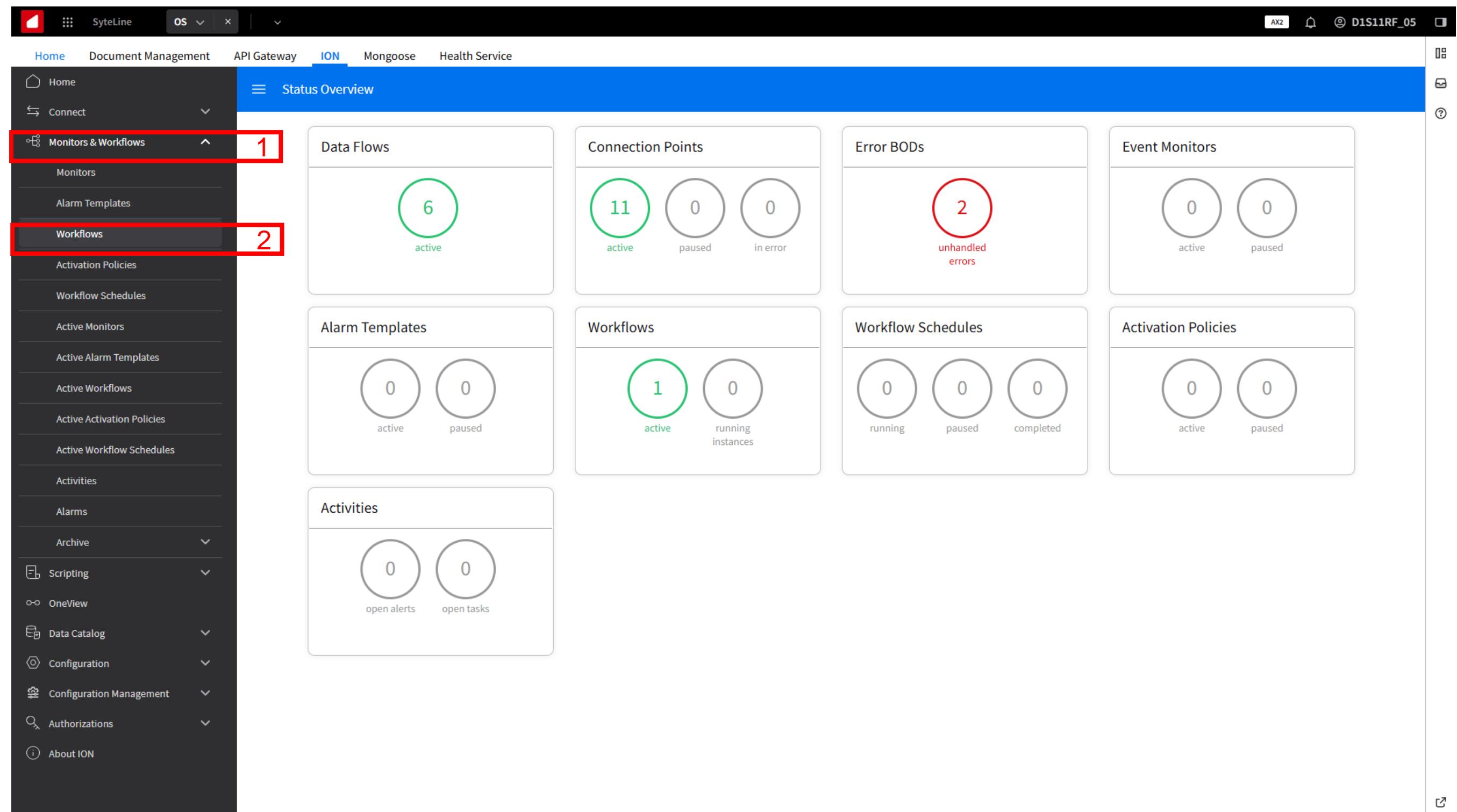


1. CLICK on ION



1. CLICK the Explorer button next to Status Overview





1. **SELECT** Monitors & Workflows
2. **SELECT** Workflows



The screenshot shows the ION Workflows interface. At the top, there is a navigation bar with icons for SyteLine, OS, and various services like API Gateway, ION, Mongoose, and Health Service. On the far right, there are icons for AX2, a bell, and a user profile. A red circle in the top right corner contains the number 12. The main area is titled "Workflows" and displays a grid of 18 workflow templates. Each template card includes the name, status (Inactive), date (2025 Jan 25), version (1), and a note about being a workflow template. A large red box highlights the search bar at the top right of the grid.

Name	Status	Date	Version	Description
D1S11RF_00	Inactive	2025 Jan 25	1	D1S11RF_00's workflow template.
D1S11RF_01	Inactive	2025 Jan 25	1	D1S11RF_01's workflow template.
D1S11RF_02	Inactive	2025 Jan 25	1	D1S11RF_02's workflow template.
D1S11RF_03	Inactive	2025 Jan 25	1	D1S11RF_03's workflow template.
D1S11RF_04	Inactive	2025 Jan 25	1	D1S11RF_04's workflow template.
D1S11RF_05	Inactive	2025 Jan 25	1	D1S11RF_05's workflow template.
D1S11RF_06	Inactive	2025 Jan 25	1	D1S11RF_06's workflow template.
D1S11RF_07	Inactive	2025 Jan 25	1	D1S11RF_07's workflow template.
D1S11RF_08	Inactive	2025 Jan 25	1	D1S11RF_08's workflow template.
D1S11RF_09	Inactive	2025 Jan 25	1	D1S11RF_09's workflow template.
D1S11RF_10	Inactive	2025 Jan 25	1	D1S11RF_10's workflow template.
D1S11RF_11	Inactive	2025 Jan 25	1	D1S11RF_11's workflow template.
D1S11RF_12	Inactive	2025 Jan 25	1	D1S11RF_12's workflow template.
D1S11RF_13	Inactive	2025 Jan 25	1	D1S11RF_13's workflow template.
D1S11RF_14	Inactive	2025 Jan 25	1	D1S11RF_14's workflow template.
D1S11RF_15	Inactive	2025		
D1S11RF_16	Inactive	2025		
D1S11RF_17	Inactive	2025		
D1S11RF_18	Inactive	2025		

1. CLICK the Magnifying Glass and ENTER your username



The screenshot shows the Infor ION Workflows interface. The top navigation bar includes SyteLine, OS, ION (selected), Mongoose, and Health Service. A red circle in the top right corner contains the number 13. The left sidebar has a dark theme with categories like Home, Connect, Monitors & Workflows (which is expanded), Monitors, Alarm Templates, Workflows (selected), Activation Policies, Workflow Schedules, Active Monitors, Active Alarm Templates, Active Workflows, Active Activation Policies, Active Workflow Schedules, Activities, Alarms, Archive, Scripting, OneView, Data Catalog, Configuration, Configuration Management, Authorizations, and About ION. The main area is titled 'Workflows' and shows a single workflow named 'D1S11RF_05'. This card displays the status as 'Inactive', the date '2025 Jan 25', version '1', and usage information with a value of '1'. Below the card are standard file operations icons (Delete, Copy, Paste, Move, Refresh, Close). A search bar at the top right contains 'D1S11RF_05'.

1. SELECT the workflow that matches your username



The screenshot shows the ION interface for managing workflows. On the left, a sidebar lists various monitoring and workflow management options. The main area displays a workflow named "D1S11RF_05" with a simple diagram consisting of a start node connected to an end node. Below the diagram, the "Workflow Properties" section is visible, featuring tabs for Parameters, Drill Backs, Structures, Authorizations, and Service Account. A red arrow points upwards from the bottom of the "Workflow Properties" section towards the top of the screen, indicating where to click and drag to increase the window size.

Workflow D1S11RF_05

Name: D1S11RF_05

Description: D1S11RF_05's workflow template.

Inactive

Version 1

Last Updated by: SUNConf Admin

Last Updated on: Jan 25, 2025, 4:29:48 PM

Last Activated on:

Show Workflow Properties

Notifications: 1

D1S11RF_05
The workflow must not be empty.

Workflow Properties

Parameters

	Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
+								

No data to display.

1. CLICK and DRAG the Workflow properties screen to increase the size

The screenshot shows the ION platform interface for workflow management. The top navigation bar includes SyteLine, OS, and various service links like API Gateway, ION, Mongoose, and Health Service. A red circular badge in the top right corner indicates 15 notifications.

The left sidebar contains a navigation tree under 'Monitors & Workflows' with categories such as Home, Connect, Monitors, Alarm Templates, Workflows, Activation Policies, Workflow Schedules, Active Monitors, Active Alarm Templates, Active Workflows, Active Activation Policies, Active Workflow Schedules, Activities, Alarms, Archive, Scripting, OneView, Data Catalog, Configuration, Configuration Management, Authorizations, and About ION.

The main content area is titled 'Workflow D1S11RF_05'. It displays basic information: Name (D1S11RF_05), Description (D1S11RF_05's workflow template.), and Status (Inactive). It also shows Version 1 details: Last Updated by (SUNConf Admin), Last Updated on (Jan 25, 2025, 4:29:48 PM), and Last Activated on (No data to display).

The 'Parameters' section is highlighted with a red box around the '1 +' button. This section includes tabs for Parameters, Drill Backs, Structures, Authorizations, and Service Account. Below the tabs is a table header with columns: Name, Type, Code Name, Group, Input, Output, Use Initial Value if Null, and Initial Value. The table body displays a single row with a warning message: 'The workflow must not be empty.'

1. CLICK the '+' button under Parameters

The screenshot shows the Infor ION interface with the 'ION' tab selected. On the left, the navigation menu includes 'Home', 'Document Management', 'API Gateway', 'ION' (selected), 'Mongoose', and 'Health Service'. Under 'Monitors & Workflows', 'Workflows' is selected, showing 'D1S11RF_05' as the active workflow template. The workflow diagram consists of a single step from 'Start' to 'End'. A modal dialog titled 'Add Workflow Parameter' is open, containing fields for 'Name' (set to 'ApproveReject'), 'Type' (set to 'STRING'), and an 'Output' checkbox (which is checked). The 'OK' button at the bottom right of the dialog is highlighted with a red box.

1. ENTER 'ApproveReject' under Name
2. CHECK Output
3. CLICK OK

The screenshot shows the ION platform interface for workflow management. The left sidebar contains navigation links for Home, Document Management, API Gateway, ION (selected), Mongoose, and Health Service. Under the Monitors & Workflows section, the 'Workflows' link is selected. The main workspace is titled 'Workflow D1S11RF_05' and displays the following details:

- Name:** D1S11RF_05
- Description:** D1S11RF_05's workflow template.
- Status:** Inactive
- Version 1:**
 - Last Updated by: SUNConf Admin
 - Last Updated on: Jan 25, 2025, 4:29:48 PM
 - Last Activated on: (no activation history)
- Show Workflow Properties**
- Notifications:** 1 (red circle) and 1 (orange circle).
- Workflow Properties:** Parameters tab is active, showing a table with one parameter:

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

1. CLICK the ‘+’ button under Parameters

The screenshot shows the Infor ION platform interface. The top navigation bar includes SyteLine, OS, ION, Mongoose, and Health Service. The left sidebar lists various monitoring and workflow management options. The main workspace is titled "Workflow D1S11RF_05" and displays a basic workflow diagram with a start node and an end node connected by a line. A modal dialog box is open in the center, titled "Add Workflow Parameter". Inside the dialog, the "Name" field is populated with "CustNum", the "Type" is set to "STRING", and the "Input" checkbox is checked. The "OK" button at the bottom right of the dialog is highlighted with a red box and labeled "3".

1. ENTER 'CustNum' under Name
2. CHECK Input
3. CLICK OK

The screenshot shows the ION platform interface for workflow management. On the left, a sidebar lists various monitoring and workflow-related modules. The main area is titled "Workflow D1S11RF_05" and displays a basic linear workflow diagram from "Start" to "End". A central modal window is open, titled "Add Workflow Parameter". Inside the modal, there is a form with fields for "Name" (containing "Name") and "Type" (set to "STRING"). Below these fields are checkboxes for "Input" (which is checked) and "Output". There is also a "Use Initial Value if Null" checkbox. At the bottom of the modal are "CANCEL" and "OK" buttons, with the "OK" button highlighted by a red box and the number "3".

1. ENTER 'Name' under Name
2. CHECK Input
3. CLICK OK

Workflow D1S11RF_05

Name: D1S11RF_05

Description: D1S11RF_05's workflow template.

Version 1

Last Updated by: SUNConf Admin

Last Updated on: Jan 25, 2025, 4:29:48 PM

Last Activated on:

Show Workflow Properties

Notifications: 1 + 3

1 +

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

D1S11RF_05
The workflow must not be empty.
ApproveReject
Parameter is unused in the workflow.
CustNum
Parameter is unused in the workflow.
Name
Parameter is unused in the workflow.

1. CLICK the '+' button under Parameters

The screenshot shows the ION platform interface for workflow management. On the left, a sidebar lists various monitoring and workflow-related modules. The main area is titled "Workflow D1S11RF_05" and displays its basic properties: Name (D1S11RF_05) and Description (D1S11RF_05's workflow template). A central toolbar provides icons for creating different workflow elements like Task, Task Chain, Notification, etc. A modal window titled "Add Workflow Parameter" is open, prompting for parameter details. The "Name" field is highlighted with a red box and contains the value "1 NewCreditLimit". The "Type" dropdown is set to "STRING". Below these, two checkboxes are checked: "Input" and "Output", also highlighted with a red box. At the bottom right of the modal, the "OK" button is highlighted with a red box and has a red number "3" above it. The overall interface is clean with a modern design.

1. ENTER 'NewCreditLimit' under Name
2. CHECK Input and Output
3. CLICK OK

Workflow D1S11RF_05

Workflow Properties

Parameters

Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
ApproveReject	STRING			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CustNum	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Name	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
NewCreditLimit	STRING			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

1. CLICK the ‘+’ button under Parameters



The screenshot shows the ION platform interface for workflow management. On the left, there's a navigation sidebar with various menu items like Home, Document Management, API Gateway, ION (which is selected), Mongoose, and Health Service. Under the Monitors & Workflows section, the 'Workflows' item is selected. In the main workspace, a workflow named 'Workflow D1S11RF_05' is displayed. A modal window titled 'Add Workflow Parameter' is open. Inside the modal, the 'Name' field is populated with 'OldCreditLimit' (marked with a red box labeled 1). Below it, two checkboxes are checked: 'Input' (marked with a red box labeled 2) and 'Output'. At the bottom right of the modal, there's a large red box labeled 3 containing the 'OK' button.

1. ENTER 'OldCreditLimit' under Name
2. CHECK Input and Output
3. CLICK OK

SyteLine OS ION Mongoose Health Service

Workflow D1S11RF_05

Name: D1S11RF_05

Description: D1S11RF_05's workflow template.

Inactive

Version 1

Last Updated by: SUNConf Admin

Last Updated on: Jan 25, 2025, 4:29:48 PM

Last Activated on:

Show Workflow Properties

Notifications: 1 + 5

1 +

	Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
<input type="checkbox"/>	ApproveReject	STRING			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	CustNum	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Name	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	NewCreditLimit	STRING			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	OldCreditLimit	STRING			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Start —> End

Workflow Properties: Parameters, Drill Backs, Structures, Authorizations, Service Account

1. CLICK the '+' button under Parameters

The screenshot shows the ION platform interface for workflow management. On the left, there's a navigation sidebar with various monitoring and workflow-related options. The main area is titled "Workflow D1S11RF_05". A central dialog box is open, titled "Add Workflow Parameter". Inside the dialog, the "Name" field is populated with "RowPointer" (marked with a red box labeled 1). The "Type" dropdown is set to "STRING". Below these, two checkboxes are checked: "Input" (marked with a red box labeled 2) and "Output". At the bottom right of the dialog is a large red box labeled 3, containing the "OK" button.

1. ENTER 'RowPointer' under Name
2. CHECK Input and Output
3. CLICK OK

SyteLine OS ION Mongoose Health Service

Workflow D1S11RF_05

Name * D1S11RF_05

Description D1S11RF_05's workflow template.

Inactive

Version 1

Last Updated by SUNConf Admin

Last Updated on Jan 25, 2025, 4:29:48 PM

Last Activated on

Show Workflow Properties

Notifications 1 6

Show Less

D1S11RF_05 The workflow must not be empty.

ApproveReject Parameter is unused in the workflow.

CustNum Parameter is unused in the workflow.

Name Parameter is unused in the workflow.

NewCreditLimit Parameter is unused in the workflow.

OldCreditLimit Parameter is unused in the workflow.

RowPointer Parameter is unused in the workflow.

Workflow Properties 1

Parameters Drill Backs Structures Authorizations Service Account

	Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
<input type="checkbox"/>	ApproveReject	STRING			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	CustNum	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Name	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	NewCreditLimit	STRING			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	OldCreditLimit	STRING			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	RowPointer	STRING			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

```

graph LR
    Start((Start)) --- End((End))
  
```

1. CLICK Drill Backs



The screenshot shows the ION platform interface for managing workflows. The top navigation bar includes SyteLine, OS, and a user icon. The main menu on the left lists Home, Document Management, API Gateway, ION (selected), Mongoose, and Health Service. Under the ION menu, Monitors & Workflows is expanded, showing sub-options like Monitors, Alarm Templates, Workflows, Activation Policies, Workflow Schedules, Active Monitors, Active Alarm Templates, Active Workflows, Active Activation Policies, Active Workflow Schedules, Activities, Alarms, Archive, Scripting, OneView, Data Catalog, Configuration, Configuration Management, Authorizations, and About ION.

The central workspace displays the "Workflow D1S11RF_05" configuration page. The title bar shows the workflow name. Below it, there are fields for Name (D1S11RF_05) and Description (D1S11RF_05's workflow template). A status indicator shows the workflow is Inactive. The "Workflow Properties" section includes tabs for Parameters, Drill Backs, Structures, Authorizations, and Service Account. The "Parameters" tab is active, showing a table with one row and a red box highlighting the "1+" button to add a new parameter. The table columns are Name, Application, and View. A message indicates "No data to display." On the left side of the Parameters table, there is a list of notifications:

- D1S11RF_05 (1)
- The workflow must not be empty.
- ApproveReject
- Parameter is unused in the workflow.
- CustNum
- Parameter is unused in the workflow.
- Name
- Parameter is unused in the workflow.
- NewCreditLimit
- Parameter is unused in the workflow.
- OldCreditLimit
- Parameter is unused in the workflow.
- RowPointer
- Parameter is unused in the workflow.

1. CLICK the '+' button under Parameters



The screenshot shows the SyteLine ION interface with the 'ION' tab selected. On the left, the navigation menu includes 'Home', 'Document Management', 'API Gateway', 'ION' (selected), 'Mongoose', and 'Health Service'. Under 'Monitors & Workflows', 'Workflows' is selected. The main area displays 'Workflow D1S11RF_05' with a 'Name' field containing 'D1S11RF_05' and a 'Description' field containing 'D1S11RF_05's workflow template.' A modal window titled 'Add Drill Back' is open, containing the following fields:

- Name ***: CustomerDrillBack (highlighted by a red box with number 1)
- Application ***: infor.syteline (infor.syteline) (highlighted by a red box with number 2)
- View ***: CustomerView (highlighted by a red box with number 3)
- Parameter** section:

Name	Value
LogicalId *	lid://infor.syteline.csi (highlighted by a red box with number 4)
AccountingEntity	
Location	

1. ENTER 'CustomerDrillBack' under Name
2. SELECT *infor.syteline (infor.syteline)* from the dropdown
3. SELECT *CustomerView* from the dropdown
4. ENTER 'lid://infor.syteline.csi' for LogicalID Value
5. DRAG bar to the bottom of the list

The screenshot shows the SyteLine ION interface with the 'ION' tab selected. On the left, the navigation menu includes 'Monitors & Workflows' under 'Workflows'. The main area displays the 'Workflow D1S11RF_05' configuration. A modal dialog box titled 'Add Drill Back' is open, prompting for a name ('CustomerDrillBack'), application ('infor.sytleine (infor.sytleine)'), and view ('CustomerView'). Below these, a table lists parameters: 'AccountingEntity', 'Location', and 'ID1'. The 'ID1' row has a radio button selected (highlighted with a red box labeled '1') and a dropdown menu open, showing 'CustNum' as the selected option. A red box surrounds the 'OK' button (highlighted with a red box labeled '2'). The background shows the workflow configuration details, including its name ('D1S11RF_05'), description ('D1S11RF_05's workflow template.'), and version history.

1. ENABLE ID1 Parameter radio button and SELECT 'CustNum' from dropdown
2. CLICK OK

The screenshot shows the ION interface for workflow management. On the left, a sidebar lists various monitoring and workflow-related sections. The main workspace is titled "Workflow D1S11RF_05". The toolbar at the top of the workspace contains several icons, with the "Task" icon being highlighted by a red box and a red arrow pointing to a timeline diagram below. The timeline diagram consists of two nodes: "Start" and "End" connected by a single line. The "Workflow Properties" section is visible, showing a table for parameters with one entry: "CustomerDrillBack" associated with "infor.sytleine (infor.sytleine)" and "CustomerView".

1

Task

Start End

	Name	Application	View
<input type="checkbox"/>	CustomerDrillBack	infor.sytleine (infor.sytleine)	CustomerView

1. CLICK and DRAG the Task icon on to the timeline



The screenshot shows the ION platform interface for workflow management. A workflow named "D1S11RF_05" is displayed, featuring a single task node labeled "Credit Approval". The "Task Properties" tab is open, showing the configuration for this task. The following fields are highlighted with red boxes and numbered:

- 1**: Task Name: Credit Approval
- 2**: Message: Customer - [Name] - Credit Limit has changed
- 3**: Priority: High
- 4**: Due Date: Time since task creation date (selected), with a value of 1 and a dropdown for days.
- 5**: Content (under Task Properties tab)

1. ENTER 'Credit Approval' under Name
2. COPY 'Customer - [Name] - Credit Limit has changed and is requesting approval.' and PASTE under Message (don't include quotes)
3. SELECT *High* from the Priority dropdown field
4. ENABLE radio button for Time since task creation date and ENTER '1'
5. CLICK Content under Task Properties

Workflow D1S11RF_05

Task Properties

Type	Name	Data Type
Parameter	ApproveReject	STRING
Parameter	CustName	STRING
<input checked="" type="checkbox"/> Drill Back	CustomerDrillBack	
<input checked="" type="checkbox"/> Parameter	Name	STRING
<input checked="" type="checkbox"/> Parameter	NewCreditLimit	STRING
<input checked="" type="checkbox"/> Parameter	OldCreditLimit	STRING
Parameter	RowPointer	STRING

1. **CHECK** the boxes for CustomerDrillBack, Name, NewCreditLimit, OldCreditLimit
2. **CLICK** the '→' to add the parameters to the table to be displayed

Workflow D1S11RF_05

Name: D1S11RF_05

Description: D1S11RF_05's workflow template.

Task Properties

Content (selected) **Actions** (highlighted with red box 2)

Type	Name	Data Type
Parameter	ApproveReject	STRING
Parameter	CustNum	STRING
Parameter	RowPointer	STRING

Type	Name	Label	Read Only
Parameter	Name	Name	<input checked="" type="checkbox"/>
Drill Back	CustomerDrillBack	Customer Drill Back	<input checked="" type="checkbox"/>
Parameter	NewCreditLimit	New Credit Limit	<input type="checkbox"/>
Parameter	OldCreditLimit	Old Credit Limit	<input checked="" type="checkbox"/>

1. **CHECK** Read-Only for Name, CustomerDrillBack and OldCreditLimit
2. **CLICK** Actions under Task Properties

The screenshot shows the ION platform interface for workflow configuration. On the left, a sidebar lists various monitoring and workflow management options. The main workspace is titled "Workflow D1S11RF_05" and displays a simple workflow diagram with a single task named "Credit Approval". The "Actions" tab is selected under "Task Properties", and a red box highlights the "Distribution" tab. Below this, a section for custom action buttons is shown, with a red box around the "Use custom action buttons to set parameter" radio button (labeled 1) and the "ApproveReject" dropdown (labeled 2). A red box also surrounds the "Button label" and "Value" columns where two entries have been added: "Approve" with value "Approved" (labeled 4) and "Reject" with value "Rejected" (labeled 6). A red box labeled 3,5 is placed over the "+" button used for adding new rows. A red box labeled 7 is placed over the "Distribution" tab itself.

1. **ENABLE** “Use custom action buttons to set parameter” radio button
2. **SELECT** ApproveReject from dropdown
3. **CLICK** ‘+’ to add a button label
4. **ENTER** ‘Approve’ under Button Label and ‘Approved’ for Value
5. **CLICK** ‘+’ to add a button label
6. **ENTER** ‘Reject’ under Button Label and ‘Rejected’ for Value

7. **CLICK** Distribution under Task Properties

The screenshot shows the ION Workflow editor interface. On the left, a navigation sidebar lists various monitoring and workflow management options. The main workspace is titled "Workflow D1S11RF_05" and displays a simple workflow diagram with a single task node labeled "Credit Approval". The workflow starts at a "Start" event, goes to the task, and ends at an "End" event. Below the diagram, the "Task Properties" tab is selected, showing the "Distribution" tab. Under "Distribution List", there is one entry: "Credit Approval". The "Distribution Type" section contains two radio buttons: "Simple" (selected) and "Advanced". A red box highlights the "1 +" button, which is used to add more distribution entries. The status bar at the bottom right indicates "No data to display".

1. CLICK ‘+’ to add a distribution list

The screenshot shows the ION platform interface for managing workflows. On the left, there's a navigation sidebar with various monitoring and workflow-related options. The main area is titled "Workflow D1S11RF_05". A central dialog box is open, titled "Select Distribution Data".
1. The "Type" dropdown menu is set to "User", highlighted with a red box.
2. The search input field contains the text "D1S11RF_05", and the "SEARCH" button is highlighted with a red box.
3. The checkbox labeled "Send e-mail to the selected user" is unchecked, highlighted with a red box.
4. The "OK" button at the bottom right of the dialog is highlighted with a red box.

1. **SELECT** User under Type dropdown
2. **ENTER** your username under Search then **CLICK** search to find your user
3. **UNCHECK** Send e-mail to the selected user
4. **CLICK** OK

Workflow D1S11RF_05

Name * D1S11RF_05

Description D1S11RF_05's workflow template.

Version 1

Last Updated by SUNConf Admin

Last Updated on Jan 25, 2025, 4:29:48 PM

Last Activated on

Show Workflow Properties

Notifications 0 0

Task Task Chain Notification Set Parameter Decision Table API Wait Start Workflow Script Decision Parallel LoopBack Subprocess

Credit Approval

Start End

Task Properties

Distribution List Distribution Type

Simple Create a single task

Advanced Create a parallel task for each user in distribution

Type Detail Send E-mail

USER D1S11RF_05

1. CLICK and DRAG the Notification icon on to the timeline

Workflow D1S11RF_05

Name *: D1S11RF_05

Description: D1S11RF_05's workflow template.

Version 1

Last Updated by: SUNConf Admin

Last Updated on: Jan 25, 2025, 4:29:48 PM

Last Activated on:

Show Workflow Properties

Notifications: 4

Notification Properties

Content

1 **Name ***: Update Alert

2 **Message**: Customer - [Name] - Newly requested Credit Limit of [NewCreditLimit] has been [ApproveReject]. Show notes from previous steps

3 **Expires after**: 1 days

4 **Content**

1. ENTER 'Update Alert' under Name
2. COPY 'Customer - [Name] - Newly requested Credit Limit of [NewCreditLimit] has been [ApproveReject].'
PASTE under Message (don't include quotes)
CHECK Show notes from previous steps
3. CHECK Expires after 1 day
4. CHECK Content under Notification Properties

Workflow D1S11RF_05

Name: D1S11RF_05

Description: D1S11RF_05's workflow template.

Version 2

Last Updated by: D1S11RF_05

Last Updated on: Jan 27, 2025, 11:37:47 AM

Last Activated on:

Show Workflow Properties

Notifications: 4 (Red) 1 (Yellow)

1

Type	Name	Data Type
Parameter	ApproveReject	STRING
Parameter	CustNum	STRING
Drill Back	CustomerDrillBack	
Parameter	Name	STRING
Parameter	NewCreditLimit	STRING
Parameter	OldCreditLimit	STRING
Parameter	RowPointer	STRING

2

No data to display.

1. **CHECK** the boxes for ApproveReject, CustomerDrillBack, Name, NewCreditLimit, OldCreditLimit
2. **CLICK** the '->' to add the parameters to the table to be displayed

SyteLine OS | ION | Mongoose | Health Service

Workflow D1S11RF_05

Name * D1S11RF_05

Description D1S11RF_05's workflow template.

Inactive

Version 1

Last Updated by SUNConf Admin

Last Updated on Jan 25, 2025, 4:29:48 PM

Last Activated on

Show Workflow Properties

Notifications 1 0

Show Less

Update Alert
Notification must have a distribution.

Task Task Chain Notification Set Parameter Decision Table API Wait Start Workflow Script Decision Parallel LoopBack Subprocess

```

graph LR
    Start((Start)) --> CreditApproval[Credit Approval]
    CreditApproval --> UpdateAlert[Update Alert]
    UpdateAlert --> End((End))
  
```

Notification Properties

Content Distribution

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

	Type	Name	Data Type
<input type="checkbox"/>	Parameter	CustNum	STRING
<input type="checkbox"/>	Parameter	RowPointer	STRING

	Type	Name	Label	Read-Only
<input type="checkbox"/>	Parameter	ApproveReject	Approve Reject	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Parameter	Name	Name	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Drill Back	CustomerDrillBack	Customer Drill Back	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Parameter	NewCreditLimit	New Credit Limit	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Parameter	OldCreditLimit	Old Credit Limit	<input checked="" type="checkbox"/>

1. CLICK Distribution under Notification Properties

SyteLine OS ION Mongoose Health Service

Workflow D1S11RF_05

Name * D1S11RF_05

Description D1S11RF_05's workflow template.

Inactive

Version 1

Last Updated by SUNConf Admin

Last Updated on Jan 25, 2025, 4:29:48 PM

Last Activated on

Show Workflow Properties

Notifications 1 + 0

1 +

Notification Properties

Distribution List

Simple

Advanced

No data to display.

```
graph LR; Start((Start)) --> CreditApproval[Credit Approval]; CreditApproval --> UpdateAlert[Update Alert]; UpdateAlert --> End((End))
```

1. CLICK '+' to add a distribution list

The screenshot shows the Infor ION interface with the 'ION' tab selected. On the left, the navigation menu includes 'Home', 'Document Management', 'API Gateway', 'ION' (selected), 'Mongoose', and 'Health Service'. Under 'Monitors & Workflows', 'Workflows' is selected, showing 'D1S11RF_05' as the active workflow template. The main workspace displays the 'Workflow D1S11RF_05' configuration with various tabs like 'Task', 'Task Chain', etc. A modal dialog titled 'Select Distribution Data' is open, overlaid on the workflow configuration. The dialog has the following steps:

- 1.** SELECT User under Type dropdown
- 2.** ENTER your username under Search then CLICK search to find your user
- 3.** UNCHECK Send e-mail to the selected user
- 4.** CLICK OK

- 1.** **SELECT** User under Type dropdown
- 2.** **ENTER** your username under Search then **CLICK** search to find your user
- 3.** **UNCHECK** Send e-mail to the selected user
- 4.** **CLICK** OK

Workflow D1S11RF_05

Name: **D1S11RF_05**

Description: D1S11RF_05's workflow template.

Version 1

Last Updated by: SUNConf Admin

Last Updated on: Jan 25, 2025, 4:29:48 PM

Last Activated on:

Show Workflow Properties

Notifications: 0 0

Notification Properties

Distribution

Distribution List

Simple

Advanced

	Type	Detail	Send E-mail
<input type="checkbox"/>	USER	D1S11RF_05	<input type="checkbox"/>

1. CLICK the Save icon on the menu bar

The screenshot shows the Infor SyteLine ION interface. The top navigation bar includes 'SyteLine', 'OS', and various system status icons. The main menu on the left lists categories like Home, Document Management, API Gateway, ION (which is selected), Mongoose, and Health Service. Under the 'Monitors & Workflows' section, 'Workflows' is selected, showing a list of items such as 'D1S11RF_05'. The central workspace displays the 'Workflow D1S11RF_05' configuration. The workflow diagram shows a sequence from 'Start' to 'Credit Approval' (Task) to 'Update Alert' (Notification) to 'End'. The 'Notification Properties' section is expanded, showing settings for 'Update Alert' notifications. A red box highlights the 'Activate' icon (a power button symbol) in the top toolbar.

1. CLICK the Activate icon from the menu bar



Review

1

Workflow D1S11RF_05

Name **D1S11RF_05**

Description
D1S11RF_05's workflow template.

Active

Version 1

Last Updated by
D1S11RF_05

Last Updated on
Jan 25, 2025, 5:19:15 PM

Last Activated on
Jan 25, 2025, 5:19:30 PM

Show Workflow Properties

Notifications 0 0

Show Less

Workflow Properties

	Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
<input type="checkbox"/>	ApproveReject	STRING			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	CustNum	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Name	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	MaxCreditLimit	STRING			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

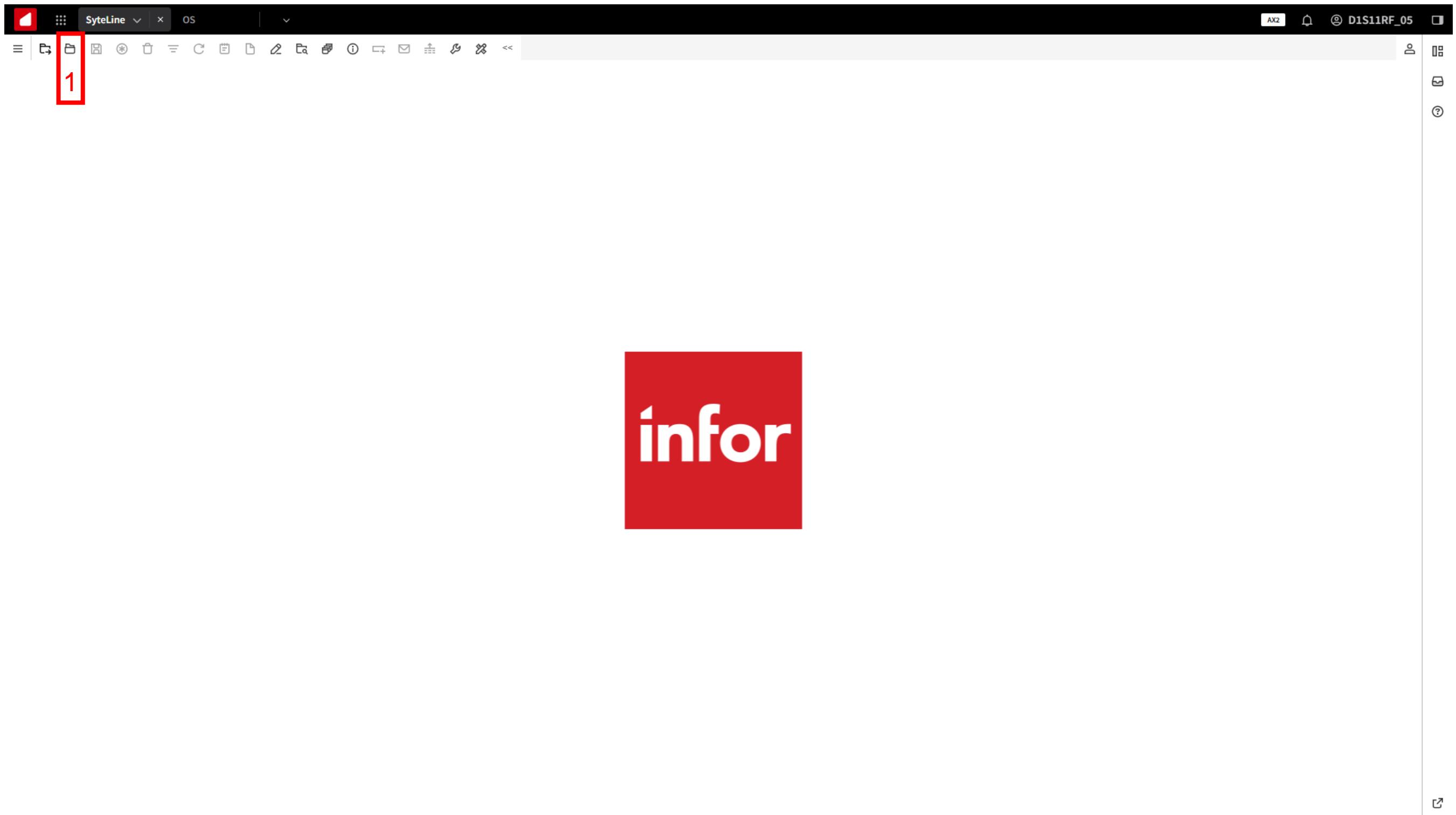
1. CLICK SyteLine on the black bar





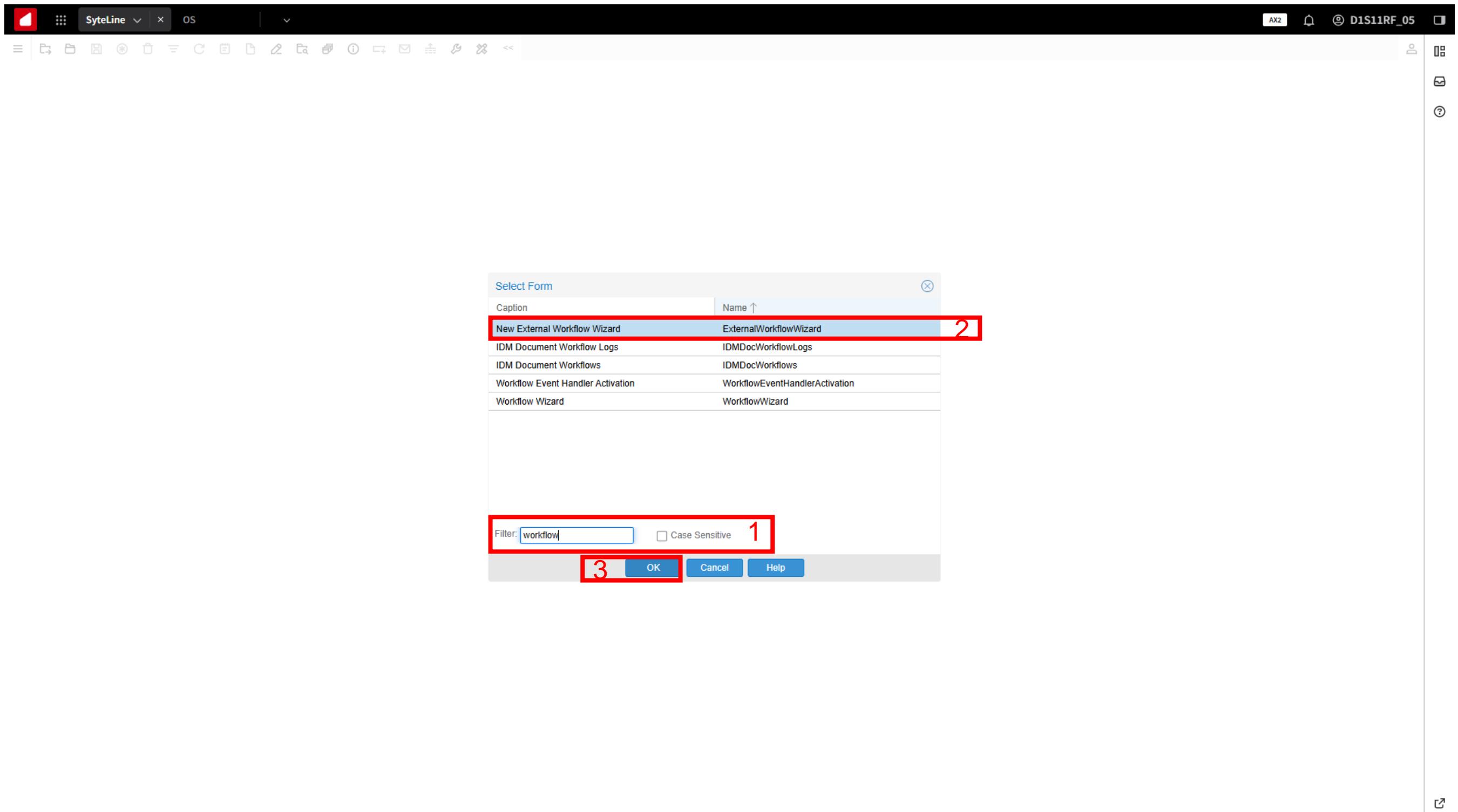
1. CLICK the Explorer icon to hide the Explorer menu





1. CLICK the Open folder





1. ENTER 'workflow' in Filter
2. SELECT *New External Workflow Wizard* from the list
3. CLICK OK

The screenshot shows the 'New External Workflow Wizard' interface. In the 'Type of Workflow' section, the 'Generate Workflow Approval Request' radio button is selected (indicated by a blue dot) and highlighted with a red box, labeled with a red '1'. Below it are other options: 'Generate Workflow Alert' (radio button) and 'Generate Pulse Alert' (radio button). At the bottom of the screen, there are several buttons: 'Help' (blue), a checkbox for 'Customize Resulting Workflow' (unchecked), a checked checkbox for 'Use SSO', and three main action buttons: '< Back' (light blue), 'Next >' (blue with white text, highlighted with a red box, labeled with a red '2'), and 'Cancel' (light blue).

1. ENABLE “Generate Workflow Approval Request” radio button
2. CLICK the Next button



SyteLine OS

New External Workflow Wizard

Type of Workflow: Generate Workflow Approval Request

Description: Credit Limit Workflow **1**

Apply To:

All Forms **2** Form: Customers Customers
IDO: SLCustomers Customers

What to track:

Additions Changes Deletions

Help Customize Resulting Workflow

< Back Next > **3** Cancel

52

1. ENTER 'Credit Limit Workflow' as the Description
2. ENTER 'Customers' in the Form field and press TAB to populate the IDO with SLCustomers
3. CLICK the Next button

SyteLine OS

New External Workflow Wizard

Type of Workflow: Generate Workflow Approval Request

Description: Credit Limit Workflow

Filter:

All Rows **1**

Where Customers = Value

Customers Adjusted by: None %

Adjusted: None By: Days

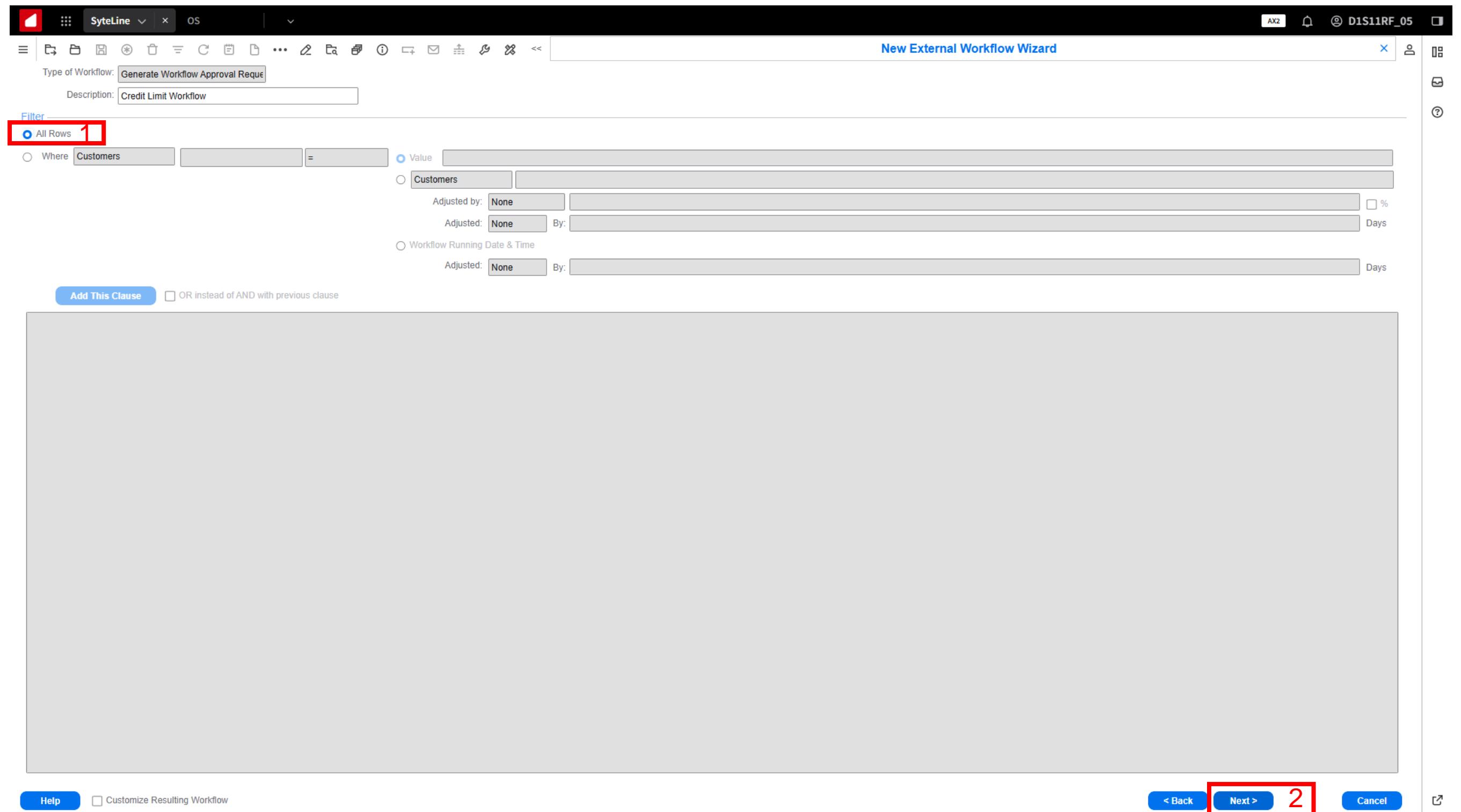
Workflow Running Date & Time Adjusted: None By: Days

Add This Clause OR instead of AND with previous clause

2

Help Customize Resulting Workflow

< Back Next > **2** Cancel



1. **ENABLE** All Rows radio button
2. **CLICK** the Next button



SyteLine OS

New External Workflow Wizard

Type of Workflow: Generate Workflow Approval Request

Description: Credit Limit Workflow

Condition

① All Changes

② Where Customers CreditLimit Changes 1

Value: %

Customers:

Adjusted by: None %

Adjusted: None By: Days

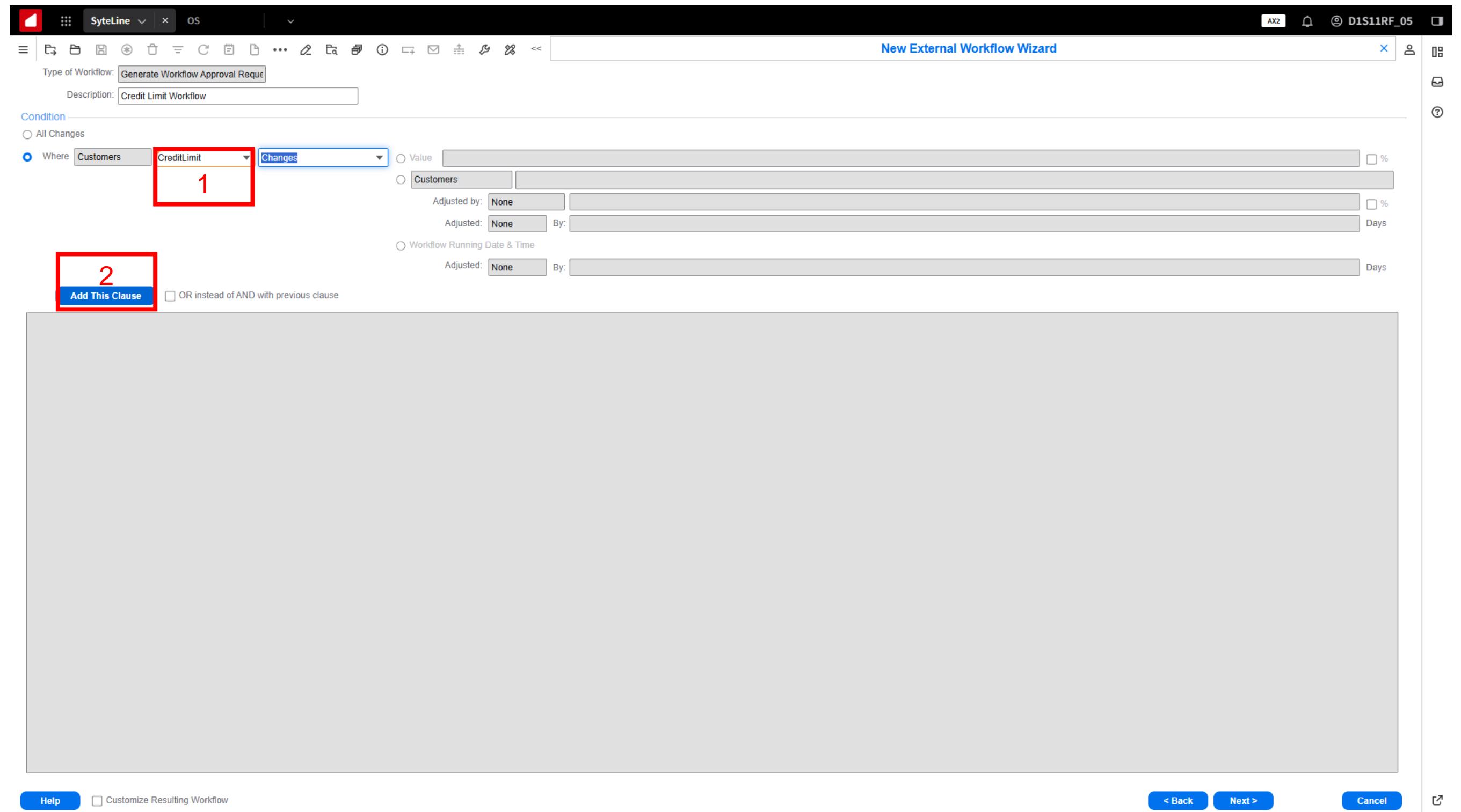
Workflow Running Date & Time: Adjusted: None By: Days

Add This Clause

OR instead of AND with previous clause

Help Customize Resulting Workflow

< Back Next > Cancel



1. ENTER 'CreditLimit' in the where condition and press TAB
2. SELECT Add This Clause 'ION' in the search bar



SyteLine OS

New External Workflow Wizard

Type of Workflow: Generate Workflow Approval Request

Description: Credit Limit Workflow

Condition

All Changes

Where Customers CreditLimit Changes

Value [] %

Customers []

Adjusted by: None [] %

Adjusted: None By: [] Days

Workflow Running Date & Time

Adjusted: None By: [] Days

Add This Clause OR instead of AND with previous clause

Credit Limit Changes

Help Customize Resulting Workflow

< Back Next > 1 Cancel

A red box highlights the 'Next >' button.

1. CLICK the Next button



SyteLine OS

New External Workflow Wizard

Type of Workflow: Generate Workflow Approval Request

Description: Generate Workflow Approval Request

BOD Mapping

Workflow: Select an External Workflow... 1

Recipient: Pulse Alert Recipient...

	Outbound Value	Inbound Value	Use New Va...
CREDIT_LIMIT_WORKFLOW_CSI			
D1S11RF_00			
D1S11RF_01			
D1S11RF_02			
D1S11RF_03			
D1S11RF_04			
D1S11RF_05 2			
D1S11RF_06			
D1S11RF_07			
D1S11RF_08			
D1S11RF_09			
D1S11RF_10			

Help Customize Resulting Workflow

< Back Next > Cancel

56

1. CLICK the dropdown arrow next to Workflow
2. SELECT your username for the workflow you created (ex D1S11RD_05)



SyteLine OS

Type of Workflow: Generate Workflow Approval Request
Description: Credit Limit Workflow

BOD Mapping

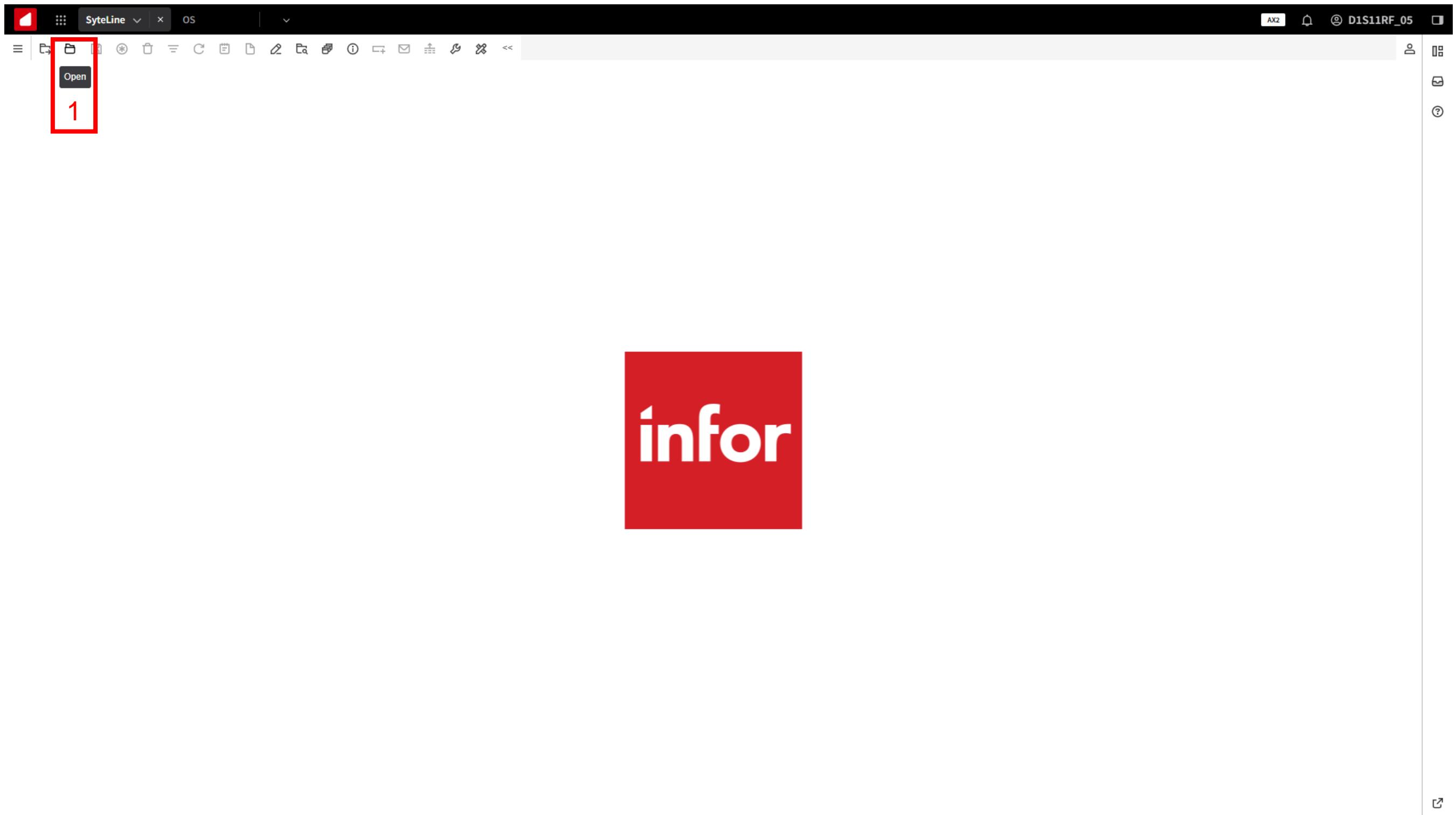
Workflow: D1S11RF_05 Recipient: Pulse Alert Recipient...

	Workflow ID	BOD Field	Outbound Value	Inbound Value	Use New Va...
1	Generate Workflow Ap...	RowPointer	RowPointer	RowPointer	<input type="checkbox"/>
2	Generate Workflow Ap...	ApproveReject		ApproveReject	<input type="checkbox"/>
3	Generate Workflow Ap...	OldCreditLimit	CreditLimit	CreditLimit	<input type="checkbox"/>
4	Generate Workflow Ap...	Name	Name		<input type="checkbox"/>
5	Generate Workflow Ap...	CustNum	CustNum		<input type="checkbox"/>
6	Generate Workflow Ap...	NewCreditLimit	CreditLimit	CreditLimit	<input checked="" type="checkbox"/> 1

Help Customize Resulting Workflow < Back Next > Cancel 2

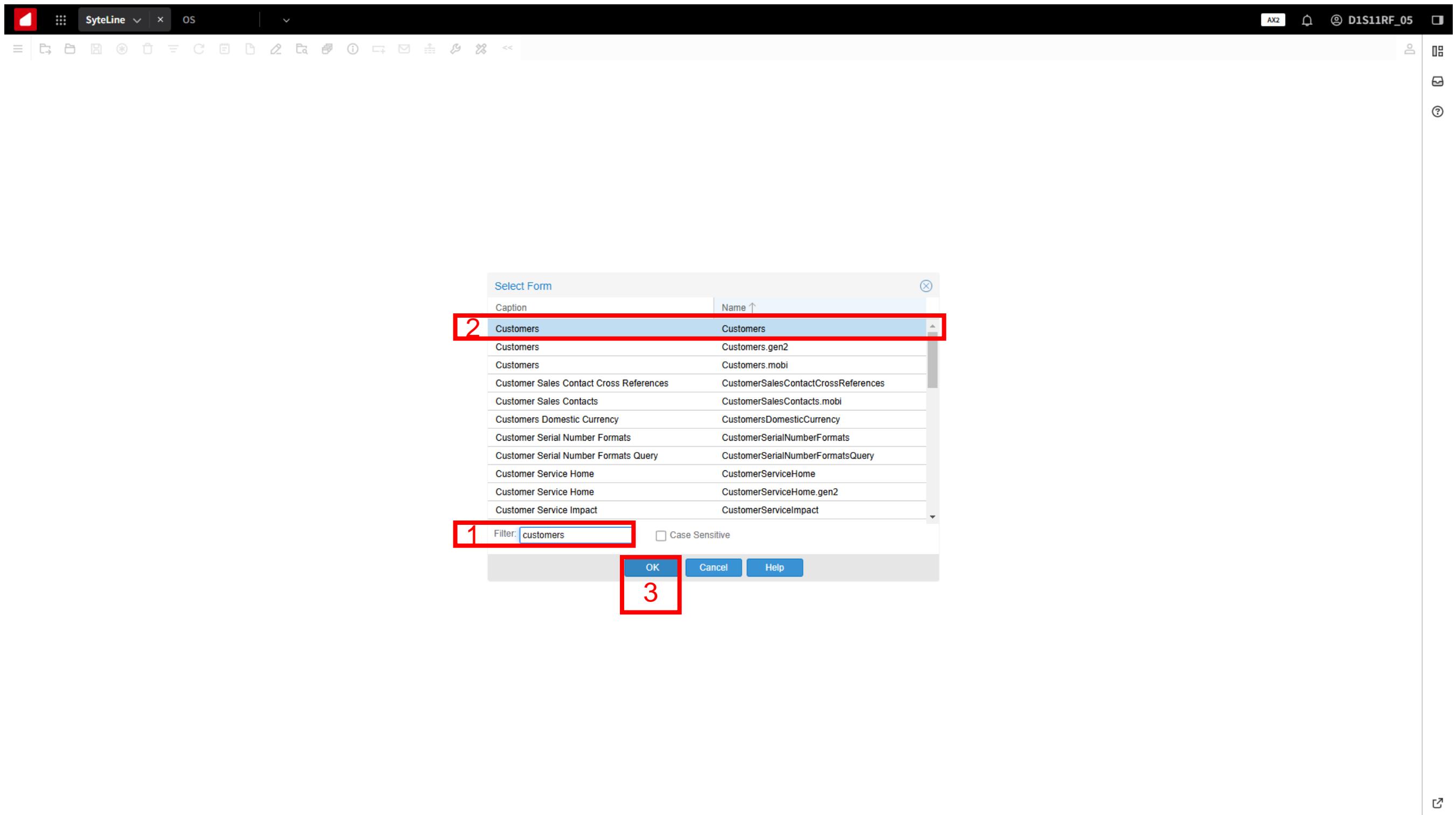
1. ENTER 'CreditLimit' for Outbound Value, press Tab and ENTER 'CreditLimit' for Inbound Values for OldCreditLimit BOD Field
ENTER 'Name' and press Tab for Outbound Value for Name BOD Field
SELECT CustNum from dropdown menu for Outbound for CustNum BOD Field
ENTER 'CreditLimit' for Outbound Value, press Tab and
ENTER 'CreditLimit' for Inbound Values for NewCreditLimit BOD Field and CHECK Use New Value
2. CLICK the Cancel button

Review

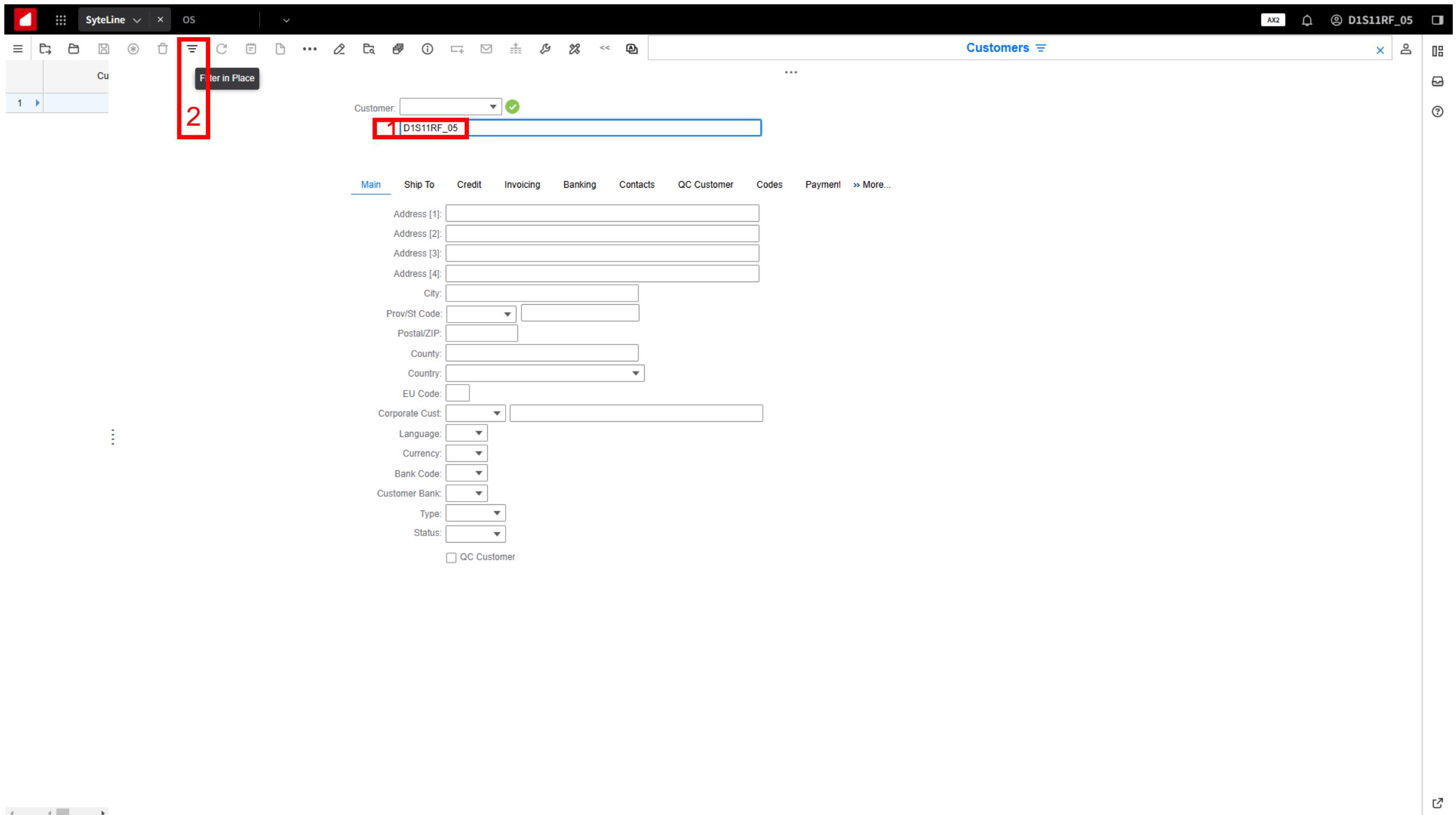


1. CLICK the Open folder





1. ENTER 'customers' in Filter
2. SELECT *Customers* from the list
3. CLICK OK



Customer: 

Main Ship To Credit Invoicing Banking Contacts QC Customer Codes Payment > More...

Address [1]:
Address [2]:
Address [3]:
Address [4]:
City:
Prov/St Code:
Postal/ZIP:
County:
Country:
EU Code:
Corporate Cust:
Language:
Currency:
Bank Code:
Customer Bank:
Type:
Status:
 QC Customer

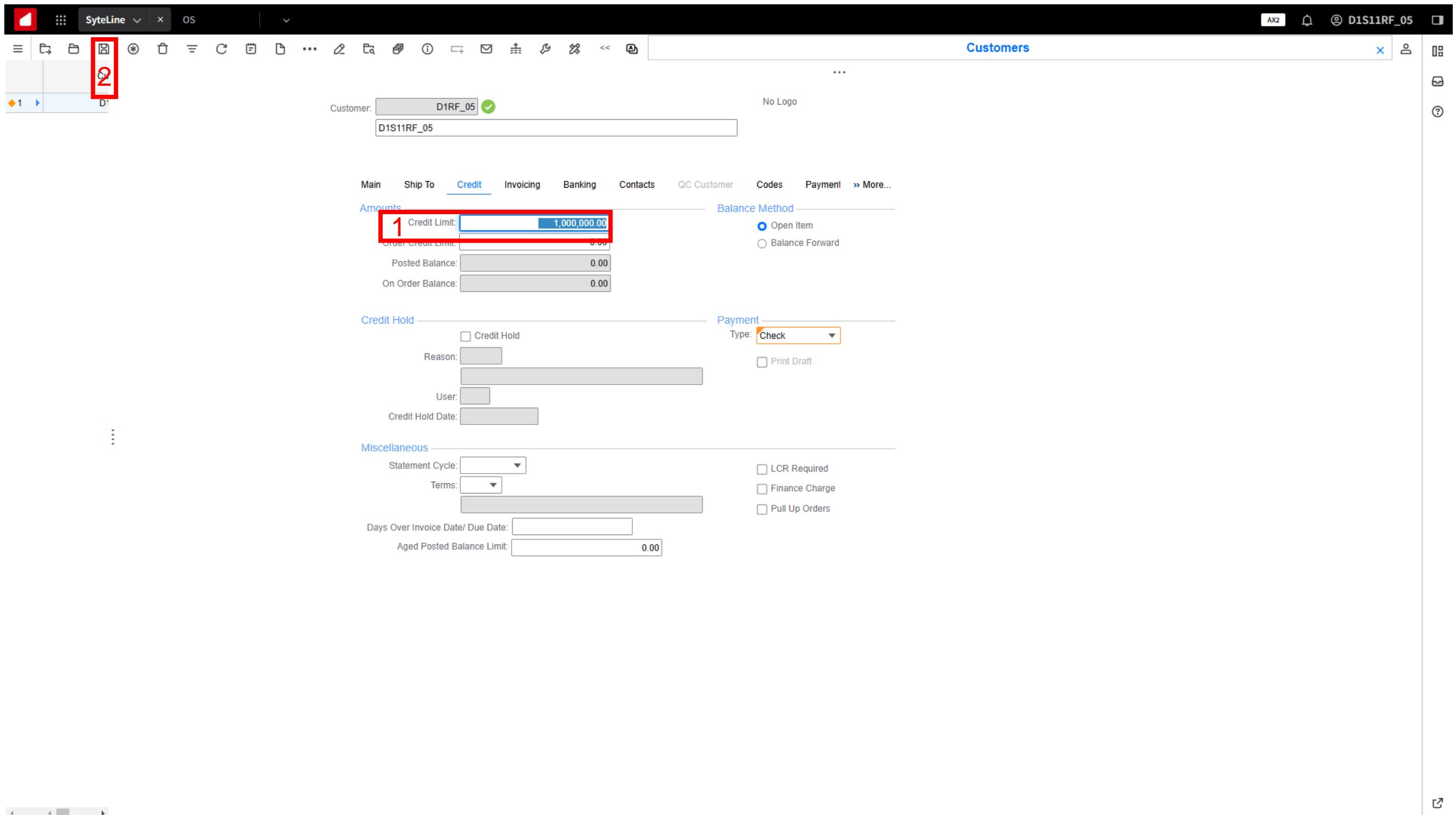
1. ENTER your username in the Description field
2. CLICK Filter in Place



The screenshot shows the SyteLine software interface with the title "Customers". The top navigation bar includes icons for file operations like Open, Save, Print, and a search function. The main area displays customer information for "D1RF_05". A red box highlights the "Credit" tab in the navigation bar. The "Customer" field is set to "D1RF_05". The "Bank Code" dropdown is set to "BK1". Other tabs visible include Main, Ship To, Invoicing, Banking, Contacts, QC Customer, Codes, Payment, and More... Below the tabs are various input fields for address, city, state/province, postal code, county, country, EU code, corporate customer, language, currency (set to USD), bank code (set to BK1), customer bank, type, and status. A checkbox for "QC Customer" is also present.

1. CLICK Credit to switch to Credit screen





The screenshot shows the SyteLine software interface for managing customers. The main window title is "Customers". The toolbar at the top includes standard file operations like New, Open, Save, Print, and Exit, along with a search icon and a user icon. A red box labeled '2' highlights the "Save" button in the toolbar. The customer record for "D1S11RF_05" is displayed, with the "Customer:" field set to "D1RF_05". The "Main" tab is selected. In the "Credit" tab, the "Amounts" section shows the "Credit Limit" as "1,000,000.00" (highlighted by a red box labeled '1'). Other fields in this section include "Order Credit Limit" (0.00), "Posted Balance" (0.00), and "On Order Balance" (0.00). The "Balance Method" section contains radio buttons for "Open Item" (selected) and "Balance Forward". The "Credit Hold" section includes fields for "Credit Hold" (checkbox), "Reason" (text input), "User" (text input), and "Credit Hold Date" (date input). The "Payment" section shows "Type: Check" and a "Print Draft" checkbox. The "Miscellaneous" section includes dropdowns for "Statement Cycle" and "Terms", and checkboxes for "LCR Required", "Finance Charge", and "Pull Up Orders". The "Days Over Invoice Date/ Due Date" and "Aged Posted Balance Limit" fields are also present.

1. ENTER '1000000' for the new credit limit and press Tab
2. CLICK the Save button

Customer: D1RF_05

No Logo

D1S11RF_05

Main Ship To Credit Invoicing Banking Contacts QC Customer Codes Payment > More...

Amounts

Credit Limit: 0.00
Order Credit Limit: 0.00
Posted Balance: 0.00
On Order Balance: 0.00

Balance Method

Open Item
 Balance Forward

Credit Hold

Credit Hold
Reason:
User:
Credit Hold Date:

Payment

Type: Check
 Print Draft

Miscellaneous

LCR Required
 Finance Charge
 Pull Up Orders

Statement Cycle:
Terms:
Days Over Invoice Date/ Due Date:
Aged Posted Balance Limit: 0.00

1. CLICK the Inbox in the Smart Panel

The screenshot shows the SyteLine software interface. On the left, a customer record for 'D1S11RF_05' is displayed under the 'Credit' tab. The 'Amounts' section shows Credit Limit, Order Credit Limit, Posted Balance, and On Order Balance all at 0.00. The 'Balance Method' section has 'Open Item' selected. In the 'Credit Hold' section, there is a checkbox for 'Credit Hold' which is unchecked. The 'Payment' section shows 'Type: Check'. The 'Miscellaneous' section includes fields for Statement Cycle, Terms, Days Over Invoice Date/Due Date, and Aged Posted Balance Limit (set to 0.00). On the right, the 'Inbox' window is open, showing one message from 'D1S11RF_05' with the subject 'Customer - D1S11RF_05 - Credit Limit has chan...', dated 'TODAY AT 5:38:40 PM', and a priority level of 'HIGH PRIORITY'. A red box highlights this message, and a red number '1' is placed to its left. The bottom right corner of the inbox window shows '1 Total'.

1. CLICK on the new message in your inbox



The screenshot shows the SyteLine application interface. On the left, the 'Customers' screen is displayed for Customer D1S11RF_05. The 'Credit' tab is selected. The 'Amounts' section shows Credit Limit, Order Credit Limit, Posted Balance, and On Order Balance all at 0.00. The 'Balance Method' section has 'Open Item' selected. The 'Credit Hold' section includes fields for Credit Hold (checkbox), Reason (text input), User (text input), and Credit Hold Date (text input). The 'Payment' section shows Type: Check and Print Draft checkbox. The 'Miscellaneous' section includes Statement Cycle, Terms, Days Over Invoice Date/Due Date, and Aged Posted Balance Limit at 0.00. On the right, an 'Inbox' window is open, showing a single task: 'Customer - D1S11RF_05 - Credit Limit has c...' with a priority of 'HIGH PRIORITY'. The 'Assign to me' button is highlighted with a red box. The bottom right of the inbox shows Task ID: 8 and Workflow ID: 126.

1. CLICK Assign to me button



The screenshot shows the SyteLine software interface. On the left, the 'Customers' screen is displayed with a customer record for 'D1S11RF_05'. The 'Credit' tab is selected. In the 'Amounts' section, the 'Credit Limit' field contains '0.00'. In the 'Balance Method' section, the 'Open Item' radio button is selected. In the 'Payment' section, the 'Type' dropdown is set to 'Check'. A red box highlights the 'New Credit Limit' field, which contains '2000000.00'. To the right, an 'Inbox' window is open, showing a task titled 'Customer - D1S11RF_05 - Credit Limit has c...'. The task details show the old credit limit as '0.00000000' and the new credit limit as '2000000.00'. The task is marked as 'HIGH PRIORITY' and has an 'Assign' button.

Customer: D1RF_05

Main Ship To Credit Invoicing Banking Contacts QC Customer Codes Payment > More...

Amounts

Credit Limit: 0.00

Order Credit Limit: 0.00

Posted Balance: 0.00

On Order Balance: 0.00

Balance Method

Open Item

Balance Forward

Credit Hold

Credit Hold

Reason:

User:

Credit Hold Date:

Payment

Type: Check

Print Draft

Miscellaneous

Statement Cycle:

Terms:

Days Over Invoice Date/ Due Date:

Aged Posted Balance Limit: 0.00

LCR Required

Finance Charge

Pull Up Orders

New Credit Limit

1 2000000.00

Old Credit Limit

0.00000000

Attachments

Workflow Progress

Notes (0)

Task ID: 8 Workflow ID: 126

1. CHANGE the value for the New Credit Limit field to \$2,000,000

The screenshot shows the SyteLine software interface for managing customers. The main window displays the 'Credit' tab for customer 'D1S11RF_05'. The 'Notes' section is highlighted with a red border and contains three numbered steps:

1. Notes (0)
2. Doubling the limit and approving! MM
3. Save Note

The 'Notes' section also includes a character count of 'Characters left 5084'.

Other visible sections include 'Amounts', 'Balance Method', 'Credit Hold', 'Payment', 'Miscellaneous', and 'Attachments'.

1. EXPAND Notes
2. ENTER a message in the Notes field
3. CLICK Save Note

The screenshot shows the SyteLine software interface. The main window displays the 'Credit' tab for customer 'D1S11RF_05'. The 'Amounts' section shows credit limits at 0.00. The 'Balance Method' section has 'Open Item' selected. Under 'Credit Hold', there is a checkbox for 'Credit Hold' which is unchecked. The 'Payment' section shows 'Check' as the type. In the 'Miscellaneous' section, 'Days Over Invoice Date/ Due Date:' is set to 0.00. On the right side, the 'Inbox' panel shows a task titled 'Customer - D1S11RF_05 - Credit Limit has c...' with a due date of 'TODAY AT 5:38:40 PM due TODAY AT 6:38:40 PM' and a priority of 'HIGH PRIORITY'. A large red box highlights the 'Approve' button. The bottom right of the inbox panel shows 'Task ID: 8 Workflow ID: 126'.

1. CLICK Approve



The screenshot shows the SyteLine software interface. The main window displays the 'Customers' screen for customer 'D1S11RF_05'. The 'Credit' tab is selected. On the right, an 'Inbox' panel shows one new message. A red box highlights the message, and a red number '1' is placed over it. The message subject is 'Customer - D1S11RF_05 - Newly requested Cre...'.

Customer: D1S11RF_05

Main **Ship To** **Credit** **Invoicing** **Banking** **Contacts** **QC Customer** **Codes** **Payment** > More...

Amounts

- Credit Limit: 0.00
- Order Credit Limit: 0.00
- Posted Balance: 0.00
- On Order Balance: 0.00

Balance Method

- Open Item
- Balance Forward

Credit Hold

- Credit Hold
- Reason: [redacted]
- User: [redacted]
- Credit Hold Date: [redacted]

Payment

- Type: Check
- Print Draft

Miscellaneous

- LCR Required
- Finance Charge
- Pull Up Orders

Days Over Invoice Date/ Due Date: [redacted]
Aged Posted Balance Limit: 0.00

Inbox

All

Search... **ID: 9**

Today

1 Customer - D1S11RF_05 - Newly requested Cre... TODAY AT 5:41:21 PM

1 Total

1. CLICK on the new message in your inbox

SyteLine OS

Customer: D1RF_05

Main Ship To Credit Invoicing Banking Contacts QC Customer Codes Payment > More...

Amounts

Credit Limit: 0.00
Order Credit Limit: 0.00
Posted Balance: 0.00
On Order Balance: 0.00

Balance Method

Open Item
 Balance Forward

Credit Hold

Credit Hold
Reason:
User:
Credit Hold Date:

Payment

Type: Check
 Print Draft

Miscellaneous

Statement Cycle:
Terms:
Days Over Invoice Date/ Due Date:
Aged Posted Balance Limit: 0.00

LCR Required
 Finance Charge
 Pull Up Orders

Customers

Inbox

Remove

Customer - D1S11RF_05 - Newly requested ...
[Show more](#)

TODAY AT 5:41:21 PM

Approve Reject

Approved

Name

D1S11RF_05

New Credit Limit

2000000.00

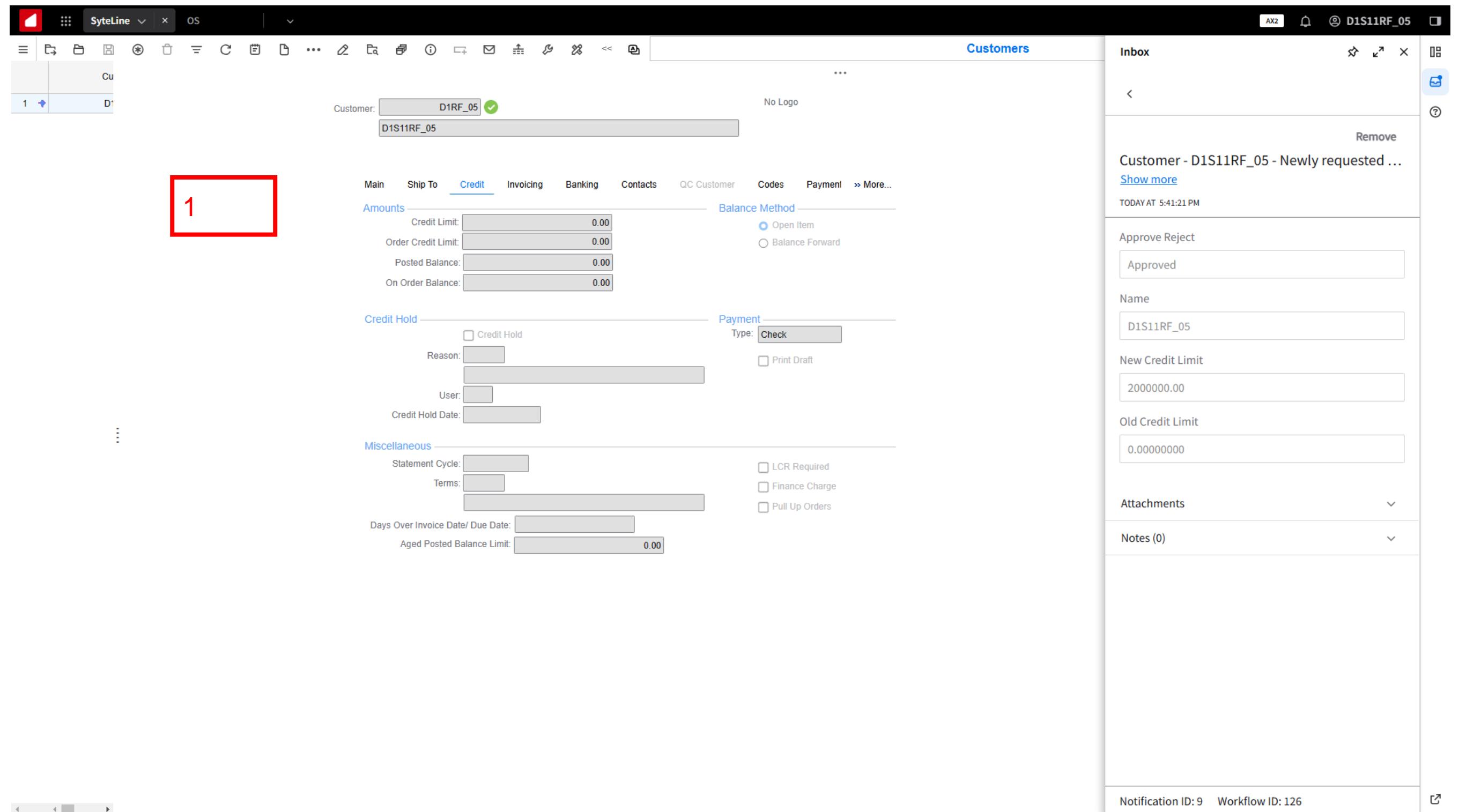
Old Credit Limit

0.00000000

Attachments

Notes (0)

Notification ID: 9 Workflow ID: 126



1. RIGHT CLICK in the white space to the left of the form



The screenshot shows the Infor SyteLine application interface. The main window displays the 'Customers' screen for customer 'D1S11RF_05'. A context menu is open on the left, with the first item, 'Refresh current', highlighted by a red box and a number '1'. The menu also includes options like 'Ship To', 'Credit', 'Invoicing', 'Banking', 'Contacts', 'QC Customer', 'Codes', 'Payment', and 'More...'. The 'Credit' tab is selected. On the right, there's an 'Inbox' panel showing a notification for 'Customer - D1S11RF_05 - Newly requested ...' with an 'Approved' status. The URL at the bottom is: https://csi10b.erpsl.inforcloudsuite.com/WSWebClient/WSWebForm.aspx?config=SLSGDEN209_AX2_DALS&tenant=SLSGDEN209_AX2&configgroup=SLSGDEN209_AX2&forceSSO=1&stype=full&HybridCertified=1&Responsive=notresponsive&portalV2Certified=1&MultiTenantCertified=1&tenant_config_group=SLSGDEN209_AX2&LogicalId=id:/...

1. SELECT Refresh Current



The screenshot shows the SyteLine application interface. The main window displays the 'Credit' tab for customer 'D1S11RF_05'. The 'Credit Limit' field is highlighted with a red border and contains the value '2,000,000.00'. The 'Payment' method is set to 'Check'. The sidebar on the right shows a notification for a new request from customer 'D1S11RF_05'.

Customer: D1S11RF_05

Main Ship To Credit Invoicing Banking Contacts QC Customer Codes Payment > More...

Amounts

Credit Limit: 2,000,000.00
Order Credit Limit: 0.00
Posted Balance: 0.00
On Order Balance: 0.00

Balance Method: Open Item (selected)

Credit Hold: Credit Hold (unchecked), Reason: (text box), User: (text box), Credit Hold Date: (text box)

Payment: Type: Check

Miscellaneous: Statement Cycle: (dropdown), Terms: (dropdown), Days Over Invoice Date/ Due Date: (text box), Aged Posted Balance Limit: 0.00

Balance Method: Open Item (selected)
Balance Forward (unchecked)

Approve Reject: Approved

Name: D1S11RF_05

New Credit Limit: 2000000.00

Old Credit Limit: 0.00000000

Attachments

Notes (0)

Notification ID: 9 Workflow ID: 126

1. The record is unlocked, and the credit limit has been updated to the new value.

infor®



Mary Zecca

Technical Solution Consultant

715.409.6392

Mary.Zecca@Infor.com