

GP Approval Workflow:

MS-SOAPW-02 · Sales Order GP Approval Workflow

Code:

Description:

Category:

Enabled: ☒

Workflow Steps		
Decrease Indent Increase Indent Delete Event Conditions Find		
When Event	On Condition	Then Response
Approval of a sales document is requested.	Document Type: Quote Order Invoice, Sell-to Customer No.: <> 0139860, Customer Pri...	(+) Add record restriction.
An approval request is approved.	<Always>	(+) Remove record restriction.
An approval request is rejected.	<Always>	(+) Reject the approval request for the record and cre...
An approval request for a sales document is canceled.	Document Type: Order, Status: Pending Approval	(+) Cancel the approval request for the record and cre...
An approval request is delegated.	<Always>	Send approval request for the record and create a noti...

Credit Limit Exceeded Workflow:

MS-SOCLAPW-05 · Sales Order Credit Limit Approval Workflow - Nazeer

Code:

Description:

Category:

Enabled: ☒

Workflow Steps		
Decrease Indent Increase Indent Delete Event Conditions Find		
When Event	On Condition	Then Response
Approval of a sales document is requested.	Document Type: Order, Status: Open, Credit Controller User ID: DENTAL\NAZEER DEN...	Check if the customer credit limit is exceeded.
A customer credit limit is exceeded.	<Always>	(+) Set document status to Pending Approval.
An approval request is approved.	Pending Approvals: 0	Release the document.
An approval request is approved.	Pending Approvals: > 0	Send approval request for the record and create a noti...
An approval request is rejected.	<Always>	(+) Reject the approval request for the record and cre...
An approval request for a sales document is canceled.	Document Type: Order, Status: Pending Approval	(+) Cancel the approval request for the record and cre...
An approval request is delegated.	<Always>	Send approval request for the record and create a noti...
A customer credit limit is not exceeded.	<Always>	(+) Set document status to Pending Approval.