



ACCOUNTS PAYABLE INVOICE PROCESSING WORKFLOW APPLICATION



WAG™

Web App Generator™

Democratizing Application Development™



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Overview

With WAG™ everyone can create custom mobile and web apps and run them for large scale audiences – free of charge.

The types of apps that can be created with WAG™ include: Consumer, Business, Government (including GovCloud), Healthcare, Education, Non-Profits and many other verticals.

An app that takes several programmers one year to develop, takes a few days to create using WAG™ - without requiring programming experience.

WAG™ is unlike any other product on the market. WAG™ empowers people to do things that they just can't do today. We call this *democratizing application development™*.

Create your app once - and it runs on all the major desktop browsers and all the major mobile devices as a native app on, just the way Facebook can be accessed via a web browser and via a native mobile app.





Objective

In this document we take a look at an Accounts Payable Invoice Processing Workflow Application. If you're interested in creating corporate workflow apps with backend integration, you this document will guide you Step by Step. Variations of this app are very popular with our large corporate customers.

Before we begin, we will need to identify just what will go into our Accounts Payable Invoice Processing workflow app. A quick glance at Wikipedia states:

"Once the invoice arrives the clerk classifies and sorts the invoice into various categories.

The invoice is forwarded to the responsible person for that particular invoice. This is normally the person who has placed that order. If there has been a purchase order involved when placing that order, the invoice must then be matched against the purchase order to ensure that the amount invoiced is correctly stated on the invoice. If the amount is right and the goods have arrived, the responsible person will have to approve the invoice by signing off on it.

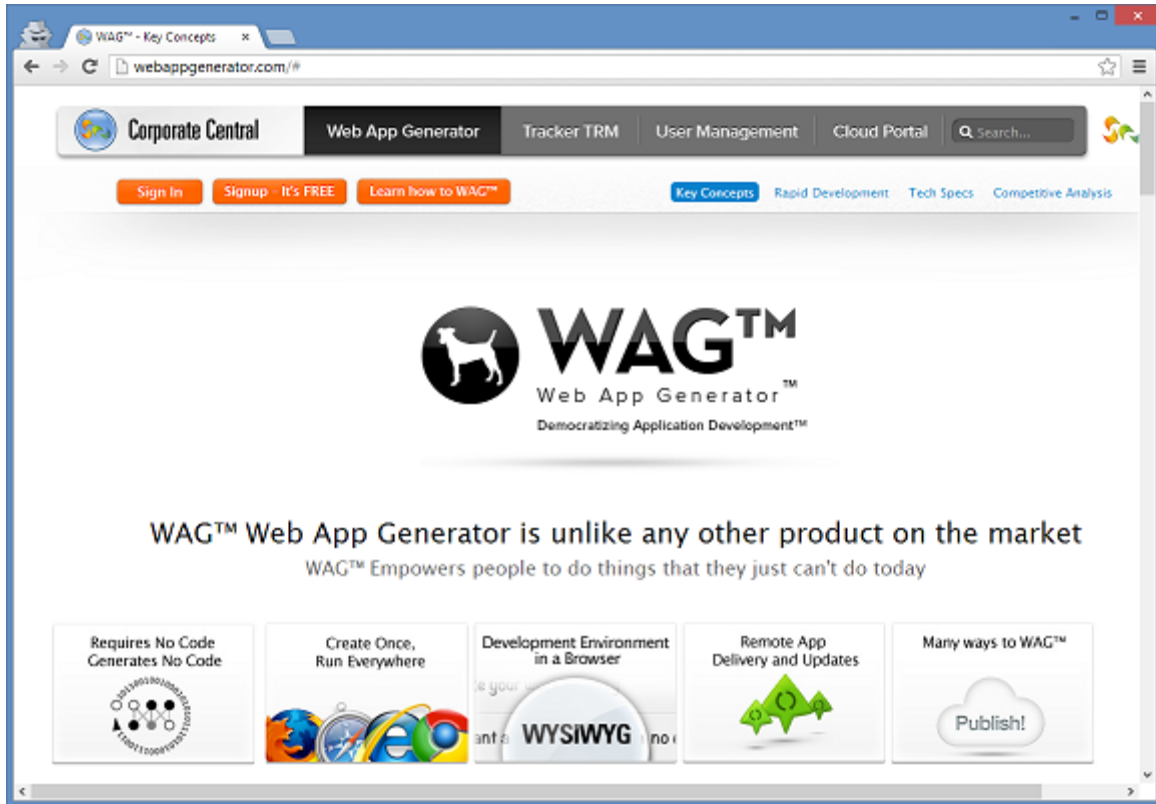
If the amount invoiced exceeds a certain amount that is limited by the organization, the superior of that person may have to approve the invoice as well. Once the invoice has been approved and there have been no variances, the invoice is posted into the accounting system."

This breaks down into our workflow:

1. Invoice is entered and forwarded to an approver.
2. The approver examines the invoice and gives it his/her approval.
3. Manager reviews the invoice. He assigns it to an accountant.
4. Accounting organizes payment.

Visit <http://www.youtube.com/WebAppGenerator>

WAG™ Web App Generator allows you to create mobile and web apps that run on all major devices.



❖ Step 1. Getting Started With WAG™

❖ Create an Account

1. Go to www.webappgenerator.com
2. Click the **Signup—It's FREE** button.
3. Fill out the Form with your information and click **Signup**.
4. Check your email account. You should receive an email message with a link to activate your subscription (if you don't see the email, check your spam folder).

Once you've activated your subscription, return to webappgenerator.com and click **Sign In**.

❖ Creating Application Named Accounting



Accounting User Mode | Design Mode

Learn how to WAG™

Logged in as John Doe :: Log Off

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Edit Application

Application Information		
Application Name:	Accounting	Name of the application
Application Description:		Description of the Application (Optional)
Application Theme:	iOS Inspired (Global)	Theme of the application.
Private:	<input type="checkbox"/>	Private Application will not be displayed in Application List.
Email Address for Testing:		All Email Actions will be sent to the comma delimited email address list entered here, overriding application and global definitions
UM System ID:	2672d8d3-88eb-4801-b3c9-94a84a9abecc	User Management System ID of the Application

Choose Application Design Template

No Design Template Select a WAG™ Application to use as my Design Template

Allow design changes: If Checked, changes will be allowed to the application design

Save Delete Cancel

Step 2. Creating a New Application

- ❖ Now you are ready to create your new application
 1. Click Add New Application
 2. In the above screen, enter your Application Name in this case *Accounting*
 3. Click Create Application to continue.

We will use this application as the reference for our main, Accounts Payable Invoice Processing workflow application.

- ❖ Create New Form Named Approver



Accounting User Mode | Design Mode

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Forms
Add a New Form

1. Click on Add New Form in the Design Mode

❖ Name the new Form

Save Cancel

Name *: Approver|

Description:

Select a Type to Copy:

2. Click in the Name field and type Approver
3. Click Save



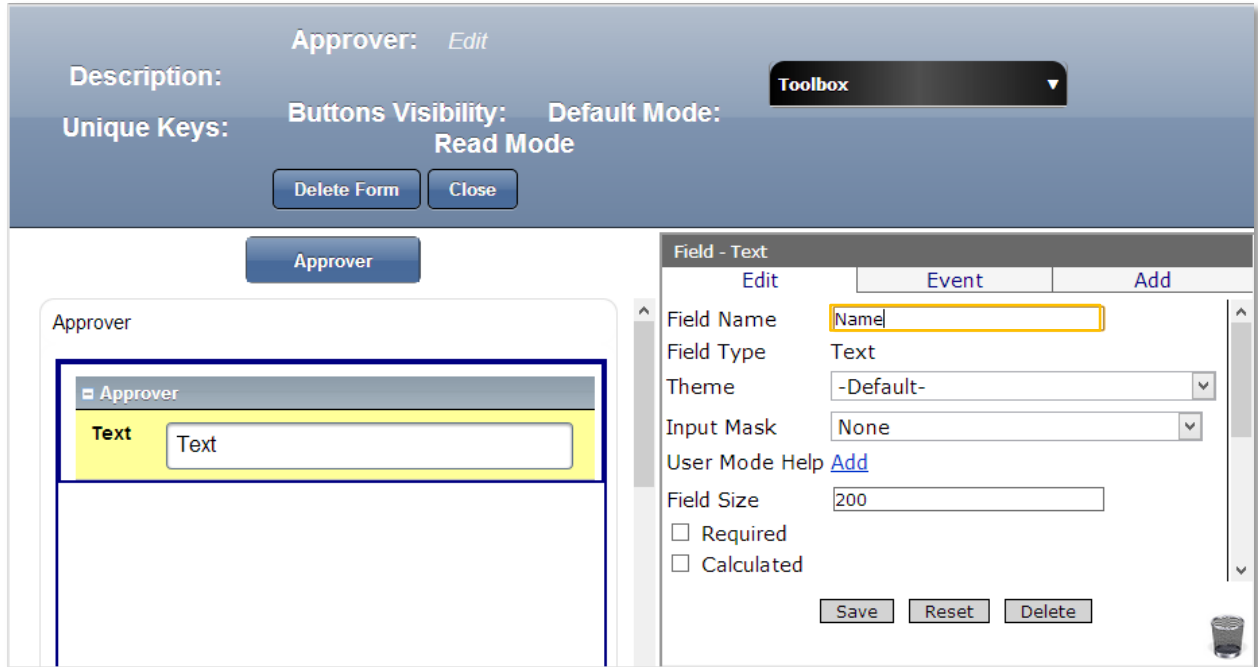
❖ Create Text Field named *Name*

The screenshot displays the WAG software interface. At the top, there is a header bar with the text "Approver: Edit", "Description:", "Unique Keys:", "Buttons Visibility:", and "Default Mode: Read Mode". Below this are buttons for "Delete Form" and "Close". A blue button labeled "Approver" is positioned above the main form area. The main form area is titled "Approver" and contains a section with a yellow background and a text field labeled "Text". A yellow box highlights this text field, and a yellow arrow points from the "Text" field in the "Toolbox" to it. The "Toolbox" is a panel on the right side of the interface, listing various field types: Button, Calendar Date, Combo Box, Date, List, Memo, Number, Query List, Record ID, Text (highlighted), UNITE Names, and Yes/No. Above the "Toolbox" is a "Field - Text" configuration panel with tabs for "Edit", "Event", and "Add". The "Edit" tab is active, showing "Field Name" as "Text" and "Field Type" as "Text". At the bottom of the interface are buttons for "Save", "Reset", and "Delete".

✓ Drag and drop a text field from the Toolbox in the Approver Section



❖ Name the Text Field



1. In the Properties Box click the Field Name and type "Name"
2. Click Save.



❖ Create Text Field Named Email

The screenshot displays the WAG software interface for configuring a form. At the top, there is a header bar with the text "Approver: Edit" and "Description:". Below this, there are fields for "Unique Keys:", "Buttons Visibility:", and "Default Mode:", with "Read Mode" selected. There are "Delete Form" and "Close" buttons. A blue "Approver" button is also visible. The main area shows a preview of the "Approver" form with two text fields: "Name" and "Text". The "Text" field is highlighted in yellow, and a yellow arrow points from the "Text" field in the "Toolbox" on the right to this field in the preview. The "Toolbox" is open, showing a list of field types: Button, Calendar Date, Combo Box, Date, List, Memo, Number, Query List, Record ID, Text (highlighted), UNITE Names, and Yes/No. At the bottom of the toolbox, there are "Save", "Reset", and "Delete" buttons.

- ✓ Drag and drop a text field beneath the Name Text field



❖ Name the Text Field

The screenshot shows the WAG software interface. At the top, there is a header bar with the text "Approver: Edit" and a "Toolbox" dropdown menu. Below this, there are labels for "Description:", "Unique Keys:", "Buttons Visibility:", and "Default Mode: Read Mode". There are two buttons: "Delete Form" and "Close".

The main workspace shows a form titled "Approver" with a blue button labeled "Approver". Inside the form, there is a section titled "Approver" containing two text fields. The first field is labeled "Name" and the second is labeled "Text". The "Text" field is highlighted in yellow.

On the right side, the "Field - Text" properties box is open. It has tabs for "Edit", "Event", and "Add". The "Edit" tab is selected. The properties are as follows:

- Field Name: Email
- Field Type: Text
- Theme: -Default-
- Input Mask: None
- User Mode Help: Add
- Field Size: 200
- Required:
- Calculated:
- Visibility Control:
- Editability/Enable Control:
- User Input Validation:
- Set Default Value:
- Display Order: 1

At the bottom of the properties box, there is a "Location:" label and three buttons: "Save", "Reset", and "Delete".

1. In the Properties Box click the Field Name and type Email
2. Click Save.



❖ Create Number Field Named Threshold

Approver: *Edit*

Description:

Unique Keys: Buttons Visibility: Default Mode: Read Mode

Delete Form Close

Approver

Approver

Name Text

Email Text

Number Number

Field - Number

Edit Event Add

Field Name Number

Field Type Number

Toolbox

- ▼ Tabs/Column
- ▼ Section 010
- ▲ Fields
 - Button
 - Calendar Date
 - Combo Box
 - Date
 - List
 - Memo
 - Number
 - Query List
 - Record ID
 - Text
 - UNITE Names
 - Yes/No

Save Reset Delete

- ✓ Drag and drop a Number field from the Toolbox beneath the Text field named Email



❖ Name the Number Field

The screenshot shows a software interface for editing a form. At the top, there is a header bar with 'Approver: Edit' and a 'Toolbox' dropdown. Below this, there are labels for 'Description:', 'Unique Keys:', 'Buttons Visibility:', and 'Default Mode: Read Mode'. There are 'Delete Form' and 'Close' buttons. A blue 'Approver' button is also visible. The main area shows a form titled 'Approver' with three fields: 'Name' (Text), 'Email' (Text), and 'Number' (Number). The 'Number' field is highlighted in yellow. To the right, a 'Field - Number' properties box is open, showing 'Field Name' set to 'Threshold', 'Field Type' set to 'Number', 'Theme' set to '-Default-', and 'Field Format' set to 'General e.g. 2010'. There are several checkboxes for 'Required', 'Calculated', 'Visibility Control', 'Editability/Enable Control', 'User Input Validation', and 'Set Default Value'. At the bottom of the properties box are 'Save', 'Reset', and 'Delete' buttons.

1. In the Properties Box click the Field Name and type Threshold
2. Click Save.



❖ Create List Field Named Department

The screenshot displays the WAG interface for creating a list field. At the top, there is a header bar with the text "Approver: Edit", "Description:", "Unique Keys:", "Buttons Visibility:", "Default Mode:", and "Read Mode". Below this are buttons for "Delete Form" and "Close".

The main form area is titled "Approver" and contains several fields:

- Name**: Text field
- Email**: Text field
- Threshold**: Number field
- List**: List field (highlighted in yellow)

The "Field - List" configuration window is open on the right. It shows the following details:

- Field Name**: List
- Field Type**: List
- Toolbox**: A list of field types including Button, Calendar Date, Combo Box, Date, List, Memo, Number, Query List, Record ID, Text, UNITE Names, and Yes/No. The "List" field type is highlighted with a yellow box.
- Buttons**: Save, Reset, and Delete.

A yellow arrow points from the "List" field in the toolbox to the "List" field in the form, indicating the drag-and-drop action.

- ✓ Drag and drop a List field from the Toolbox beneath the number field named Threshold



❖ Name the Text Field and enter List Values

The screenshot shows a software configuration window for an 'Approver' field. The main form has the following fields:

- Name:** Text
- Email:** Text
- Threshold:** Number
- List:** (highlighted in yellow)

The 'List' field is configured with the following properties:

- Field Name:** Department
- Field Type:** List
- Theme:** -Default-

The 'List Value' table is as follows:

List Value	Remove
Accounting	Remove
Acquisitions	Remove
Budgeting	Remove
Capital	Remove
Finance	Remove
Insurance	Remove
Legal	Remove
Processing	Remove
Real Estate	Remove
Reaserch	Remove
Taxes	Remove

Additional options in the properties box include 'User Mode Help [Add](#)' and a 'Multiple Values' checkbox (unchecked). Buttons for 'Save', 'Reset', and 'Delete' are at the bottom.

1. In the Properties Box click the Field Name and type *Department*
2. Enter the following values under the *List Value*:
Accounting, Acquisitions, budgeting, Capital, Finance, Insurance, Legal, Processing, Real Estate, Research, Taxes.
3. Click *Save*.
4. Click *Close*
5. Click *Views*



- ❖ Create New Form Named Currency

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Design Home Forms Views Applications Themes

Forms

Add a New Form

Form	Public Access Settings
Approver	None

1. Click *Add a New Form*

Save Cancel

Name *: Currency

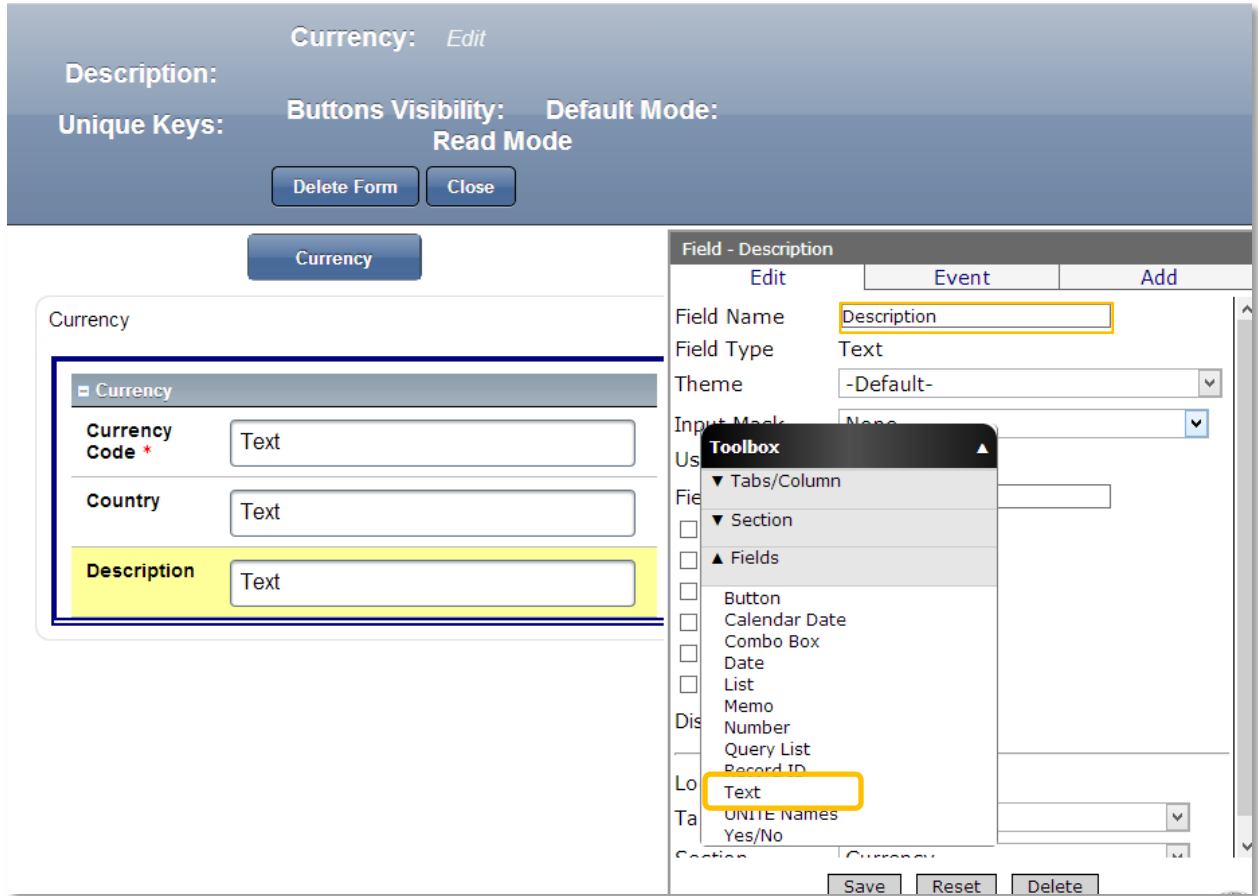
Description:

Select a Type to Copy:

2. Type Currency in the Name Field.



- ❖ Create three text fields and Name them as Currency Code, Country and Description



- ✓ Drag and drop three text fields from the Toolbox.
 1. Click on Field Name in the Properties Box and type Currency Code, Country and Description for each text field.
 2. Red Asterisks mean the field is required, Check the box next to require in the properties box.
 3. Click Save each time you name the text field.



- ❖ Create a New Form Named Vendor

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Forms Add a New Form

Form	Public Access Settings
Approver	None
Currency	None

- 1) Click Add New Form

Save Cancel

Name *: Vendor

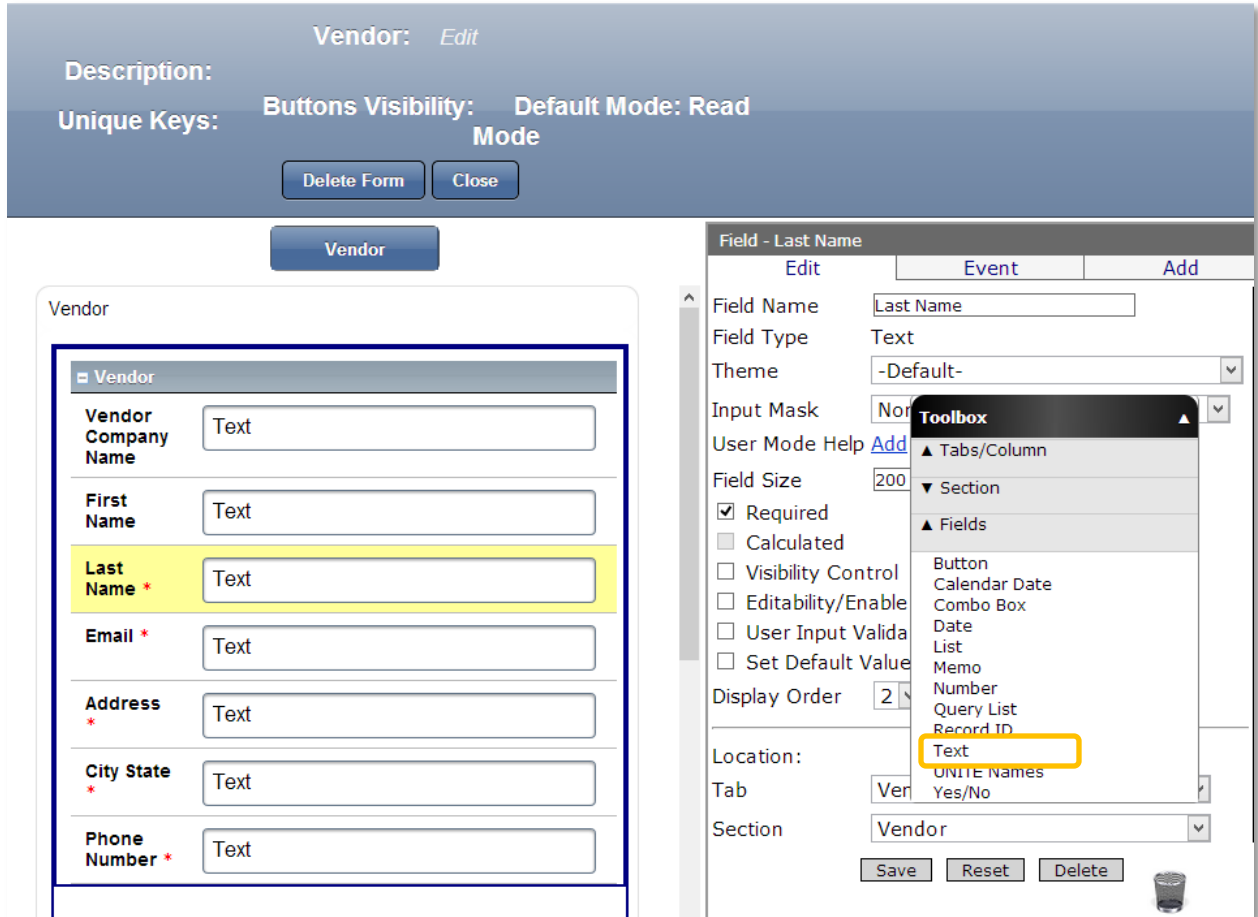
Description:

Select a Type to Copy:

- 2) Type Vendor in the vendor name and Click Save.



- ❖ Create six text fields and Name them as shown on the screenshot.



- ✓ Drag And Drop six texts Fields from the toolbox on the Vendor Section.

1. Name the Fields as: **Vendor Company Name**, **First Name**, **Last Name**, **Email**, **Address**, **City State**, and **Phone Number**.
2. Those fields that have red Asterisk * are required, check the box next to **Required** in the Properties Box for the fields shown on the screen.
3. Click **Save** after naming each field



❖ Creating Views

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Views

Add a New View

1. Click on Add New View

Key point

Views are to show or hide records, make them searchable, organize them in a certain order or to enter values. After you create all the Views in Design Mode you will immediately be able to try your application as a user.



❖ Name the view

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[Design Home](#) [Forms](#) [Views](#) [Applications](#) [Themes](#)

[Save](#) [Delete](#) [Close](#)

View Name

Forms: ▾

Extra Information Show Form Show Created By Show Created Date Show Last Updated By
 Show Last Updated Date Show Available Actions

Field Name	Show in View	Searchable	Default Search
Approver			
Approver			
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Threshold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>

1. Type *Approvers* in the View Name
2. Check the boxes along the **Name, Email, Threshold, Department** as shown on the screen
3. Click *Save*



- ❖ Add view for Currency Form.

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Views

[Add a New View](#)

View Name	Default View	View Fields	Edit Display Info
Approvers	Yes	Name, Email, Threshold, Department	Edit Display Info

1. Click on Add a New View



- ❖ Name the new view.

Mode | Design Mode Learn how to WAG™ Logged in as John Doe :: Log Off

Design Home Forms Views Applications Themes

Edit View Display Information

Save Delete Close

View Name:

Forms: ▼

Extra Information Show Form Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions

Field Name	Show in View	Searchable	Default Search
Currency			
Currency			
Currency			
Currency Code*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>

2. Type Currency in the View Name
3. Chose Currency from the drop down list next to forms
4. Check the boxes as shown on the screenshot for Currency code, country and description.



❖ Create View For Vendors

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[Design Home](#) [Forms](#) [Views](#) [Applications](#) [Themes](#)

Views

Add a New View

View Name	Default View	View Fields	Edit Display Info
Approvers	Yes	Name, Email, Threshold, Department	Edit Display Info
Currency	No	Currency Code, Country, Description	Edit Display Info

Click *Add New View*



❖ Name the New View

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Save Delete Close

View Name

Forms: ▾

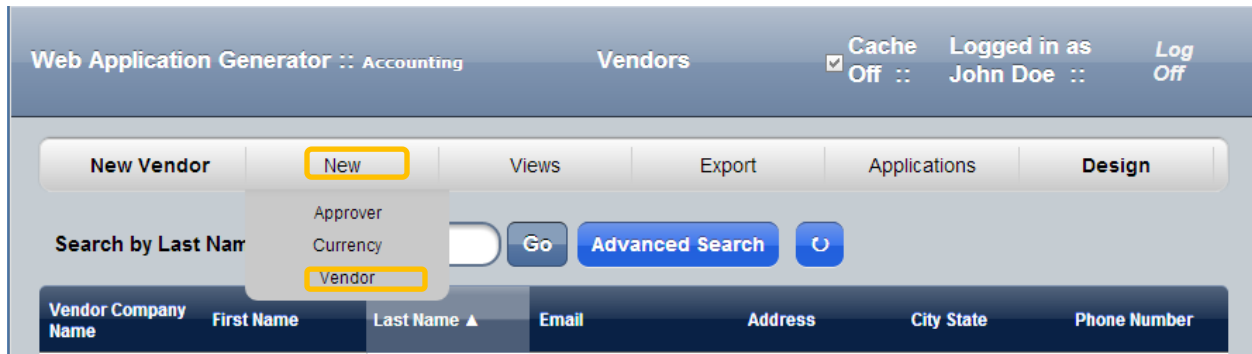
Extra Information Show Form Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions

Field Name	Show in View	Searchable	Default Search
Vendor			
Vendor			
Vendor			
Vendor Company Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Last Name*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Email*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Address*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
City State*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Phone Number*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>

1. Type Vendors in the **View Name**
2. Check all the boxes next to: Vendor Company Name, First Name, Last Name, Email, Address, City State, Phone Number
Click Save



❖ Creating Vendors



1. In the User Mode Click on New
2. Choose Vendor from the drop down List



Vendor ↻

Vendor

Vendor Company Name

First Name

Last Name*

Email*

Address*

City State*

Phone Number*

✓ Enter the following information:

Vendor Company Name:	First Name:	Last Name:	Email:	Address:	City State	Phone Number:
ABC Consulting	Mike	Young	myoung@gmail.com	2157 N California Blvd	Walnut Creek	9258914356

1. Click *Save*



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[New Vendor](#) | [New](#) | [Views](#) | [Export](#) | [Applications](#) | [Design](#)

Search by Last Name [Go](#) [Advanced Search](#) [↻](#)

First Name	Last Name	Email	Address	City State	Phone Number	Vendor Company Name
Mike	Young	myoung@gmail.com	2175 N California Blvd	Walnut Creek CA	9258914536	ABC Consulting
Shira	Solem	shirasolem@gmail.com	138 Gerald L Bates Drive	New York, NY	(346) 259-9144	Shira Y
Michel	Muma	michaelmuma@gmail.com	7638 Barnhart Pl	El Paso, Tx	(280) 311-2681	ElinTN
Elin	Everest	elineverest@gmail.com	12314 Ashford Place Dr	Memphis, TN	(809) 688-2272	Gerald
Tania	Troiano	taniatroiano@gmail.com	4333 Coburn Hollow Road	Boston, MA	(139) 340-5225	YoungHol

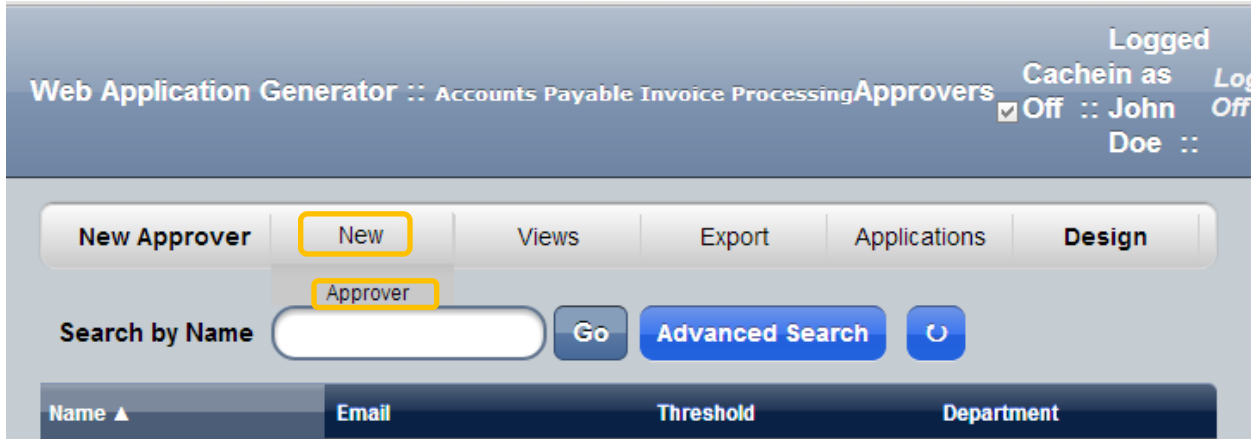
View Application on: [Mobile](#) | [Classic](#)

✓ Keep entering other Vendors; you can use the data from the Table below.

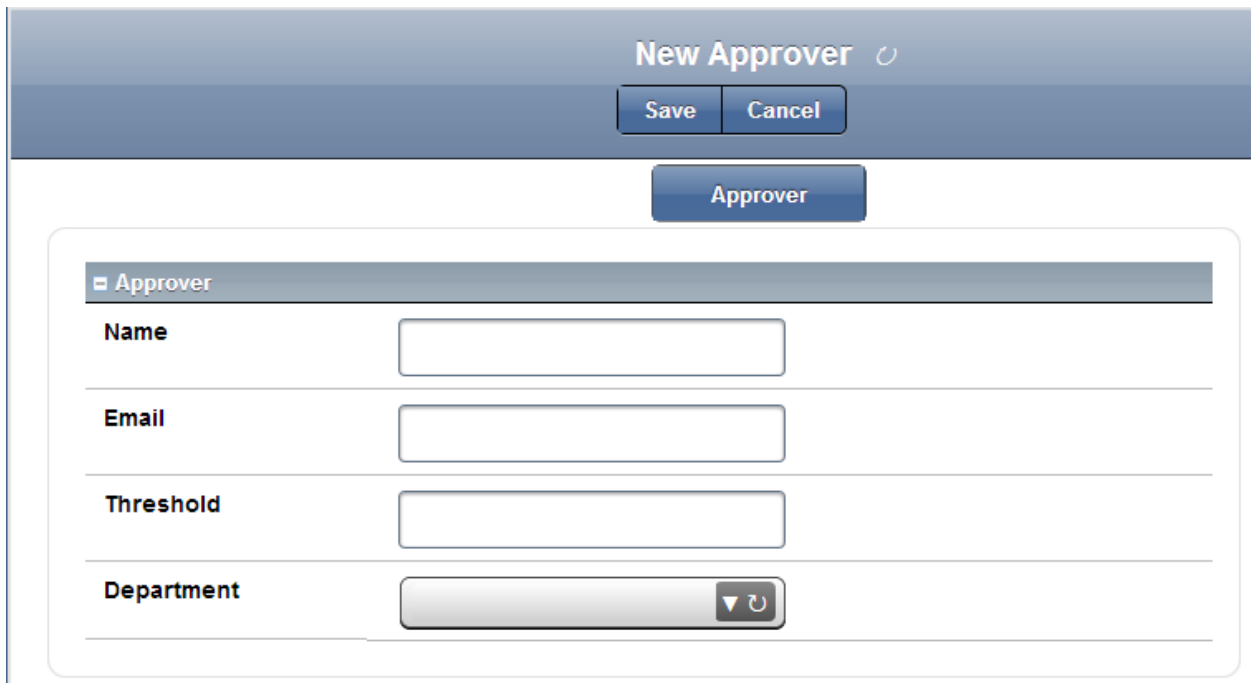
First Name	Last Name	Email	Address	City State	Phone Number	Vendor Company Name
Shira	Solem	shirasolem@gmail.com	138 Gerald L Bates Drive	New York, NY	(346)259-9144	Shira Y
Michael	Muma	mmuma@gmail.com	7638 Brenan dr.	El Paso, Tx	(280)3112681	ElinTN
Elin	Everest	eeverest@gmail.com	12341 Ashford place	Memphis TN	(809)6882272	Gerald
Tania	Troano	ttroano@gmail.com	433 Coburn hollow L	Boston, MA	(139)340-5225	YoungHol



❖ Adding Approvers



1. Click on User Mode
2. Click New
3. Click Approver from the drop down list



- ✓ Enter the following information: **Name:** Alexa Tobias, **Email:** alexatobias@gmail.com, **Threshold:** 1 000 000, **Department:** Choose *Accounting* from the drop down list.



New Approver ↻

Approver

Approver

Name

Email

Threshold

Department ▼ ↻

- Accounting
- Acquisitions
- Budgeting
- Capital
- Finance
- Insurance
- Legal
- Processing
- Real Estate

Web Application Generator :: Accounting **Approvers** Cache Off :: Logged in as John Doe :: [Log Off](#)

Search by Name

Name ▲	Email	Threshold	Department
Alexa Tobias	alexatobias@gmail.com	1000000	Accounting

View Application on: [Mobile](#) | [Classic](#)

- ✓ This is what it looks like in the Approvers list
- ✓ Similarly add other approvers using data from the table



Name	Email	Threshold	Department
Amari Rocha	amarirocha@gmail.com	1000000	Accounting
Ashley Mcadams	ashleymcadams@gmail.com	1000000	Taxes
Catherine Burroughs	catherineburroughs@gmail.com	1000000	Finance
Caira yeager	catherineburroughs@gmail.com	500	Insurance
Ciara crum	ciaracrum@gmail.com	5000	Legal

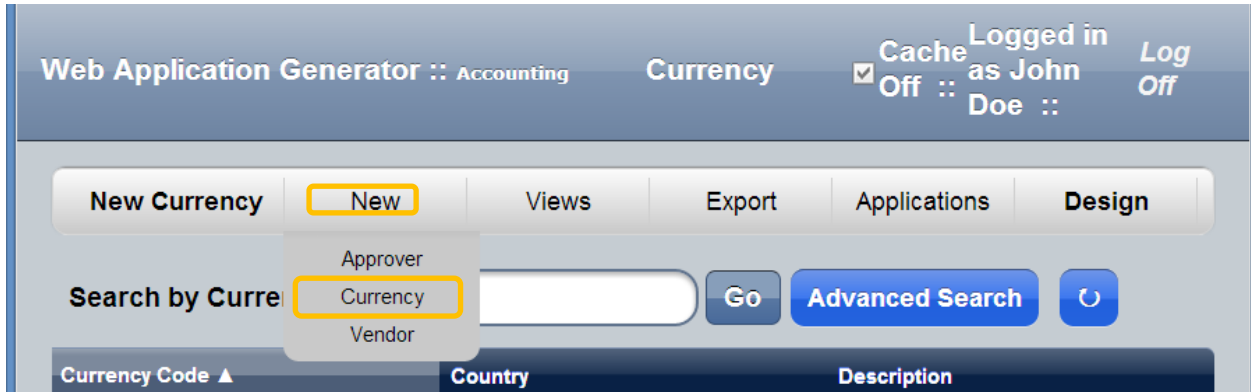
✓ This is what your Approvers list should look like

The screenshot shows a software interface for managing approvers. At the top, there are navigation tabs: "New Approver", "New", "Views", "Export", "Applications", and "Design". Below the tabs is a search section with the text "Search by Name", a text input field, a "Go" button, an "Advanced Search" button, and a refresh button. Below the search section is a table with the following data:

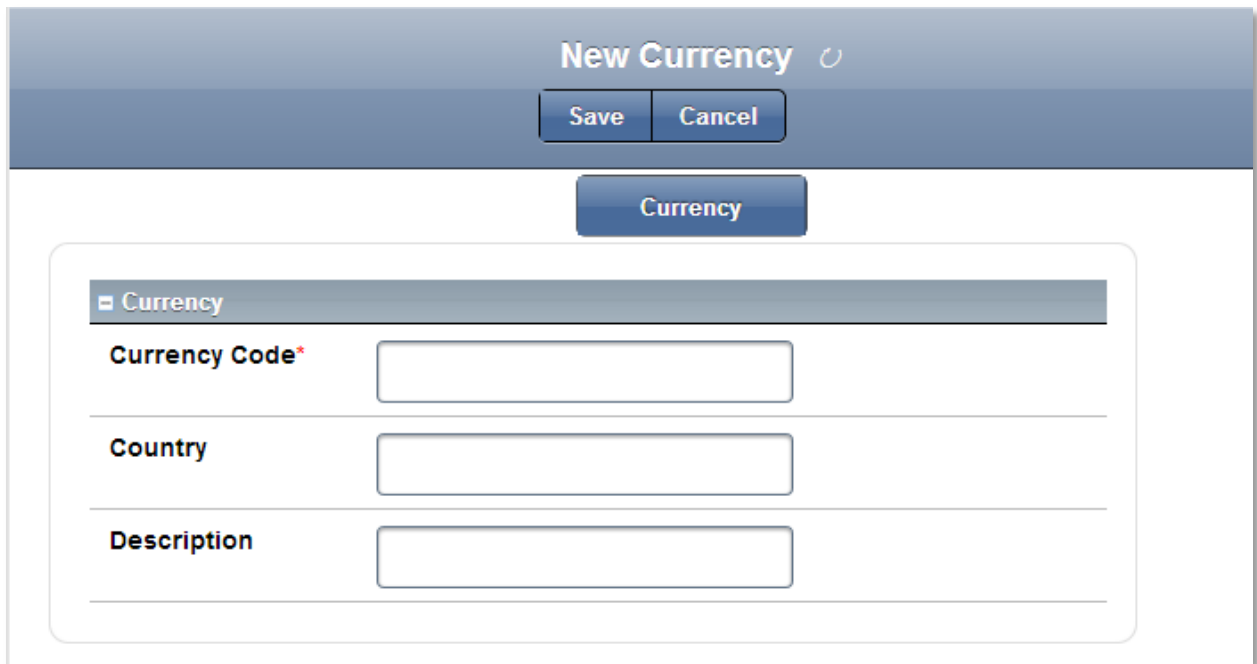
Name ▲	Email	Threshold	Department
Alexa Tobias	alexatobias@gmail.com	1000000	Accounting
Amari Rocha	amarirocha2@gmail.com	1000000	Taxes
Ashley McAdams	ashleymcadamns@gmail.com	1000000	Finance
Catherine Burroughs	catherineburroughs@gmail.com	500	Insurance
Ciara Yeager	ciarayeager@gmail.com	5000	Legal



❖ Adding Currencies



1. In the User Mode go to New Currency:



2. In this New Currency view, add following:

Currency Code:	Country:	Description
USD	United States	United States Dollar.



New Currency ↻

▣ Currency

Currency Code*

Country

Description

3. Click Save.

✓ Keep creating Currencies; enter the following data as shown in the Table below.

Currency Code	Country	Description
USD	United State	United States Dollar
CAD	Canada	Canadian Dollar
CNY	China	Chinese Yuan
BRL	Brazil	Brazilian Real



Currency Code ▲	Country	Description
USD	United States	United States dollar
CAD	Canada	Canadian dollar
CNY	China	Chinese yuan
BRL	Brazil	Brazilian real

1. Click Design

Vendor Company Name	First Name	Last Name ▲	Email	Address	City State	Phone Number
---------------------	------------	-------------	-------	---------	------------	--------------

2. click Applications,

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3. Click Accounts Payable Invoice Processing Workflow Application.



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Applications

Create a New Application Test Connection

Application

Accounting

4. Click Create a New Application

❖ Name the New Application

Invoice Application User Mode | Design Mode Learn how to WAG™ Logged in as John Doe :: Log Off

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Edit Application

Application Information

Application Name:	Accounts Payable Invoice Processing Workflow Appl	Name of the application
Application Description:		Description of the Application (Optional)
Application Theme:	Windows Metro (Global)	Theme of the application.
Private:	<input type="checkbox"/>	Private Application will not be displayed in Application List.
Email Address for Testing:	ndavitashvili@softwareprogressions.com	All Email Actions will be sent to the comma delimited email address list entered here, overriding application and global definitions
UM System ID:	cc99e1d8-2bb8-432e-8937-487daa9c63ae	User Management System ID of the Application

Choose Application Design Template

No Design Template Select a WAG™ Application to use as my Design Template

Allow design changes: If Checked, changes will be allowed to the application design

Save Delete Cancel

This is our main Application named Accounts Payable Invoice Processing workflow app. Following slides will demonstrate how to create it.



❖ Creating a New Form

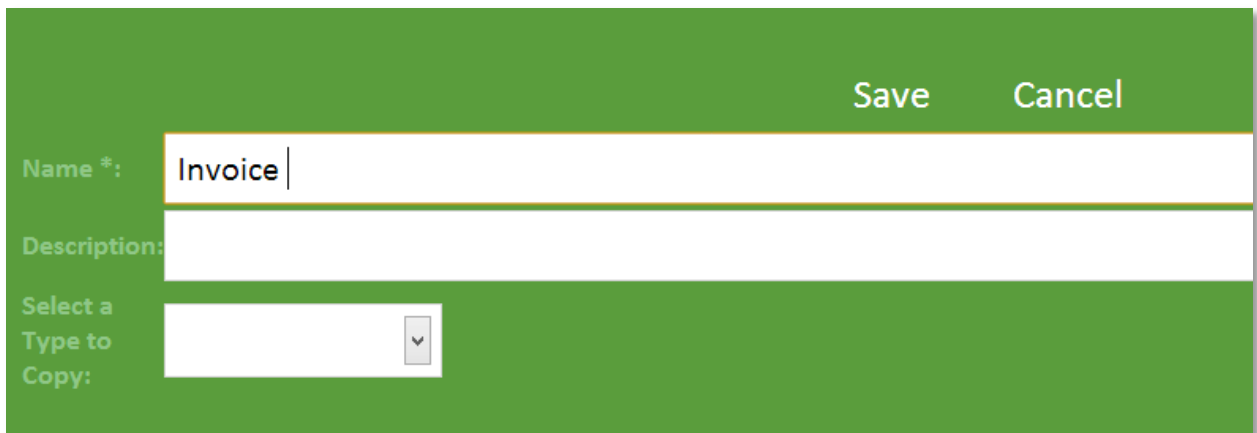


Design Mode

Key Point

Design Mode is where you to create your app.

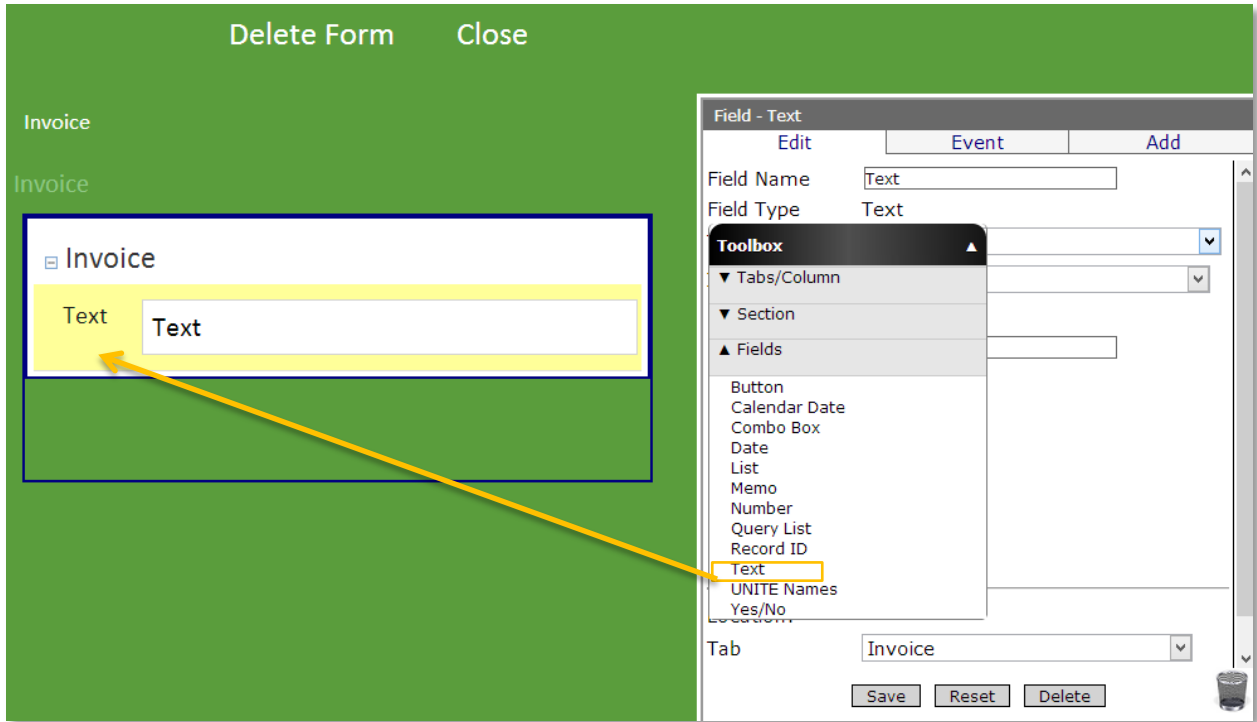
2. Click Add a New Form.



3. Name this form "Invoice" and Click Save.



❖ Creating a Text field named Invoice Number



✓ Drag and drop a Text Field from the Toolbox into the Invoice Section.



❖ Name the Text Field

The screenshot displays the WAG software interface for editing a form. The main workspace is green and contains a form titled 'Invoice' with a 'Text' field highlighted in yellow. A 'Field - Text' properties dialog is open on the right, showing the following settings:

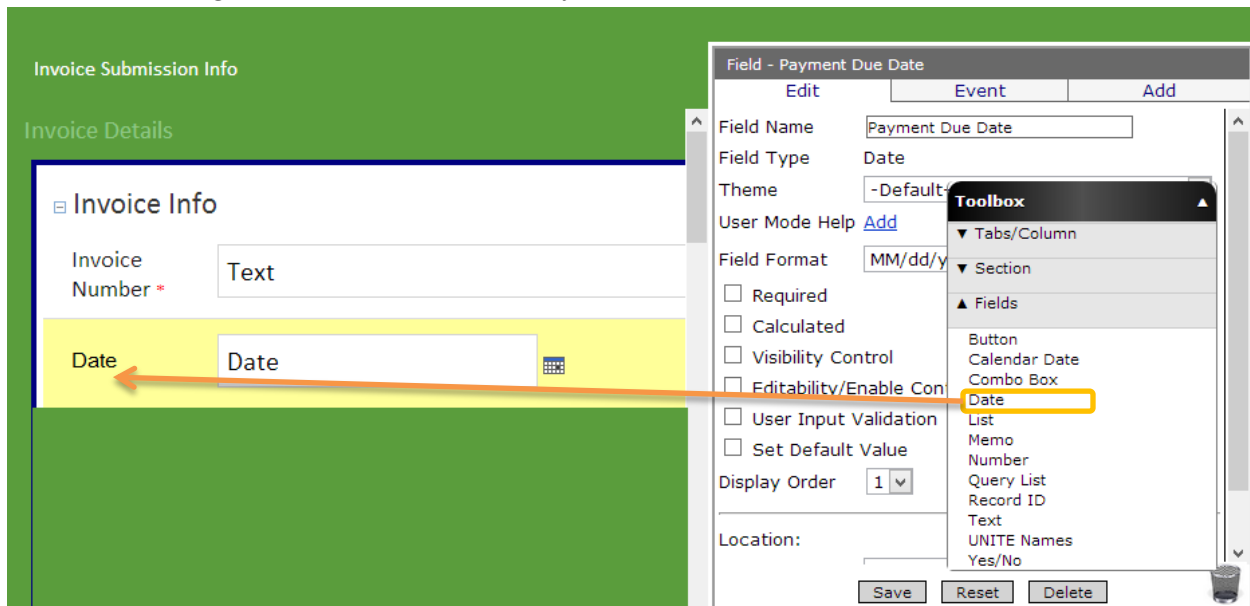
- Field Name: Invoice Number
- Field Type: Text
- Theme: -Default-
- Input Mask: None
- User Mode Help: Add
- Field Size: 200
- Required
- Calculated
- Visibility Control
- Editability/Enable Control
- User Input Validation
- Set Default Value
- Display Order: 0
- Location: Invoice

Buttons for 'Save', 'Reset', and 'Delete' are visible at the bottom of the dialog.

1. In the Properties box type Invoice Number In the Field Name
2. Check the Required box.
3. Click Save.



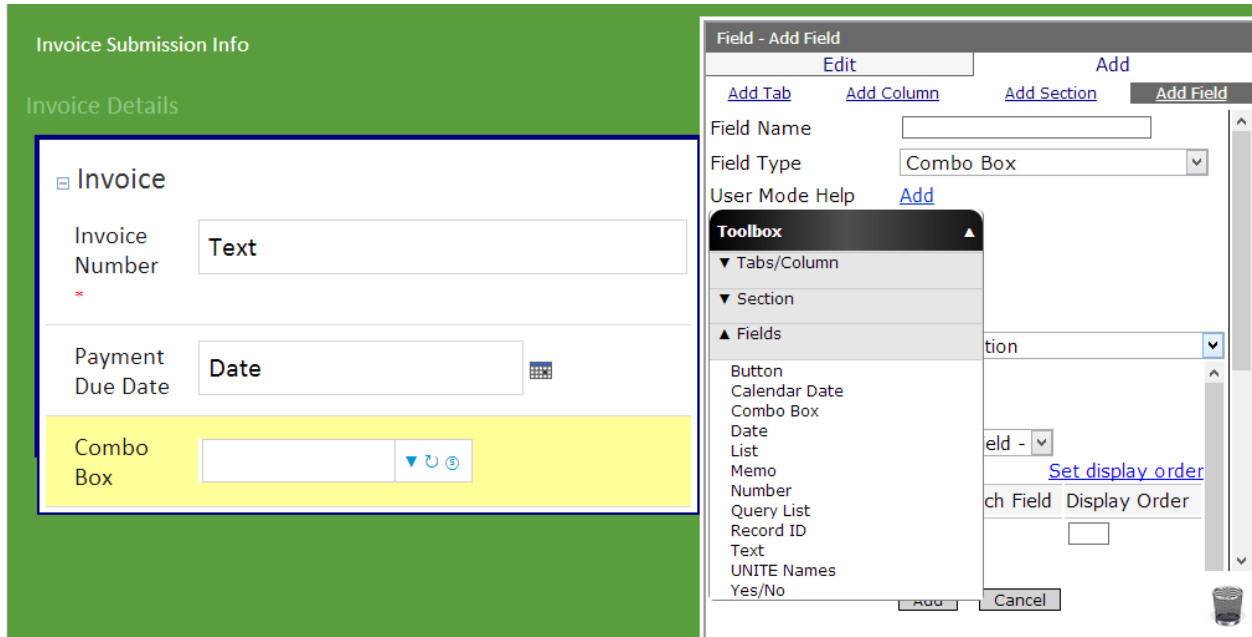
❖ Creating the date field Named Payment Due Date



1. Drag and drop a Date Field from the toolbox beneath the Invoice Number Text Field.
2. In the Properties box type Payment Due Date next to the *Field Name*
3. Click *Save*.



❖ Creating a Combo box field named Currency.



The invoice will specify the currency the vendor desires to be paid in. This field will reflect that.

- ✓ Drag and drop a Combo Box field into our form.

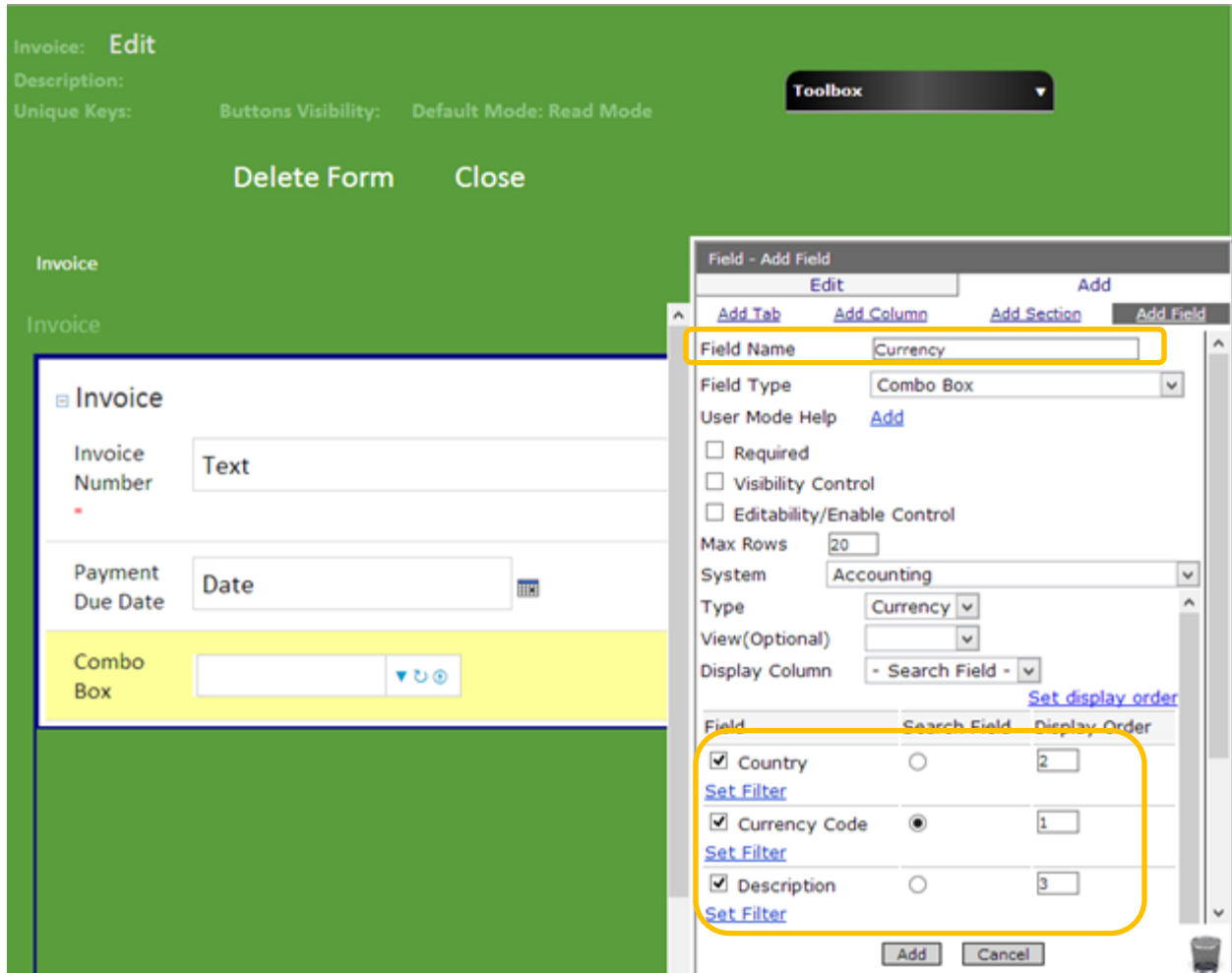
This form will draw from another WAG app called *Accounting*. The following slides will demonstrate building of the Accounting app that will have a list of different currencies and approvers.

Key Point

Combo boxes allow you to view and search through an object's data to ultimately choose a single record.



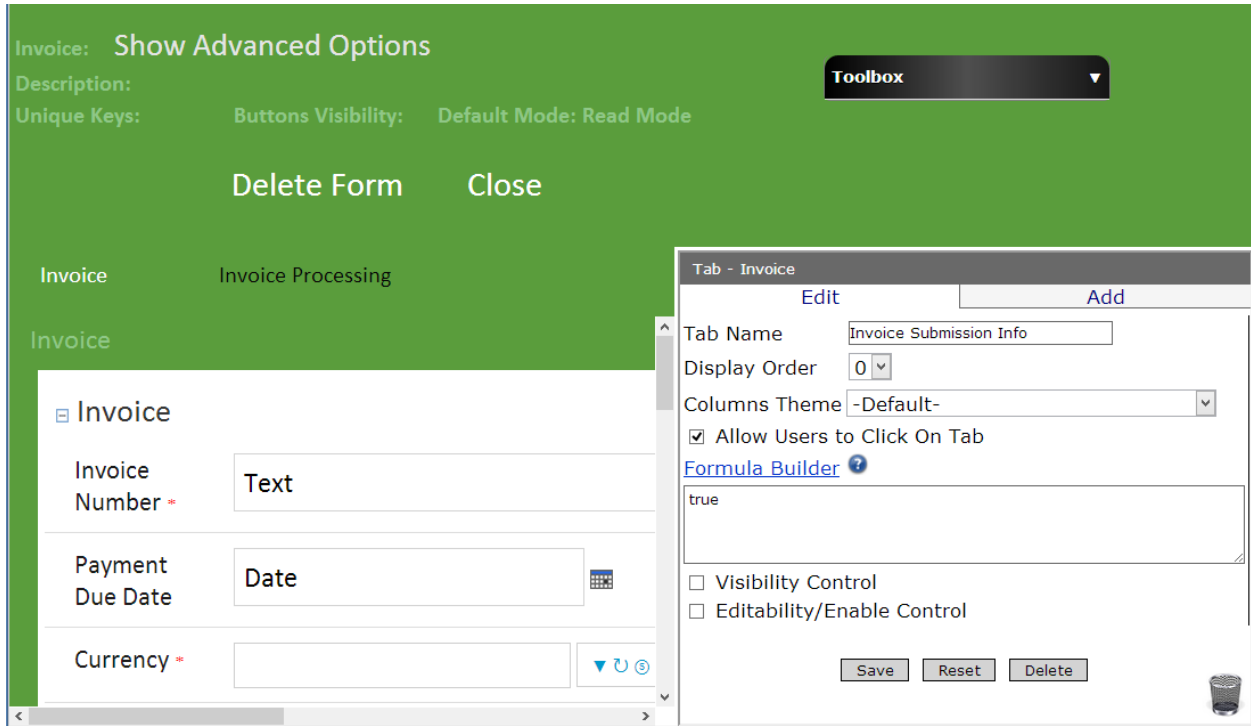
❖ Naming the Combo Box



1. Click in the Field Name in the Properties box and type *Currency*.
2. From the **System** drop down list choose Accounts Payable Invoice Processing.
3. Select **Currency** from the **Type** dropdown menu.
4. Check all fields you want to show for the **Currency Code** mark the search field and set the display order 2,1,3 as shown in the screen and click Save



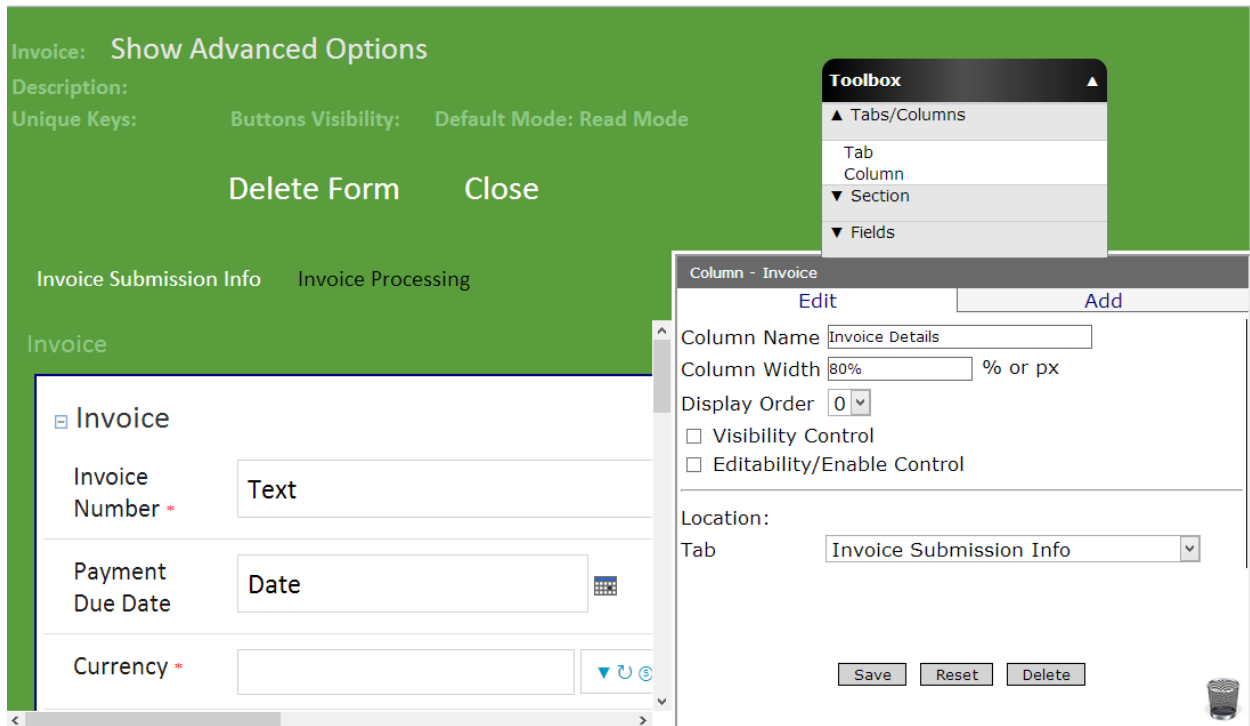
Rename the Tab Invoice to Invoice Submission Info



1. In the Properties Box click in Tab Name and Type Invoice Submission info
2. Click Save



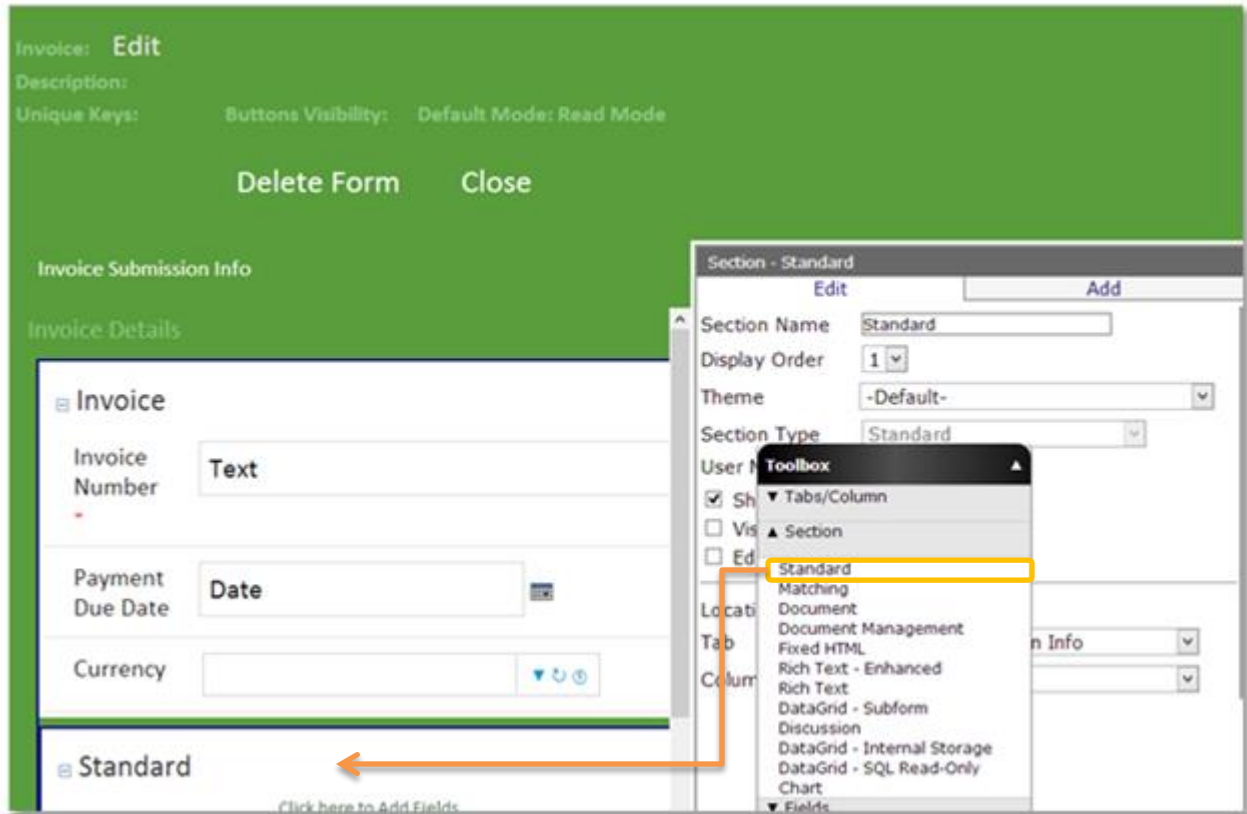
❖ Rename Column Named Invoice to Invoice Details.



1. In the Properties Box Click in Column Name and type Invoice Details
2. Click Save.



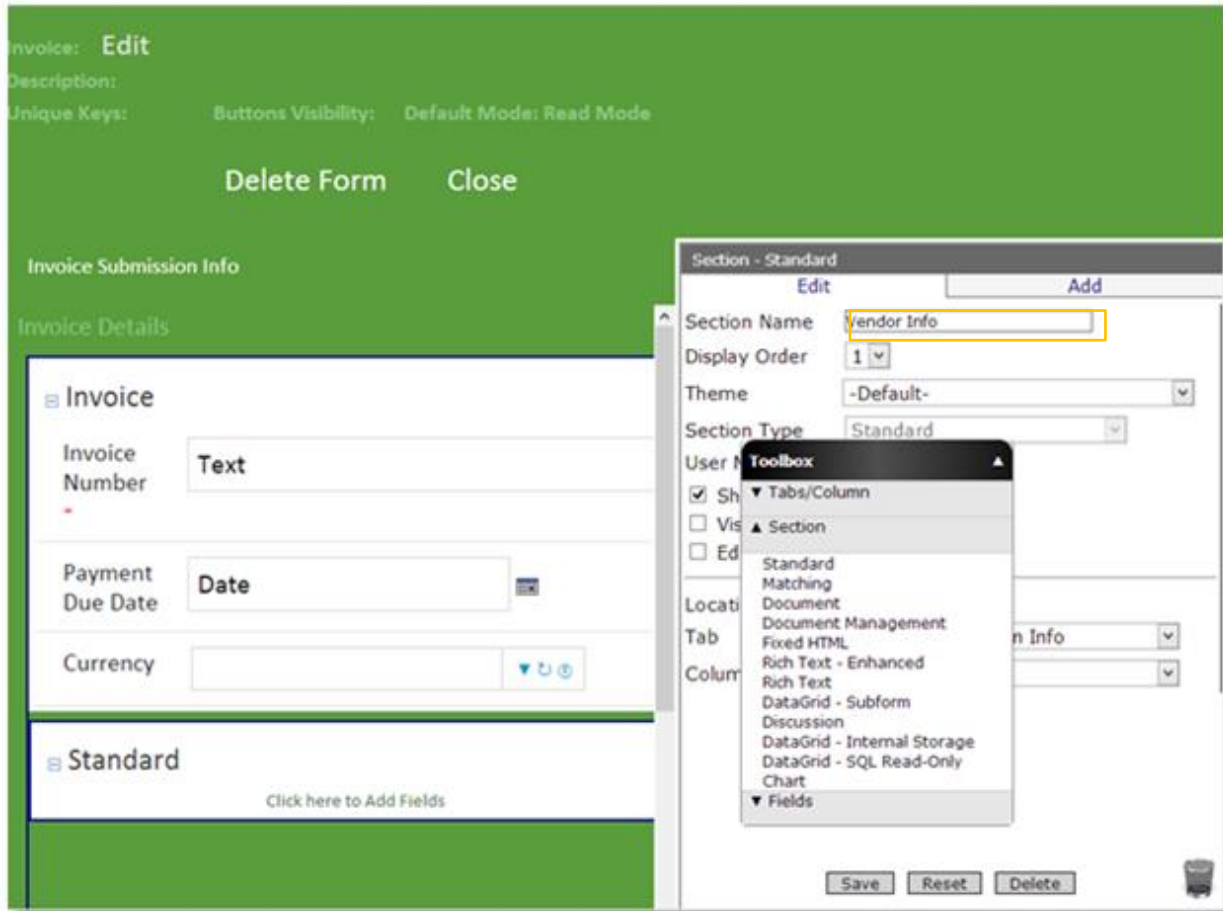
❖ Creating the Standard Section Named Vendor Info



- ✓ Drag and drop a new Standard Section from the Toolbox



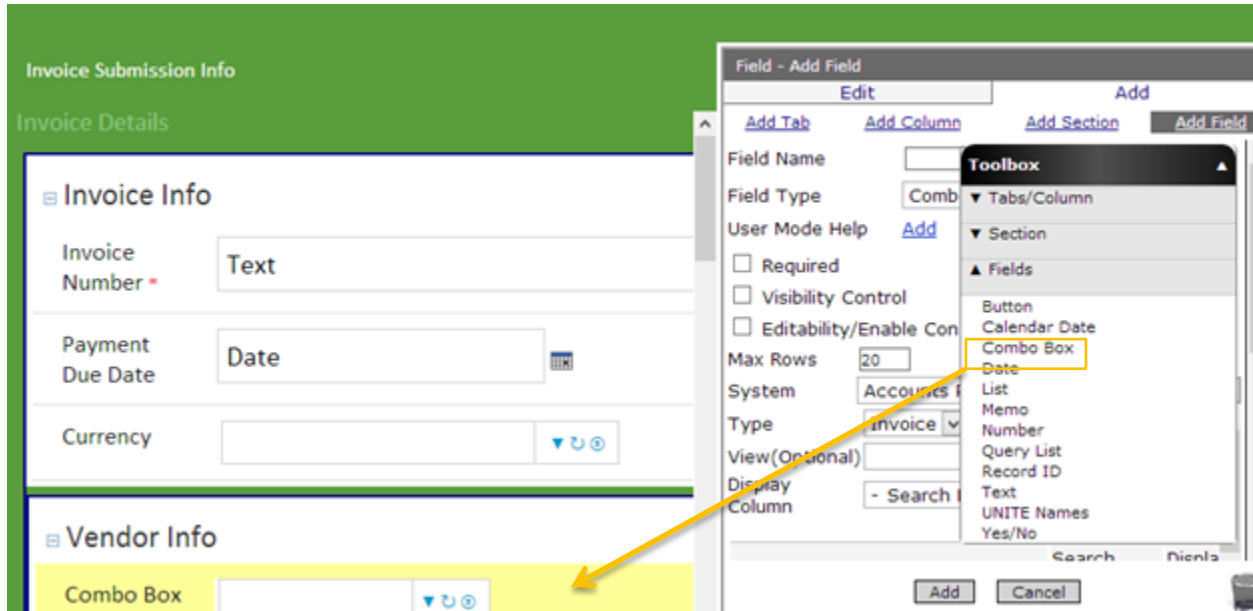
❖ Name the Standard Section



1. In the Properties Box click in Section Name and type "Vendor Info"
2. Click Save



❖ Create Combo Box Named Vendor



✓ Drag and drop a combo box In the Vendor Info Section.



Field - Vendor

Edit Event Add

Field Name

Field Type

Theme

User Mode Help [Add](#)

Required

Visibility Control

Editability/Enable Control

Set Default Value

Display Order

Max Rows

System

Type

View(Optional)

Display Column

[Set display order](#)

Field	Search Field	Display Order
<input checked="" type="checkbox"/> Address Set Filter	<input type="radio"/>	<input type="text" value="4"/>
<input checked="" type="checkbox"/> City State Set Filter	<input type="radio"/>	<input type="text" value="5"/>
<input checked="" type="checkbox"/> Email Set Filter	<input type="radio"/>	<input type="text" value="6"/>
<input checked="" type="checkbox"/> First Name Set Filter	<input type="radio"/>	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Last Name Set Filter	<input type="radio"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Phone Number Set Filter	<input type="radio"/>	<input type="text" value="7"/>
<input checked="" type="checkbox"/> Vendor Company Name Set Filter	<input checked="" type="radio"/>	<input type="text" value="1"/>

Note: Query List Field, UNITE Name Field, and Combo Box Field are not searchable.

Dependencies:

- [City and State](#)
- [Vendor Address](#)
- [Vendor Contact](#)
- [Email Body](#)
- [Vendor Email](#)
- [Vendor Phone](#)

Location:

Tab

Section

❖ Name the

Combo Box

1. In the Properties box click in the Field Name and type Vendor

2. Check the box next to Required

3. Select Accounting from the System dropdown.

4. Select Vendor from the Type dropdown.

1. Check the Address, City State, Email, First Name, Last Name and Phone Number fields.

2. Select Vendor Company Name as the Search Field.

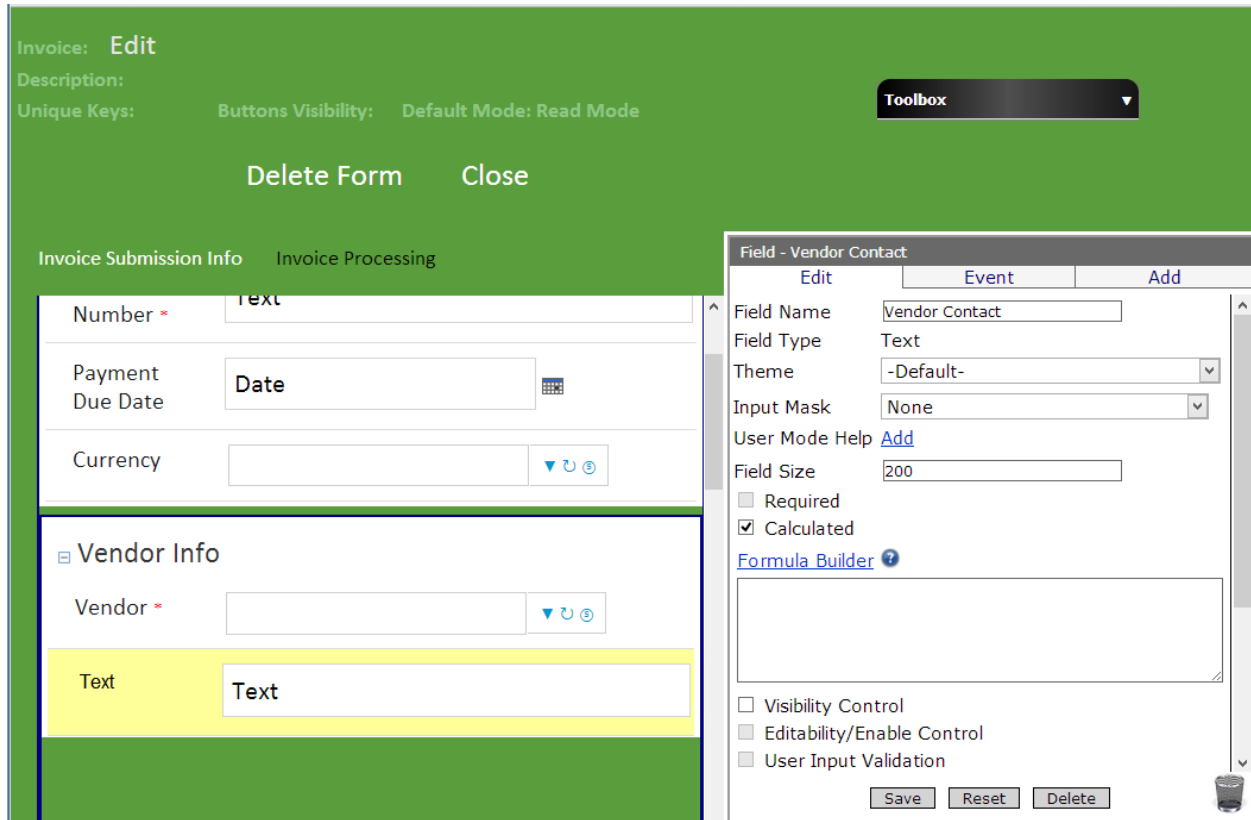
3. Number the fields in Display Order in the order shown on the screen

4. Select Vendor Company Name as the Display Column

5. Click Save.

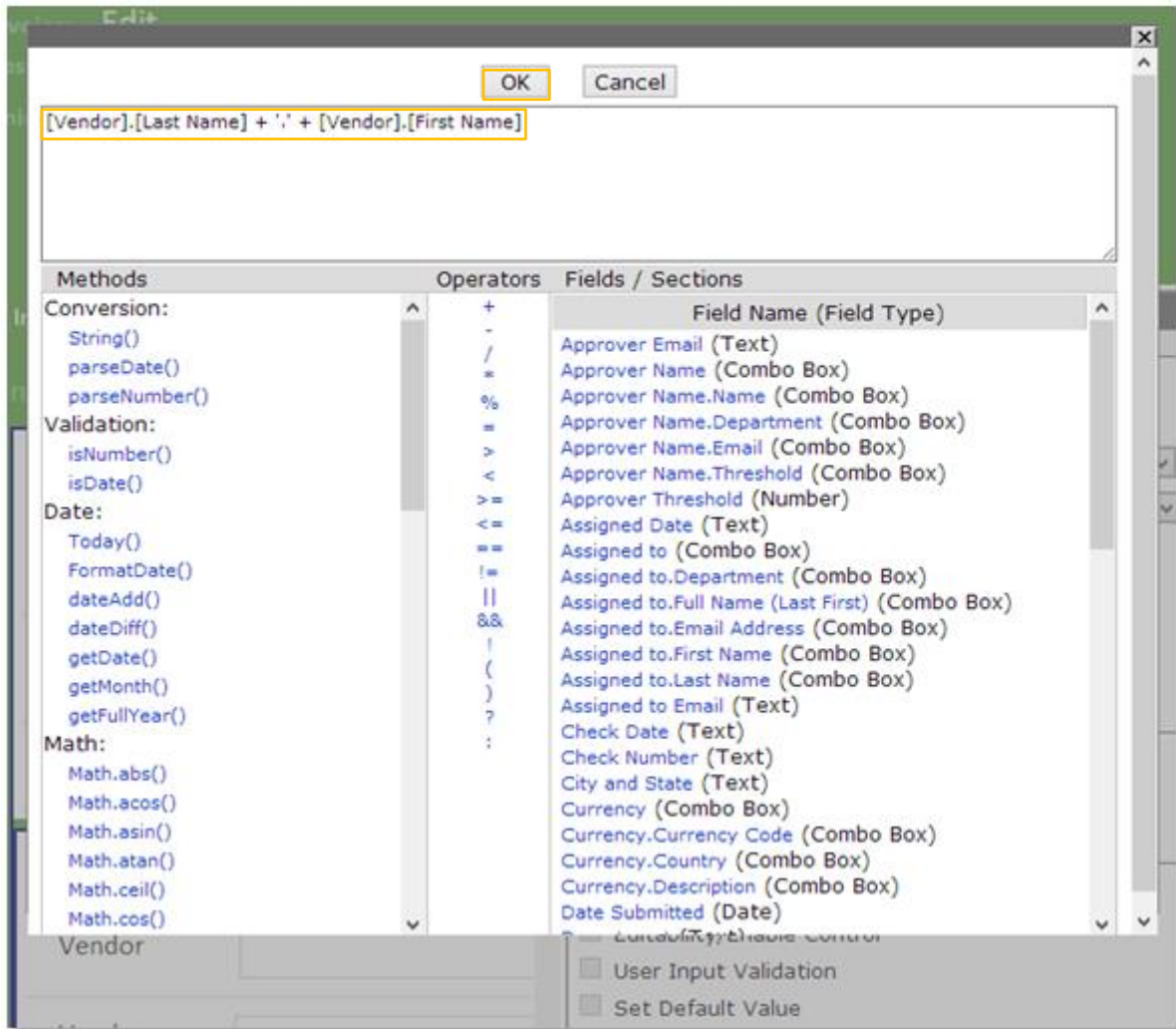


❖ Create text field Named Vendor Name



We want our app to show the vendor's information in an expanded form once a user has selected a vendor. For this we will use several text fields and populate them with vendor information.

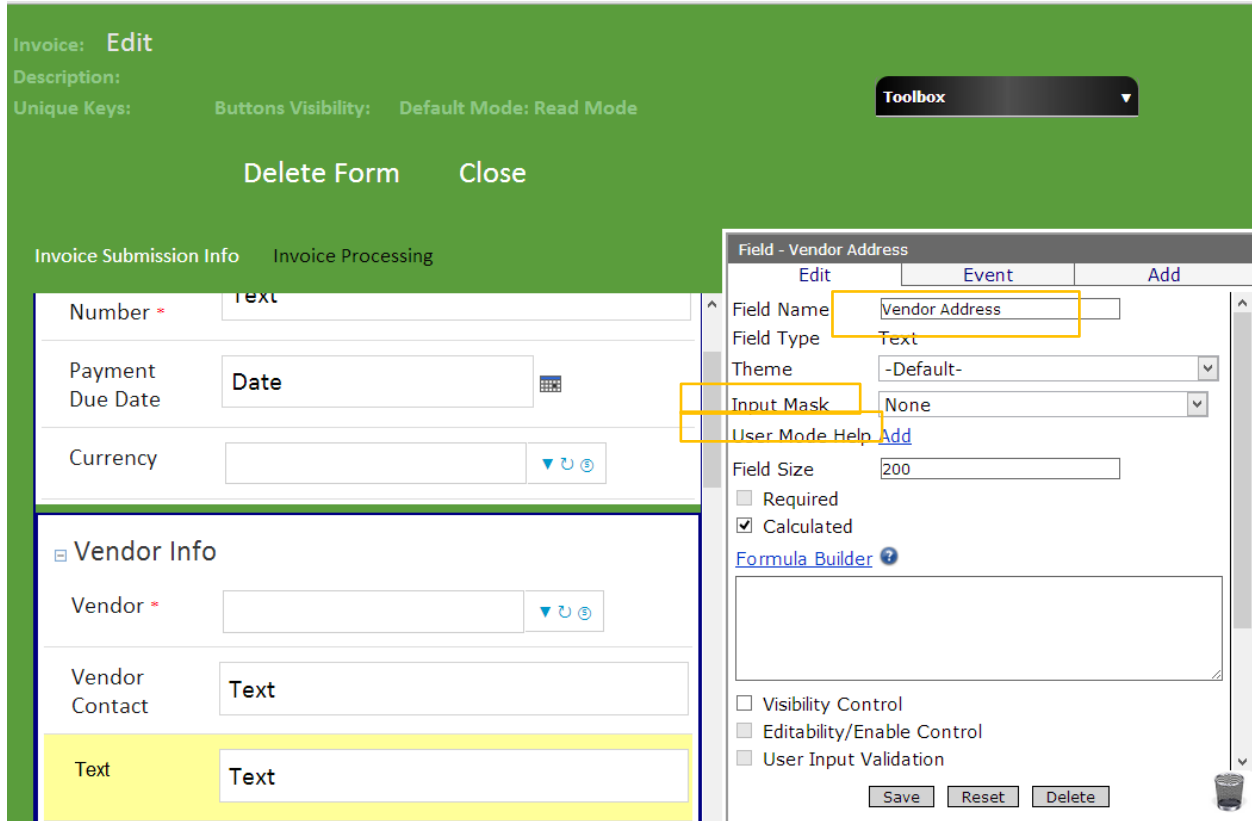
1. Drag and drop a text field into the vendor info form.
2. Name this text field Vendor Contact
3. Check *Calculated*
4. Click on Formula Builder.



5. Enter this formula:
[Vendor].[Last Name] + ', ' + [Vendor].[First Name]
6. Click Ok
7. Click Save.



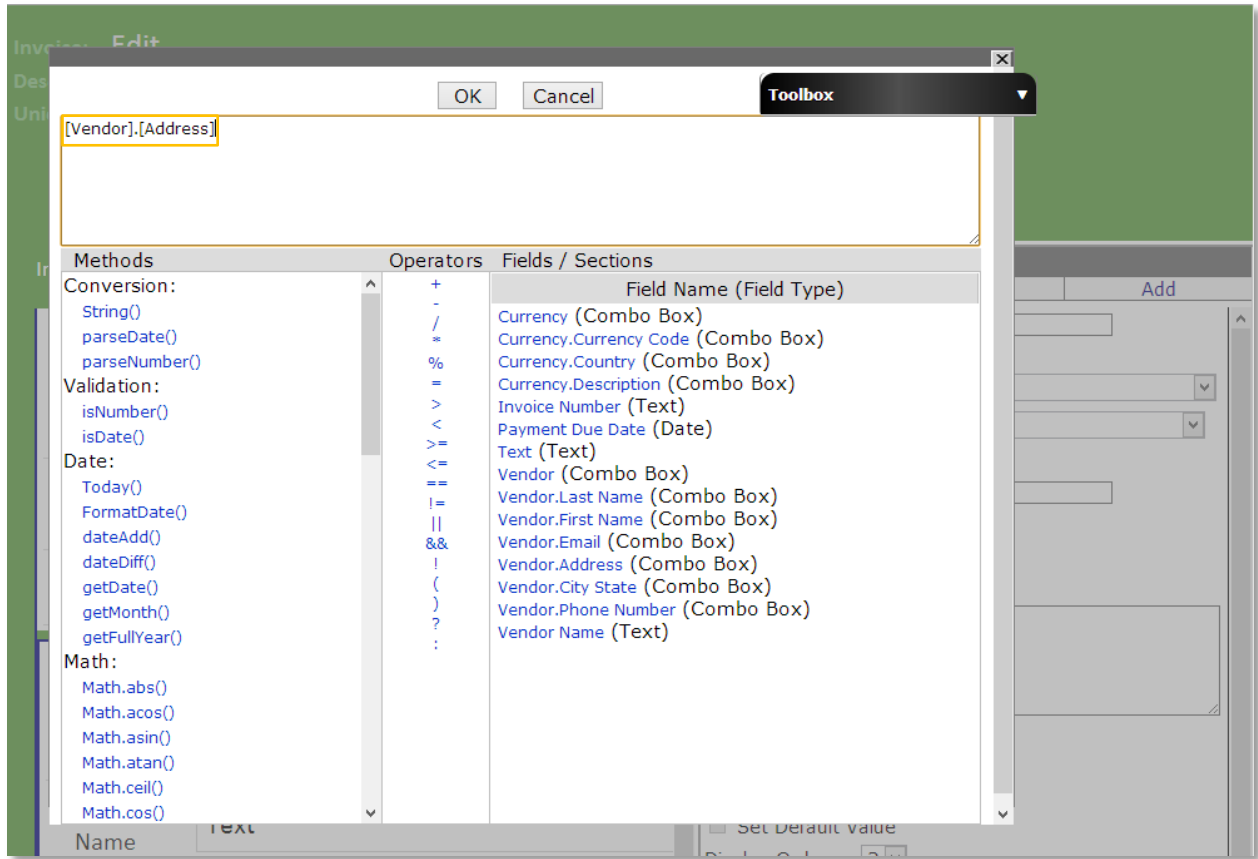
❖ Create text field Named Vendor Address



1. Drag and drop a text field into the form.
2. Name this field 'Vendor Address'
3. Check Calculated
4. Click on Formula Builder.

Key Point

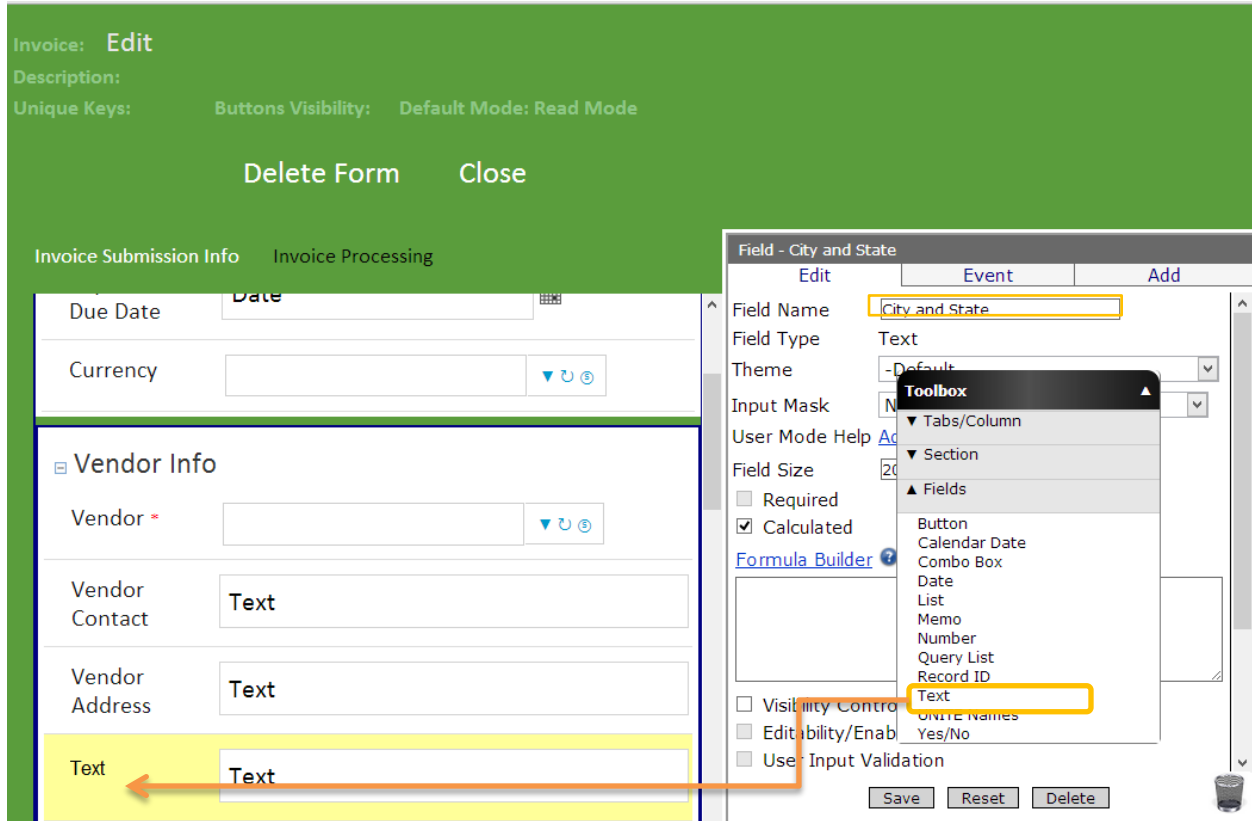
The purpose of the **formulas** we use are to create a set of instructions that your application will use to perform specific operations or to exhibit desired behaviors. Formulas are there and ready for you to use. You will only need to check the boxes next to the desired in the Properties Box, on the left hand side of your screen.



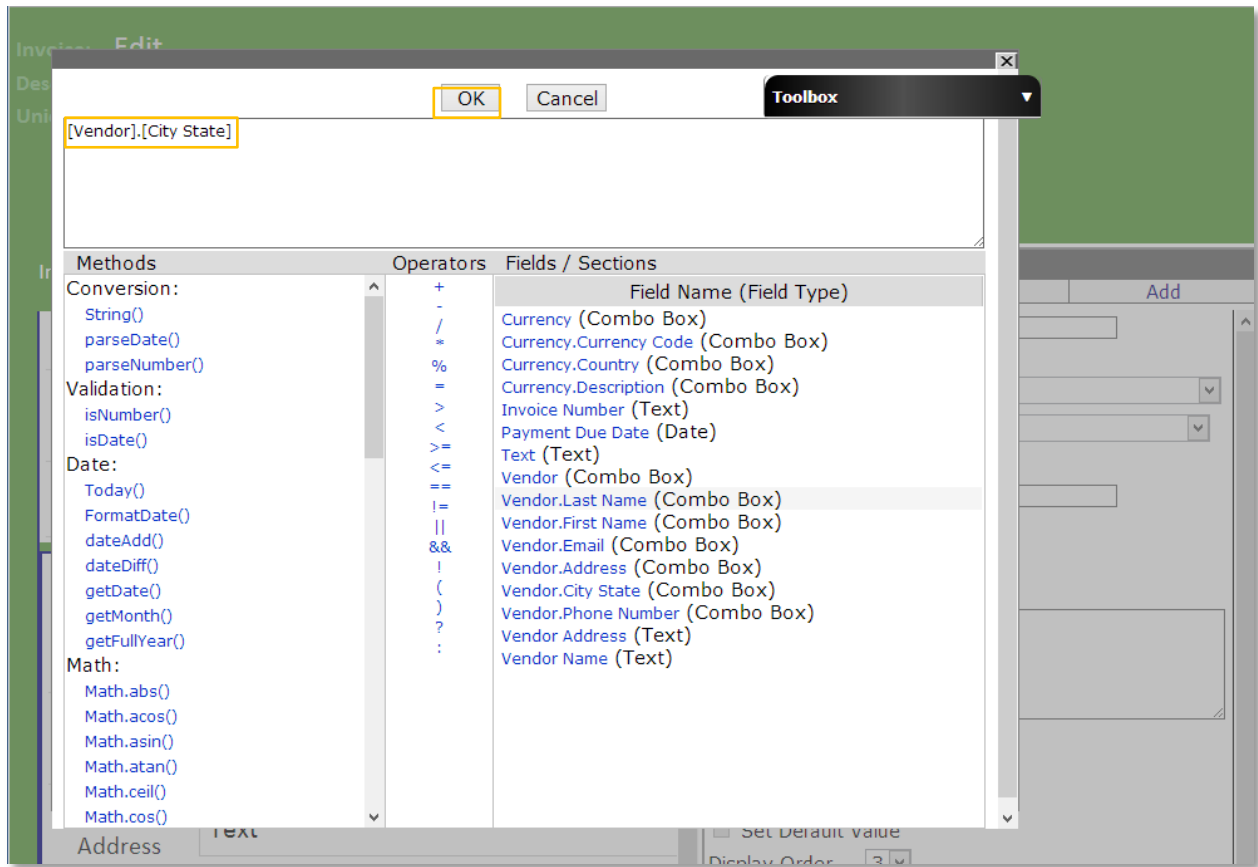
5. Enter this formula:
[Vendor].[Address]
6. Click OK
7. Click Save.



- ❖ Create text field named City and State



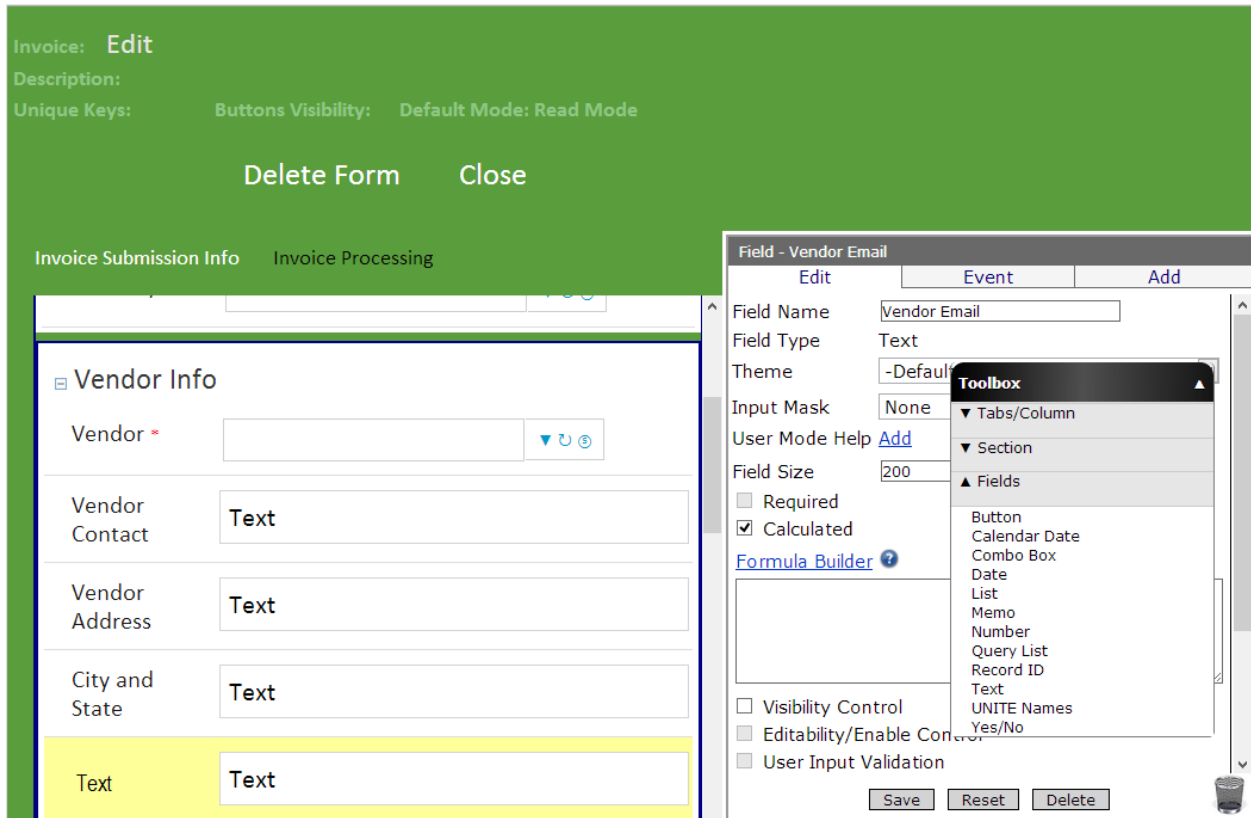
1. Drag and drop a text field into the form.
2. Name this field *City and State*
3. Check Calculated
4. Click on Formula Builder.



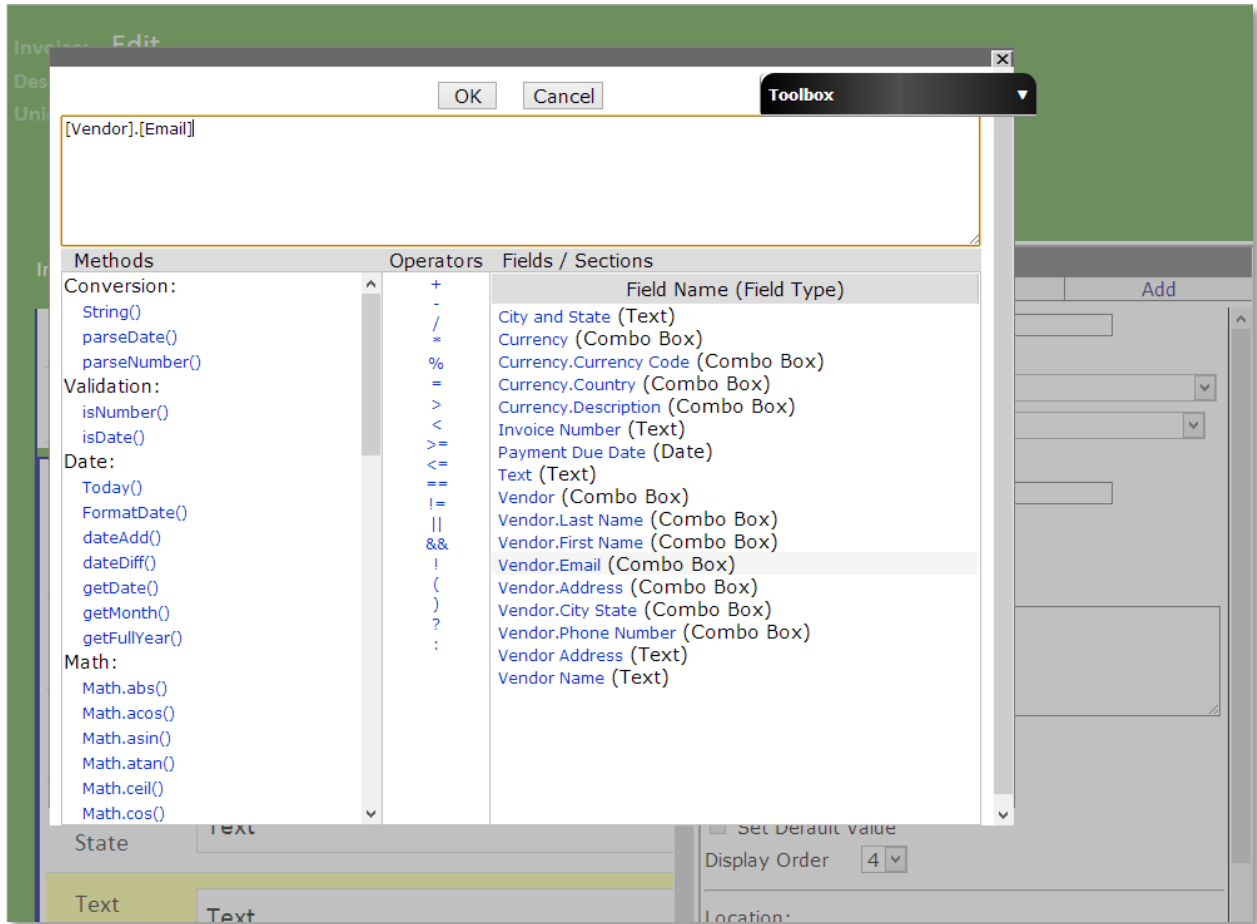
5. Enter this formula:
[Vendor].[City State]
6. Click OK
7. Click Save.



❖ Create text field named Vendor Email



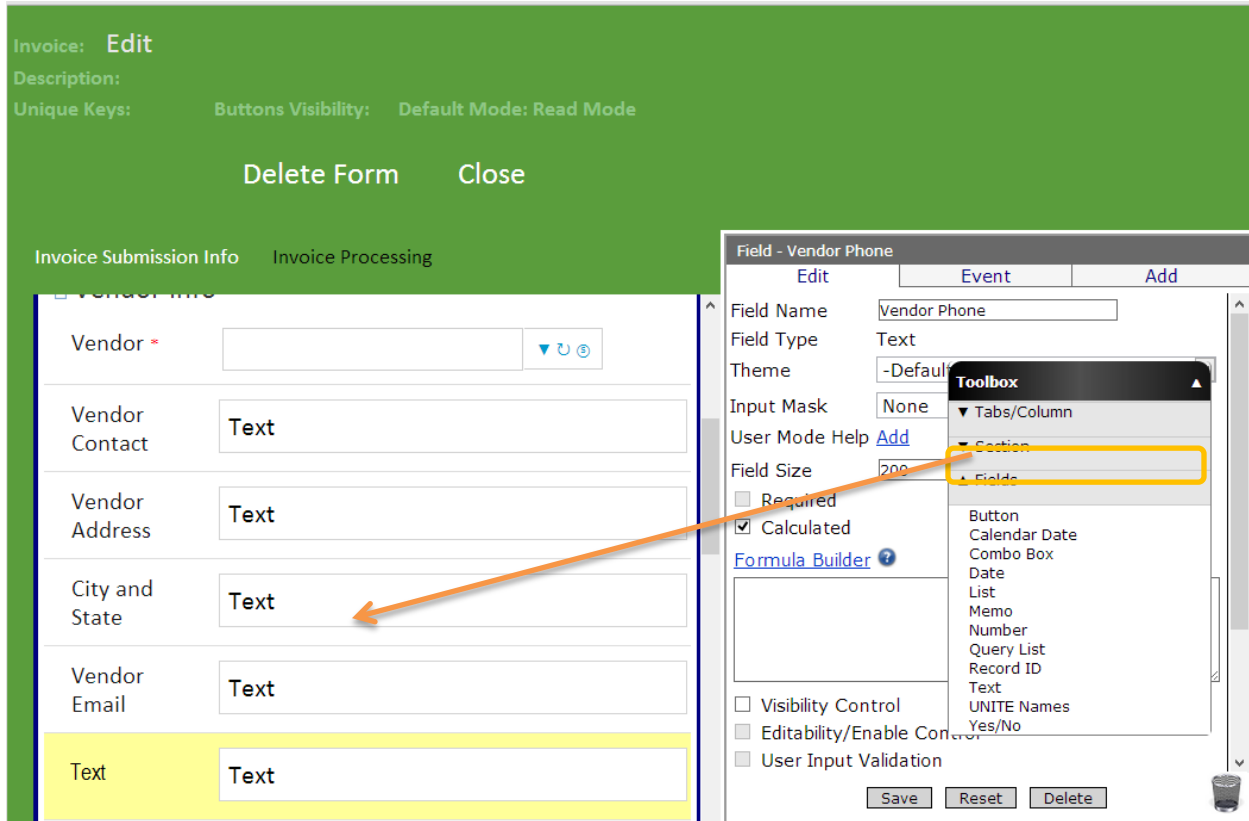
1. Drag and drop a text field into the form.
2. Name this field Vendor Email
3. Check Calculated
4. Click on Formula Builder.



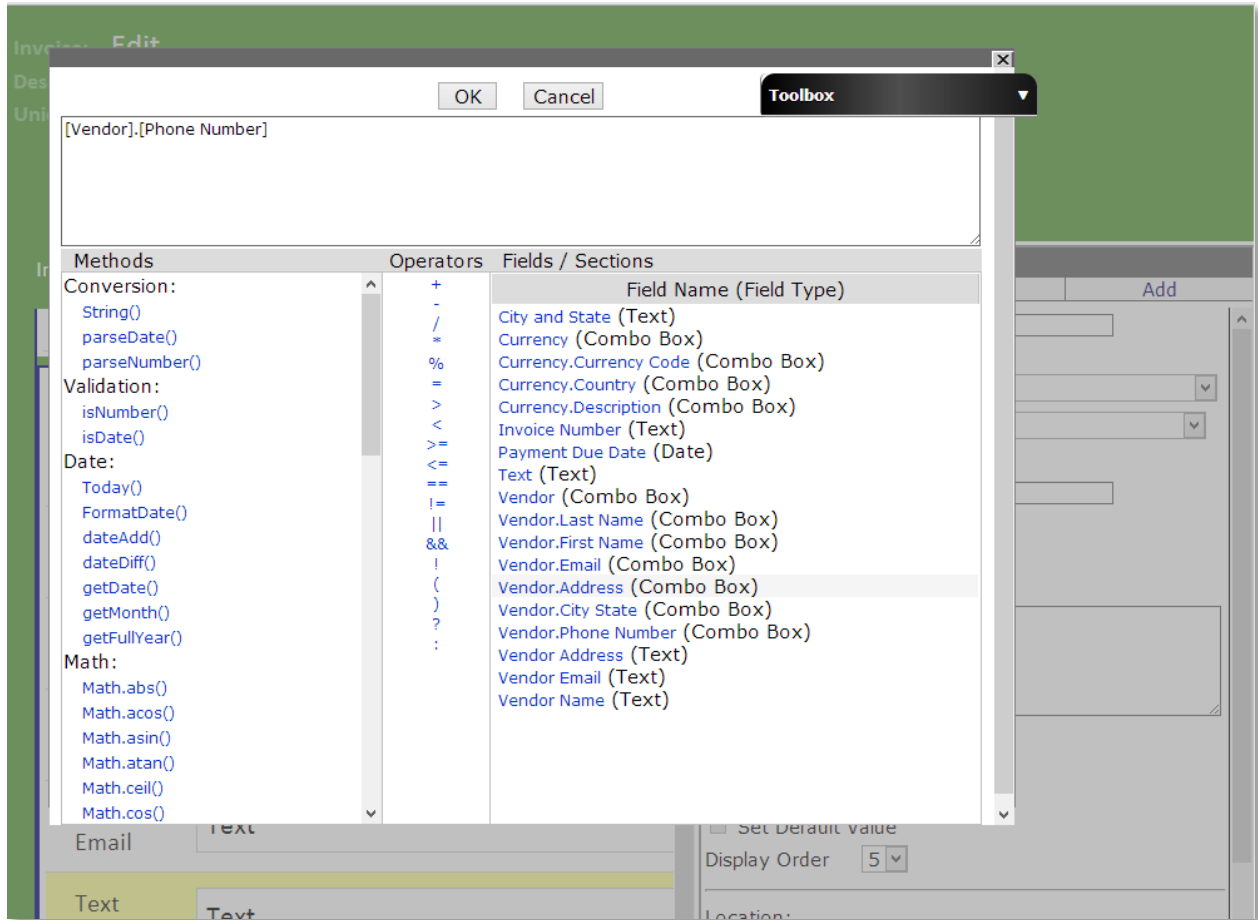
5. Enter the formula:
[Vendor].[Email]
6. Click Save.



❖ Create a text field named Vendor Phone



1. Drag and drop a text field into the form.
2. Name this field Vendor Phone
3. Check Calculated
4. Click on Formula Builder.



5. Enter this formula:
[Vendor].[Phone Number]
6. Click Save.



❖ Creating Subform Named Items

Form	Public Access Settings
Invoice	None

1. Click *Add a New Form*

Name *: Items

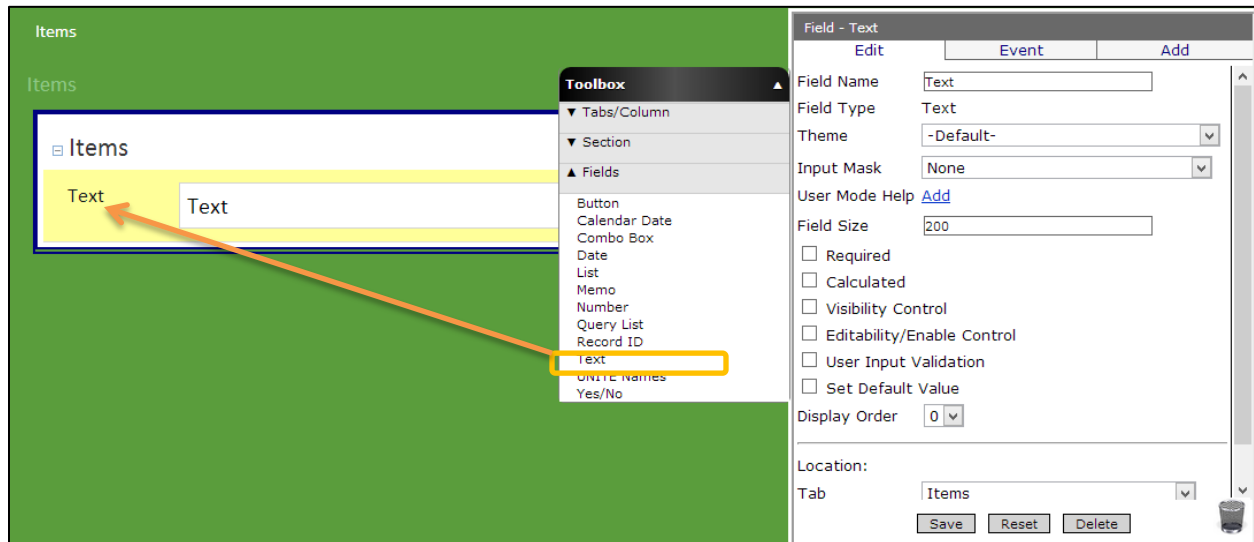
Description:

Select a Type to Copy:

2. Name this new Form Items



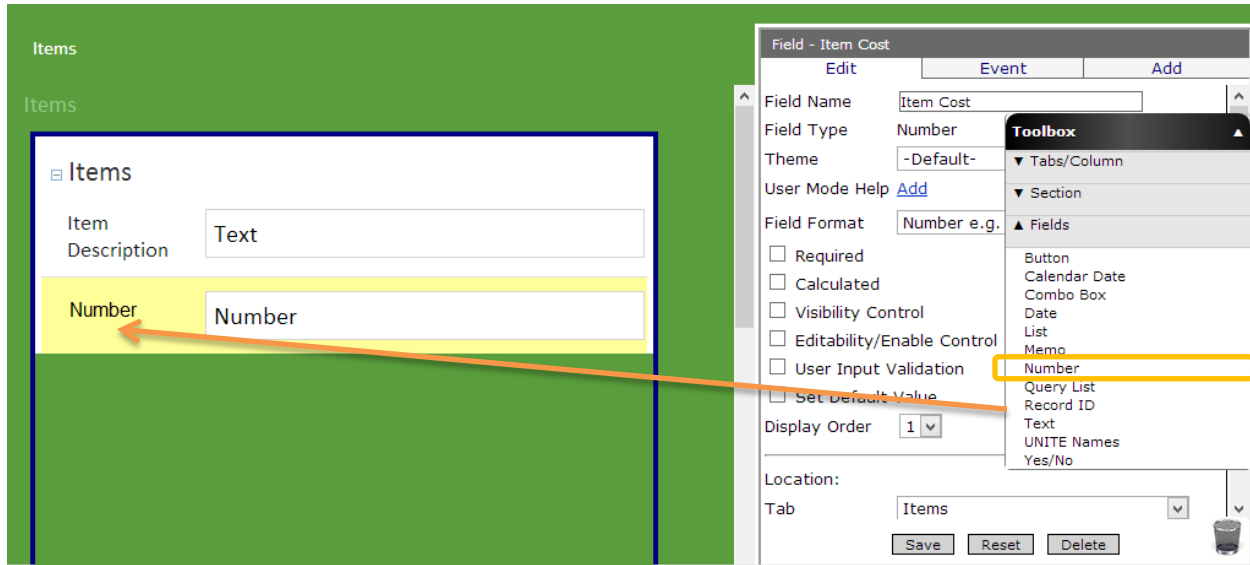
❖ Create text Field Called *Item Description*



1. Drag and drop a Text Field into the form.
2. In the Properties Box click on field name and type *Item Description*
3. Click *Save*.



❖ Create Number field named Item Cost-



✓ Drag a Number Field from the Toolbox into the form.

1. In the Properties Box click on field name and type Item Cost
2. Select Number e.g. 2,010.00 from the Field Format dropdown.
3. Click Save.



❖ Create Query List Field Named Account

The screenshot displays the WAG software interface for creating a Query List field. On the left, a form titled 'Items' contains three fields: 'Item Description' (Text), 'Item Cost' (Number), and 'Query List'. The 'Query List' field is highlighted in yellow. A 'Toolbox' is open, showing various field types, with 'Query List' highlighted in orange. The right pane shows the configuration for the 'Account' field, including a SQL query, connection string, and search/display columns.

Field - Account

Edit Event Add

Field Name: Account

Field Type: Query List

Theme: -Default-

User Mode Help: [Add](#)

[SQL Statement Builder](#)

```
SELECT
  RTRIM(LTRIM([Account])) as acct_code
  , [Description] + ' (' + RTRIM(LTRIM([Account])) + ')' as
  acct_desc
FROM [INSIGHT_ODS].[dbo].[Account]
where Active_YN = 'Y'
```

[Remap Columns](#)

External

Run at end point

Default: [v]

SQL Client ODBC OLEDB

[Connection String](#)

Driver={SQL Server}; Server=unite.corporatecentral.com; Database=Insight_ODS; Uid=crweb;

Identity Value: acct_code

Search Column: acct_desc

Display Column: acct_desc

Required

Save Reset Delete

- ✓ Drag and drop a Query List Field into the form



❖ Name the Query List

1. Name this field *Account*.
2. Enter the SQL Query that retrieves the names of accounts from our accounting system. In your case this query will be different. Consult your Accounting software manual.
3. Enter the Connection string necessary to connect to the database server.
4. Importantly, we will check the "Run at end point" option and select "Default" from the list. This will cause the query to run from our locally installed Secure EndPoint which is in the same network as the database server. Our app running from the Cloud will use this secure connection to run the query and present the results to the user in real time. This type of connection is just as secure and up to 100x faster compared to VPN type connections so our results will be presented to the user very quickly.
5. We will then set the "Identity Value" to "acct_code" which is the key field that is returned from the query. This will vary in your case.
6. The "Search Column" and "Display Column" fields will be set to "acct_desc" which is the name of the account from the chart of accounts in our accounting system. This field will also vary in your case. Paste this query into the SQL Statement box.
7. You will also need to include a connection string that provides server connection information.

Key point

Make Sure to Download the Corporate Central Secure Endpoint from the downloads section at CorporateCentral.com to establish secure connection between your WAG app and your local area network.



Field - Account

Edit Event Add

Field Name Account

Field Type Query List

Theme -Default-

User Mode Help [Add](#)

[SQL Statement Builder](#) ?

```
SELECT
  RTRIM(LTRIM([Account])) as acct_code
  ,[Description]+' ('+RTRIM(LTRIM([Account]))+') as acct_desc
FROM [INSIGHT_ODS].[dbo].[Account]
where Active_YN = 'Y'
```

[Remap Columns](#)

External

Run at end point

Default

SQL Client ODBC OLEDB

Connection String ?

```
Driver={SQL Server}; Server=sales32; Database=Insight_ODS;
U
```

Identity Value acct_code

Search Column acct_desc

Display Column acct_desc

Required

Visibility Control


Editability/Enable Control

Set Default Value

Display Order 2

Location:

Save Reset Delete





Create List Field Named Expense Type

The screenshot displays the 'Items' form and the 'Field - Expense Type' properties box. The 'List' field in the form is highlighted in yellow, and an orange arrow points from the 'List' option in the 'Toolbox' to it. The properties box shows 'Expense Type' as the field name, 'List' as the field type, and two list values: 'Corporate - Dept./Office' and 'Trust'. The 'Save' button is visible at the bottom of the properties box.

1. In the Properties Box click on Field Name and type Expense Type
2. Under List Values Enter: Corporate -Dept./Office and Trust
3. Click Save



❖ Create Query list Named Item Region.

The screenshot displays the WAG software interface. On the left, a form titled 'Items' is being designed. It contains fields for 'Item Description' (Text), 'Item Cost' (Number), 'Account', and 'Expense Type'. A 'Query List' field is highlighted in yellow, and an orange arrow points to it from the 'Toolbox'. The 'Toolbox' is open, showing a list of field types under the 'Fields' section, with 'Query List' selected and highlighted in yellow. On the right, the 'Field - Item Region' configuration window is open. It shows the following settings:

- Field Name: Item Region
- Field Type: Query List
- Theme: -Default-
- User Mode Help: Add
- SQL Statement Builder: `select distinct region=trim([Region]) from tblUsers_unite where trim([Region])<>"`
- Remap Columns: External, Run at end point, Default
- SQL Client: ODBC
- Connection String: `Driver={SQL Server}; Server=sales32.spc.dev; Database=cp_Authorization; Uid=crweb;`
- Identity Value: Region
- Search Column: Region
- Display Column: Region
- Required:
- Visibility Control:

Buttons for 'Save', 'Reset', and 'Delete' are visible at the bottom of the configuration window.

✓ Drag and drop a Query List Field into the form



- ❖ Name the Query List as shown on the screenshot on the next page
- 1. Name this field as *Item Region*
- 2. Enter the SQL Query that retrieves the names of Regions from our accounting system. In your case this query will be different. Consult your Accounting software manual.
- 3. Enter the Connection string necessary to connect to the database server.
- 4. Importantly, we will check the "Run at end point" option and select "Default" from the list. This will cause the query to run from our locally installed Secure EndPoint which is in the same network as the database server. Our app running from the Cloud will use this secure connection to run the query and present the results to the user in real time. This type of connection is just as secure and up to 100x faster compared to VPN type connections so our results will be presented to the user very quickly.
- 5. We will then set the **Identity Value, Search Column and Display Column** as Region which is the key field that is returned from the query. This will vary in your case. It is the name of the account from the chart of accounts in our accounting system. This field will also vary in your case. Paste this query into the SQL Statement box.
- 6. You will also need to include a connection string that provides server connection information.
- 7. Our form will contain three Query Lists: Expense Type, Item Region and Item Department.
- 8. If the Expense Type is a specific brand – such as "Corporate Office" we have to option to display to other forms to further categorize each item.
- 9. This is accomplished by changing the Visibility control on Item Region and Item Department to be dependent on the choice in Expense Type.
- 10. Click Item Region in the form
- 11. Check Visibility Control
- 12. Click Formula Builder
- 13. Enter this formula:

[Expense Type]== 'Corporate -Dept. /Office'

- 14. Click Save



Field - Item Region

[Edit](#) [Event](#) [Add](#)

Field Name

Field Type

Theme

User Mode Help [Add](#)

[SQL Statement Builder](#) ?

```
select distinct Region=rtrim([Region]) from tblUsers_unite where  
rtrim([Region])<>"
```

[Remap Columns](#)

External

Run at end point

SQL Client ODBC OLEDB

Connection String ?

```
Driver={SQL Server}; Server=sales32.spc.dev;  
Database=cp_Authorization;
```

Identity Value

Search Column

Display Column

Required

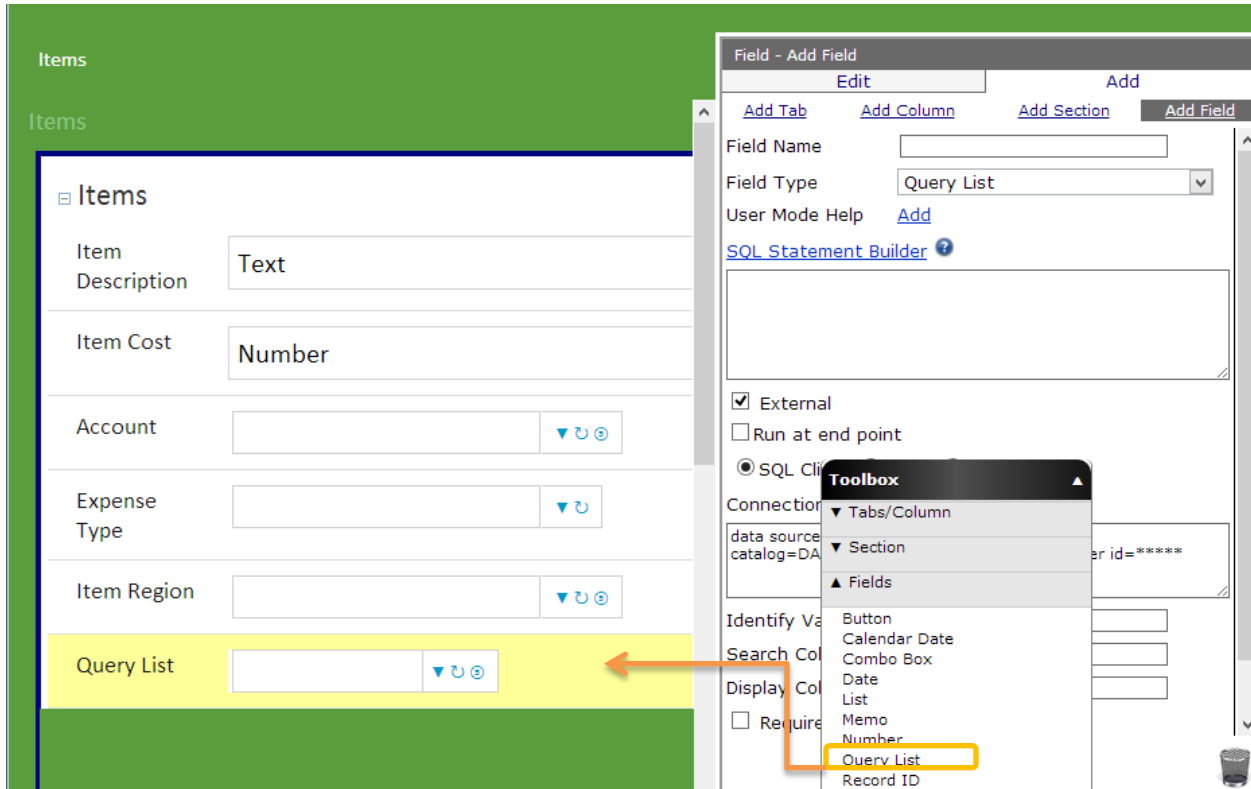
Visibility Control

[Formula Builder](#) ?

```
[Expense Type]== 'Corporate - Dept./Office'
```



Create Query List Named Item Department.



- ✓ Drag and Drop a query list field from the toolbox beneath the Account field.



❖ Name the Query list as shown on the screenshot of the next page.

1. Name this field as *Item Department*
2. Enter the SQL Query that retrieves the names of Regions from our accounting system. In your case this query will be different. Consult your Accounting software manual.
3. Enter the Connection string necessary to connect to the database server.
4. Importantly, we will check the "Run at end point" option and select "Default" from the list. This will cause the query to run from our locally installed Secure EndPoint which is in the same network as the database server. Our app running from the Cloud will use this secure connection to run the query and present the results to the user in real time. This type of connection is just as secure and up to 100x faster compared to VPN type connections so our results will be presented to the user very quickly.
5. We will then set the **Identity Value, Search Column and Display Column** as Department which is the key field that is returned from the query. This will vary in your case. It is the name of the account from the chart of accounts in our accounting system. This field will also vary in your case. Paste this query into the SQL Statement box.
6. You will also need to include a connection string that provides server connection information.
7. Our form will contain three Query Lists: Expense Type, Item Region and Item Department.
8. If the Expense Type is a specific brand – such as "Corporate Office" we have to option to display to other forms to further categorize each item.
9. This is accomplished by changing the Visibility control on Item Region and Item Department to be dependent on the choice in Expense Type.
10. Click Item Region in the form
11. Check Visibility Control
12. Click Formula Builder
13. Enter this formula:
$$[Expense\ Type]=='Corporate - Dept./Office'$$
14. Click Save
15. Click Close.
16. Click Invoice



Field - Item Department

[Edit](#) [Event](#) [Add](#)

Field Name

Field Type

Theme

User Mode Help [Add](#)

[SQL Statement Builder](#) ?

```
select rtrim([Cost Center]) As Department from tblUsers_unite
where rtrim([Cost Center])<>"
union
select rtrim([Office]) As Department from tblUsers_unite where
rtrim([Office])<>"
```

[Remap Columns](#)

External

Run at end point

SQL Client ODBC OLEDB

Connection String ?

```
Driver={SQL Server}; Server=sales32;
Database=cp_Authorization; Uid=uid;
```

Identity Value

Search Column

Display Column

Required

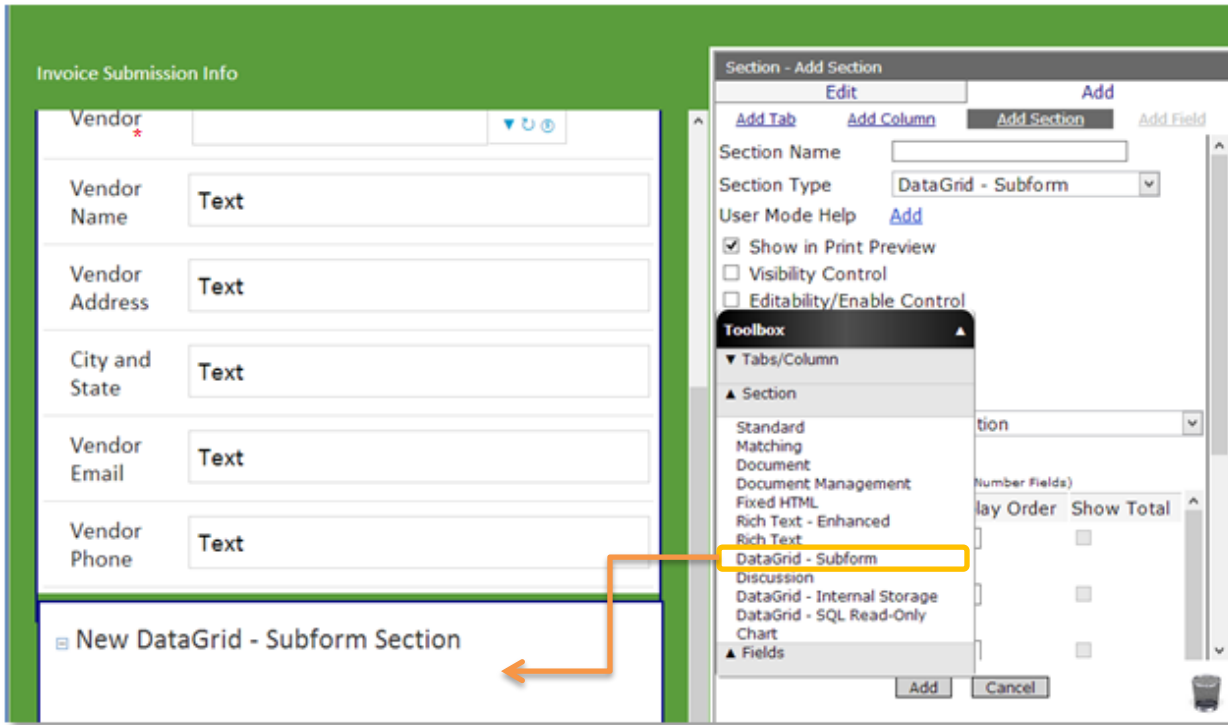
Visibility Control

[Formula Builder](#) ?

```
[Expense Type]='Corporate - Dept./Office'
```



❖ Create DataGrid Subform named Items



Finishing the Subform

1. Click on "Forms"
2. Click on "Invoice"
3. Drag a DataGrid-Subform from the Toolbox. Drop it beneath the
4. Invoice Section.



Section - Items

[Edit](#) [Add](#)

Section Name

Display Order

Theme

Section Type

User Mode Help [Add](#)

Show in Print Preview

Visibility Control

Editability/Enable Control

Criteria Based

Allow Add New Records

Allow Link Records

Page Size

System

Form

Fields (Show Total only applies on Number Fields)

Field	Display Order	Show Total
<input checked="" type="checkbox"/> Account	<input type="text" value="1"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Expense Type	<input type="text" value="4"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Item Cost	<input type="text" value="2"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Item Department	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Item Description	<input type="text" value="3"/>	<input type="checkbox"/>
<input type="checkbox"/> Item Region	<input type="text"/>	<input type="checkbox"/>

❖ Name the DataGrid Subform

1. In the Properties Box Click in Section Name and type *Items*

2. Check *Allow Add New Records*

3. Select *Items* from the Type dropdown menu.

4. Check "Account", "Expense Type", "Item Cost", and "Item Description",

5. Give Account a Display Order as shown on the screenshot

6. Check Show Total next to Item Cost

7. Click Add



- ❖ Create a Number field named Invoice Total

Invoice: Show Advanced Options
Description:
Unique Keys: Buttons Visibility: Default Mode: Read Mode

Delete Form Close

Invoice Submission Info Invoice Processing

Line Items

Account	Expense Type	Item Cost
Number	Number	

Field - Number

Edit Event Add

Field Name: Number
Field Type: Number
Theme: -Default-
User Mode Help: Add
Field Format: General e.g. 201

Required
 Show Scanner
 Calculated
 Visibility Control
 Editability/Enable Control
 User Input Validation
 Set Default Value

Display Order: 0

Location:

Save Reset

Toolbox

- ▼ Tabs/Columns
- ▼ Section
- ▲ Fields
 - Button
 - Calendar Date
 - Combo Box
 - Date
 - List
 - Memo
 - Number
 - Query List
 - Record ID
 - Text
 - UNITE Names
 - Yes/No

- ✓ Drag and drop a Number field from the Toolbox into the Line Items subform



❖ Name the Number field

The screenshot shows the WAG software interface with a form configuration window open. The main window has a green header with the text "Invoice: Show Advanced Options" and "Description:". Below the header are buttons for "Delete Form" and "Close". The form configuration window, titled "Field - Number", has tabs for "Edit", "Event", and "Add". The "Edit" tab is active, showing the following settings:

- Field Name: Invoice Total
- Field Type: Number
- Theme: -Default-
- User Mode Help: Add
- Field Format: General e.g. 2010
- Required
- Show Scanner
- Calculated
- Formula Builder (with a help icon)
- Automatically parse all field values to number type

At the bottom of the configuration window are buttons for "Save", "Reset", and "Delete".

1. In the Properties box click on field Name and type "Invoice Total"
2. Field Format should be currency
3. Check Calculated



Invoice: Show Advanced Options

Description: Button

Unique Keys: Delete

Invoice Submission Info

Vendor Address Text

City and State Text

Vendor Phone Text

Line Items

Account Expense

Number Number

[Line Items].Total[Item Cost]

OK Cancel

Toolbox

Methods	Operators	Fields / Sections
Conversion:	+	Project Manager.Department (Combo Box)
String()	-	Project Manager.Email Address (Combo Box)
parseDate()	/	Project Manager.Full Name (Last First) (Combo Box)
parseNumber()	=	Project Manager.Office (Combo Box)
Validation:	%	Project Manager.Region (Combo Box)
isNumber()	=	Project Manager.Region Reviewed (Text)
isDate()	>	Region (Text)
Date:	<	Rejected Date (Text)
Today()	>=	Rejected Email Body (Text)
FormatDate()	<=	Rejected Reason (Text)
dateAdd()	==	Vendor (Combo Box)
dateDiff()	!=	Vendor.Address (Combo Box)
getDate()		Vendor.City State (Combo Box)
getMonth()	&&	Vendor.Email (Combo Box)
getFullYear()	!	Vendor.First Name (Combo Box)
Math:	(Vendor.Last Name (Combo Box)
Math.abs())	Vendor.Phone Number (Combo Box)
Math.acos()	?	Vendor.Vendor Company Name (Combo Box)
Math.asin()	:	Vendor Address (Text)
Math.atan()	:	Vendor Contact (Text)
Math.ceil()	:	Vendor Email (Text)
Math.cos()	:	Vendor Phone (Text)
Math.exp()	:	
		Subform Sections
		Line Items.Count
		Line Items.Total[FieldName]

4. Click Formula Builder and enter the following formula:
[Line Items].Total[Item Cost]
5. Click Save



Invoice: Show Advanced Options
Description:
Unique Keys: Buttons Visibility: Default Mode: Read Mode

Delete Form Close

Invoice Submission Info Invoice Processing

City and State	Text
Vendor Phone	Text

Line Items

Account	Expense Type	Item Cost
Invoice Total		Number

Standard

Click here to Add Fields

Section - Standard

Edit Add

Section Name Standard

Display Order 3

Theme -Default

Section Type Standard

User Mode Help Add

Show in Print Preview

Visibility Control

Editability/Enable C

Location:

Tab Invoice

Column Invoice

Save Reset Delete

Toolbox

- ▼ Tabs/Columns
- ▲ Section
 - Standard
 - Matching
 - Document Management
 - Fixed HTML
 - Rich Text - Enhanced
 - DataGrid - Subform
 - Discussion
 - DataGrid - Internal Storage
 - DataGrid - SQL Read-Only
 - Chart
- ▼ Fields

Adding a Processing Section

Our application will have several different people working with it. In order to better organize workflow, we will use several text fields that will contain flags concerning which stage an invoice is in. Because these flags do not directly pertain to the invoice itself, they will be hidden. Only our buttons and internal logic will examine them.



- ❖ Create new Section Called Processing

The screenshot shows a form editor interface with a green header bar containing 'Delete Form' and 'Close' buttons, and a 'Toolbox' dropdown menu. The main form area is titled 'Invoice Submission Info' and 'Invoice Processing'. It contains several fields: 'City and State' (Text), 'Vendor Phone' (Text), 'Line Items' (a table with columns 'Account', 'Expense Type', and 'Item Cost'), and 'Invoice Total' (Number). A 'Standard' section is being added to the form, and a 'Click here to Add Fields' link is visible below it. A 'Section - Standard' dialog box is open, showing the configuration for the new section. The dialog has 'Edit' and 'Add' tabs. The 'Section Name' is 'Processing', 'Display Order' is '3', 'Theme' is '-Default-', and 'Section Type' is 'Standard'. There are checkboxes for 'Show in Print Preview' and 'Visibility Control', both of which are checked. A 'Formula Builder' link is also present. The 'Location' field is set to 'Invoice Submission Info'. At the bottom of the dialog are 'Save', 'Reset', and 'Delete' buttons.

- ✓ Drag and drop a Standard Section into our form.
 1. Name this section "Processing"
 2. Check Visibility Control. Make sure the box underneath it says, false



❖ Create Text Field Named Email Body

The screenshot displays the WAG software interface for creating a form. At the top, there are buttons for "Delete Form" and "Close". Below this, the form is divided into sections: "Invoice Submission Info" and "Invoice Processing".

The "Invoice Submission Info" section contains:

- City and State: Text field
- Vendor Phone: Text field

The "Invoice Processing" section contains:

- Line Items: A table with columns "Account", "Expense Type", and "Item Cost".
- Invoice Total: Number field
- Processing: A section containing two text fields, highlighted in yellow.

On the right side, a "Field - Text" configuration panel is open. It shows the following settings:

- Field Name: Text
- Field Type: Text
- Theme: -Default-
- Input Mask: None
- User Mode Help: Add
- Field Size: 200
- Options: Required, Show Scanner, Calculated, Visibility Control, Editability/Enable Contr, User Input Validation, Set Default Value (all unchecked).
- Display Order: 0
- Location: (empty)

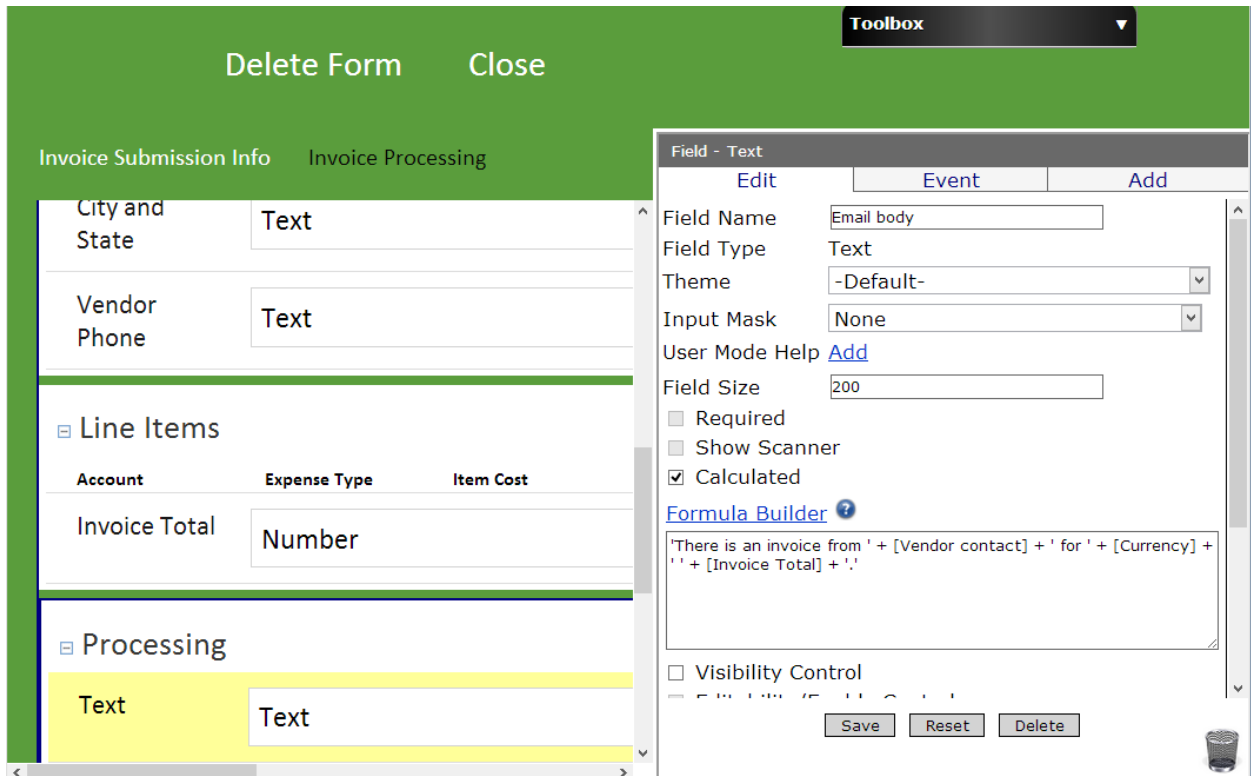
A "Toolbox" is also visible, listing various field types. The "Text" field type is highlighted with a yellow box, and an orange arrow points from it to the "Processing" section of the form.

Buttons for "Save", "Reset", and "Delete" are located at the bottom of the configuration panel.

- ✓ Drag and drop a text field into the Processing Section.



- ❖ Name the text field



Email Body

During the course of invoice processing we will email people regarding details about the invoice. We will use a text field to set up this email automatically without users having to worry about constructing each email.

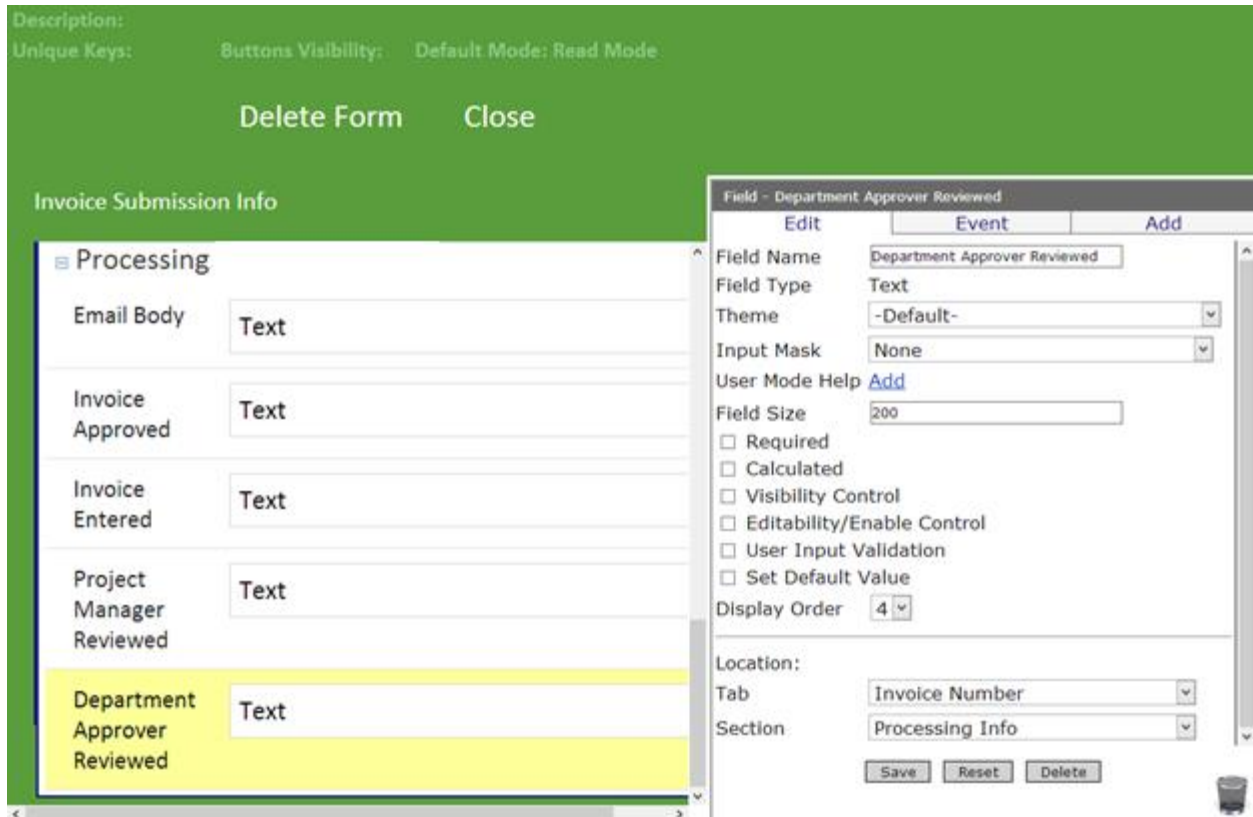
1. Name this field "Email Body"
2. Check Calculated
3. Click Formula Builder and enter the following formula:

'There is an invoice from ' + [Vendor contact] + ' for ' + [Currency] + ' + [Invoice Total] + '.'

4. Click Save.



- ✓ Create text Fields Called Invoice Entered, Project Manager, department approver reviews, invoice approved



Flags

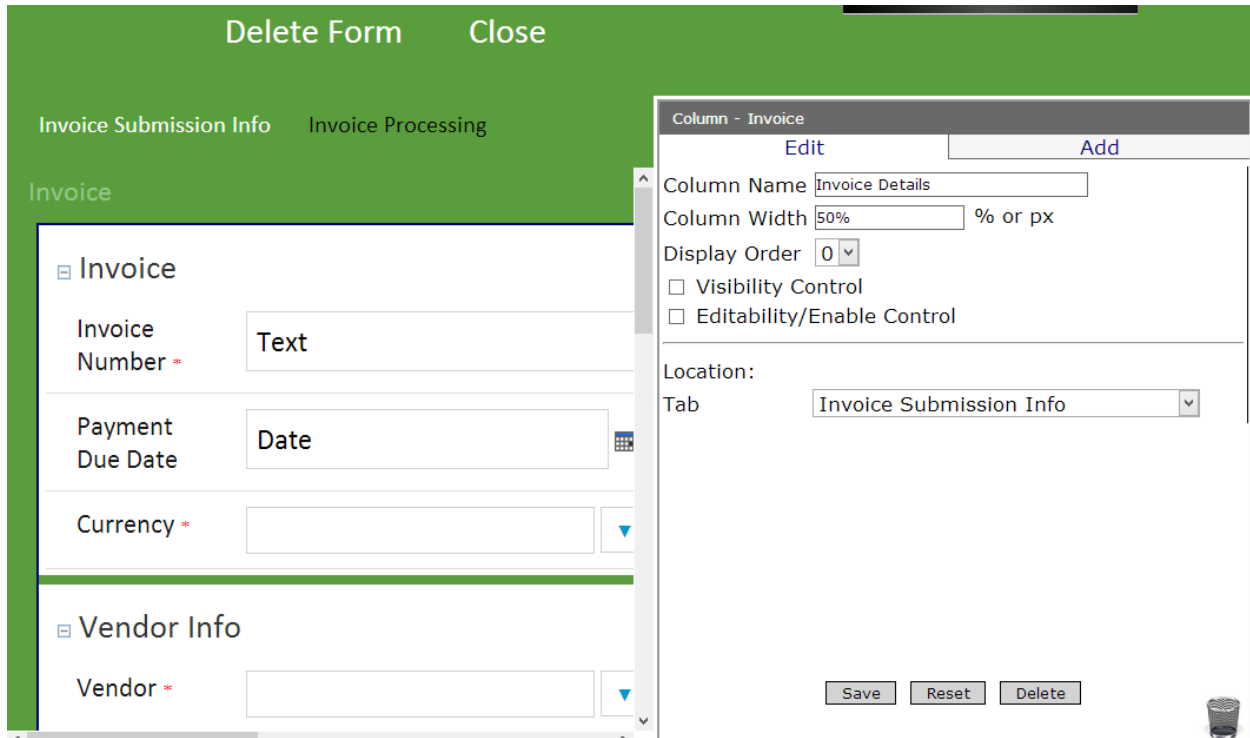
Our app will use some logic to determine which fields to show a user. The following fields will hold data regarding what has happened so far in the invoice processing.

1. Drag and drop a Text field into the Processing Section.
2. Name this field "Invoice Approved" Click Save.
3. Drag and drop a Text field into the Processing Section.
4. Name this field "Invoice Entered" and Click Save.
5. Drag and drop a Text field into the Processing Section.
6. Name this field "Project Manager Reviewed" and Click Save.
7. Drag and drop a Text field into the Processing Section.



8. Name this field "Department Approver Reviewed" and Click Save.

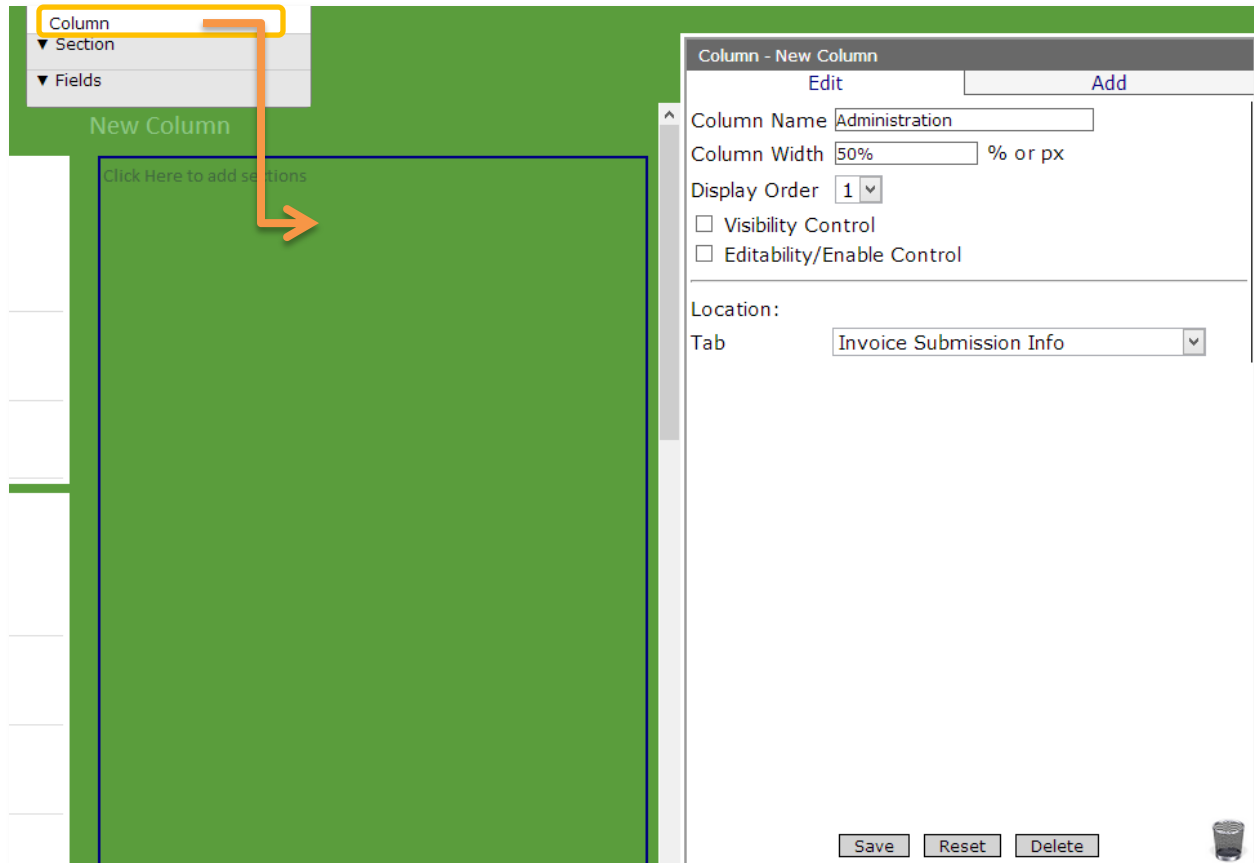
❖ Rename the Column Invoice to Invoice Details



1. On the properties box click in Column Name and Type Invoice Details
2. In the Column width type 50%
3. Click Save



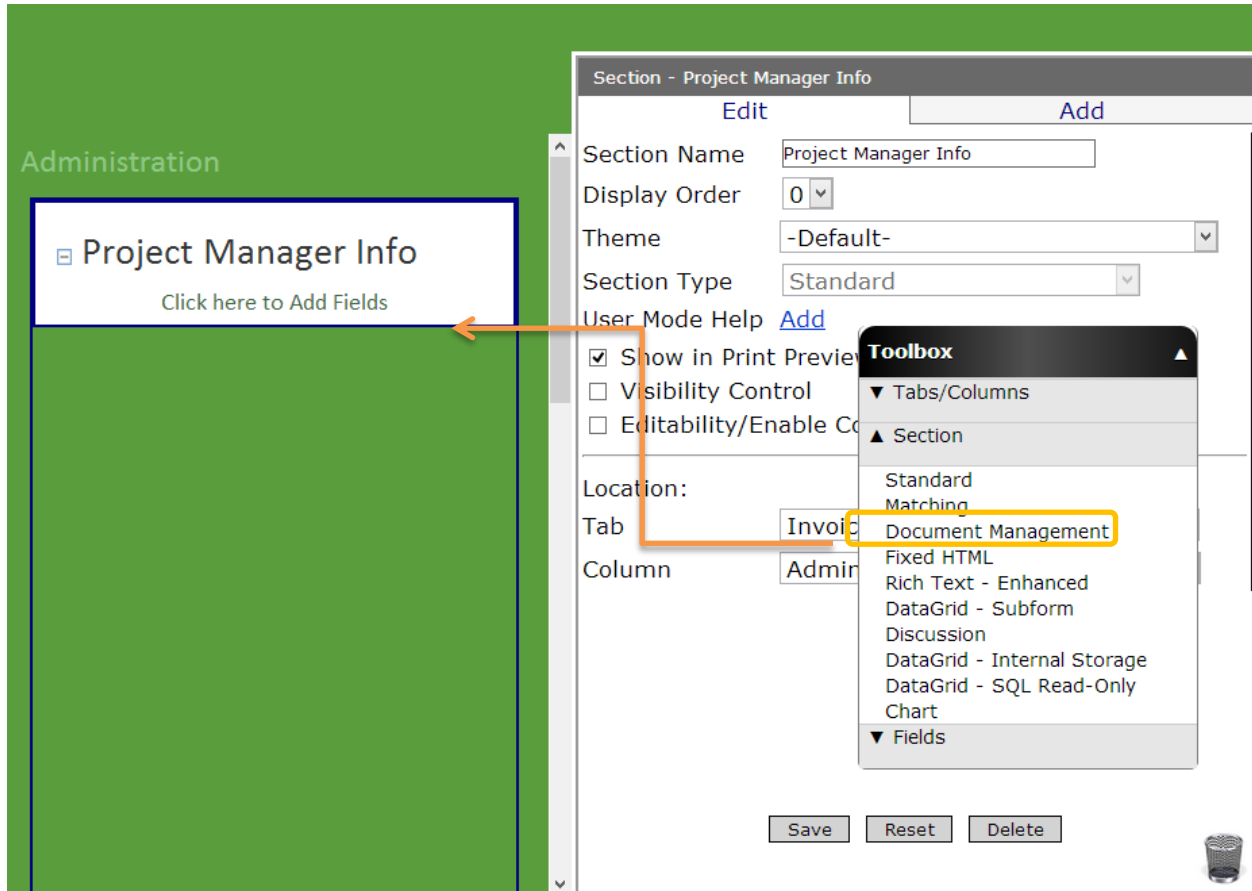
❖ Create New Column Named Administration



1. Drag and drop a new column from the Tabs/Column Section of the Toolbox.
2. In the Properties Box click on Column Name and type Administration.
3. Click Save



- ❖ Create a new Section named Project Manager.

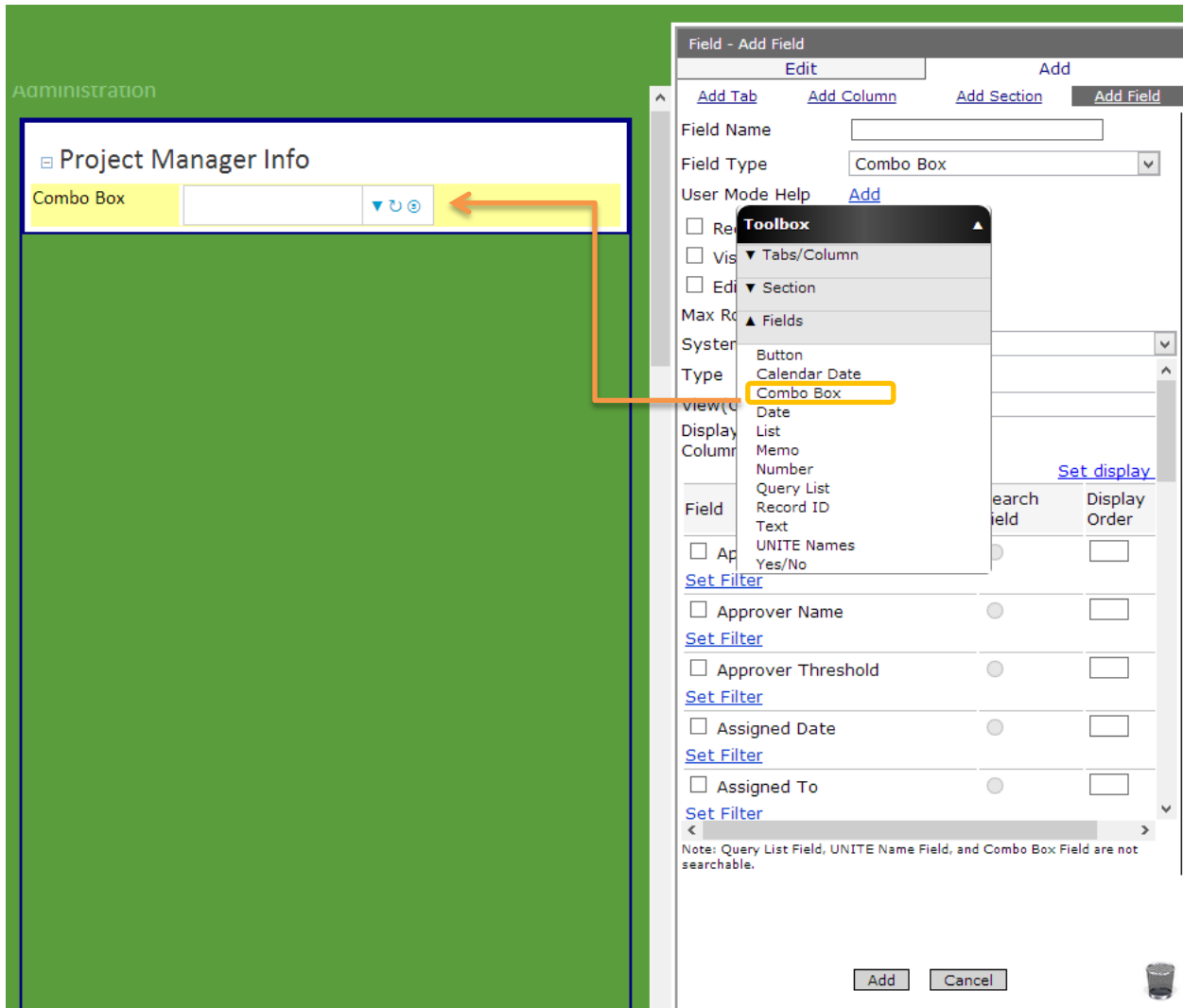


Creating the Manager Section

4. Drag and drop a new Section into the Form.
5. In the Properties Box click on Section Name and type *Project Manager Info*.
6. Click Save.



❖ Create a combo box named Project Manager



1. Drag and drop a Combo Box into the Project Manager section.
2. In the Properties Box click on Field Name and type Project Manager

We will populate this combo box by utilizing the contact data already stored in Total Relationship Management™. Your application could use TRM, another WAG app or even a Query List.



Field - Project Manager

Edit Event Add

Field Name

Field Type Combo Box

Theme

User Mode Help [Add](#)

Required

Visibility Control

Editability/Enable Control

Set Default Value

Display Order

Max Rows

System

VE

Object

Type Any

[Edit](#)

Display Column

[Set display order](#)

Field	Search Field	Display Order
<input checked="" type="checkbox"/> Department Set Filter	<input type="radio"/>	<input type="text" value="3"/>
<input type="checkbox"/> Direct Set Filter	<input type="radio"/>	<input type="text"/>
<input type="checkbox"/> Direct Fax Set Filter	<input type="radio"/>	<input type="text"/>
<input checked="" type="checkbox"/> Email Address Set Filter	<input type="radio"/>	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Full Name (Last First) Set Filter	<input checked="" type="radio"/>	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Office Set Filter	<input type="radio"/>	<input type="text" value="4"/>
<input checked="" type="checkbox"/> Region Set Filter	<input type="radio"/>	<input type="text" value="5"/>

Note: Query List Field, UNITE Name Field, and Combo Box Field are not searchable.

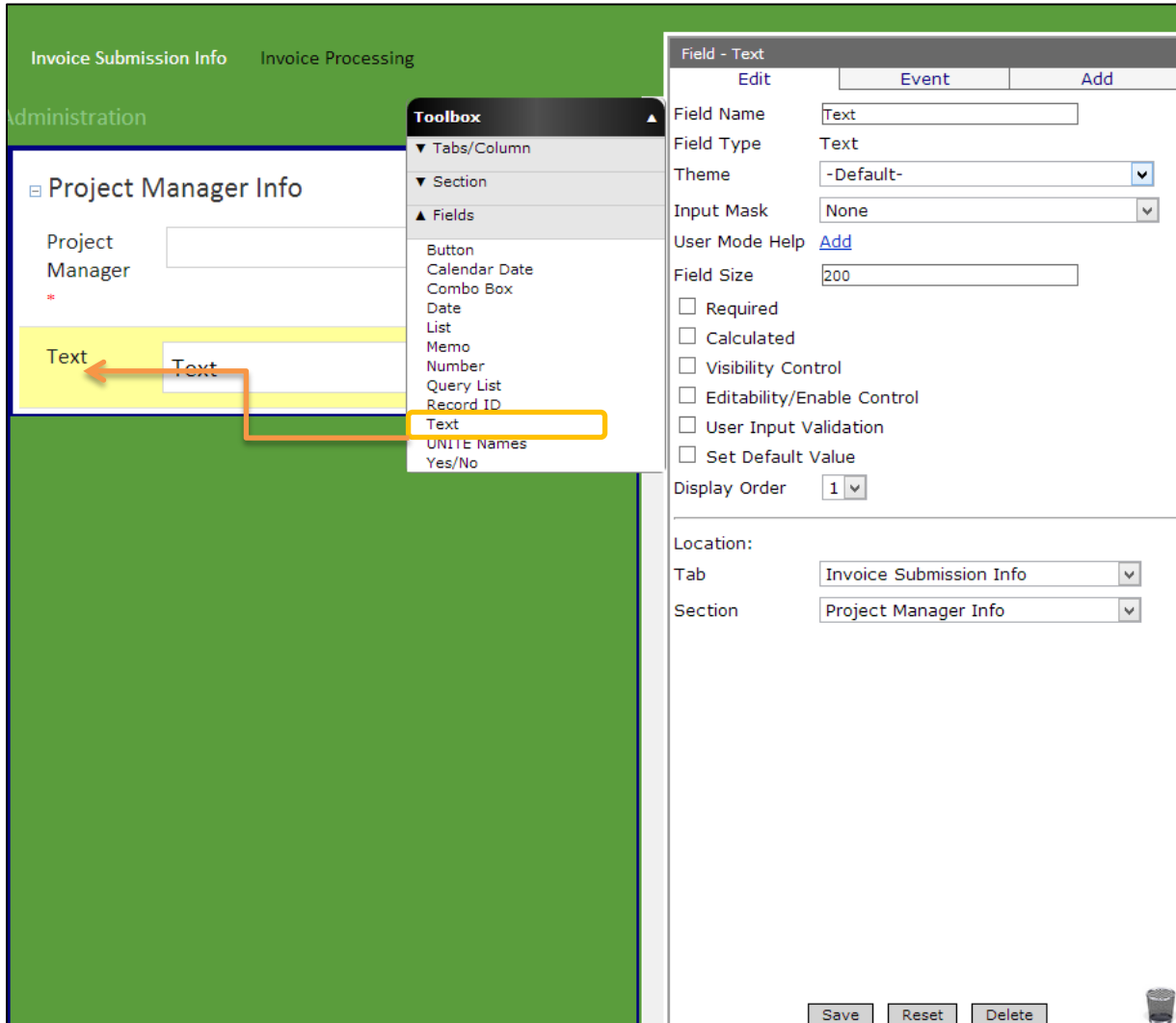
Dependencies:

❖ Name the Combo Box.

1. Select TRM from the System dropdown menu.
2. Select your company from the VE dropdown menu.
3. Select Contact from the Object dropdown menu.
4. Check the fields "Full Name (Last First)", Department, Email Address, Office and Region.
5. Select Search Field next to Full Name.
6. Give Full Name a Display Order of 10.
7. Give Email a Display Order of 20.
8. Give Department a Display Order of 30.
9. Give Office a Display Order of 40.
10. Give Region a Display Order of 50.
11. Click Save.



❖ Create a text Field Named Name



Finishing the Project Manager Section

1. Drag and drop a Text Field from the Toolbox into our Form.
2. Name this field "Name".

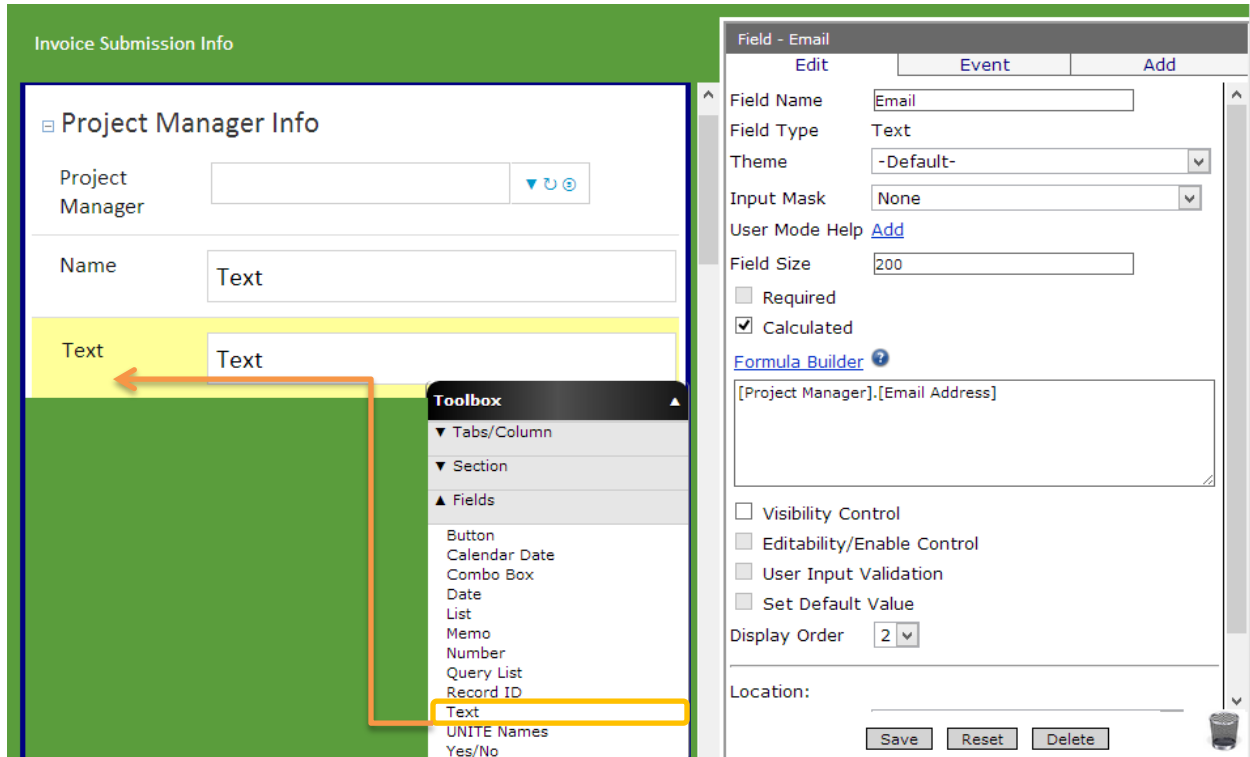


❖ Name the Text Field

3. Check Calculated.
4. Check Formula Builder.
5. Enter the following formula:
[Project Manager].[Full Name (Last First)]



❖ Create a text Field Named Email



1. Drag and drop a Text Field into our Form.
2. Name this field Email.
3. Check Calculated.
4. Check Formula Builder.
5. Enter the following formula:
[Project Manager].[Email Address]



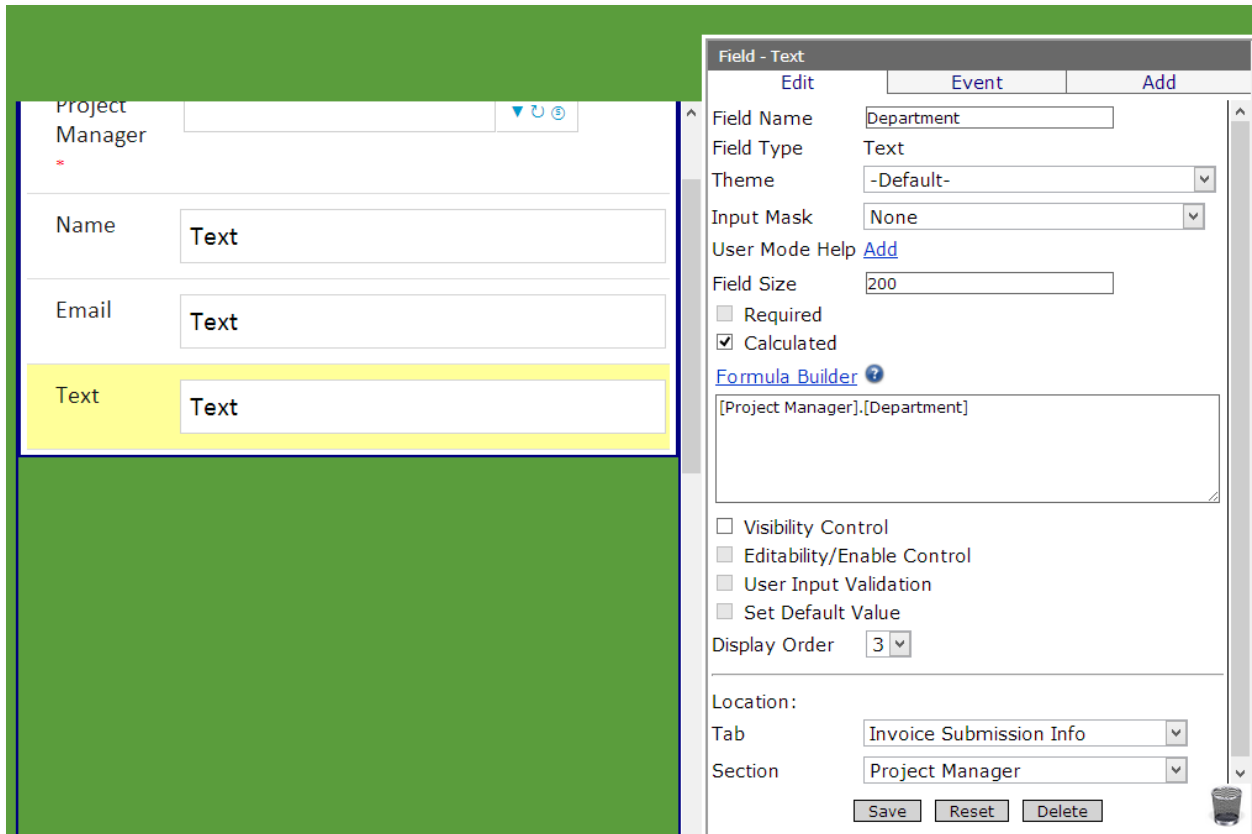
❖ Create a text Field Named Department

The screenshot shows the WAG software interface for creating a form. The main window is titled "Invoice Submission Info" and contains a section for "Project Manager Info". The form currently has fields for "Project Manager", "Name", and "Email". A new "Text" field is being added to the form, highlighted in yellow. A "Toolbox" on the right side of the form lists various field types, with "Text" highlighted in orange. A "Field - Text" configuration panel on the far right shows the settings for the field, including "Field Name" (Text), "Field Type" (Text), "Theme" (-Default-), "Input Mask" (None), "User Mode Help" (Add), "Field Size" (200), and "Display Order" (3). The "Location" section shows the field is being added to the "Invoice Submission Info" tab and the "Project Manager Info" section. The "Field - Text" panel also includes checkboxes for "Required", "Calculated", "Visibility Control", "Editability/Enable Control", "User Input Validation", and "Set Default Value". At the bottom of the panel are "Save", "Reset", and "Delete" buttons.

✓ Drag and drop a Text Field into our Form.



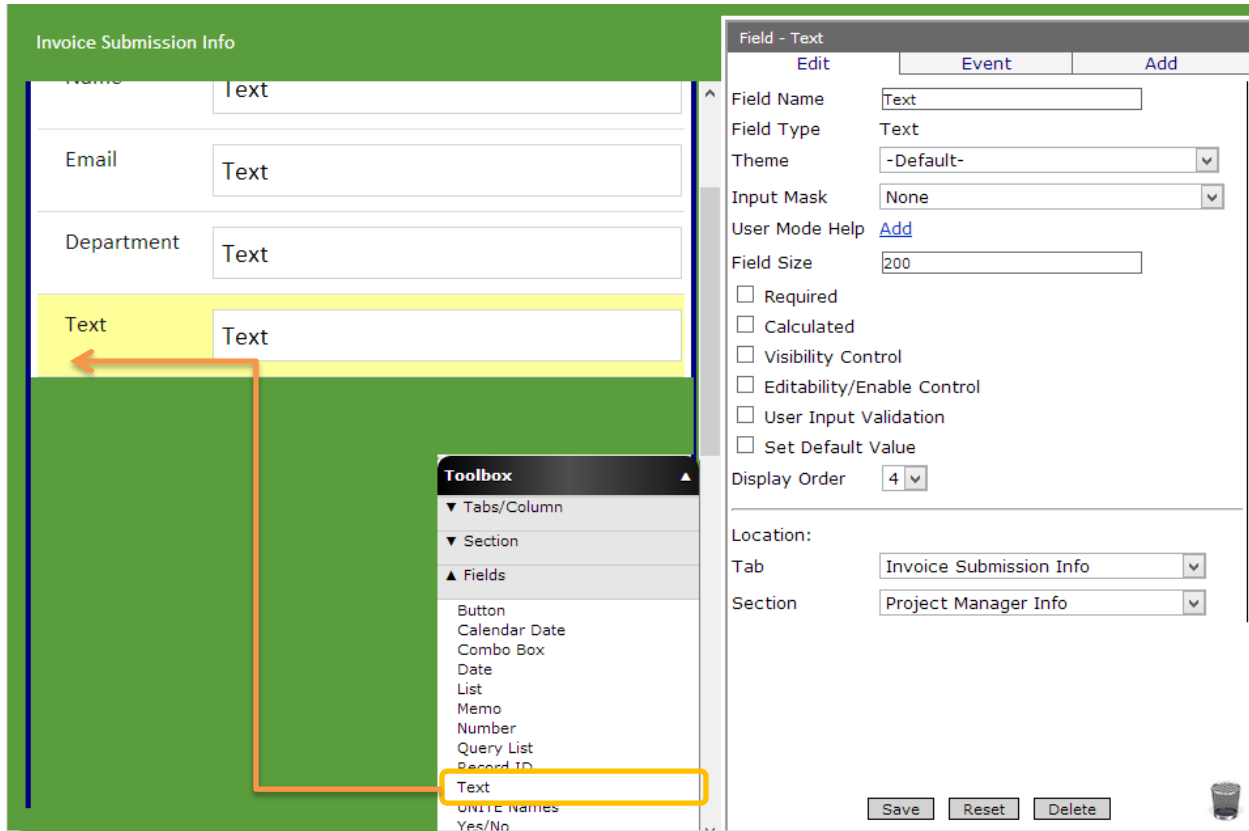
❖ Name the text field



1. Name this field "Department".
2. Check Calculated.
3. Check Formula Builder.
4. Enter the following formula:
[Project Manager].[Department]



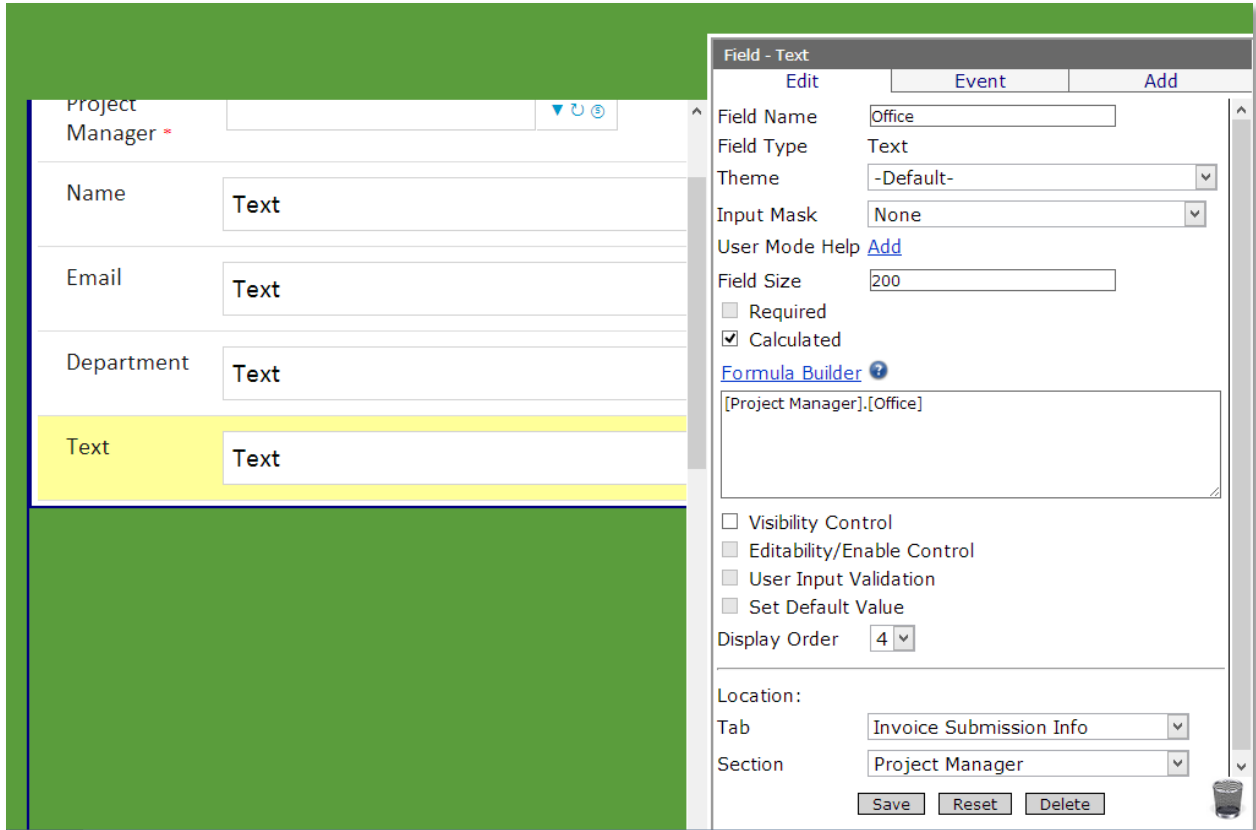
❖ Create a text Field Named Office



✓ Drag and drop a Text Field into our Form.



❖ Name the text field



1. Name this field "Office".
2. Check Calculated.
3. Check Formula Builder.
4. Enter the following formula:
[Project Manager].[Office]



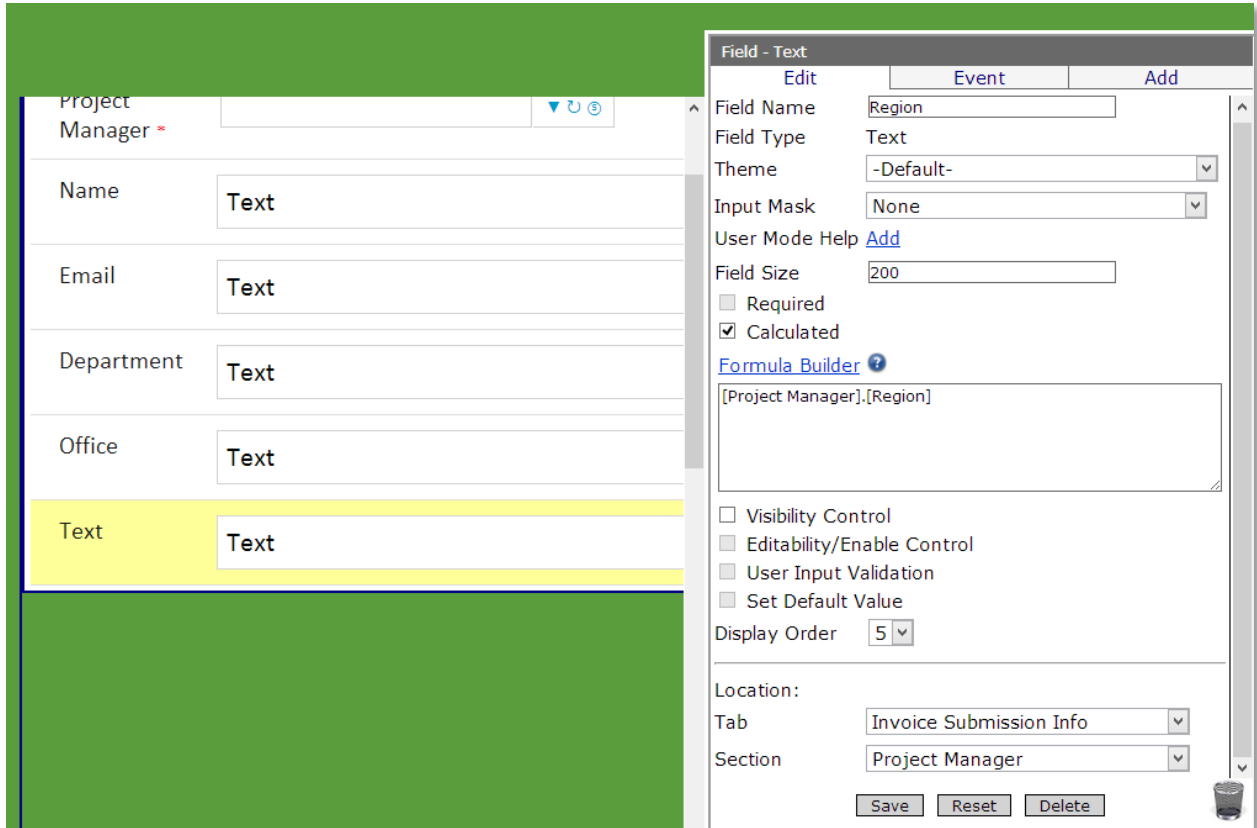
❖ Create a text Field Named Region

The screenshot illustrates the process of adding a text field to a form. The main window shows a form titled "Invoice Submission Info" with a section for "Project Manager Info". A "Toolbox" is open, displaying various field types. A "Text" field is being dragged from the toolbox to the form. A secondary window shows the configuration for the "Text" field, including "Field Name", "Field Type", "Theme", "Input Mask", "User Mode Help", "Field Size", "Display Order", and "Location".

✓ Drag and drop a Text Field into our Form.



❖ Name the Text field



1. Name this field "Region".
2. Check Calculated.
3. Check Formula Builder.
4. Enter the following formula:
[Project Manager].[Region]



❖ Create New Section Named Department Approver

✓ Drag and drop a Standard Section into the form from the Toolbox.



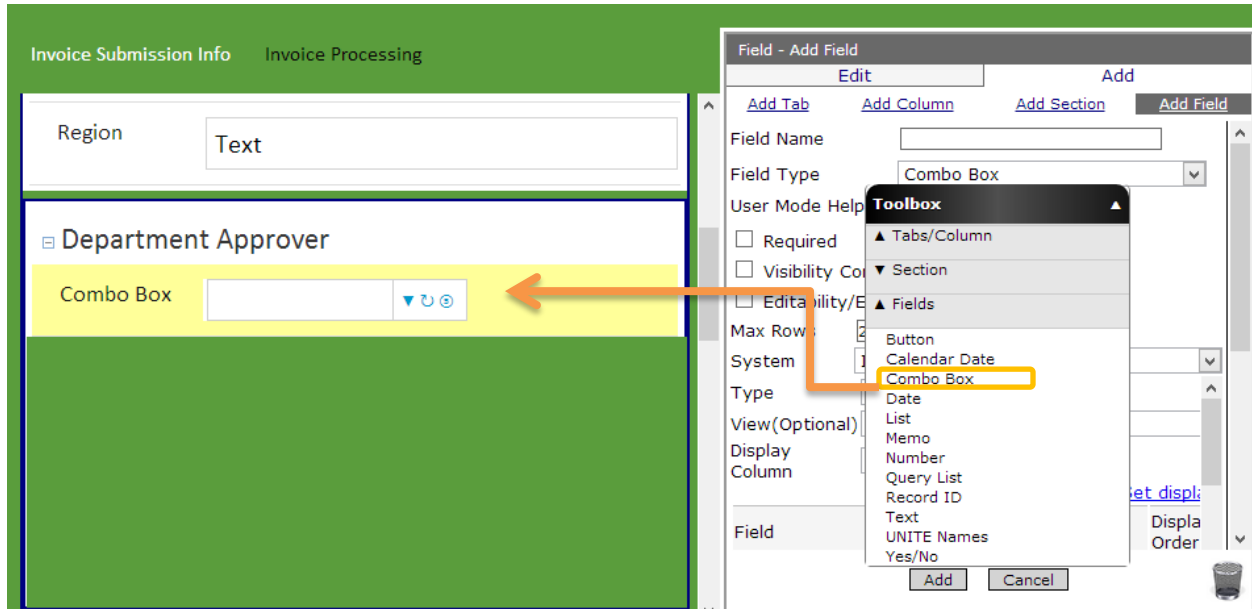
❖ Name the New Section

The screenshot shows the WAG Administration interface. On the left, there is a form titled "Project Manager Info" with fields for "Project Manager", "Name", "Email", "Department", "office", and "Region", each with a "Text" label. Below this is a "Standard" section with a "Click here to Add Fields" link. On the right, a "Section - Standard" properties dialog box is open. It has "Edit" and "Add" tabs. The "Section Name" is "Department Approver", "Display Order" is "1", "Theme" is "-Default-", and "Section Type" is "Standard". There are checkboxes for "Show in Print Preview" (checked), "Visibility Control", and "Editability/Enable Con". A "Toolbox" is open, showing a list of field types: "Standard", "Matching", "Document", "Document Management", "Fixed HTML", "Rich Text - Enhanced", "Rich Text", "DataGrid - Subform", "Discussion", "DataGrid - Internal Storage", "DataGrid - SQL Read-Only", "Chart", and "Fields". At the bottom of the dialog are "Save", "Reset", and "Delete" buttons.

1. In the Properties box click in Section name and type Department Approver
2. Click Save



❖ Create A Combo Box Named Approver Name



- ✓ Drag and drop a Combo Box into this section from the Toolbox.



❖ Name the Combo Box

Field - Add Field

Edit Add

Add Tab Add Column Add Section Add Field

Field Name Approver Name

Field Type Combo Box

User Mode Help Add

Required

Visibility Control

Editability/Enable Control

Max Rows 20

System Accounting

Type Approver

View(Optional)

Display Column - Search Field -

[Set display order](#)

Field	Search Field	Display Order
<input checked="" type="checkbox"/> Department	<input type="radio"/>	2
=		Remove Filter
Department		
<input checked="" type="checkbox"/> Email	<input type="radio"/>	3
Set Filter		
<input checked="" type="checkbox"/> Name	<input checked="" type="radio"/>	1
Set Filter		
<input checked="" type="checkbox"/> Threshold	<input type="radio"/>	4
>=		Remove Filter
Invoice Total		

Note: Query List Field, UNITE Name Field, and Combo Box Field are not searchable.

Add Cancel

1. Name this combo box "Approver Name"

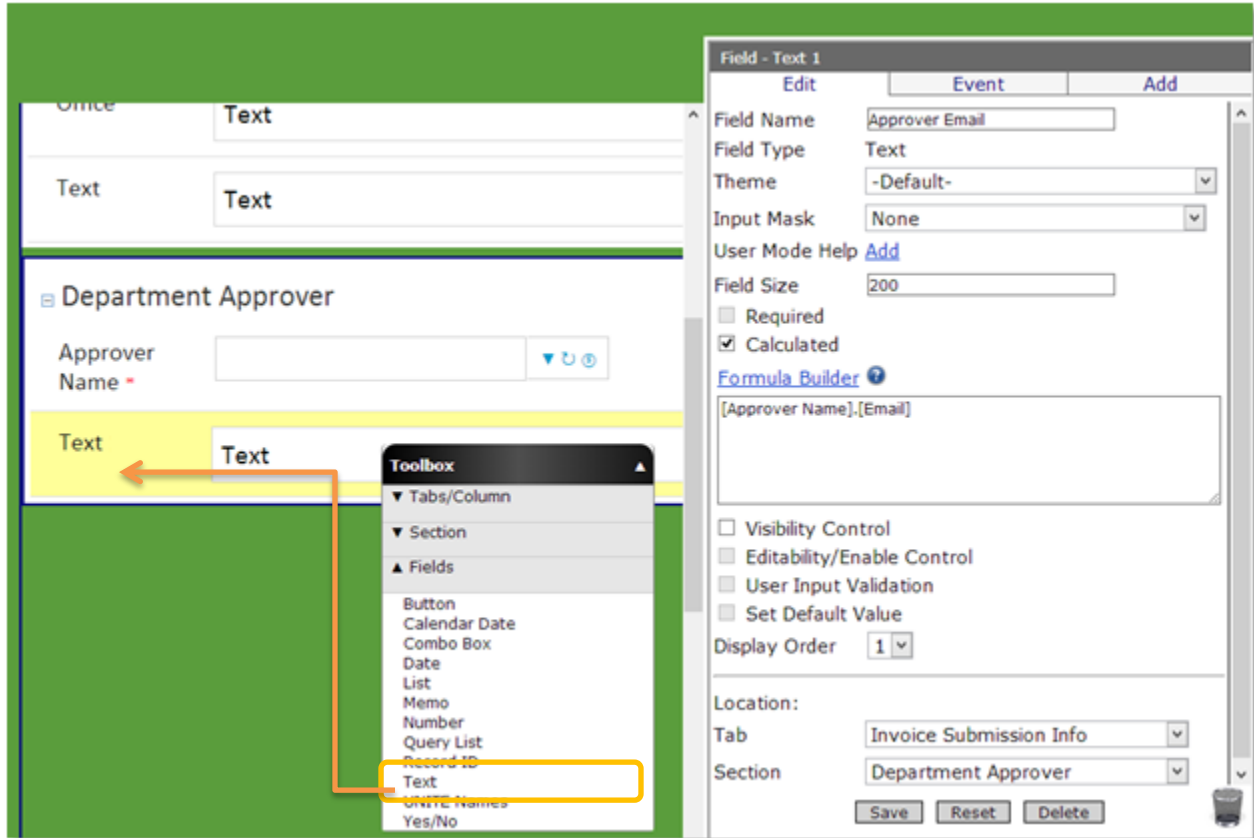
This box will take information from another WAG app that contains Departments and their associated approvers. We will only want to select from approvers who are in the same department as the Project Manager and whose approval thresholds are above the invoice total. This bit of logic is simple to implement.

2. Click "Set Filter" underneath Department.
3. Select "=" from the dropdown menu
4. Select Department from the dropdown menu beneath the previous.
5. Click "Set Filter" underneath Threshold
6. Select ">="
7. Select "Invoice Total" from the dropdown menu.

8. Click Add



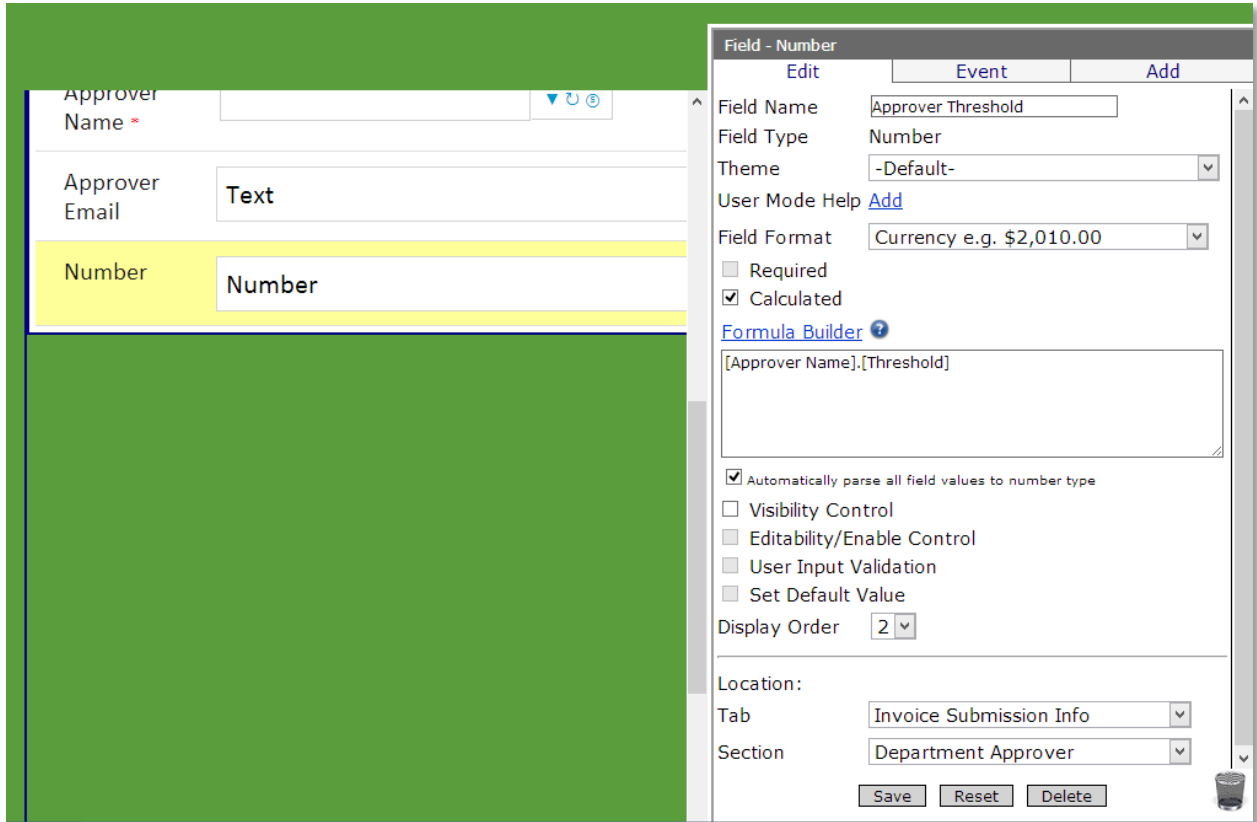
- ❖ Create a Text Field Named Approver Email.



1. Drag and drop a text field into this section.
2. Name this field *Approver Email*
3. Check Calculated
4. Click Formula Builder
5. Enter the following Formula:
[Approver Name].[Email]



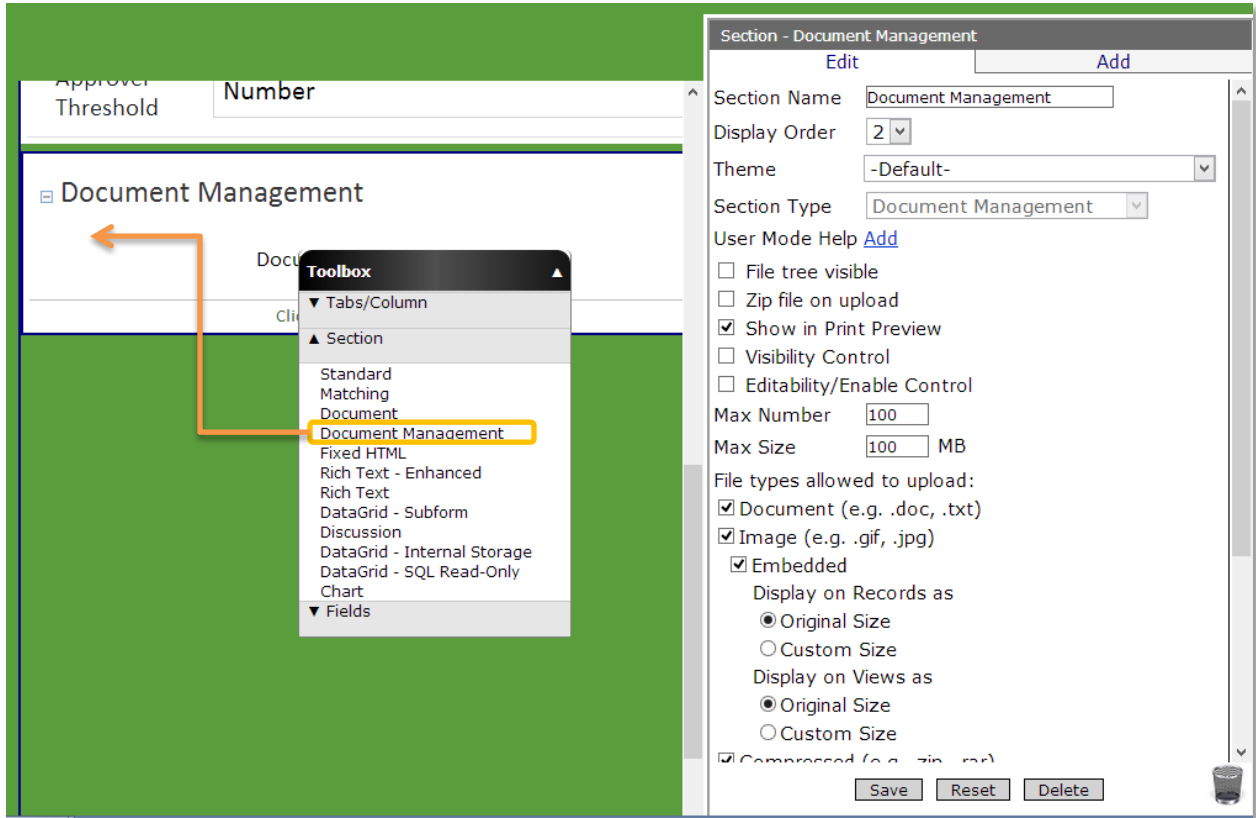
❖ Create A Number Field Named Approver Threshold



1. Drag and drop a Number field into this section.
2. Name this field *Approver Threshold*
3. Check Calculated
4. Click Formula Builder
5. Enter the following formula:
[Approver Name].[Threshold]



❖ Create A Document Management Section Named Documents



Adding a Documents Section

If our users want to include a PDF or image of the original invoice, we can add that by including a Document Management section in our application.

1. Drag and drop a Document Management Section into our form from the Toolbox.



❖ Name the Section

The screenshot shows a configuration window for a section named 'Document Management'. The window is titled 'Section - Document Management' and has two tabs: 'Edit' and 'Add'. The 'Edit' tab is active. The configuration includes the following fields and options:

- Section Name: Documents
- Display Order: 2
- Theme: -Default-
- Section Type: Document Management
- User Mode Help: [Add](#)
- File tree visible
- Zip file on upload
- Show in Print Preview
- Visibility Control
- Editability/Enable Control
- Max Number: 100
- Max Size: 100 MB
- File types allowed to upload:
 - Document (e.g. .doc, .txt)
 - Image (e.g. .gif, .jpg)
 - Embedded
 - Display on Records as:
 - Original Size
 - Custom Size
 - Display on Views as:
 - Original Size
 - Custom Size
 - Compressed (e.g. zip, rar)

Buttons: Save, Reset, Delete

1. Name this section Documents
2. Make sure that Document, Image, Compressed, Video, Audio and PDF File are checked.
3. Click Save.



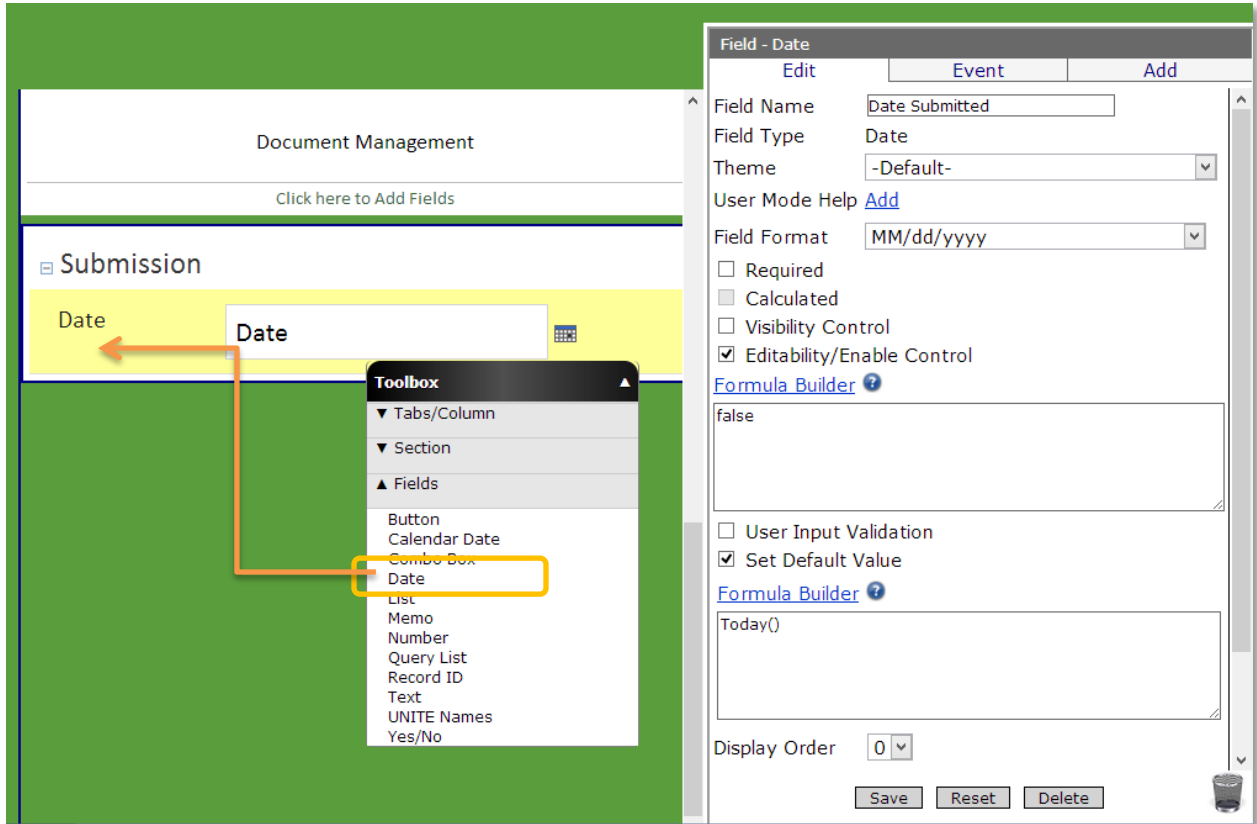
❖ Create A Section Named Submission

The screenshot displays a form builder interface. On the left, a form layout is shown with two sections: 'Document Management' and 'Standard'. The 'Document Management' section contains a 'Text' field for 'Approver Email' and a 'Number' field for 'Approver Threshold'. The 'Standard' section is currently empty. On the right, a configuration panel for the 'Section - Standard' is open. It includes fields for 'Section Name' (Submission), 'Display Order' (4), 'Theme' (-Default-), and 'Section Type' (Standard). There are also checkboxes for 'Show in Print Preview' (checked), 'Visibility Control', and 'Editability/Enable Control'. The 'Location' is set to 'Tab: Invoice Submission Info' and 'Column: Administration'.

1. Drag and drop a Standard section into our form.
2. Name this section Submission
3. Click Save



❖ Create a Date Field Named Date Submitted



1. Drag and drop a Date field into this section.
2. Name this field Date Submitted



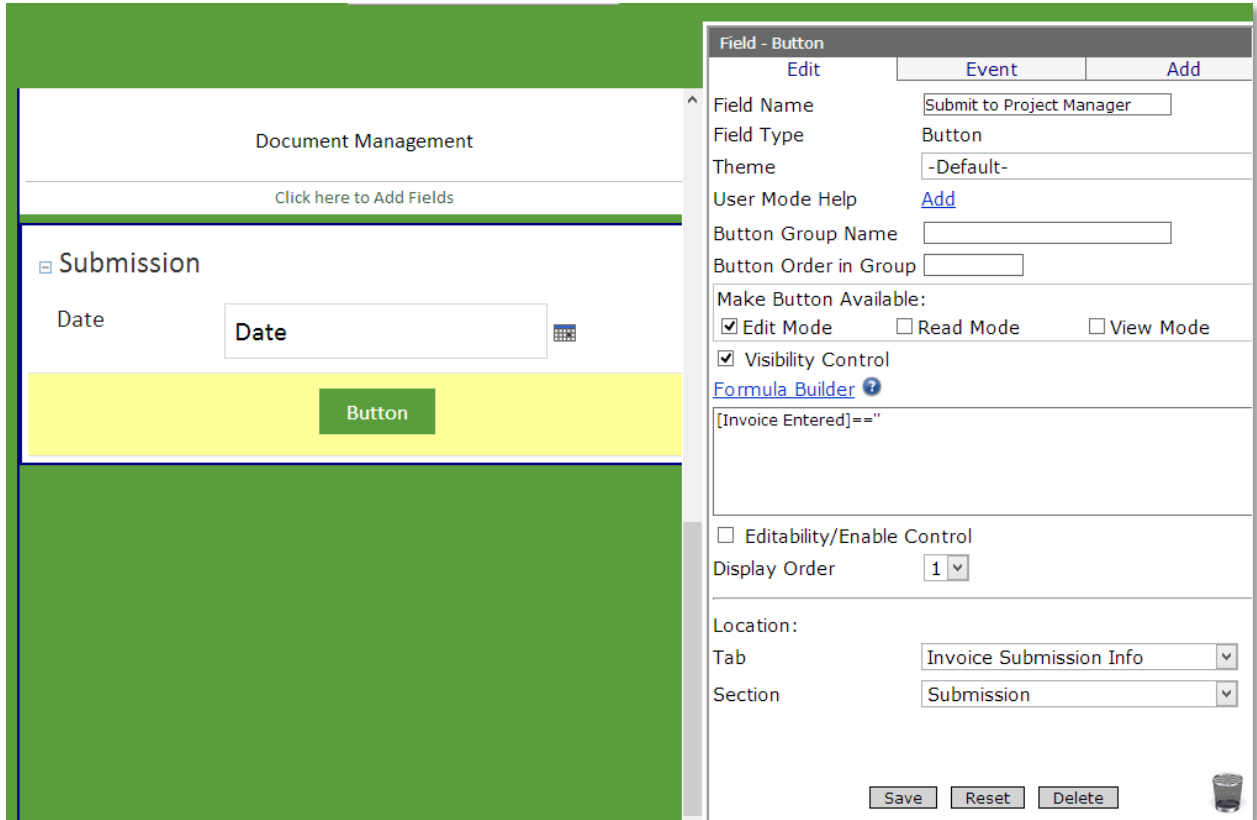
❖ Create a Button Named Submit to Project Manager

The screenshot displays the WAG interface for editing a form. The main area shows a 'Document Management' header, a 'Click here to Add Fields' link, and a 'Submission' section containing a 'Date' field and a 'Button' field. A 'Toolbox' is open, showing a list of field types with 'Button' selected. A 'Field - Button' configuration panel is open on the right, showing settings for the 'Button' field, including 'Field Name', 'Field Type', 'Theme', 'User Mode Help', 'Button Group Name', 'Button Order in Group', 'Make Button Available' (with 'Edit Mode' checked), 'Visibility Control', 'Editability/Enable Control', 'Display Order', 'Location' (Tab: 'Invoice Submission Info', Section: 'Submission'), and 'Save', 'Reset', and 'Delete' buttons.

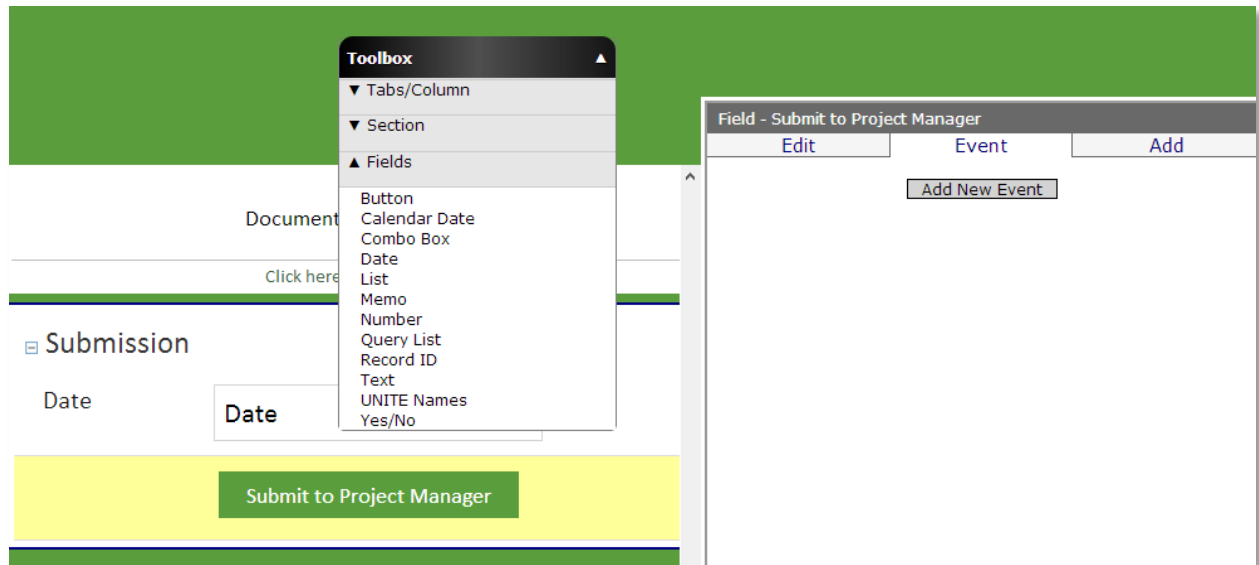
✓ Drag and drop a Button field into this section from the Toolbox.



❖ Name the Button



1. Name this button "Submit to Project Manager."
- ✓ We won't want this button to appear after the form has been sent to the manager. We will change the Visibility Control:
 2. Check the Visibility Control
 3. Click Formula Builder and enter the following formula:
[Invoice Entered]==''
 - ✓ Thus, only while the Invoice Entered flag is empty will the submit button be visible.



✓ We want this button to save our invoice, flag it as entered and email it to the project manager. The following screens will show how to do this

1. Click on Event in the Properties tab.
2. Click "Add New Event"



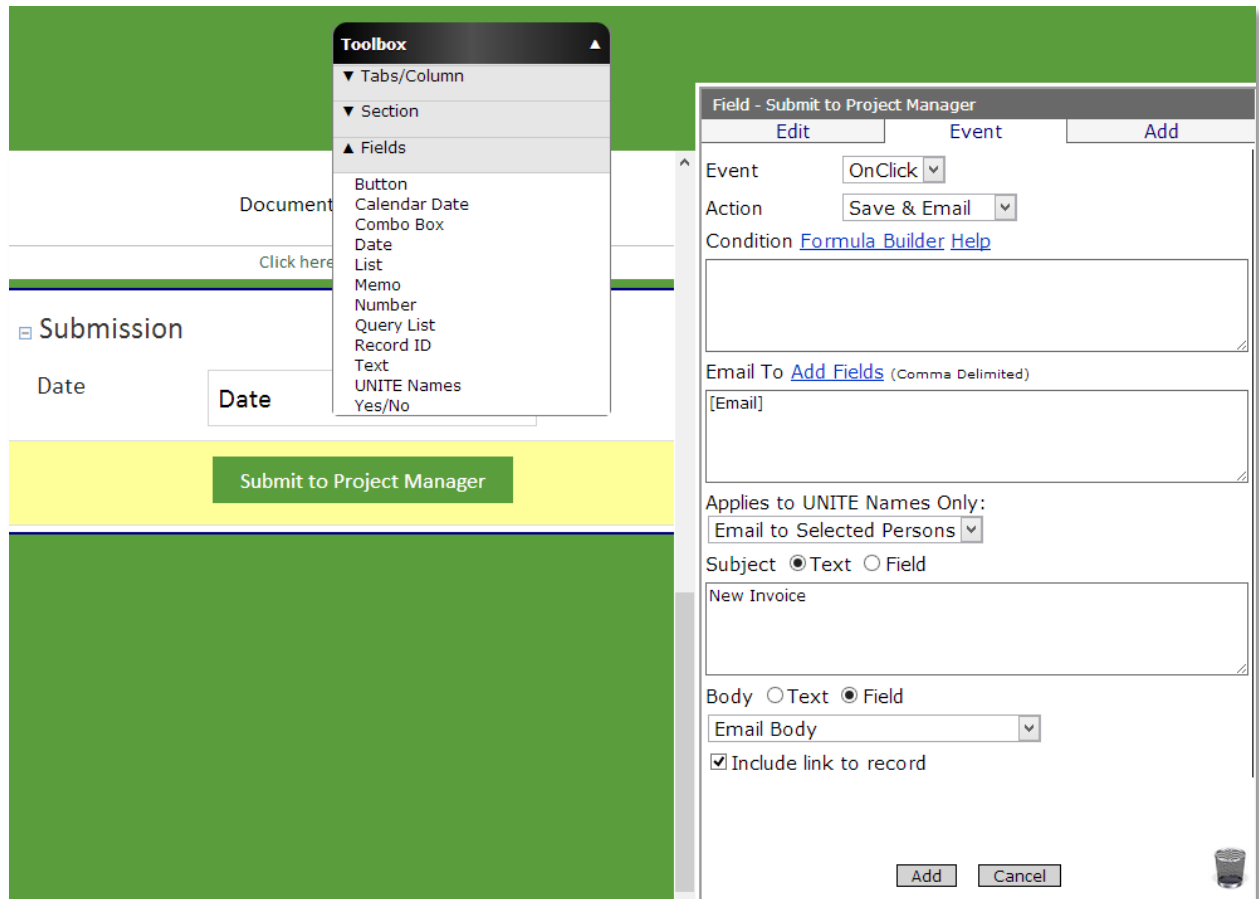
A screenshot of the WAG software interface. On the left, a 'Toolbox' window is open, showing a list of 'Fields' including Button, Calendar Date, Combo Box, Date, List, Memo, Number, Query List, Record ID, Text, UNITE Names, and Yes/No. The 'Date' field is selected. In the background, a 'Submission' form is visible with a 'Date' field and a yellow 'Submit to Project Manager' button. On the right, a configuration window titled 'Field - Submit to Project Manager' is open. It has tabs for 'Edit', 'Event', and 'Add'. The 'Event' dropdown is set to 'OnClick'. The 'Action' dropdown is set to 'Set Value'. The 'Condition' is set to 'Formula Builder Help'. The 'Field' dropdown is set to 'Invoice Entered'. The 'Value' is set to 'Yes'. At the bottom of the configuration window are 'Add' and 'Cancel' buttons.

1. Select "Set Value" from the Action dropdown menu
2. Select "Invoice Entered" from the Field dropdown menu.
3. Enter 'Yes' in the Value formula box.
4. Click Save.



The screenshot displays a software interface with a green header and a yellow footer. A 'Toolbox' menu is open, listing various field types under the 'Fields' section: Button, Calendar Date, Combo Box, Date, List, Memo, Number, Query List, Record ID, Text, UNITE Names, and Yes/No. Below the toolbox, a 'Field - Submit to Project Manager' configuration window is visible. It has three tabs: 'Edit', 'Event', and 'Add'. The 'Event' tab is selected, showing a configuration for 'Fire Order 1'. The configuration includes a condition: 'Field: Invoice Entered' and a value: 'Yes'. An 'Add New Event' button is located at the bottom of the configuration window. In the background, a 'Submission' form is partially visible, featuring a 'Date' field and a 'Submit to Project Manager' button in the yellow footer.

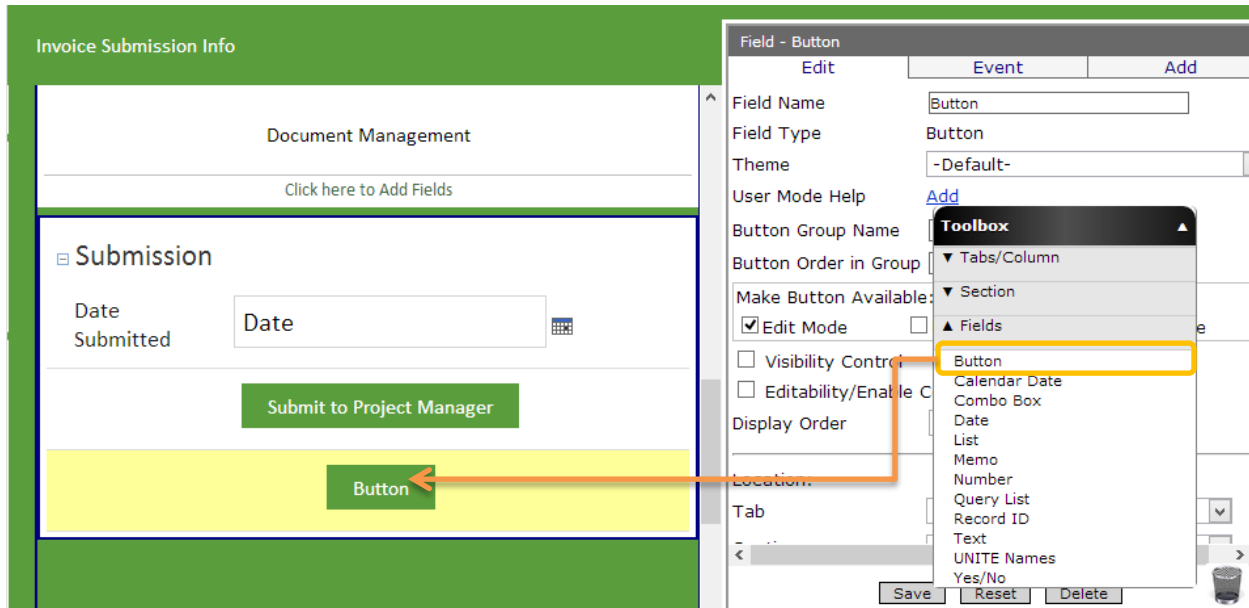
Click "Add New Event"



1. Select "Save & Email" from the Action dropdown menu.
2. Type *[Email]* in the *Email To* field
3. Type *New Invoice* in the Subject text field.
4. Click *Field* next to *Body*
5. Select *Email Body* from the dropdown menu beneath *Body*.
6. Check *Include link to record*.



❖ Create Button named Submit to Department Approver



- ✓ This button will save our invoice, flag it as entered and email it to the project manager.

Drag and drop a Button field into this section



❖ Name the button

The screenshot shows a software interface with a form and a properties box. The form has a green header and contains the following elements:

- Approver Threshold:** A text input field with the value "Number".
- Documents:** A section with a "Document Management" label and a "Click here to Add Fields" link.
- Submission:** A section with a "Date Submitted" text input field and a "Submit to project Manager" button.
- Button:** A yellow highlighted area with a "Button" label.

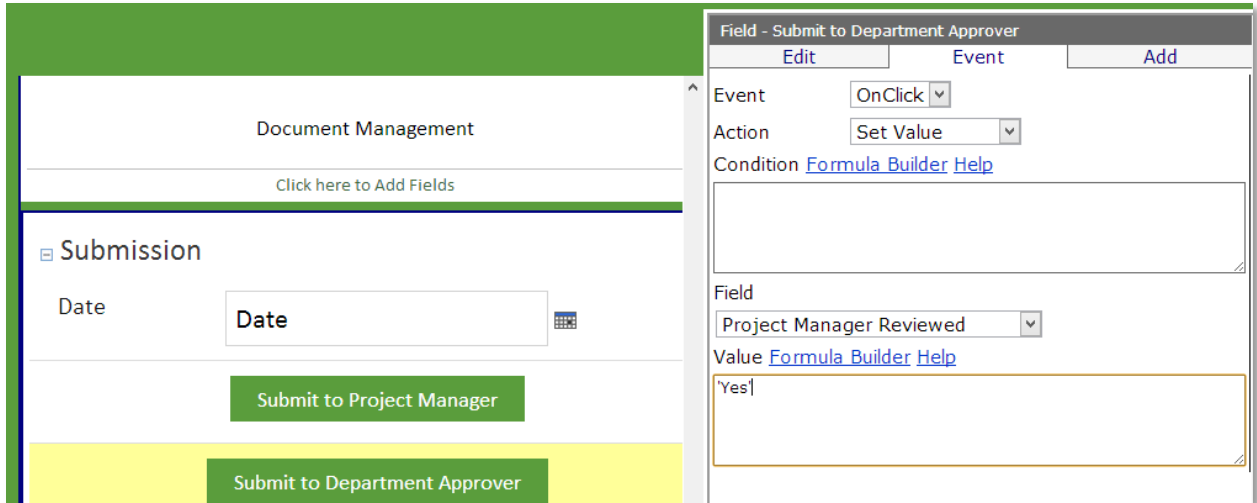
The properties box on the right is titled "Field - Submit to Department Approver" and has tabs for "Edit", "Event", and "Add". It contains the following settings:

- Field Name:** Submit to Department Approver
- Field Type:** Button
- Theme:** -Default-
- User Mode Help:** Add
- Button Group Name:** [Empty]
- Button Order in Group:** [Empty]
- Make Button Available:** Edit Mode, Read Mode, View Mode
- Visibility Control:** Visibility Control
- Formula Builder:** [Invoice Entered]!="" && [Project Manager Reviewed] == ""
- Editability/Enable Control:** Editability/Enable Control
- Display Order:** 3
- Location:** Tab: Invoice Submission Info, Section: Submission
- Buttons:** Save, Reset, Delete

1. In the Properties Box click in Field Name and Type *Submit to Department Approver*.
2. Check the Visibility Control and put the following formula:
[Invoice Entered]!="" && [Project Manager Reviewed] == ""
3. Click **Save**



❖ Forming the Button



1. Name this button Submit to Department Approver.
2. Click on Event in the Properties tab.
3. Click *Add New Event*
4. Select **Set Value** from the Action dropdown menu.
5. Select *Invoice Manager Reviewed* from the *Field* dropdown menu.
6. Click **Formula Builder** and enter the following formula: 'Yes'
7. Click *Save*



The screenshot displays the 'Document Management' interface. The main form has a 'Submission' section with a 'Date' field and two buttons: 'Submit to Project Manager' and 'Submit to Department Approver'. The latter is highlighted in yellow. A configuration panel on the right, titled 'Field - Submit to Department Approver', shows settings for an 'Event' (OnClick), 'Action' (Save & Email), and 'Condition' (Formula Builder Help). The 'Email To' field is set to '[Approver Email]' and the 'Subject' is 'New Invoice'. The 'Body' text contains 'A New invoice is Awaiting your approval'.

8. Click Add New Event
9. Select Save & Email from the Action dropdown menu.
10. Click Add Fields next to the *Email To* formula box.
11. Select *[Approver Email]* from the list.
12. Type *New Invoice* into the Subject text box.
13. Type *A new invoice is awaiting your approval* into the *Body* text box.
14. Check *Include link to record*
15. Click *Save*



❖ Create a new Tab Named Invoice Processing

The screenshot displays the WAG interface for editing an invoice form. At the top, it says "Invoice: Edit". Below that, there are fields for "Description:", "Unique Keys:", "Buttons Visibility: Mode", and "Default Mode: Read Mode". There are two buttons: "Delete Form" and "Close".

The main area shows a tab labeled "Invoice Submission Info" with a sub-tab "tab" next to it. Below this, there is a "tab Column 1" and a link "Click Here to add section".

A "Toolbox" is open, showing a tree view with "Tabs/Column" expanded. The "Tab" option is highlighted with a yellow box, and an orange arrow points from it to the "tab" sub-tab in the main area.

The "Tab - tab" configuration dialog is open, showing the following settings:

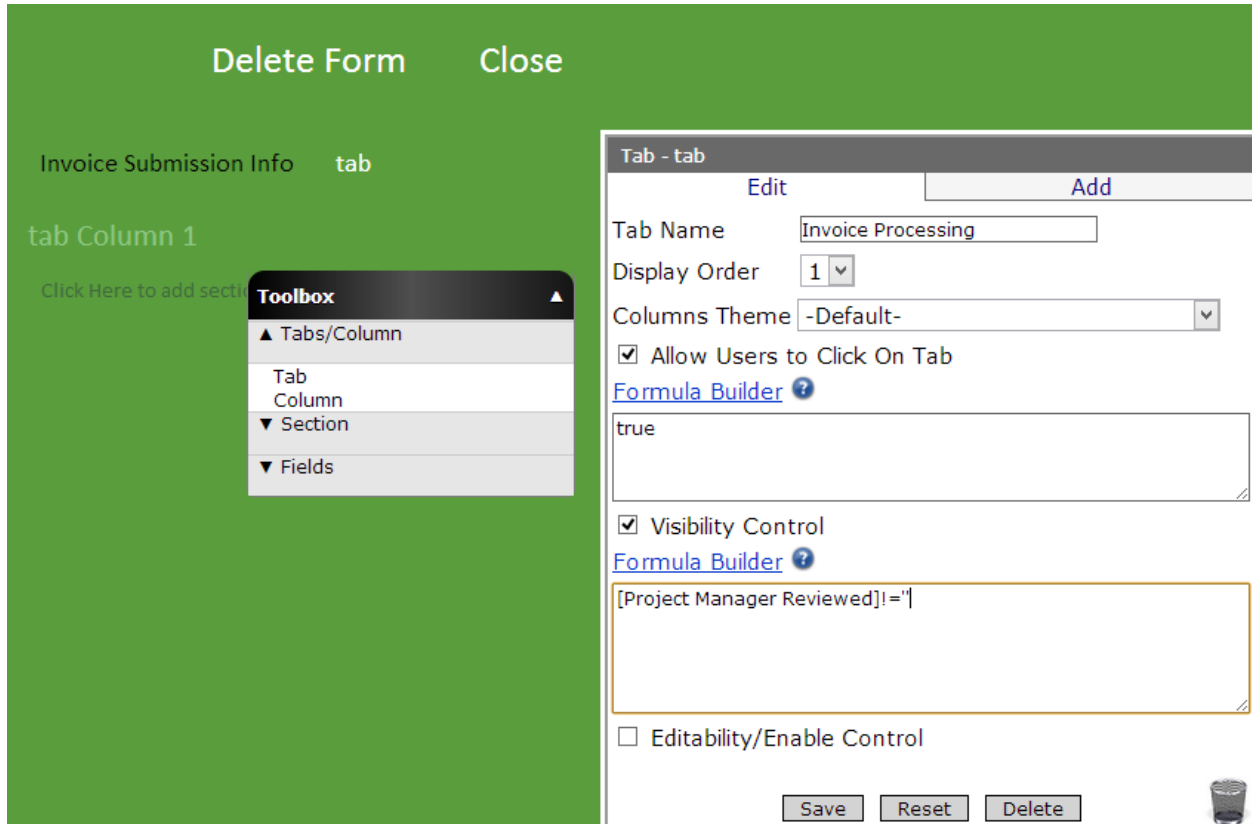
- Tab Name: tab
- Display Order: 1
- Columns Theme: -Default-
- Allow Users to Click On Tab
- [Formula Builder](#) ?
- true
- Visibility Control
- Editability/Enable Control

At the bottom of the dialog are buttons for "Save", "Reset", and "Delete", along with a trash icon.

- ✓ Drag and drop a new tab from the toolbox next to the *Invoice Submission Info* tab.



- ❖ Name the new tab.



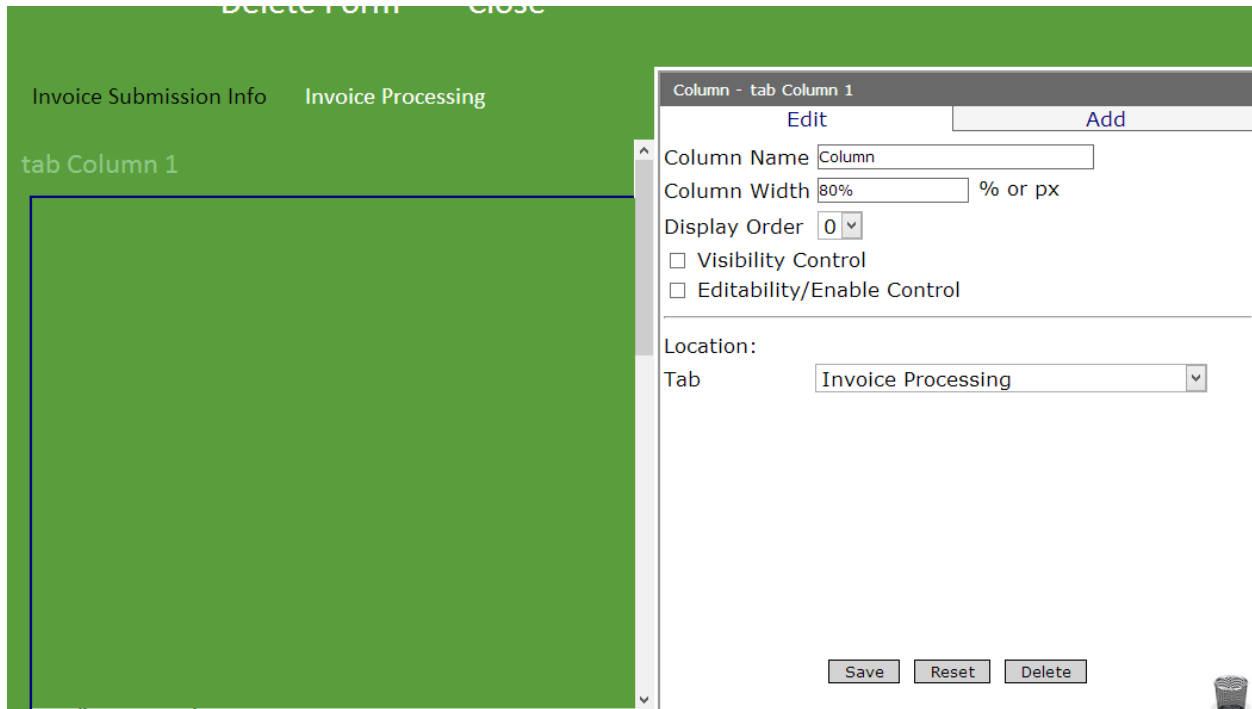
- 1) Click in the *Tab Name* and type *Invoice Processing*.
- 2) Check *Visibility control*, click on *formula builder* and put the following formula:

[Project Manager Reviewed]!=""

- ✓ Thus, only when the Invoice is reviewed by project manager will the Invoice Processing tab be visible.



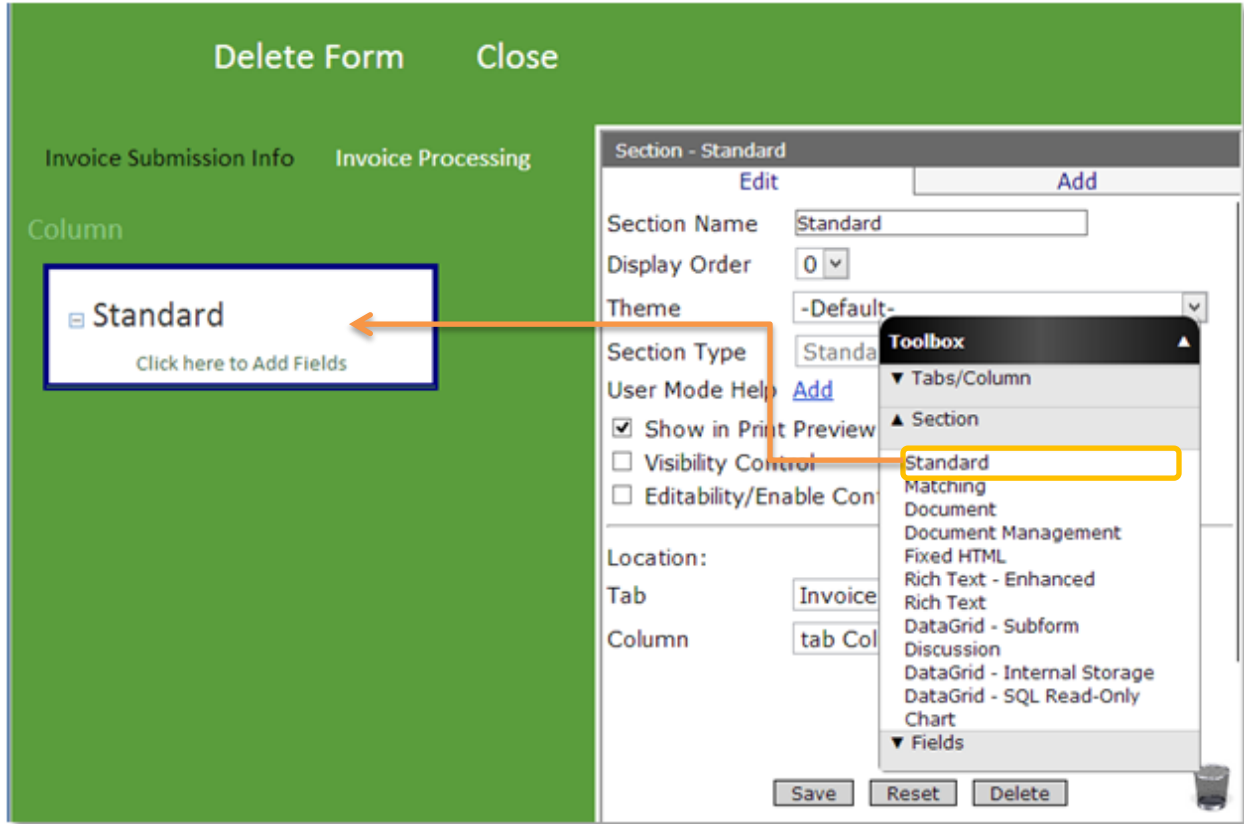
❖ Rename the Tab Column On to Column



1. Click on Tab Column 1
2. In the Properties Box click in Column Name and type Column.
3. Click Save.



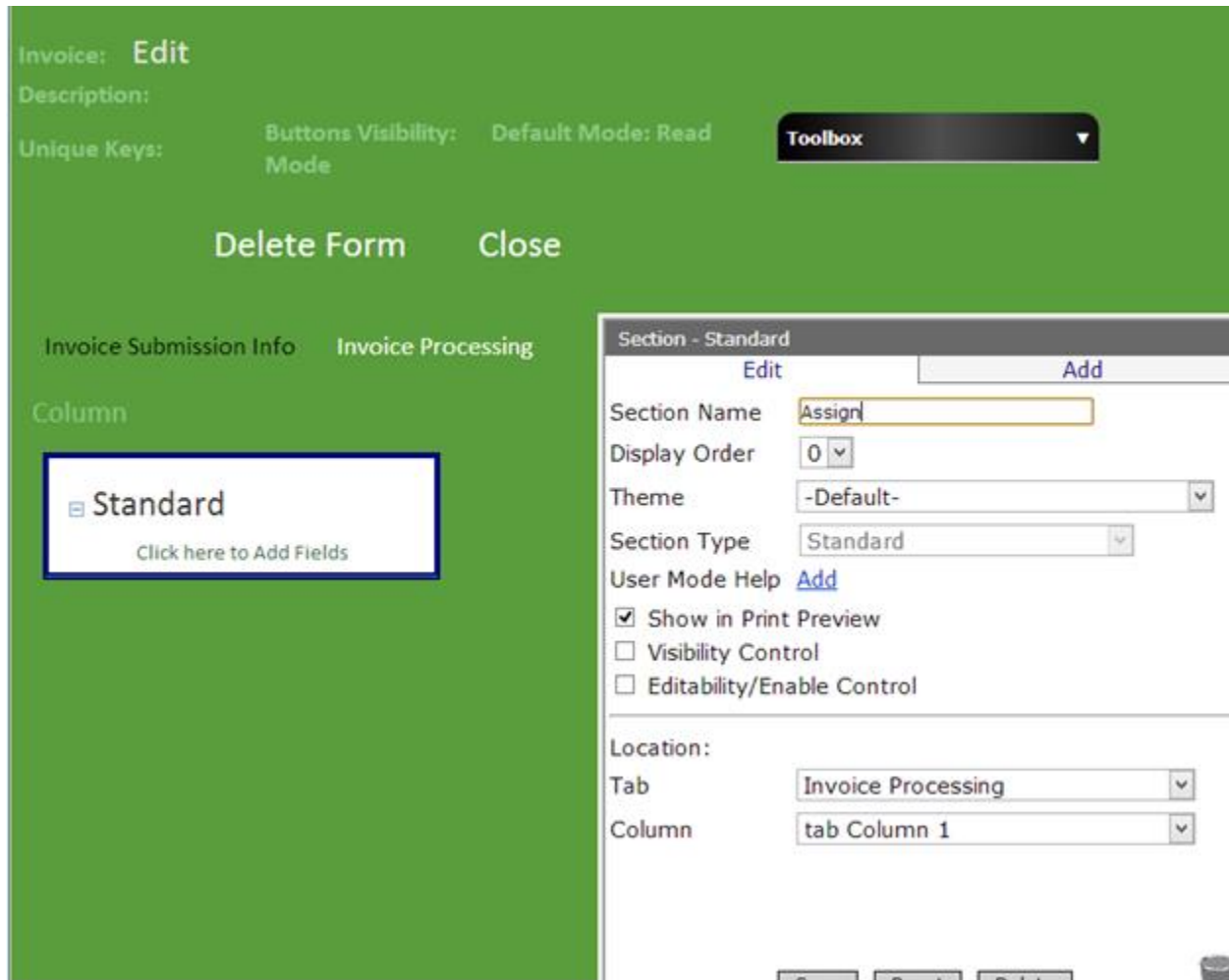
- ❖ Create a New Section Named Assign



- ✓ Drag and drop a *Standard* section from the Toolbox into this tab



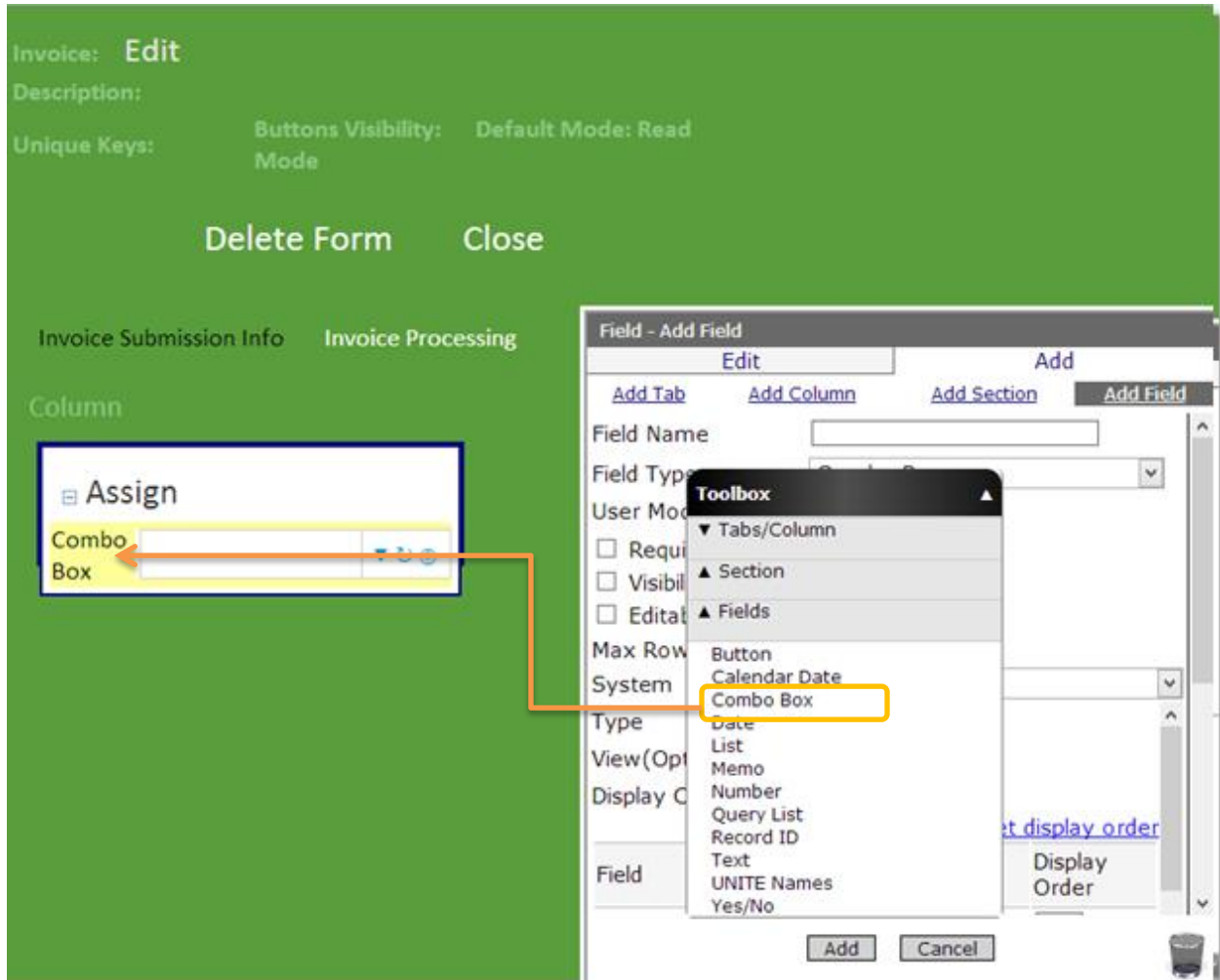
❖ Name the Section



1. Click in Section Name and type Assign
2. Click Save.



❖ Create A Combo Box Named Assigned to



✓ Drag and drop a Combo box field into the Assign section.



❖ Name the Combo Box.

Field Name	Field Type	Theme	User Mode Help	Required	Visibility Control	Editability/Enable Control	Set Default Value	Display Order	Max Rows	System
Assigned To	Combo Box	-Default-	Add	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	20	TRM
<input checked="" type="checkbox"/> Email Address	<input type="radio"/>	2	Set Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/> Fax	<input type="radio"/>		Set Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
<input checked="" type="checkbox"/> First Name	<input type="radio"/>	3	Set Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/> Full Address	<input type="radio"/>		Set Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
<input checked="" type="checkbox"/> Full Name (Last First)	<input checked="" type="radio"/>	1	Set Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/> Full Name (First Last)	<input type="radio"/>		Set Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/> Greeting	<input type="radio"/>		Set Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/> Home Fax	<input type="radio"/>		Set Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

Note: Query List Field, UNITE Name Field, and Combo Box Field are not searchable.

1. Name this field Assigned To

This combo box will draw information from our Total Relationship Management System. Details about this system are available on corporatecentral.com. Your combo box can use information from another WAG app, a database or a list you create yourself.

2. Select "TRM" from the System dropdown menu.

3. Select your company from the VE dropdown menu

4. Select "Contact" from the Object dropdown menu.

5. Set the Display Column to "Full Name (Last First)"

6. Select the fields Email, Full Name (Last First), First Name, Last Name, and Department.

7. Select the button next to Full Name (Last First) and give it a Display Order of 10.

8. Give Last Name a Display Order of 2.

9. Give First Name a Display Order of 3.

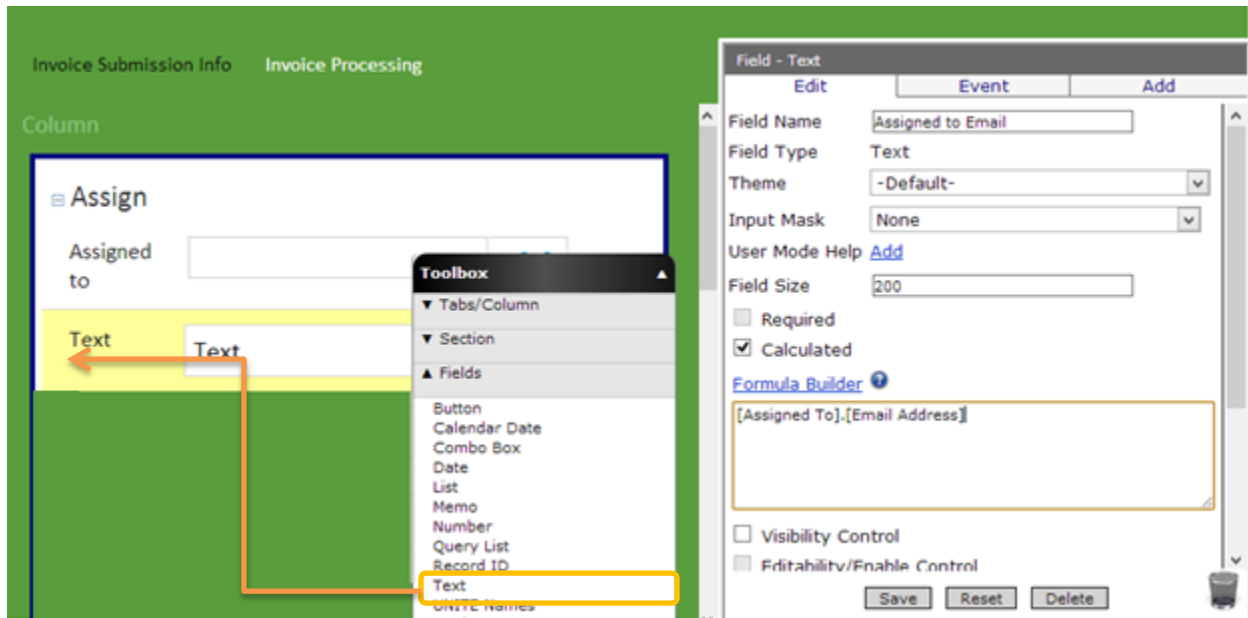
10. Give Email a Display Order of 4.

11. Give Department a Display Order of 5.

12. Click Save.



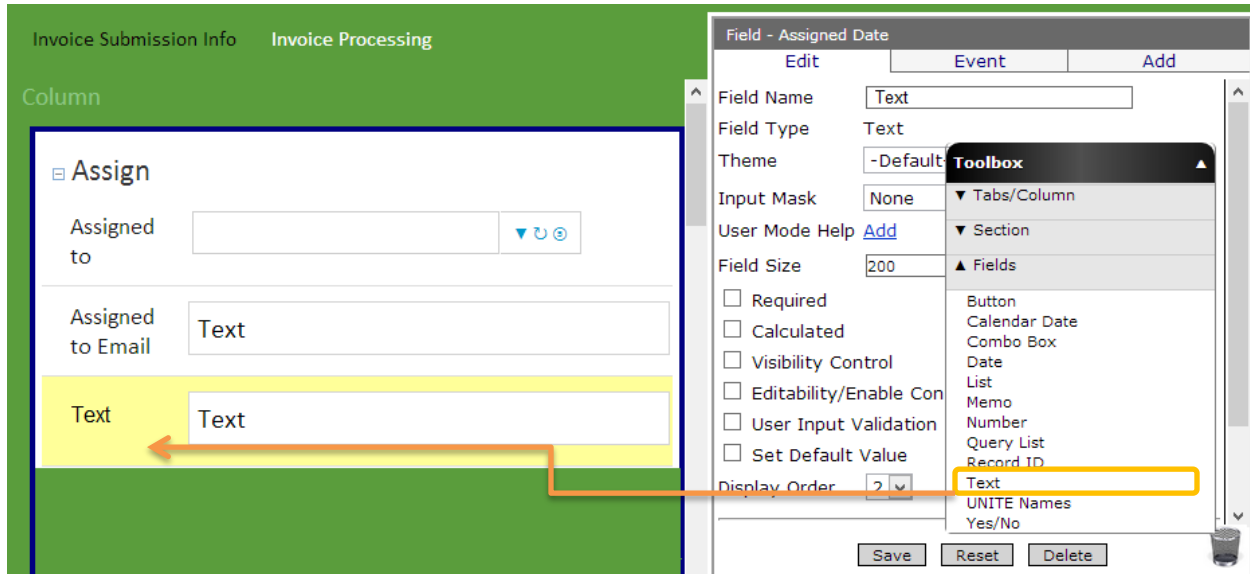
❖ Create a New text Field Named *Assigned Email*



1. Drag and drop a Text field into the Assign section.
2. Name this field *Assigned To Email*
3. Check Calculated.
4. Click Formula Builder and enter this formula:
[Assigned To].[Email Address]
5. Click Add
6. Click Save



❖ Create a Text Field Named Assigned Date



✓ Drag and drop a Text field into the Assign section.

1. In the properties box click in Field Name and type Assigned Date
2. Click Save.



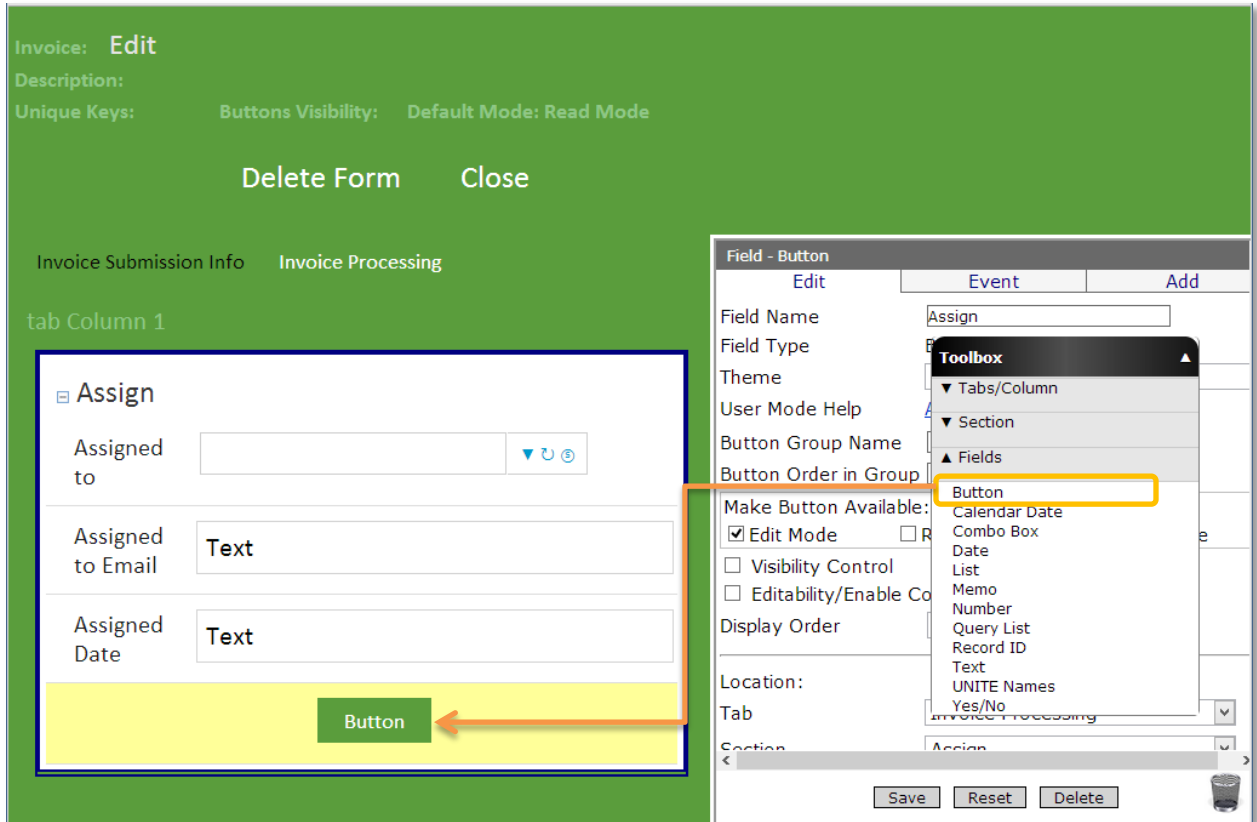
❖ Name the Text Field

The screenshot shows the WAG software interface. At the top, there is a green header with the text "Invoice: Edit", "Description:", "Unique Keys:", "Buttons Visibility:", and "Default Mode: Read Mode". Below this, there are buttons for "Delete Form" and "Close". The main area is divided into two tabs: "Invoice" and "Invoice Processing". Under the "Invoice Processing" tab, there is a "tab Column 1" containing a form with three rows. The first row is labeled "Assign" and has a text field for "Assigned To" with a dropdown arrow and a refresh icon. The second row is labeled "Assigned to Email" and has a text field containing the word "Text". The third row is labeled "Text" and has a text field containing the word "Text". To the right of the form is a "Field - Text" properties box. This box has tabs for "Edit", "Event", and "Add". The "Edit" tab is active. The properties include: "Field Name" (Assigned Date), "Field Type" (Text), "Theme" (-Default-), "Input Mask" (None), "User Mode Help" (Add), "Field Size" (200), and several checkboxes: "Required", "Calculated", "Visibility Control", "Editability/Enable Control", "User Input Validation", and "Set Default Value". The "Display Order" is set to 2. At the bottom, there is a "Location:" section with a "Tab" dropdown set to "Invoice Processing" and buttons for "Save", "Reset", and "Delete".

4. In the Properties Box click in the Field Name and type Assigned Date
5. Click Save.



❖ Create Button Field Named Assign



✓ Drag and drop a Button field into the Assign section.

1. In the properties box click in Field Name and type Assign
2. Click Save.



❖ Name the Button Field.

The screenshot displays a software interface for editing a form. The main area has a green background and contains the following elements:

- Top left: "Invoice: Edit", "Description:", "Unique Keys:", "Buttons Visibility:", "Default Mode: Read Mode".
- Top center: "Delete Form" and "Close" buttons.
- Below the green area: "Invoice Submission Info" and "Invoice Processing" tabs.
- Below the tabs: "tab Column 1".
- Main form area (highlighted with a blue border):
 - Section header: "Assign" (with a minus sign icon).
 - Field: "Assigned to" with a text input field and a dropdown menu.
 - Field: "Assigned to Email" with a text input field containing the word "Text".
 - Field: "Assigned Date" with a text input field containing the word "Text".
 - Bottom bar (yellow background): "Assign" button.
- Right panel: "Field - Assign" with tabs for "Edit", "Event", and "Add". Under the "Event" tab, there is an "Add New Event" button.
- Top right: "Toolbox" dropdown menu.
- Bottom right: A trash can icon.

1. Click on the *Events*.
2. Click Add New Event.



❖ Making the button assign date

1. Select Set Value from the Action dropdown menu.
2. Select "Assigned Date" from the field dropdown menu.
3. Click Formula Builder next to the Value text box.
4. Enter the following formula: *Today()*
5. Click Add.
6. Click Save.



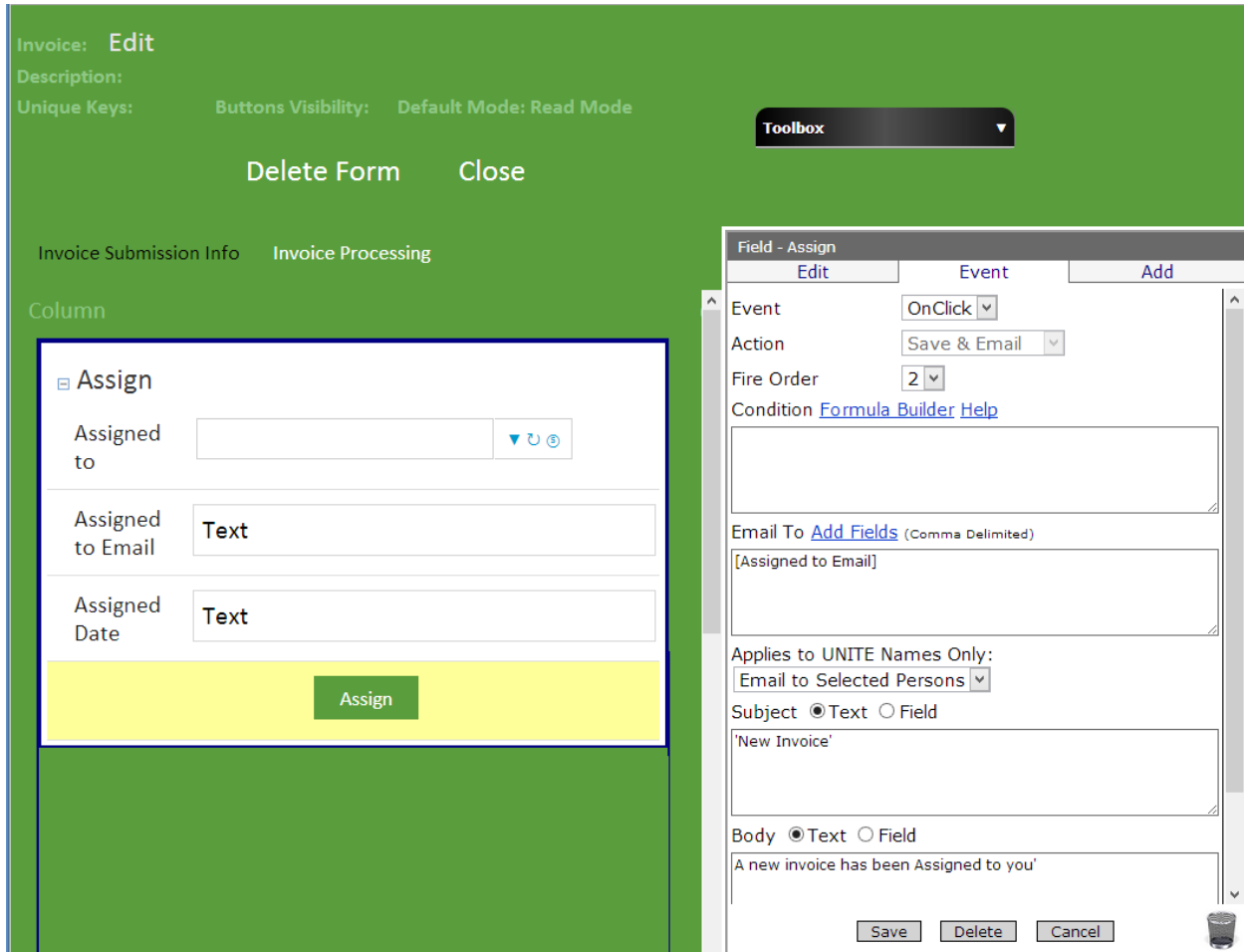
❖ Rename the Tab Column 1 into Column

The screenshot shows the 'Invoice Processing' tab in the WAG interface. The 'Assign' section is active, displaying fields for 'Assigned to', 'Assigned to Email', and 'Assigned Date', each with a 'Text' input field. A green 'Assign' button is located at the bottom of this section. On the right, the 'Column - Tab Column 1' properties dialog box is open. It has 'Edit' and 'Add' buttons at the top. The 'Column Name' field is highlighted and contains the text 'Column'. Other fields include 'Column Width' (50%), 'Display Order' (0), and checkboxes for 'Visibility Control' and 'Editability/Enable Control'. The 'Location' section shows 'Tab' set to 'Invoice Processing'. At the bottom of the dialog are 'Save', 'Reset', and 'Delete' buttons, along with a trash icon.

1. Click on the Tab Column 1
2. Click In the Column name in the properties Box
3. Click Save



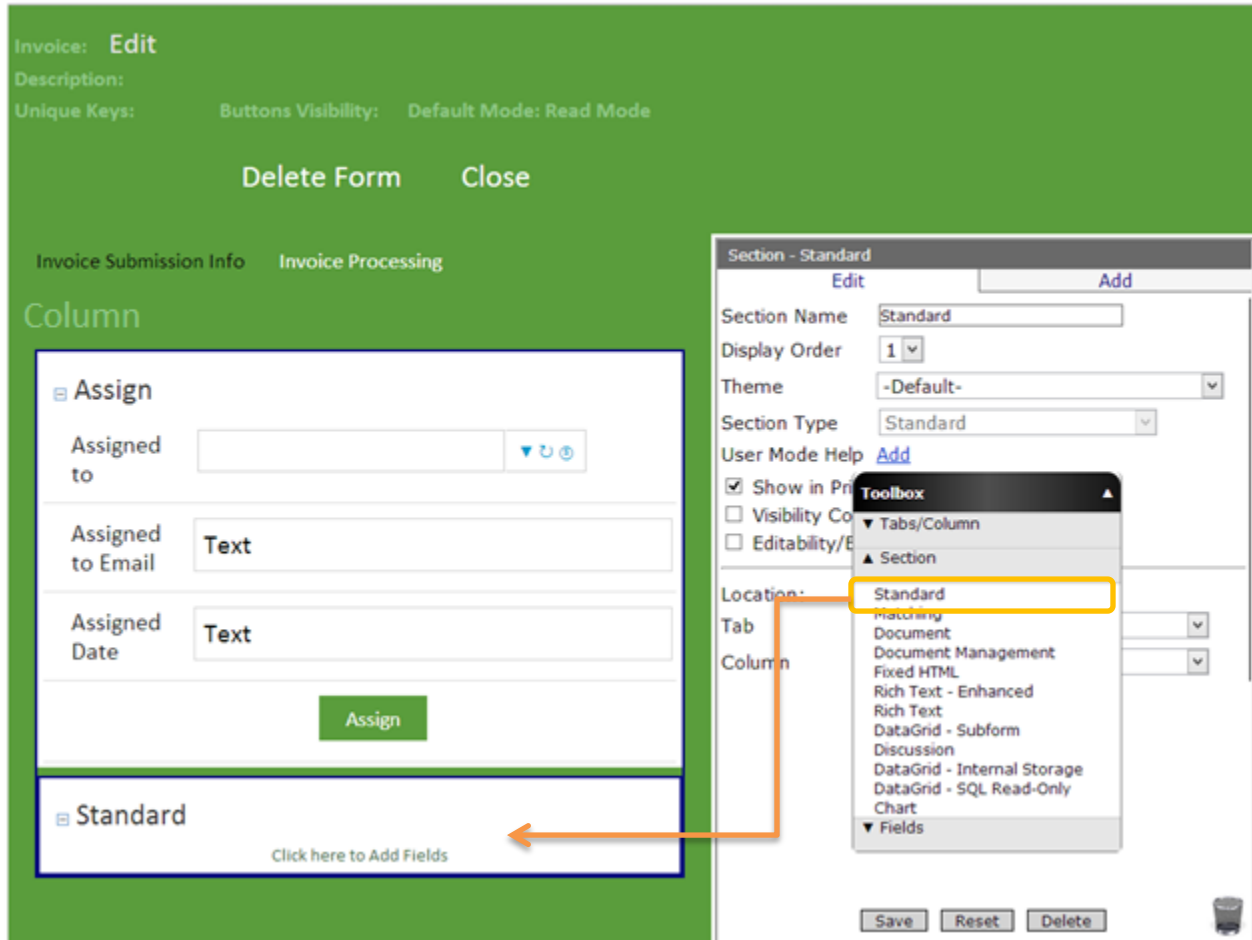
- ❖ Making the button send E-mail on click.



1. Click Add New Event.
2. Select *Save & Email* from the *Action* dropdown menu.
3. Click "Add Fields" next to the Email To textbox.
4. Select *Assigned To Email*
5. Click OK
6. Type *New invoice* in the Subject text box.
7. Type *A new invoice has been assigned to you*' in the Body text box.
8. Check *Include link to record*
9. Click Save.



❖ Create New Section Named Approval



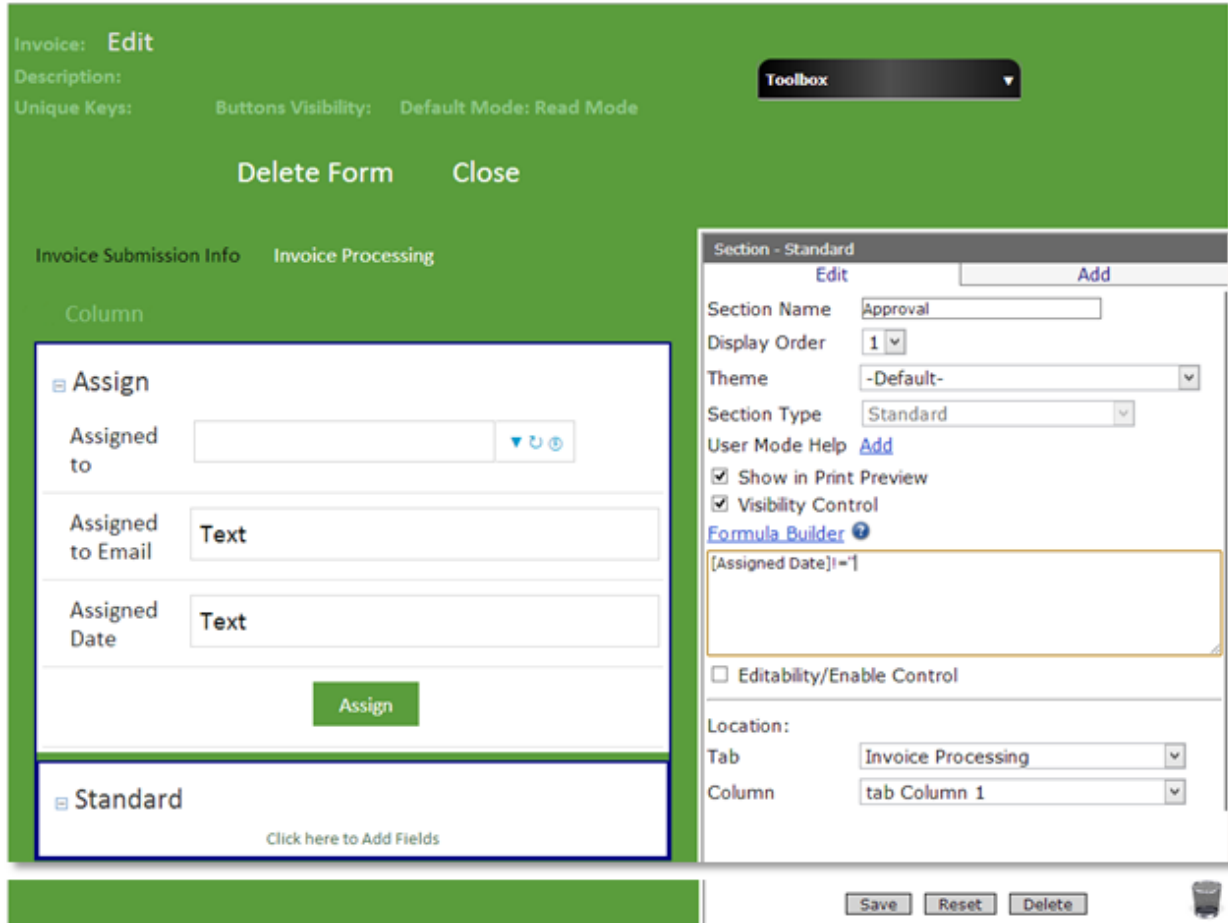
Approval Section

Having made a section by which the invoice can be assigned to an accountant, we will now make the sections that the accountant will use to process the invoice.

- ✓ Drag and drop a Standard section into the form.



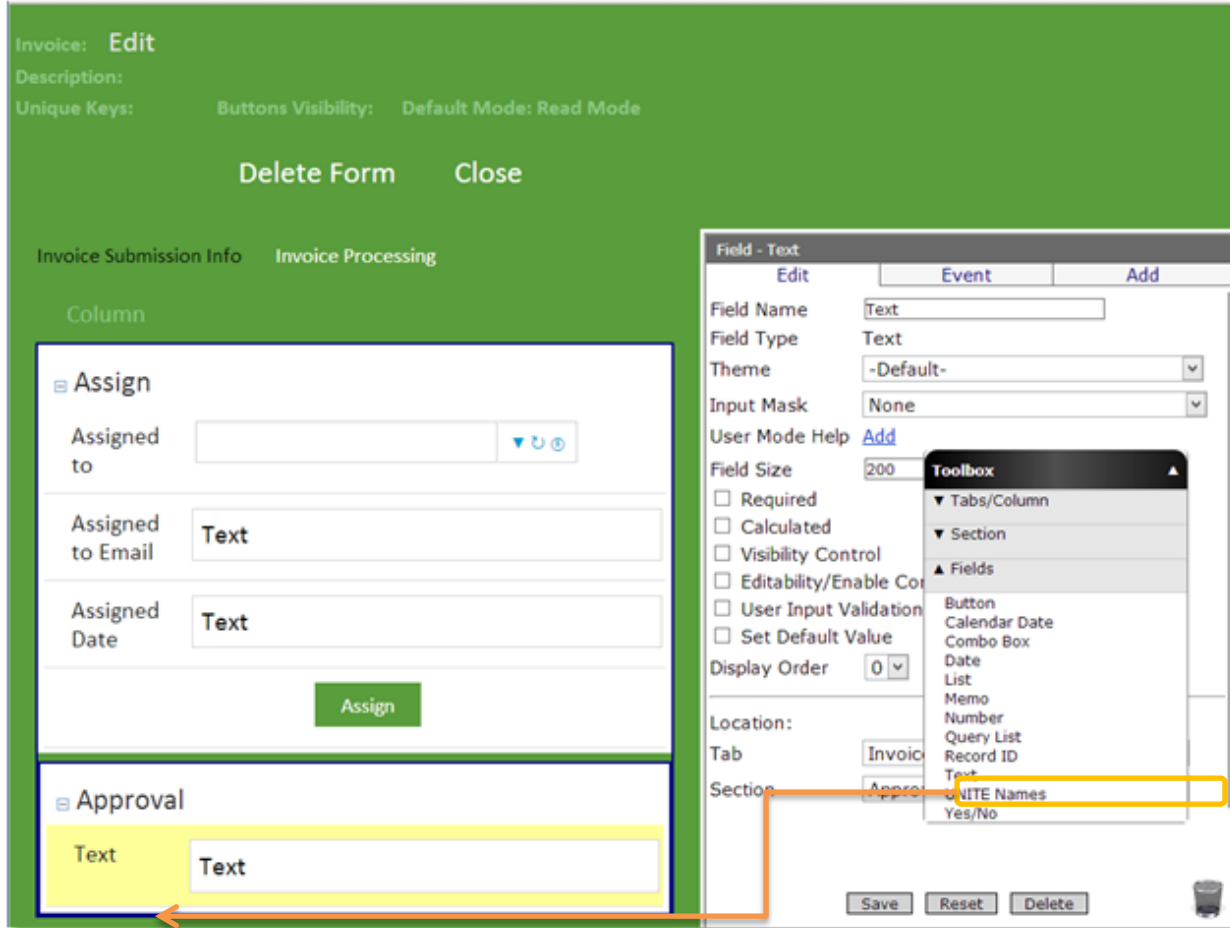
❖ Name the new Section



1. In the properties box click on *Section Name* and type *Approval*
2. Since we only want this section to be used after the invoice has been assigned to an accountant we will make it visible only after the assign fields have been entered.
3. Check *Visibility Control*
4. Click *Formula Builder* and enter the following formula:
[Assigned Date] != ''
5. Click *Ok*
6. Click *Save*.



❖ Create a Text Field Named Check Number



✓ Drag and drop a text field from the toolbox into the Approval section.

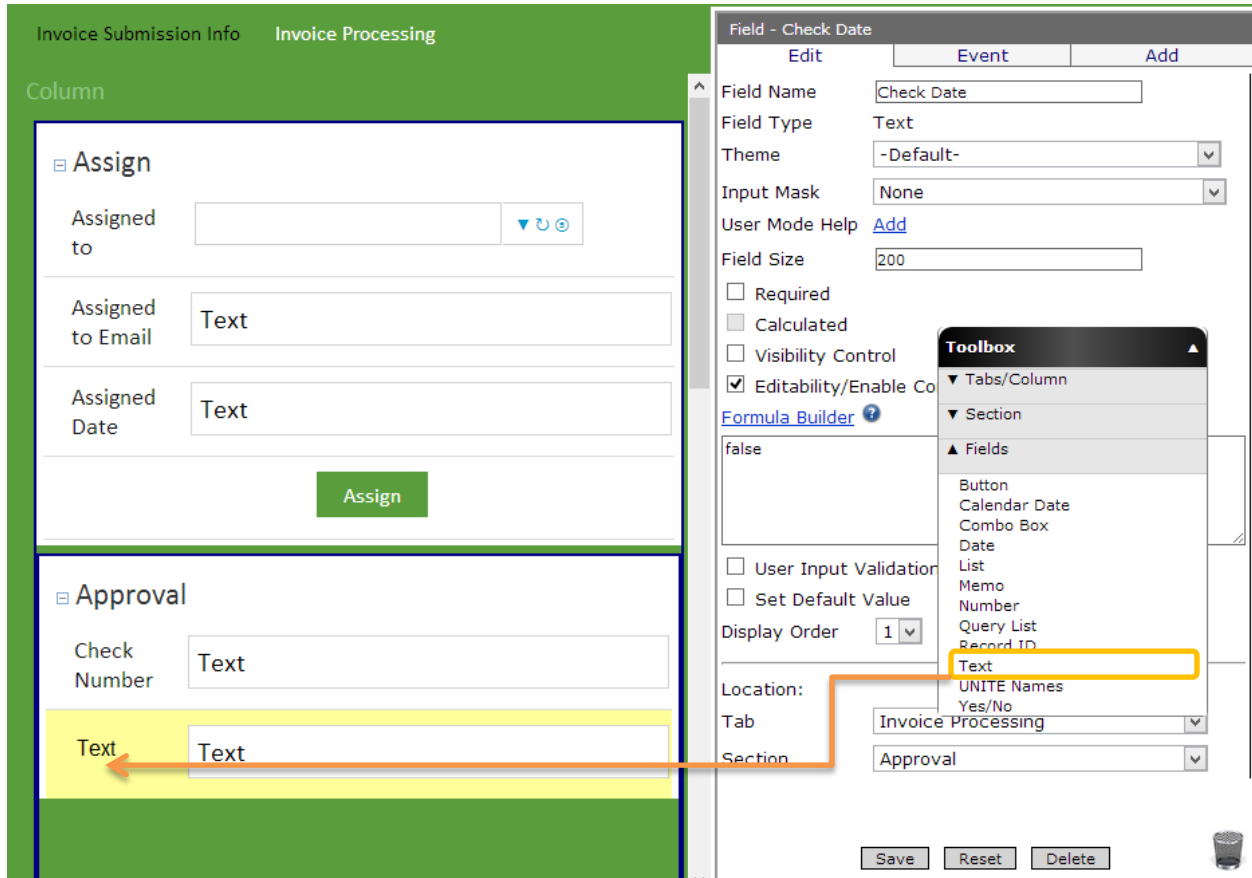


❖ Name and The text Field.

1. Name this field "Check Number"
2. Click Save.



❖ Create a Text Field Named Check Date



✓ Drag and drop a Text field from the Toolbox into the Approval section.

1. Name the text field
2. In the properties box click in Field Name and type *Check Date*
3. Check Editability/Enable Control and make sure the formula box shows *false*
4. Click Save.



❖ Create A Button Named Approved-Submit Check

Invoice: **Edit**
Description:
Unique Keys: Buttons Visibility: Default Mode: Read Mode **Toolbox** ▼

Delete Form **Close**

Invoice Submission Info Invoice Processing

Assigned to Email Text
Assigned Date Text
Assign

Approval
Check Number Text
Check Date Text
Button

Field - Button
Edit Event Add

Field Name Approved- Submit Check
Field Type Button
Theme -Default-
User Mode Help Add
Button Group Name
Button Order in Group
Make Button Available:
 Edit Mode Read Mode View Mode
 Visibility Control
 Editability/Enable Control
Display Order 2 ▼
Location:
Tab Invoice Processing ▼
Section Approval ▼
Save **Reset** **Delete**

1. Drag and drop a Button field from the Toolbox into the Approval section.
2. Name this Button Approved – Submit Check



❖ Creating the button Approved – Submit Check

The screenshot shows the WAG interface with a green header. At the top, it says "Invoice: Edit" and "Description:". Below that, there are fields for "Unique Keys:", "Buttons Visibility:", and "Default Mode: Read Mode". A "Toolbox" dropdown menu is visible. In the center, there are buttons for "Delete Form" and "Close". Below this, there are tabs for "Invoice Submission Info" and "Invoice Processing". The "Invoice Submission Info" tab is active, showing fields for "Assigned to Email" and "Assigned Date", both labeled "Text". There is an "Assign" button below these fields. The "Invoice Processing" tab is also visible, showing a section for "Approval" with fields for "Check Number" and "Check Date", both labeled "Text". At the bottom of the "Approval" section, there is a yellow highlighted area with a green button labeled "Approved- Submit Check". On the right side, a modal window titled "Field - Approved- Submit Check" is open, showing tabs for "Edit", "Event", and "Add". The "Event" tab is selected, and there is an "Add New Event" button.

1. Click Add New Event.



Invoice: **Edit**
Description:
Unique Keys: Buttons Visibility: Default Mode: Read Mode **Toolbox** ▼

Delete Form **Close**

Invoice Submission Info Invoice Processing

Assigned to Email Text

Assigned Date Text

Assign

Approval

Check Number Text

Check Date Text

Approved- Submit Check

Field - Approved- Submit Check

Edit **Event** **Add**

Event **OnClick** ▼

Action **Set Value** ▼

Condition [Formula Builder Help](#)

Field

Check Date ▼

Value [Formula Builder Help](#)

Today()

Add **Cancel**

2. In the **Action** choose set Value From the Drop Down List
3. In the **Field** Choose Check Date from the drop down list
4. In the Value Formula box type
Today()
5. *Click Add*



1. In the **Action** choose set Value From the Drop Down List
 2. In the **Field** Choose Invoice Approved
 3. In the Value Formula box type
'Yes'
 4. *Click Add*
- ✓ Since this button will essentially complete the invoice process, it will do a multitude of things. Namely, it will assign completion notices, set dates and email the vendor.
 - ✓ Since this button will deal with a few different forms, we will return to it after constructing other sections.



❖ Change column width

The screenshot shows a software interface with a green header bar containing "Delete Form" and "Close". Below the header, there are two tabs: "Invoice Submission Info" and "Invoice Processing". The "Invoice Processing" tab is active, showing a form with the following fields: "Assigned Date" (Text), "Check Number" (Text), and "Check Date" (Text). There are two buttons: "Assign" and "Approved -Submit Check".

Overlaid on the right side is a "Column - tab Column 1" properties box. It has "Edit" and "Add" buttons. The fields in the box are: "Column Name" (text input with "Column" entered), "Column Width" (text input with "50%" entered, followed by "% or px"), "Display Order" (dropdown menu with "0" selected), and two checkboxes: "Visibility Control" and "Editability/Enable Control". Below these is a "Location:" section with a "Tab" dropdown menu set to "Invoice Processing". At the bottom of the box are "Save", "Reset", and "Delete" buttons, and a trash can icon.

1. In the Properties Box Click on Column Name and type Column
2. In the Column width type 50%
3. Click Save



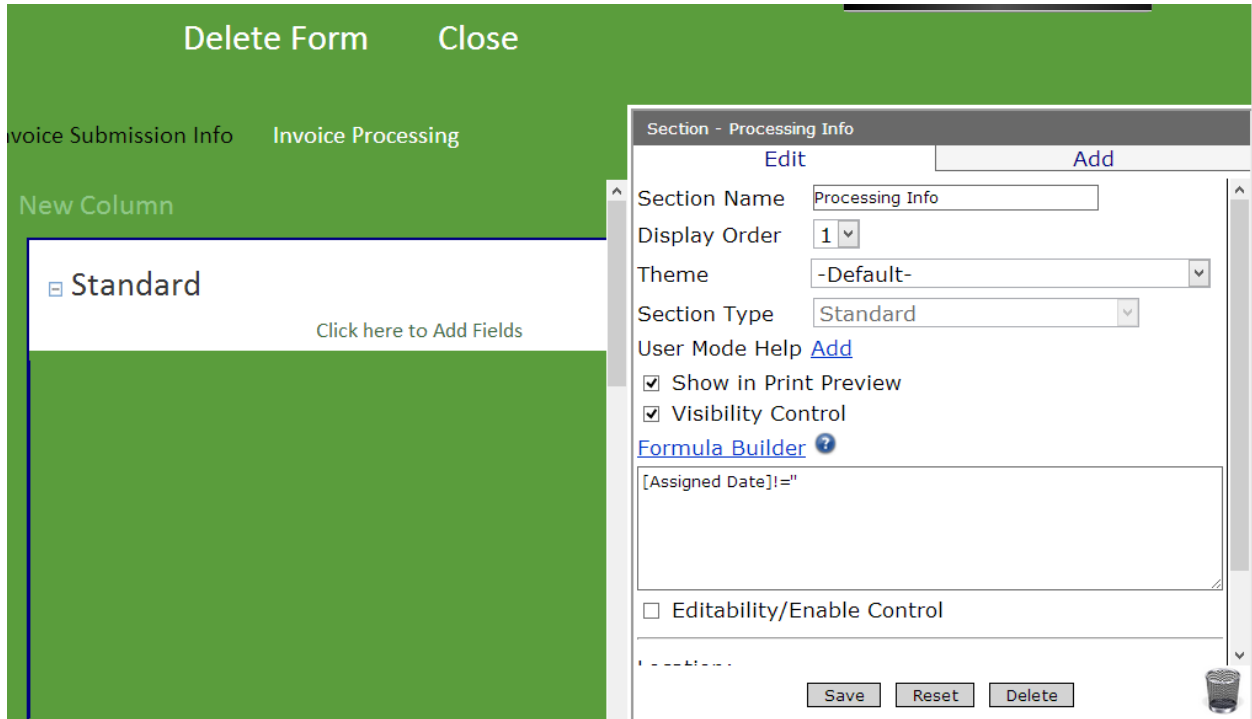
❖ Create New Column Named New Column

The screenshot displays the WAG interface for editing an invoice. At the top, there are options for 'Delete Form' and 'Close'. Below this, there are tabs for 'Invoice Submission Info' and 'Invoice Processing'. A 'Column' configuration panel is open, showing an 'Assign' section with fields for 'Assigned to', 'Assigned to Email', and 'Assigned Date'. A 'Toolbox' is overlaid on the interface, with 'Column' selected and highlighted by a yellow box. An orange arrow points from the 'Column' item in the toolbox to a 'Click here to add sections' area. To the right, a configuration panel for 'Column - Column 1' is visible, showing settings for 'Column Name' (New Column), 'Column Width' (50%), 'Display Order' (1), and 'Location' (Invoice Processing). Buttons for 'Save', 'Reset', and 'Delete' are at the bottom.

- ✓ Drag And Drop a new Column from the Toolbox next to the other Column.



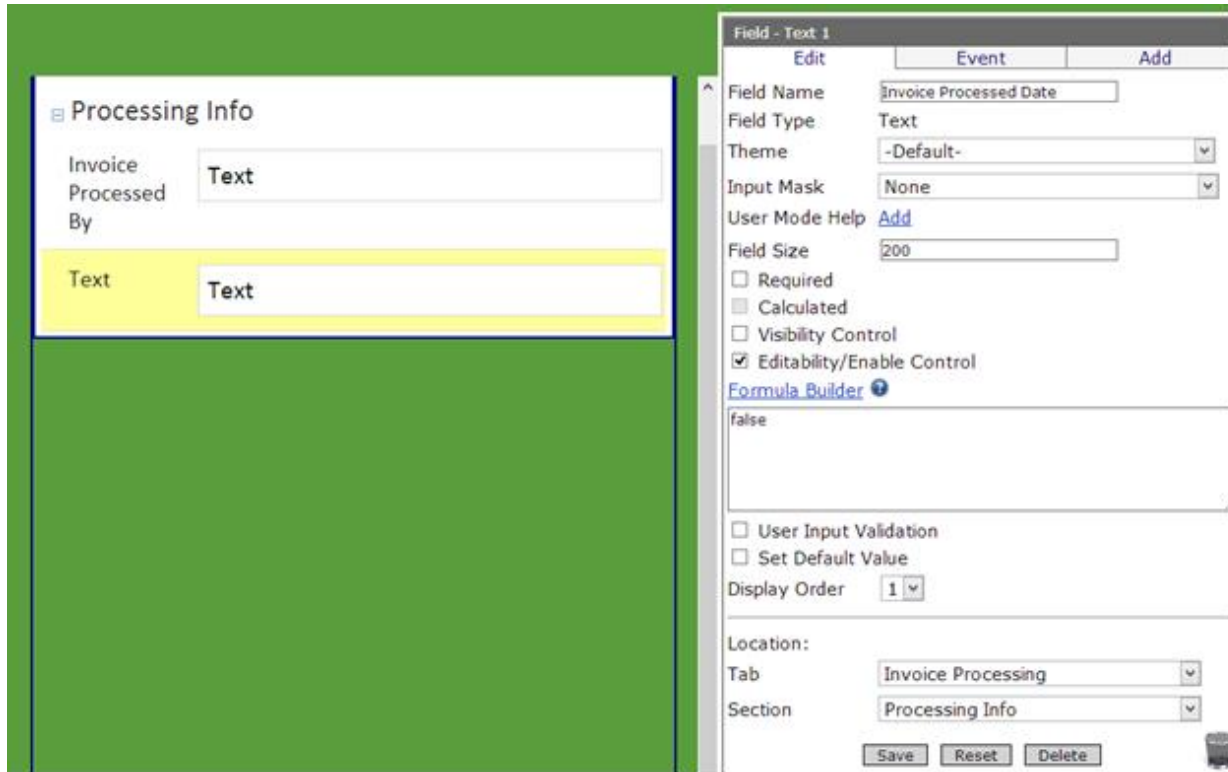
- ❖ Name the new column Processing Info



- 1) In the Properties Box click on Section Name and type *Processing Info*.
 - 2) Check the box next to Visibility Control and in the formula box put
[Assigned Date]!=""
- ✓ This formula is to record the date the invoice was completed



❖ Creating text fields named Invoice Processed by and Invoice Processed Date



✓ Drag and drop a Text field from the Toolbox into the Processing Info Section

1. In the properties box click in the Field Name and type Invoice Processed By

2. Click Save

✓ Drag and drop a Text field from the Toolbox into the Processing Info Section

1. In the properties box click in the Field Name and type Invoice Processed Date

2. Check the box Editability/Enable control and make sure the formula box shows *false*

3. Click Save.

❖ Continue creating the Approved-Submit Check button



Invoice: **Edit**
Description:
Unique Keys: Buttons Visibility: Default Mode: Read Mode

Delete Form **Close**

Invoice Submission Info Invoice Processing

Assigned Date

Assign

Approval

Check Number

Check Date

Approved- Submit Check

Field - Approved- Submit Check

Edit **Event** **Add**

Event

Action

Condition [Formula Builder Help](#)

Field

Value [Formula Builder Help](#)

Add **Cancel**

1. Click *Add New Event*
2. Select *Set Value* from the Action dropdown menu
3. Select *Invoice Processed Date* from the Field dropdown menu
4. Click Formula Builder next to the *Value* and in the formula box and enter the following formula: *Today()*
5. Click Ok
6. Click Save.



Invoice: **Edit**
Description:
Unique Keys: Buttons Visibility: Default Mode: Read Mode

Delete Form **Close**

Invoice Submission Info Invoice Processing

Assigned Date

Assign

Approval

Check Number

Check Date

Approved- Submit Check

Field - Approved- Submit Check

Edit **Event** **Add**

Event

Action

Condition [Formula Builder Help](#)

Field

Value [Formula Builder Help](#)

`[Assigned To].[Last Name] + ' ' + [Assigned To].[First Name]`

Add **Cancel**

1. Click *Add New Event*
2. Select *Set Value* from the **Action** dropdown menu
3. Select *Invoice Processed By* from the Field dropdown menu
4. Click Formula Builder next to the Value text box and enter the following formula:
[Assigned To].[Last Name] + ' ' + [Assigned To].[First Name]
5. Click **OK**.
6. Click **Save**.

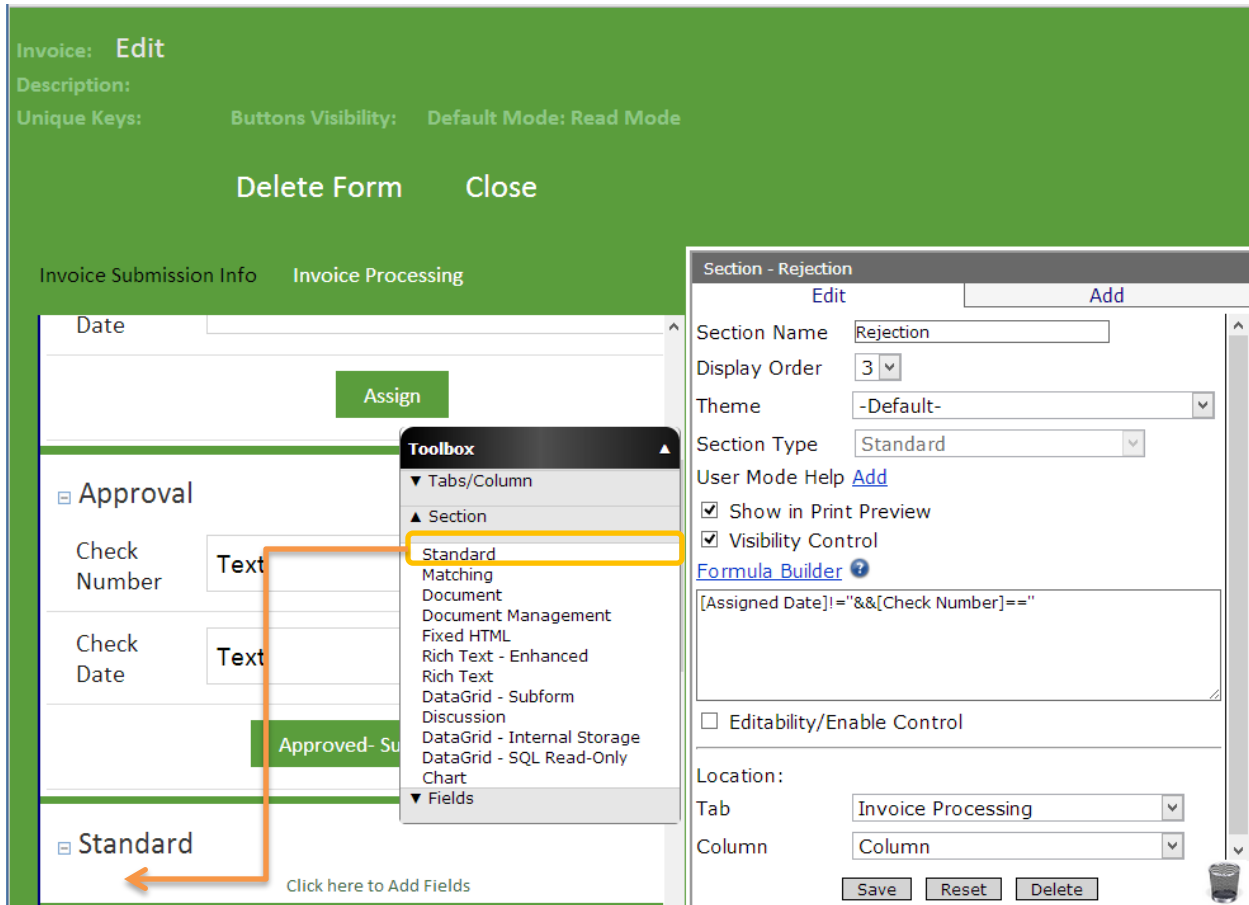


The screenshot shows the 'Invoice: Edit' interface with the 'Invoice Processing' tab selected. The main form has fields for 'Assigned to Email' and 'Assigned Date', both set to 'Text'. Below these is an 'Assign' button. The 'Approval' section has 'Check Number' and 'Check Date' fields, both set to 'Text', and an 'Approved- Submit Check' button. A dialog box titled 'Field - Approved- Submit Check' is open, showing configuration options: Event (OnClick), Action (Save & Email), Condition (Formula Builder Help), Email To (Add Fields, Comma Delimited) with '[Vendor Email]' entered, Applies to UNITE Names Only (Email to Selected Persons), Subject (Text selected) with 'Your invoice has been processed' entered, Body (Field selected) with 'Check Number' selected in the dropdown, and 'Include link to record' checked. 'Add' and 'Cancel' buttons are at the bottom of the dialog.

1. Click *Add New Event*
2. Select "Save & Email" from the Action dropdown menu.
3. Click on *Add Fields* next to the **Email To** formula box.
4. Select *[Vendor Email]*
5. Type *your invoice has been processed*. In the Subject text box
6. Click Field next to the Body text box.
7. Select *Check Number* from the dropdown menu.
8. Check *Include link to record*
9. Click Save.



❖ Create a Standard Section named Rejection

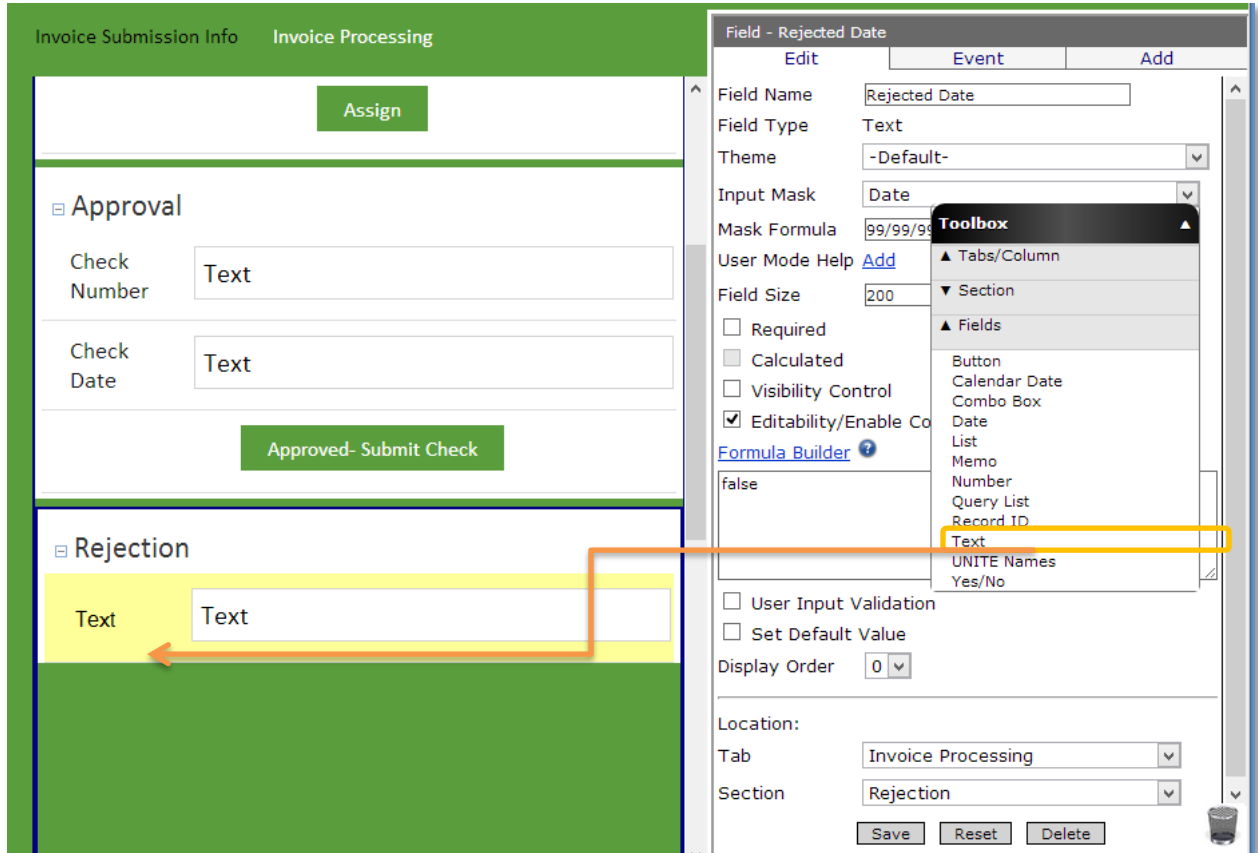


✓ Drag and drop Standard Section from the Toolbox beneath the Approved-Submit check button

1. In the properties box, click in to the Section Name and type Rejection in it.
2. Check the box Visibility Control, click on **Formula Builder** Select *[Assigned Date]!="&&[Check number]=="*
3. Click Save.



❖ Create text field named Rejected Date

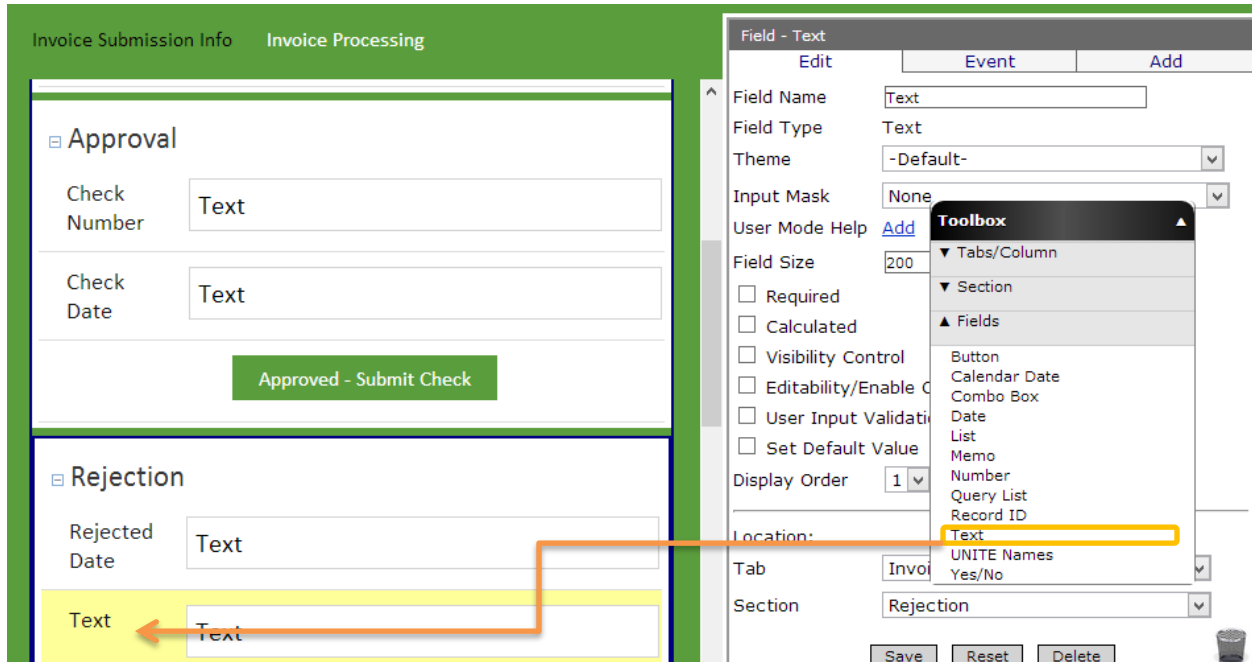


❖ Drag and drop a Text Field from the toolbox in the beneath the rejection section.

1. In the Properties Box click in Field Name and type Rejected Date in it
2. Click Editability/Enable control and make sure the formula *false* is there
3. Click Save.



- ❖ Create text field named Rejected Reason



- ✓ Drag and drop a Text Field from the toolbox in the beneath the rejection date field

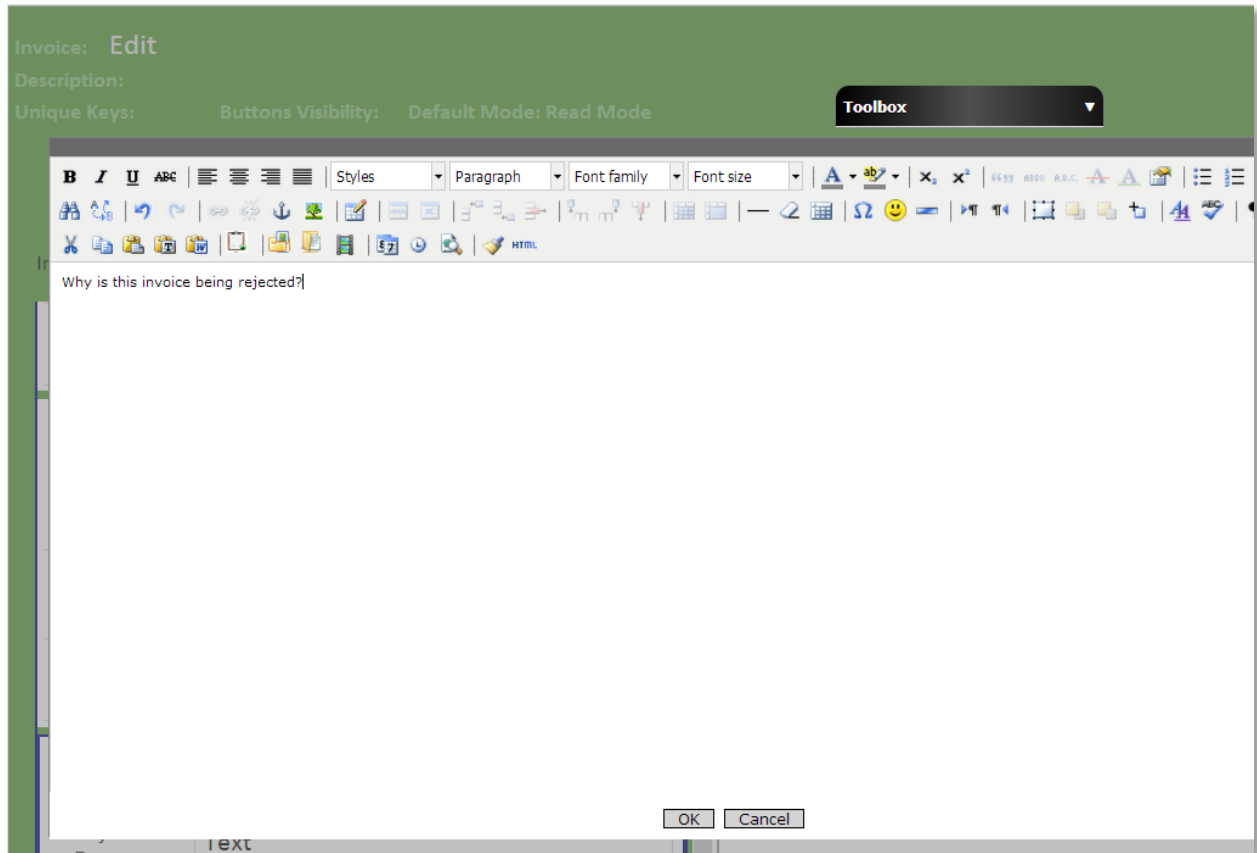


❖ Name the text field

The screenshot shows a software interface for editing an invoice. At the top, it says "Invoice: Edit" and "Description:". Below that, there are options for "Unique Keys:", "Buttons Visibility:", and "Default Mode: Read Mode". A "Toolbox" dropdown is visible. The main area has "Delete Form" and "Close" buttons. There are two tabs: "Invoice Submission Info" and "Invoice Processing". Under "Invoice Submission Info", there is an "Assign" button. Under "Invoice Processing", there are two sections: "Approval" and "Rejection". The "Approval" section has "Check Number" and "Check Date" text fields. The "Rejection" section has "Rejected Date" and a text field highlighted in yellow. A "Field - Text" properties box is open on the right, showing "Field Name" set to "Rejected Reason", "Field Type" set to "Text", "Theme" set to "-Default-", "Input Mask" set to "None", "User Mode Help" set to "Add", "Field Size" set to "200", and "Display Order" set to "1". There are also checkboxes for "Required", "Calculated", "Visibility Control", "Editability/Enable Control", "User Input Validation", and "Set Default Value". The "Location:" section shows "Tab" set to "Invoice Processing" and "Section" set to "Rejection". At the bottom of the properties box are "Save", "Reset", and "Delete" buttons.

1. In the Properties Box click in Field Name and type Rejected Reason in it.

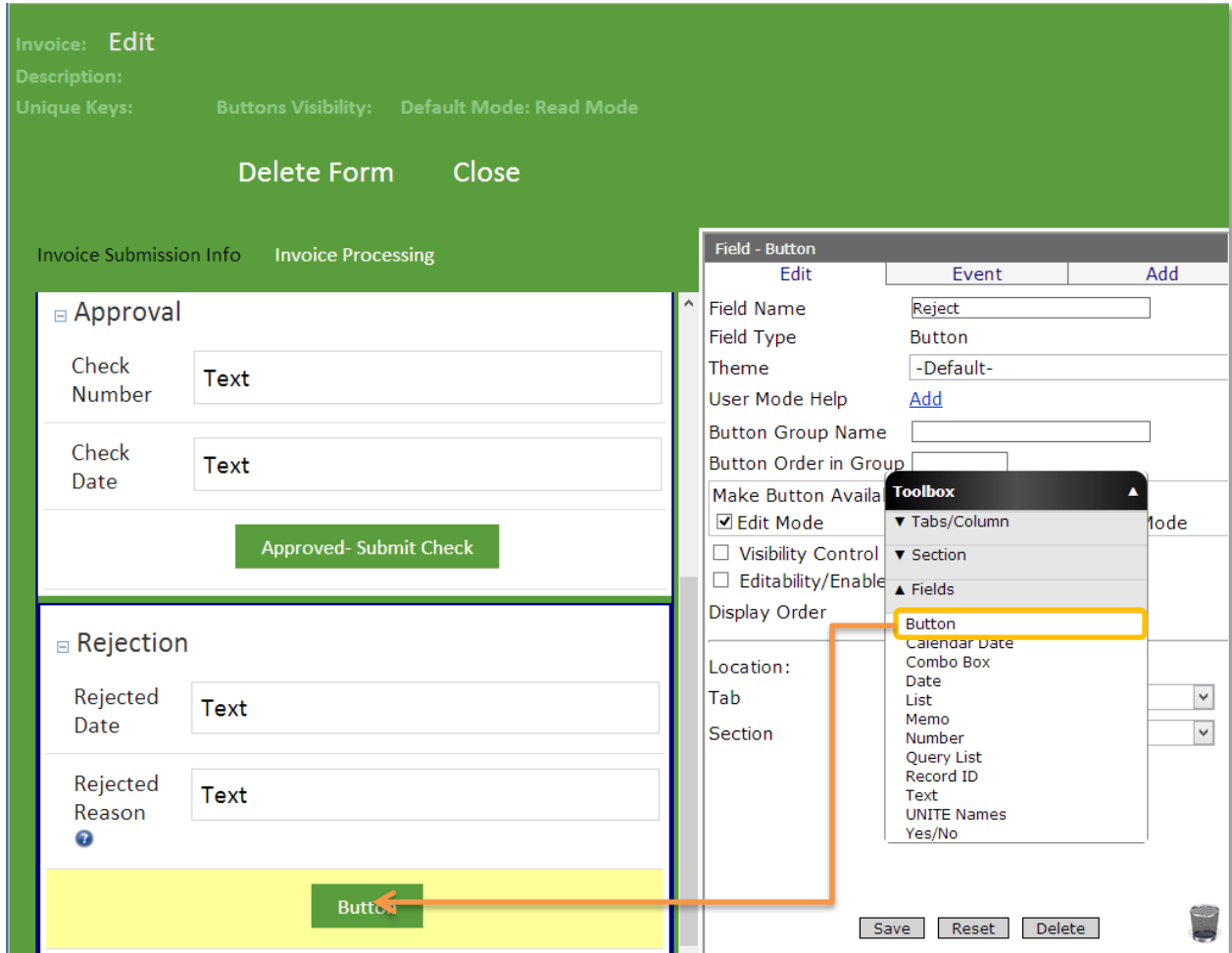
2. Click User Mode Help



2. Type: *Why is this invoice being rejected*
 3. Click OK.
- ❖ This is to create a Help button to find out the reason of rejection. *Help will appear as a little question mark on the blue circle under the Rejected Reason field*



❖ Create Button named Reject

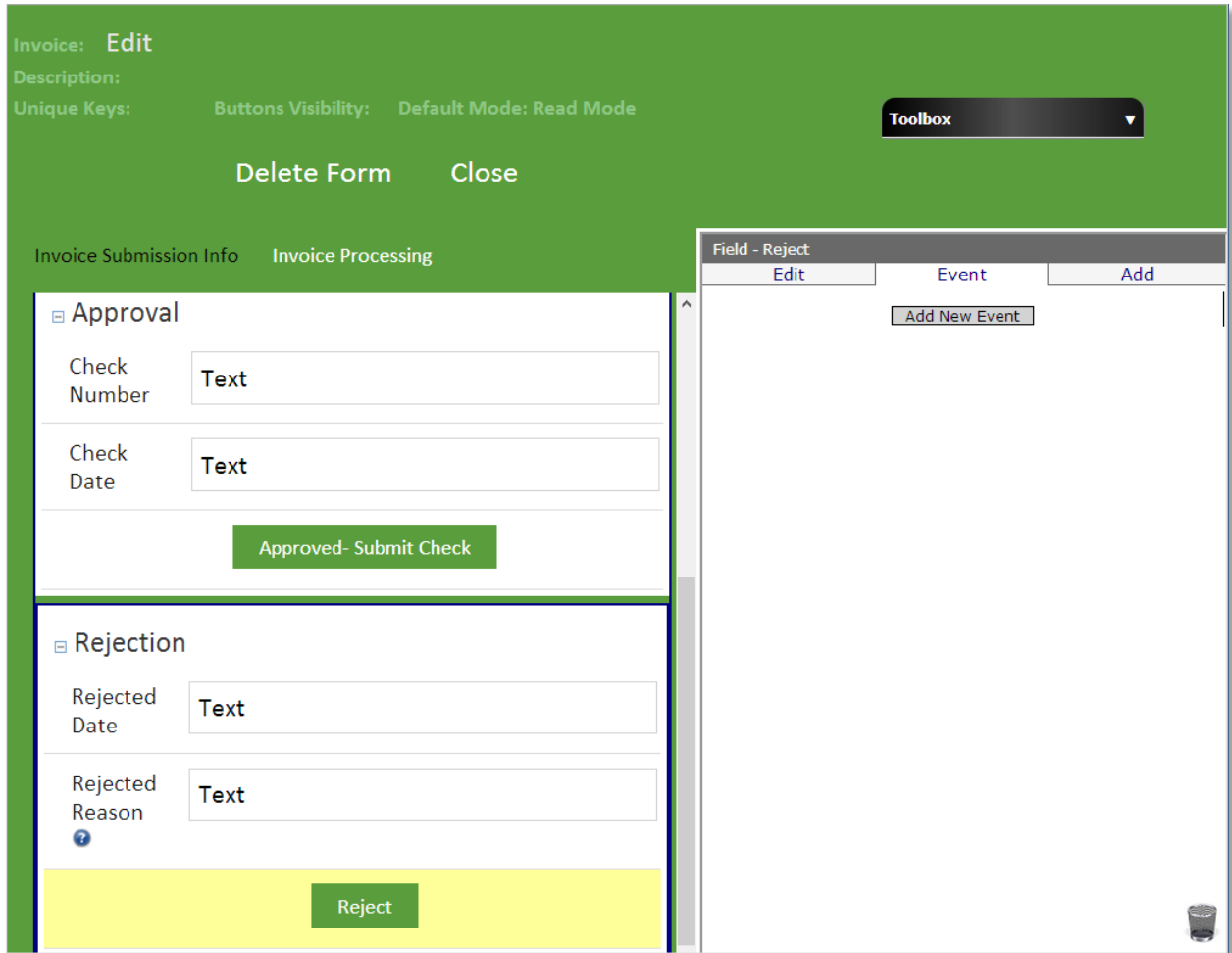


❖ Drag and drop a button field from the toolbox under the Rejected Reason Field

1. In the Properties box click on field Name called and type Reject in
2. Click Save.
3. Click **Event** on the top of the properties box



❖ Creating the button



1. Click on Add New Event

The button will send emails to the persons tagged in it. For that we will be adding on-click events to the button, however before doing that we need to create a Management Section and get back to the button later. The following screens will demonstrate described above.



❖ Create Section Named Management

The screenshot displays the 'Invoice: Edit' interface. At the top, there are buttons for 'Delete Form' and 'Close'. Below this, there are tabs for 'Invoice Submission Info' and 'Invoice Processing'. The 'Invoice Submission Info' tab contains a 'Check Date' field with a 'Text' type and an 'Approved- Submit Check' button. The 'Invoice Processing' tab contains a 'Rejection' section with 'Rejected Date' and 'Rejected Reason' fields, both with 'Text' types, and a 'Reject' button. Below the 'Reject' button is a 'Standard' section with a 'Click here to Add Fields' link. An orange arrow points from the 'Standard' section in the main form to the 'Standard' section in the 'Section - Standard' dialog box. The dialog box shows configuration options for a section, including 'Section Name', 'Display Order', 'Theme', 'Section Type', and 'User Mode Help'. A 'Toolbox' is open, showing a list of sections and fields. The 'Standard' section is highlighted in the toolbox, and an orange arrow points from it to the 'Standard' section in the main form.

- ✓ Drag and drop a Standard Section from the toolbox beneath the **Reject** button



❖ Name the Section

The screenshot shows the WAG interface for editing an invoice. At the top, there's a green header with 'Invoice: Edit', 'Description:', 'Unique Keys:', 'Buttons Visibility:', and 'Default Mode: Read Mode'. A 'Toolbox' dropdown is on the right. Below the header are 'Delete Form' and 'Close' buttons. The main content area has two tabs: 'Invoice Submission Info' and 'Invoice Processing'. Under 'Invoice Processing', there's a 'Rejection' section with two text fields: 'Rejected Date' and 'Rejected Reason'. A 'Reject' button is below these fields. At the bottom, there's a 'Standard' section with a 'Click here to Add Fields' link. A properties box for the 'Rejection' section is open on the right, showing fields for 'Section Name' (Management), 'Display Order' (3), 'Theme' (-Default-), 'Section Type' (Standard), and 'User Mode Help' (Add). It also has checkboxes for 'Show in Print Preview' (checked), 'Visibility Control' (unchecked), and 'Editability/Enable Control' (unchecked). The 'Location' section has 'Tab' (Invoice Processing) and 'Column' (Column) dropdowns. At the bottom of the properties box are 'Save', 'Reset', and 'Delete' buttons, along with a trash icon.

- 1) In the Properties Box, click in Section name and type Management
- 2) Check the box next to visibility control and make sure the formula box displays false.
- 3) Click Save.

❖ Create Text Field named Rejected Email Body

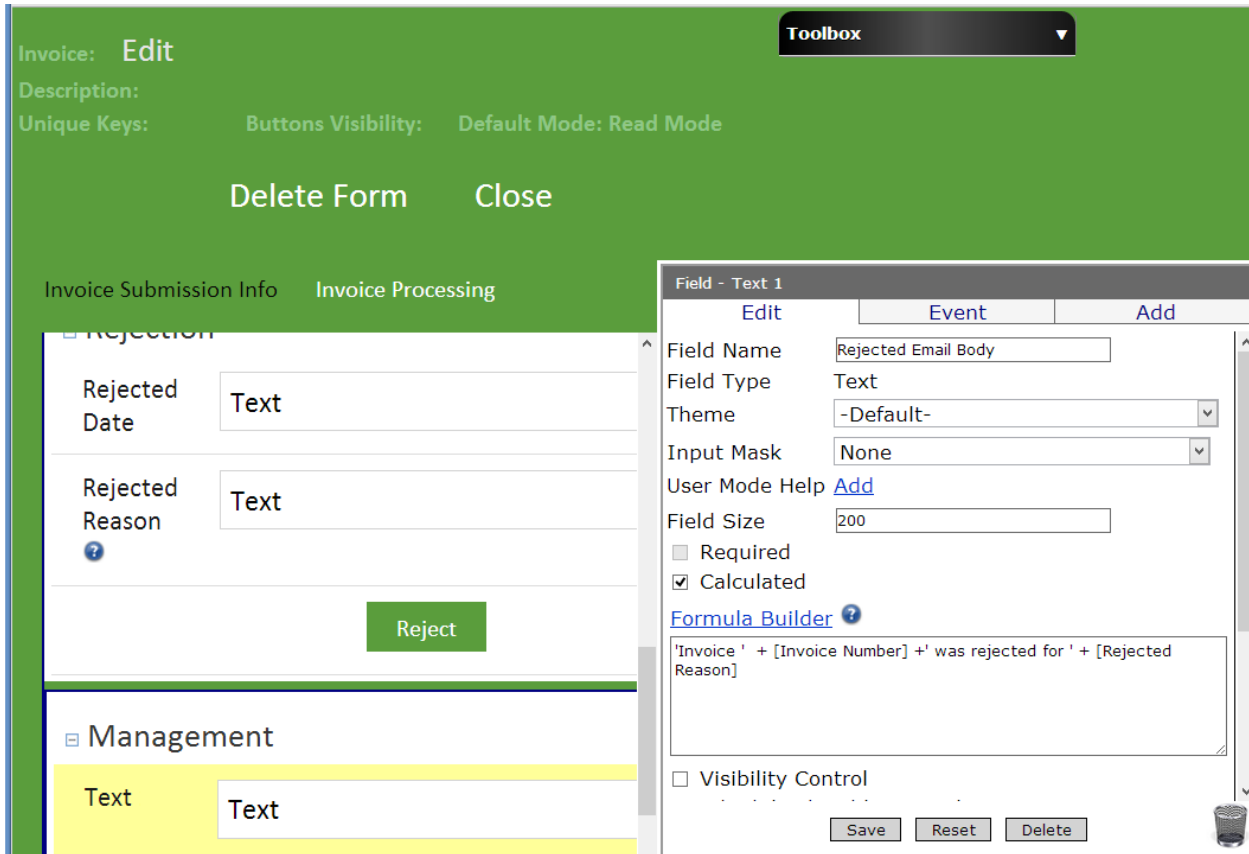


The screenshot shows the WAG software interface for editing an invoice form. The top bar is green and contains the text "Invoice: Edit", "Description:", "Unique Keys:", "Buttons Visibility:", and "Default Mode: Read Mode". Below this are buttons for "Delete Form" and "Close". The main area is divided into "Invoice Submission Info" and "Invoice Processing". The "Rejection" section contains fields for "Rejected Date" and "Rejected Reason", both labeled "Text", and a "Reject" button. The "Management" section is highlighted in yellow and contains two "Text" fields. A configuration window titled "Field - Text 1" is open, showing various settings like "Field Name", "Field Type", "Theme", "Input Mask", "User Mode Help", "Field Size", and "Display Order". A "Toolbox" is visible within this window, listing various field types such as "Button", "Calendar Date", "Combo Box", "Date", "List", "Memo", "Number", "Query List", "Record ID", "Text", "UNITE Names", and "Yes/No". The "Text" field in the toolbox is highlighted with a yellow box, and an orange arrow points from it to the "Text" field in the "Management" section.

- ✓ Drag and drop a text field from the toolbox in the Management section.



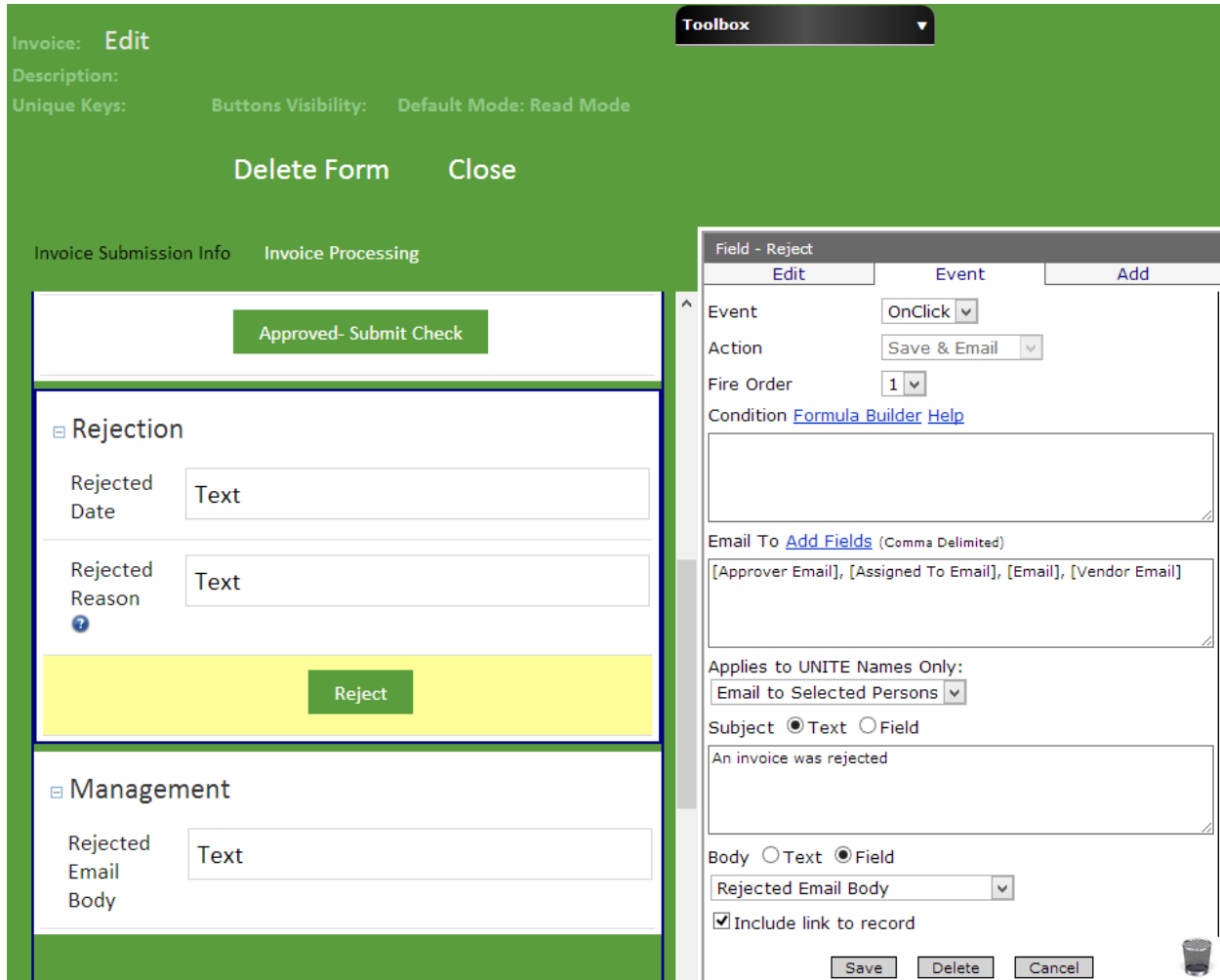
❖ Name the Text field



1. In the Properties box click on Field Name and type Rejected Email body.
2. Check Calculated click on **Formula Builder** and choose *'Invoice ' + [Invoice Number] +" was rejected for ' + [Rejected Reason]*
3. Click ok,
4. Click Save



❖ Continue creating the Reject Button



Click on Reject Button

1. Click on Event
2. Click Add New Event
3. In the Action drop down list choose Save & Email
4. Click Add Fields next to Email to and choose

[Approver Email], [Assigned To Email], [Email], [Vendor Email]

5. In the Subject box type *An invoice was rejected*
6. Next to Body click Rejected Email Body
7. Check box next to *Include link to record*.
8. Click Save

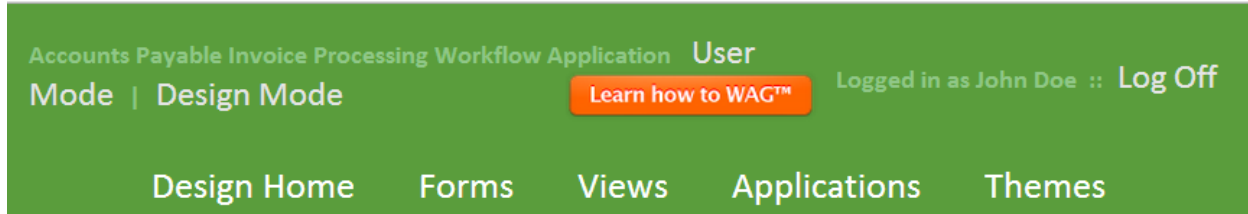


❖ Continue creating the Reject Button

1. Click **Add New Event**
2. In the **Action** drop down list choose **Set Value**
3. In the **Field** drop down list select **Rejected Date**
4. In the **Value** formula box select **Today()**
5. Click **Add**
6. Click **Close**



❖ Creating Views



Views [Add a New View](#)

We will create views to see the invoices we have created and where they are in the process. To this effect, we can filter which invoices appear in which views by manipulating the view definition. There will be five separate views:

- All Invoices
- Completed Invoices
- Invoices Awaiting Project Manager Review
- Invoices in Accounting Queue
- Invoices Waiting for Department Approver

✓ In the Design mode click on views and click on Add a New View.

As Shown on the screen below

1. Type "All Invoices" in the View Name text box
2. Select Invoices from the Type dropdown menu
3. Select all the fields under the "Show in View" and "Searchable" check boxes
4. Select Invoice Number as default search.
5. Click Save.



Design Home Forms Views Applications Themes

Save Cancel

View Name: All Invoices

Type: Invoice

Extra Information Show Type Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions

Default View:

Field Name	Show in View	Searchable	Default Search
Invoice Submission Info			
Invoice Details			
Invoice			
Invoice Number*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Payment Due Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Vendor Info			
Vendor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Vendor Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Vendor Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
City and State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Vendor Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Vendor Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Line Items			
Invoice Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Processing			
Email Body	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Invoice Entered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Project Manager Reviewed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Department Approver Reviewed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Invoice Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Administration			
Project Manager			
Project Manager*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Office	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Region	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Department Approver			
Approver Name*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Approver Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Approver Threshold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Document Management <input type="checkbox"/> Show Section Images			
Submission			
Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Invoice Processing			
Column			
Assign			
Assigned to	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Assigned to Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Assigned Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Approval			
Check Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Check Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Rejection			
Rejected Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Rejected Reason	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Managment			
Rejected Email Body	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
New Column			
Processing Info			
Invoice Processed By	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Invoice Processed Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>



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Design Home Forms Views Applications Themes

Views
Add a New View

View Name	Default View	View Fields	Edit Display Info
All Invoices	No	Invoice Number, Payment Due Date, Currency, Vendor, Vendor Name, Vendor Address, City and State, Vendor Email, Vendor Phone, Invoice Total, Email Body, Invoice Entered, Project Manager Reviewed, Department Approver Reviewed, Invoice Approved, Project Manager, Name, Email, Department, Office, Region, Approver Name, Approver Email, Approver Threshold, Date Submitted, Assigned to, Assigned to Email, Assigned Date, Check Number, Check Date, Rejected Date, Rejected Reason, Rejected Email Body, Invoice Processed By, Invoice Processed Date	Edit Display Info

- ✓ Click Add New View

As Shown on the screen below

1. Type "Completed Invoices" in the View Name text box
2. Select Invoices from the Type dropdown menu.
3. Check the following boxes under "Show In View":
 - Invoice Number
 - Payment Due Date
 - Vendor Name
 - Invoice Total
 - Check Number
4. Select Invoice Number as the Default Search
5. Click Save
6. Click Back



View Name:

Type:

Show Type
 Show Created By
 Show Created Date
 Show Last Updated By
 Show Extra Information
 Show Last Updated Date
 Show Available Actions

Default View:

Field Name	Show in View	Searchable	Default Search
Invoice Submission Info			
Invoice Details			
Invoice			
Invoice Number*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Payment Due Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Currency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Info			
Vendor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
City and State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Line Items			
Invoice Total	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Processing			
Email Body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Entered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Project Manager Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department Approver Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Administration			
Project Manager			
Project Manager*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department Approver			
Approver Name*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Approver Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Approver Threshold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Document Management <input type="checkbox"/> Show Section Images			
Submission			
Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Processing			
Column			
Assign			
Assigned to	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Assigned to Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Assigned Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Approval			
Check Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Check Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Rejection			
Rejected Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Rejected Reason	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Managment			
Rejected Email Body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
New Column			
Processing Info			
Invoice Processed By	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Processed Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>



Design Home Forms Views Applications Themes

Edit View Display Information

Save Delete Close

View Name:

Forms:

Extra Information: Show Form Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions

Default View:

Predefined Filters: [Edit](#)

Allow Advanced Search:

Visibility Control:

Allow Public Access:

View Theme:

Menu Theme:

Header Theme:

Footer Theme:

Export Control:

Field Name	Show in View	Searchable	Default Search
------------	--------------	------------	----------------

✓ Check Predefined Filters

Accounts Payable Invoice Processing Workflow Application User Mode | Design Mode Logged in as John Doe :: Log Off

[Learn how to WAG™](#)

Predefined View Filters

[Add Group](#)

Group	Fields
✖ Group 1 Add/Remove Fields	- No Fields -

Select Fields for Group

- Approver Email (Text)
- Approver Name (Combo Box)
- Approver Threshold (Number)
- Assigned Date (Text)
- Assigned To (Combo Box)
- Assigned to Email (Text)
- Check Date (Text)
- Check Number (Text)
- City and State (Text)
- Currency (Combo Box)
- Date Submitted (Date)
- Department (Text)

1. Check *Check Number* from the "Select Fields for Group 1" box.
2. Click Ok



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Predefined View Filters

[Add Group](#)

E ✕ Group 1 [Add/Remove Fields](#)

Check Number	Not Null	▼
--------------	----------	---

All

1. Select "Not Null" from the dropdown box next to Check Number.
2. Click Save.



- ✓ Click on Views

Click Add New View

1. Type "Invoices Awaiting Project Manager Review" in the View Name text box
2. Select Invoices from the Type dropdown menu.
3. Check the following boxes under "Show In View":
 - Invoice Number
 - Payment Due Date
 - Invoice Total
 - Project Manager
 - Email
4. Select Invoice Number as the Default Search
5. Click Save
6. Click Back



Design Home Forms Views Applications Themes

Save Cancel

View Name:

Type:

Extra Information Show Type Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions

Default View:

Field Name	Show in View	Searchable	Default Search
Invoice Submission Info			
Invoice Details			
Invoice			
Invoice Number*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Payment Due Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Currency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Info			
Vendor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
City and State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Line Items			
Invoice Total	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Processing			
Email Body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Entered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Project Manager Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department Approver Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Administration			
Project Manager			
Project Manager*	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>



Learn how to WAG™ Logged in as John Doe :: Log Off

Design Home Forms Views Applications Themes

Edit View Display Information

Save Delete Close

View Name: Invoices Awaiting Project Manager Review

Forms: Invoice

Extra Information: Show Form Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions

Default View:

Predefined Filters: [Edit](#)

Allow Advanced Search:

Visibility Control:

Allow Public Access:

View Theme: -Default-

Menu Theme: -Default-

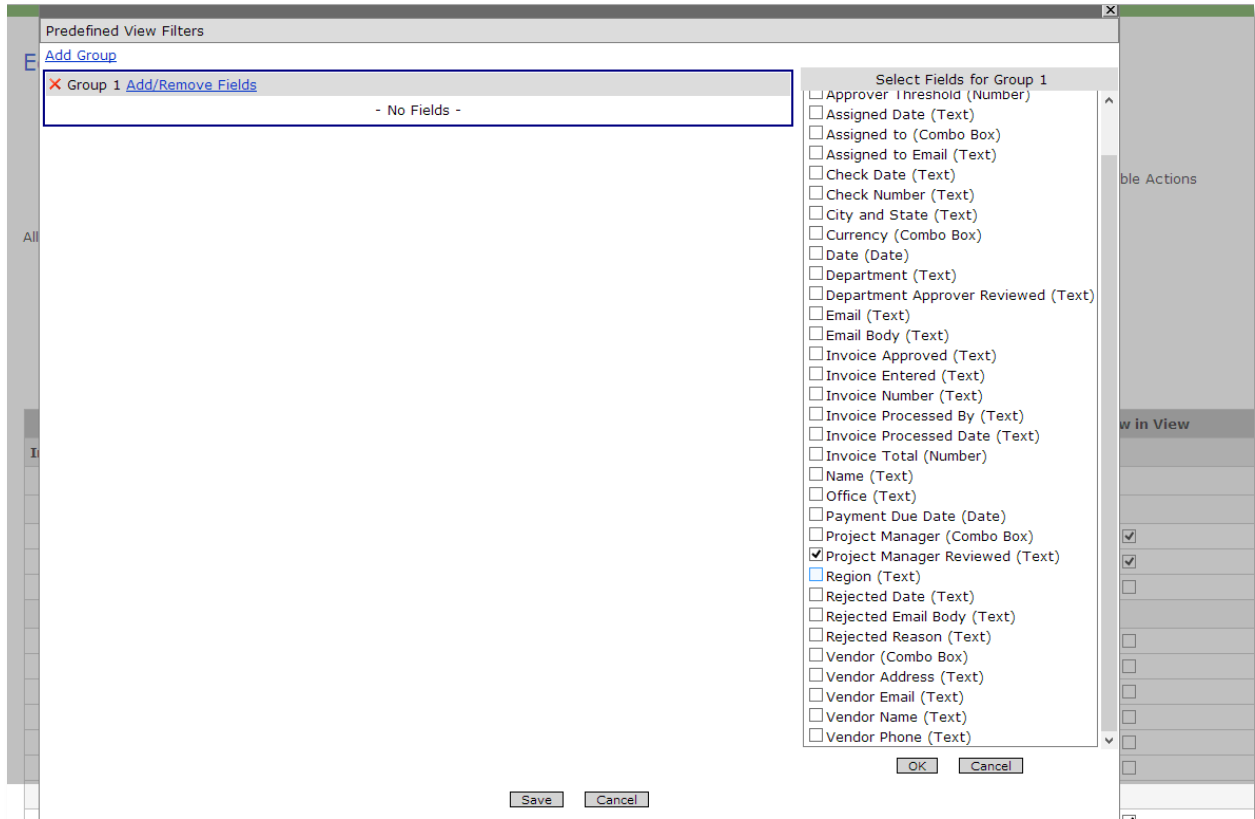
Header Theme: -Default-

Footer Theme: -Default-

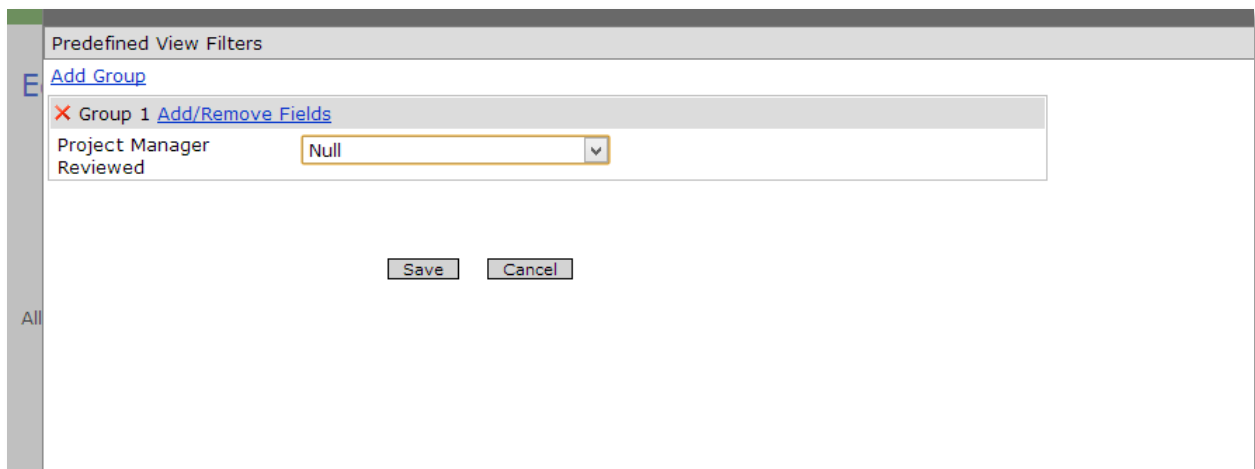
Export Control:

Field Name	Show in View	Searchable	Default Search
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✓ Check "Predefined Filters"



1. Check "Project Manager Reviewed" from the "Select Fields for Group 1" box.
2. Click Ok



1. Select "Not Null" from the dropdown box next to Project Manager Reviewed.
2. Click Save



1. Click Views
2. Click Add New View
3. As Shown on the Screen of next page
4. Type "Invoices in Accounting Queue" in the View Name text box
5. Select Invoices from the Type dropdown menu.
6. Check the following boxes under "Show In View":
 - Invoice Number
 - Payment Due Date
 - Invoice Total
 - Assigned To
 - Assigned To Email
7. Select Invoice Number as the Default Search
8. Click Save
9. Click Back



Learn how to WAG™ Logged in as John Doe :: [Log Off](#)

[Design Home](#) [Forms](#) [Views](#) [Applications](#) [Themes](#)

View Name:

Type:

Show Type
 Show Created By
 Show Created Date
 Show Last Updated By
 Show Last Updated Date
 Show Available Actions

Default View:

Field Name	Show in View	Searchable	Default Search
Invoice Submission Info			
Invoice Details			
Invoice			
Invoice Number*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Payment Due Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Currency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Info			
Vendor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
City and State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Line Items			
Invoice Total	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Processing			
Email Body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Entered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Project Manager Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department Approver Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Administration			
Project Manager			
Project Manager*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department Approver			
Approver Name*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Approver Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Approver Threshold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Document Management <input type="checkbox"/> Show Section Images			
Submission			
Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Processing			
Column			
Assign			
Assigned to	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Assigned to Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Assigned Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Approval			
Check Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Check Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>



Learn how to WAG™ Logged in as John Doe :: Log Off

Design Home Forms Views Applications Themes

Edit View Display Information

Save Delete Close

View Name: Invoices In Accounting Queue

Forms: Invoice

Extra Information: Show Form Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions

Default View:

Predefined Filters:

Allow Advanced Search:

Visibility Control:

Allow Public Access:

View Theme: -Default-

Menu Theme: -Default-

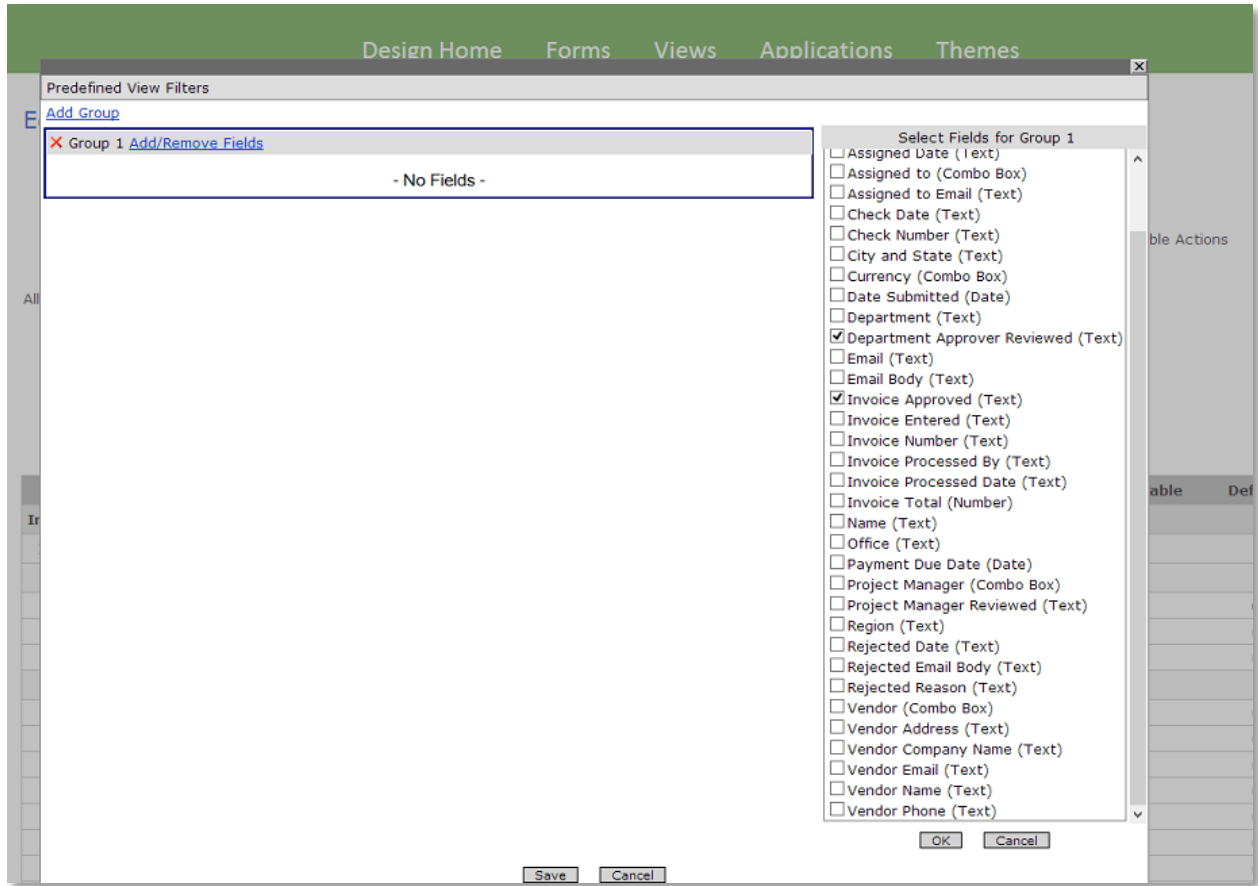
Header Theme: -Default-

Footer Theme: -Default-

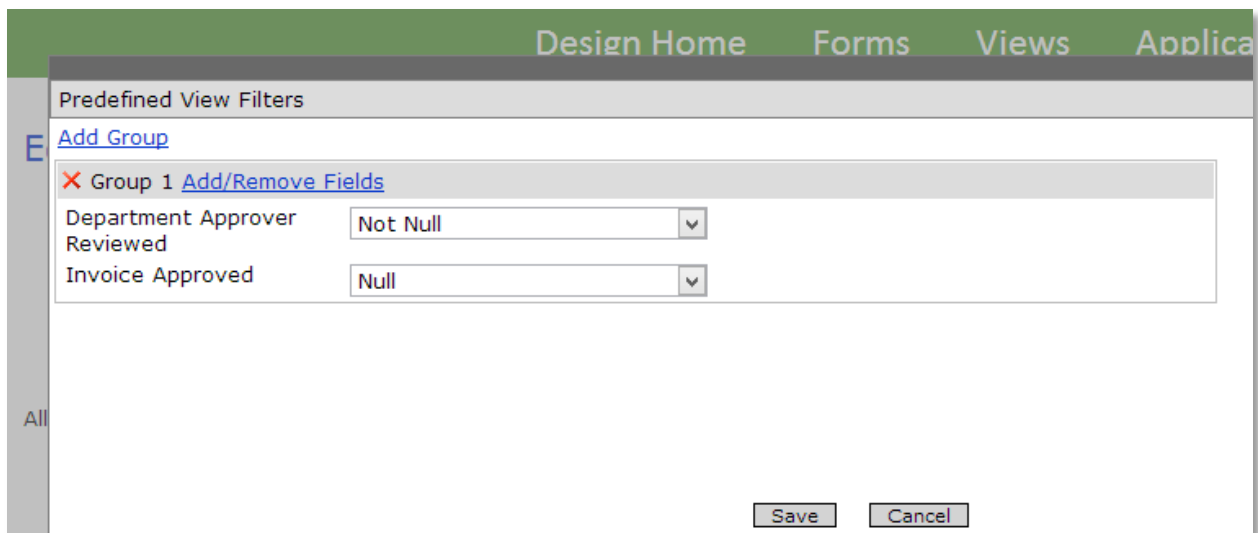
Export Control:

Field Name	Show in View	Searchable	Default Search
------------	--------------	------------	----------------

- ✓ Check Predefined Filters



✓ Check Department Approver Reviewed and Invoice Approved and click OK





❖ *Invoices Waiting for Department Approval*

1. Click Views
2. Click Add New View
3. Type "Invoices Waiting For Department Approver" in the View Name text box
4. Select Invoices from the Type dropdown menu.
5. Check the following boxes under "Show In View":
 - Invoice Number
 - Payment Due Date
 - Invoice Total
 - Approver Name
 - Approver Email
6. Select Invoice Number as the Default Search
7. Click Save.
8. Click Back.



Invoice Application | User Tools | Design Tools | [Learn how to WAG™](#) | Logged in as John Doe :: [Log Off](#)

[Design Home](#) | [Forms](#) | [Views](#) | [Applications](#) | [Themes](#)

View Name:

Type:

Extra Information Show Type Show Created By Show Created Date Show Last Updated
 By Show Last Updated Date Show Available Actions

Default View:

Field Name	Show in View	Searchable	Default Search
Invoice Submission Info			
Invoice Details			
Invoice			
Invoice Number*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Payment Due Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Currency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Info			
Vendor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
City and State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Vendor Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Line Items			
Invoice Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Processing			
Email Body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Entered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Project Manager Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department Approver Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Administration			
Project Manager			
Project Manager*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Department Approver			
Approver Name*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Approver Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Approver Threshold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Document Management <input type="checkbox"/> Show Section Images			
Submission			
Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
Invoice Processing			



Learn how to WAG™ Logged in as John Doe :: [Log Off](#)

[Design Home](#) [Forms](#) [Views](#) [Applications](#) [Themes](#)

Edit View Definition

[Add New Line](#) [Save](#) [Back](#)

Field/Section Name	Show in Header	Alias	Move
Invoice Number	<input checked="" type="checkbox"/>	<input type="text"/>	⋮
Payment Due Date	<input checked="" type="checkbox"/>	<input type="text"/>	⋮
Invoice Total	<input checked="" type="checkbox"/>	<input type="text"/>	⋮
Approver Name	<input checked="" type="checkbox"/>	<input type="text"/>	⋮
Approver Email	<input checked="" type="checkbox"/>	<input type="text"/>	⋮



Learn how to WAG™ Logged in as John Doe :: [Log Off](#)

[Design Home](#) [Forms](#) [Views](#) [Applications](#) [Themes](#)

Edit View Display Information

View Name:

Forms: ▼

Extra Information: Show Form Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions

Default View:

Predefined Filters: [Edit](#)

Allow Advanced Search:

Visibility Control:

Allow Public Access:

View Theme: ▼

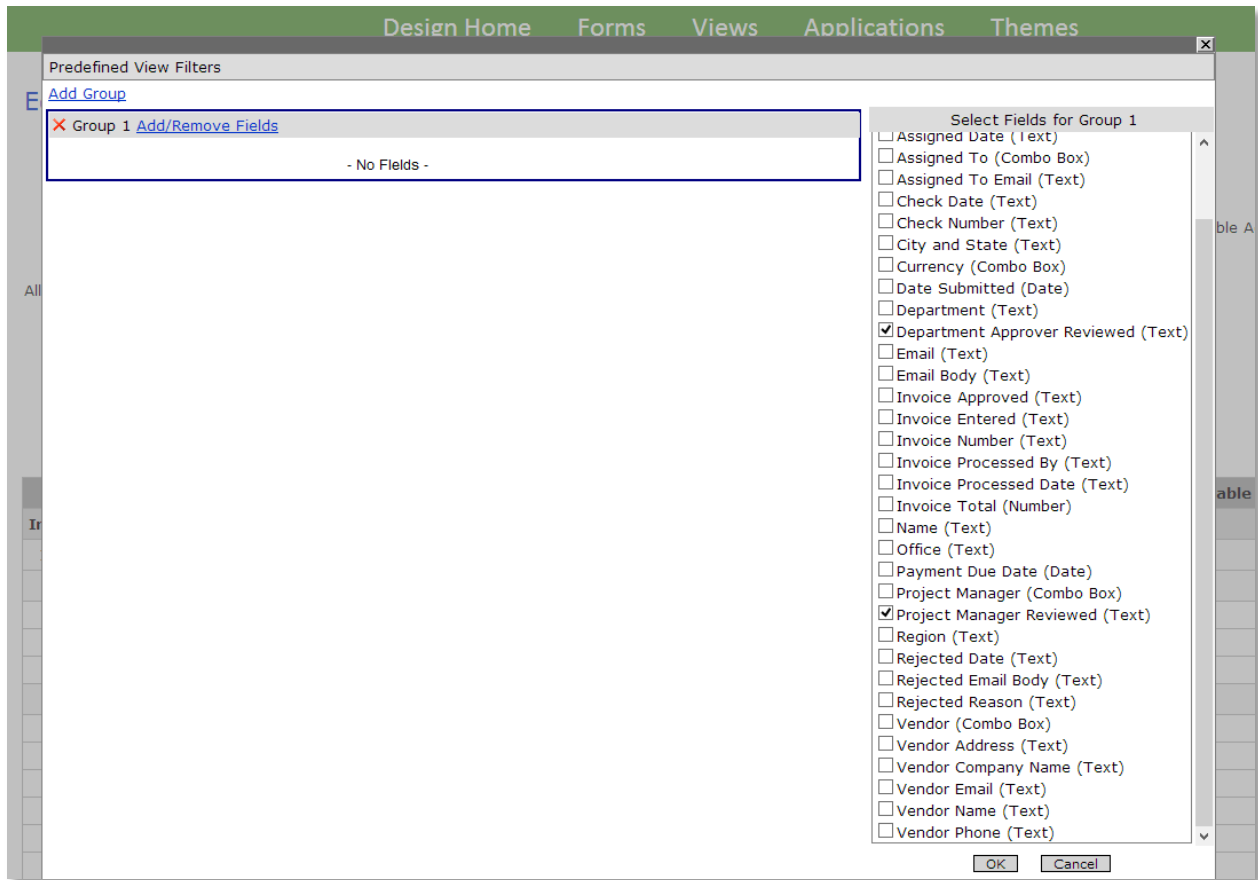
Menu Theme: ▼

Header Theme: ▼

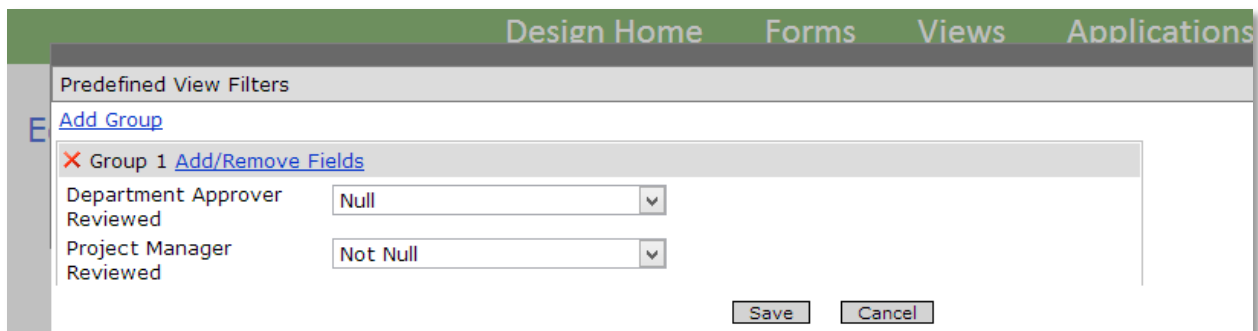
Footer Theme: ▼

Export Control:

- ✓ Check "Predefined Filters"



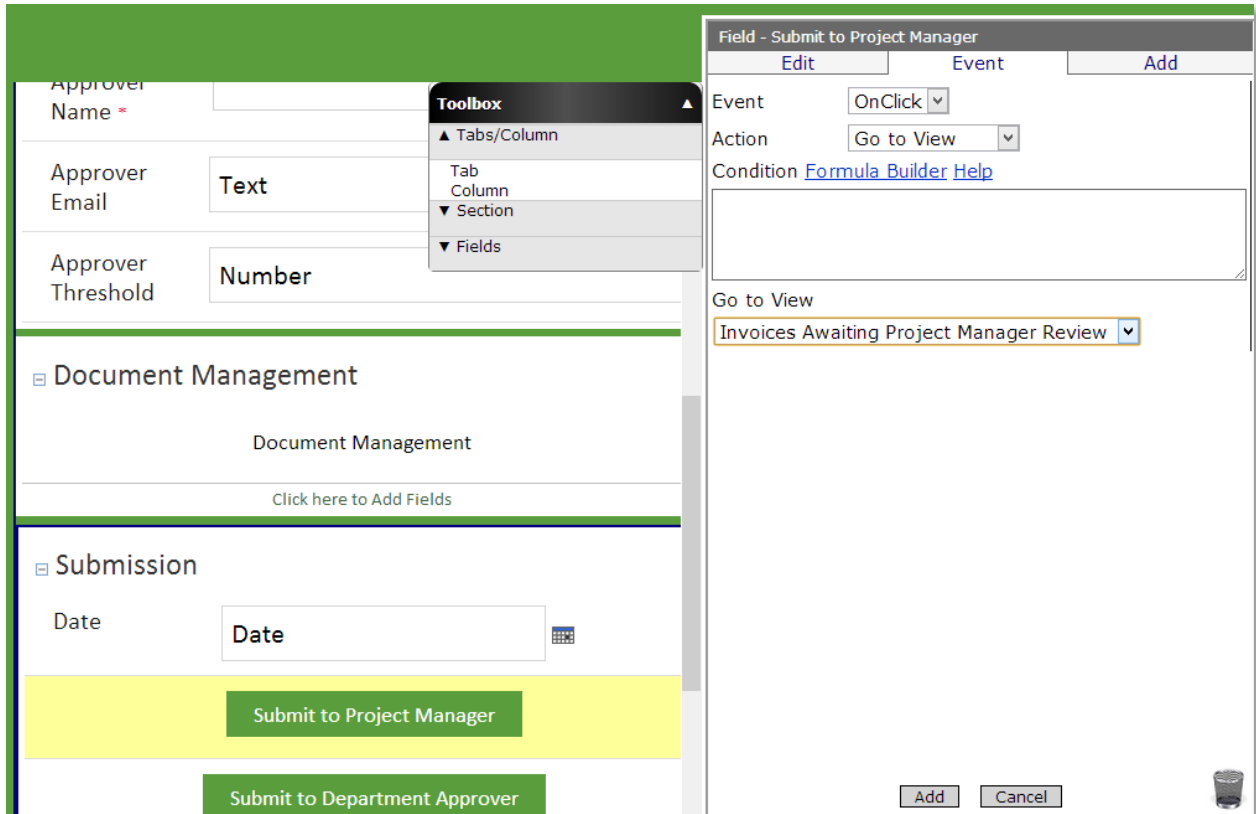
1. Check "Project Manager Reviewed" from the "Select Fields for Group 1" box.
2. Check "Department Approver Reviewed" from the "Select Fields for Group 1" box.
3. Click Ok



1. Select "Not Null" from the dropdown box next to Project Manager Reviewed.
2. Select "Null" from the dropdown box next to Invoice Approved.



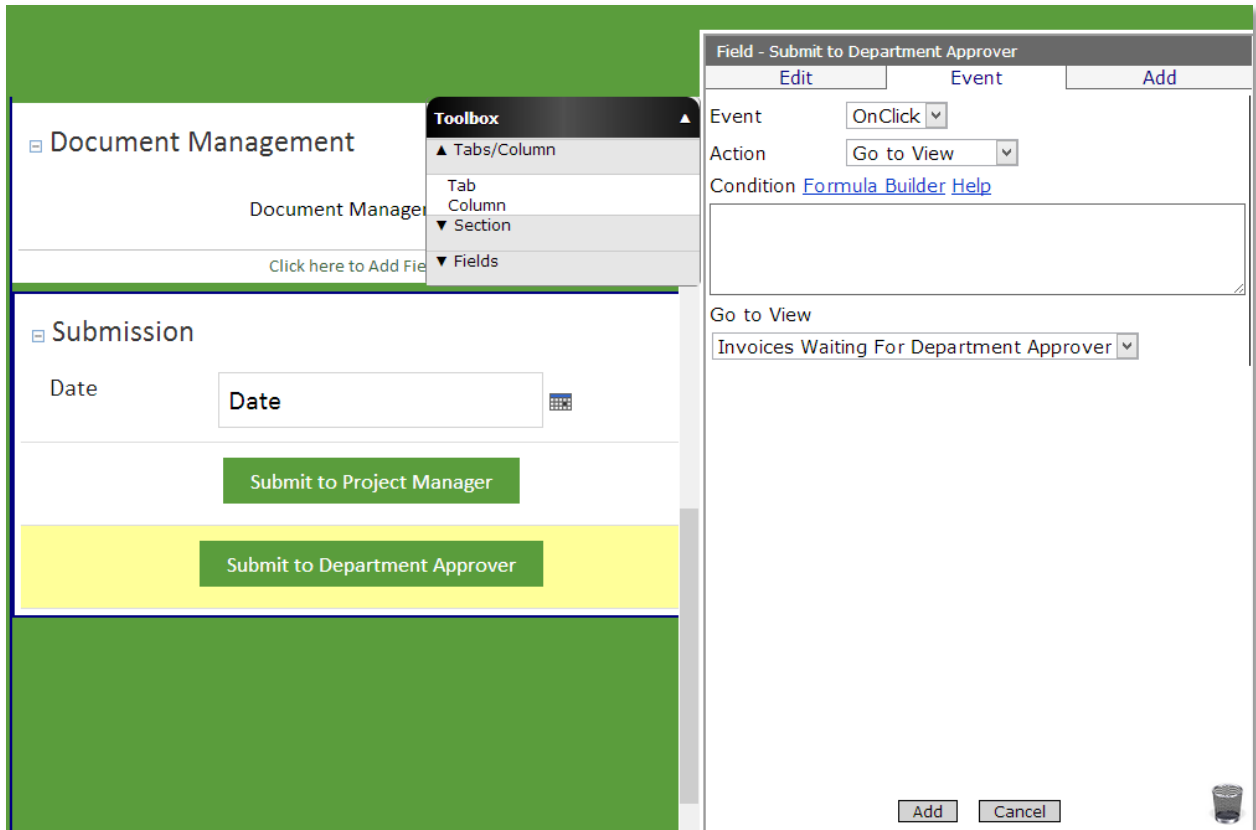
3. Click Save. Click Applications, Invoice Application, Forms, Invoice.
 - ❖ Continue creating the buttons



- ✓ In the Tab Invoice Submission Info click on Submit Project Manager button
1. Click on the Event tab
2. Click on "Add New Event"
3. Select Go To View from the Action dropdown menu
4. Select "Invoices Awaiting Project Manager Review" from the Go to View dropdown menu
5. Click Add



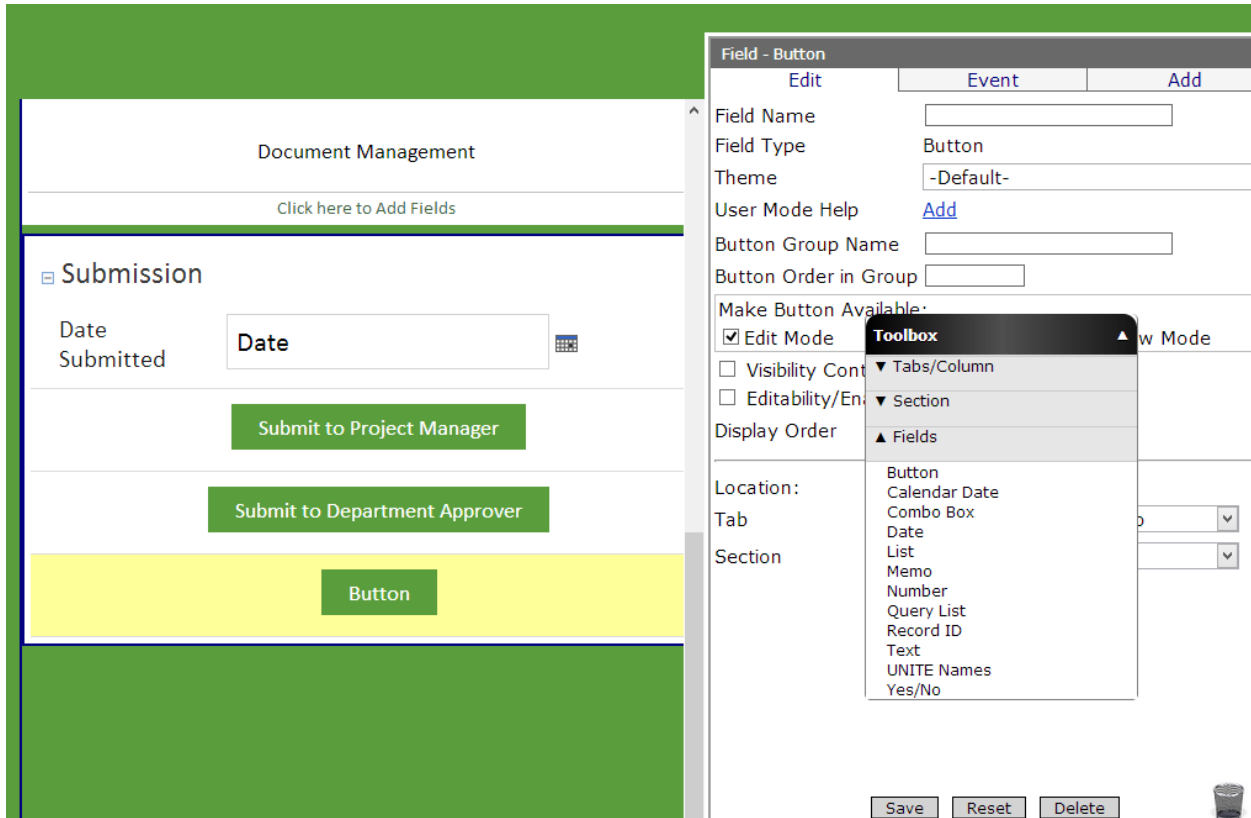
❖ Continue creating the buttons



- ✓ click on Submit to Department Approver
- 6. Click on the Event tab
- 7. Click on "Add New Event"
- 8. Select Go To View from the Action dropdown menu
- 9. Select "Invoices waiting for Department Approver" from the Go to View dropdown menu
- 10. Click Add



❖ Create Button named Submit to Accounting



- ✓ Drag and Drop a Button field from the toolbox beneath the Submit to Department Approver button.



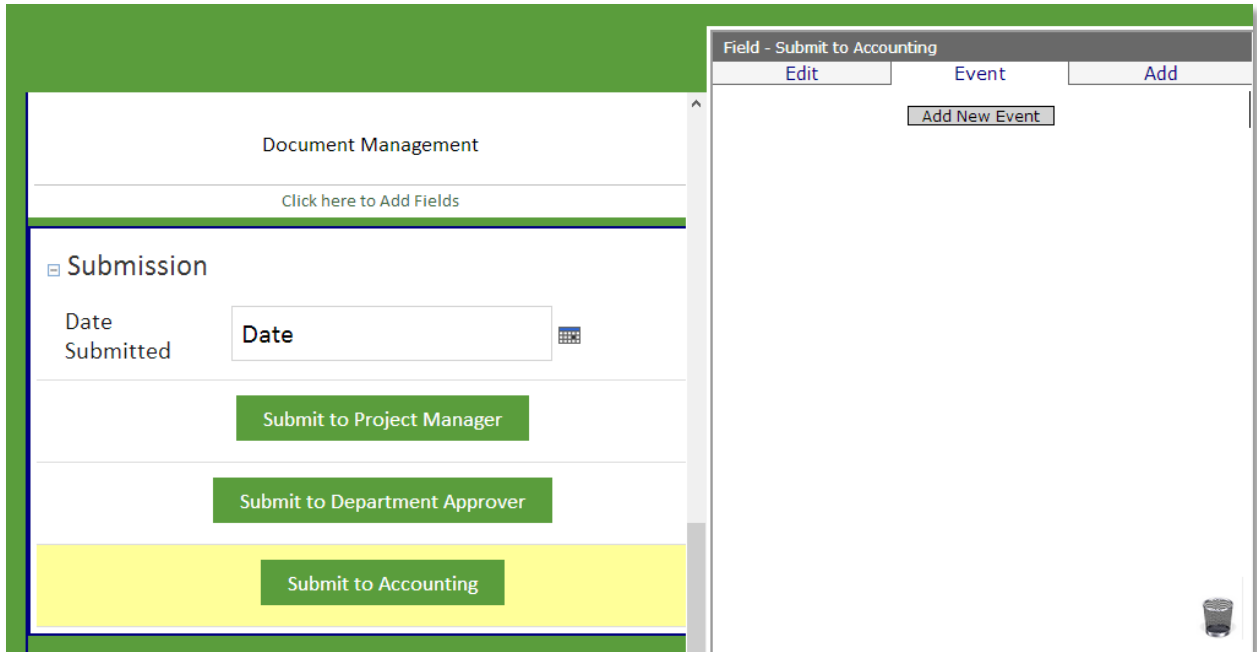
❖ Name the button

The screenshot shows a software interface with a 'Field - Button' configuration panel on the right. The panel has three tabs: 'Edit', 'Event', and 'Add'. The 'Event' tab is selected. The configuration includes the following fields and options:

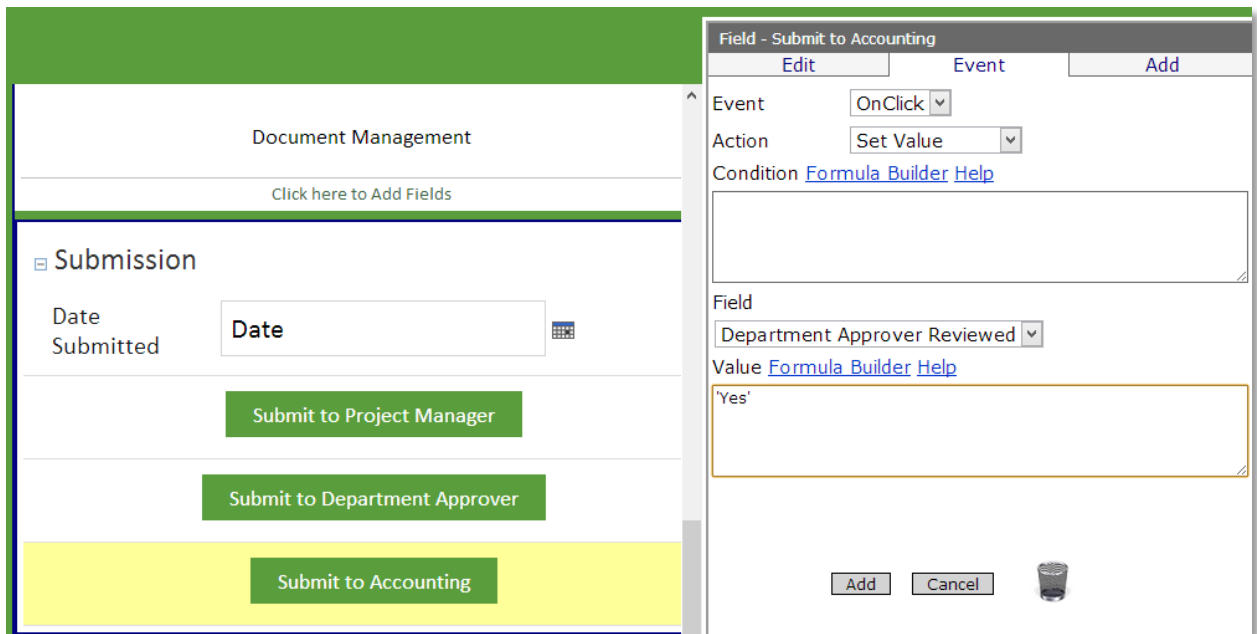
- Field Name: Submit to Accounting
- Field Type: Button
- Theme: -Default-
- User Mode Help: Add
- Button Group Name: (empty)
- Button Order in Group: (empty)
- Make Button Available: Edit Mode, Read Mode, View Mode
- Visibility Control: (with a 'Formula Builder' link)
- Formula: `[Department Approver Reviewed]='' && [Project Manager Reviewed]!=''`
- Editability/Enable Control:
- Display Order: 3
- Location: Tab: Invoice Submission Info, Section: Submission

At the bottom of the panel are buttons for 'Save', 'Reset', and 'Delete', along with a trash icon.

- 1) In the properties box click in Field Name and type Submit to Accounting in it
- 2) Check the Visibility Control and in the formula builder select:
[Department Approver Reviewed]='' && [Project Manager Reviewed]!=''
- 3) Click Save
- 4) Click Event



✓ Click Add New Event



1. In the Action drop down list choose *Set Value*
2. In the Field drop down list choose *Department Approver Reviewed*
3. In the Value formula box type *'Yes'* and click *Add*



- ✓ Click Add new Event

Document Management

Click here to Add Fields

Submission

Date Submitted

Submit to Project Manager

Submit to Department Approver

Submit to Accounting

Field - Submit to Accounting

Edit Event Add

Event

Action

Condition [Formula Builder Help](#)

Note: Save Record will fire after Set-Value events regardless the Fire Order.

Add Cancel

1. In the Action drop down list choose *Save Record*
2. Click *Add*.



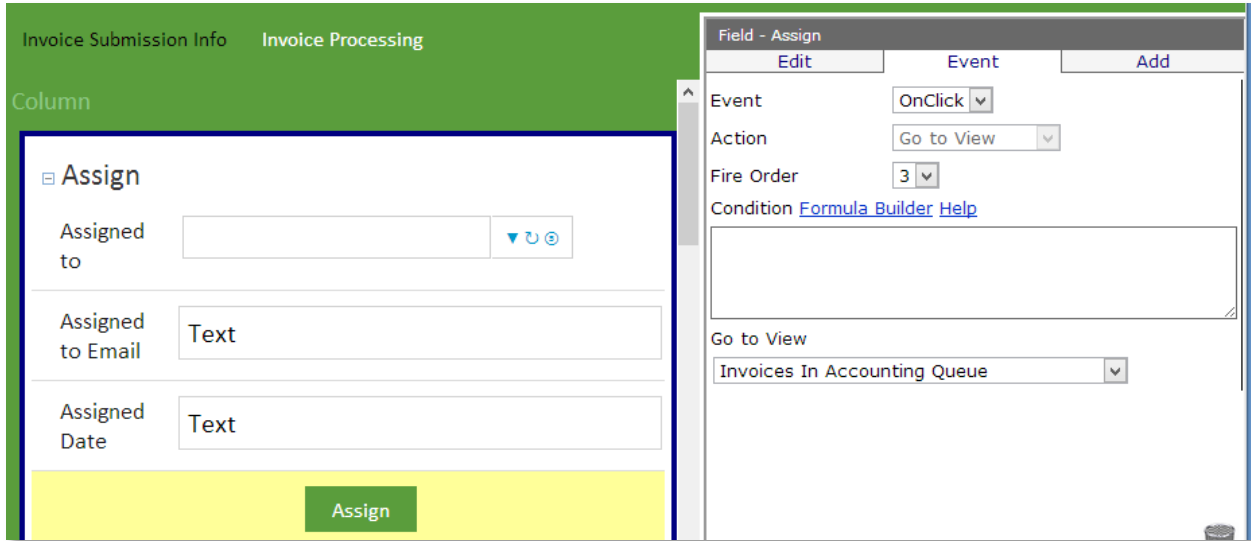
❖ Click add New Event

The screenshot shows the WAG software interface. The main window has a green header with 'Submission Info' and 'Invoice Processing'. Below the header is a 'Document Management' section with a 'Click here to Add Fields' link. The main content area is titled 'Submission' and contains a 'Date Submitted' field with a calendar icon. Below the field are three green buttons: 'Submit to Project Manager', 'Submit to Department Approver', and 'Submit to Accounting'. A right-hand 'Field - Submit to Accounting' properties box is open, showing 'Event' set to 'OnClick', 'Action' set to 'Go to View', 'Fire Order' set to '3', and 'Go to View' set to 'Invoices In Accounting Queue'. The 'Add' button is highlighted in the properties box.

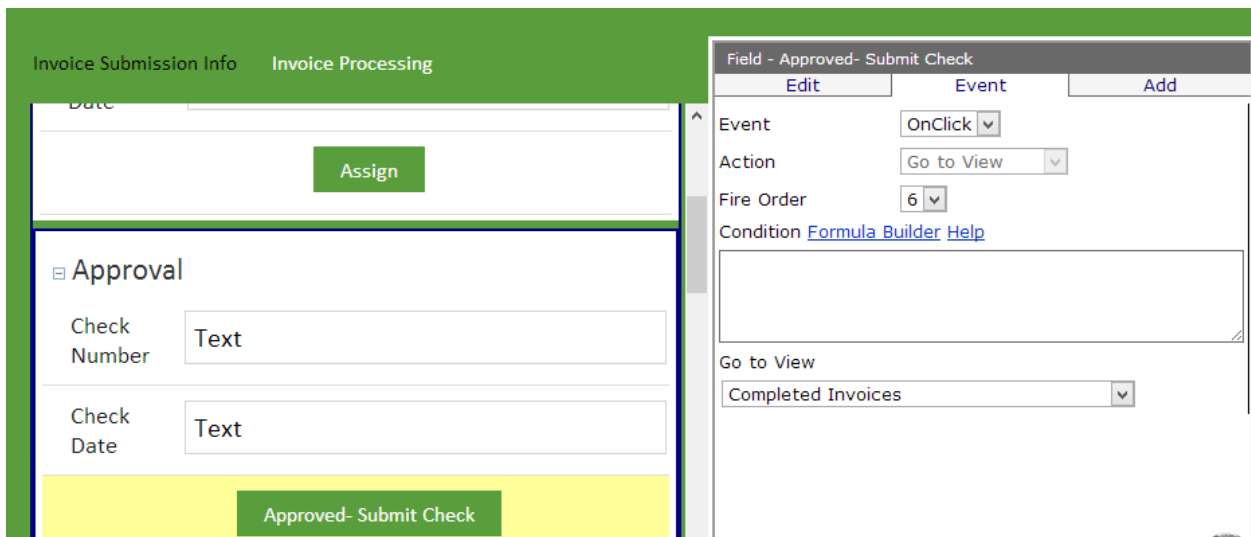
1. In the Properties box Action drop down list choose go to view
2. Go to view drop down list choose Invoices in Accounting Queue
3. Click Add



❖ Click on the tab Invoice Processing



11. Click on the Button named "Assign"
12. Click on the Event tab
13. Click on "Add New Event"
14. Select Go To View from the Action dropdown menu
15. Select "Invoices in Accounting Queue" from the Go to View dropdown Click Add



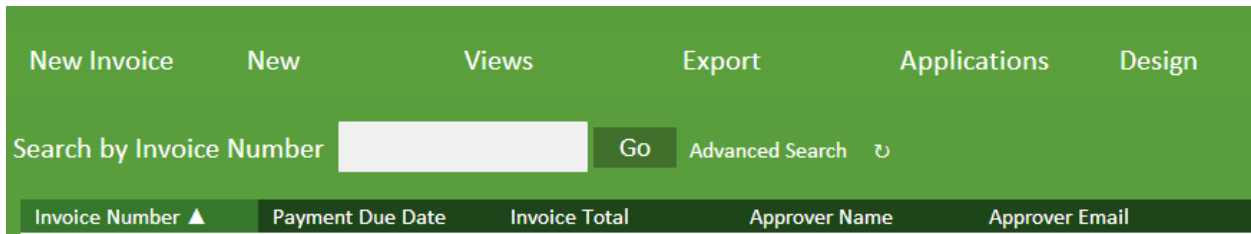


1. Click on the Button named Approved –Submit Check
2. Click on the Event tab
3. Click on "Add New Event"
4. Select Go To View from the Action dropdown menu
5. Select "Completed Invoices" from the Go to View dropdown menu
6. Click Add



❖ User Mode

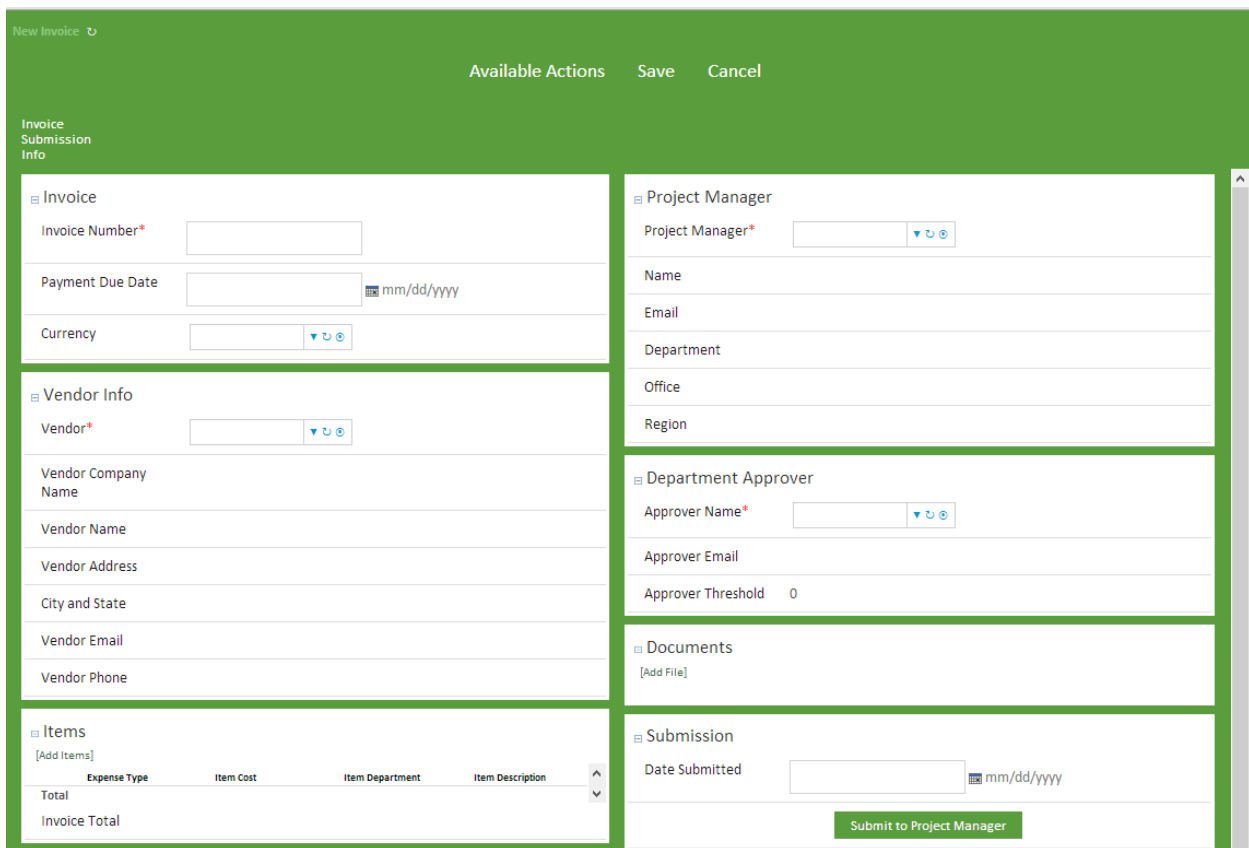
Processing the application on the Desktop Browser



1. Click New Invoice

❖ Key Point

User Mode is how your end users will see and use your app.





Enter the Data from the tables below.

Invoice Info	
Invoice Number	555
Payment Due Date	Choose the date from the calendar
Currency	Choose USD from the drop down list

Vendor Info	
Vendor	Choose Abadie from the drop down list
Vendor Name	Should be there after selecting the vendor
Vendor Address	Should be there after selecting the vendor
City And State	Should be there after selecting the vendor
Vendor Email	Should be there after selecting the vendor
Vendor Phone	Should be there after selecting the vendor

4. Click on Line Items and type and select following



New Items [↶](#)

Save Cancel

Items

▣ Items

Item Description

Item Cost

Account ▼ ↶ Ⓢ

Expense Type ▼ ↶

View Application on: [Mobile](#) | [Classic](#) :: Logged in as John Doe :: [Log off](#)

Items	
Item Description	IPad
Item cost	\$499
Account	Select a/P –Employer P/R Tax (20740-040)
Expense Type	Select trust



New Items ↻

Save Cancel

Items

☐ Items

Item Description

Item Cost

Account ▼ ↻ Ⓢ

Expense Type ▼ ↻

View Application on: [Mobile](#) | [Classic](#) :: Logged in as John Doe :: [Log off](#)

Project Manager

Project Manager	Select Adams Marvin
Name	Should be there after selecting the Manager
Email	Should be there after selecting the Manager
Department	Should be there after selecting the Manager
Office	Should be there after selecting the Manager
Region	Should be there after selecting the Manager



Department Approver	
Approver Name	Select Danielle Carlin
Approver Email	Automatic
Approver threshold	Automatic

Attach document if needed and click on the button Submit to Project Manager.

New Invoice [↶](#)

Available Actions Save Cancel

Invoice Submission Info

Invoice Info

Invoice Number*

Payment Due Date mm/dd/yyyy

Currency*

Vendor Info

Vendor*

Vendor Name Abadie Antonietta

Vendor Address 4210 Losh Lane

City and State Fort Worth, TX

Vendor Email atoniettaabadie@gmail.com

Vendor Phone (918) 245-5651

Line Items

[Add Line Item]

Account	Expense Type	Item Cost	Item Department	Item Description	Item Region
A/P - Employer P/R Tax (20740-040)	Trust	\$499.00		Ipad	
Total		499.000			

Total Records: 1

Invoice Total 499.000

Project Manager

Project Manager*

Name Adams Marvin

Email marvinadams01@gmail.com

Department Accounting

Office San Jose

Region NA CENTRAL

Department Approver

Approver Name*

Approver Email daniellectarlin42@gmail.com

Approver Threshold 1000000

Documents

[Add File] [↕](#)

Submission

Date Submitted 4/8/2013

[Submit to Project Manager](#)

✓ Click On Submit to Project Manager.



User Mode on Android.

- ❖ Project Manager sees that there is an Invoice Submitted for his review and logs in to his account with Android and Assignes the Invoice to Department Approver.

WAG - Login

Username marvinadams_01@gmail.com

Password

Sign In

Once the project Manager logs in with his credentials to his WAG Account , clicks on Accounts Payable Invoice Processing Workflow Application





WAG™

Accounts Payable Invoice Processing Workflow Application





  Invoices Waiting For Department ... + New





1
04/15/2013
\$499.00
Danielle Carlin
daniellecarlin42@gmail.com




10
04/03/2013
\$1,199.00
Alexa Tobias
alexatobias@gmail.com

5
04/08/2013
\$300.00
Danielle Carlin
daniellecarlin42@gmail.com

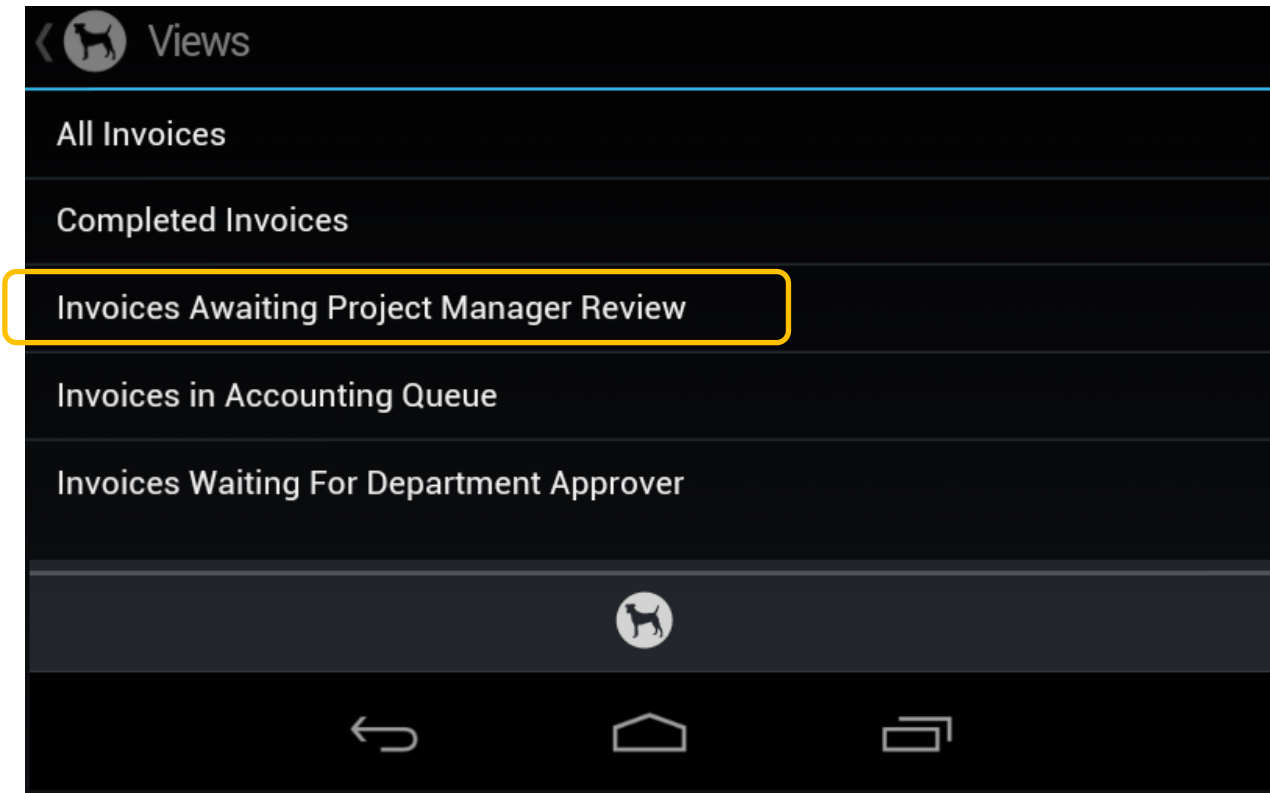
555
04/08/2013
\$499.00
Danielle Carlin
daniellecarlin42@gmail.com

6
03/29/2013
\$499.00
Danielle Carlin
daniellecarlin42@gmail.com

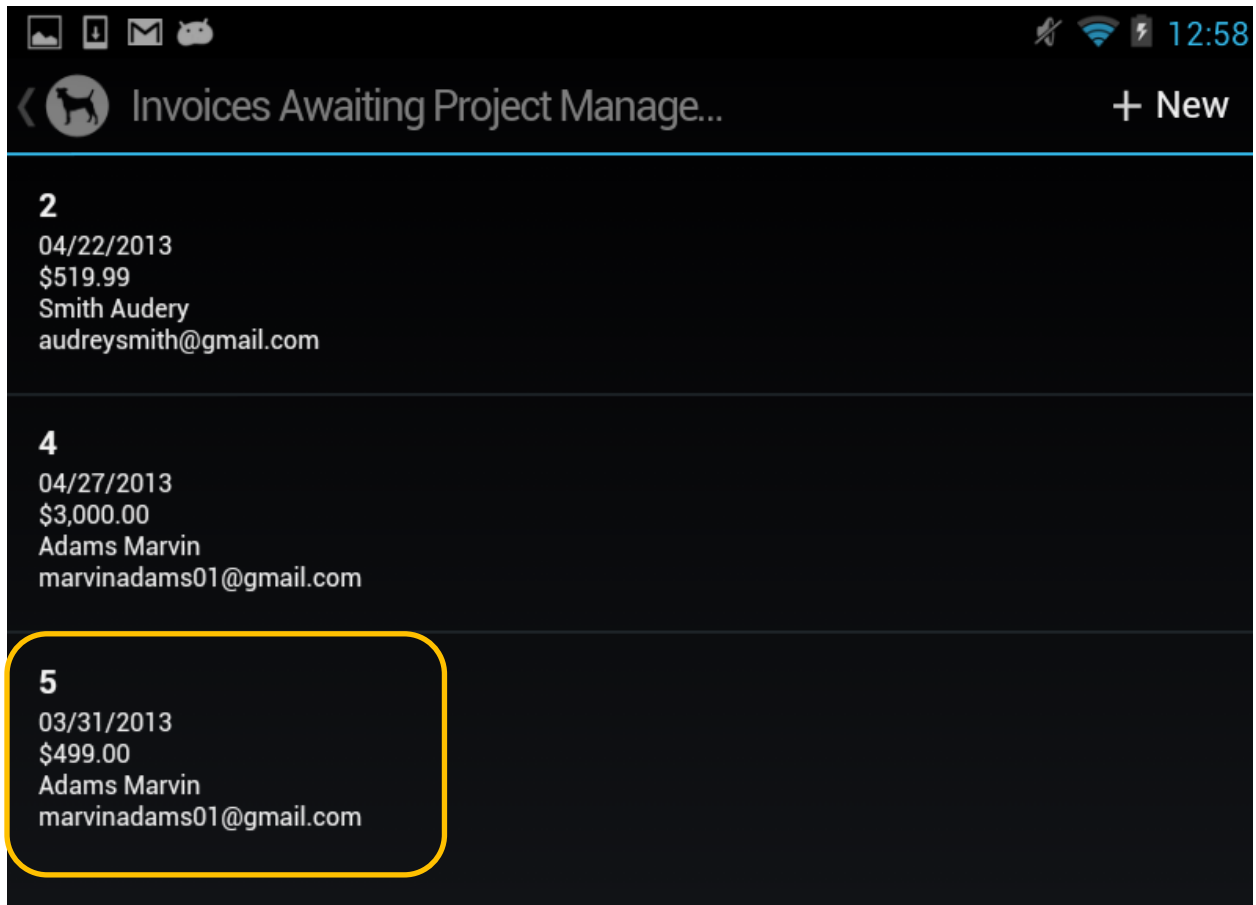
   

✓ Clicks on Views



- ✓ Clicks on Invoices Awaiting for Project Manager review



- ✓ And See the invoice awaiting form him. He clicks on the invoice



City and State Indianapolis, IN

Vendor Email karakenter@gmail.com

Vendor Phone (819) 653-4824

Line Items

Invoice Total 499

Project Manager

Project Manager * Adams Marvin

Name Adams Marvin

Email marvinadams01@gmail.com

Department Accounting

Office San Jose

Region NA CENTRAL

Department Approver

Approver Name * Danielle Carlin

Approver Email daniellectarlin42@gmail.com

Approver Threshold 1000000

Documents

Submission

Date Submitted 3/28/2013

Submit to Department Approver



And Submits it to Department Approver by clicking Submit to Department Approver Button.

❖ User Mode on iOS

Department Approver receives an email that she has an invoice awaiting for her review and she logs in to her WAG account with her Ipad.

WAG - Login

Login With Facebook

Username: Daniellecarlin42@gmail.com

Password: ●●●●●●

Sign In

Powered by SPC

- ✓ After the Department Approver logs into her account she will click on her Application: Accounts Payable Invoice Processing.

WAG™

Accounts Payable Invoice Processing Workflow Application >

Logout Design



[Back](#) **Invoices Waiting For Depart...** [+ New](#)

1
04/15/2013
\$499.00
Danielle Carlin
daniellecarlin42@gmail.com >

10
04/03/2013
\$1,199.00
Alexa Tobias
alexatobias@gmail.com >

5
03/31/2013
\$499.00
Danielle Carlin
daniellecarlin42@gmail.com >

5
04/08/2013
\$300.00
Danielle Carlin
daniellecarlin42@gmail.com >

555
04/08/2013
\$499.00
Danielle Carlin
daniellecarlin42@gmail.com >

6
03/29/2013
\$499.00
Danielle Carlin
daniellecarlin42@gmail.com >


WAG™ **Views** Sort Search

✓ Clicks On views



Back **Views**

- All Invoices >
- Completed Invoices >
- Invoices Awaiting Project Manager Review >
- Invoices in Accounting Queue >
- Invoices Waiting For Department Approver >**


WAG™

Clicks on Invoice waiting for department Approver



[Back](#) **Invoices Waiting For Depart...** [+ New](#)

1 04/15/2013 \$499.00 Danielle Carlin daniellecarlin42@gmail.com	>
10 04/03/2013 \$1,199.00 Alexa Tobias alexatobias@gmail.com	>
5 04/08/2013 \$300.00 Danielle Carlin daniellecarlin42@gmail.com	>
555 04/08/2013 \$499.00 Danielle Carlin daniellecarlin42@gmail.com	>
6 03/29/2013 \$499.00 Danielle Carlin daniellecarlin42@gmail.com	>

WAG™ Views Sort Search

✓ Clicks on the Invoice

And assigns the Invoice to Accountant Bob Gnitnuocca, Assigned to Email and Assigned Date will be there automatically after selecting the accountant.



Vendor Info	
Vendor *	Kenter >
Vendor Name	Kenter Kara
Vendor Address	6991 Petten Curve
City and State	Indianapolis, IN
Vendor Email	karakenter@gmail.com
Vendor Phone	(819) 653-4824

Line Items >	
Invoice Total	499

Project Manager	
Project Manager *	Adams Marvin >
Name	Adams Marvin
Email	marvinadams01@gmail.com
Department	Accounting
Office	San Jose
Region	NA CENTRAL

Department Approver	
Approver Name *	Danielle Carlin >
Approver Email	daniellecarlin42@gmail.com
Approver Threshold	1000000

Documents >	
Submission	
Date Submitted	3/28/2013

Submit to Accounting

✓ Clicks on Submit to Accounting

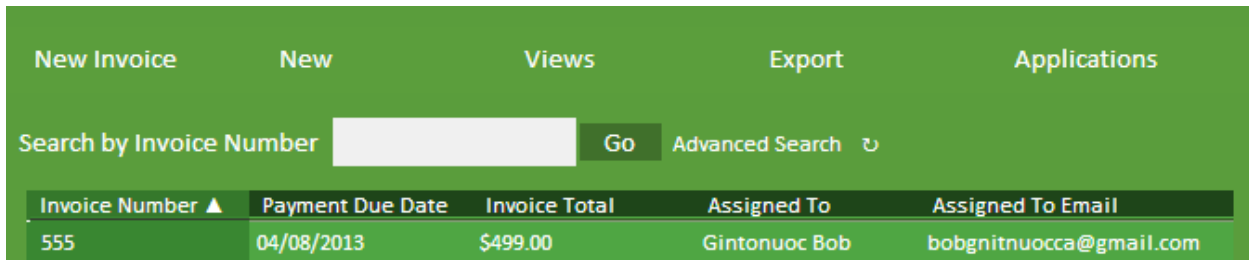


Now it's time for the Accountant to submit the Check. For that he will log in to his personal WAG Account on the Desktop browser.

He clicks on Views and "Invoices in Accounting Queue".



And sees this invoice in his bucket:



He clicks on it, clicks edit on the invoice page and clicks on "Invoice Processing" and rejects or approves the Invoice by clicking on the relevant button.



Invoice ↻

Available Actions Save Cancel

Invoice Submission Info Invoice Processing

Assign

Assigned To Gintonuoc Bob

Assigned To Email bobgnitnuocca@gmail.com

Assigned Date 4/8/2013

Assign

Processing Info

Invoice Processed By

Invoice Processed Date

Approval

Check Number

Check Date

Approved - Submit Check

Rejection

Rejected Date

Rejected Reason

Reject

View Application on: Mobile | Classic :: Logged in as Bob Gintonuoc :: Log off

This is how the Invoice is processed in the Invoice Application that you created.

You can Also Watch the video Tuirorials of this and other app development on our youtube channel www.youtube.com/webappgenerator.