ACCOUNTS PAYABLE INVOICE PROCESSING WORKFLOW APPLICATION

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WALNUT CREEK, CALIFORNIA

2013

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 d*emocratizing 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:

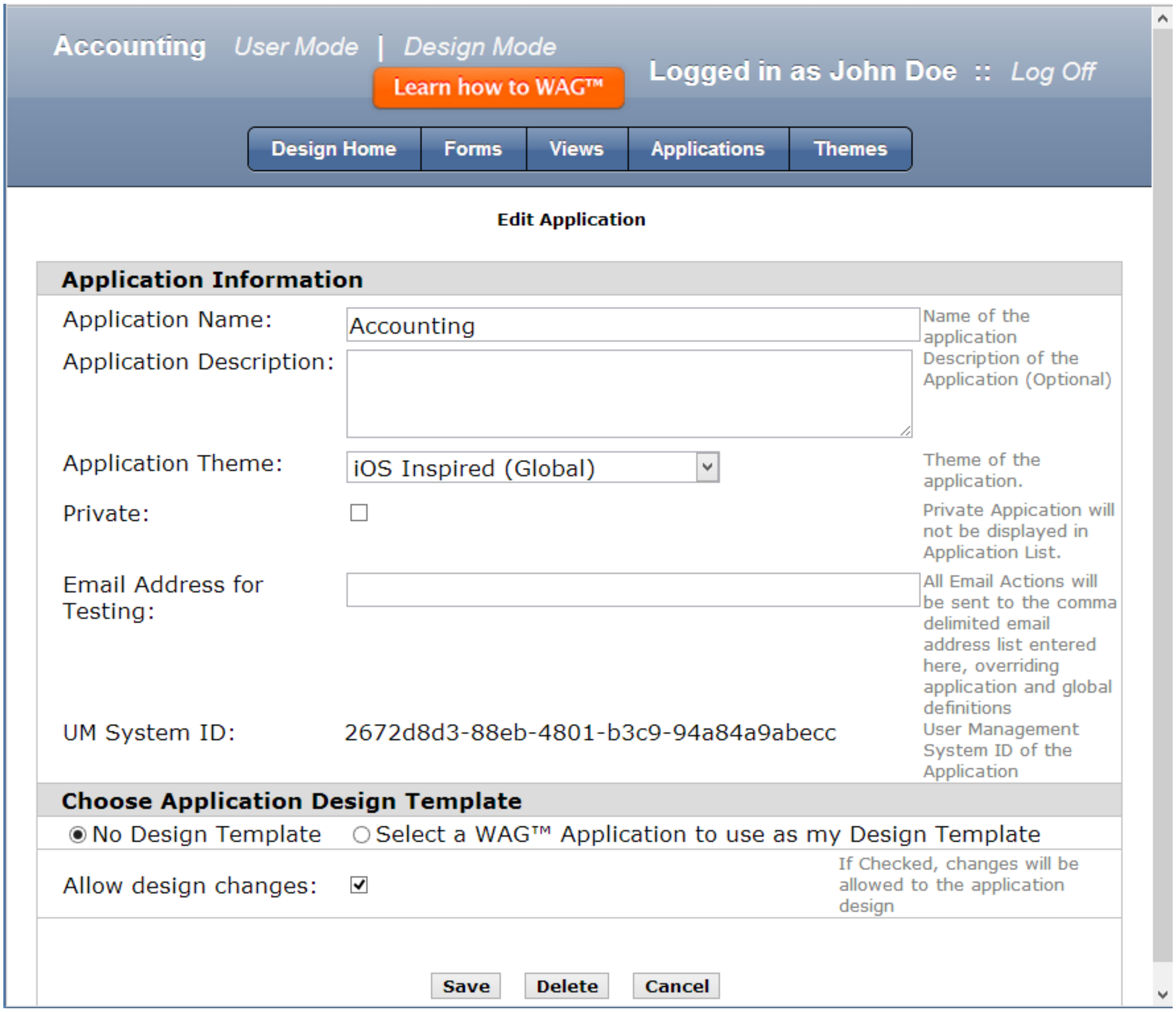
1. Invoice is entered and forwarded to an approver.
2. The approver examines the invoice and gives it his/her approval.
3. Manager reviews the invoice. He assigns it to an accountant.
4. Accounting organizes payment.

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

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

- <u>Step 1. Getting Started With WAG™</u>
  - Create an Account
    1. Go to www.webappgenerator.com
    2. Click the Signup—It's FREE button.
    3. <u>Fill out the Form with your information and click Signup.</u>
    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

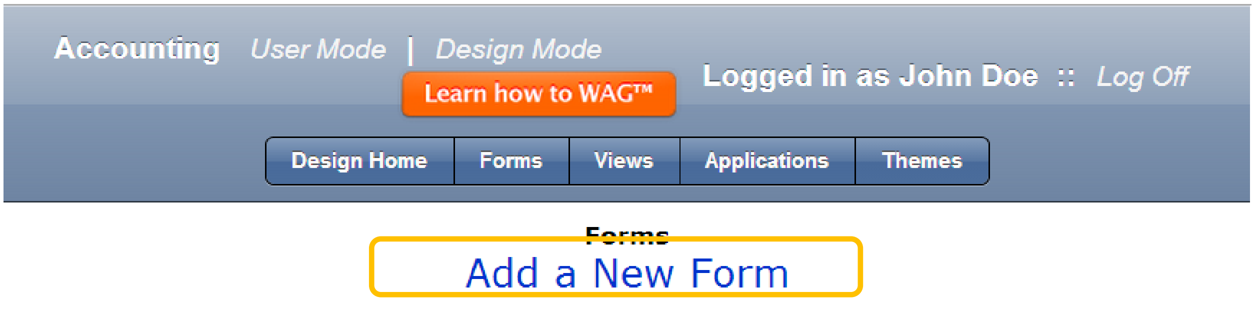


Step 2. Creating a New Application

- 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.

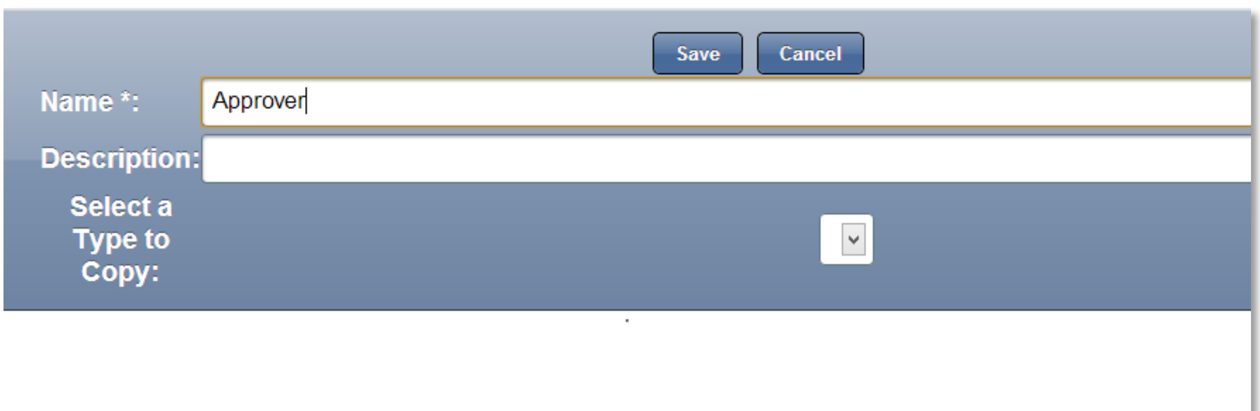
We will use this application as the reference for our main, Accounts Payable Invoice Processing workflow application.

- Create New Form Named Approver



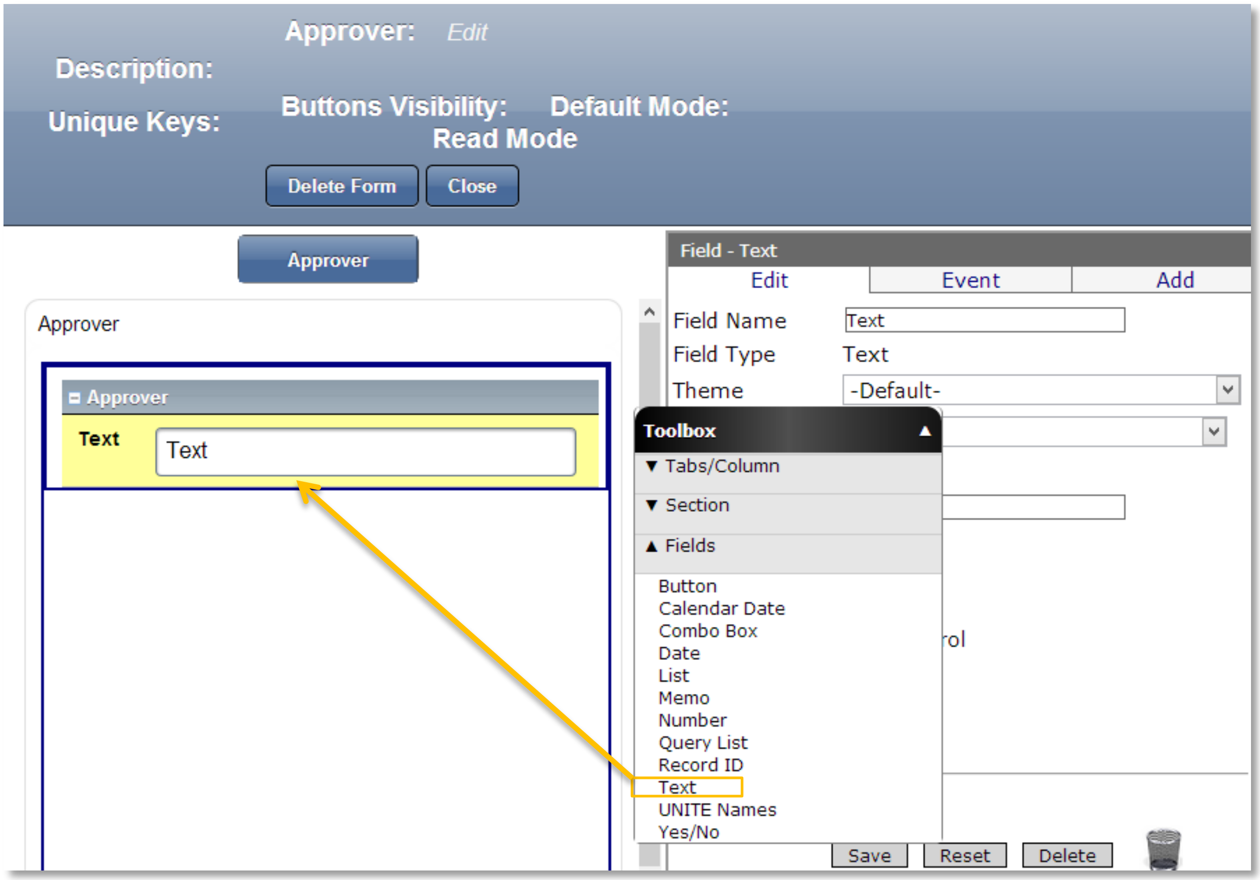
1. Click on Add New Form in the Design Mode

❖ Name the new Form



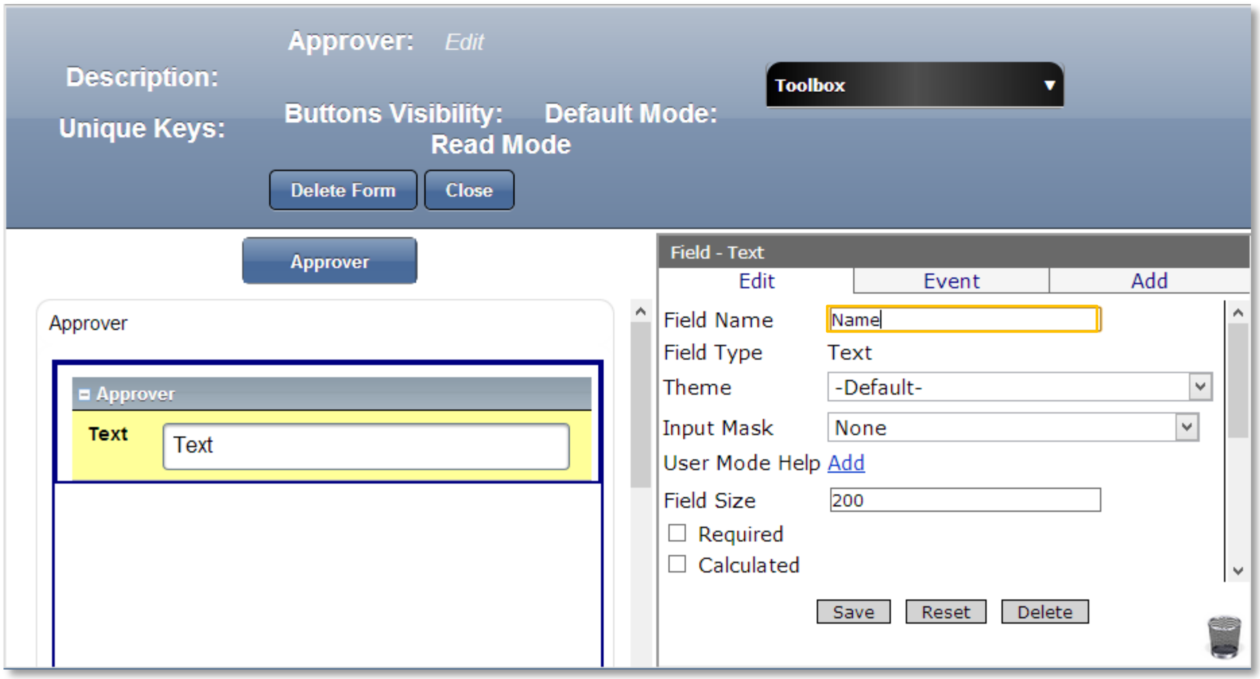
2. Click in the Name field and type Approver
3. Click Save

❖ Create Text Field named *Name*



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

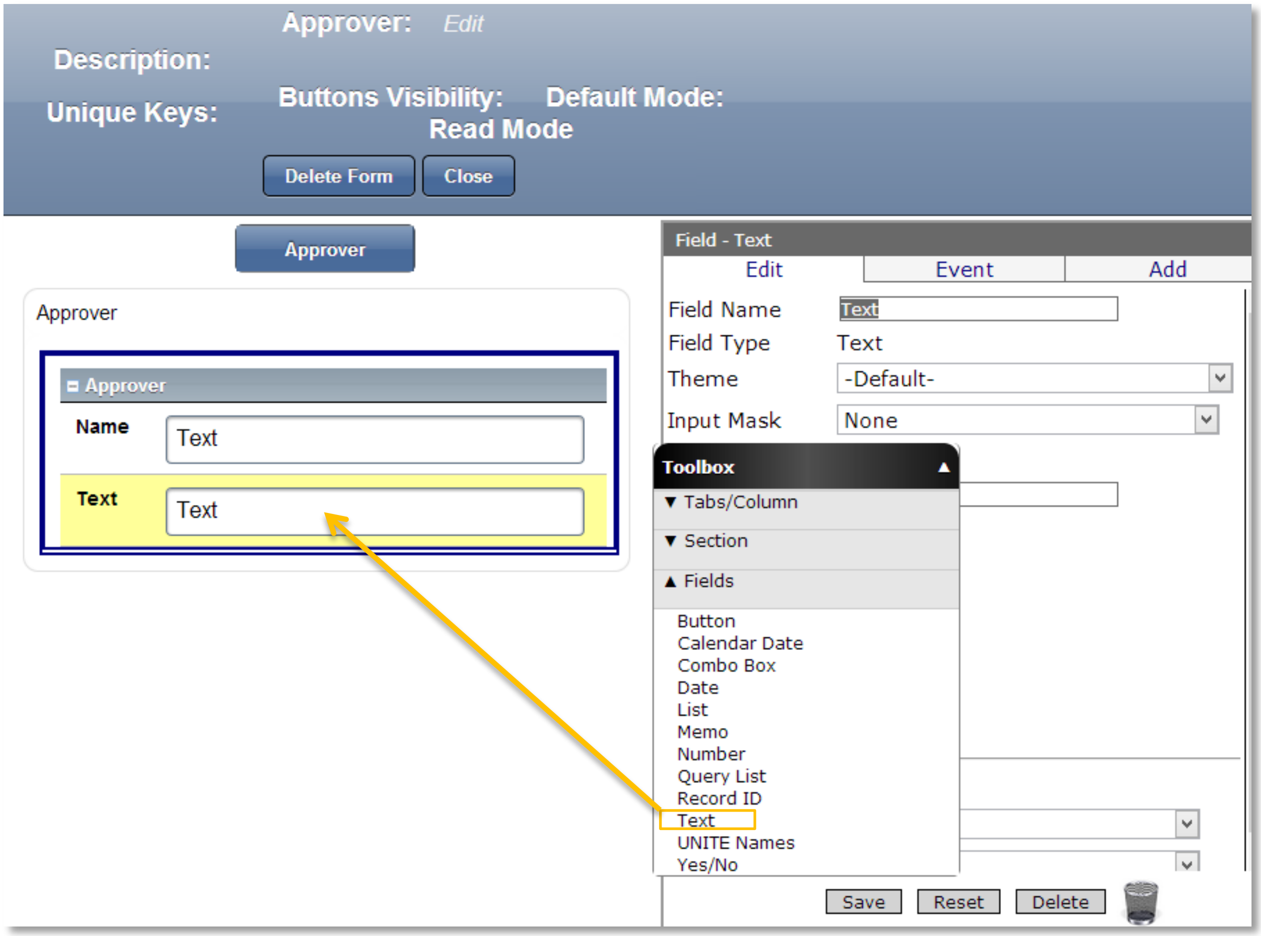
❖ Name the Text Field



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

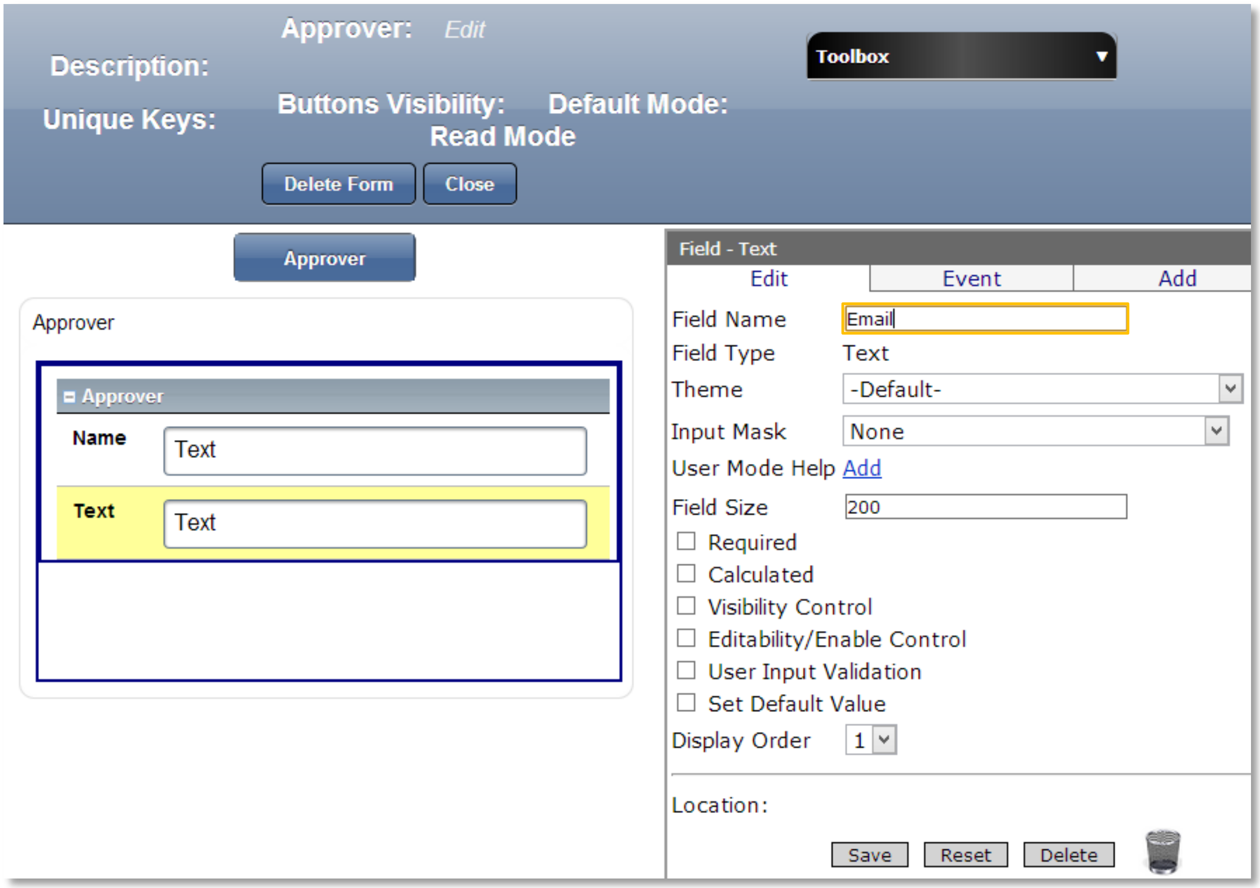
2. Click Save.

❖ Create Text Field Named Email



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

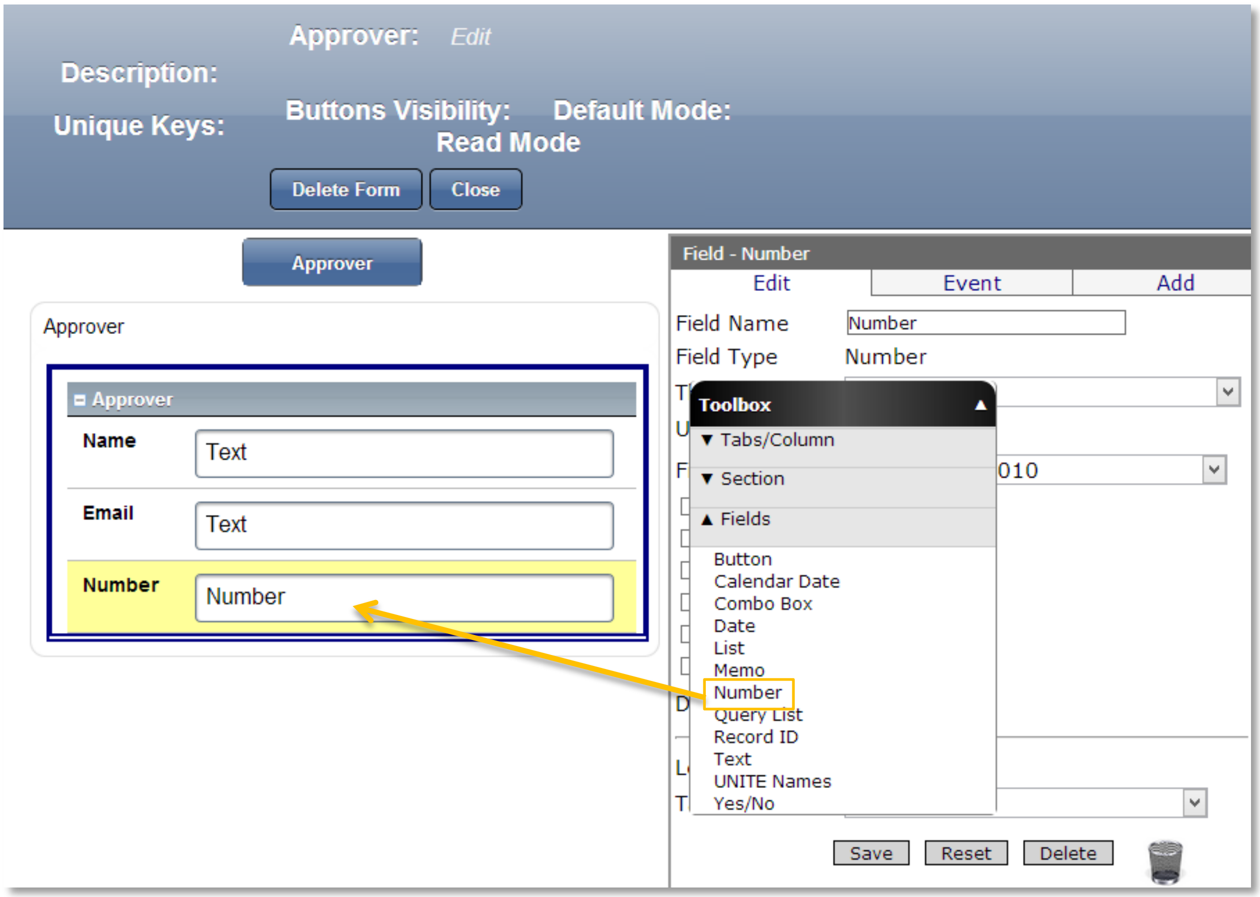
❖ Name the Text Field



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

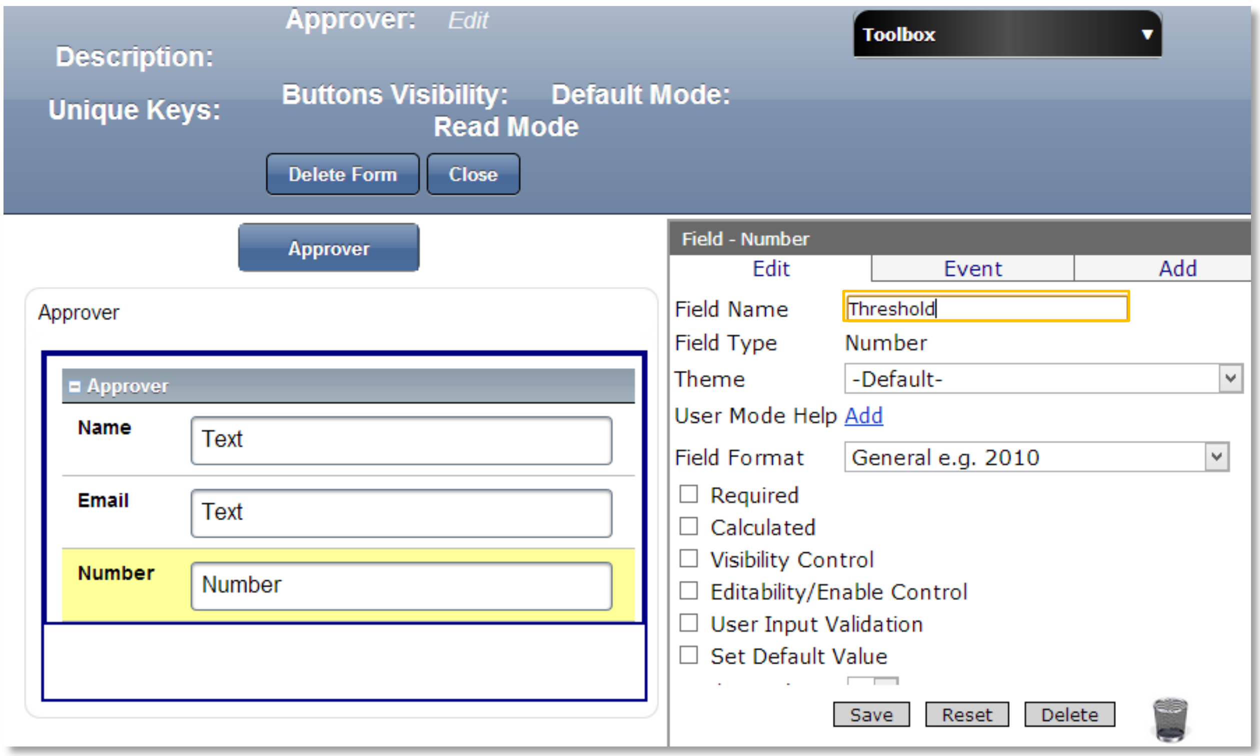
2. Click Save.

❖ Create Number Field Named Threshold



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

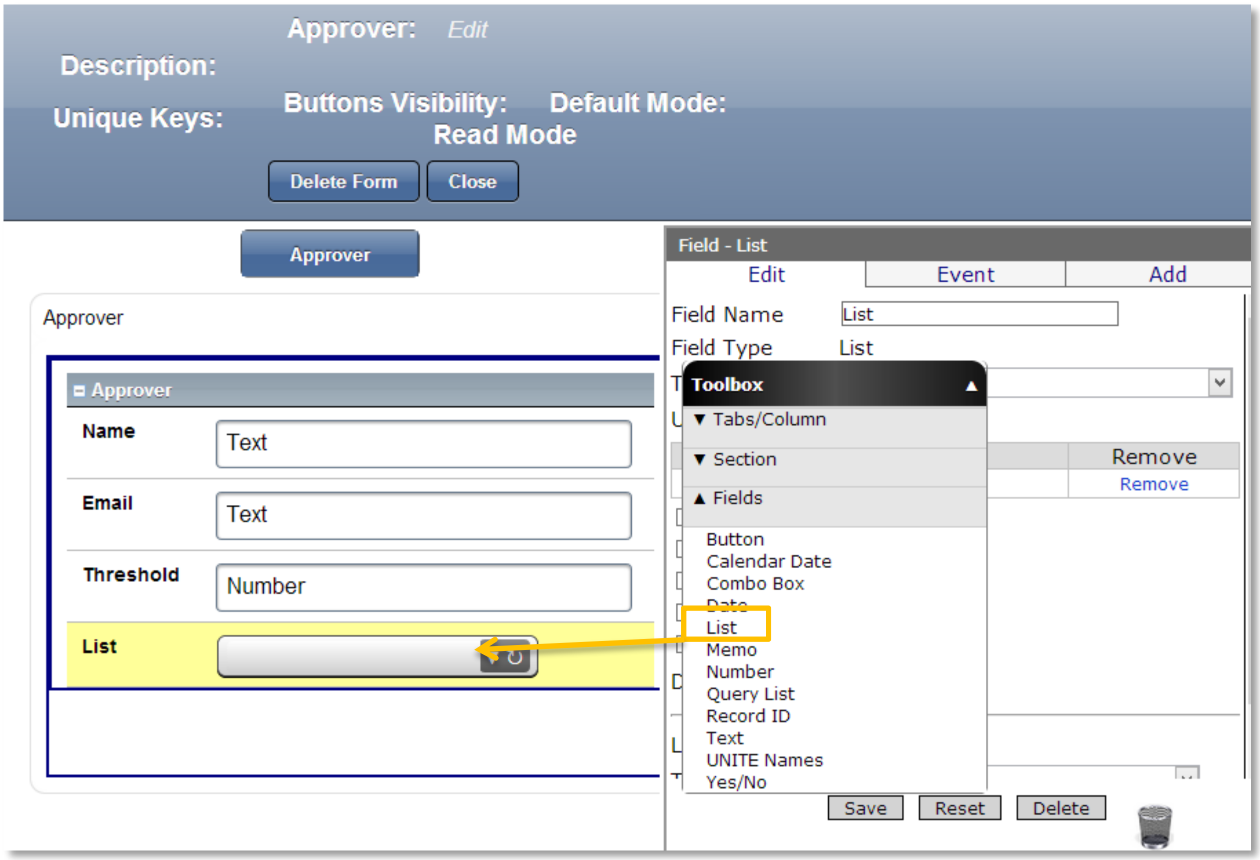
❖ Name the Number Field



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

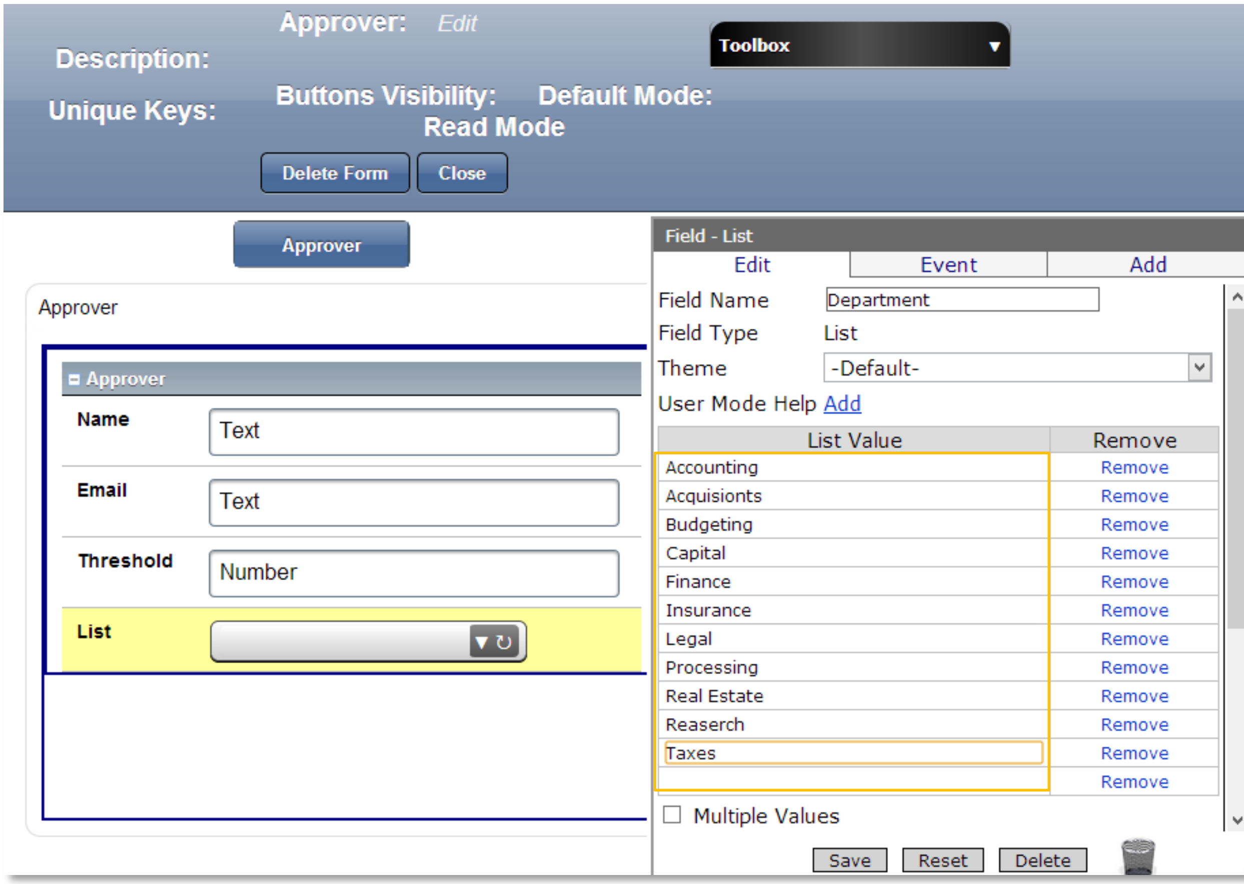
2. Click Save.

❖ Create List Field Named Department



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

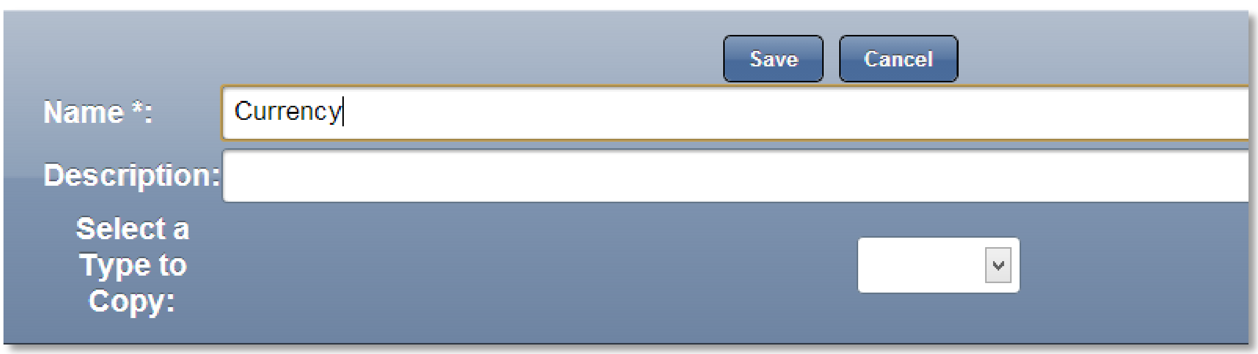
❖ Name the Text Field and enter List Values



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

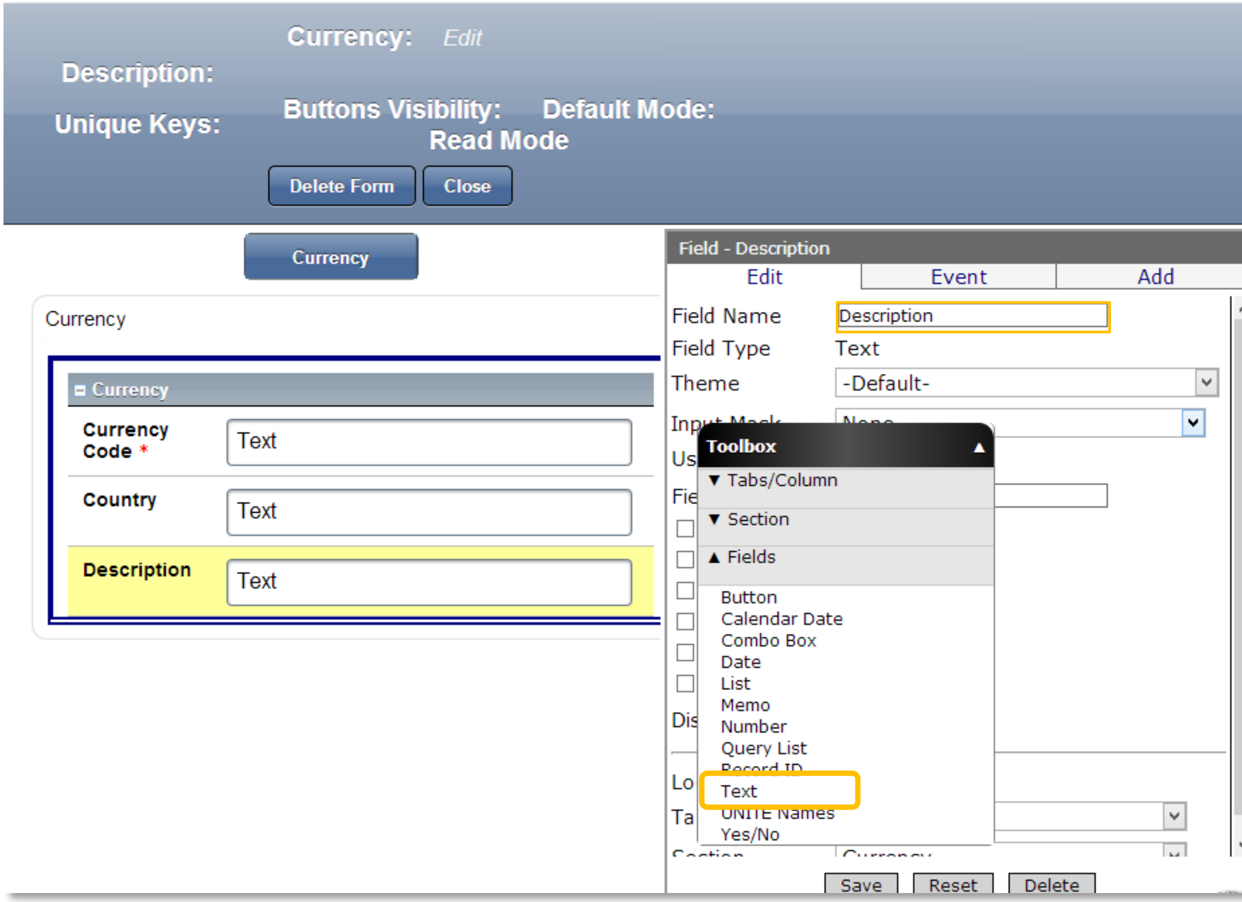
❖ Create New Form Named Currency

1. Click *Add a New Form*



2. Type Currency in the Name Field.

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

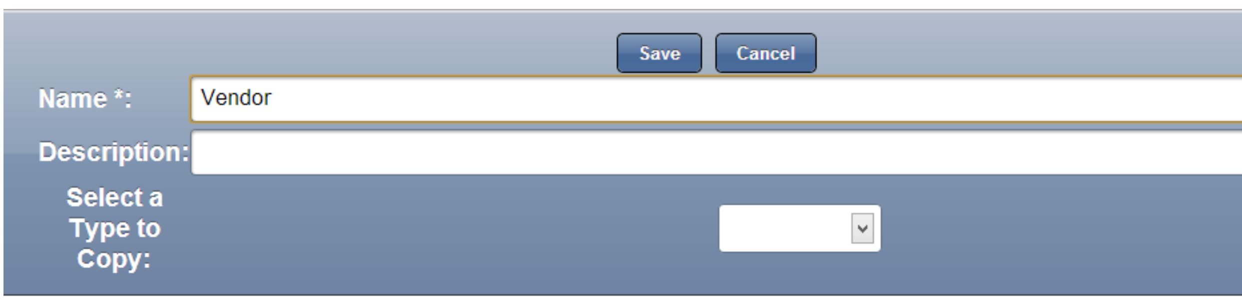


✓ Drag and drop three text fields from the Toolbox.

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.

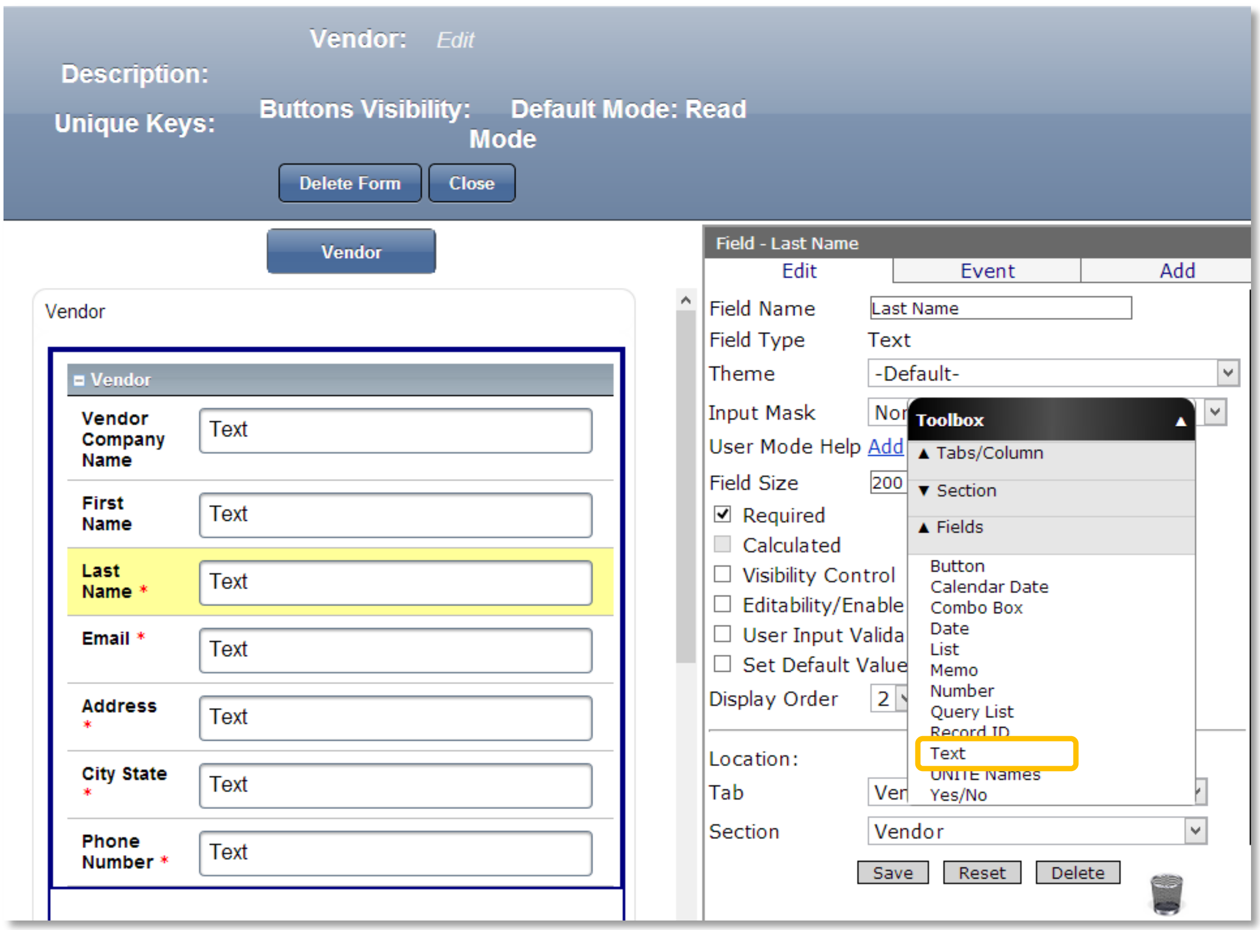
❖ Create a New Form Named Vendor

1) Click Add New Form



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

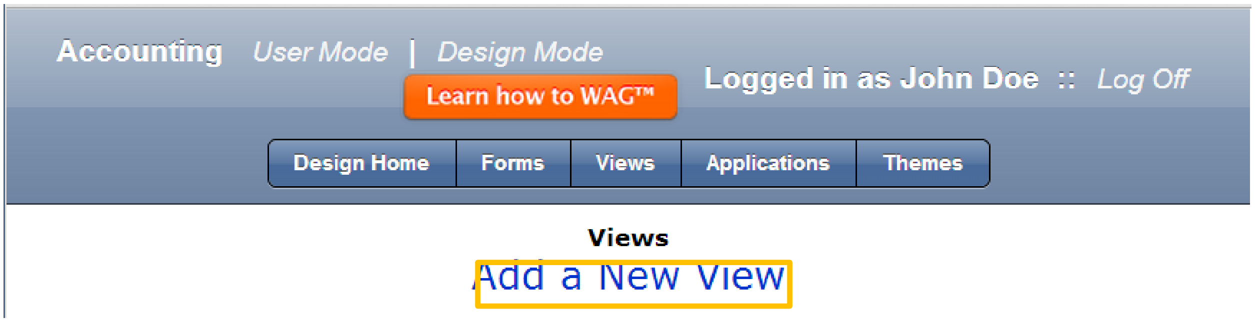
❖ Create six texts fields and Name them as shown on the screenshot.



✓ 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

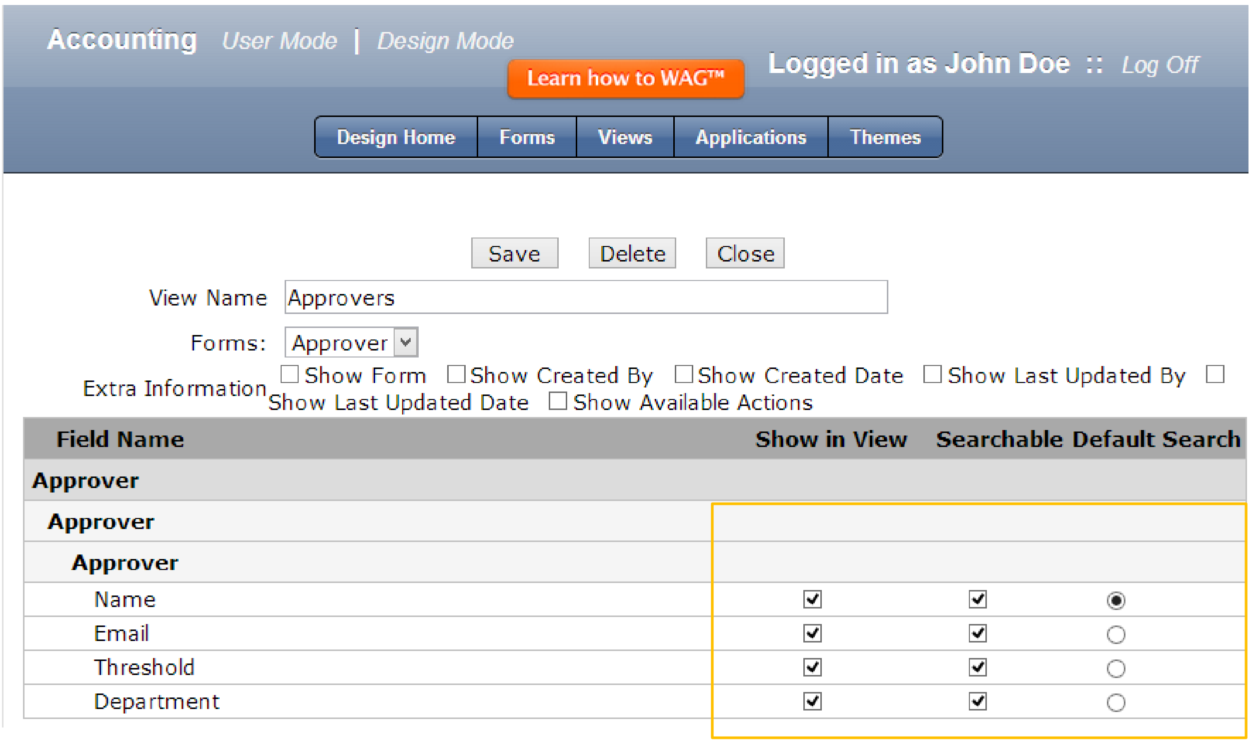


1. Click on Add New View

Key point

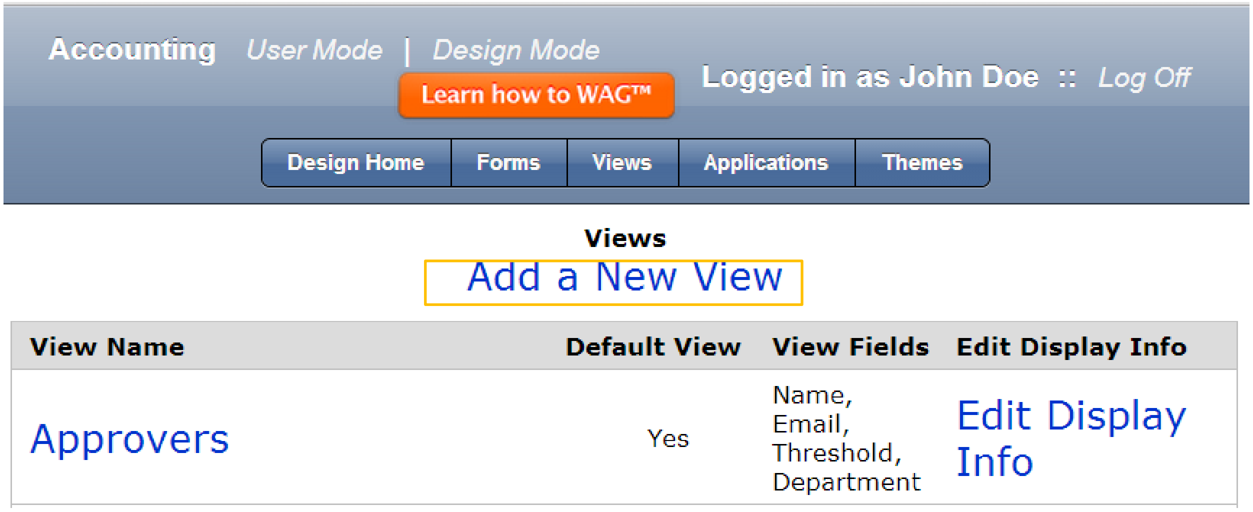
Views are to show or hide records, make them searchable, organize them in a certain order or to enter values. After you create all the Views in Design Mode you will immediately be able to try your application as a user.

❖ Name the view



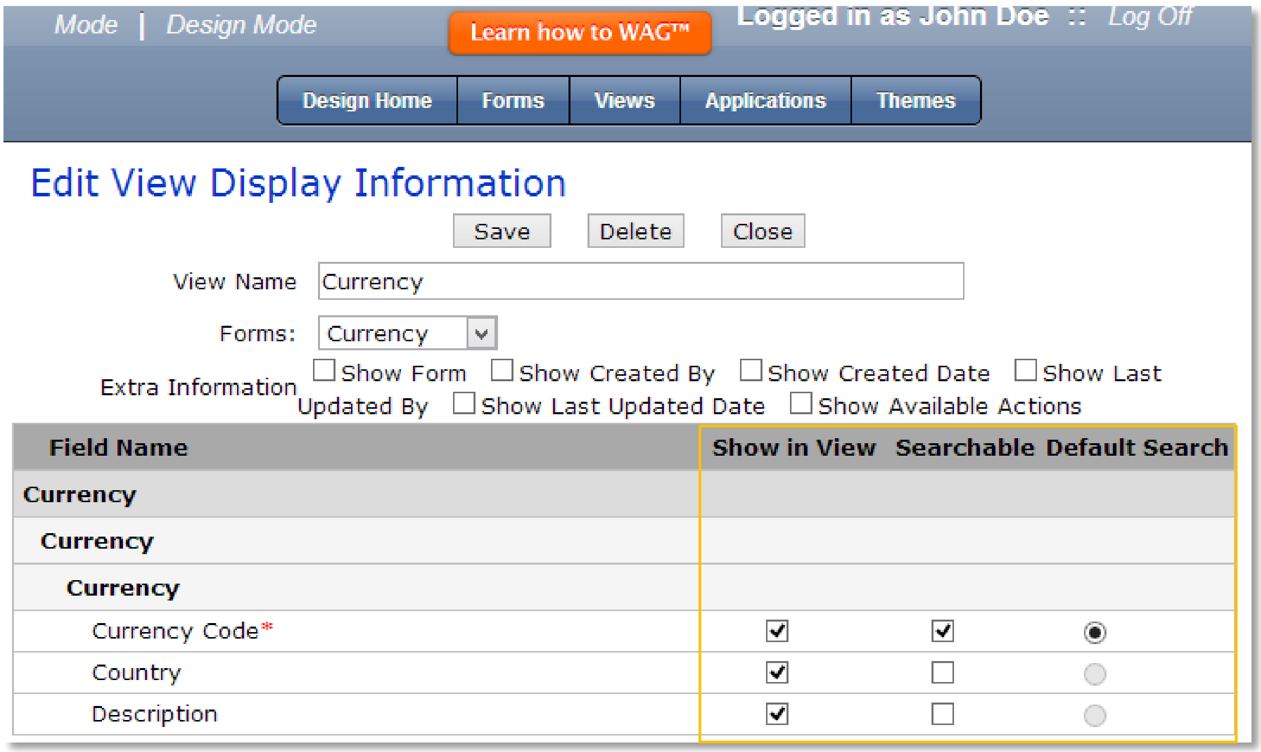
1. Type *Approvers* in the View Name
2. Check the boxes along the **Name, Email, Threshold, Department** as shown on the screen
3. Click *Save*

❖ Add view for Currency Form.



1. Click on Add a New View

❖ Name the new view.

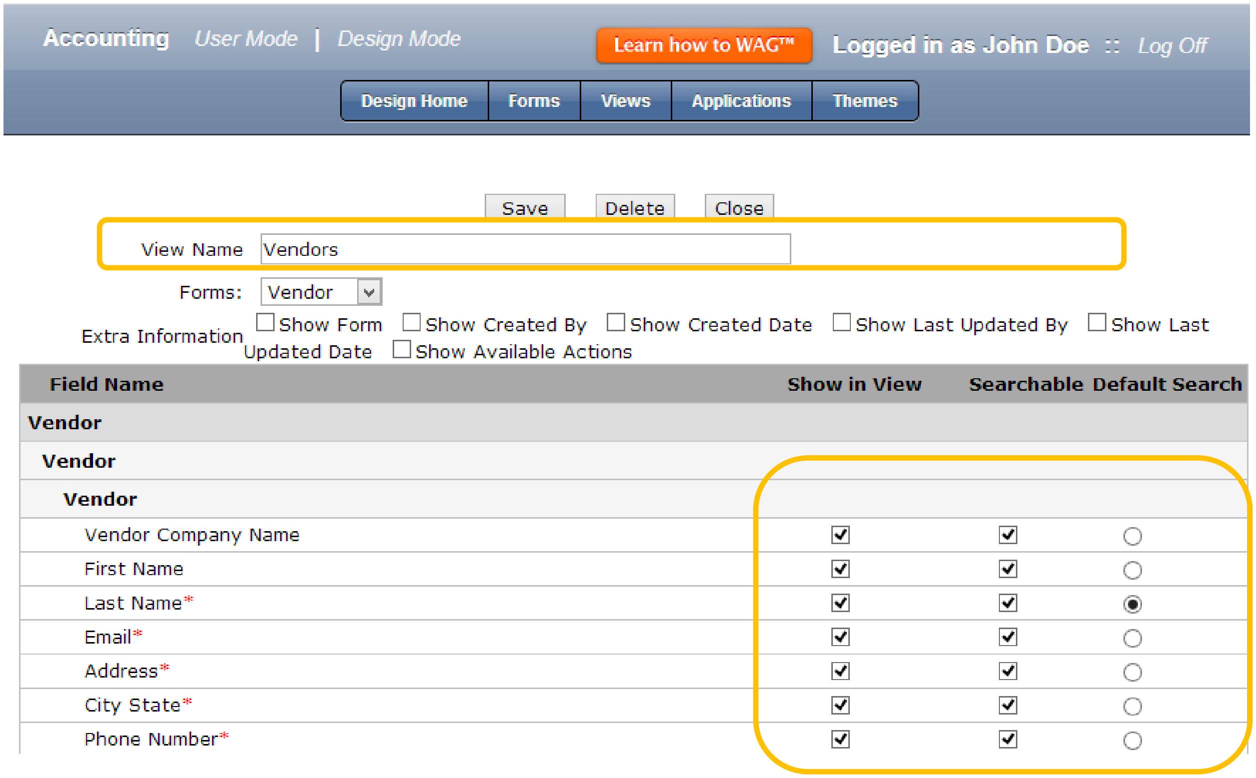


2. Type Currency in the View Name
3. Chose Currency from the drop down list next to forms
4. Check the boxes as shown on the screenshot for Currency code, country and description.

❖ Create View For Vendors

Click *Add New View*

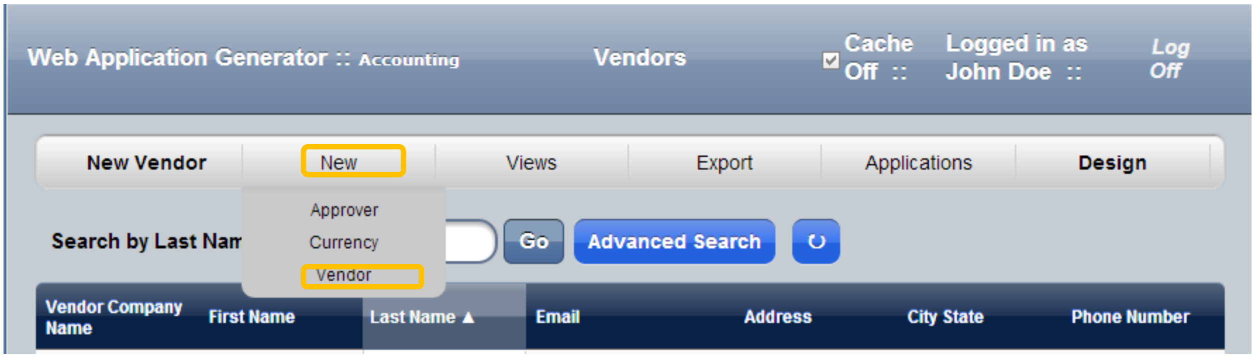
❖ Name the New View



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

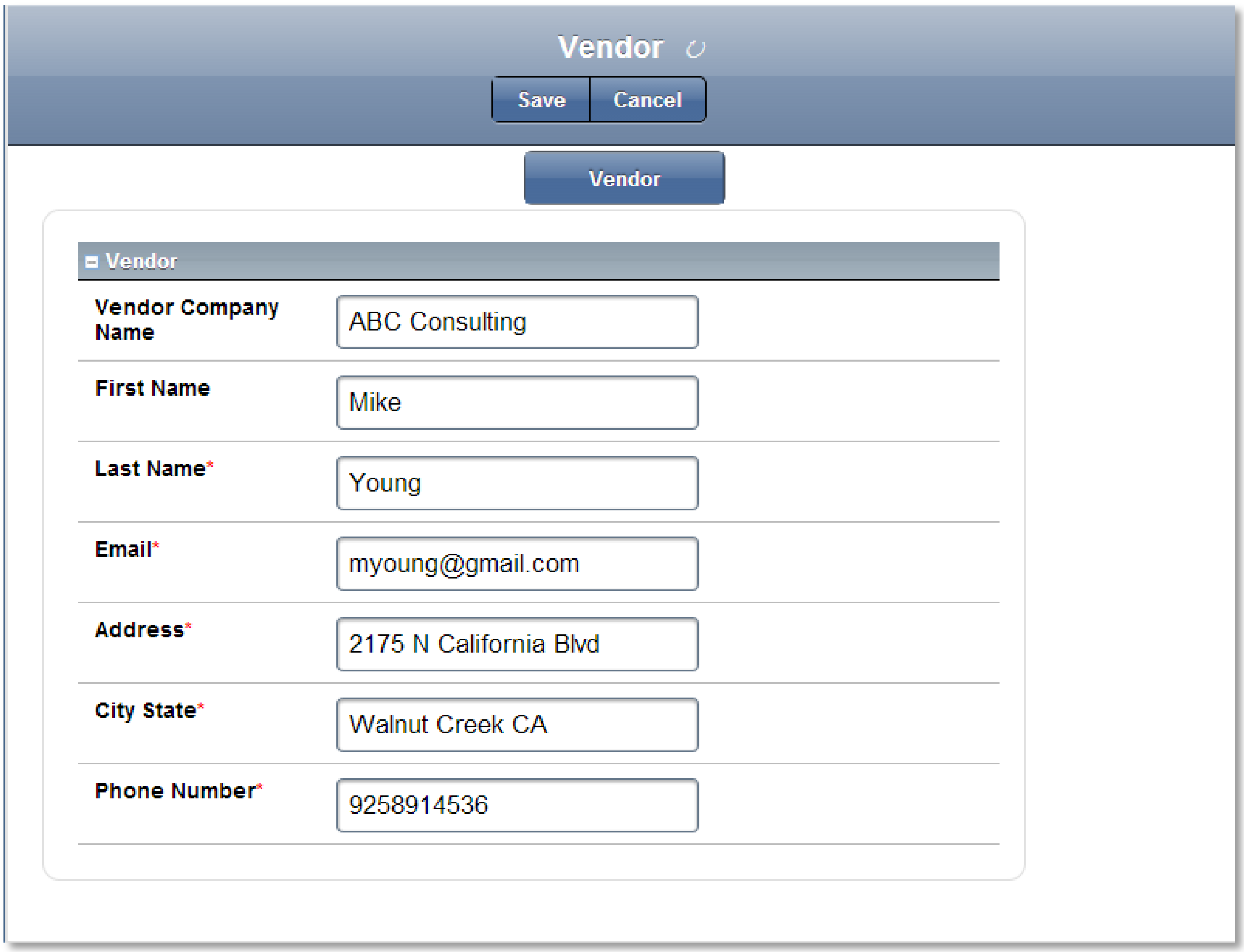
   Click Save

❖ Creating Vendors



1. In the User Mode Click on New

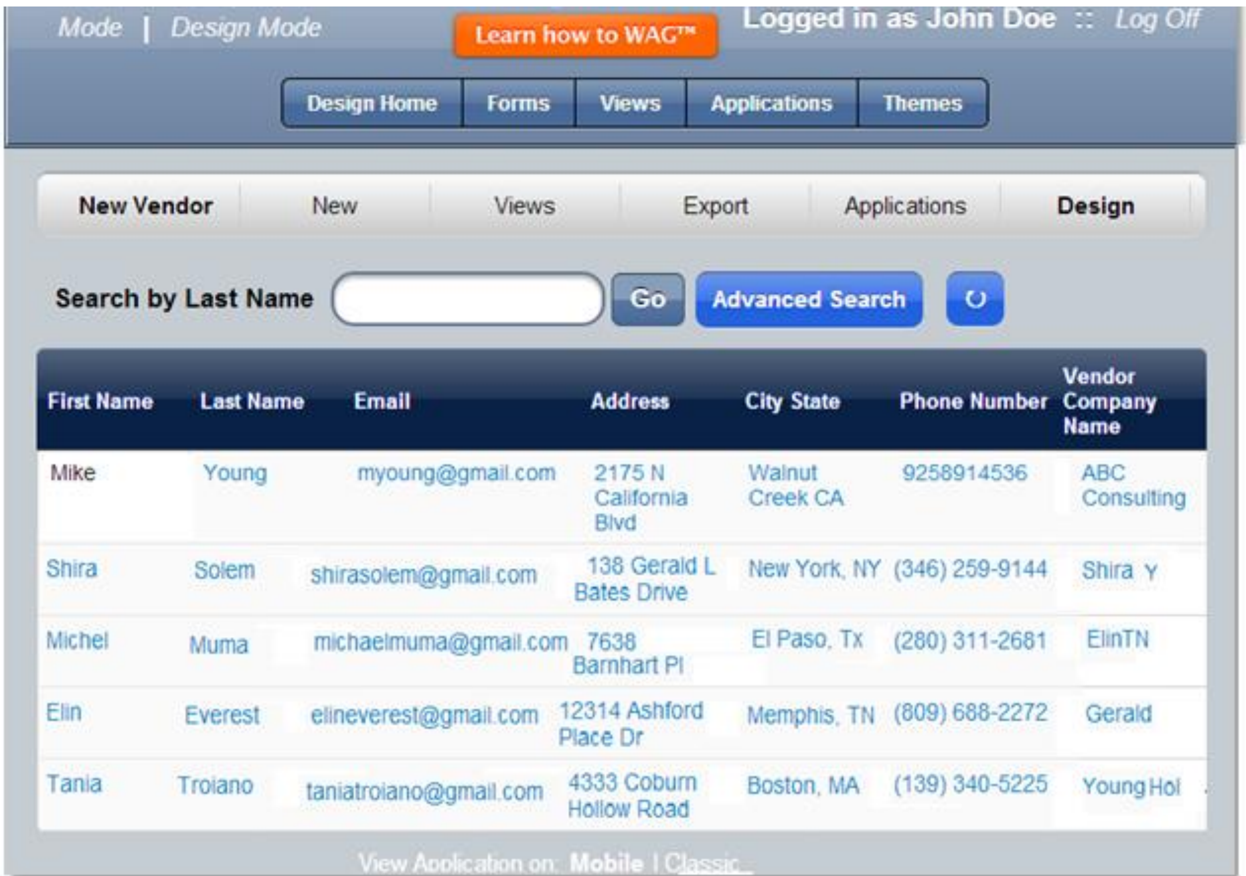
2. Choose Vendor from the drop down List



✓ 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

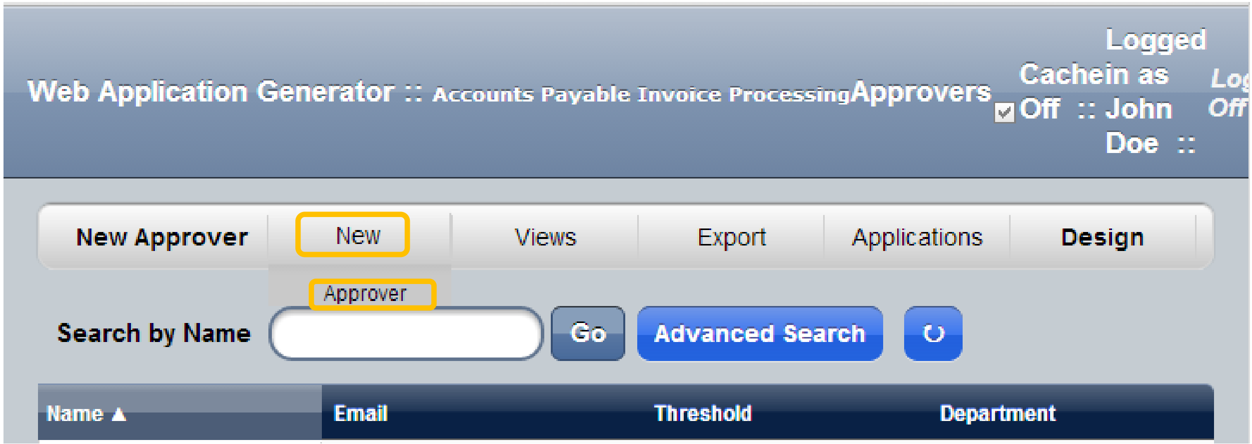
1. Click *Save*



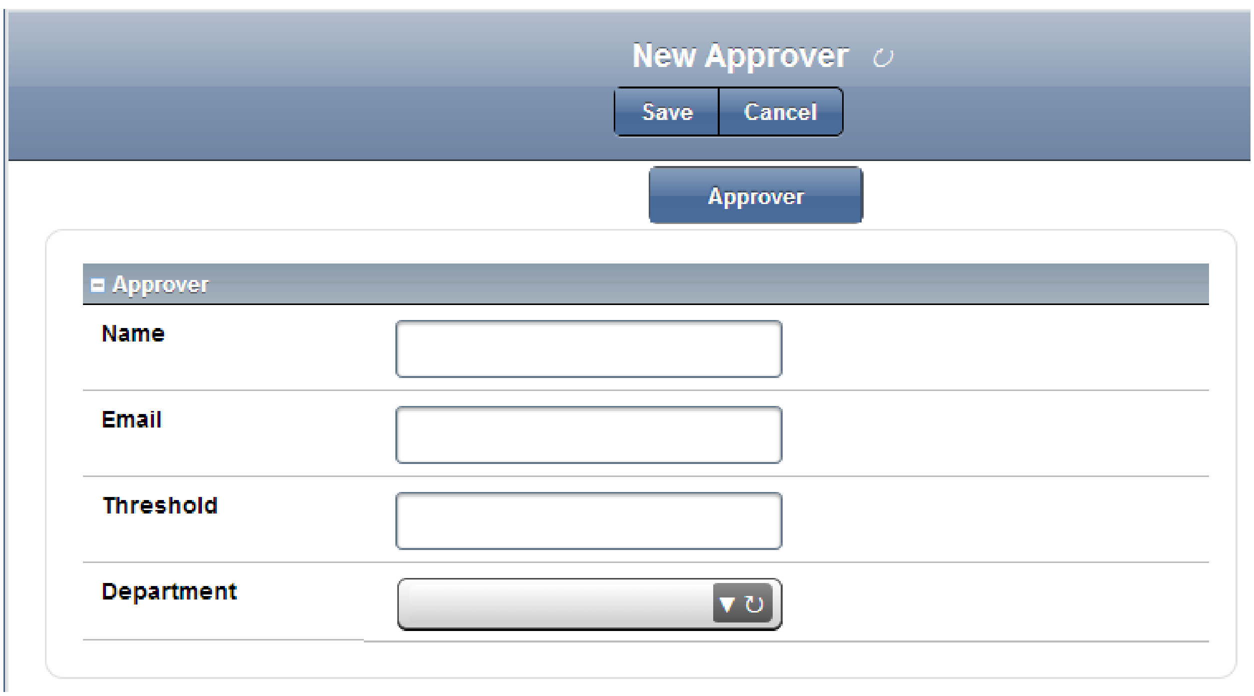
✓ Keep entering other Vendors; you can use the data from the Table below.

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

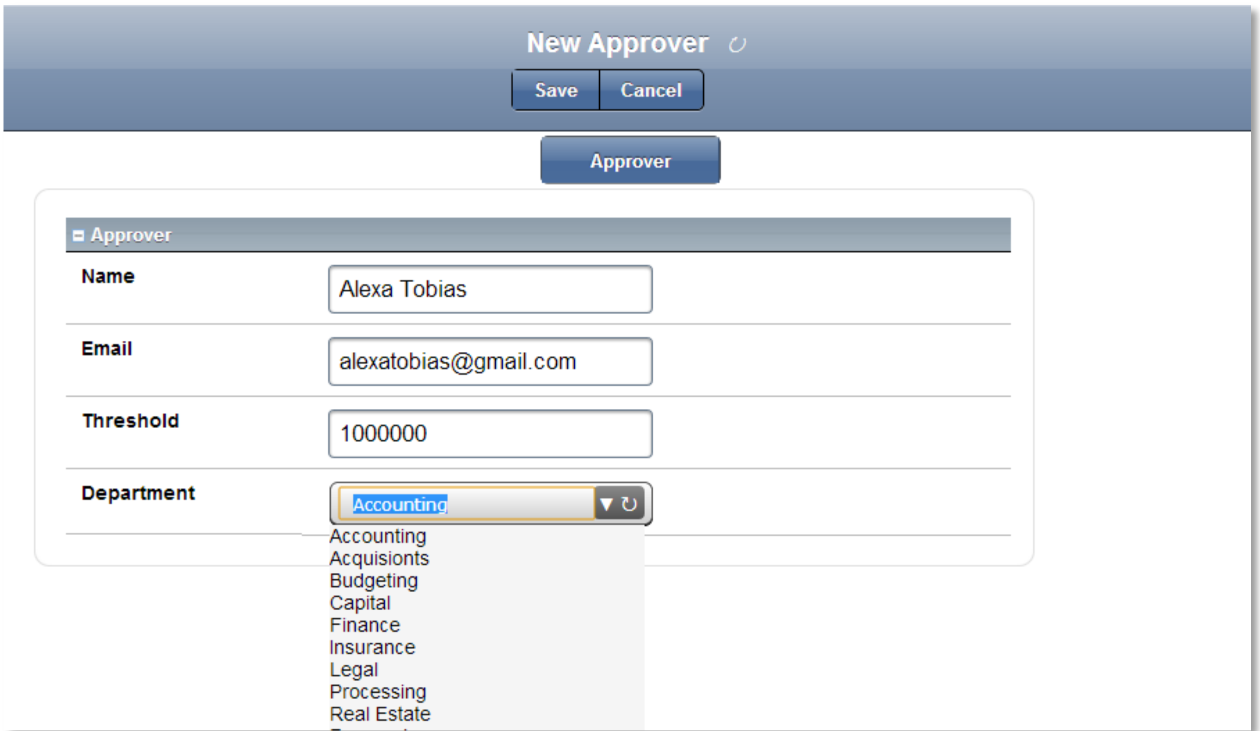
❖ Adding Approvers

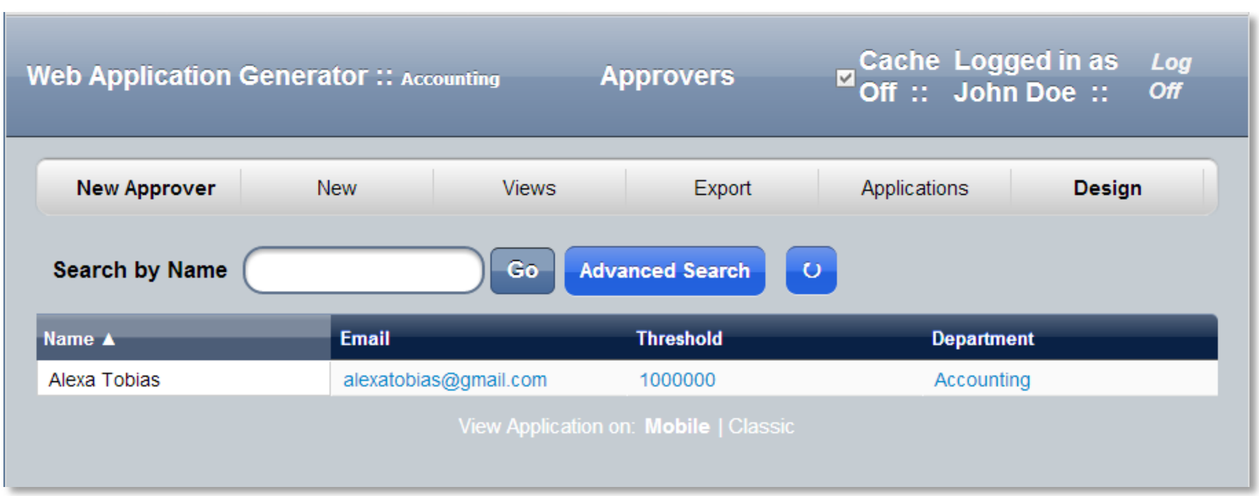


1. Click on User Mode
2. Click New
3. Click Approver from the drop down list



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

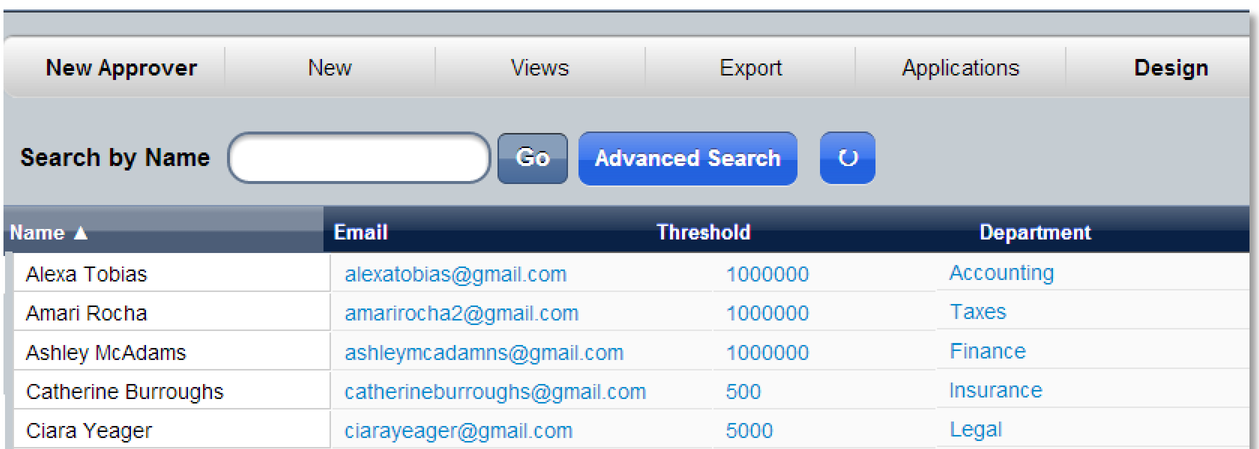




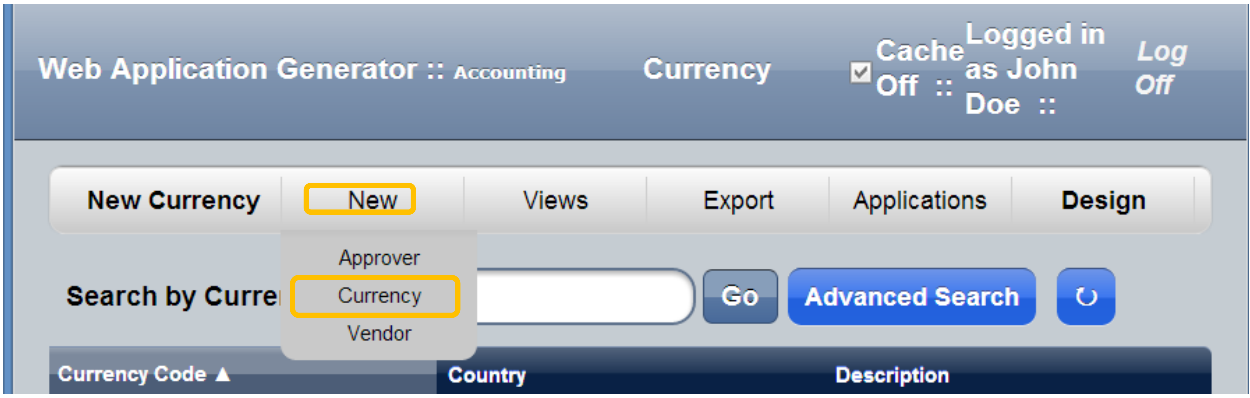
- ✓ This is what it looks like in the Approvers list
- ✓ Similarly add other approvers using data from the table

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

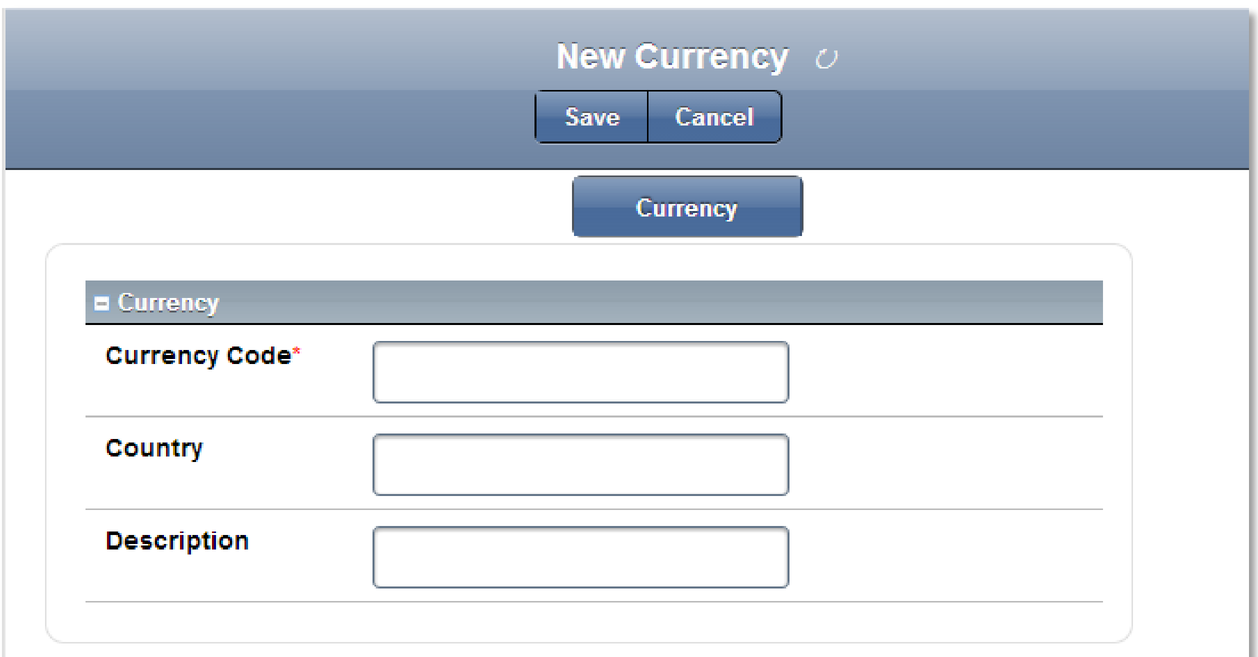
✓ This is what your Approvers list should look like



❖ Adding Currencies



1. In the User Mode go to New Currency:



2. In this New Currency view, add following:

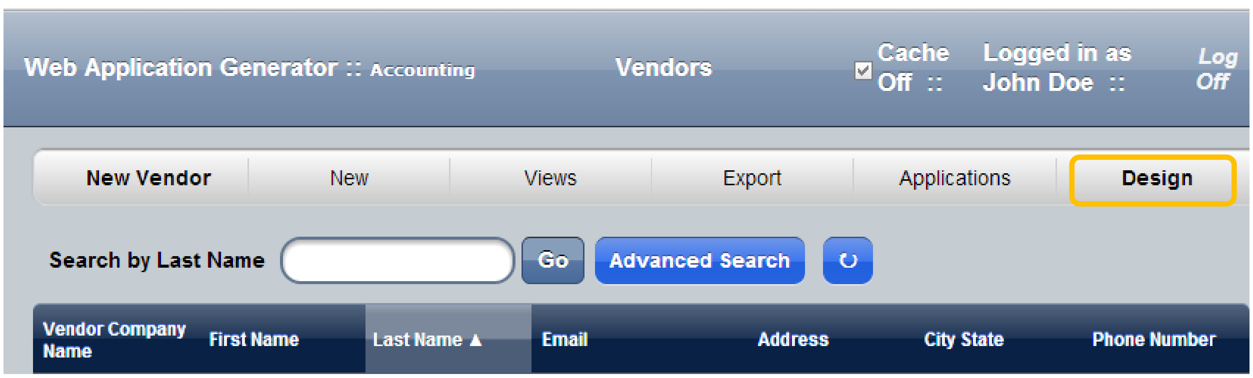
Currency Code:	Country:	Description
USD	United States	United States Dollar.

3. Click Save.

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

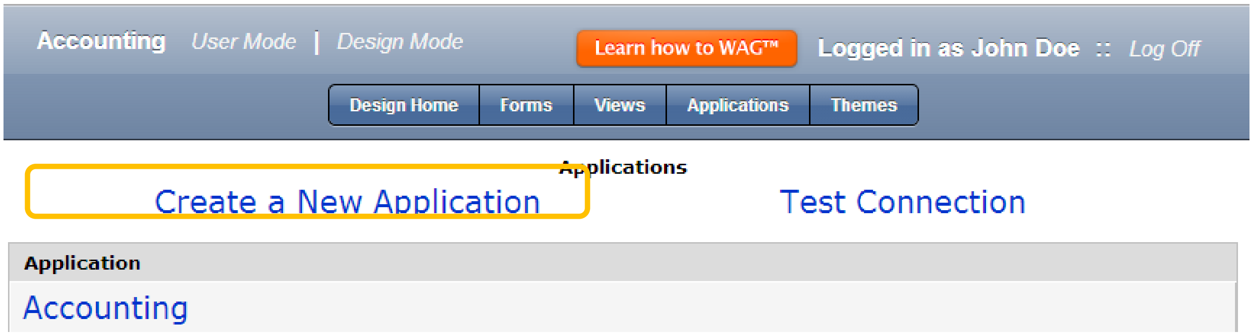
Currency Code	Country	Description
USD	United State	United States Dollar
CAD	Canada	Canadian Dollar
CNY	China	Chinese Yuan
BRL	Brazil	Brazilian Real

1. Click Design



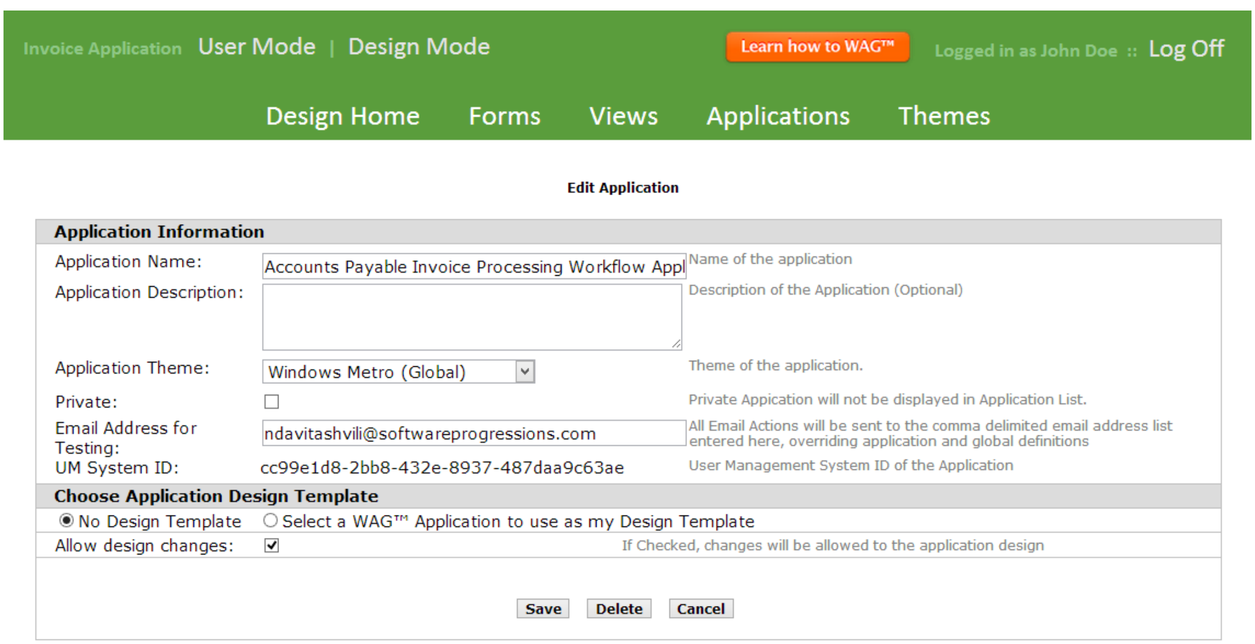
2. click Applications,

3. Click Accounts Payable Invoice Processing Workflow Application.



4. Click Create a New Application

❖ Name the New Application



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

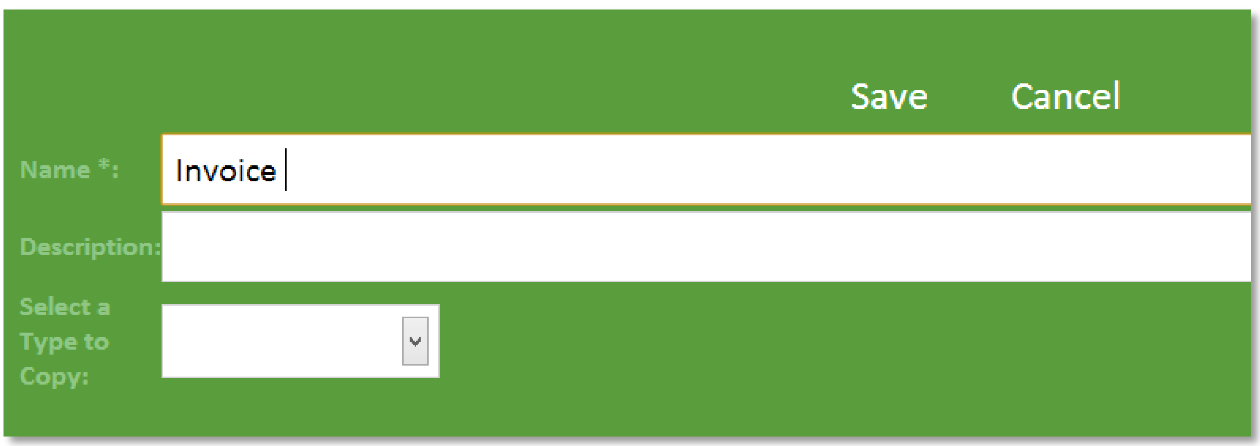
❖ Creating a New Form

Design Mode

Key Point

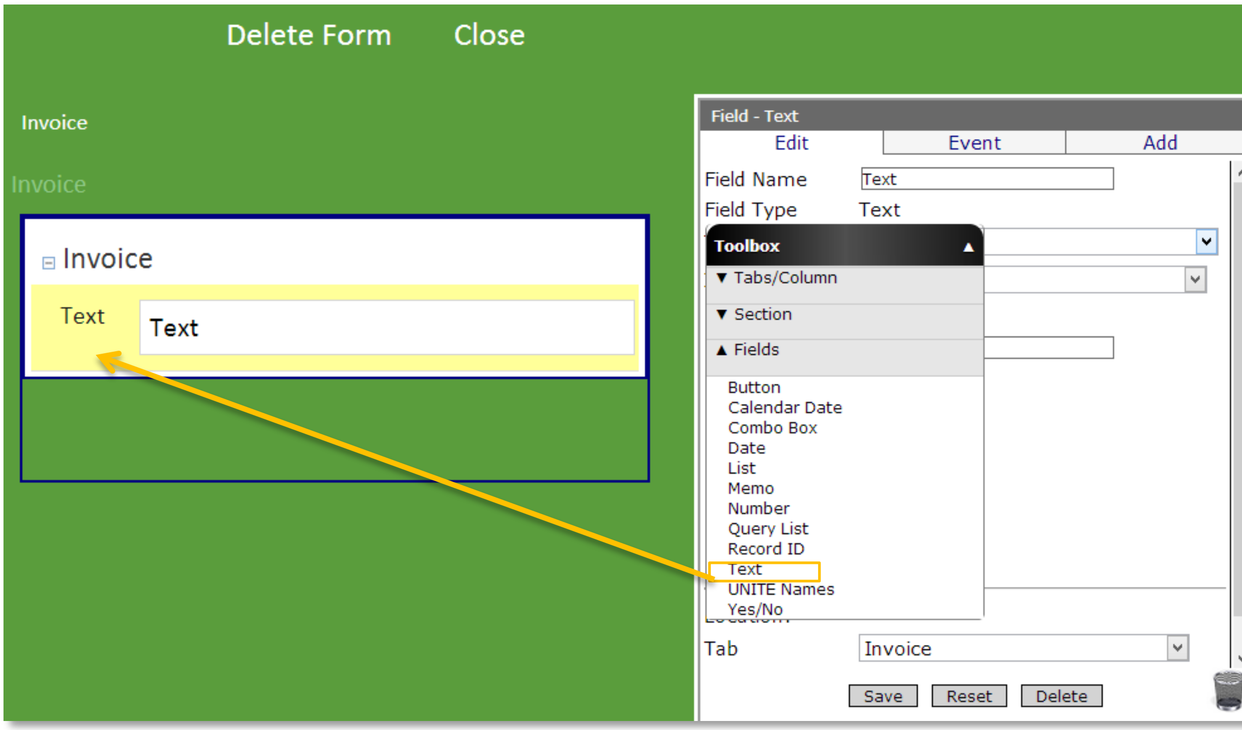
Design Mode is where you to create your app.

2. Click Add a New Form.



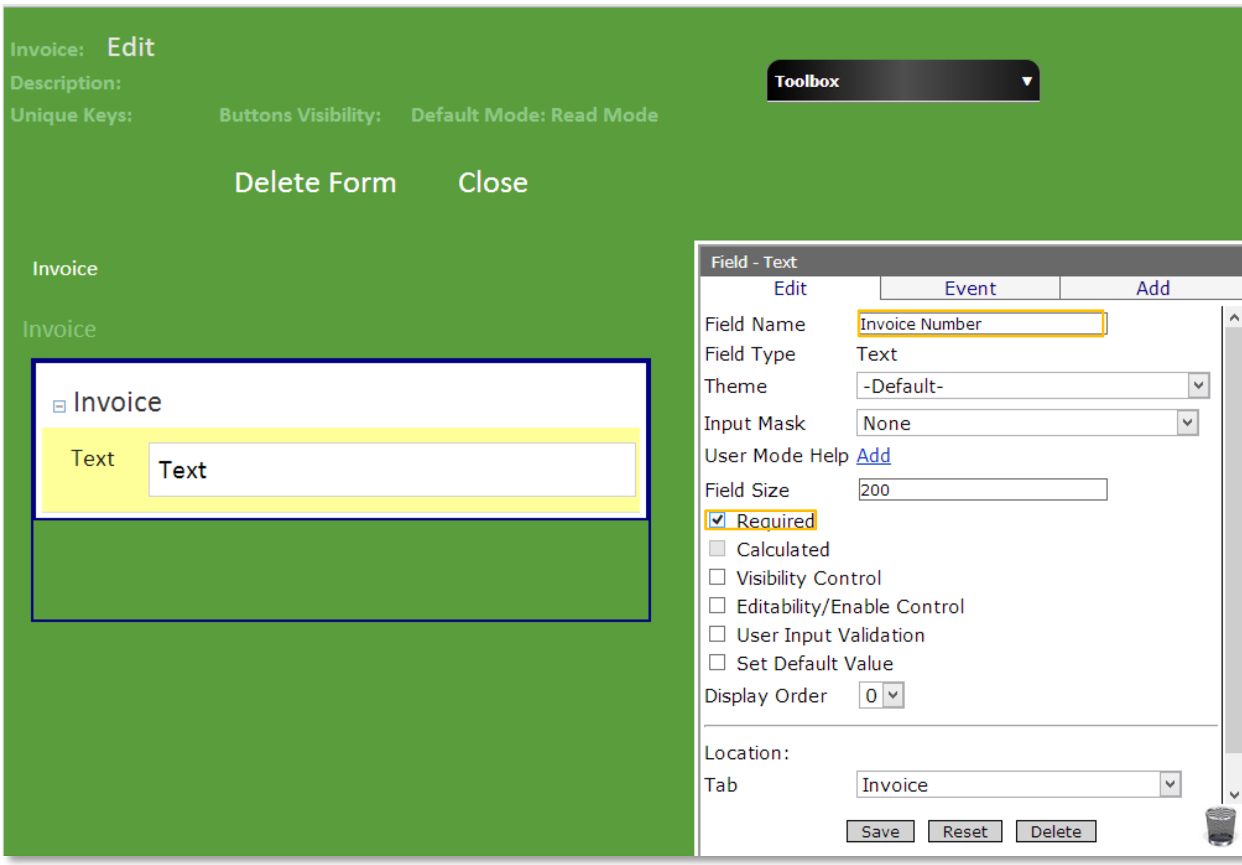
3. Name this form "Invoice" and Click Save.

❖ Creating a Text field named Invoice Number



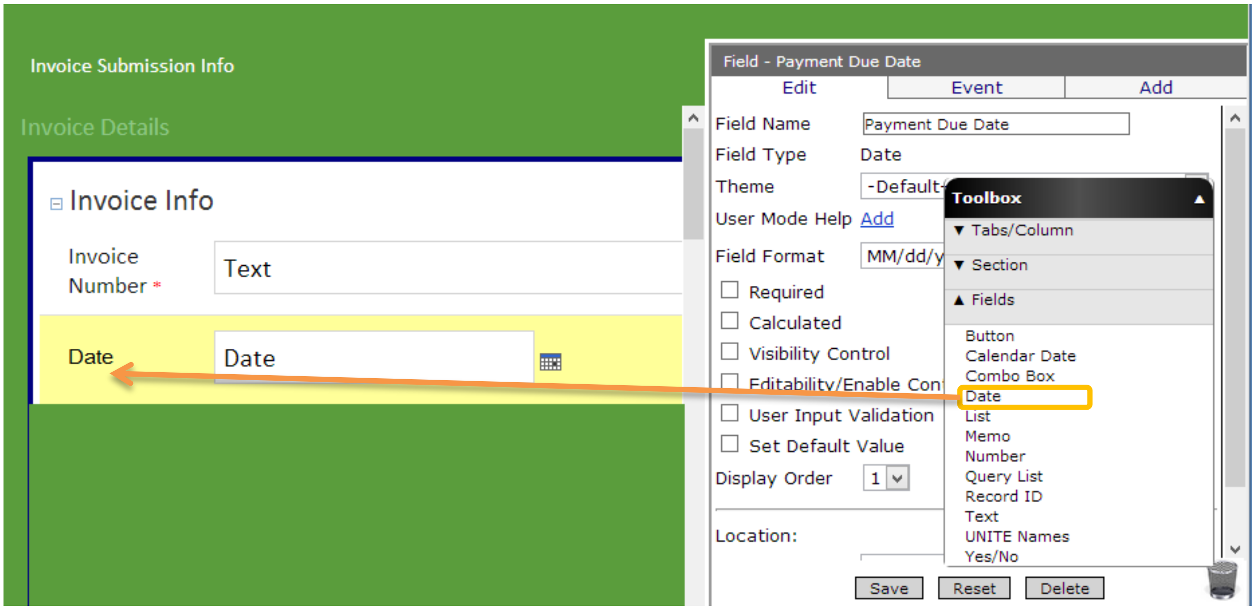
✓ Drag and drop a Text Field from the Toolbox into the Invoice Section.

❖ Name the Text Field



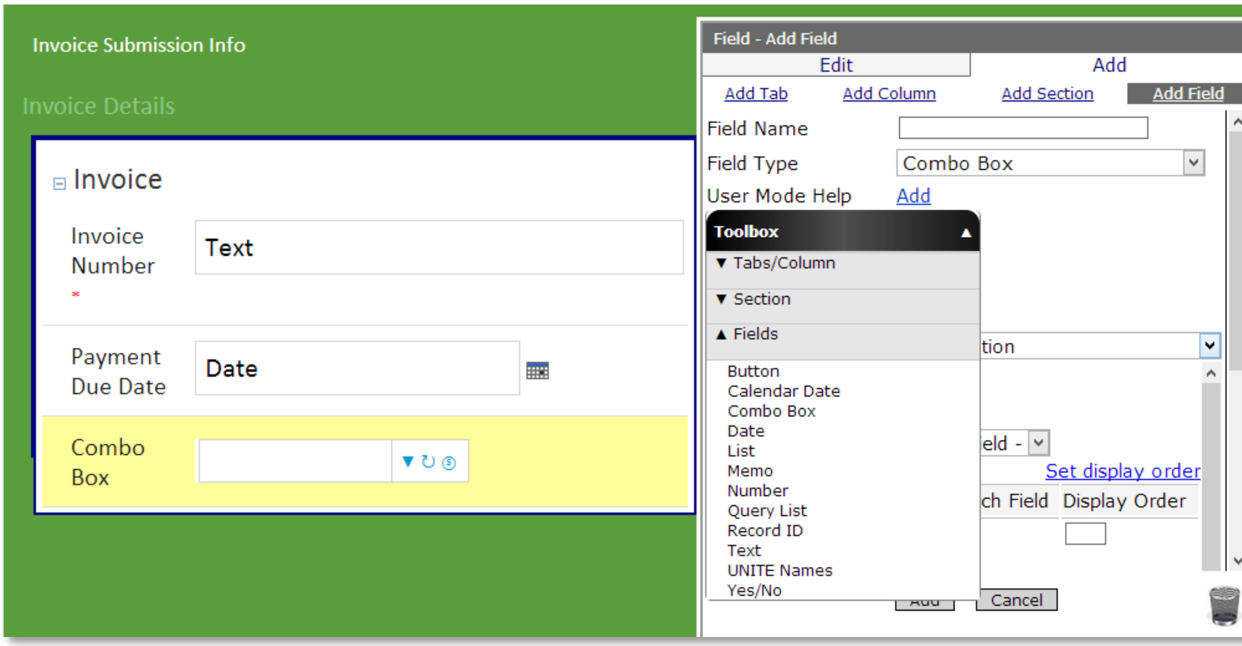
1. In the Properties box type Invoice Number In the Field Name
2. Check the Required box.
3. Click Save.

❖ 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.

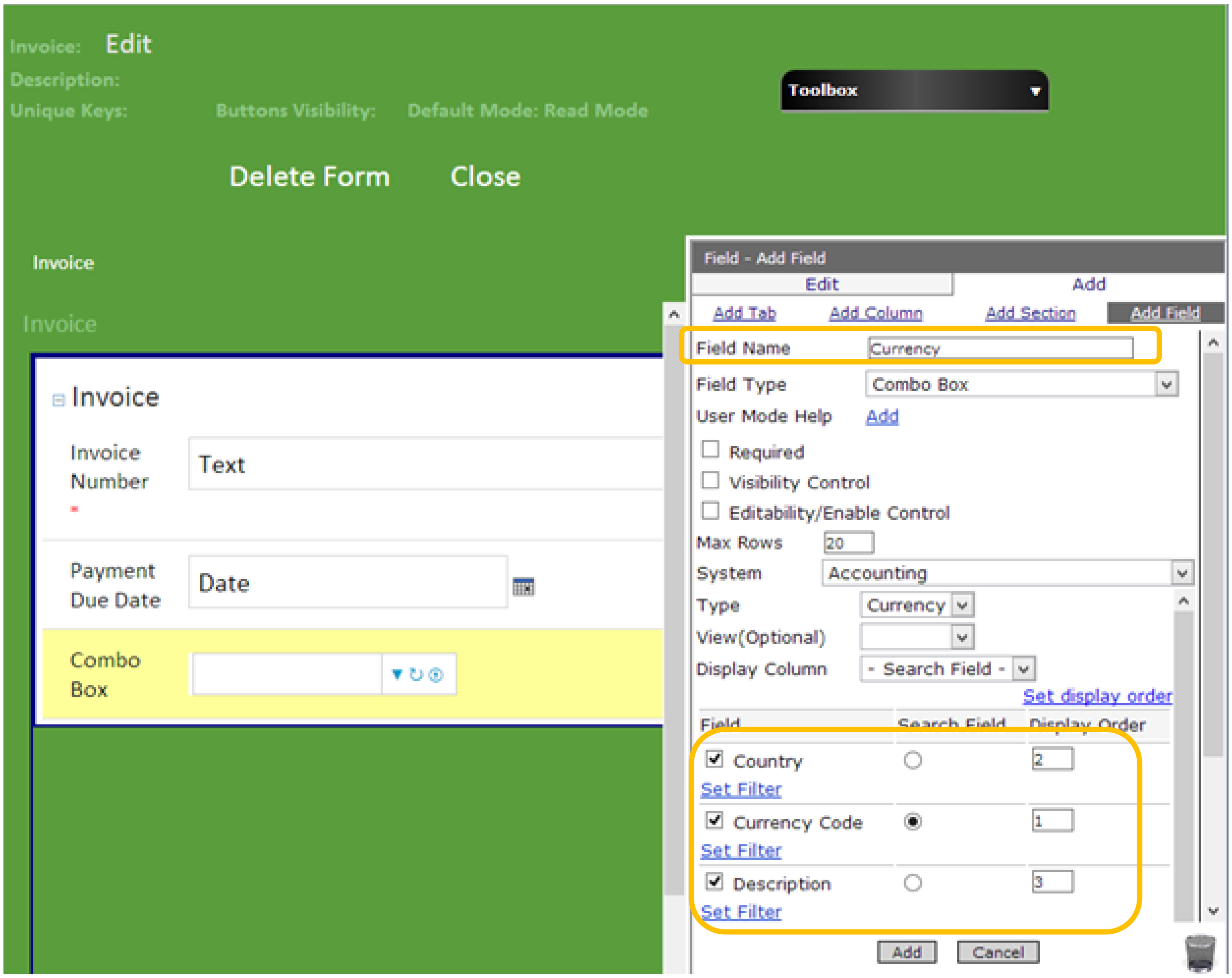
✓ Drag and drop a Combo Box field into our form.

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

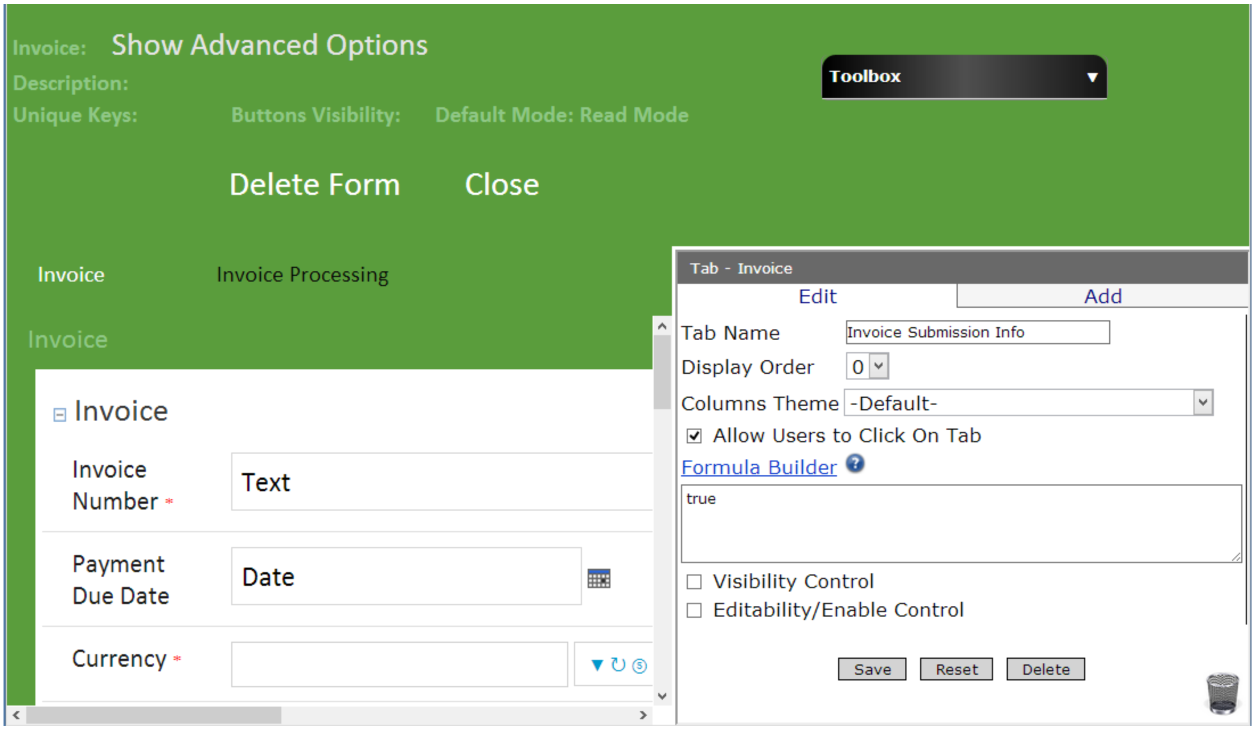
Combo boxes allow you to view and search through an object's data to ultimately choose a single record.

❖ 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

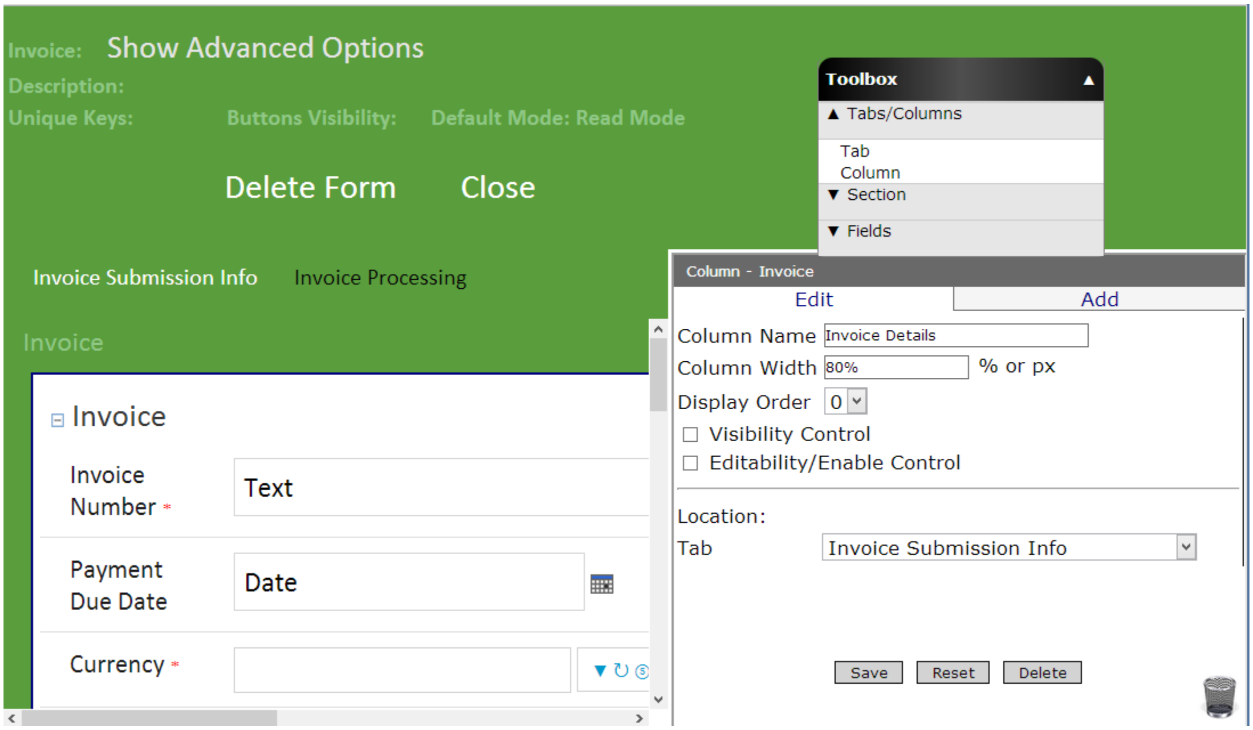
Rename the Tab Invoice to Invoice Submission Info



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

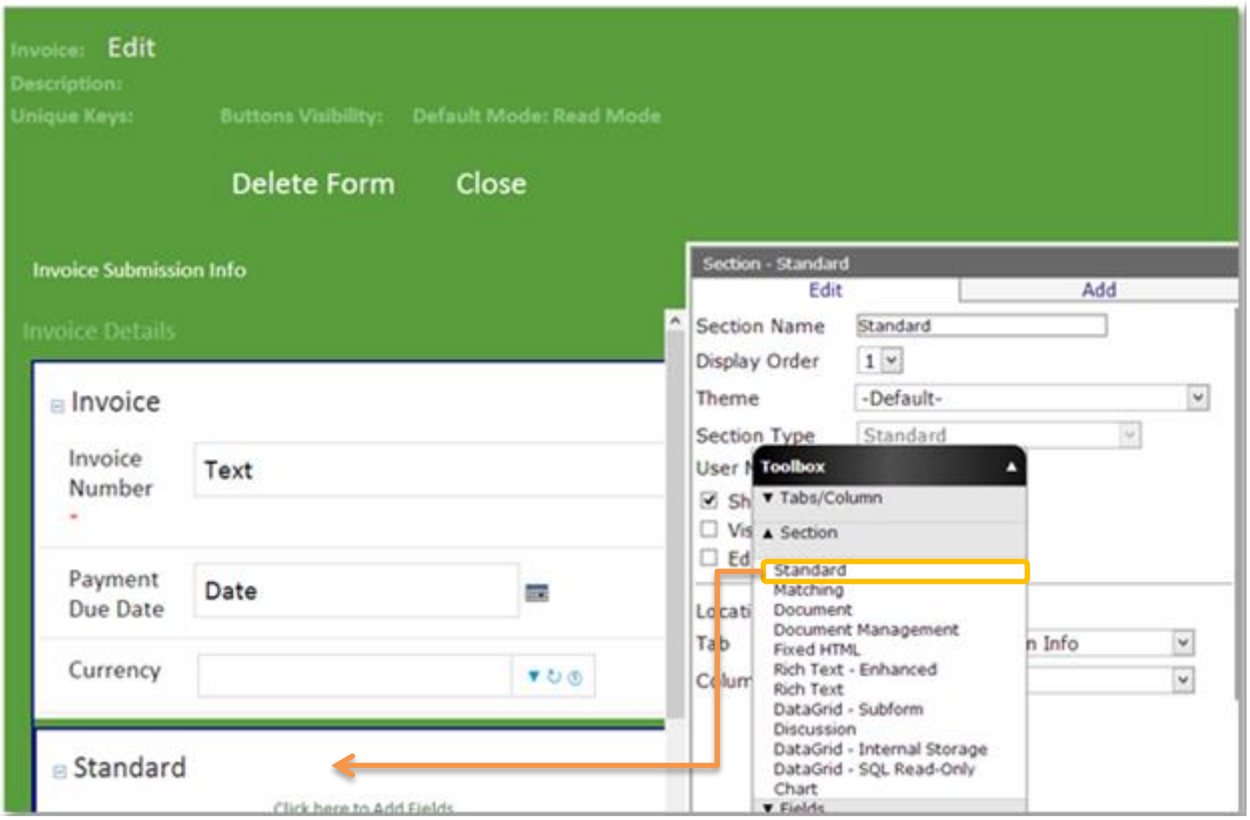
2. Click Save

❖ Rename Column Named Invoice to Invoice Details.



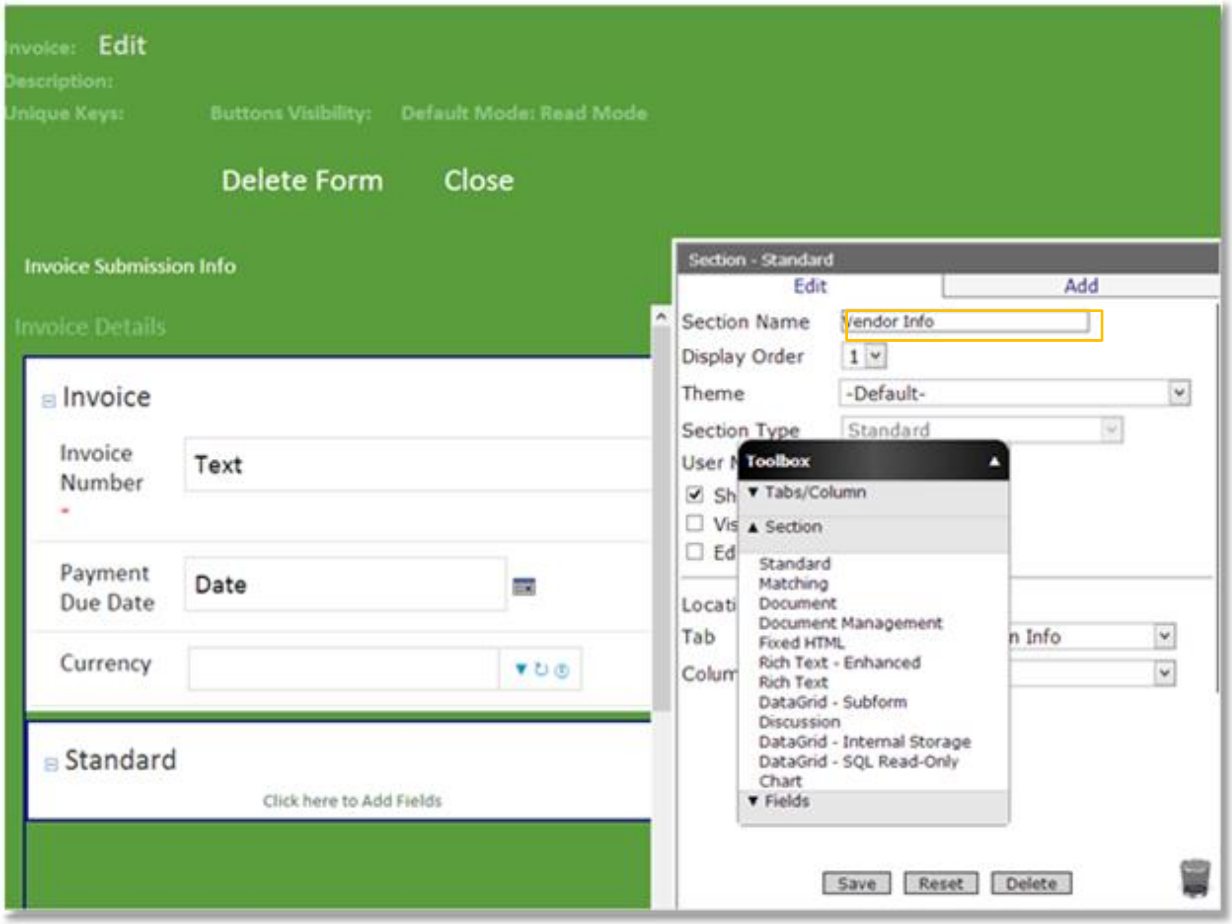
1. In the Properties Box Click in Column Name and type Invoice Details
2. Click Save.

❖ Creating the Standard Section Named Vendor Info



✓ Drag and drop a new Standard Section from the Toolbox

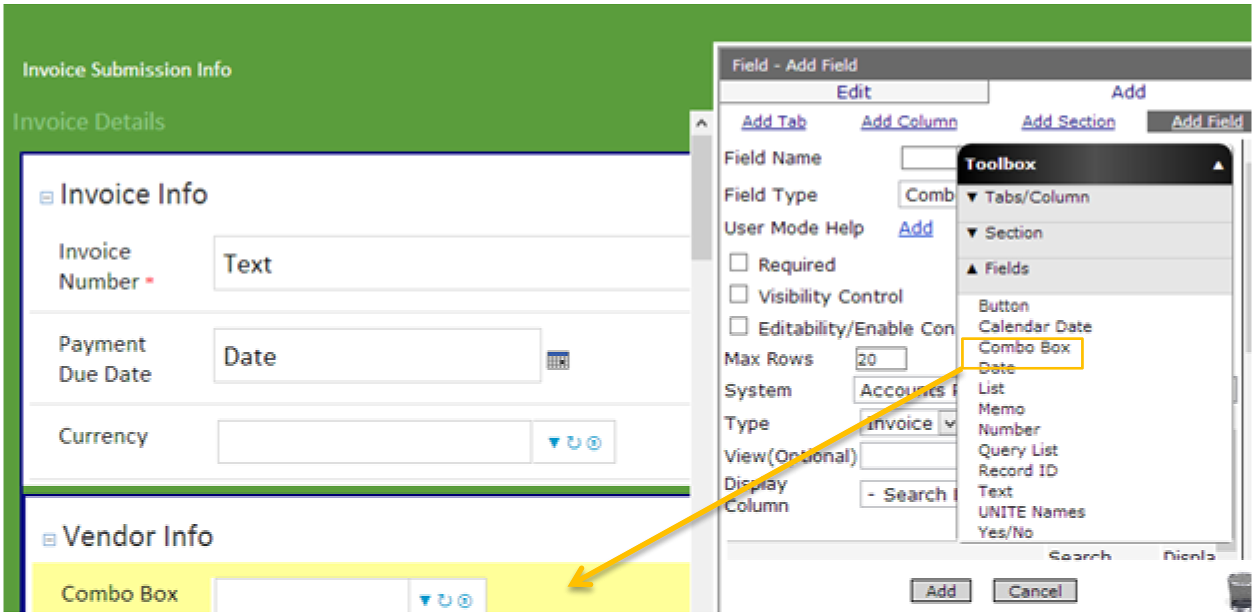
❖ Name the Standard Section



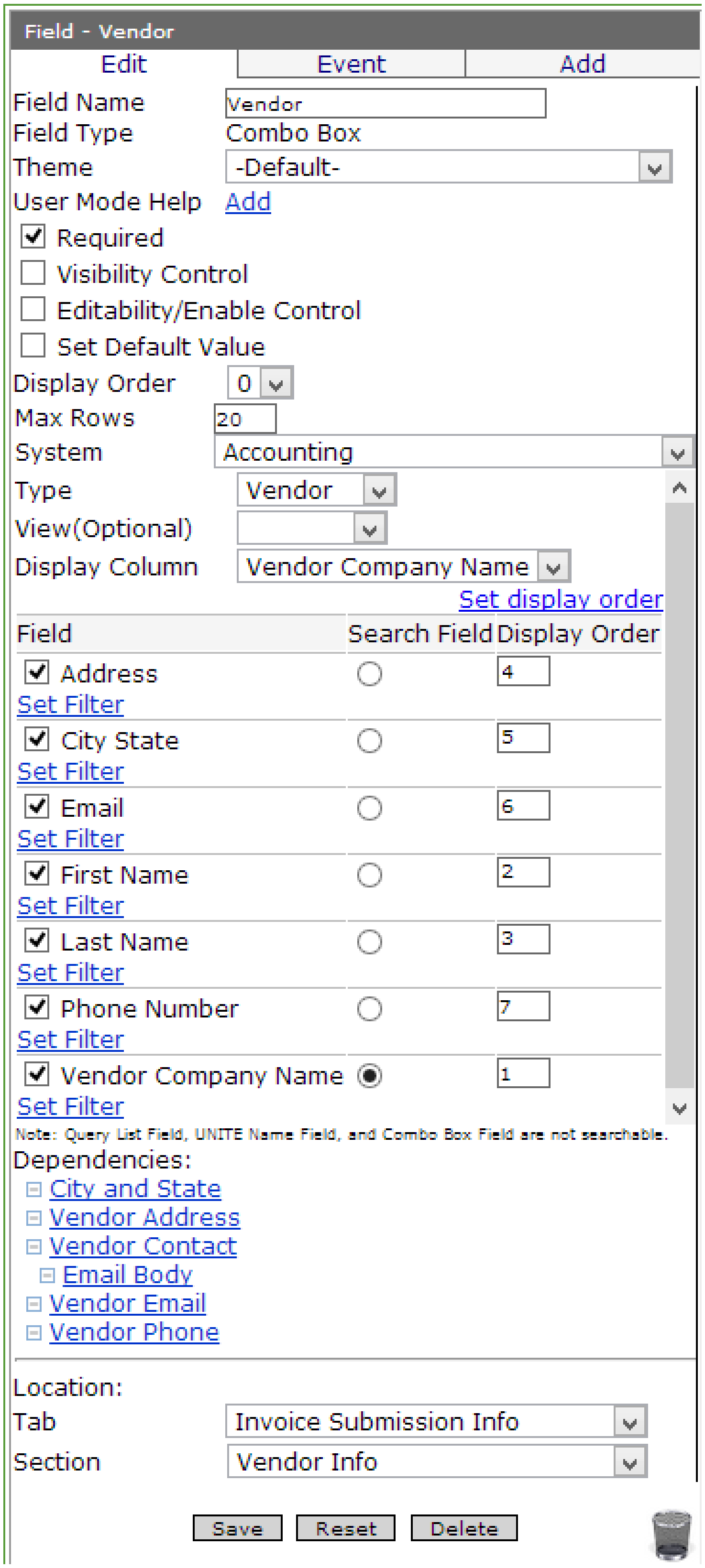
1. In the Properties Box click in Section Name and type "Vendor Info"

2. Click Save

❖ Create Combo Box Named Vendor



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



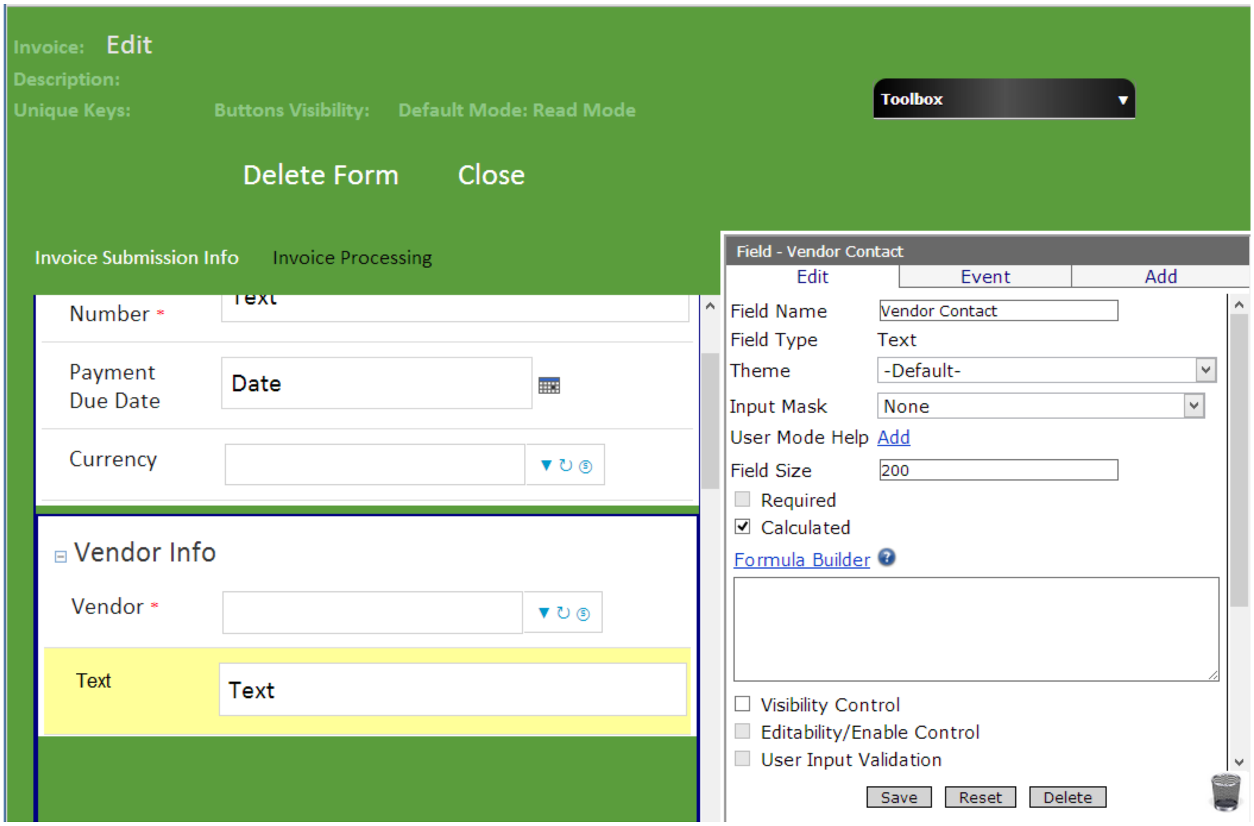
❖ Name the Combo Box

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 a as the Search Field.
3. Number the fields in Display Order in the order shown on the screen
4. Select Vendor Company Name a as the Display Column

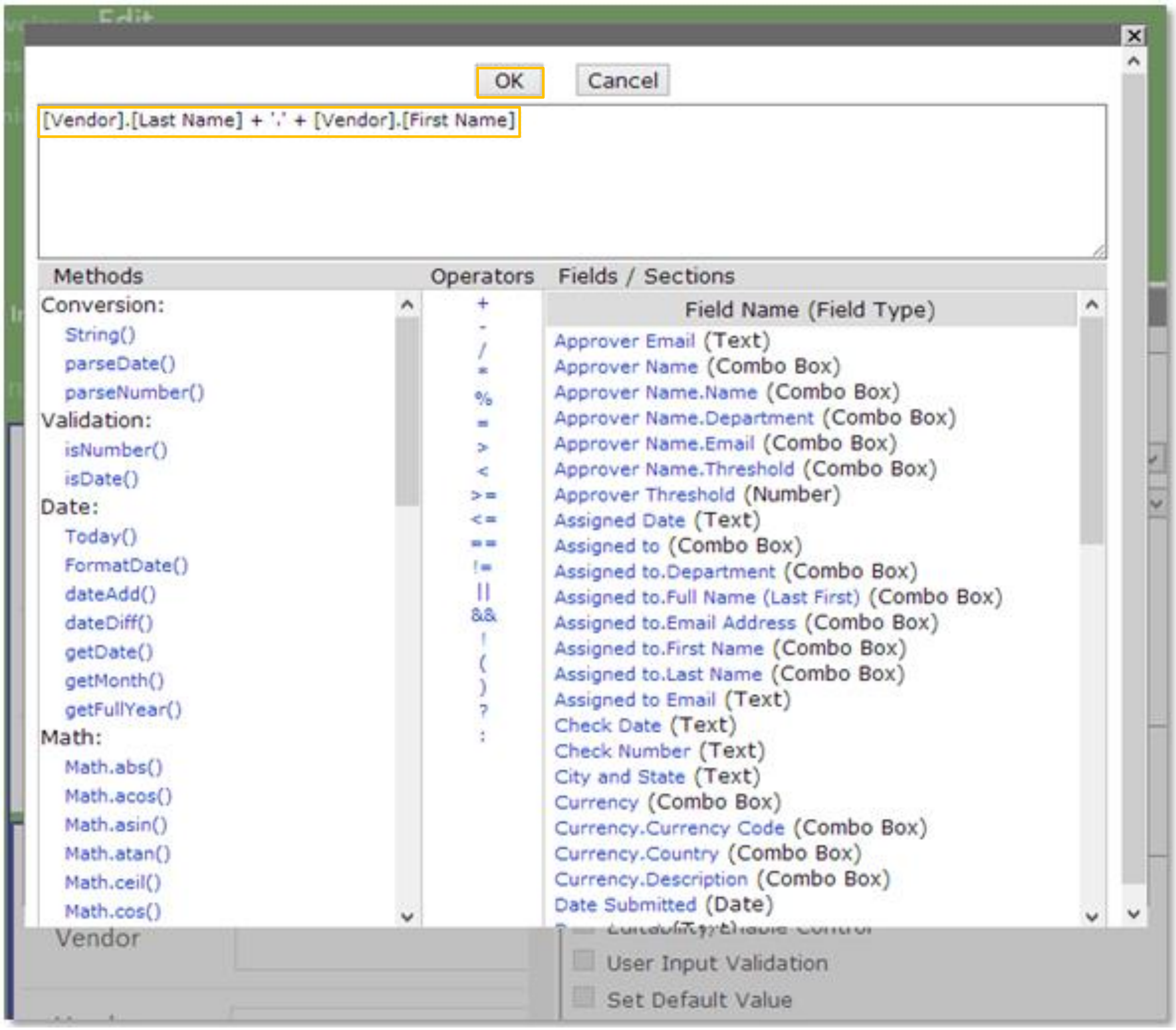
5. Click *Save*.

❖ 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.

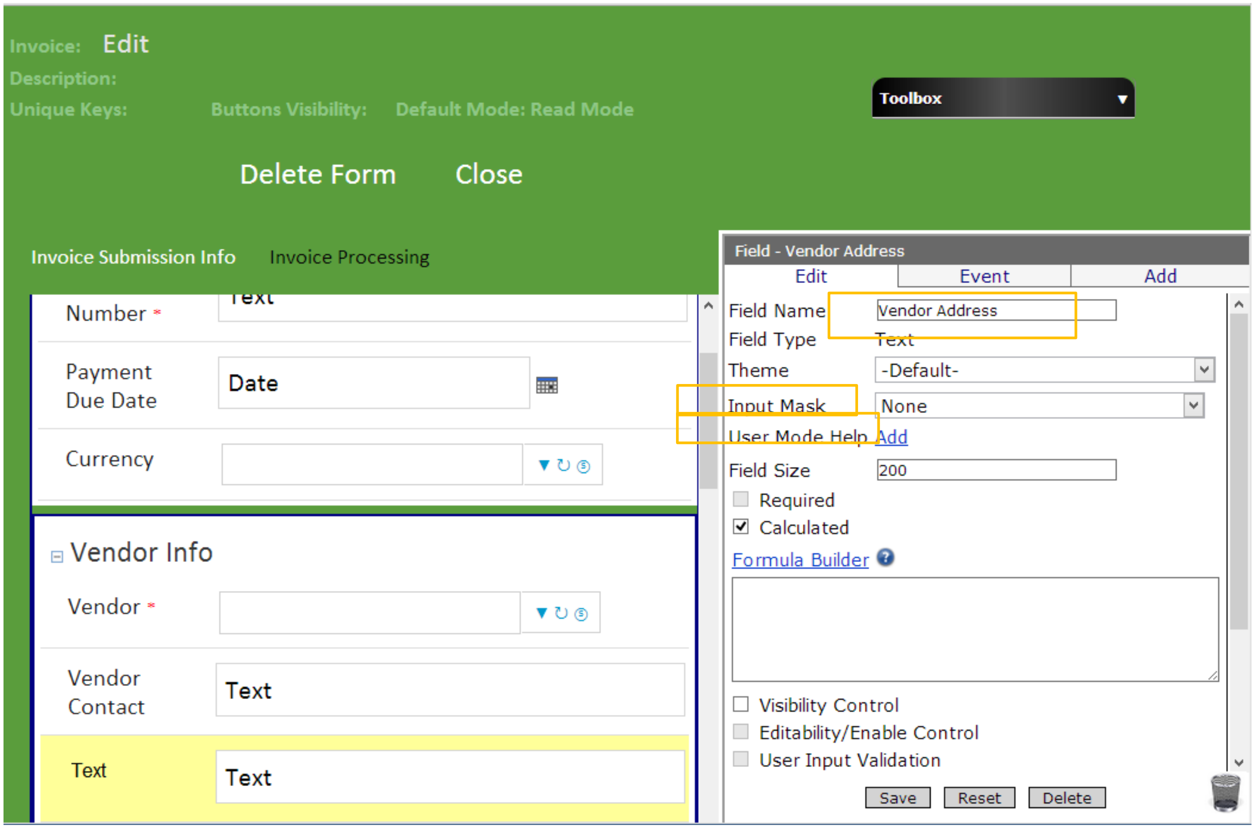
1. Drag and drop a text field into the vendor info form.
2. Name this text field Vendor Contact
3. Check *Calculated*
4. Click on Formula Builder.



5. Enter this formula:

   [Vendor].[Last Name] + ' , ' + [Vendor].[First Name]
6. Click Ok
7. Click Save.

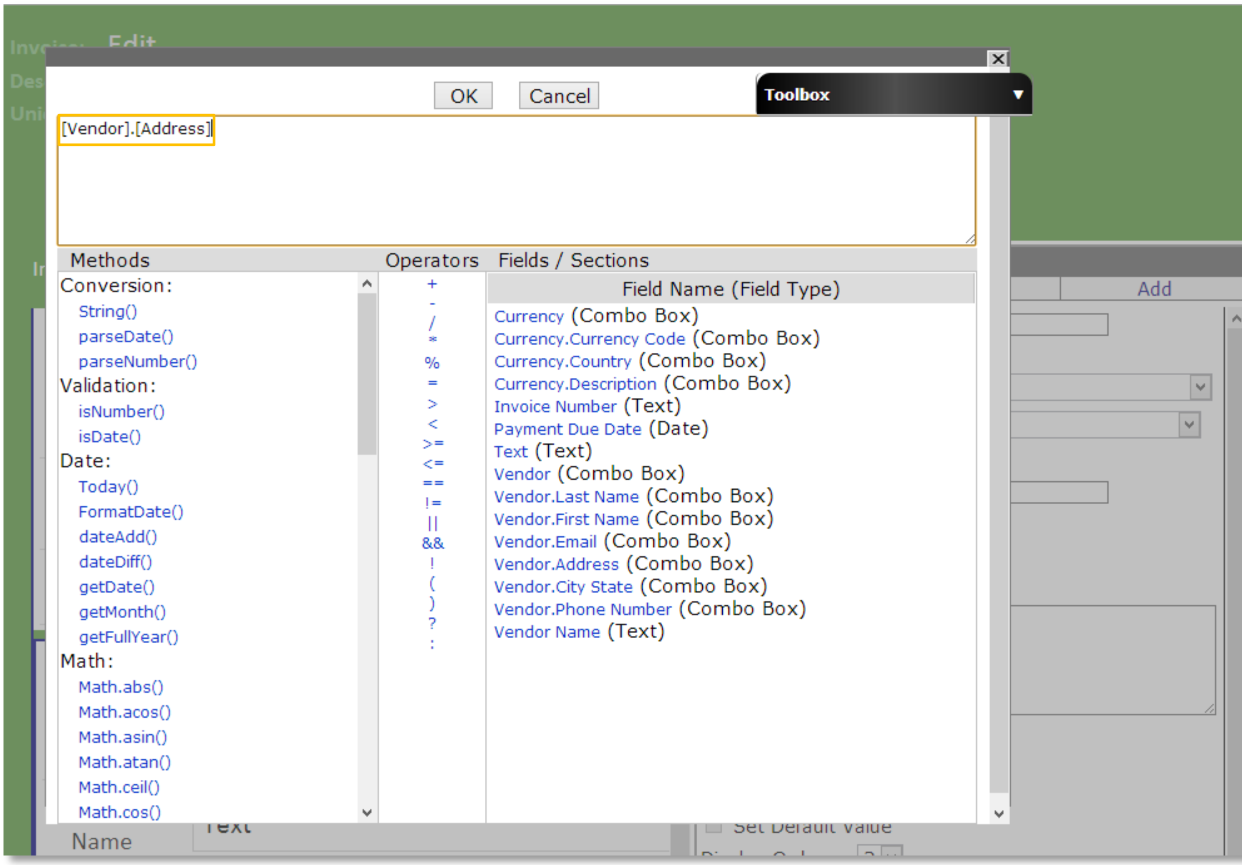
❖ Create text field Named Vendor Address



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

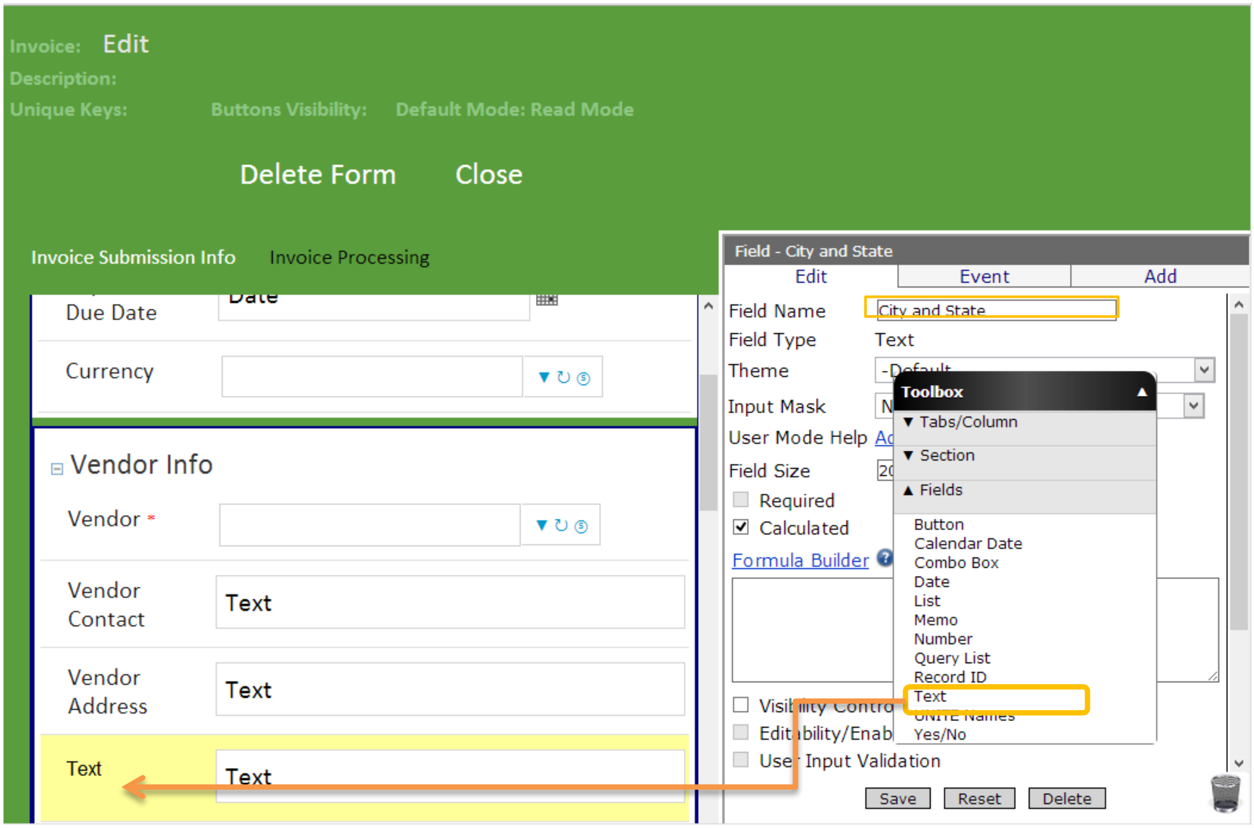
The purpose of the **formulas** we use are to create a set of instructions that your application will use to perform specific operations or to exhibit desired behaviors. Formulas are there and ready for you to use. You will only need to check the boxes next to the desired in the Properties Box, on the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



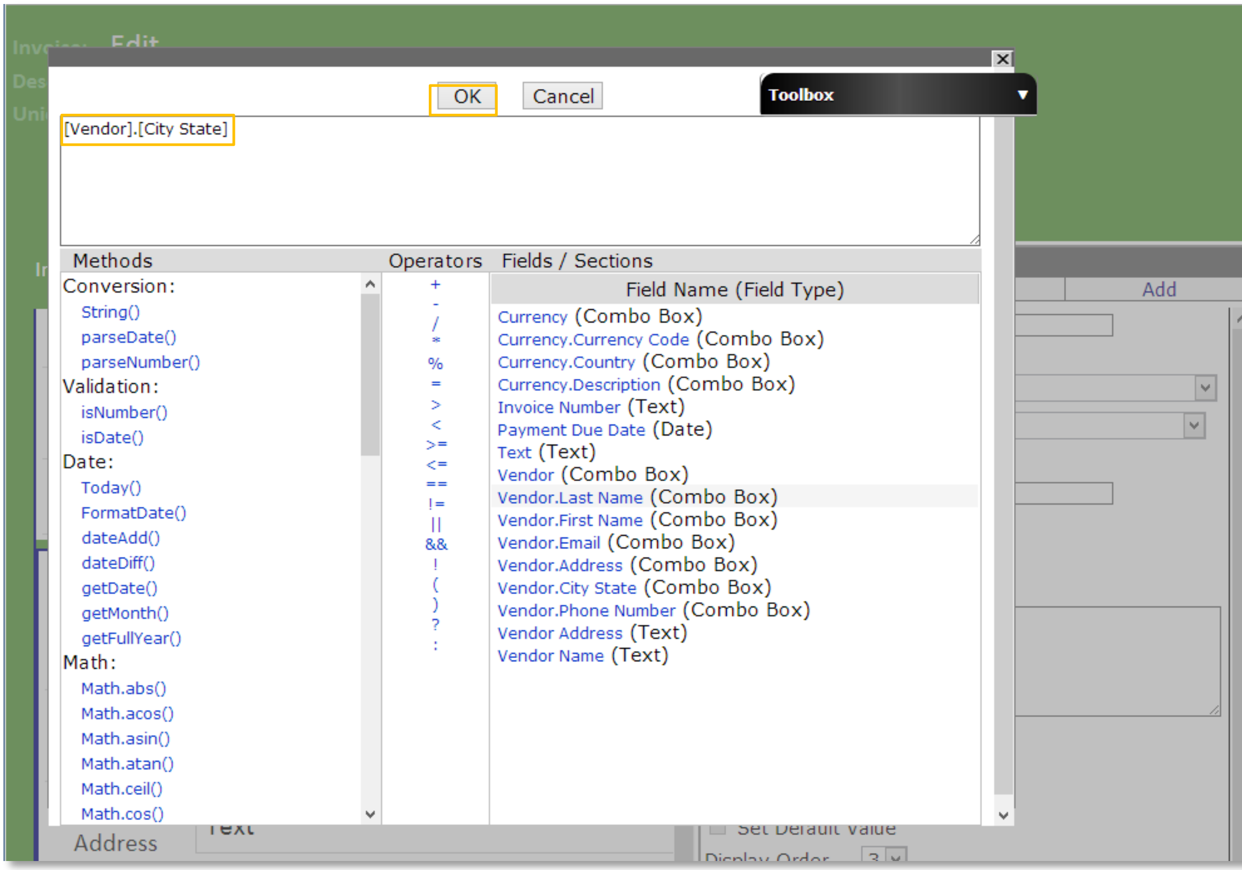
5. Enter this formula:

   [Vendor].[Address]
6. Click OK
7. Click Save.

❖ Create text field named City and State



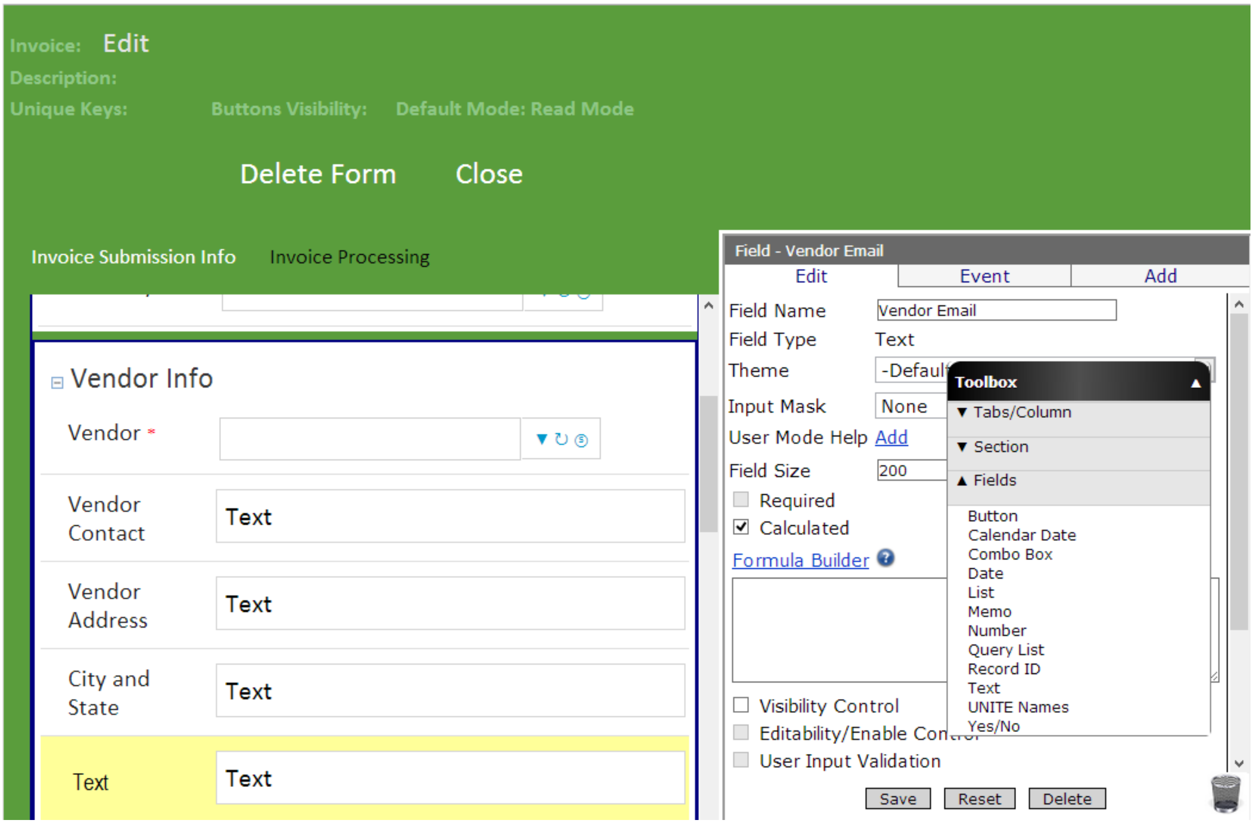
1. Drag and drop a text field into the form.
2. Name this field *City and State*
3. Check Calculated
4. Click on Formula Builder.



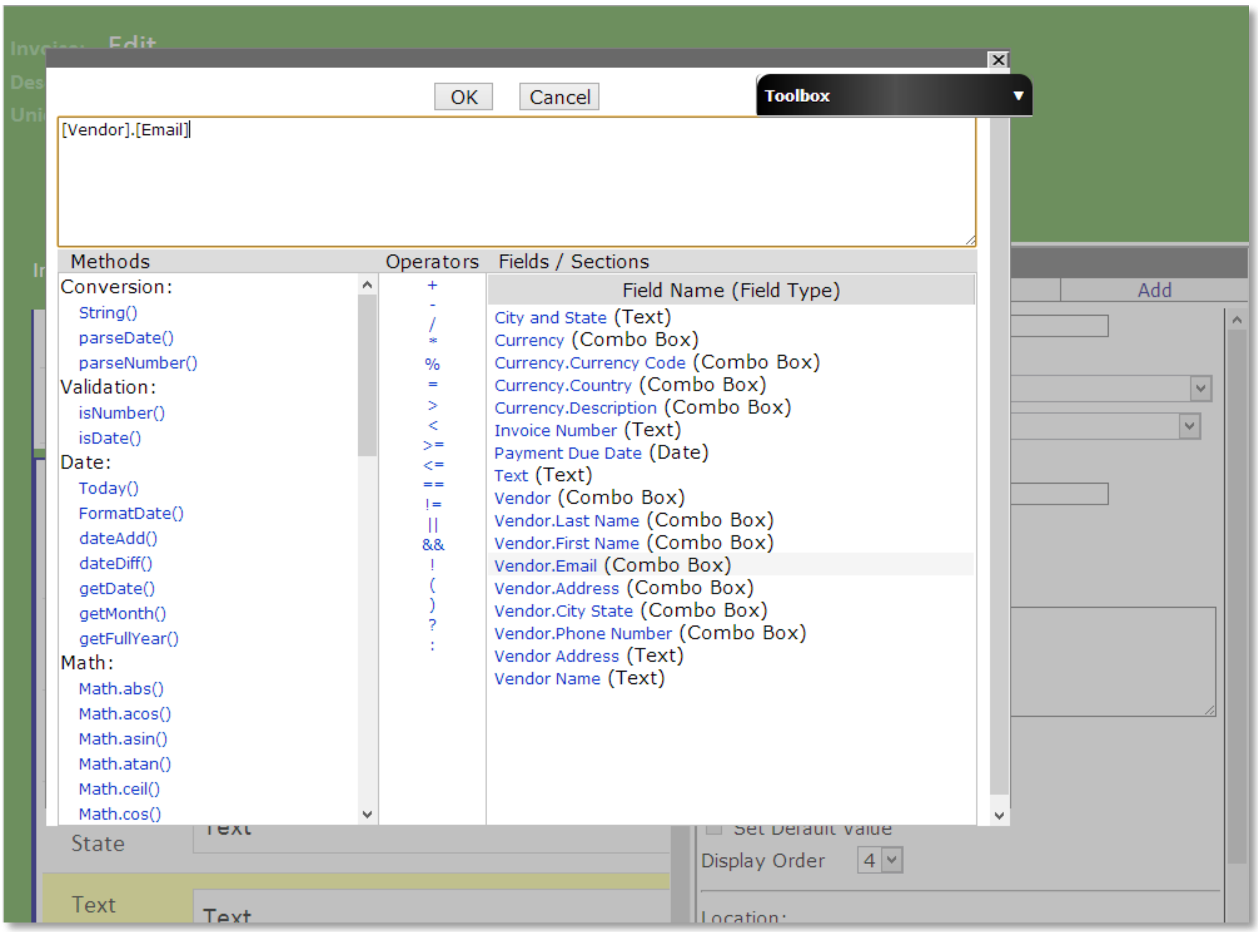
5. Enter this formula:

   [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.

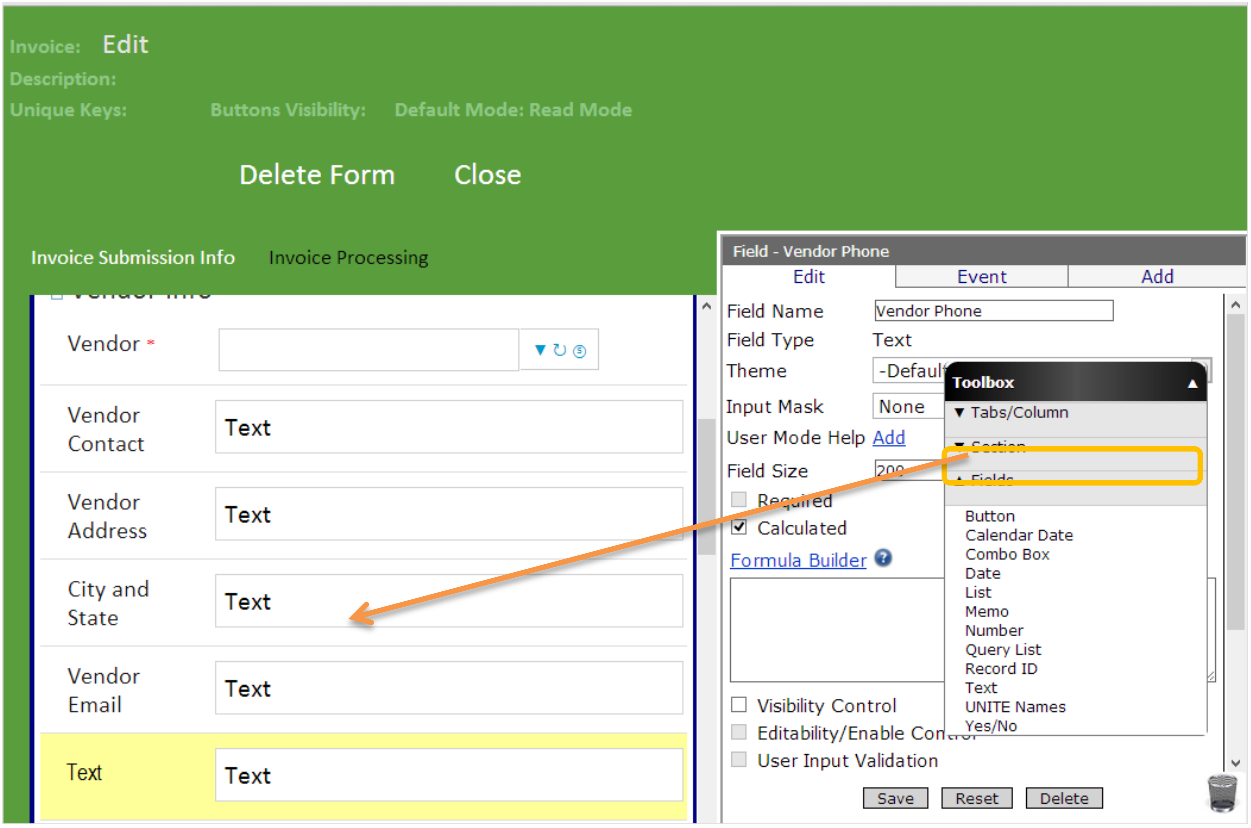


5. Enter the formula:

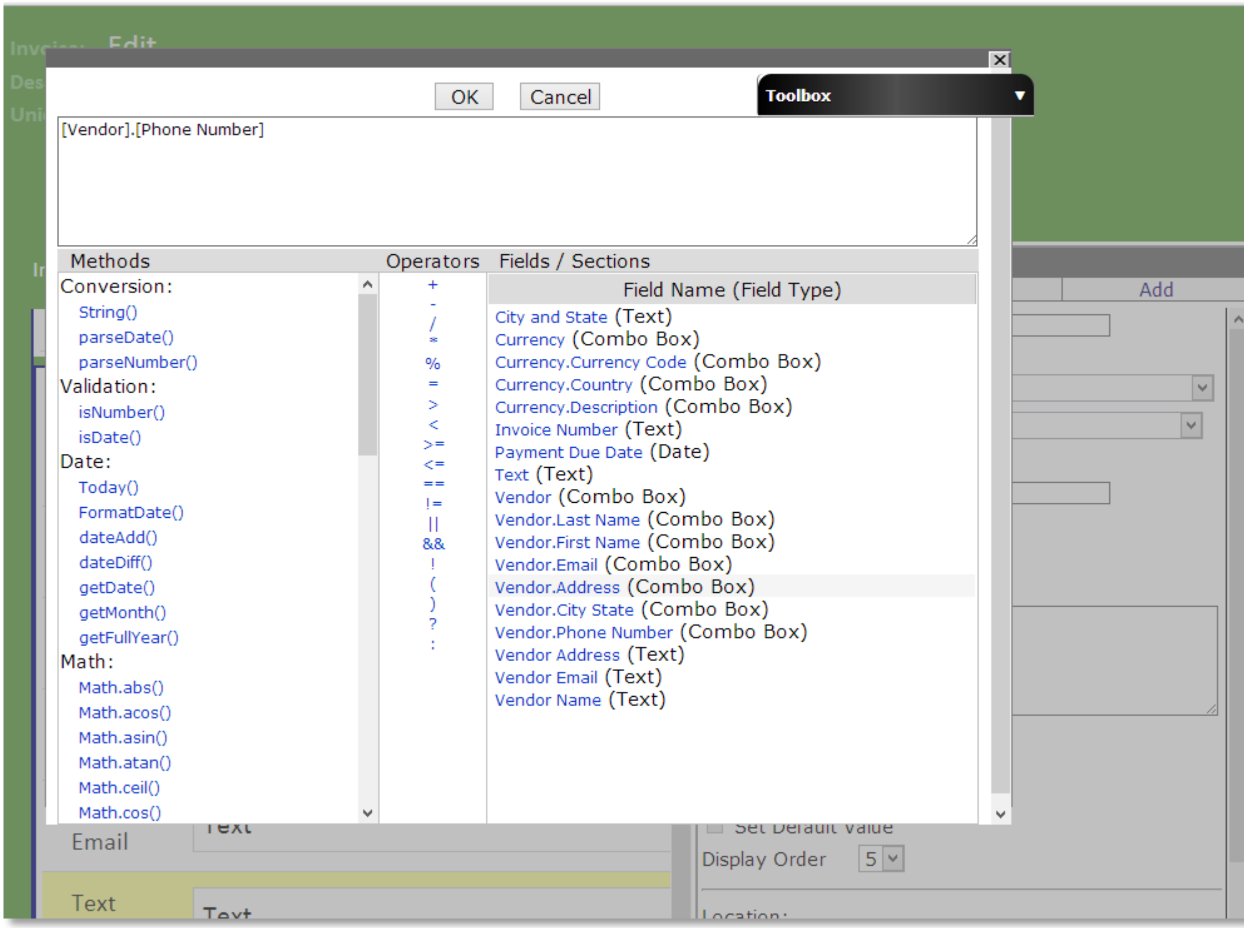
   [Vendor].[Email]

6. Click Save.

❖ Create a text field named Vendor Phone

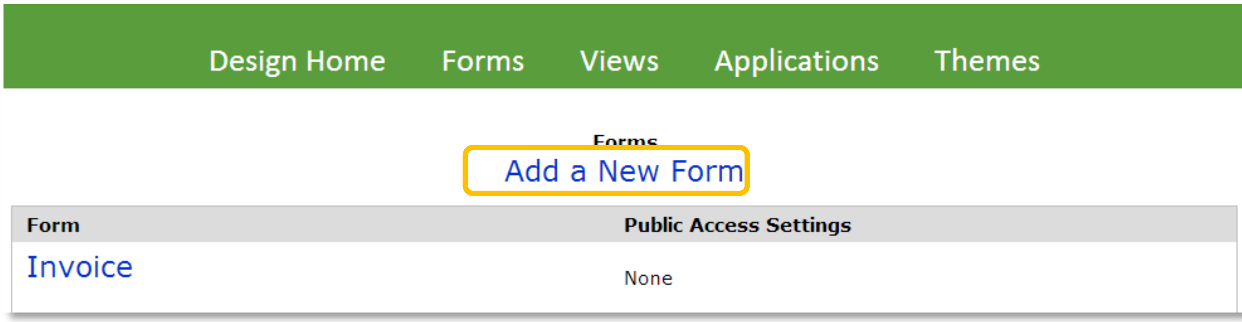


1. Drag and drop a text field into the form.
2. Name this field Vendor Phone
3. Check Calculated
4. Click on Formula Builder.

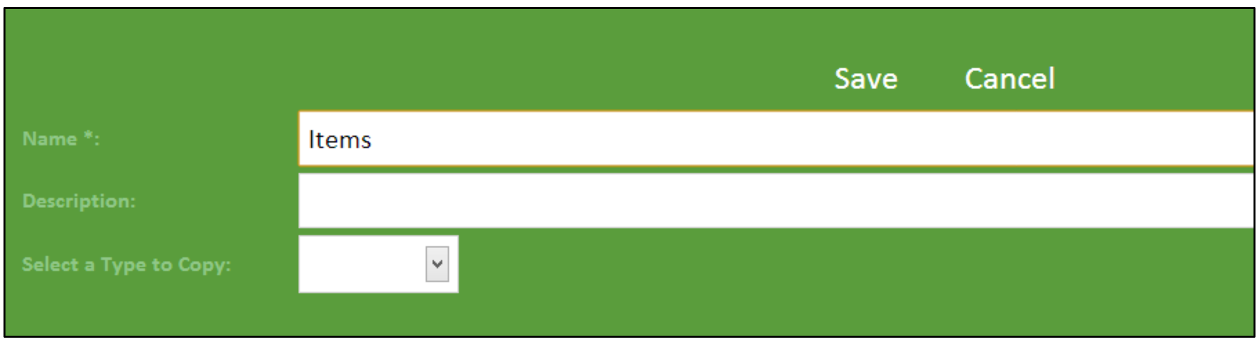


5. Enter this formula:
   [Vendor].[Phone Number]
6. Click Save.

❖ Creating Subform Named Items

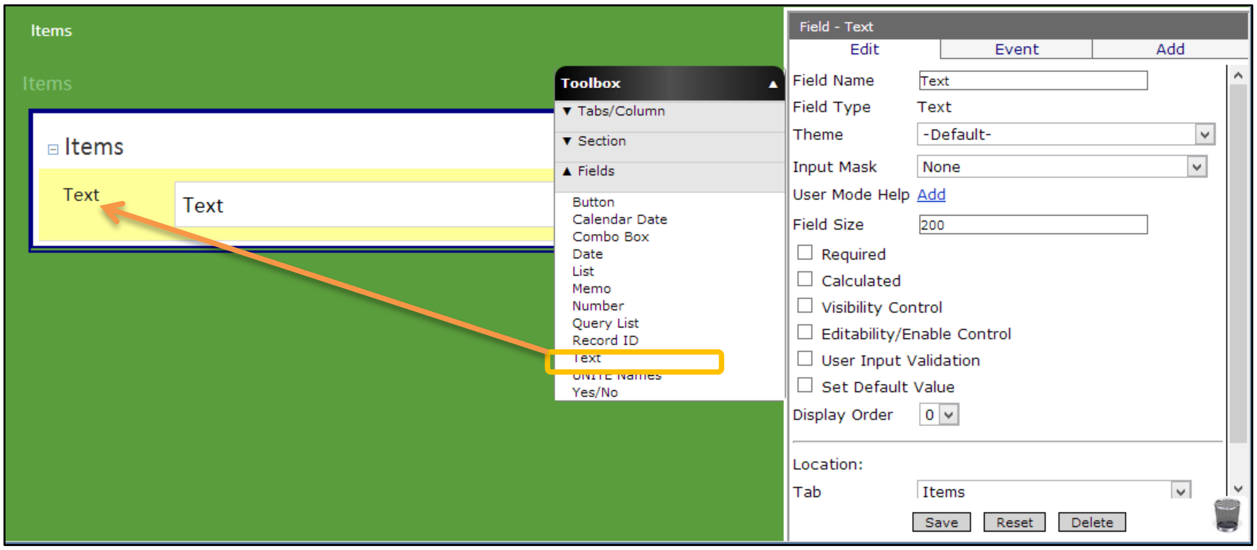


1. Click *Add a New Form*



2. Name this new Form Items

❖ *Create text Field Called Item Description*

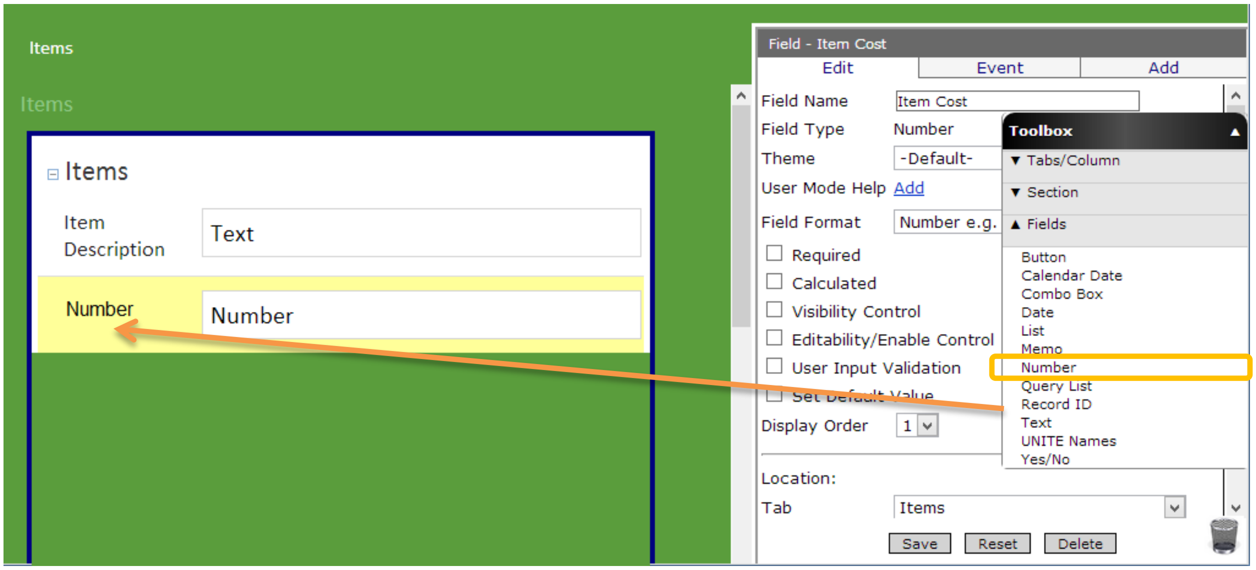


1. Drag and drop a Text Field into the form.

2. In the Properties Box click on field name and type *Item Description*

3. Click *Save.*

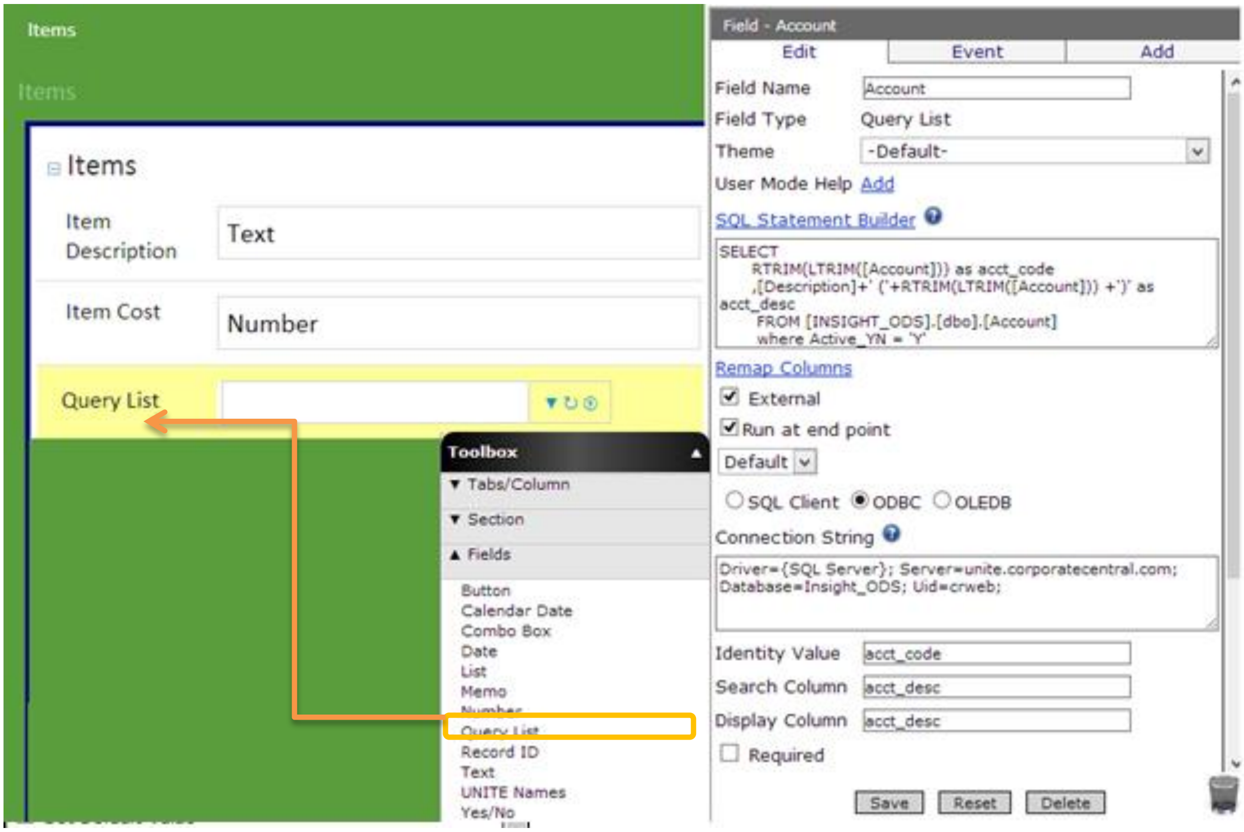
❖ Create Number field named Item Cost-



✓ 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



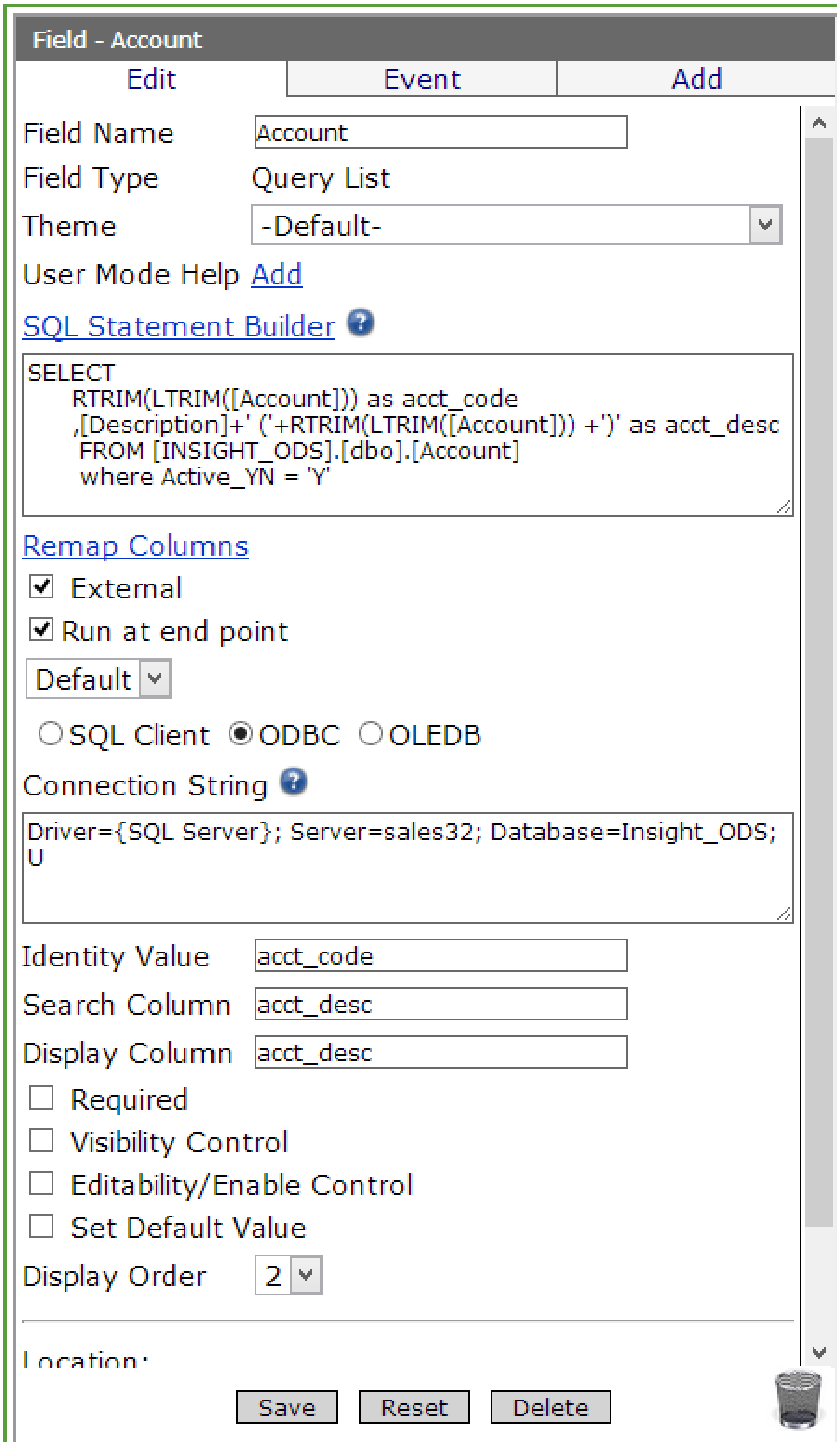
✓ Drag and drop a Query List Field into the form

❖ Name the Query List

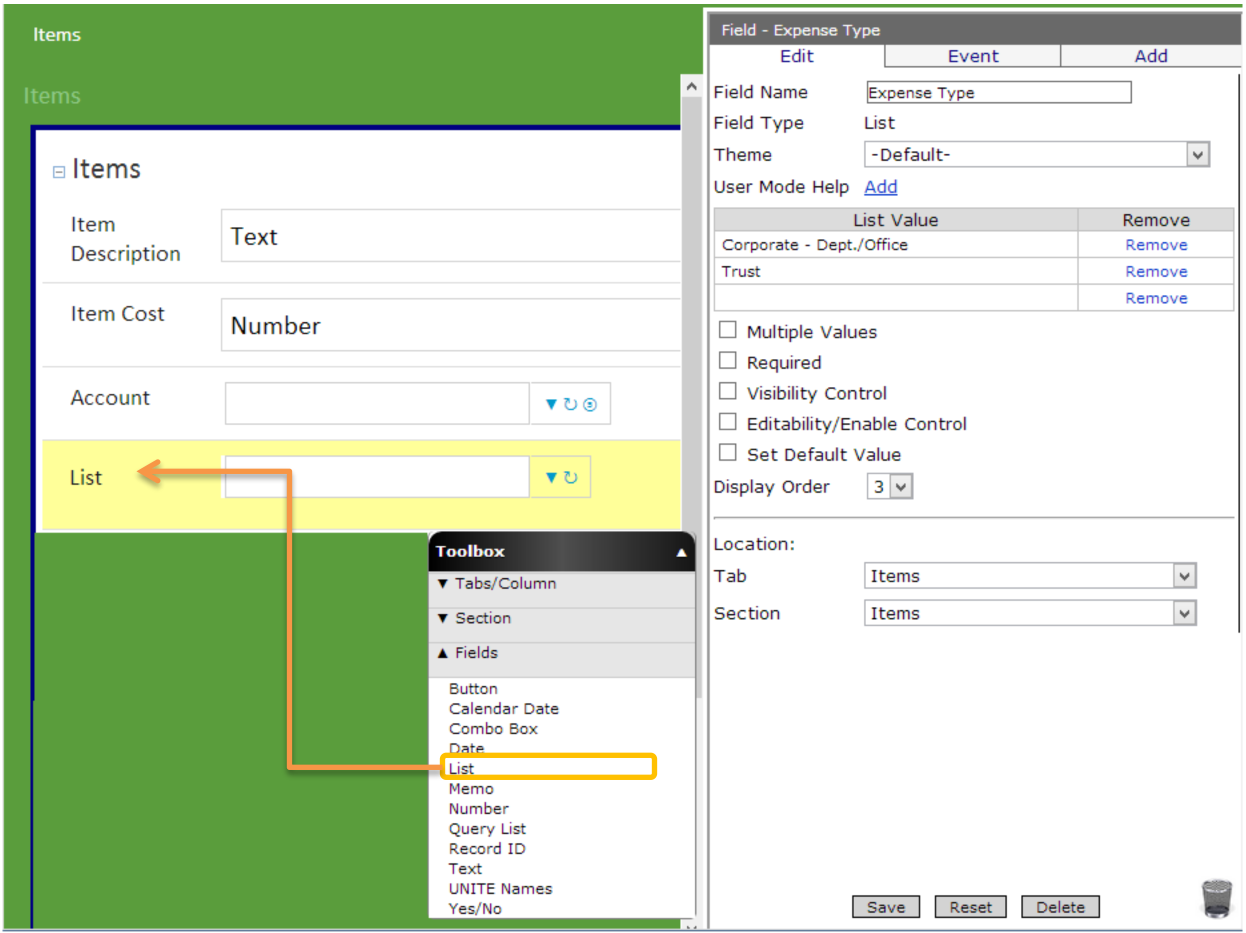
1. Name this field *Account.*
2. Enter the SQL Query that retrieves the names of accounts from our accounting system. In your case this query will be different. Consult your Accounting software manual.
3. Enter the Connection string necessary to connect to the database server.
4. Importantly, we will 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 competed 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.

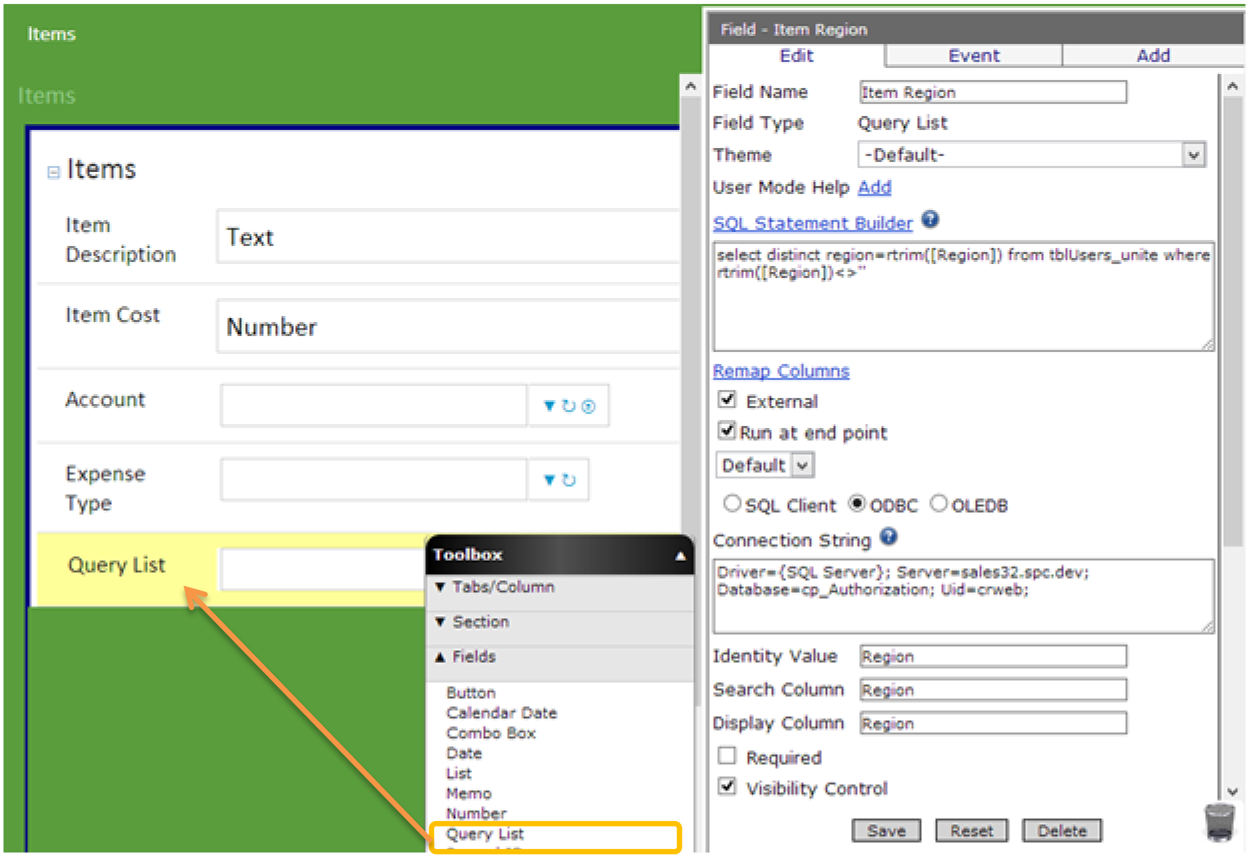

Field - Account
Edit
Event
Add
Field Name
Account
Field Type
Query List
Theme
-Default-
User Mode Help Add
SQL Statement Builder
SELECT
RTRIM(LTRIM([Account])) as acct_code
,[Description]+' ('+RTRIM(LTRIM([Account])) +')' as acct_desc
FROM [INSIGHT_ODS].[dbo].[Account]
where Active_YN = 'Y'
Remap Columns
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
Save
Reset
Delete

Create List Field Named Expense Type



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.



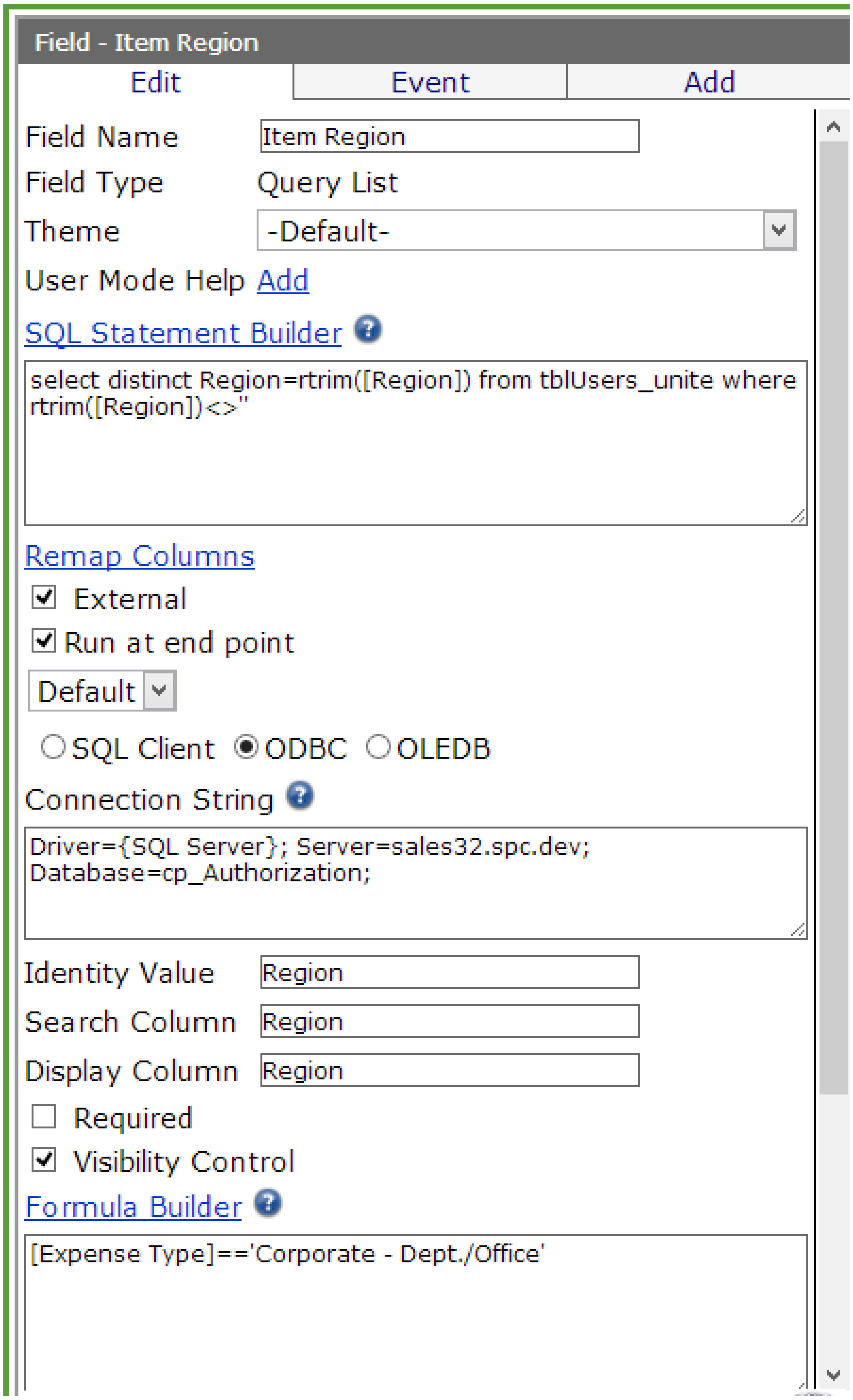
✓ Drag and drop a Query List Field into the form

❖ Name the Query List as shown on the screenshot on the next page

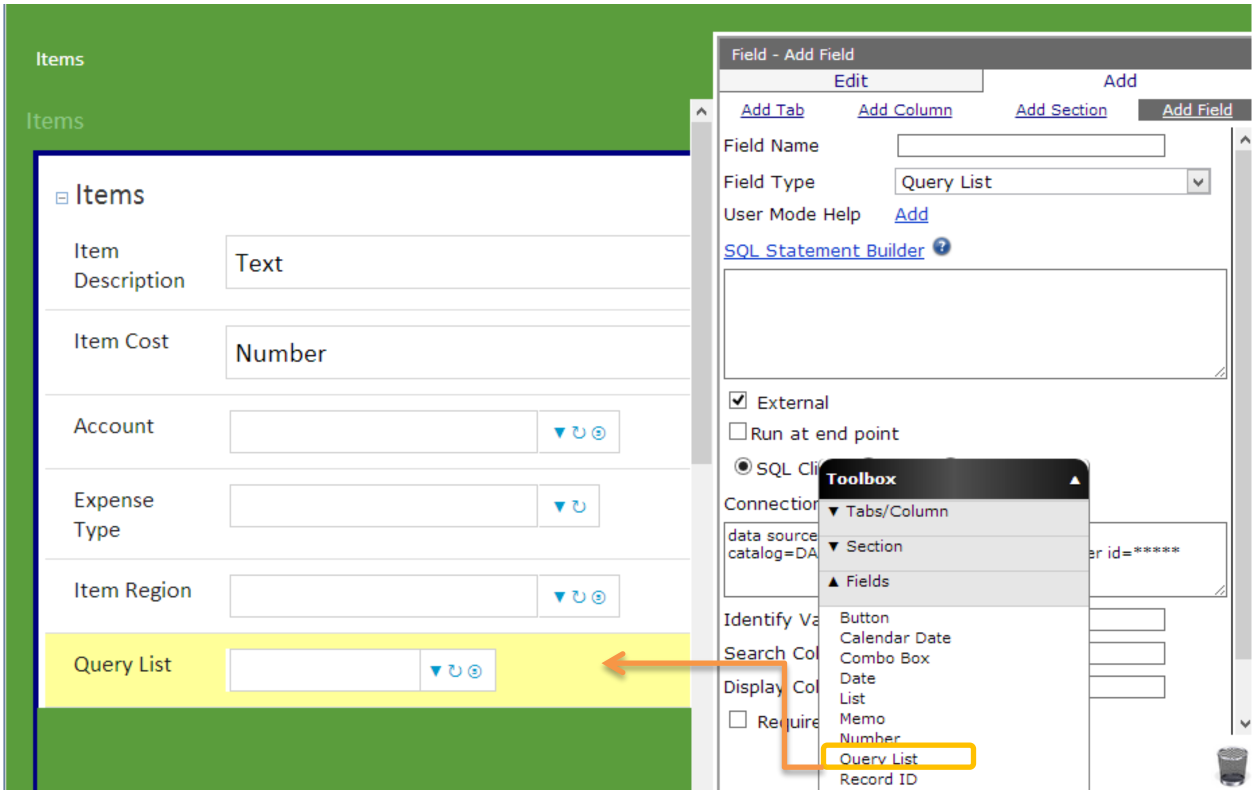
1. Name this field as *Item Region*
2. Enter the SQL Query that retrieves the names of Regions from our accounting system. In your case this query will be different. Consult your Accounting software manual.
3. Enter the Connection string necessary to connect to the database server.
4. Importantly, we 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 competed 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
Item Region
Field Type
Query List
Theme
-Default-
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
Default
SQL Client
ODBC
OLEDB
Connection String
Driver={SQL Server}; Server=sales32.spc.dev; Database=cp_Authorization;
Identity Value
Region
Search Column
Region
Display Column
Region
Required
Visibility Control
Formula Builder
[Expense Type]=='Corporate - Dept./Office'

Create Query List Named Item Department.

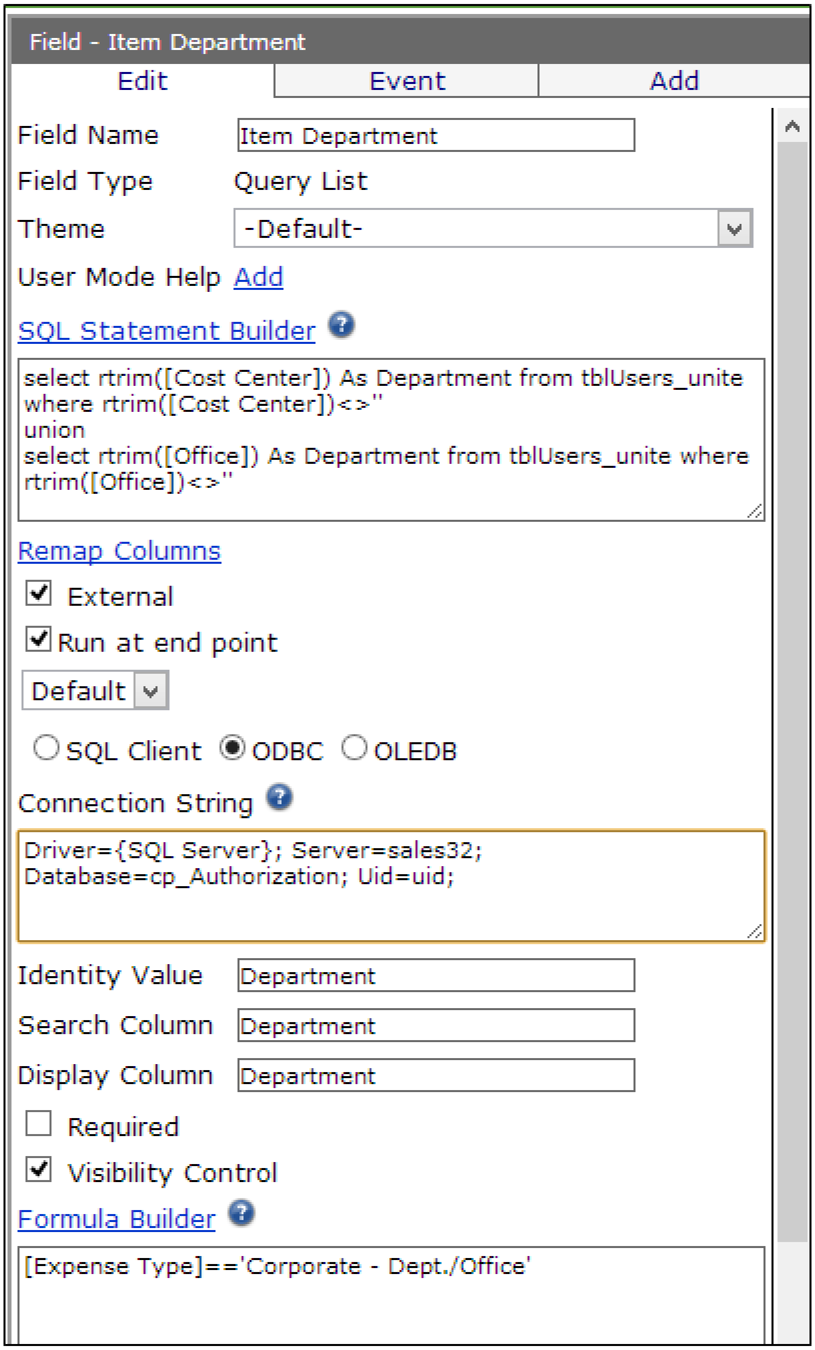


✓ Drag and Drop a query list field form the toolbox beneath the Account field.

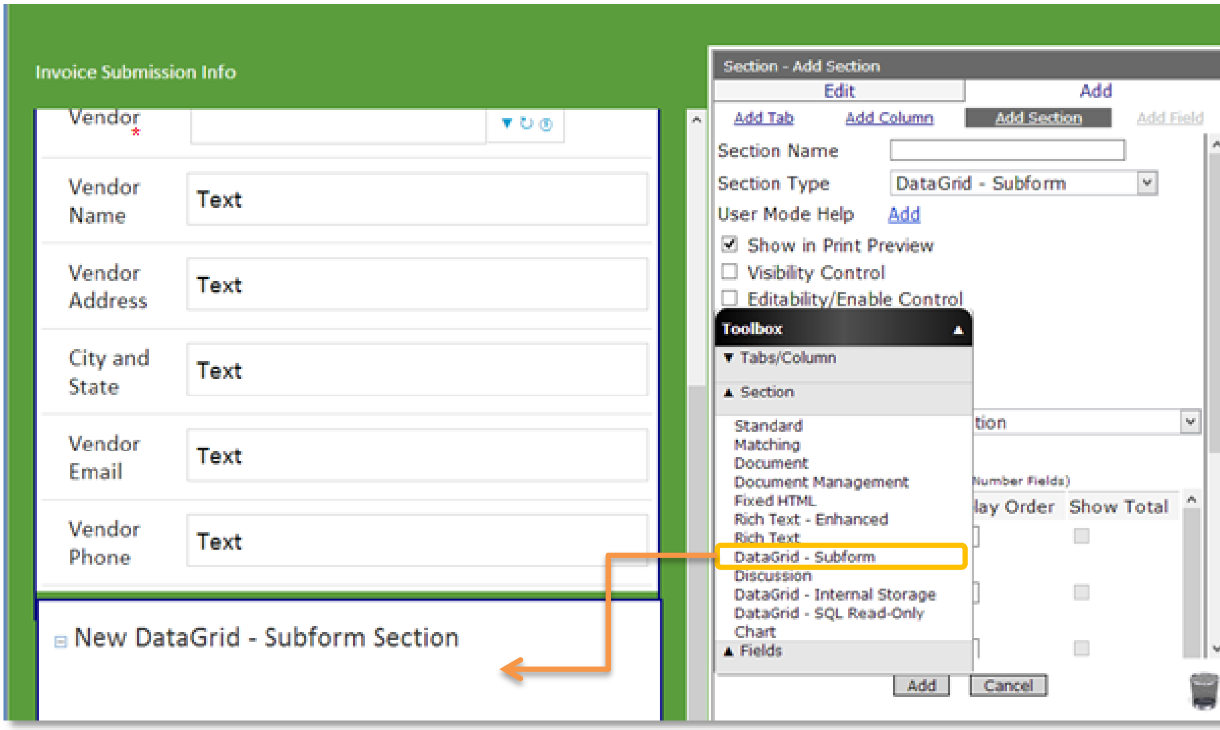
❖ Name the Query list as shown on the screenshot of the next page.

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 competed 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

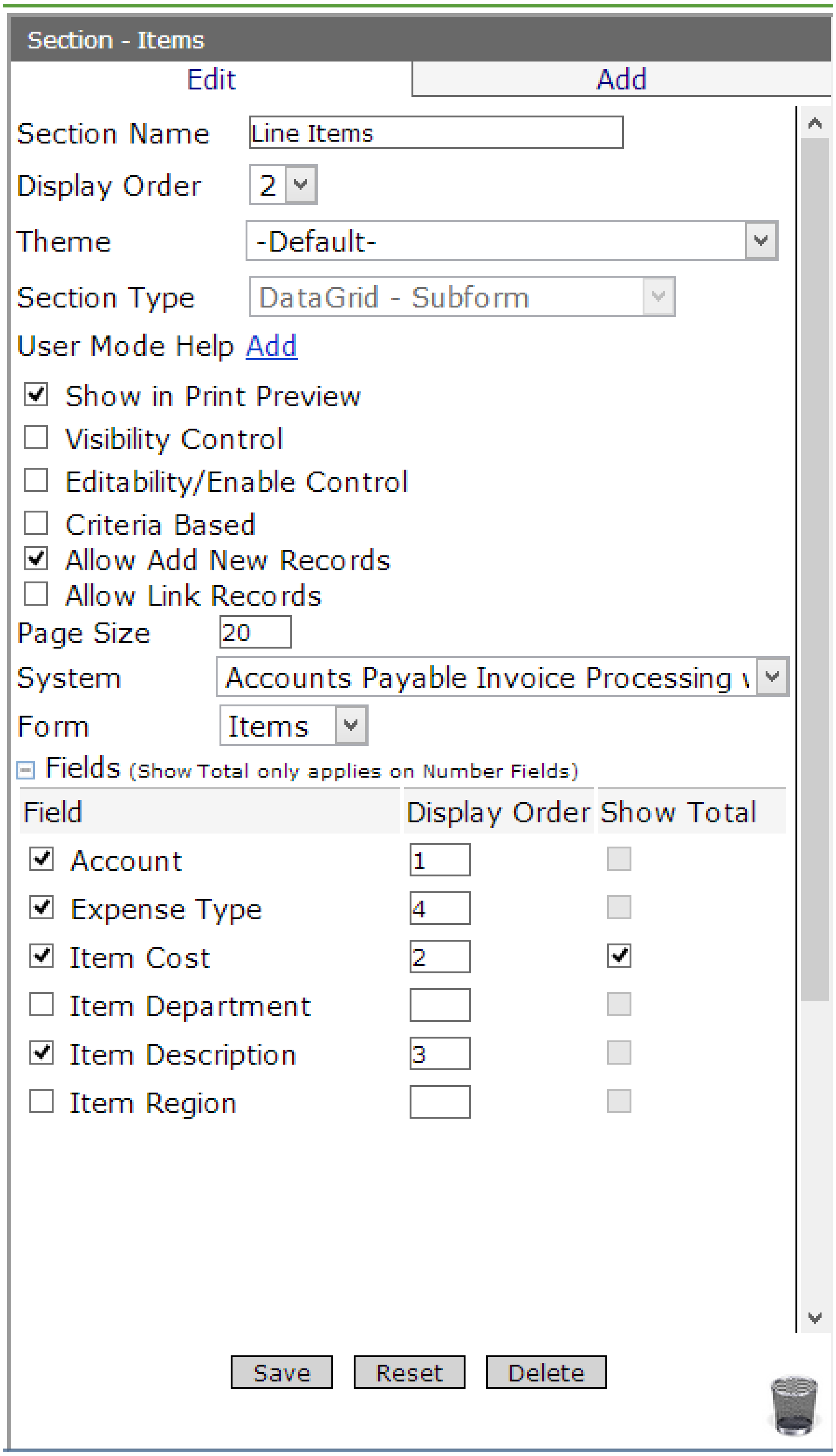

Field - Item Department
Edit
Event
Add
Field Name
Item Department
Field Type
Query List
Theme
-Default-
User Mode Help
Add
SQL Statement Builder
select rtrim([Cost Center]) As Department from tblUsers_unite where rtrim([Cost Center])<>''
union
select rtrim([Office]) As Department from tblUsers_unite where rtrim([Office])<>''
Remap Columns
External
Run at end point
Default
SQL Client
ODBC
OLEDB
Connection String
Driver={SQL Server}; Server=sales32; Database=cp_Authorization; Uid=uid;
Identity Value
Department
Search Column
Department
Display Column
Department
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.



❖ 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.

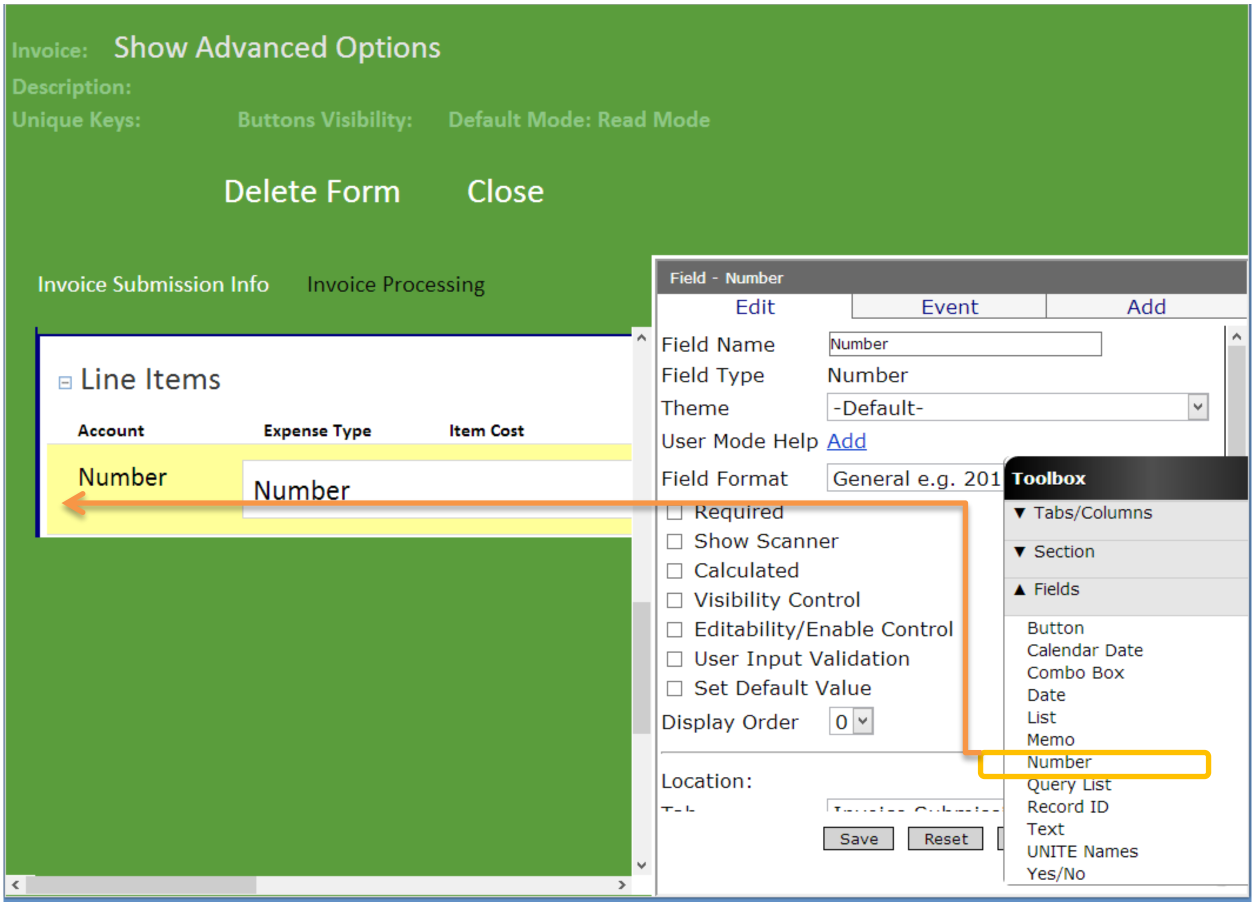
4. Check “Account”, “Expense Type”, “Item Cost”, and “Item Description,

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

6. Check Show Total next to Item Cost

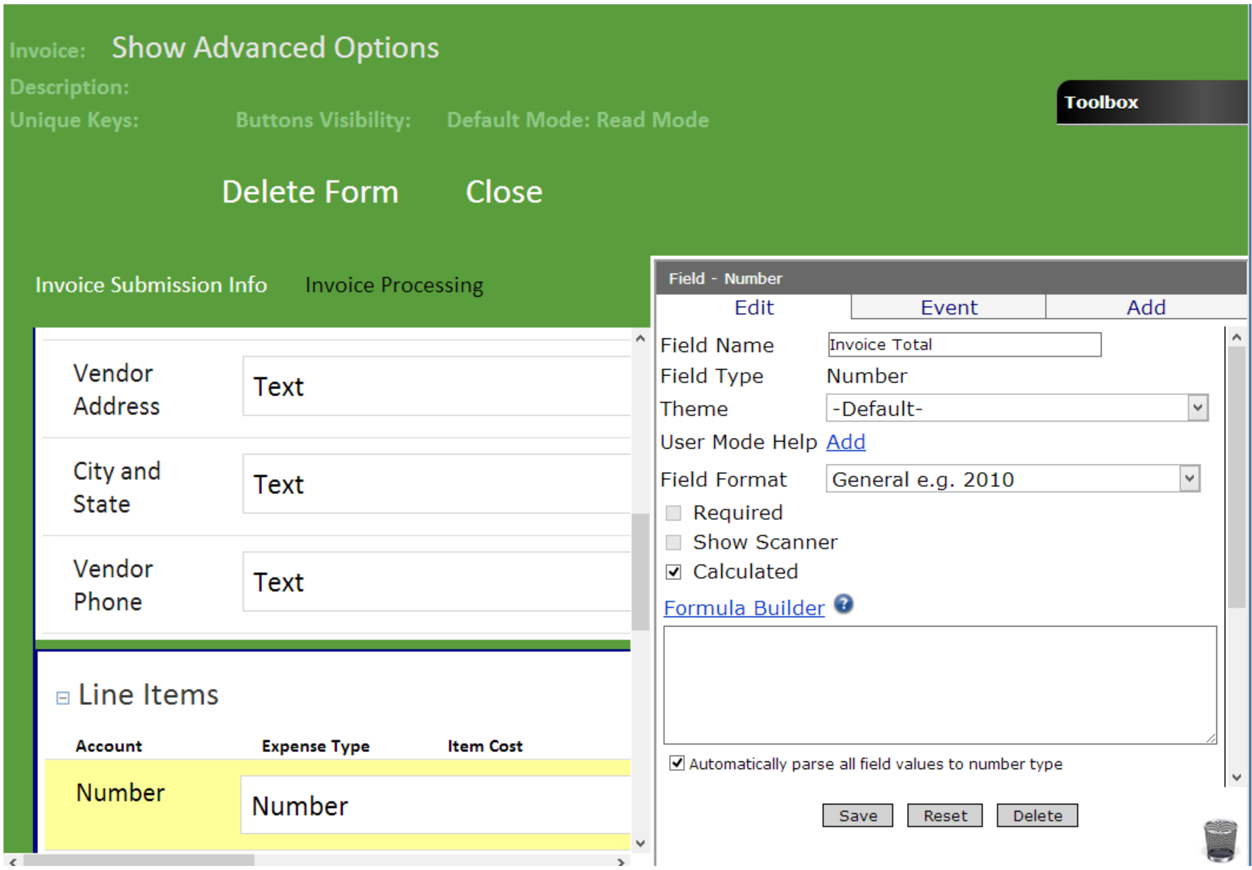
7. Click Add

❖ Create a Number field named Invoice Total

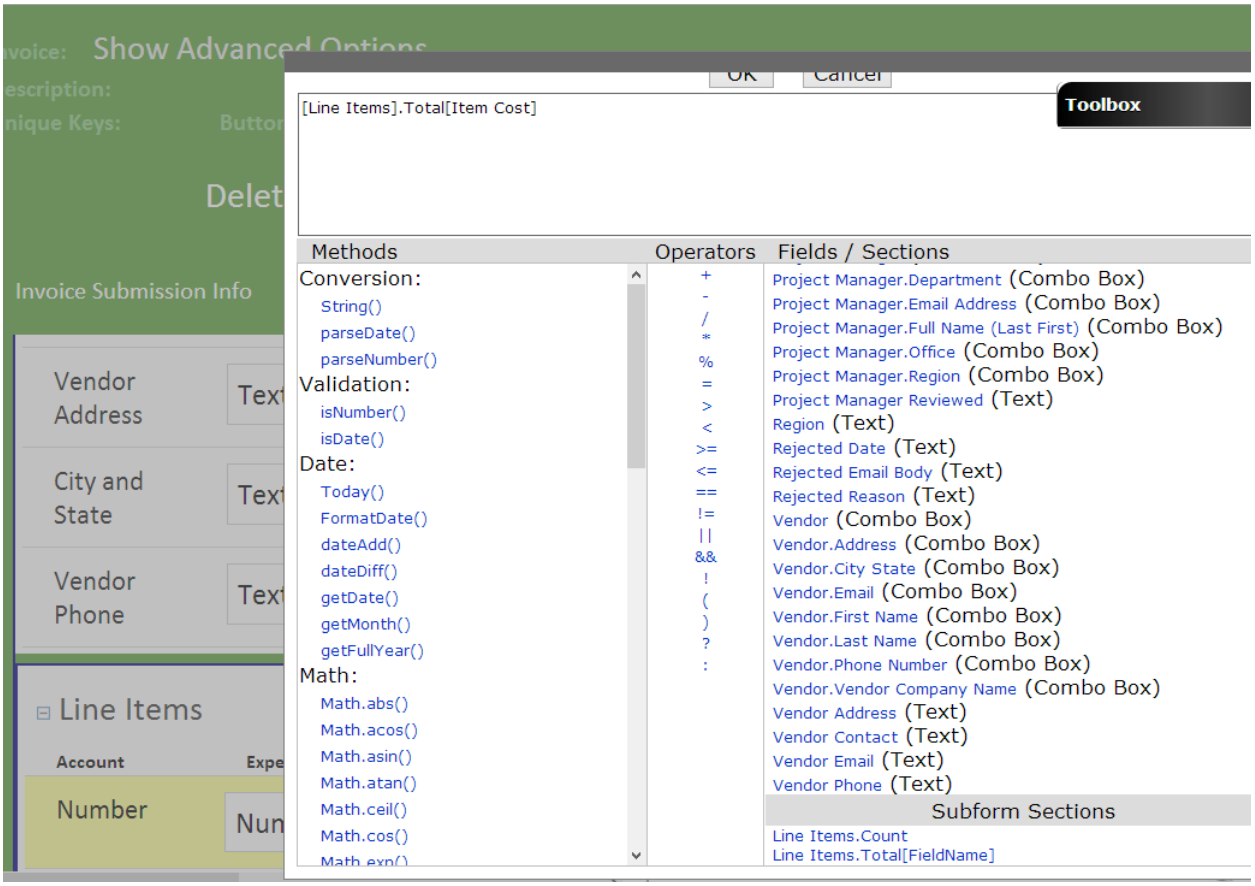


✓ Drag and drop a Number field from the Toolbox into the Line Items subform

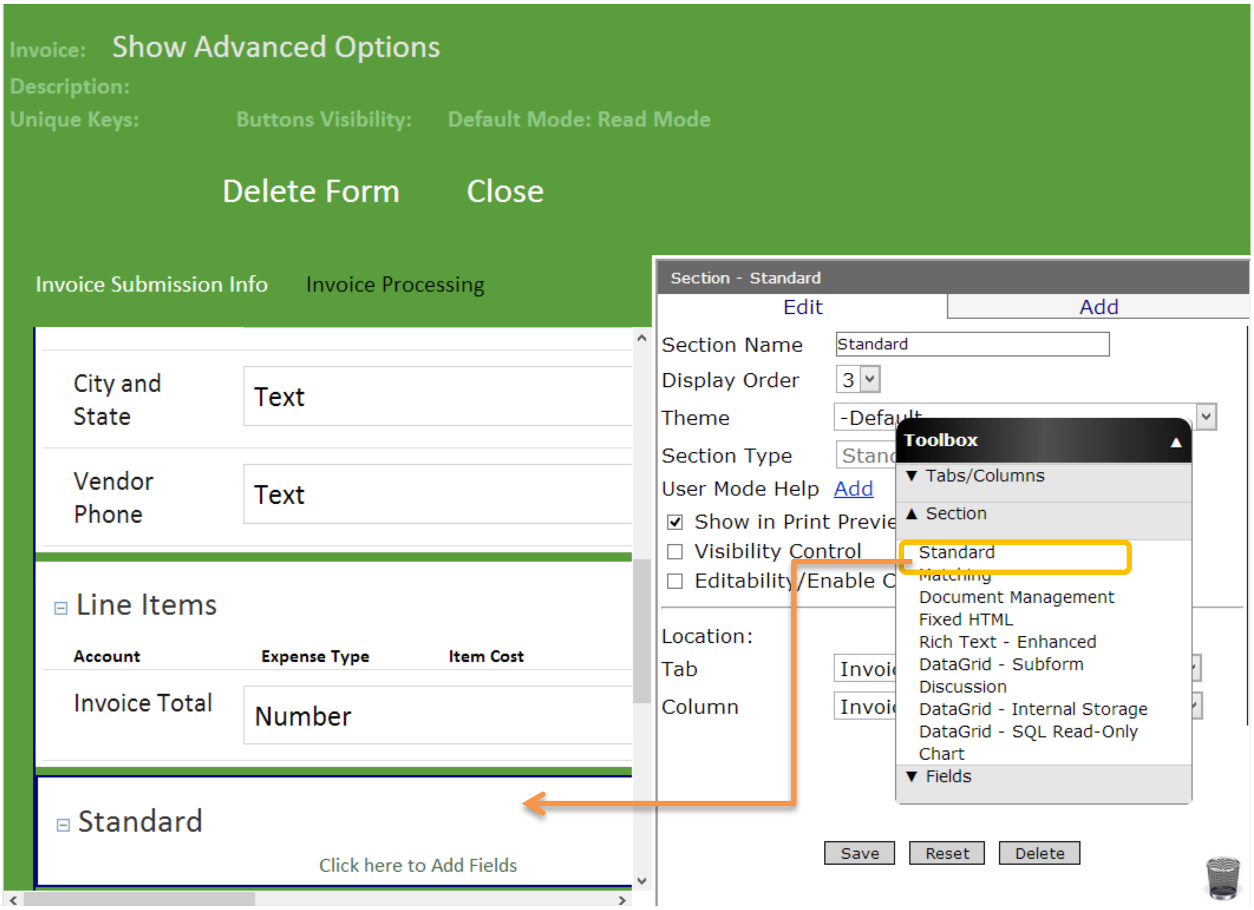
❖ Name the Number field



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



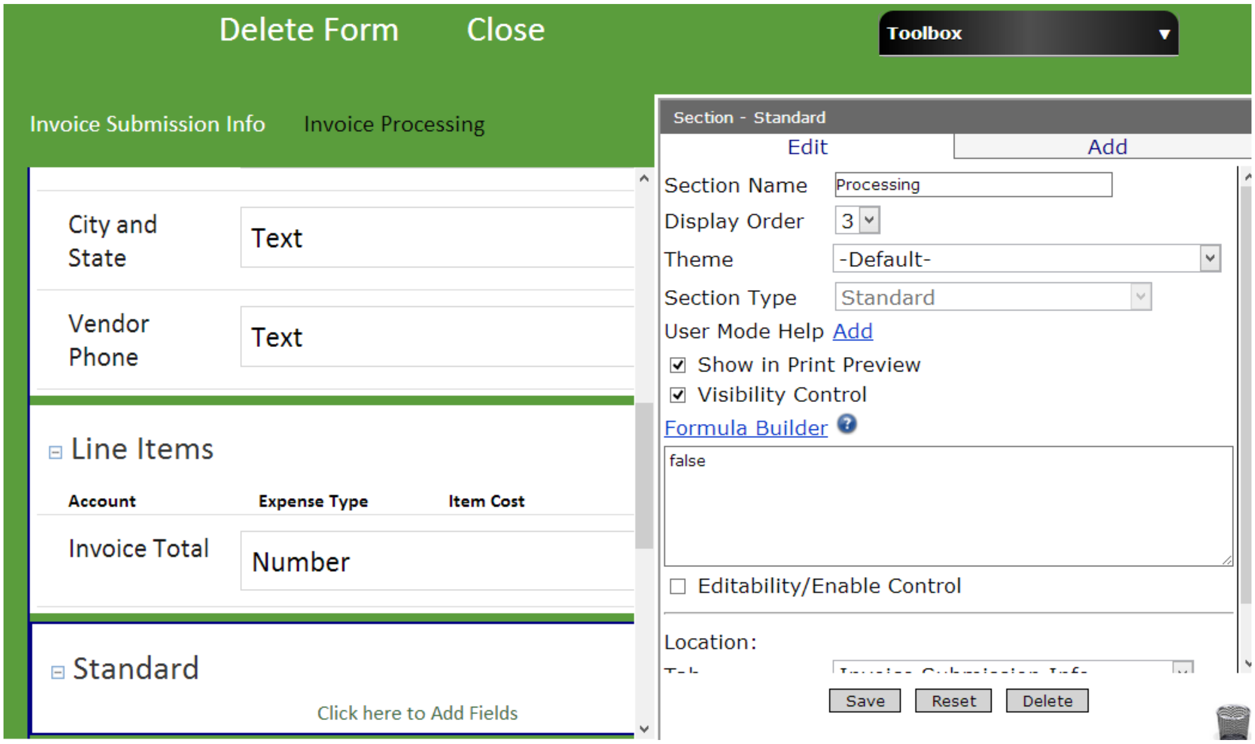
4. Click Formula Builder and enter the following formula:
   [Line Items].Total[Item Cost]
5. Click Save



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.

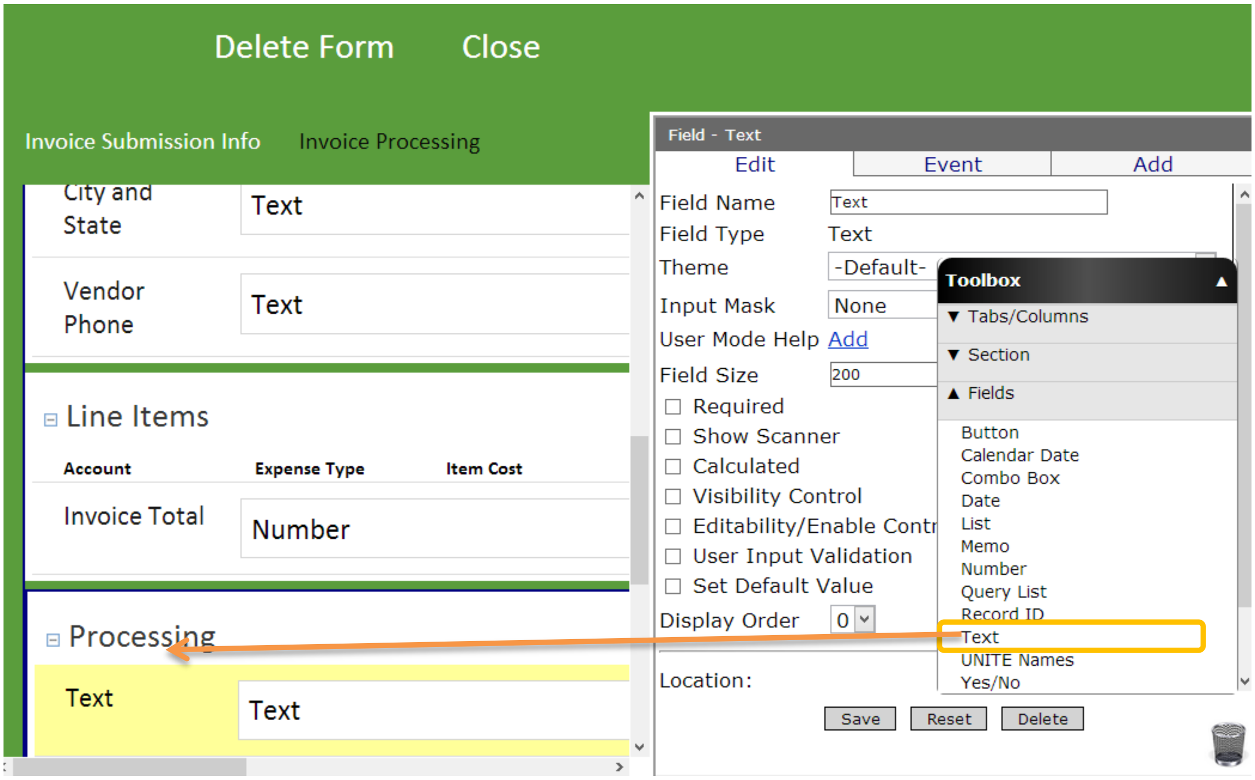
❖ Create new Section Called Processing



✓ Drag and drop a Standard Section into our form.

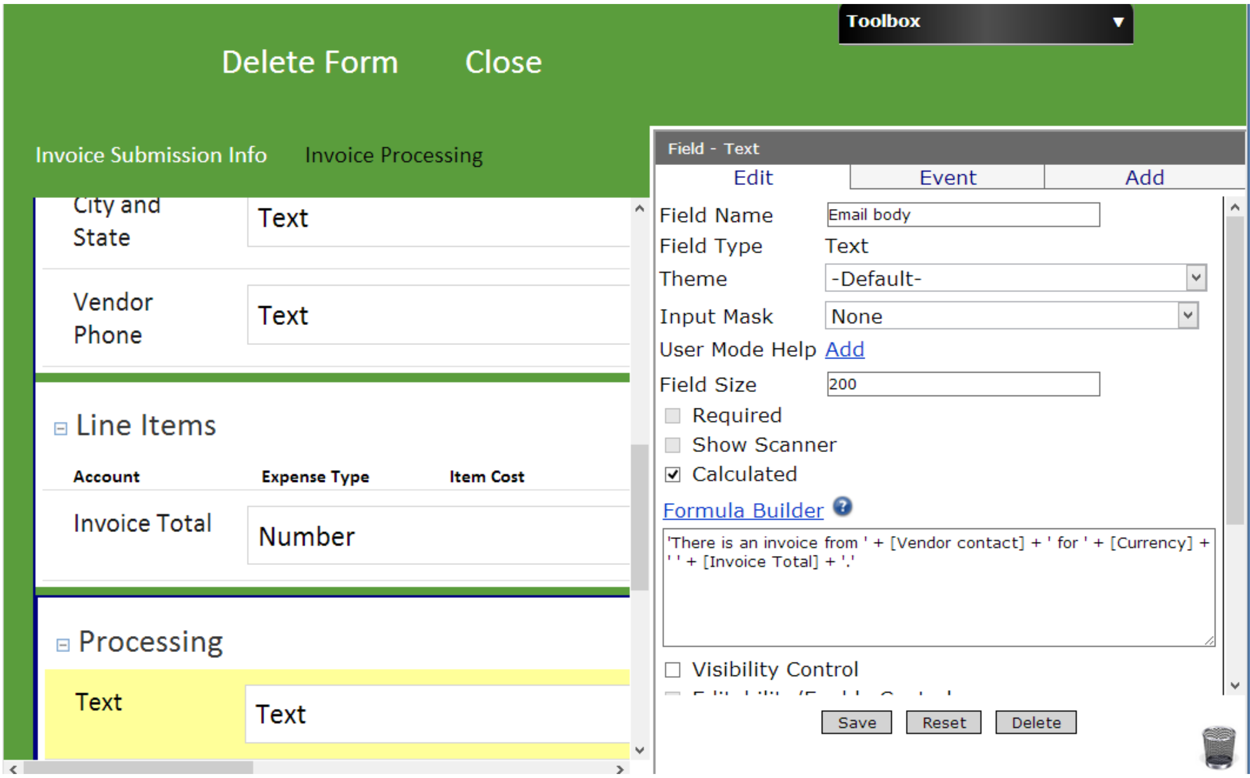
1. Name this section “Processing
2. Check Visibility Control. Make sure the box underneath it says, false

❖ Create Text Field Named **Email Body**



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

❖ Name the text field



Email Body

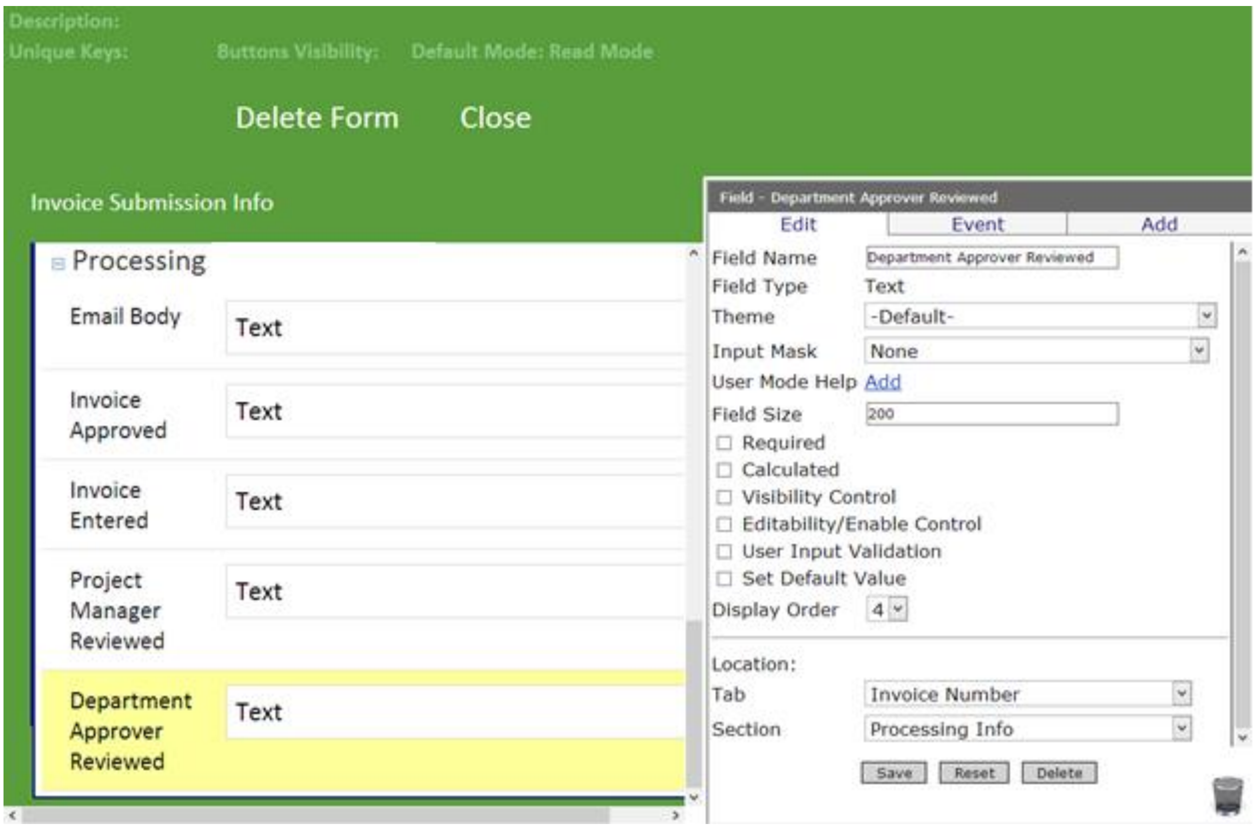
During the course of invoice processing we will email people regarding details about the invoice. We will use a text field to set up this email automatically without users having to worry about constructing each email.

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



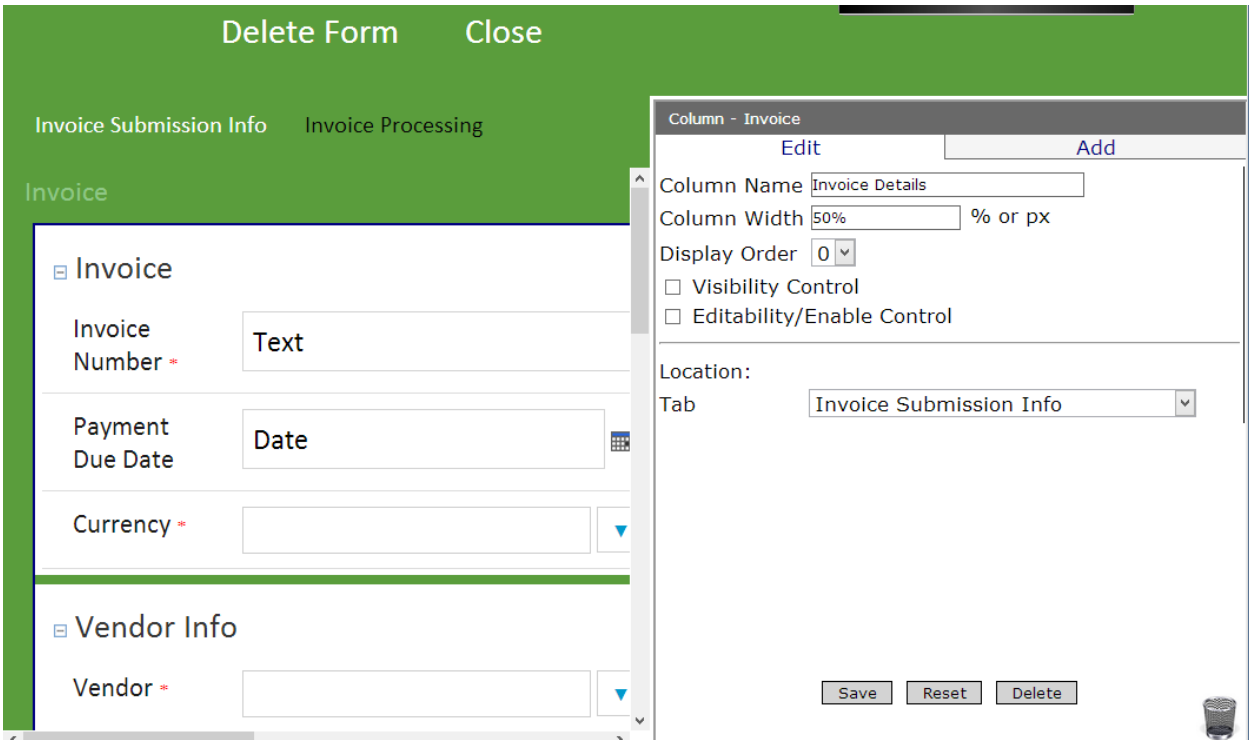
Flags

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.

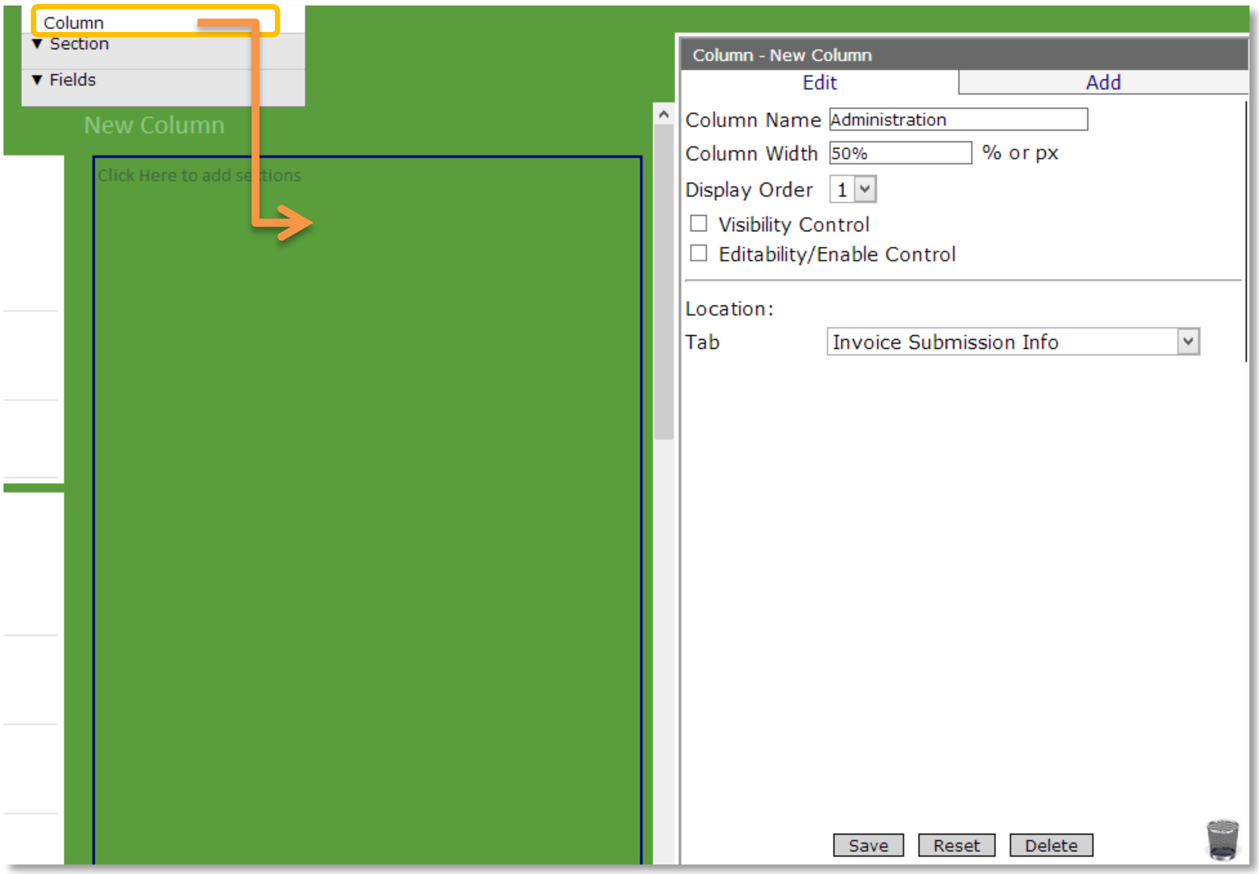
8. Name this field "Department Approver Reviewed" and Click Save.

❖ Rename the Column Invoice to Invoice Details



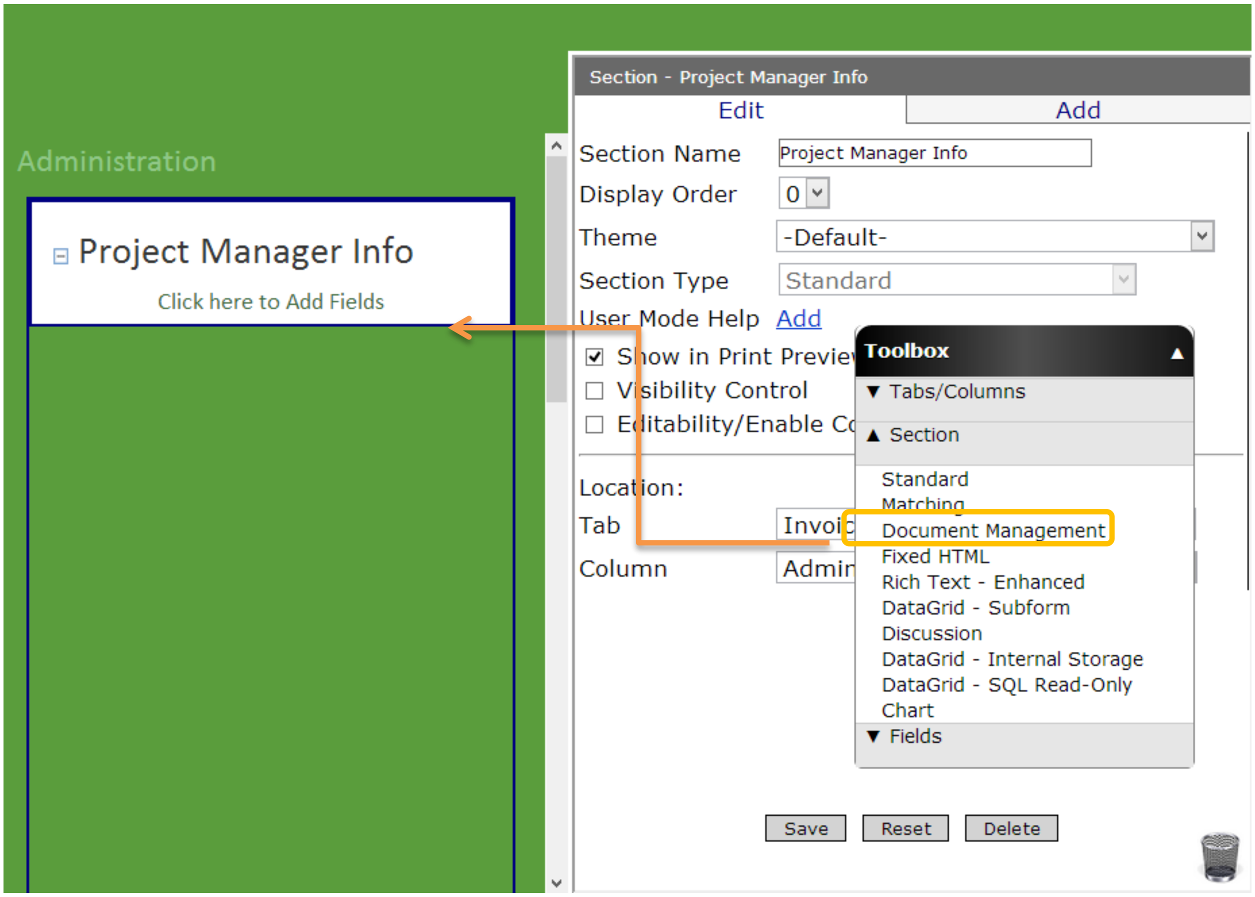
1. Om the properties box click in Column Name and Type Invoice Details
2. In the Column width type 50%
3. Click Save

❖ 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

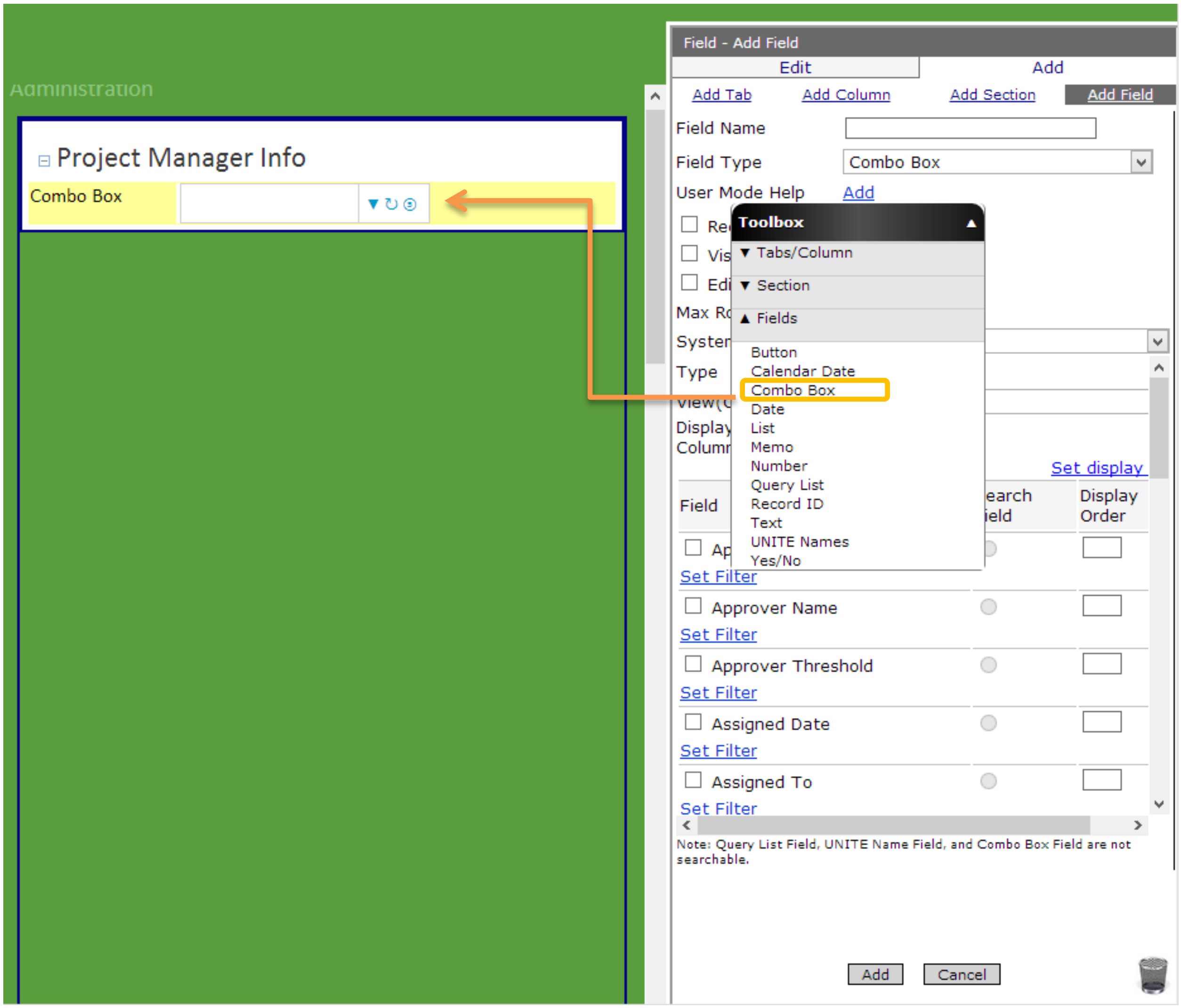
❖ Create a new Section named Project Manager.



Creating the Manager Section

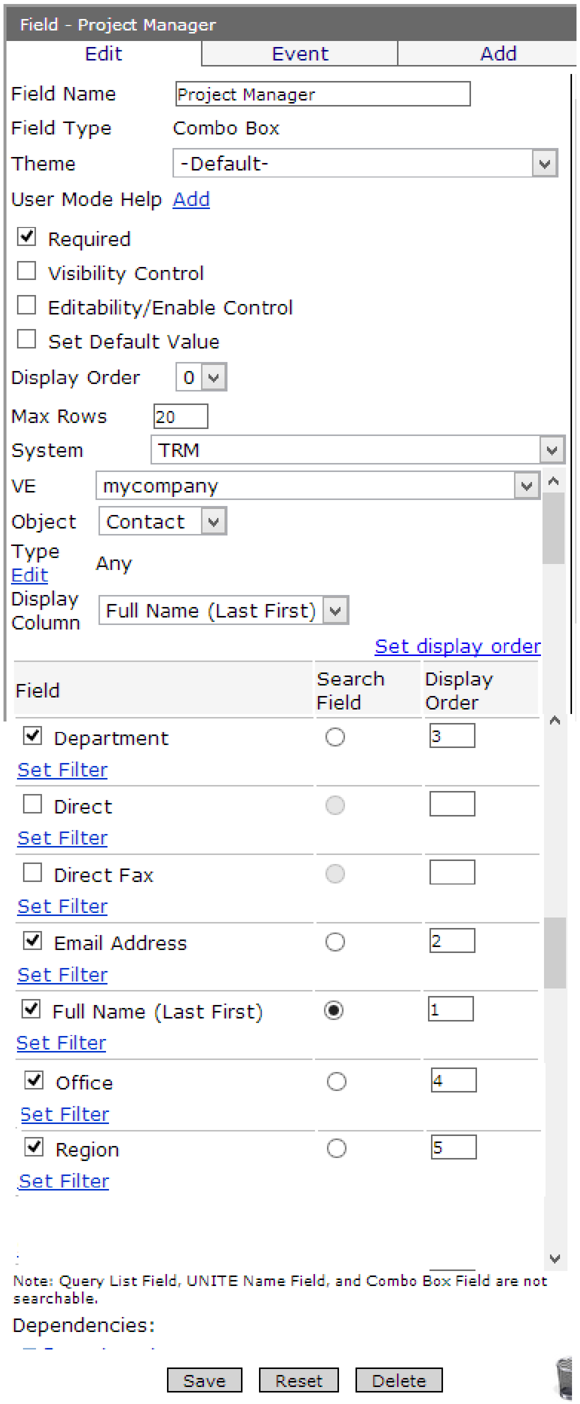
4. Drag and drop a new Section into the Form.
5. In the Properties Box click on Section Name and type *Project Manager Info.*
6. Click Save.

❖ 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

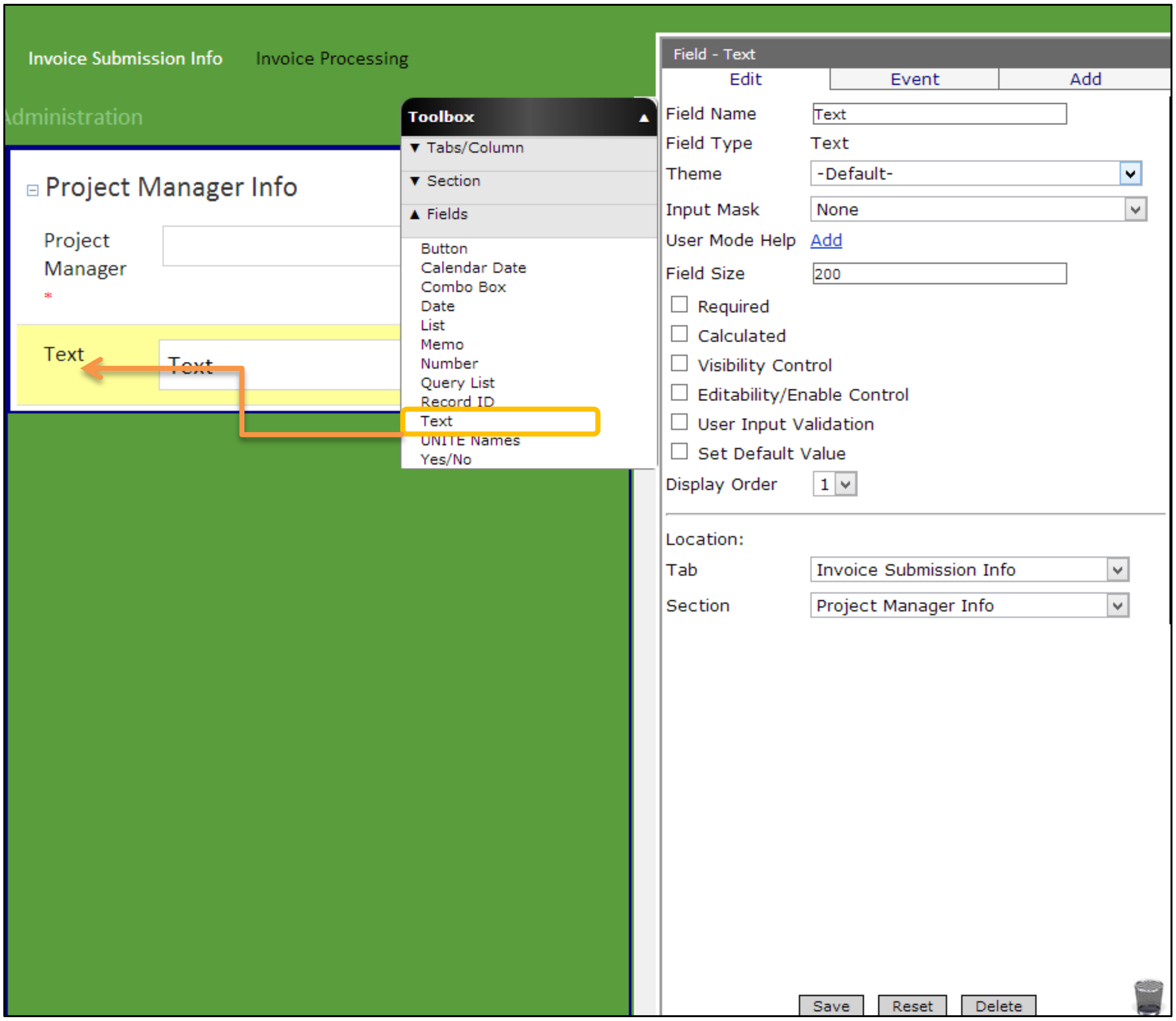
We will populate this combo box by utilizing the contact data already stored in Total Relationship Management™. Your application could use TRM, another WAG app or even a Query List.



❖ 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*.

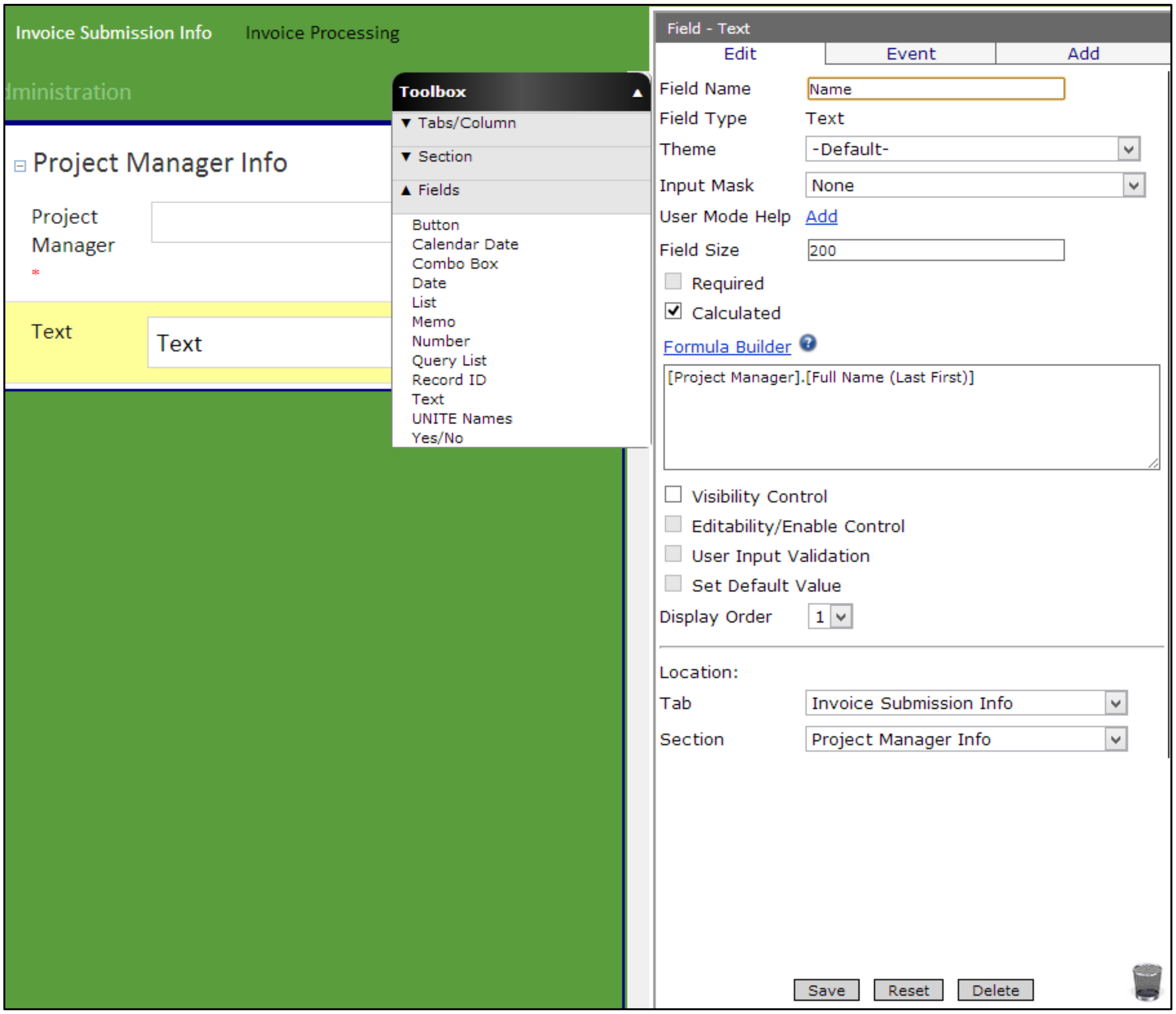
❖ Create a text Field Named Name



Finishing the Project Manager Section

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

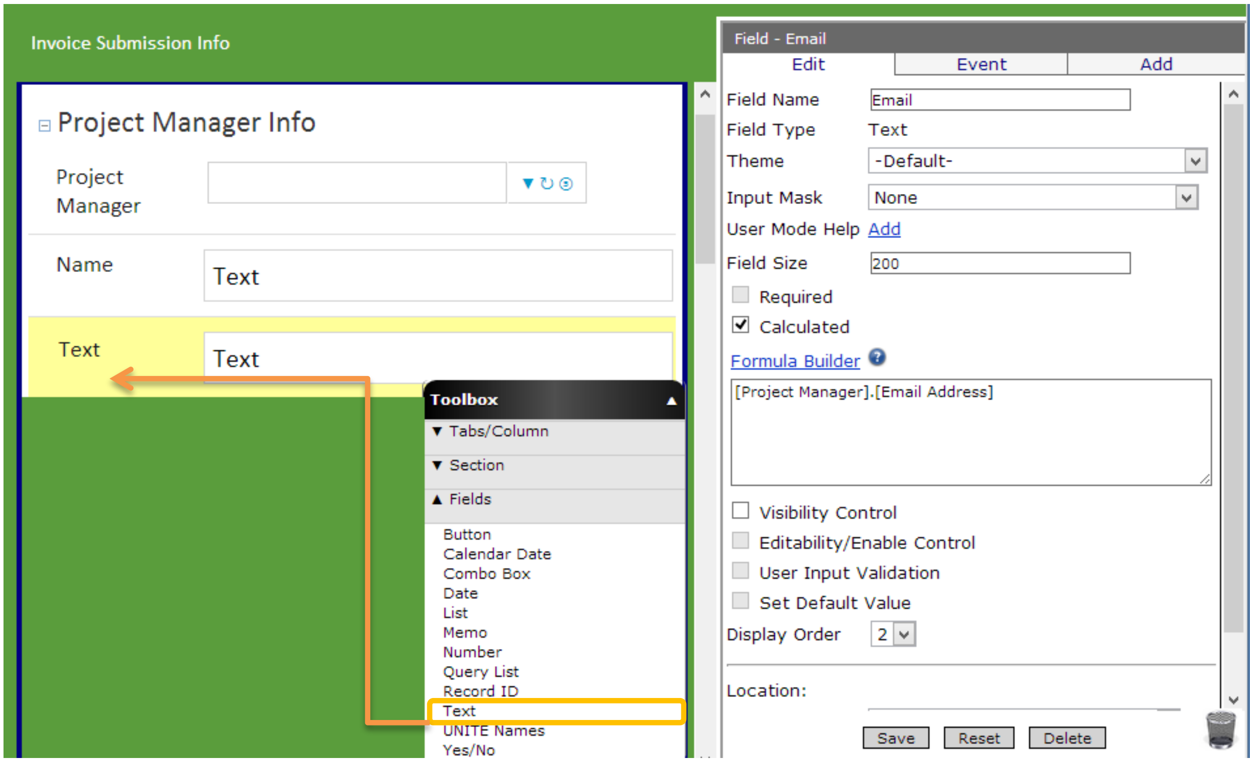
❖ Name the Text Field



3. Check Calculated.
4. Check Formula Builder.
5. Enter the following formula:

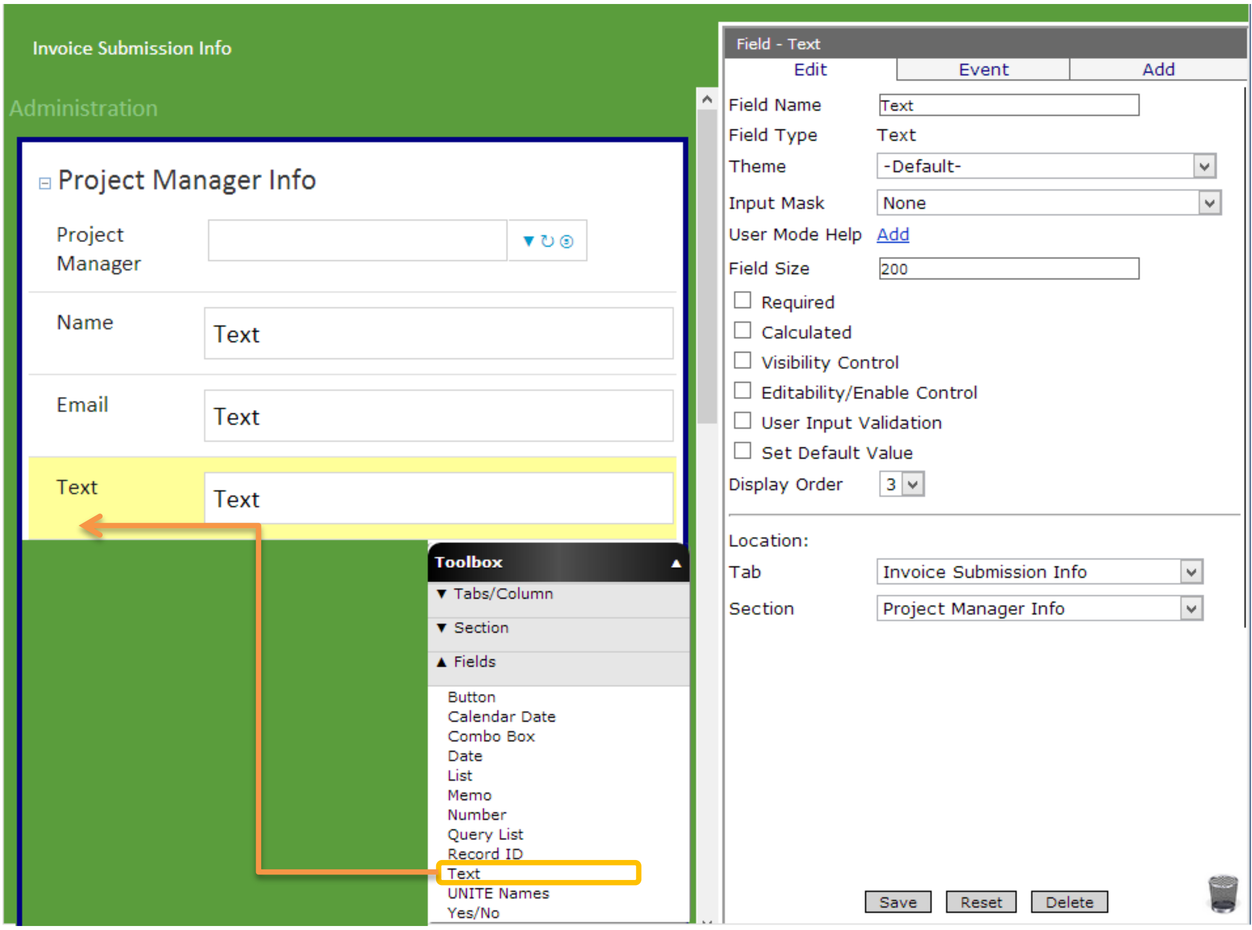
   [Project Manager].[Full Name (Last First)]

❖ Create a text Field Named Email



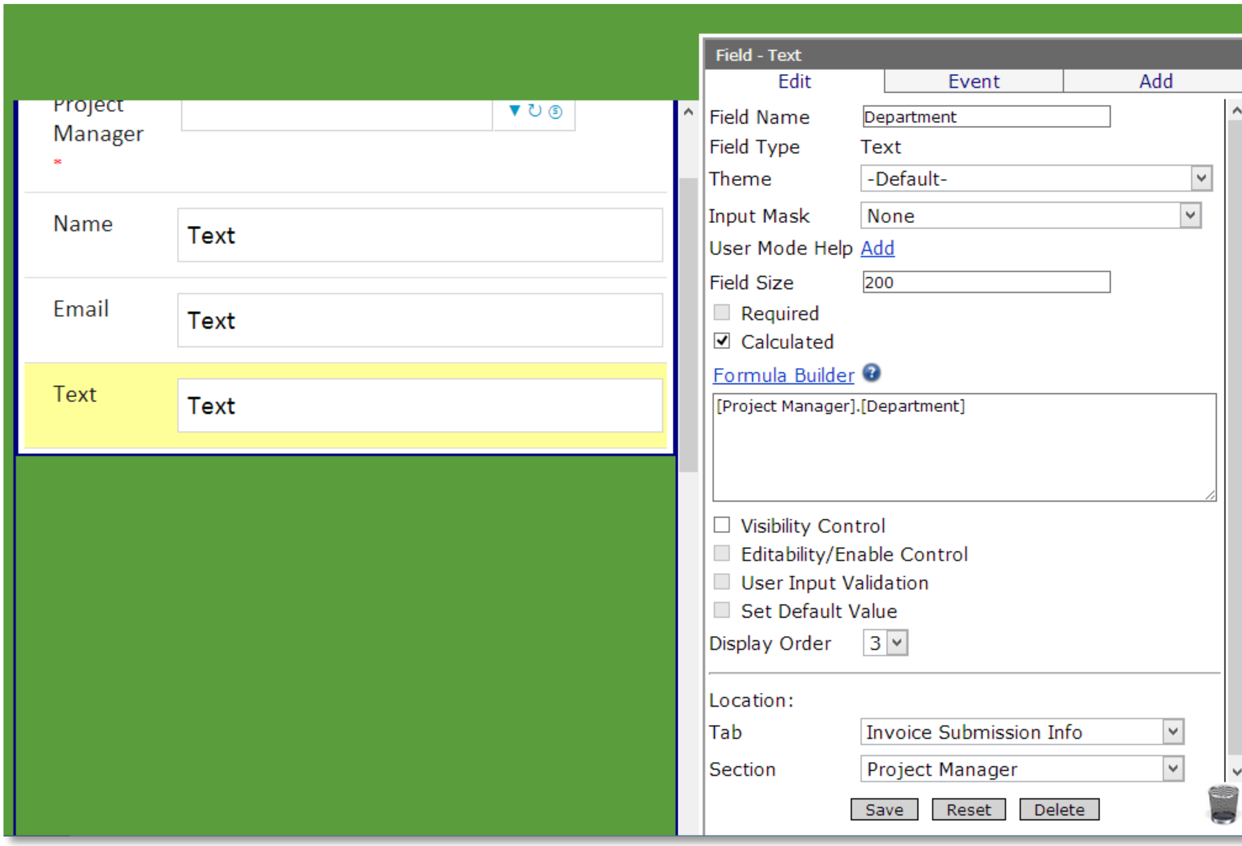
1. Drag and drop a Text Field into our Form.
2. Name this field Email.
3. Check Calculated.
4. Check Formula Builder.
5. Enter the following formula:
   [Project Manager].[Email Address]

❖ Create a text Field Named Department



✓ Drag and drop a Text Field into our Form.

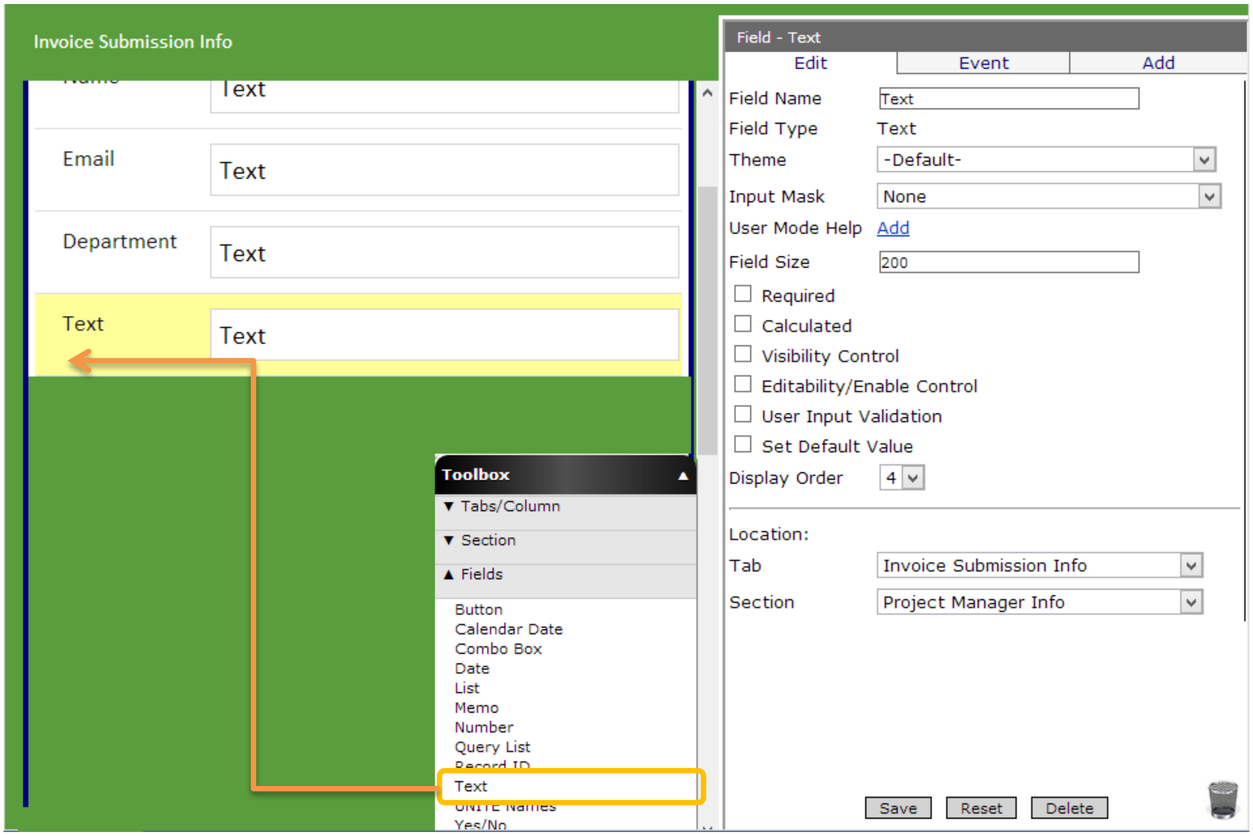
❖ Name the text field



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

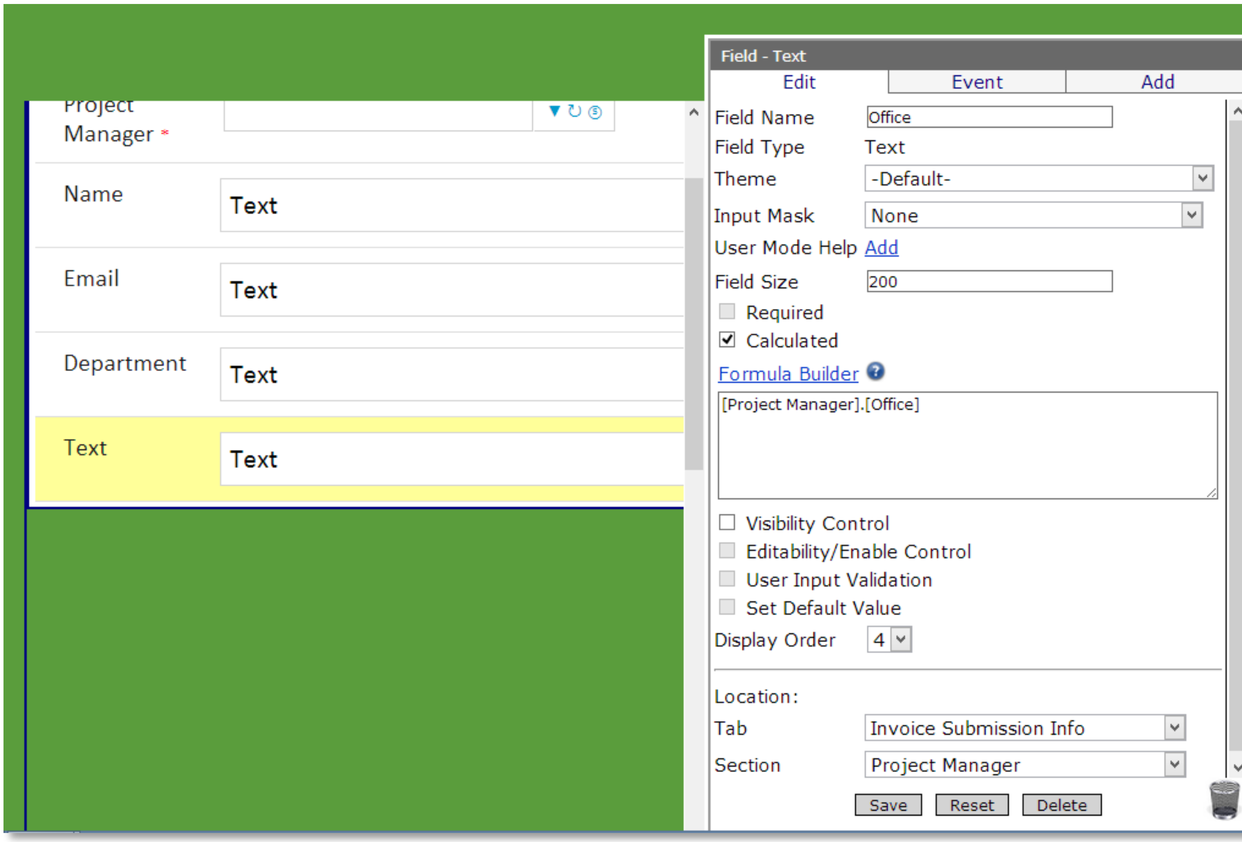
   [Project Manager].[Department]

❖ Create a text Field Named Office



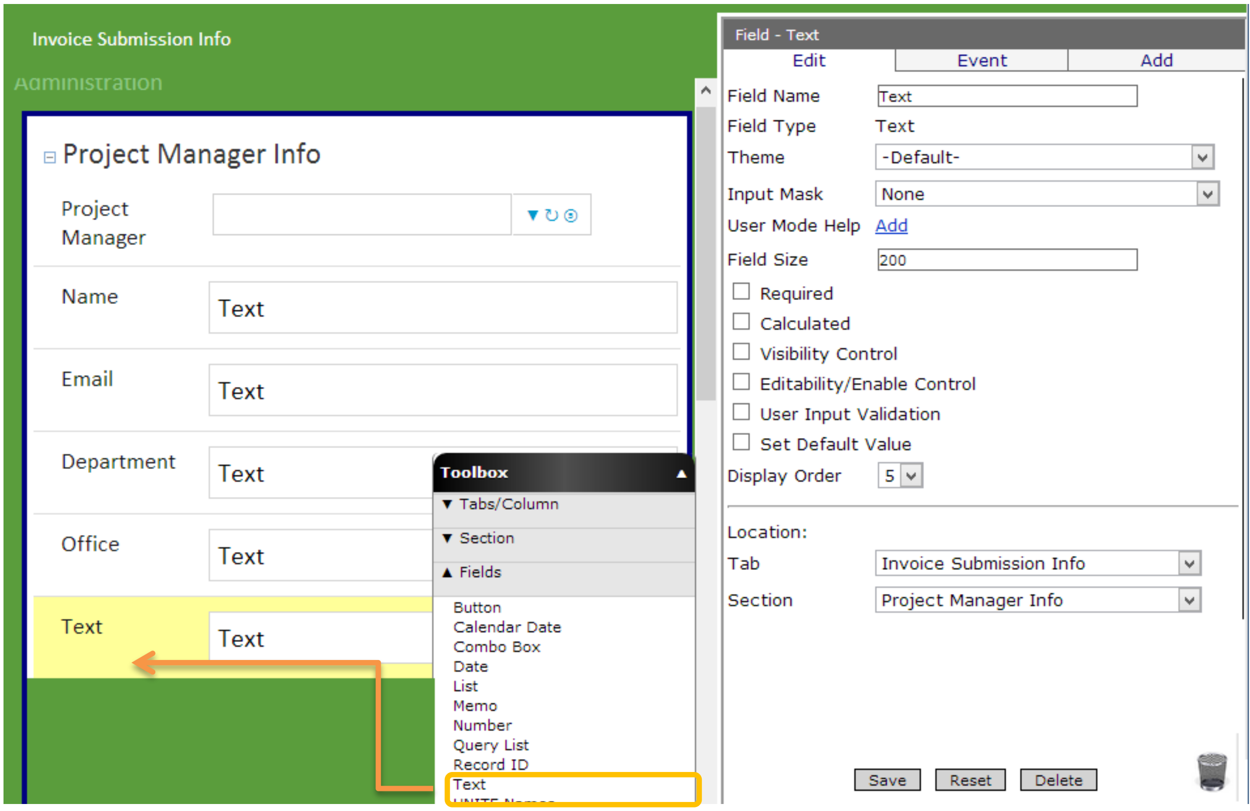
✓ Drag and drop a Text Field into our Form.

❖ Name the text field



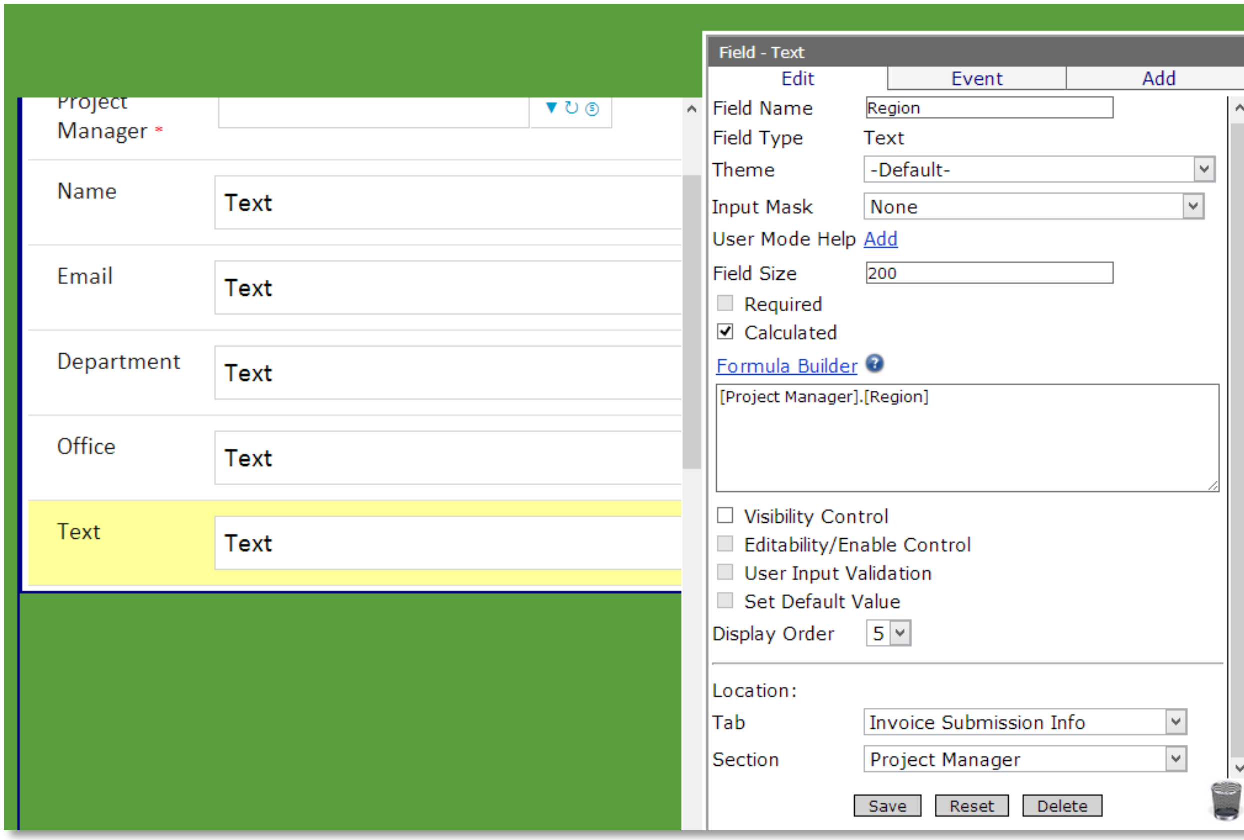
1. Name this field "Office".
2. Check Calculated.
3. Check Formula Builder.
4. Enter the following formula:
   [Project Manager].[Office]

❖ Create a text Field Named Region



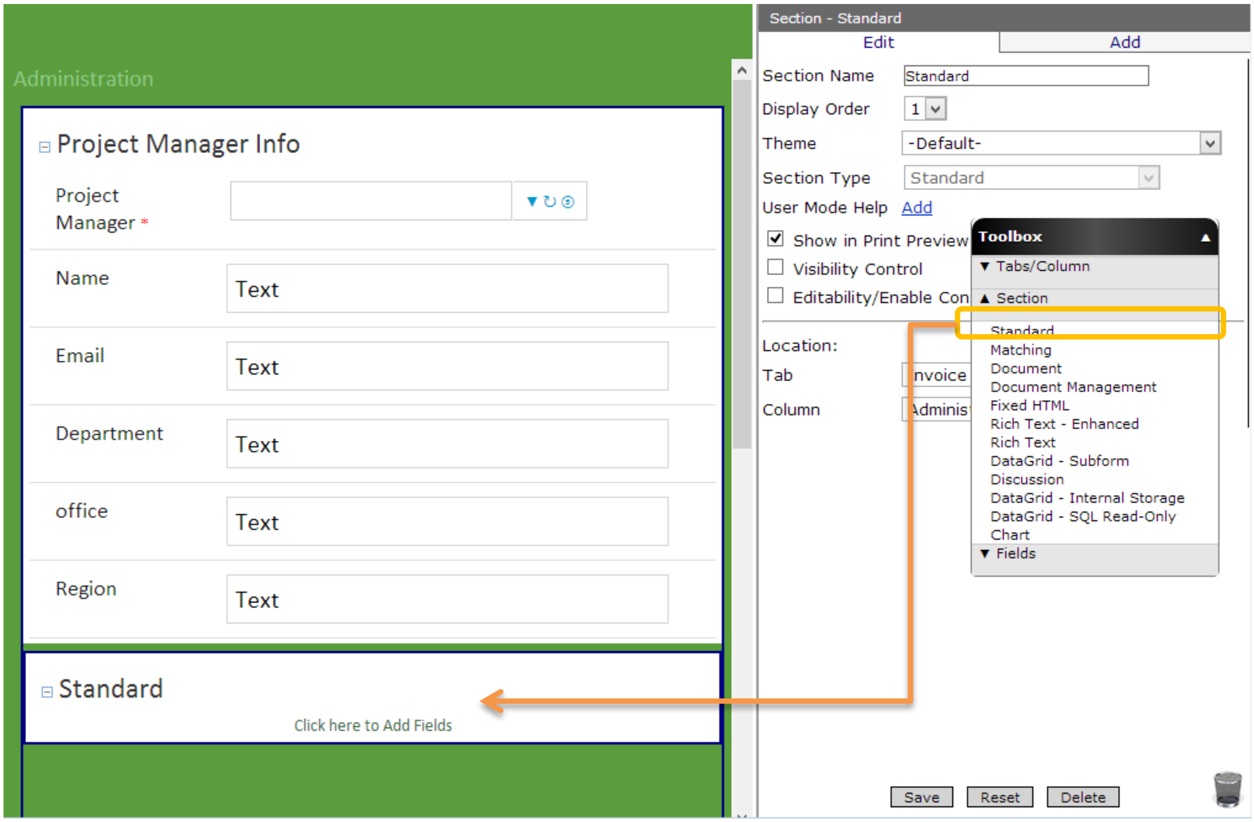
✓ Drag and drop a Text Field into our Form.

❖ Name the Text field



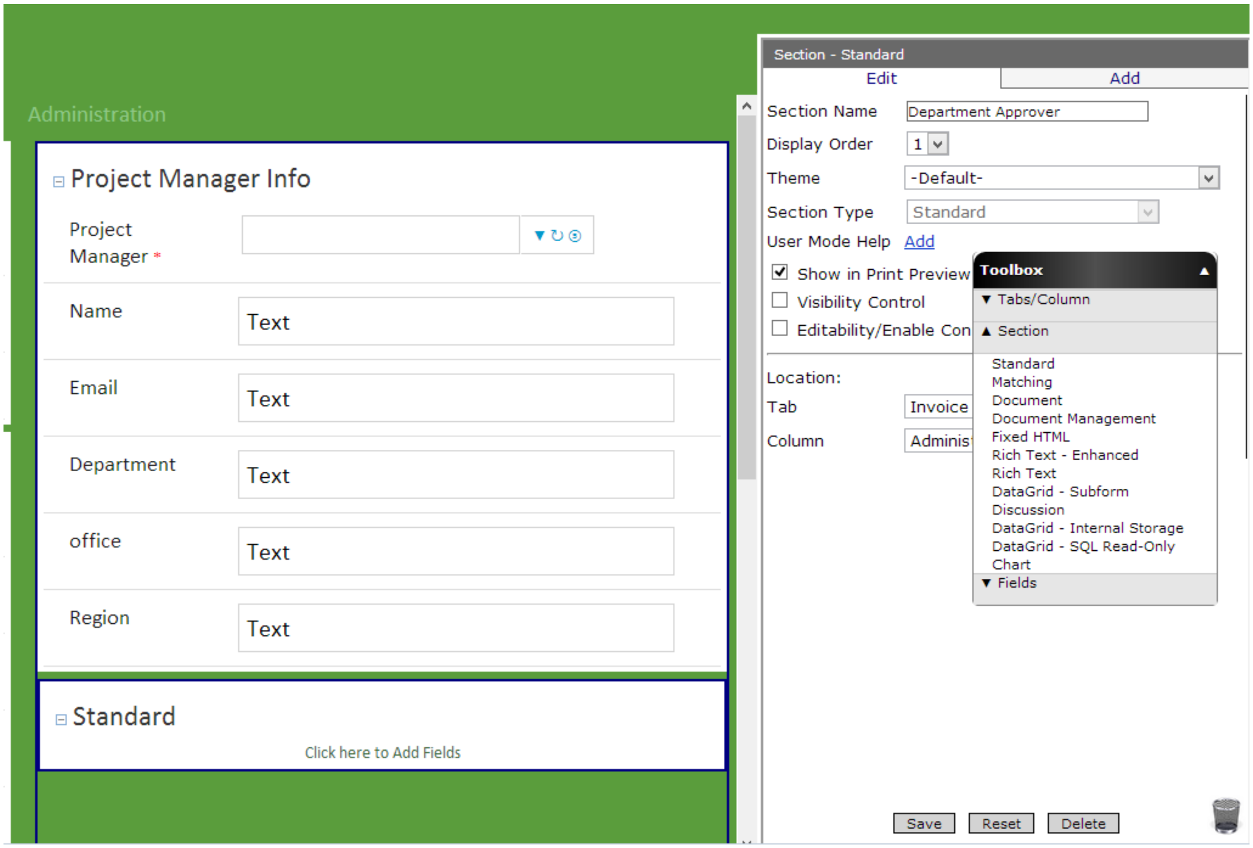
1. Name this field "Region".
2. Check Calculated.
3. Check Formula Builder.
4. Enter the following formula:
   [Project Manager].[Region]

❖ Create New Section Named Department Approver



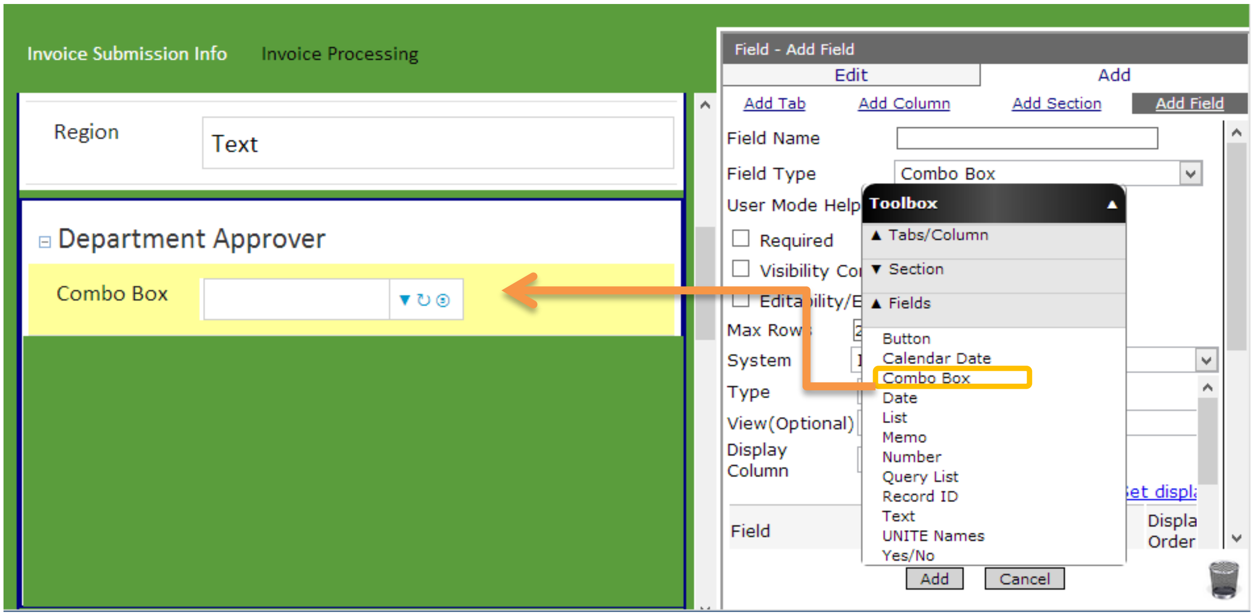
✓ Drag and drop a Standard Section into the form from the Toolbox.

❖ Name the New Section



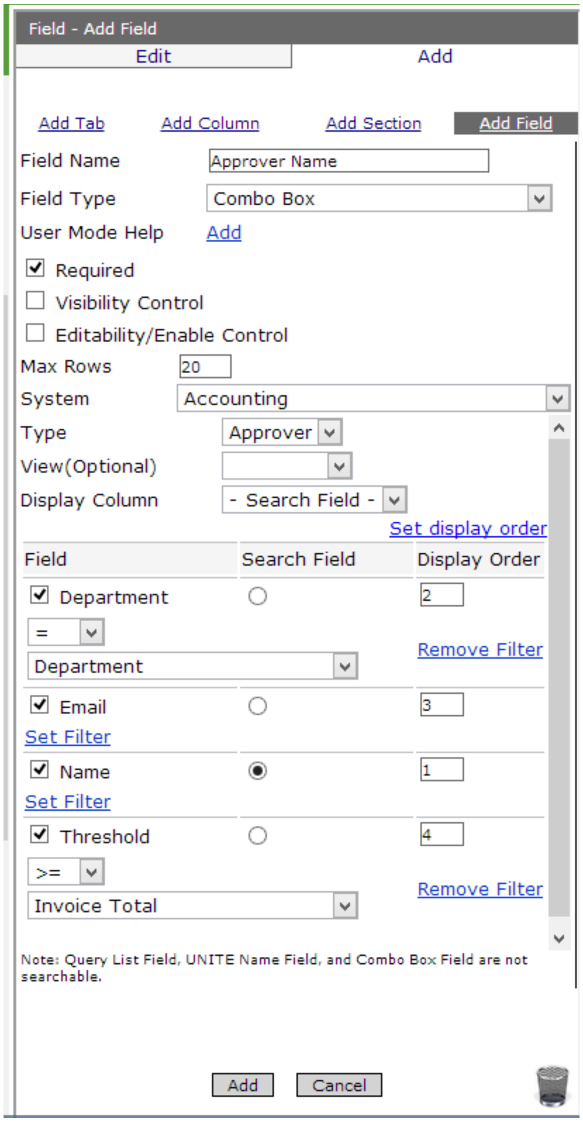
1. In the Properties box click in Section name and type Department Approver
2. Click Save

❖ Create A Combo Box Named Approver Name



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

❖ Name the Combo Box

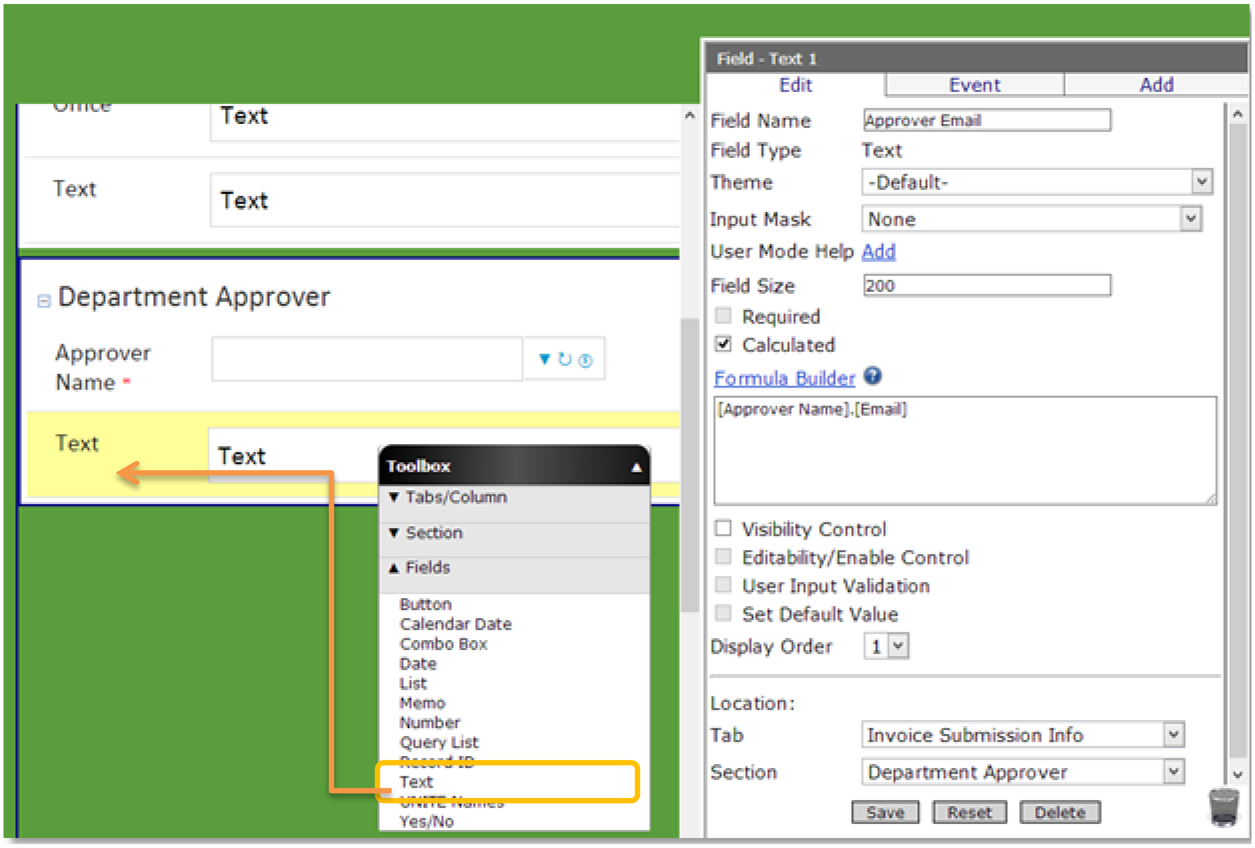


1. Name this combo box "Approver Name"

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

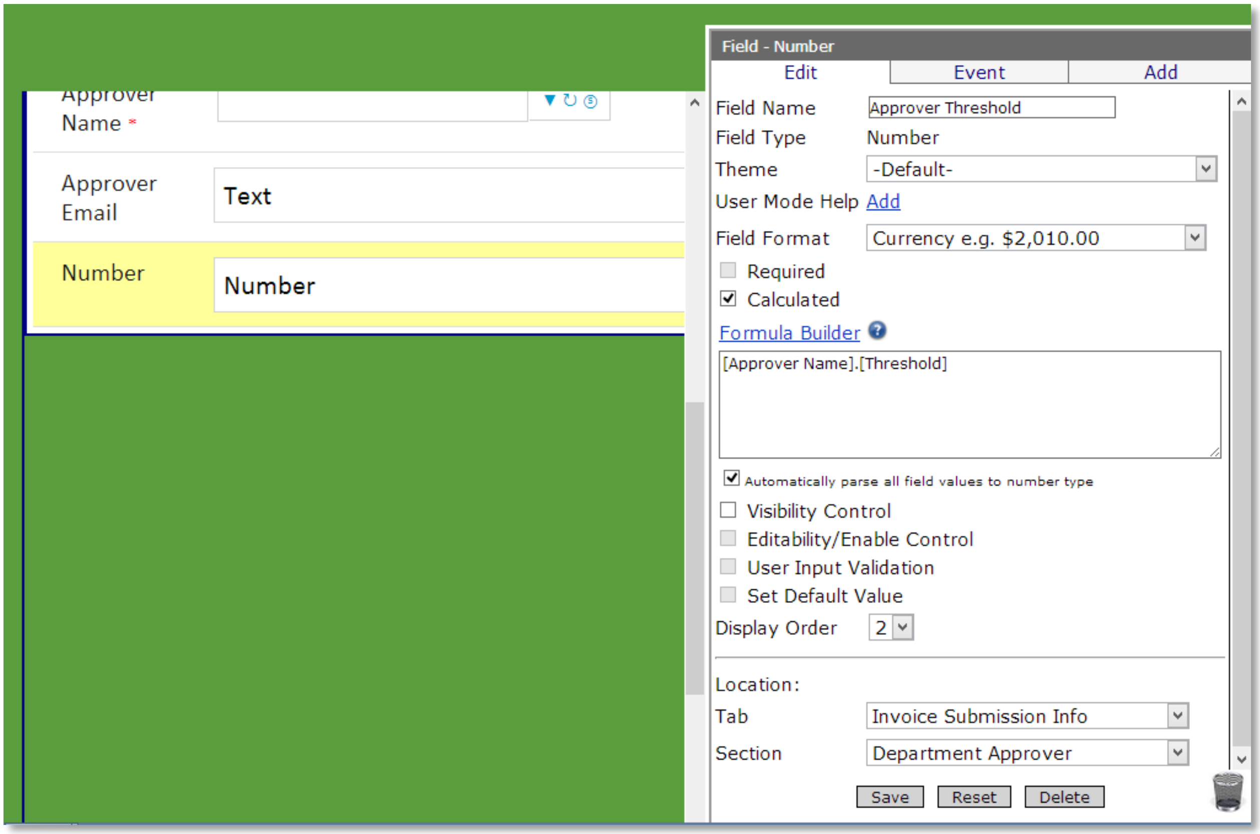
❖ Create a Text Field Named Approver Email.



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]

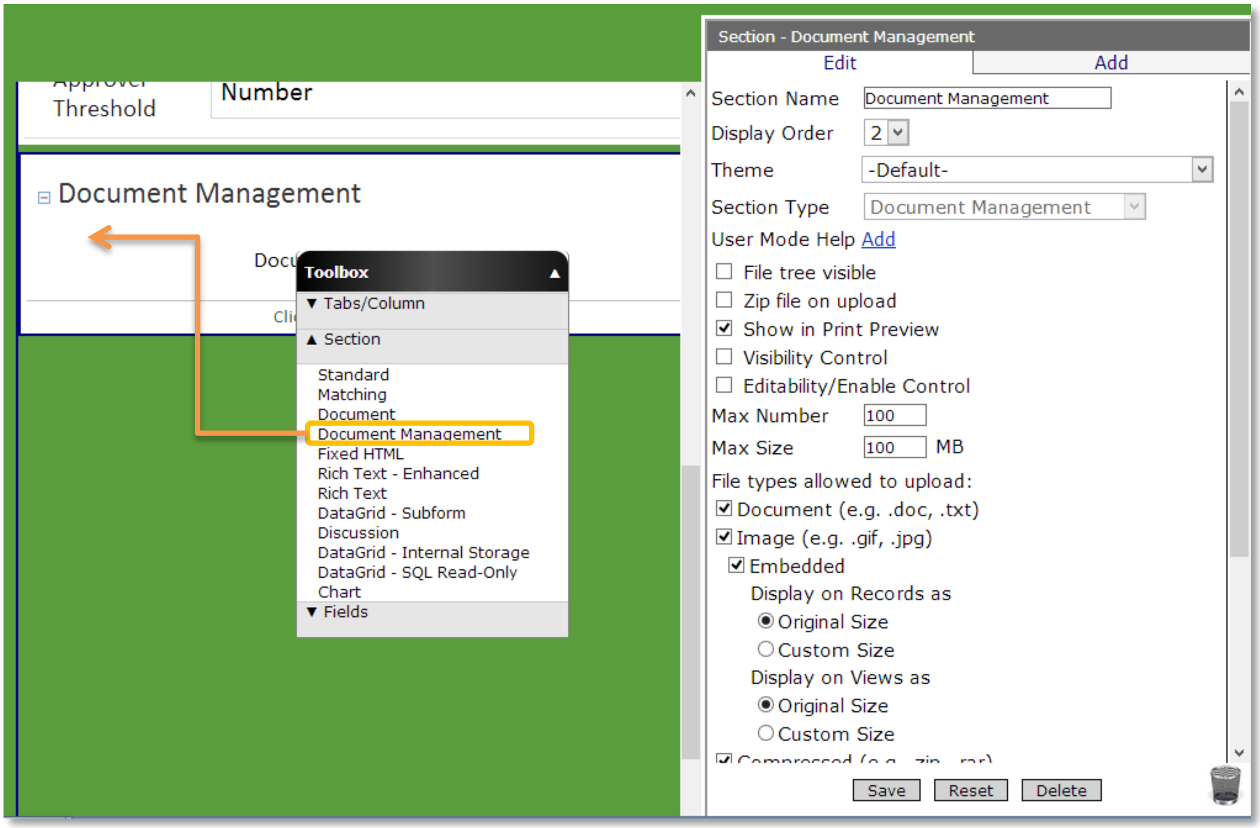
❖ Create A Number Field Named Approver Threshold



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

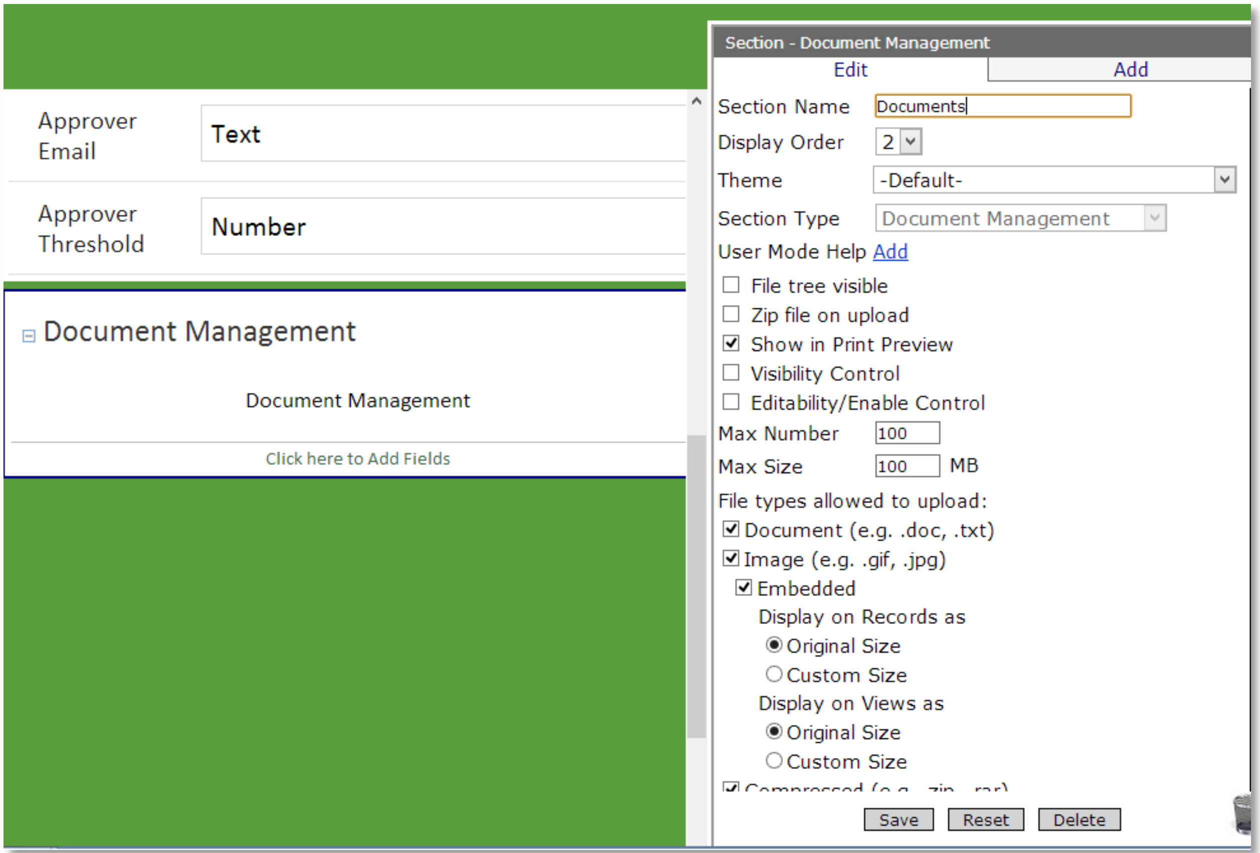


Adding a Documents Section

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.

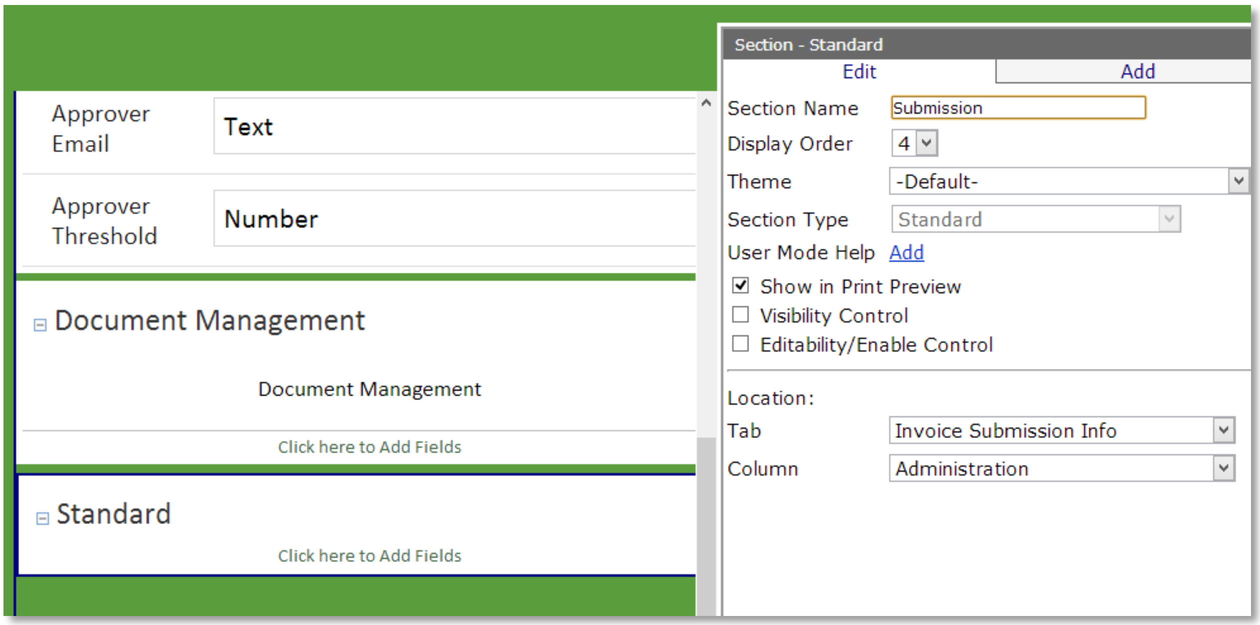
1. Drag and drop a Document Management Section into our form from the Toolbox.

❖ Name the Section



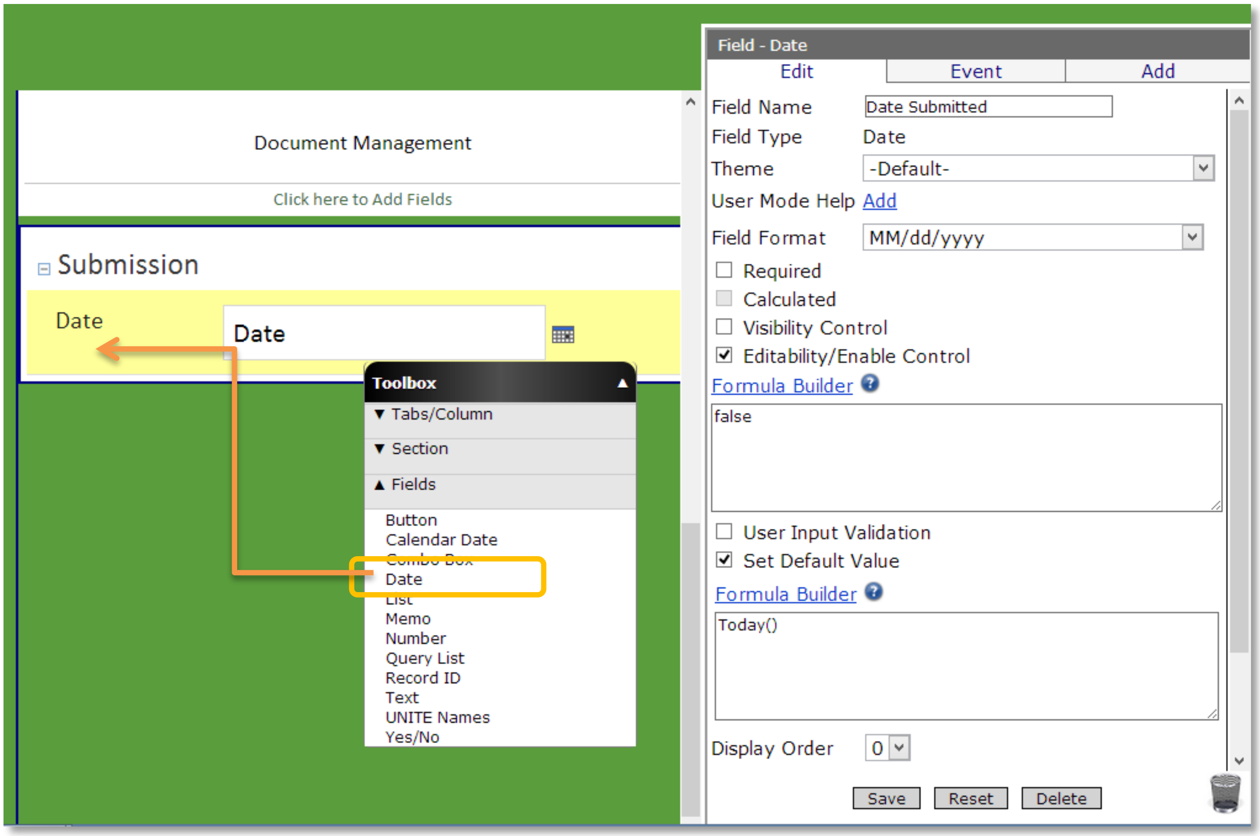
1. Name this section Documents
2. Make sure that Document, Image, Compressed, Video, Audio and PDF File are checked.
3. Click Save.

❖ Create A Section Named Submission



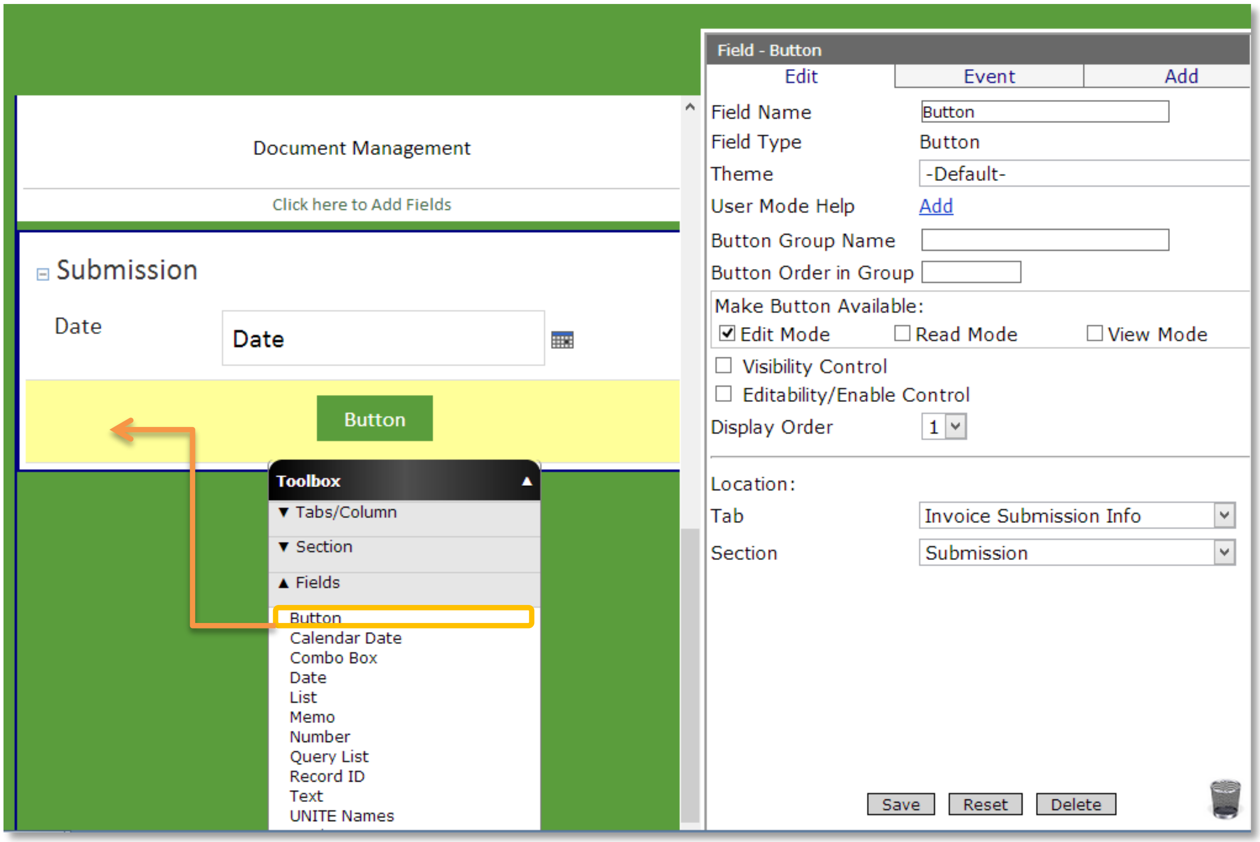
1. Drag and drop a Standard section into our form.
2. Name this section Submission
3. Click Save

❖ Create a Date Field Named Date Submitted



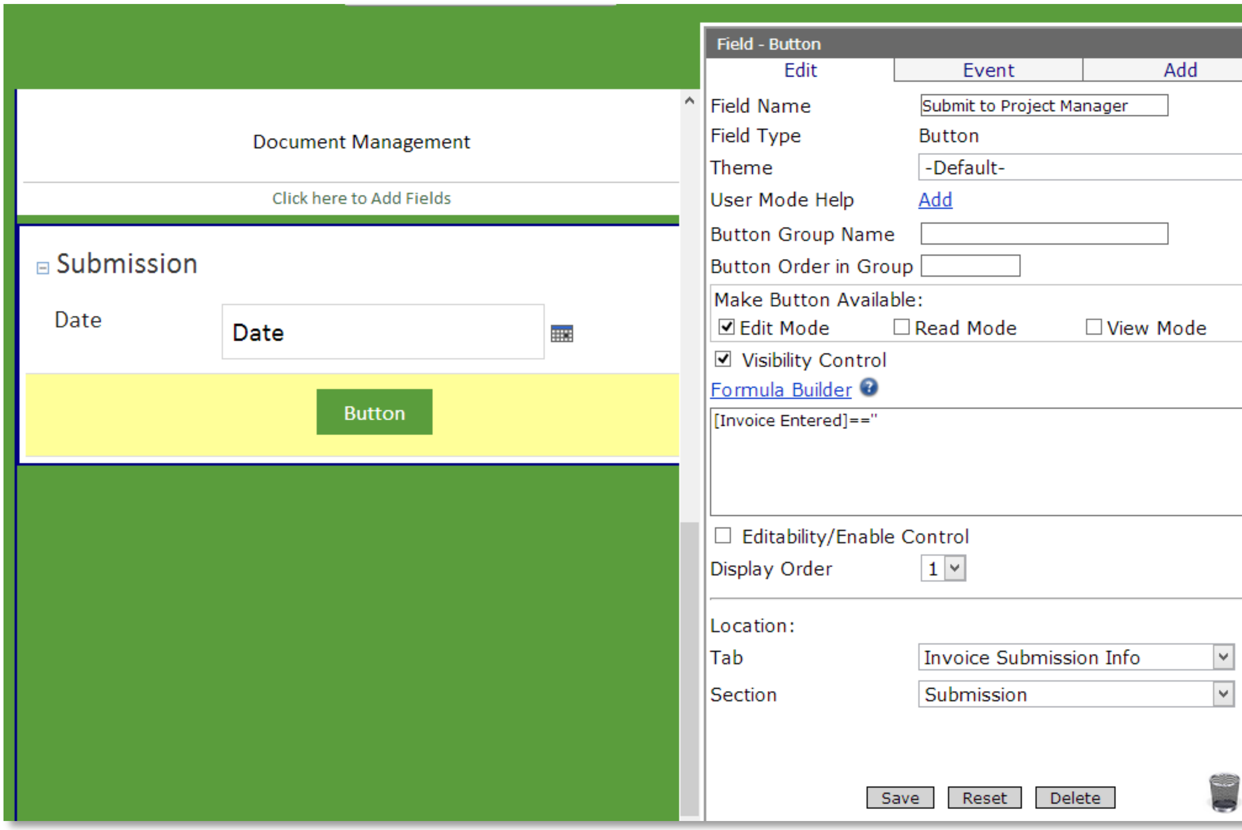
1. Drag and drop a Date field into this section.
2. Name this field Date Submitted

❖ Create a Button Named Submit to Project Manager



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

❖ Name the Button



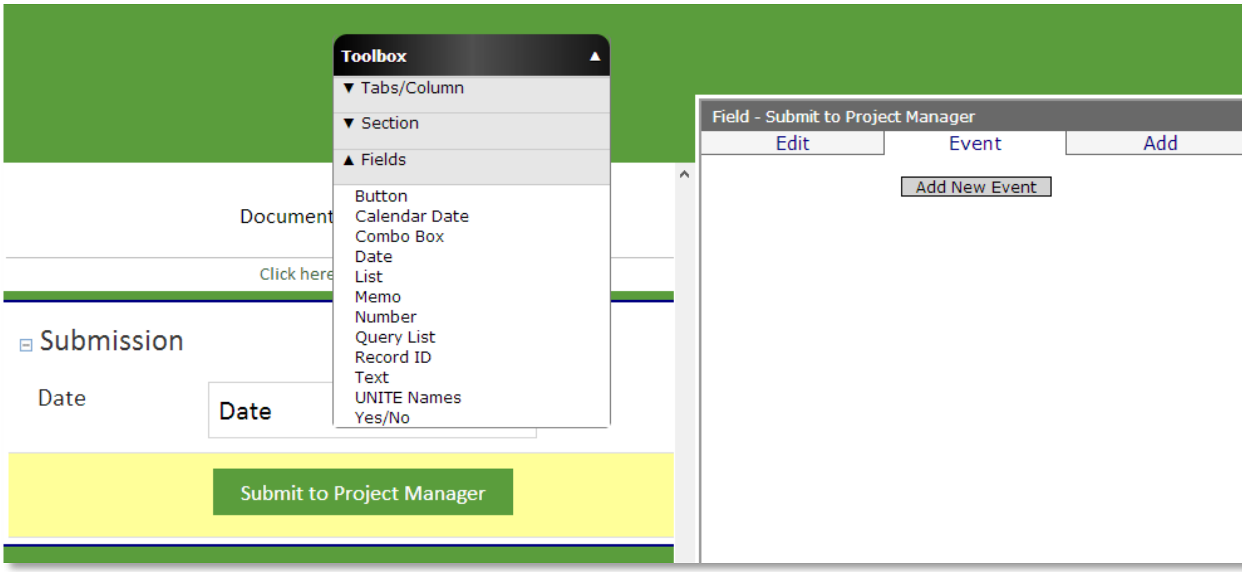
1. Name this button "Submit to Project Manager."

✓ 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:

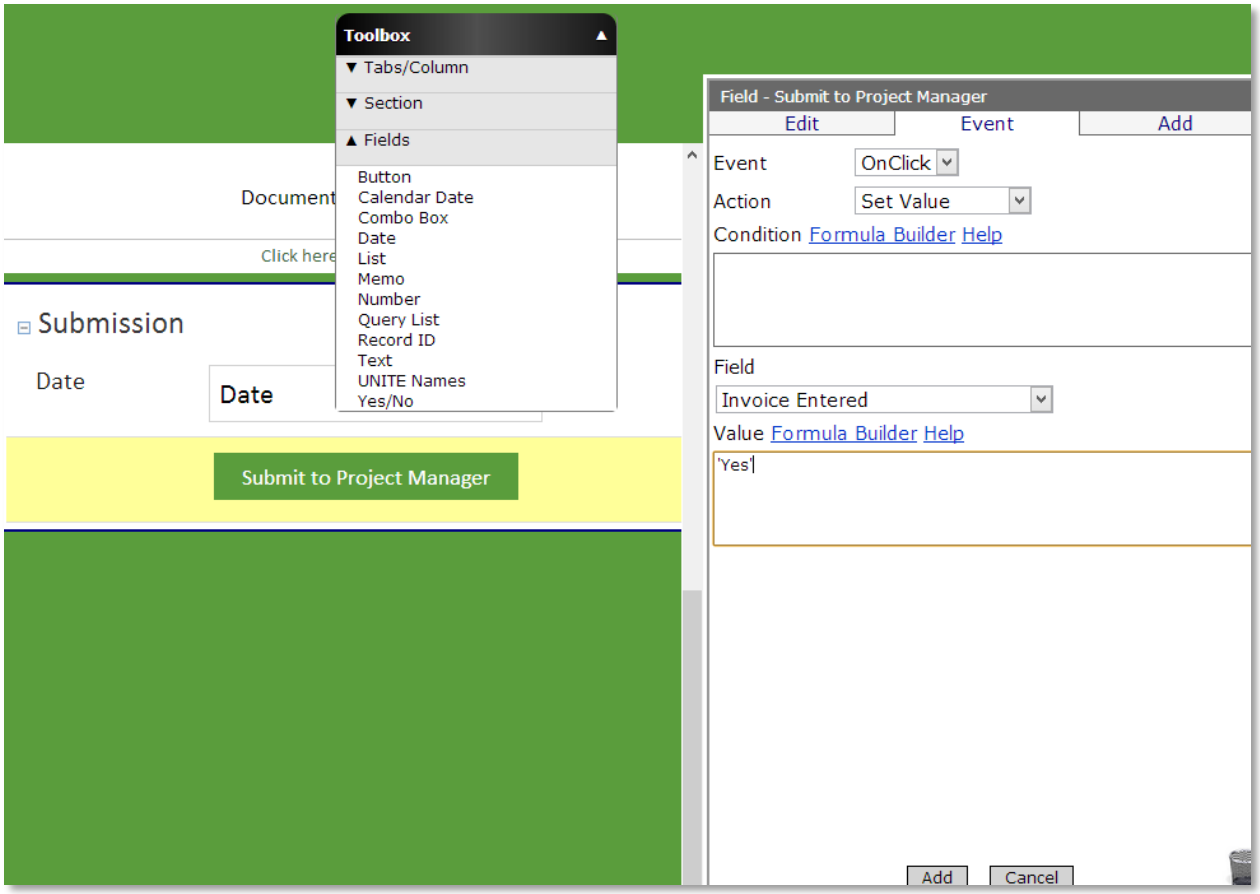
   [Invoice Entered]==''

✓ Thus, only while the Invoice Entered flag is empty will the submit button be visible.

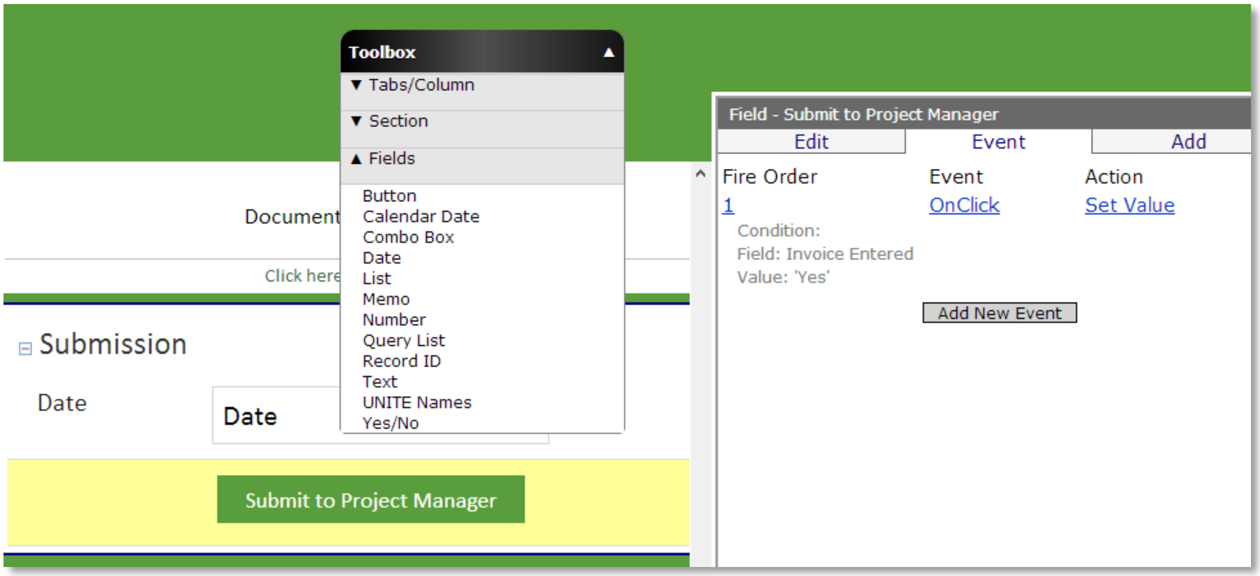


- ✓ We want this button to save our invoice, flag it as entered and email it to the project manager. The following screens will how to do this

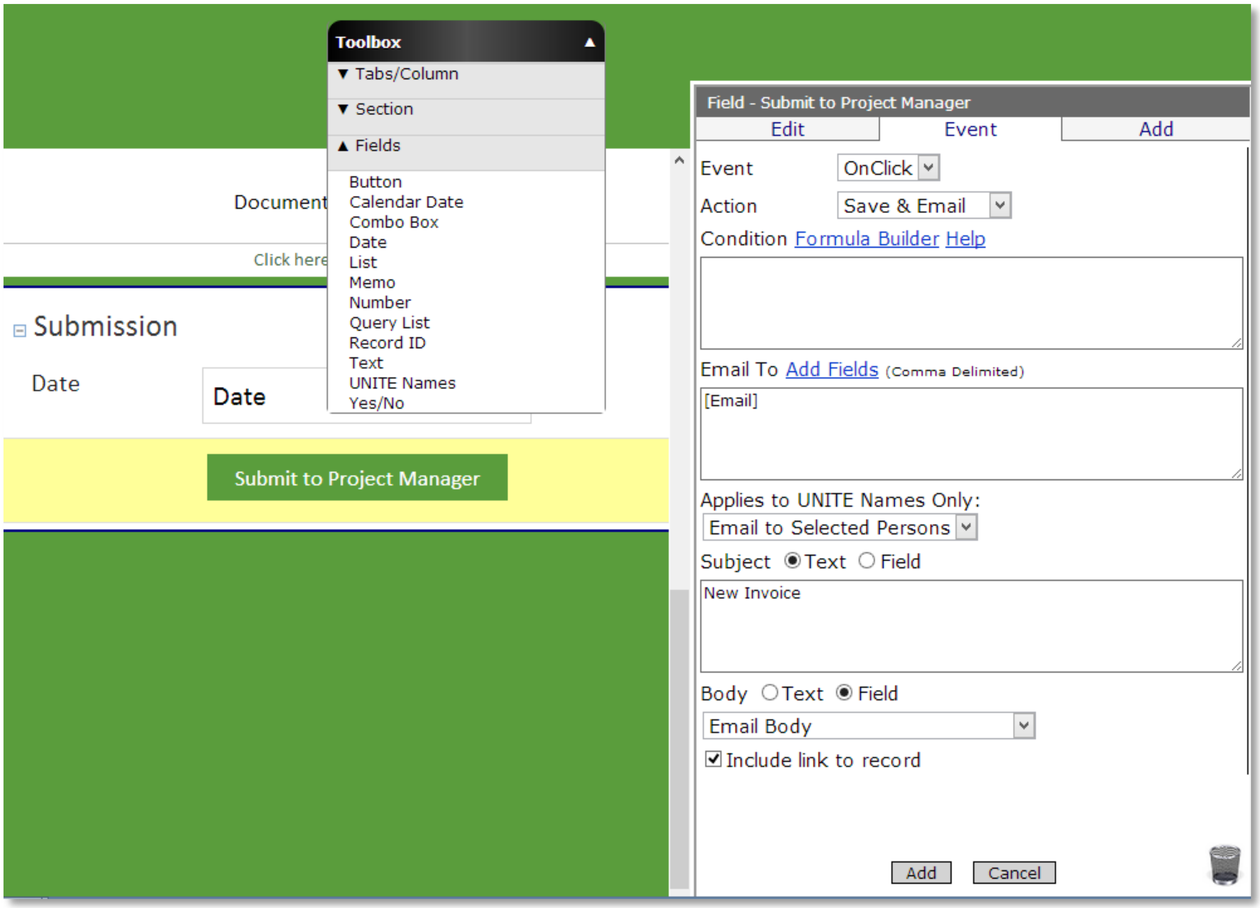
1. Click on Event in the Properties tab.
2. Click "Add New Event"



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.



Click "Add New Event"



1. Select "Save & Email" from the Action dropdown menu.

2. Type ***[Email]*** in the *Email To field*

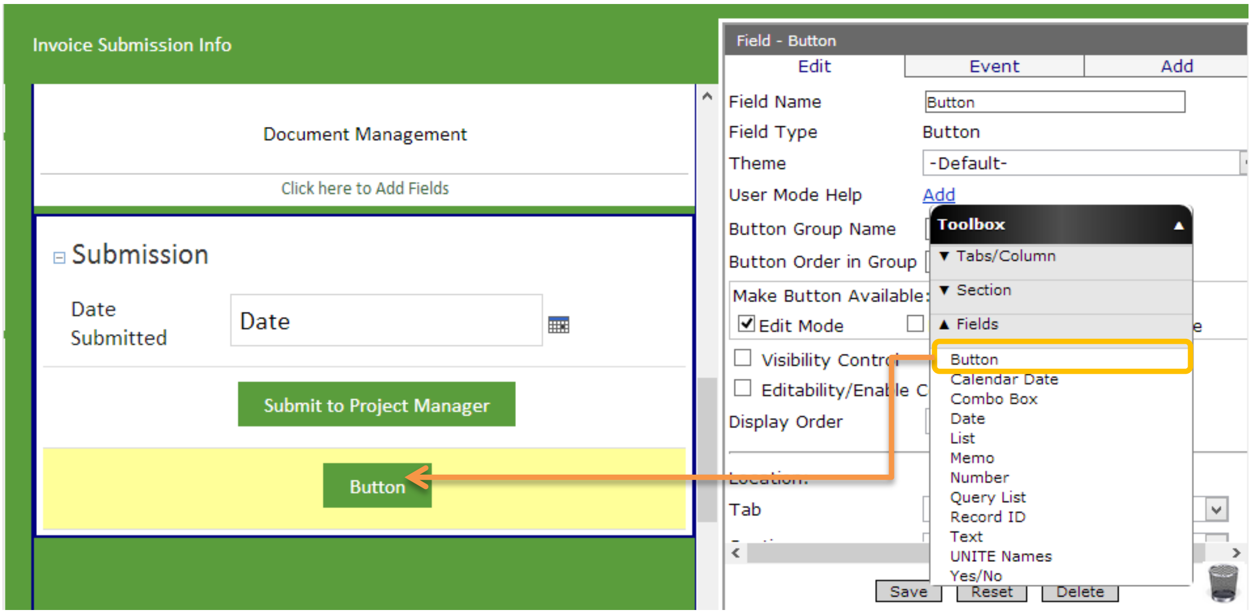
3. Type ***New Invoice*** in the Subject text field.

4. Click *Field* next to *Body*

5. Select Email *Body* from the dropdown menu beneath *Body*.

6. Check *Include link to record.*

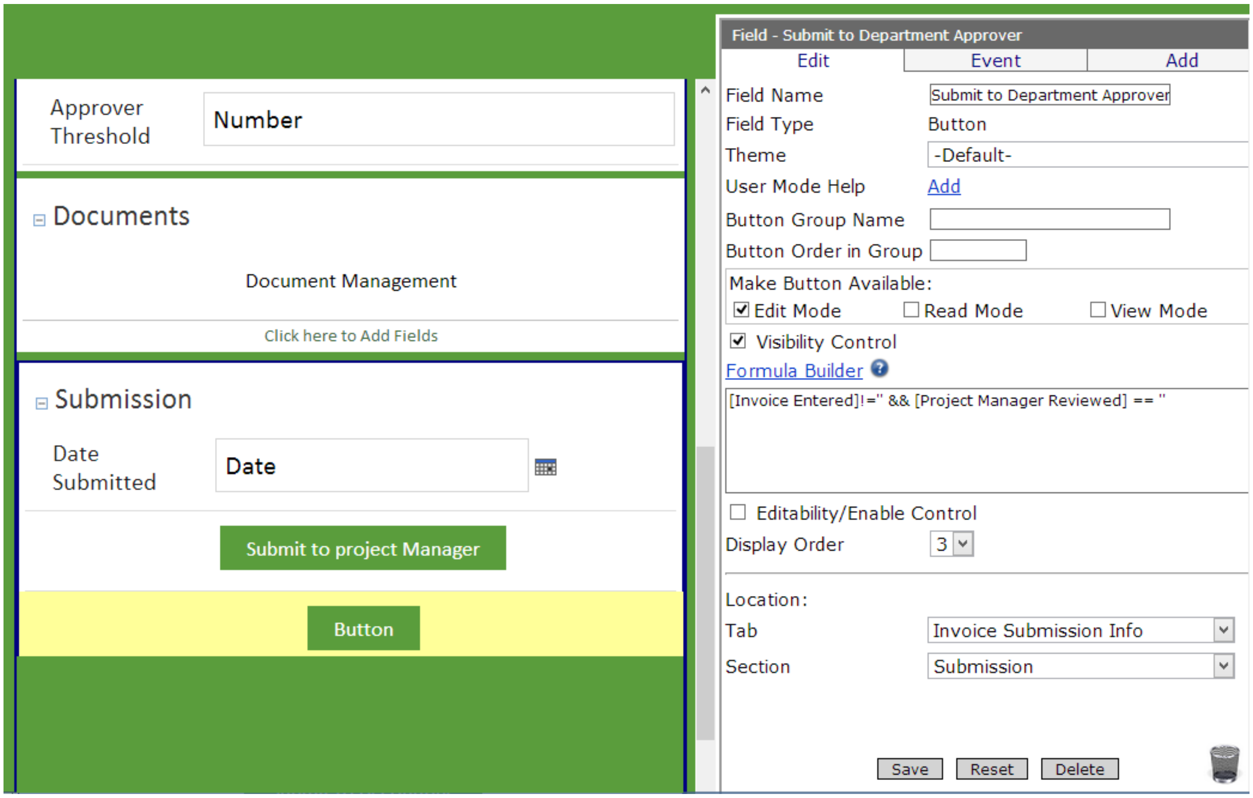
❖ Create Button named Submit to Department Approver



✓ 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

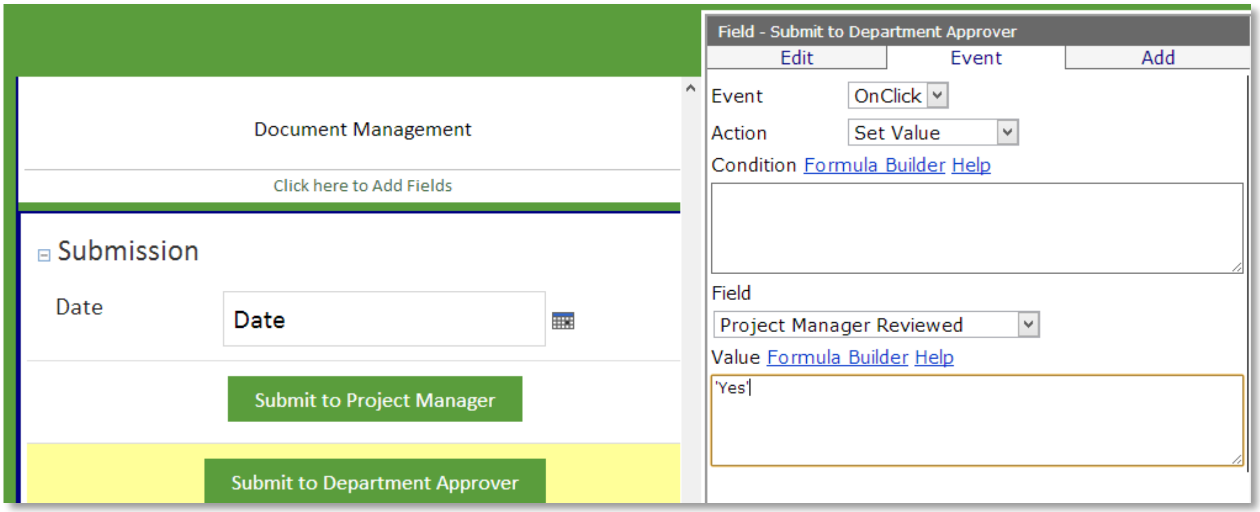
❖ Name the button



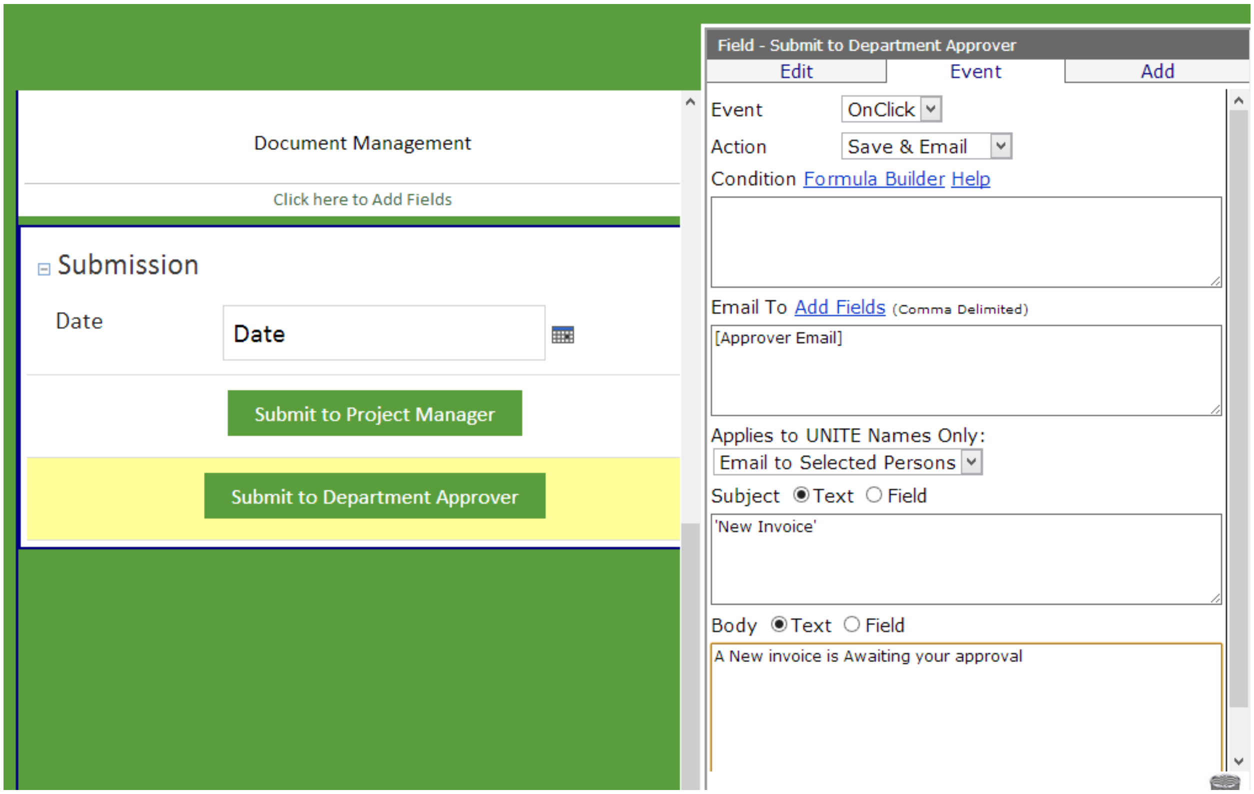
1. In the Properties Box click in Field Name and Type *Submit to Department Approver.*
2. Check the Visibility Control and put the following formula: *[Invoice Entered]!='' && [Project Manager Reviewed] == ''*

3. Click Save

❖ Forming the Button

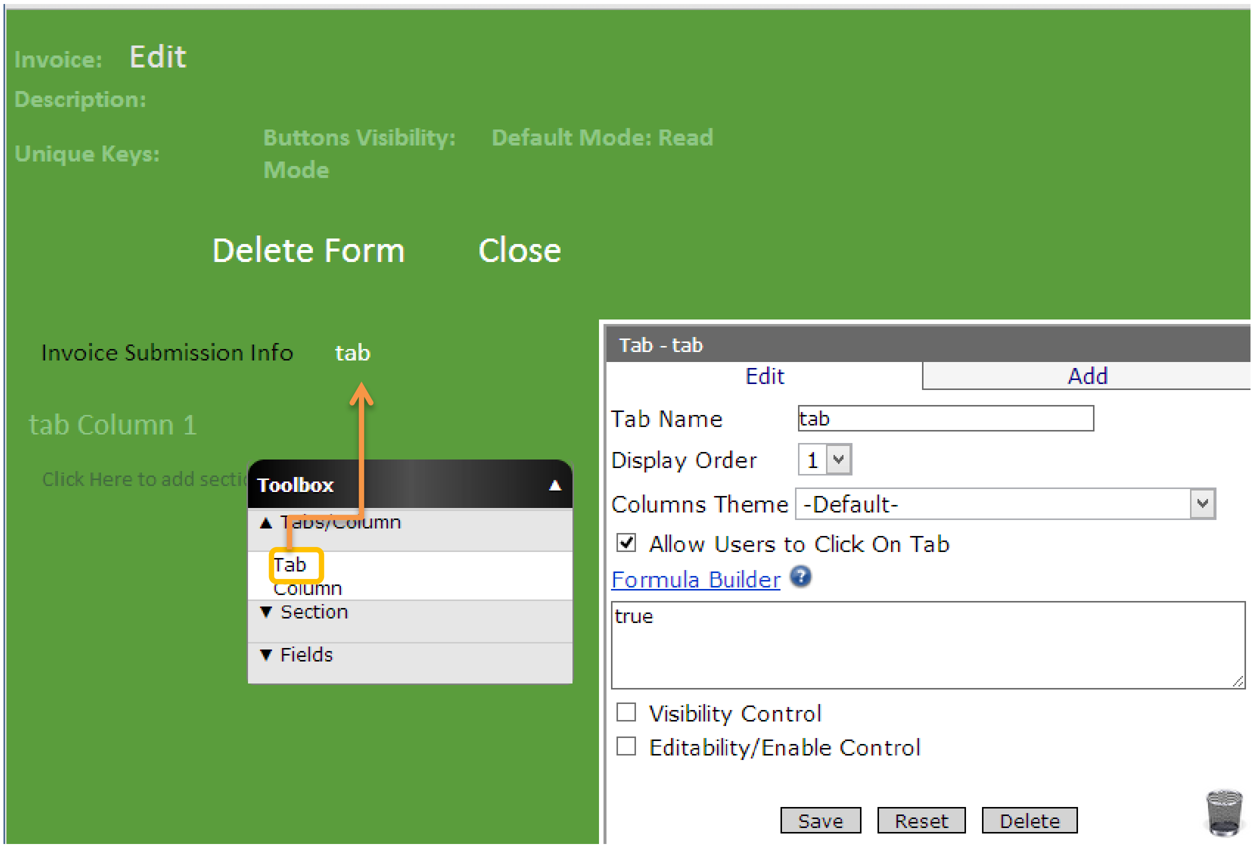


1. Name this button Submit to Department Approver.
2. Click on Event in the Properties tab.
3. Click *Add New Event*
4. Select ***Set Value*** from the Action dropdown menu.
5. Select *Invoice Manager Reviewed* from the *Field* dropdown menu.
6. Click **Formula Builder** and enter the following formula: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



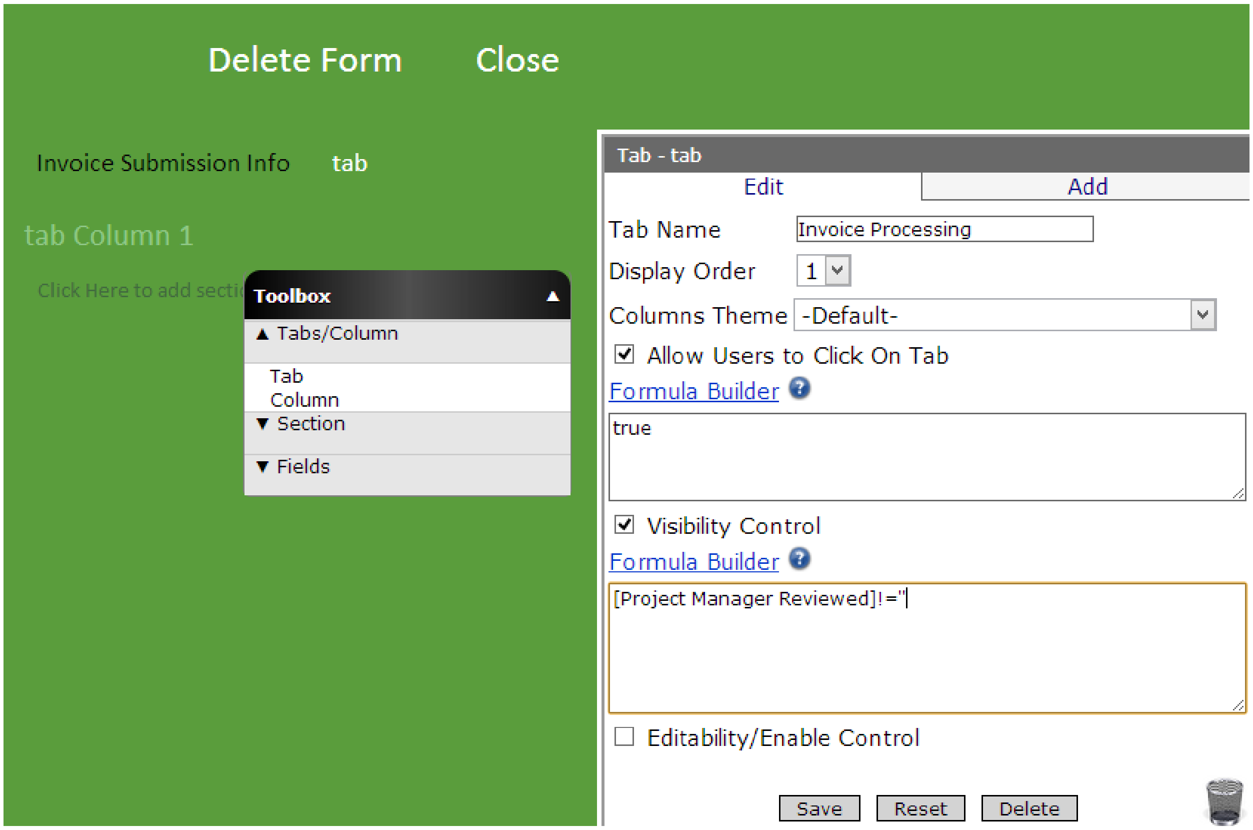
8. Click Add New Event
9. Select Save & Email from the Action dropdown menu.
10. Click Add Fields next to the *Email To* formula box.
11. Select ***[Approver Email]*** from the list.
12. Type *New Invoice* into the Subject text box.
13. Type ***A new invoice is awaiting your approval*** into the *Body*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

❖ Create a new Tab Named Invoice Processing



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

❖ Name the new tab.



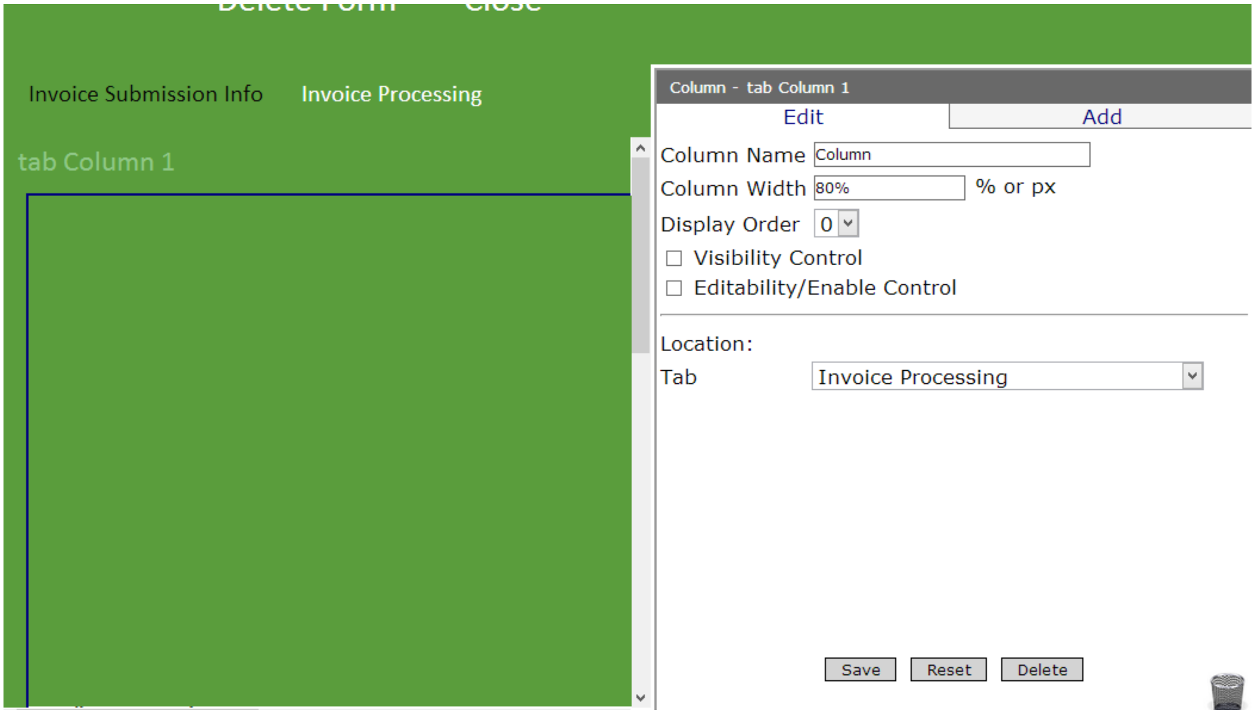
1) Click in the *Tab Name* and type ***Invoice Processing***.

2) Check Visibility control, click on formula builder and put the following formula:

[Project Manager Reviewed]!=''

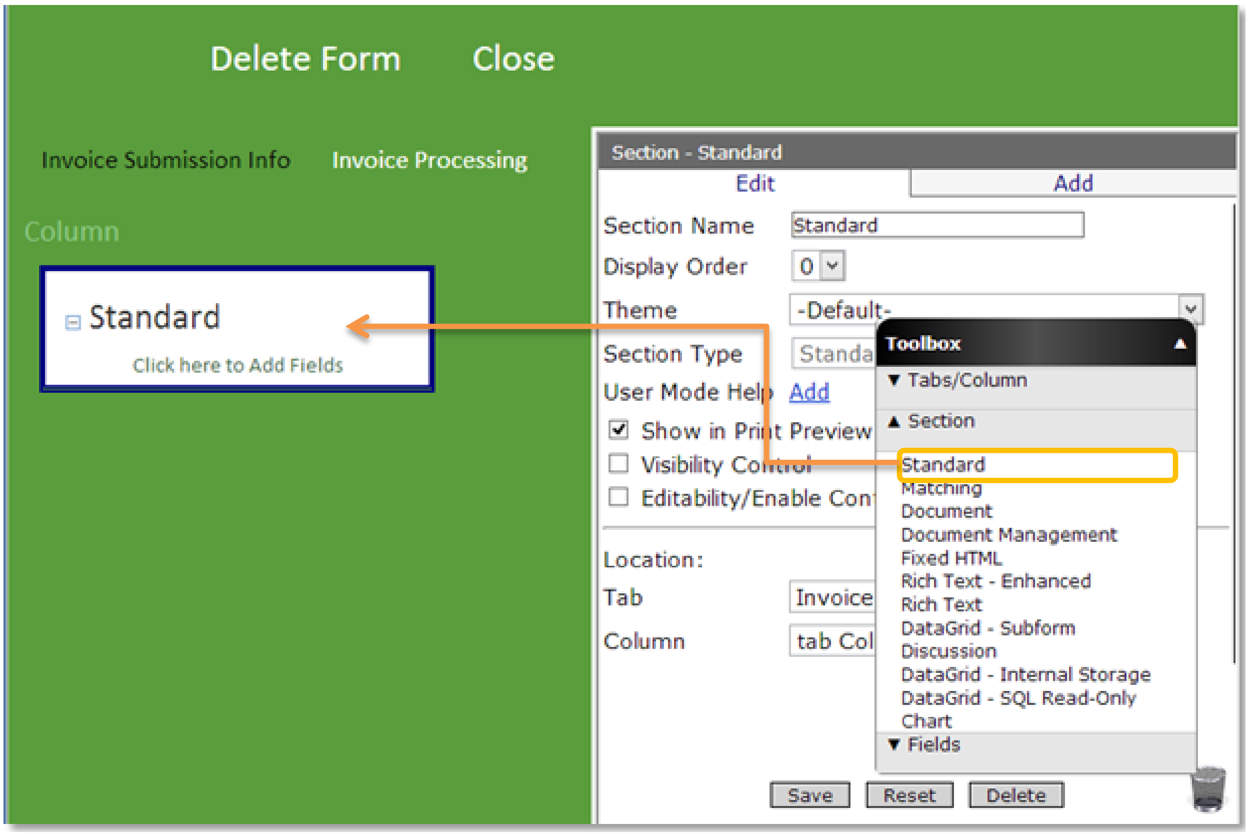
✓ Thus, only when the Invoice is reviewed by project manager will the Invoice Processing tab be visible.

❖ Rename the Tab Column On to Column



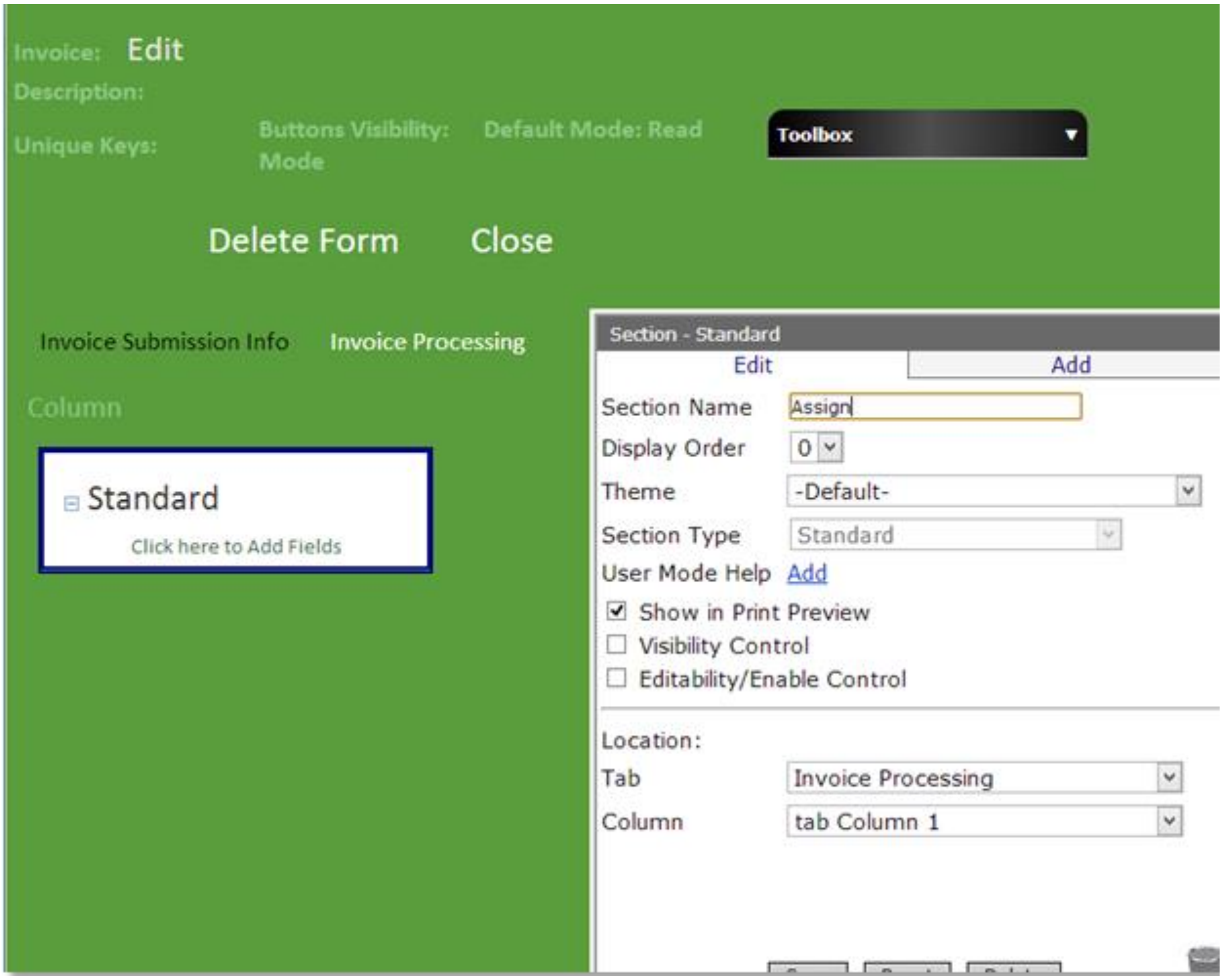
1. Click on Tab Column 1
2. In the Properties Box click in Column Name and type Column.
3. Click Save.

❖ Create a New Section Named Assign



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

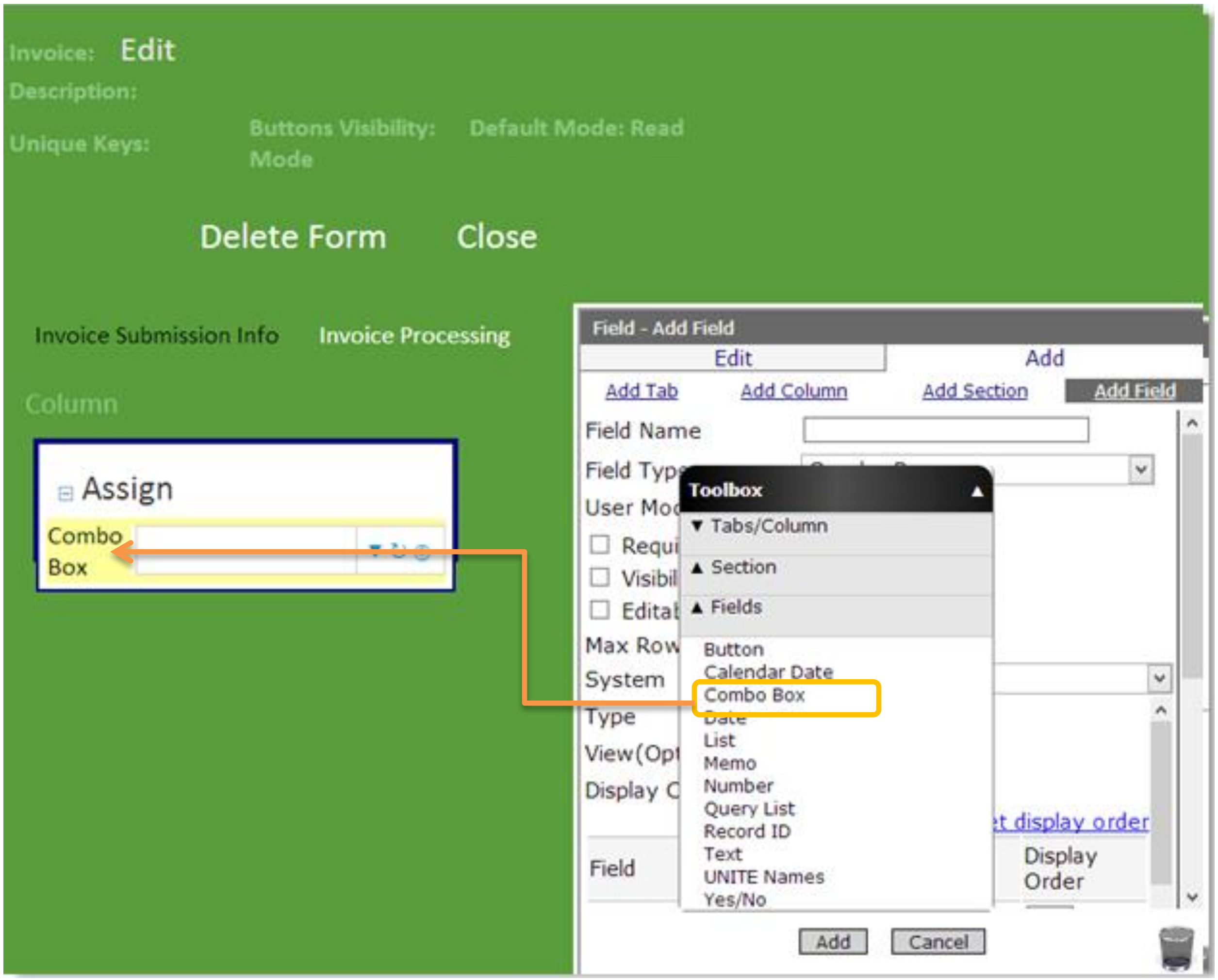
❖ Name the Section



1. Click in Section Name and type Assign

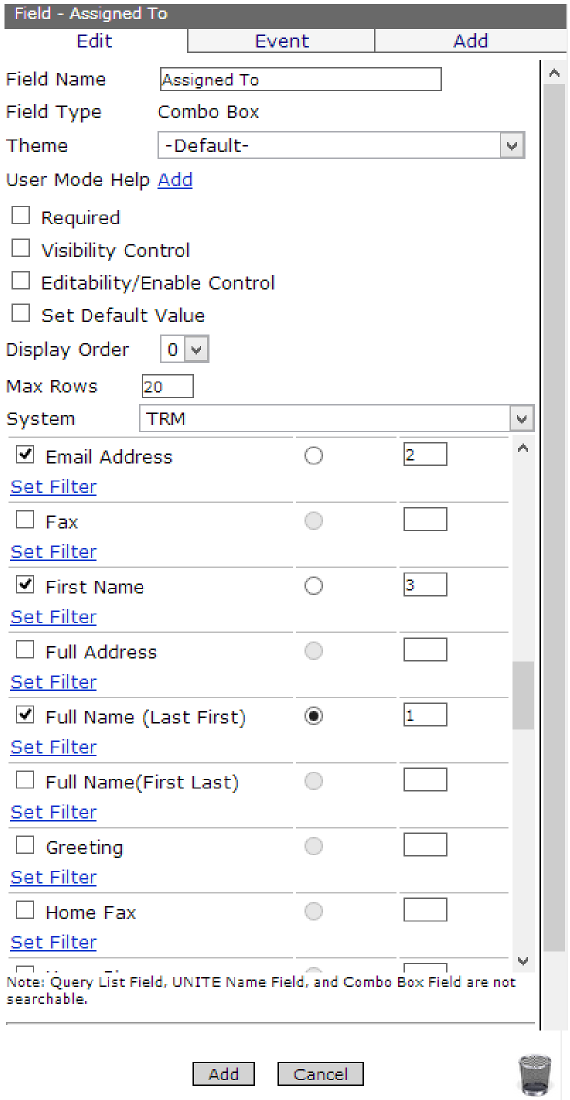
2. Click Save.

❖ Create A Combo Box Named Assigned to



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

❖ Name the Combo Box.

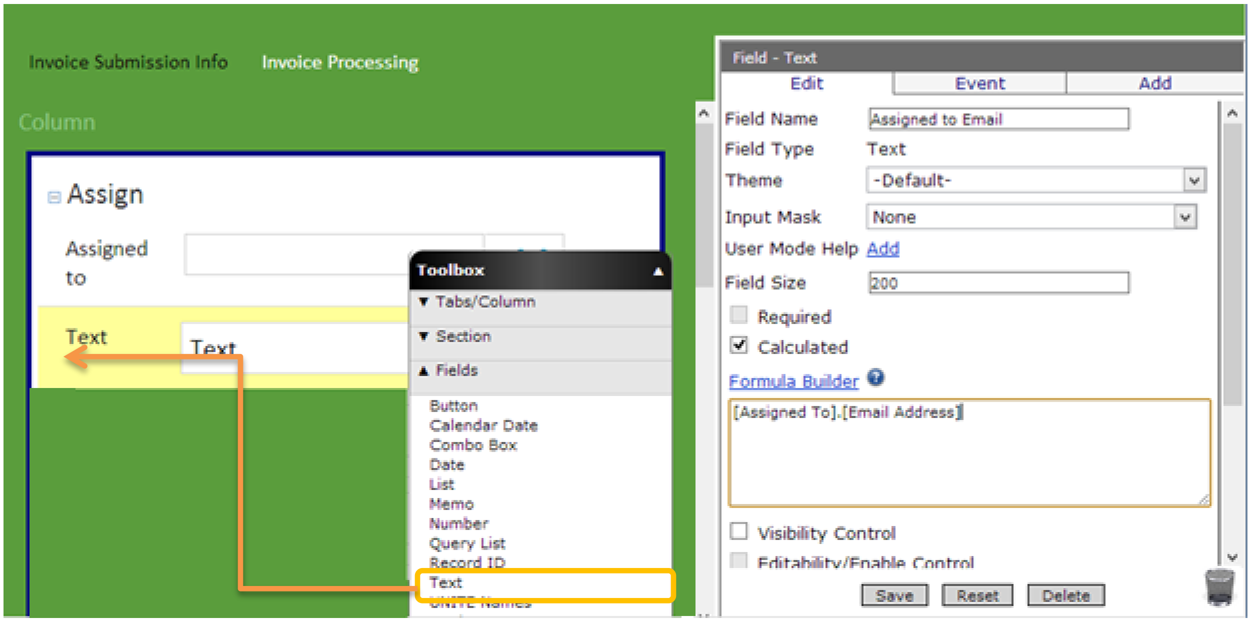


1. Name this field Assigned To

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.

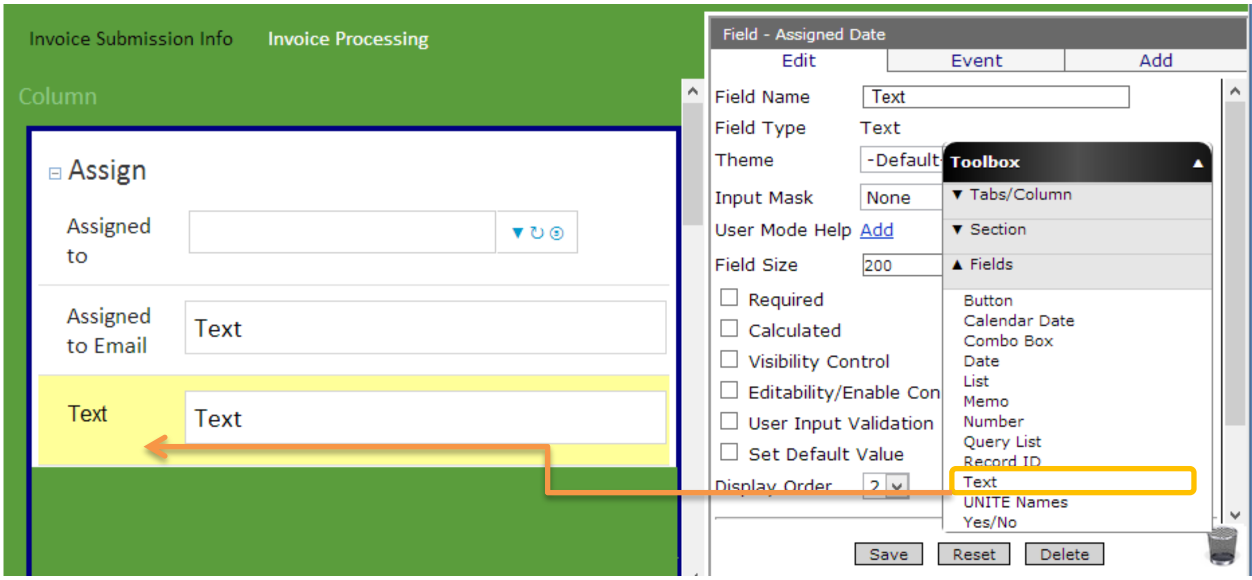
2. Select "TRM" from the System dropdown menu.
3. Select your company from the VE dropdown menu
4. Select "Contact" from the Object dropdown menu.
5. Set the Display Column to "Full Name (Last First)"
6. Select the fields Email, Full Name (Last First), First Name, Last Name, and Department.
7. Select 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

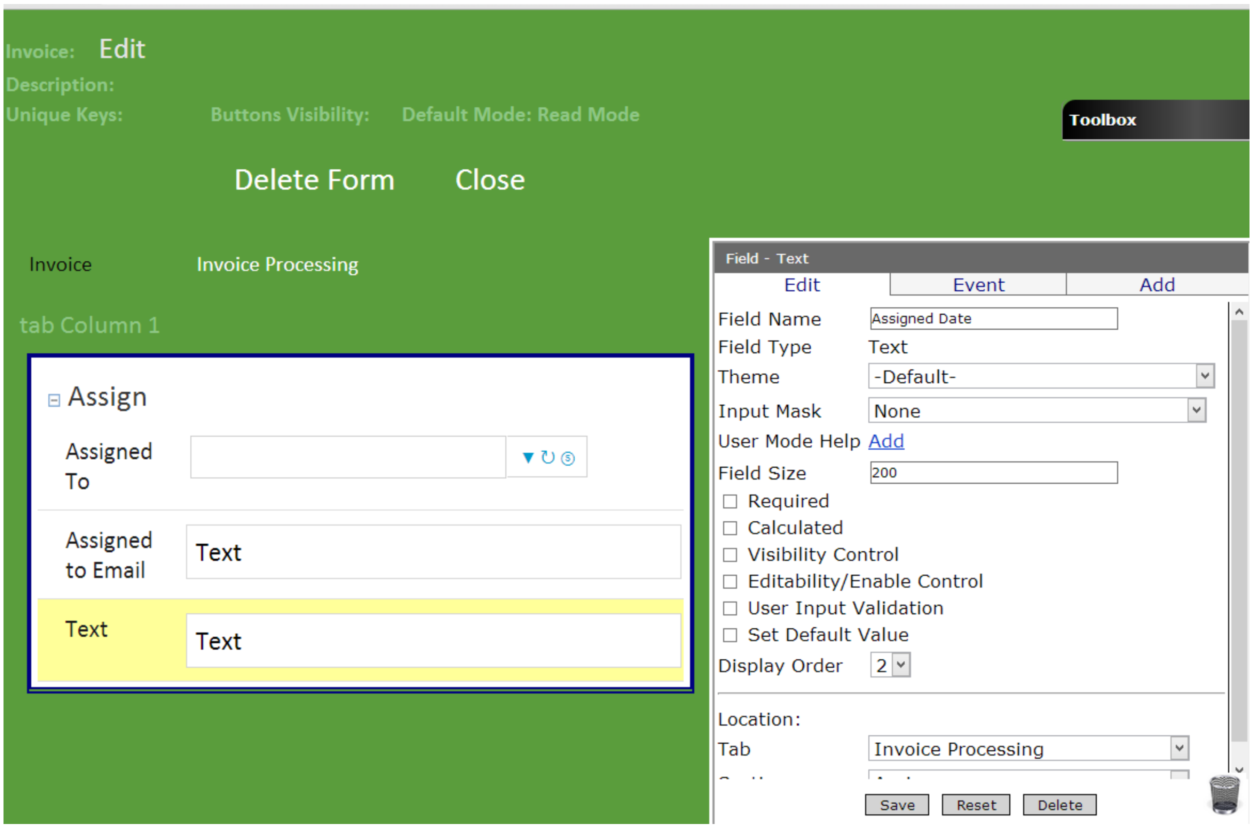
❖ Create a Text Field Named Assigned Date



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

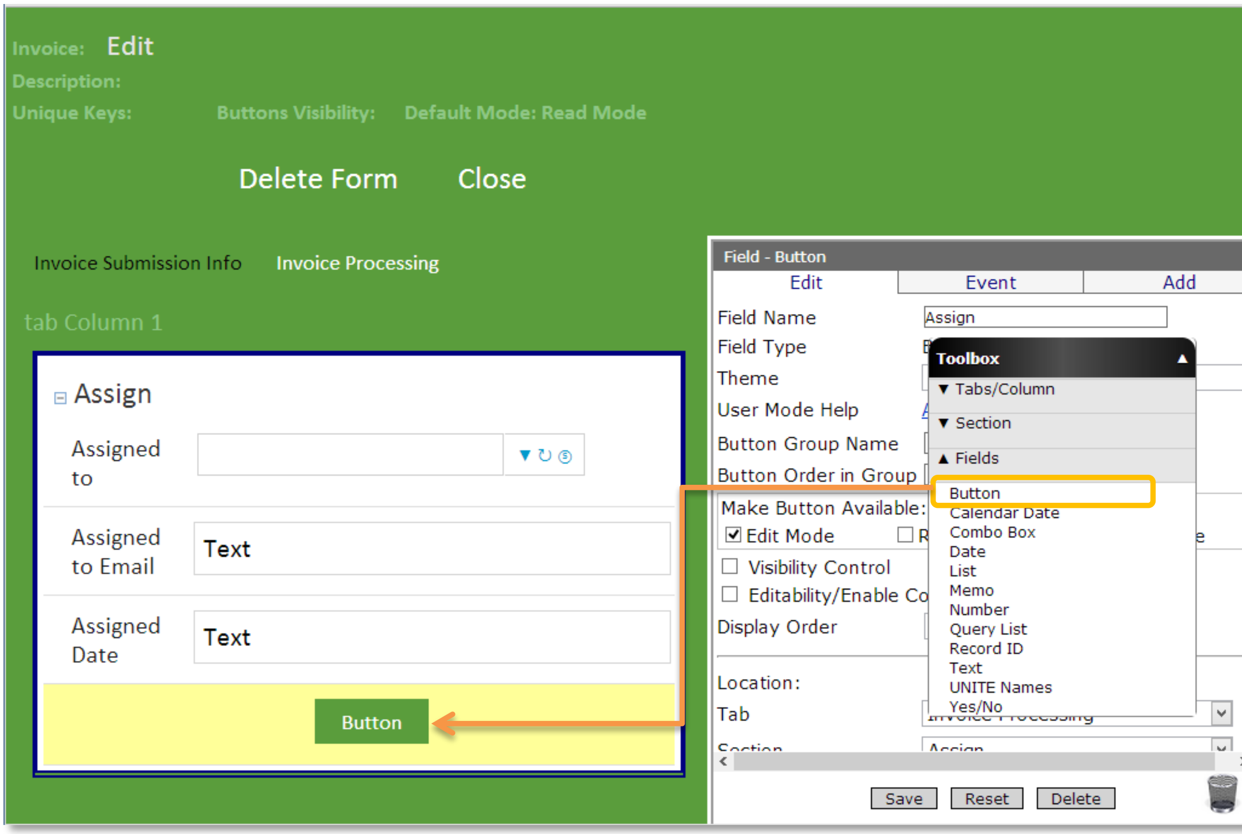
1. In the properties box click in Field Name and type Assigned Date
2. Click Save.

❖ Name the Text Field



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

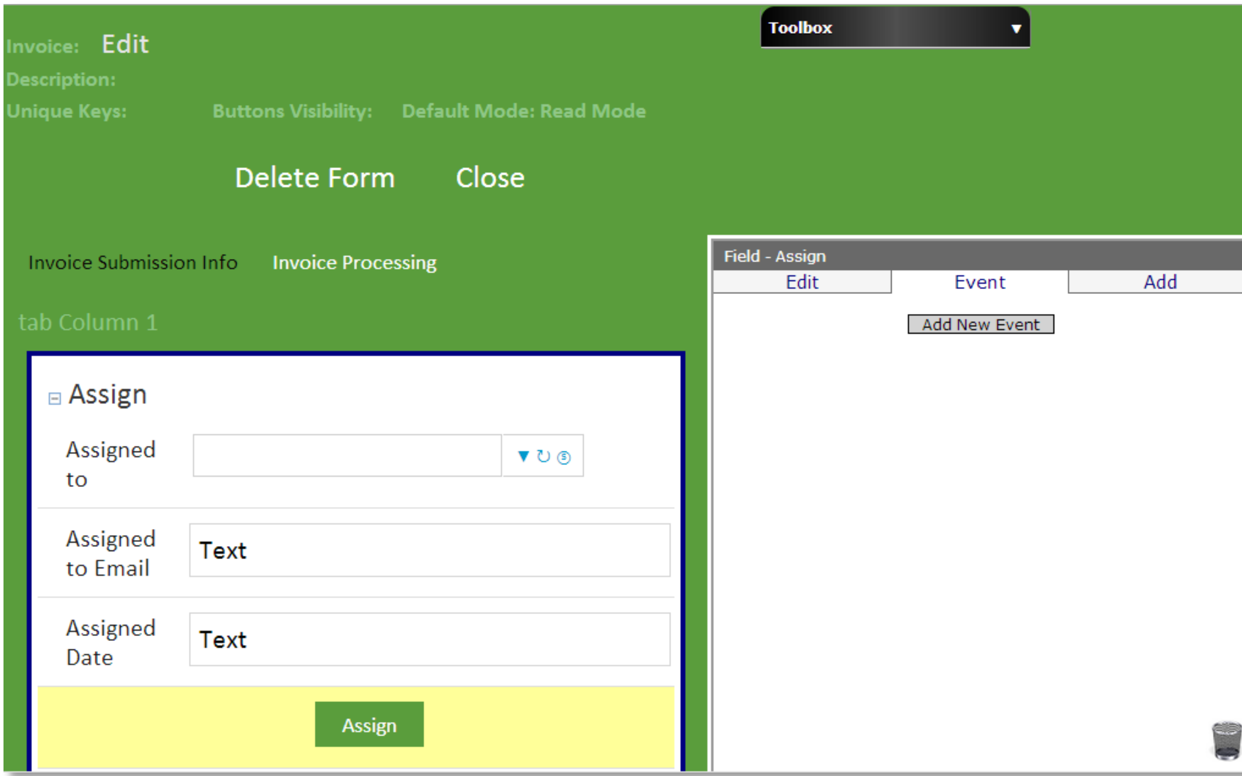
❖ Create Button Field Named Assign



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

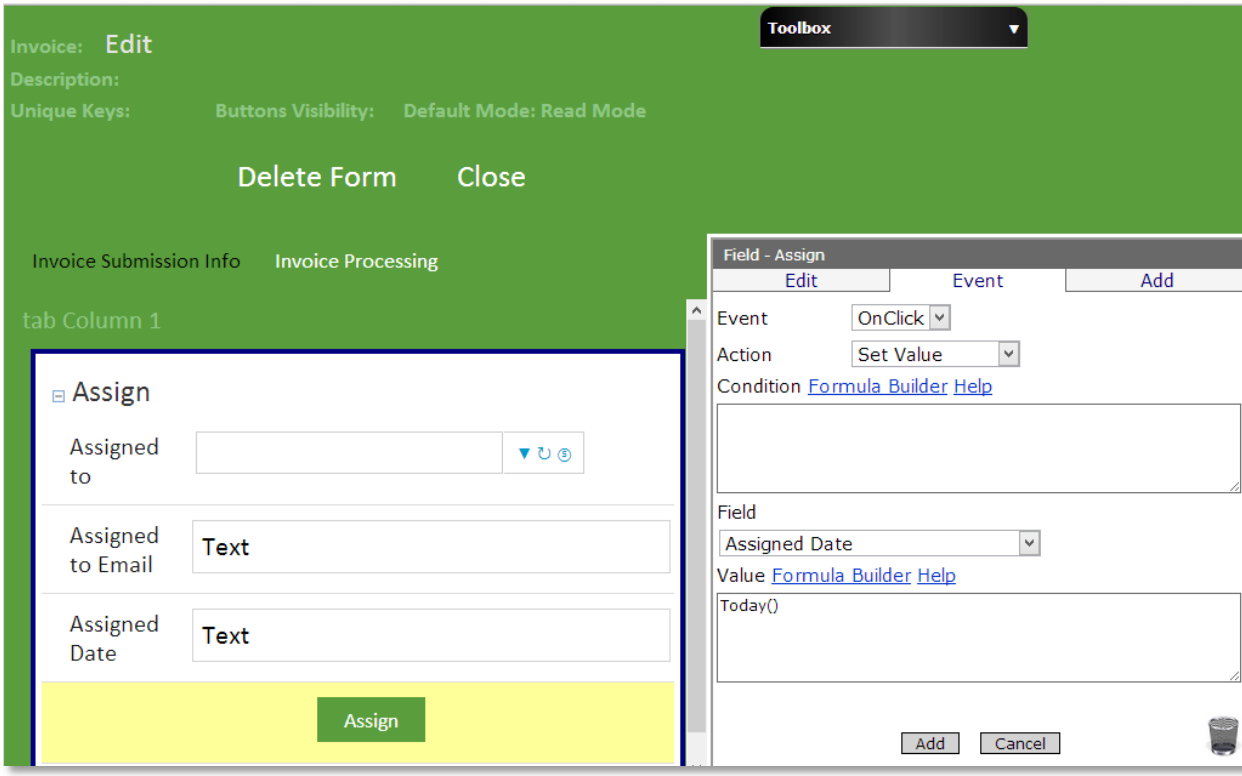
1. In the properties box click in Field Name and type Assign
2. Click Save.

❖ Name the Button Field.



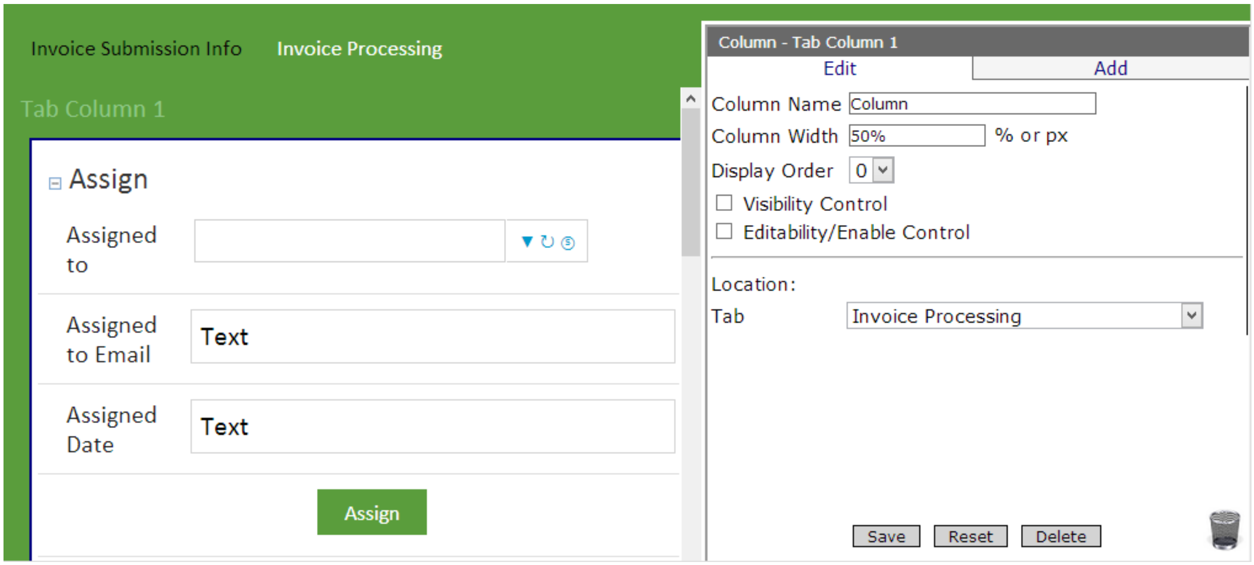
1. Click on the *Events*.
2. Click Add New Event.

❖ Making the button assign date



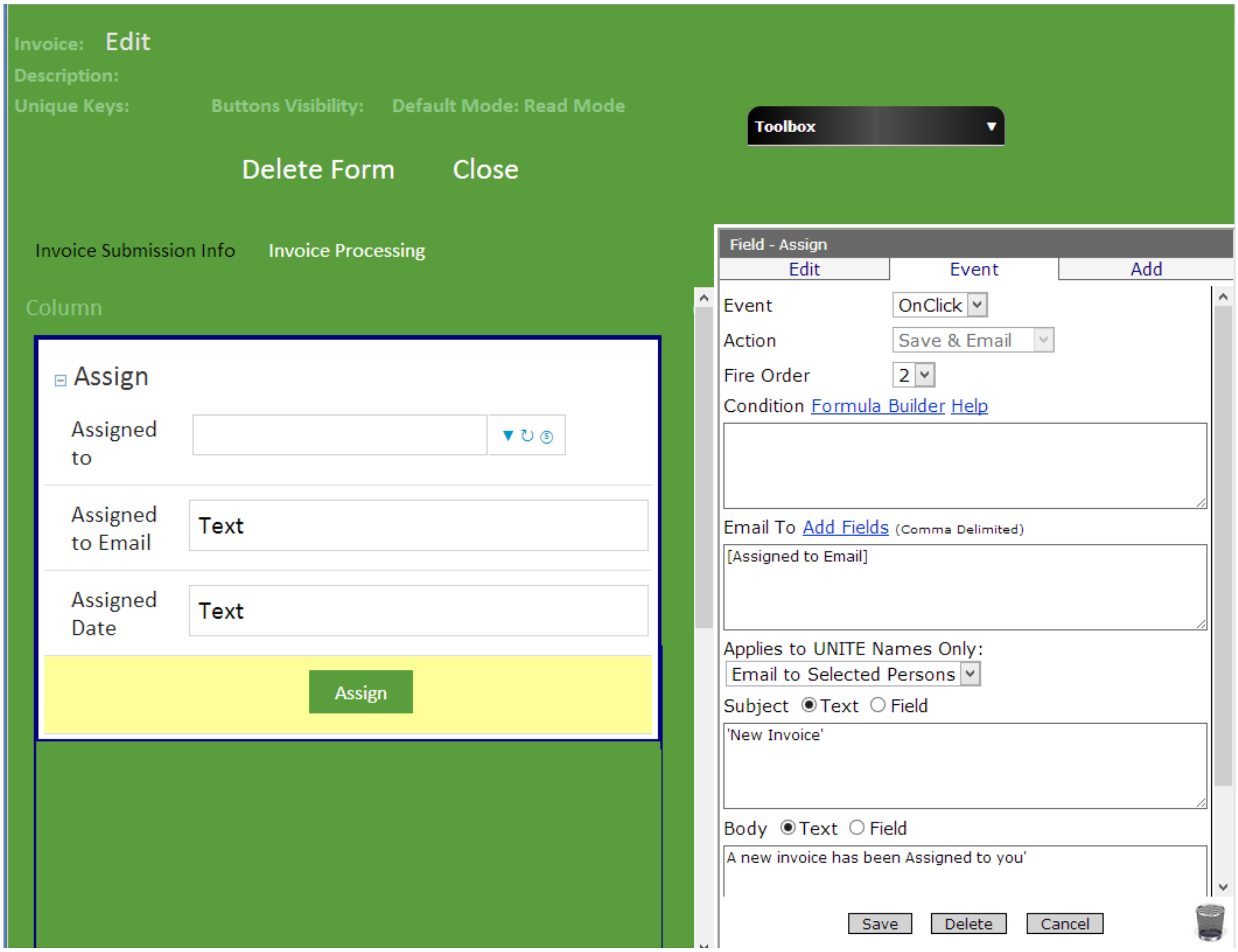
1. Select Set Value from the Action dropdown menu.
2. Select "Assigned Date" from the field dropdown menu.
3. Click Formula Builder next to the Value text box.
4. Enter the following formula: *Today()*
5. Click Add.
6. Click Save.

❖ Rename the Tab Column 1 into Column



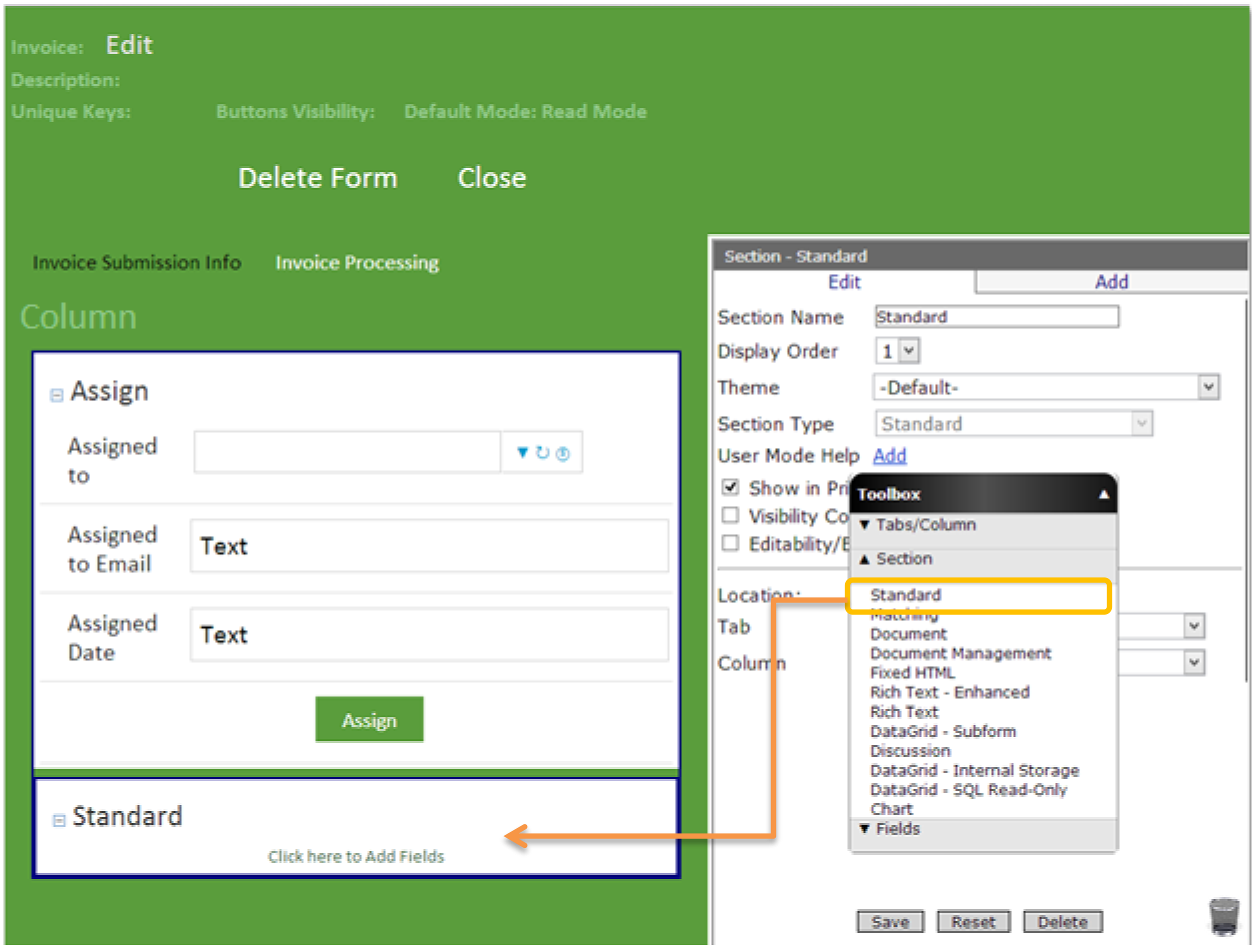
1. Click on the Tab Column 1
2. Click In the Column name in the properties Box
3. Click Save

❖ 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

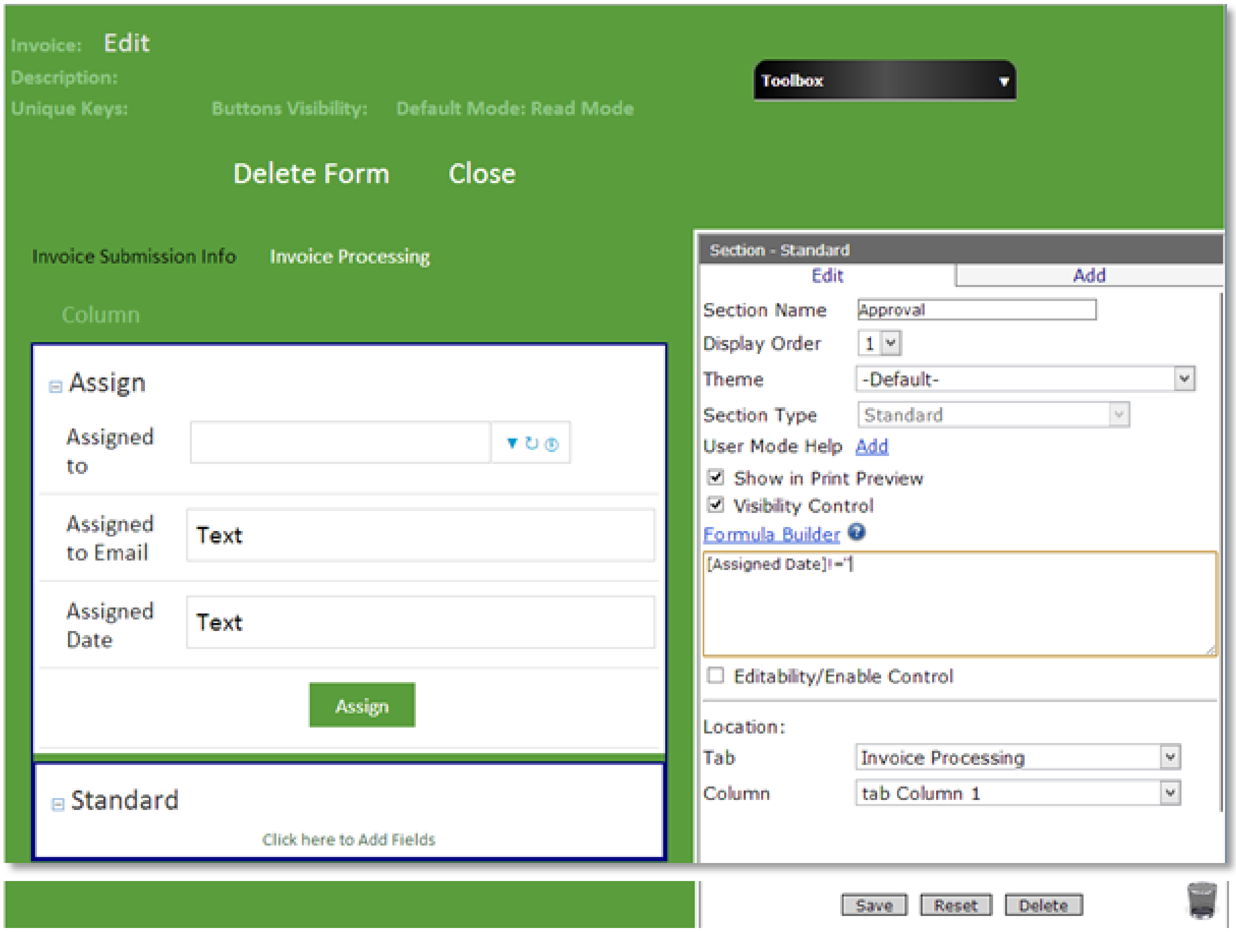


Approval Section

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.

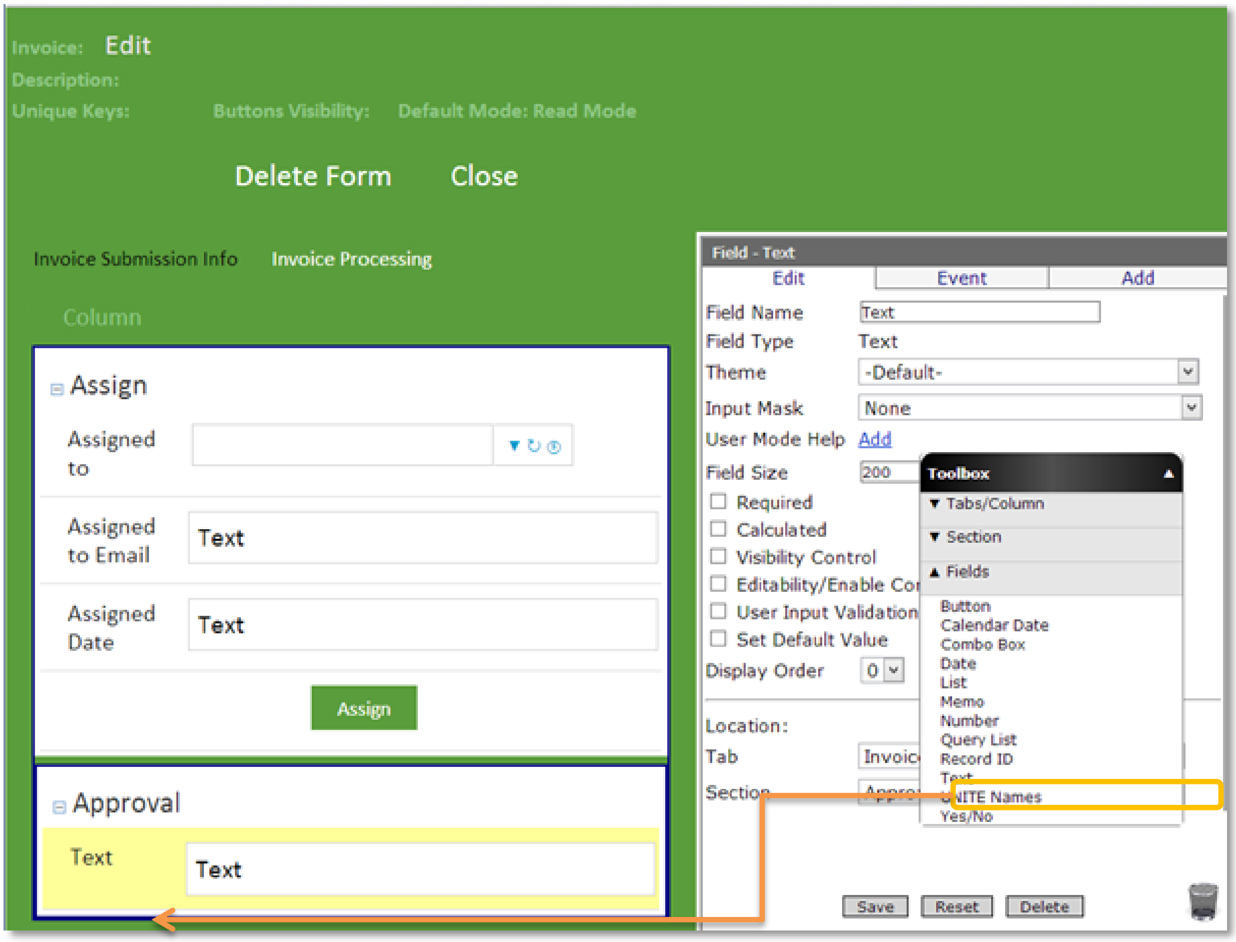
✓ Drag and drop a Standard section into the form.

❖ Name the new Section



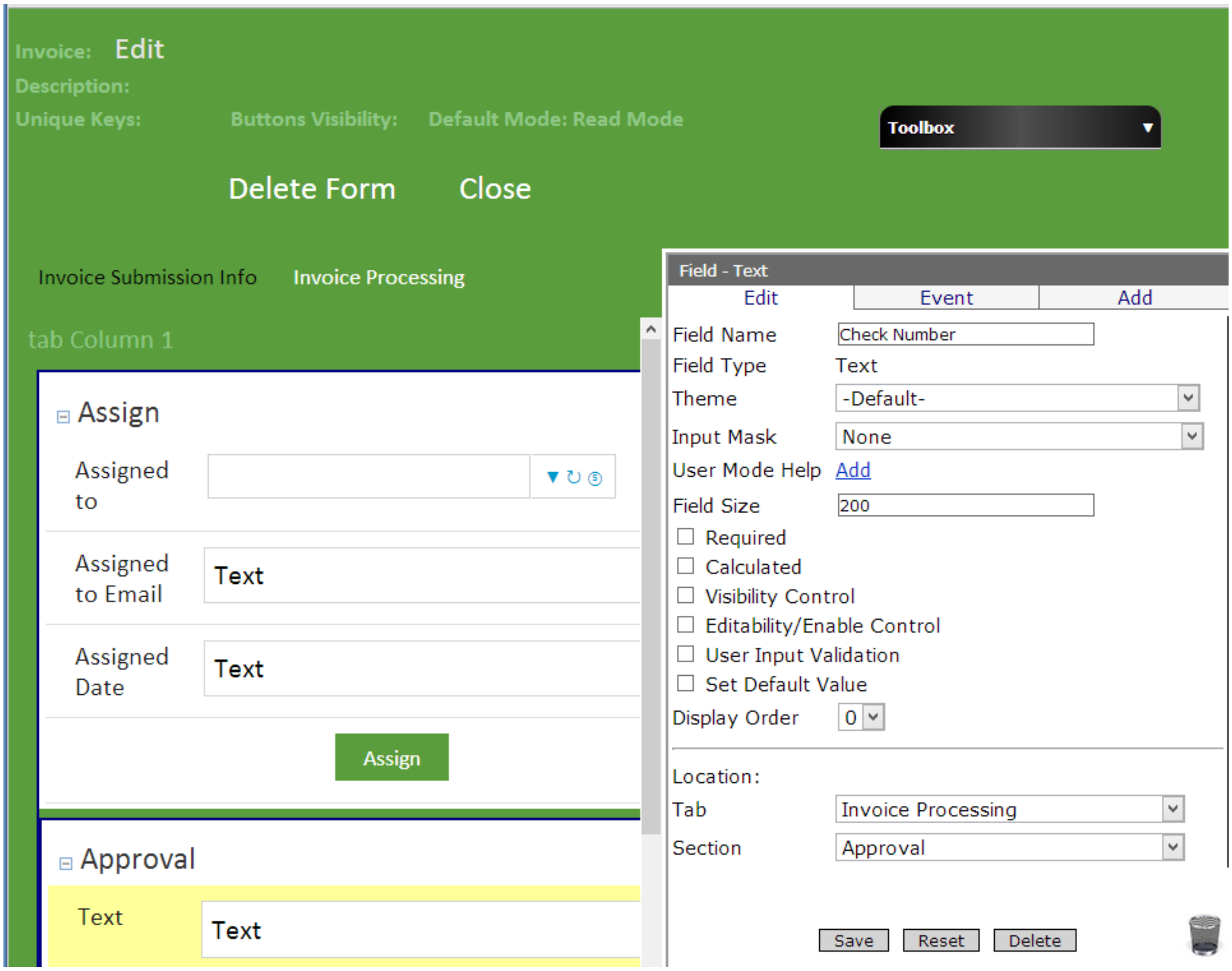
1. In the properties box click on *Section Name* and type *Approval*
2. Since we only want this section to be used after the invoice has been assigned to an accountant we will make it visible only after the assign fields have been entered.
3. Check Visibility Control
4. Click Formula Builder and enter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

❖ Create a Text Field Named Check Number



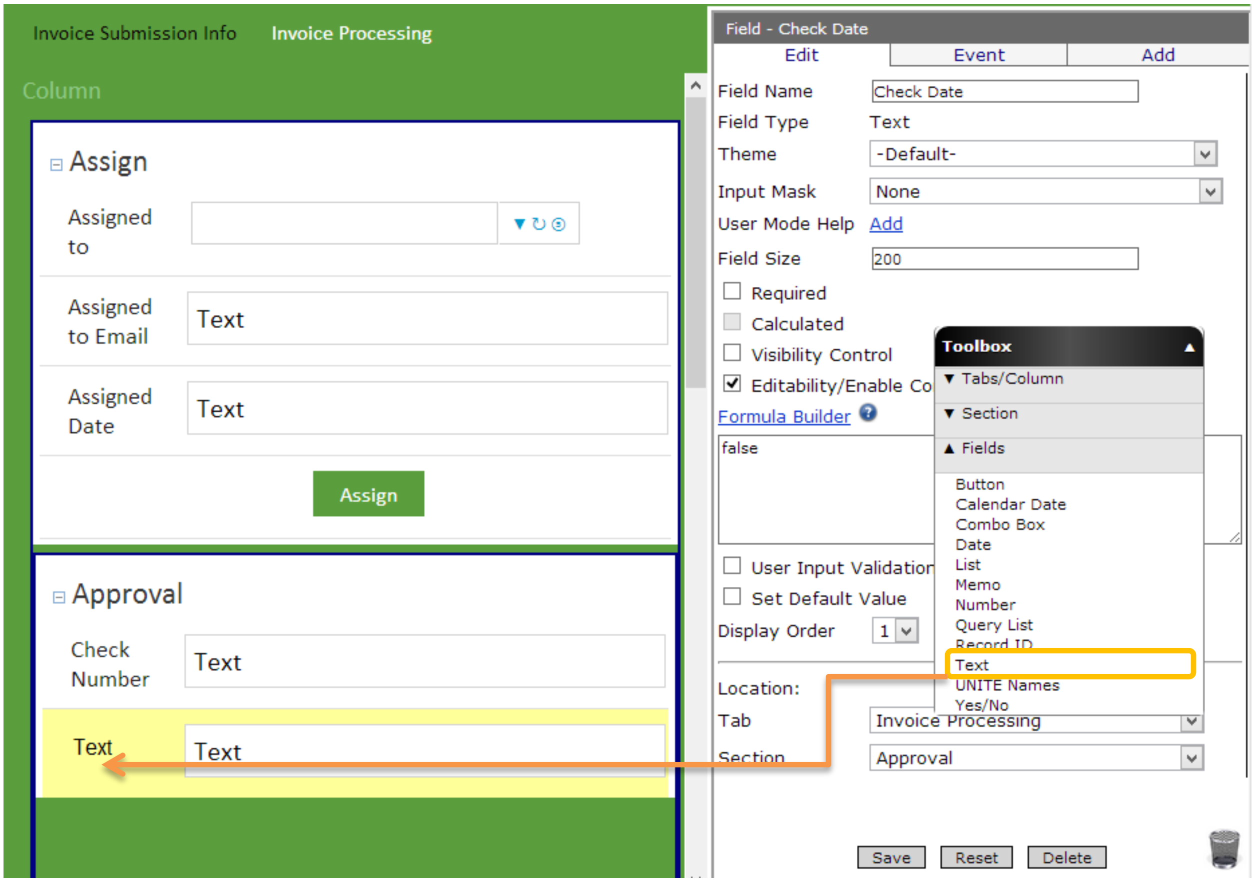
✓ Drag and drop a text field from the toolbox into the Approval section.

❖ Name and The text Field.



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

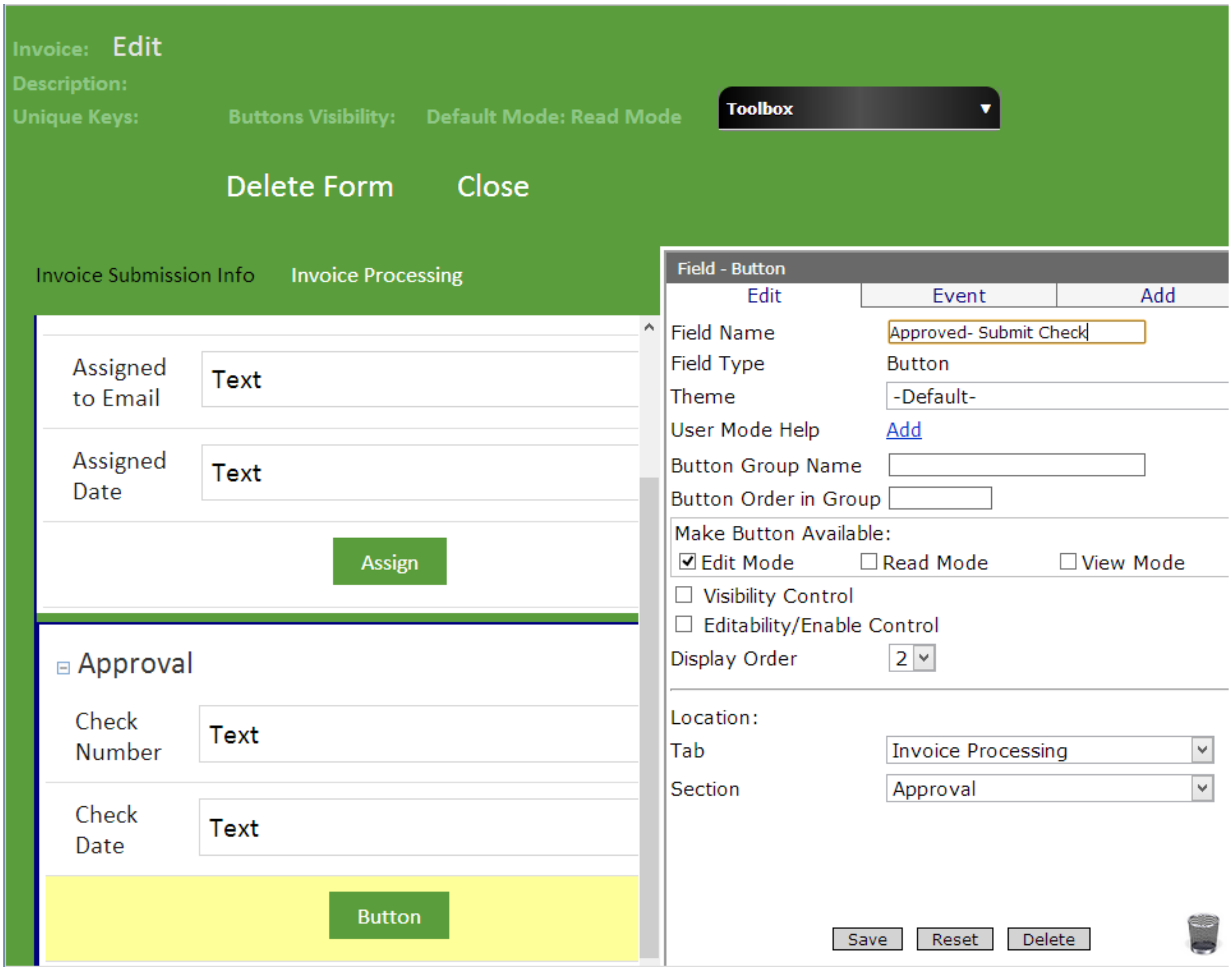
❖ Create a Text Field Named Check Date



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

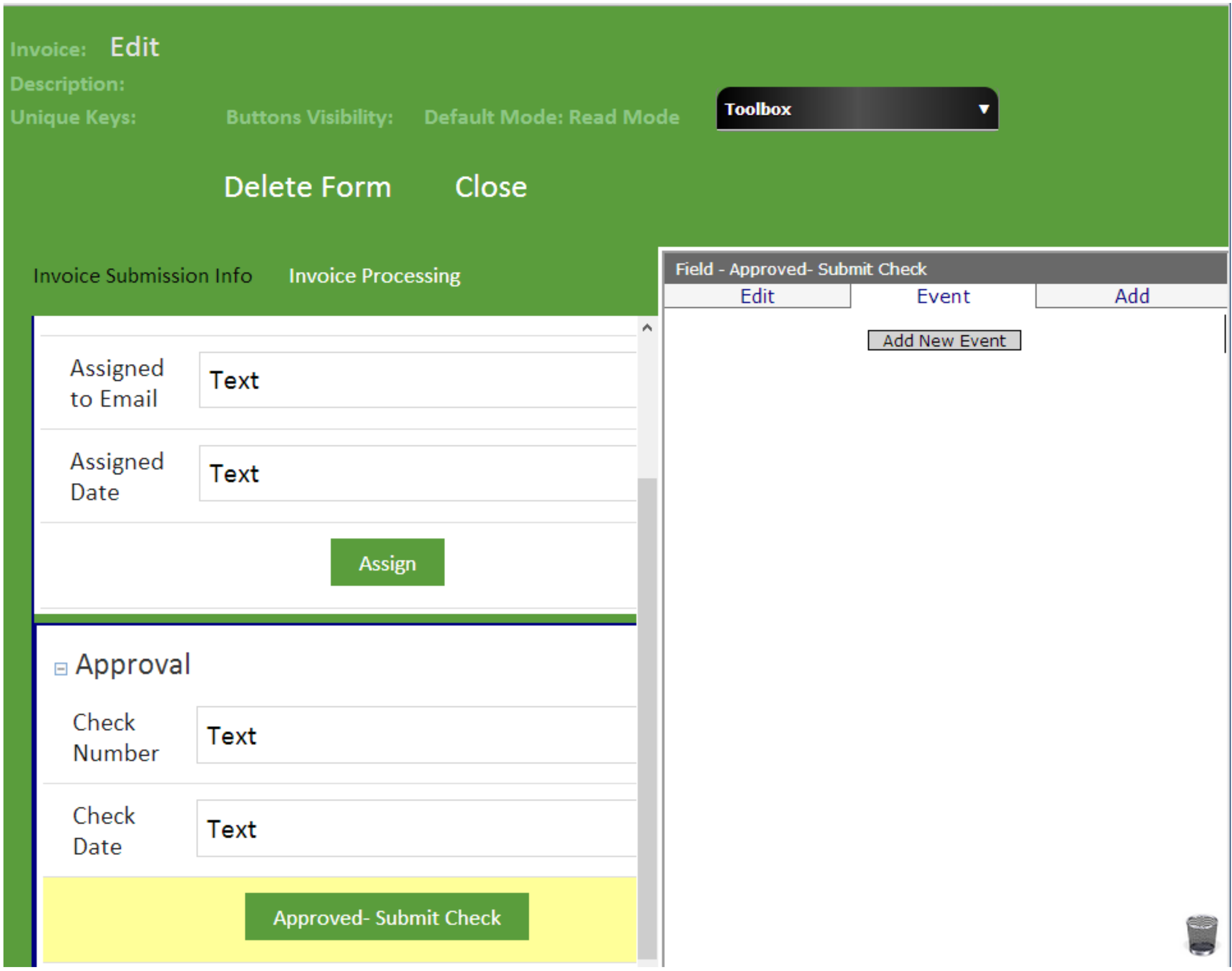
1. Name the text field
2. In the properties box click in Field Name and type *Check Date*
3. Check Editability/Enable Control and make sure the formula box shows ***false***
4. Click Save.

❖ Create A Button Named Approved-Submit Check

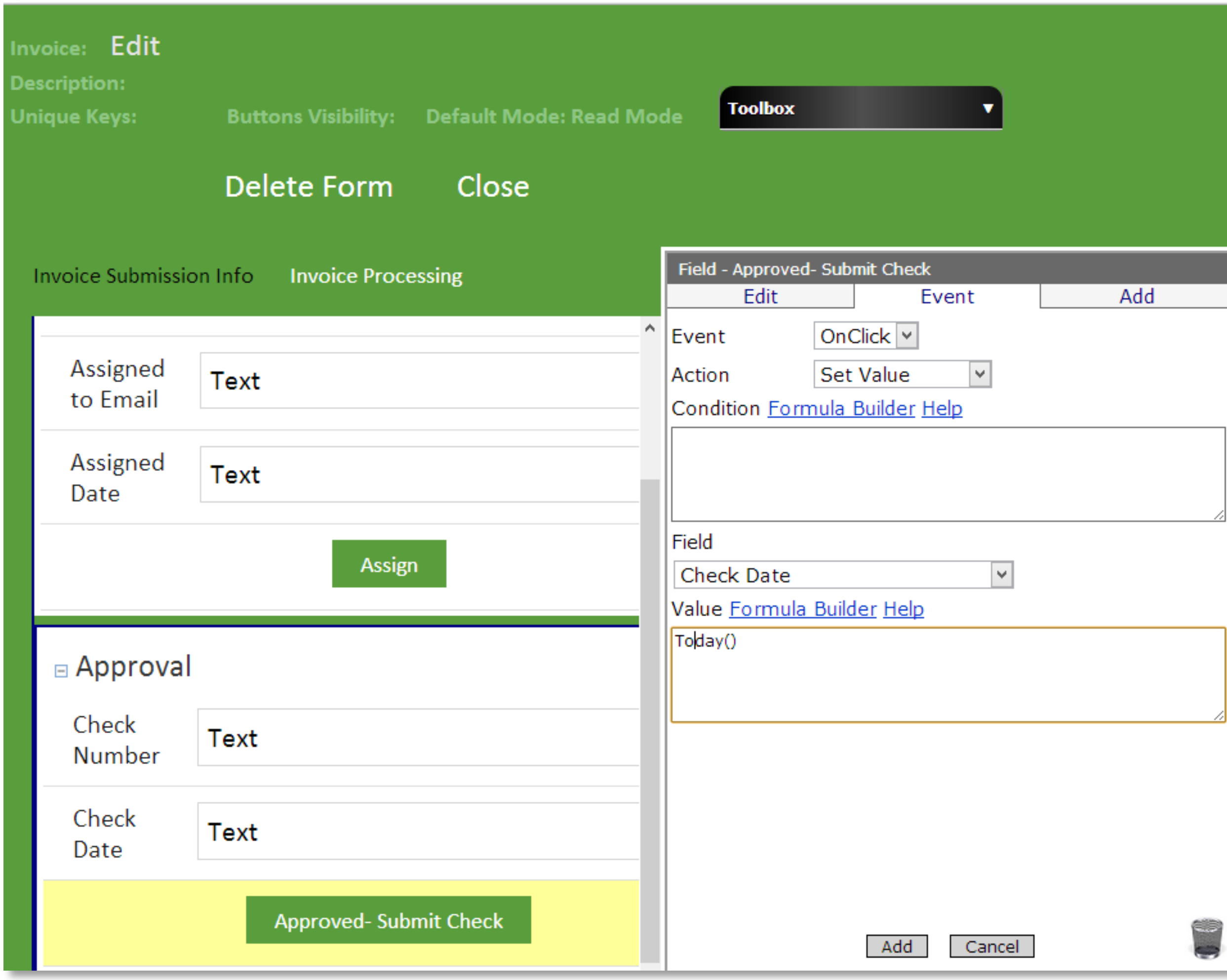


1. Drag and drop a Button field from the Toolbox into the Approval section.
2. Name this Button Approved – Submit Check

❖ Creating the button Approved – Submit Check

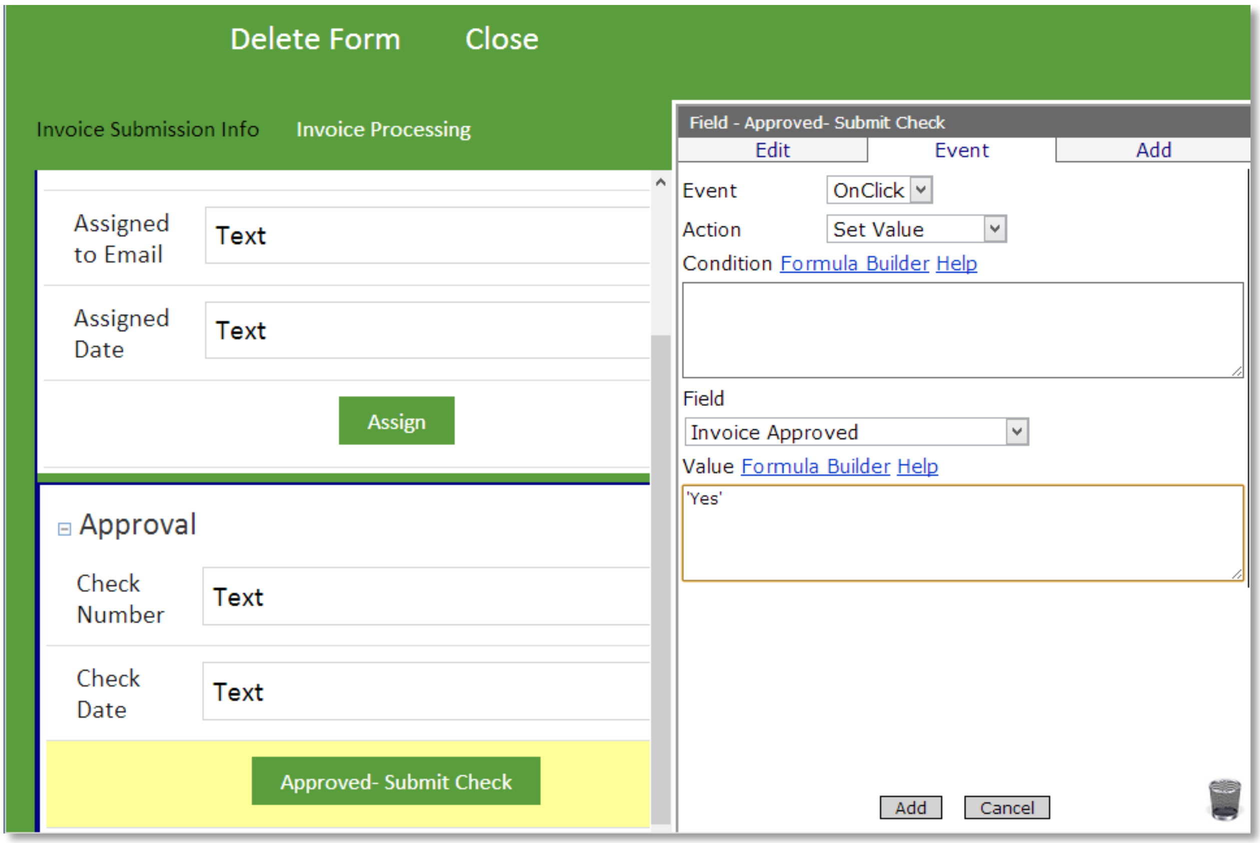


1. Click Add New Event.



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***



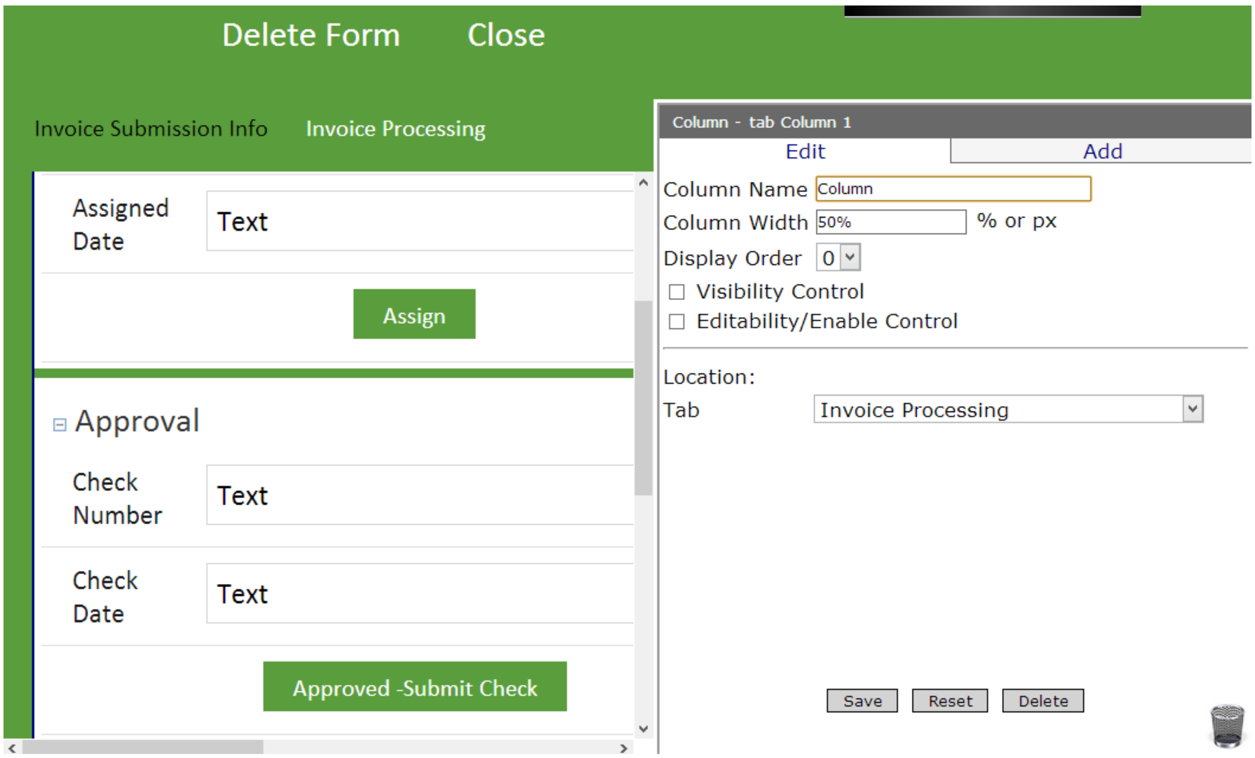
1. In the **Action** choose set Value From the Drop Down List
2. In the **Field** Choose Invoice Approved
3. In the Value Formula box type

   '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.

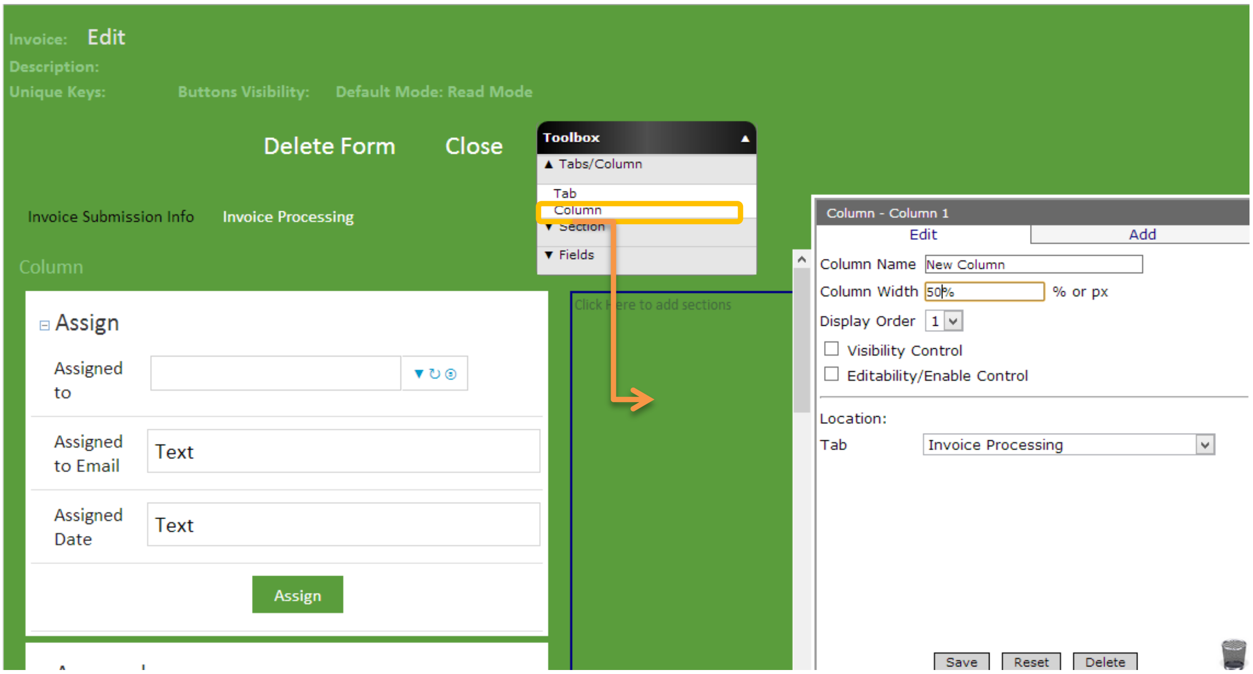
- ✓ Since this button will deal with a few different forms, we will return to it after constructing other sections.

- Change column width



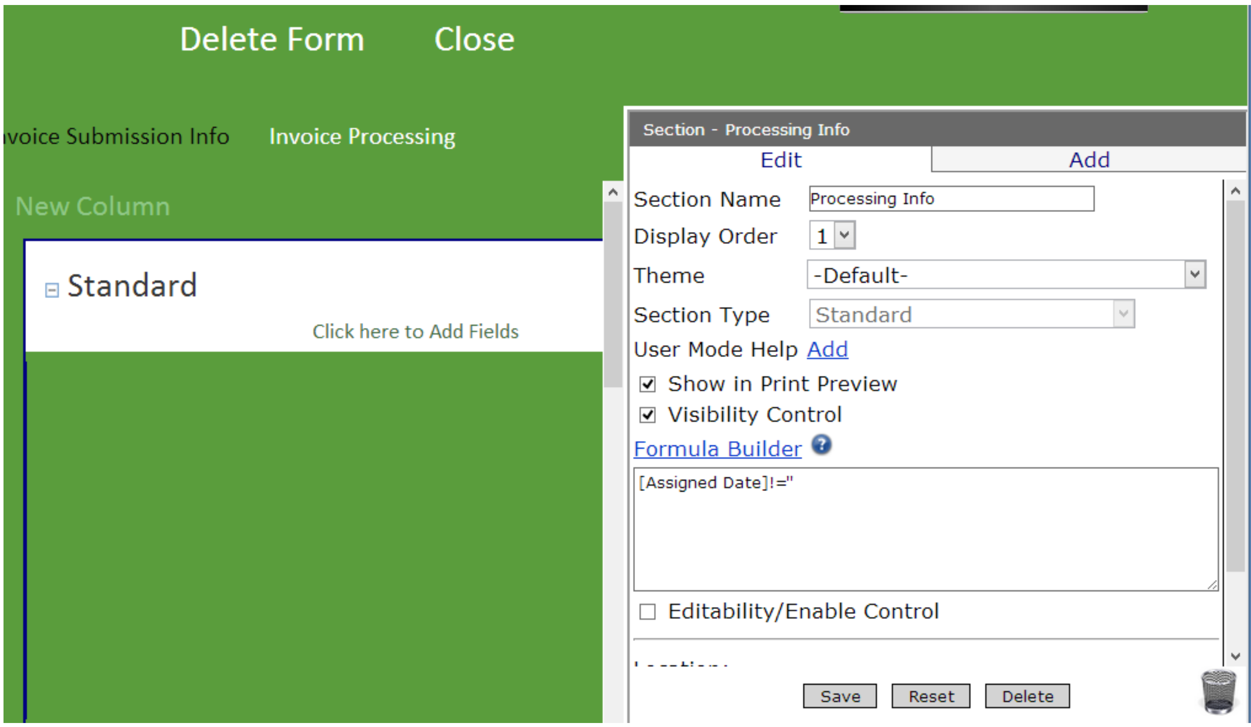
1. In the Properties Box Click on Column Name and type Column
2. In the Column width type 50%
3. Click Save

❖ Create New Column Named New Column



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

❖ Name the new column Processing Info



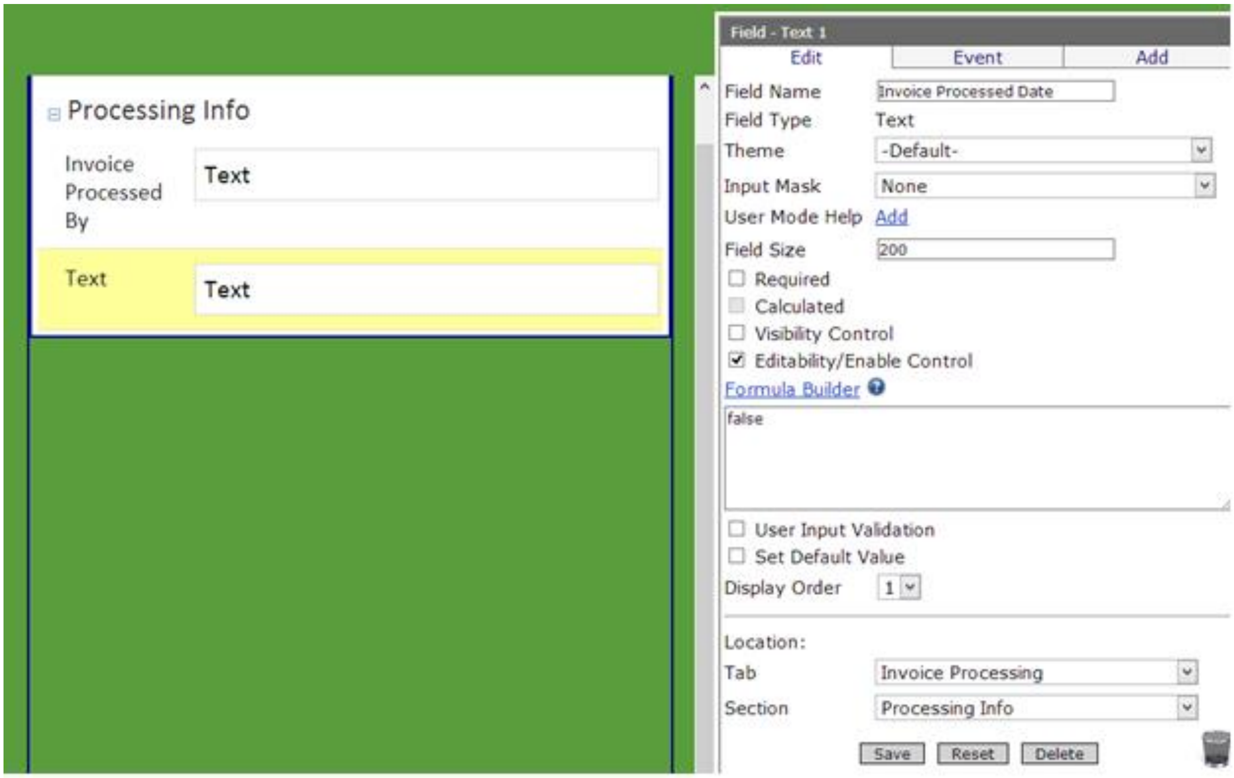
1) In the Properties Box click on Section Name and type *Processing Info.*

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



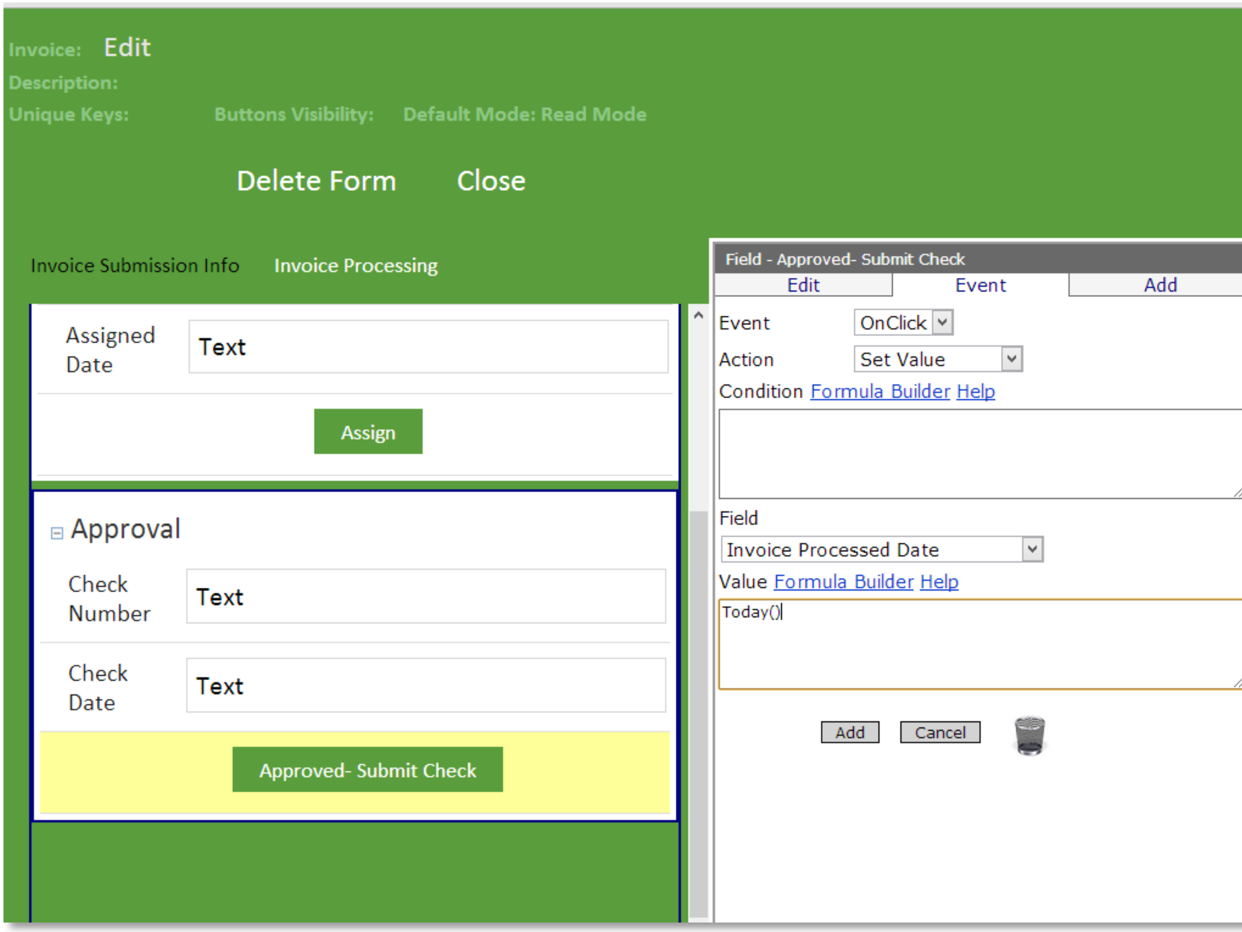
✓ Drag and drop a Text field from the Toolbox into the Processing Info Section

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

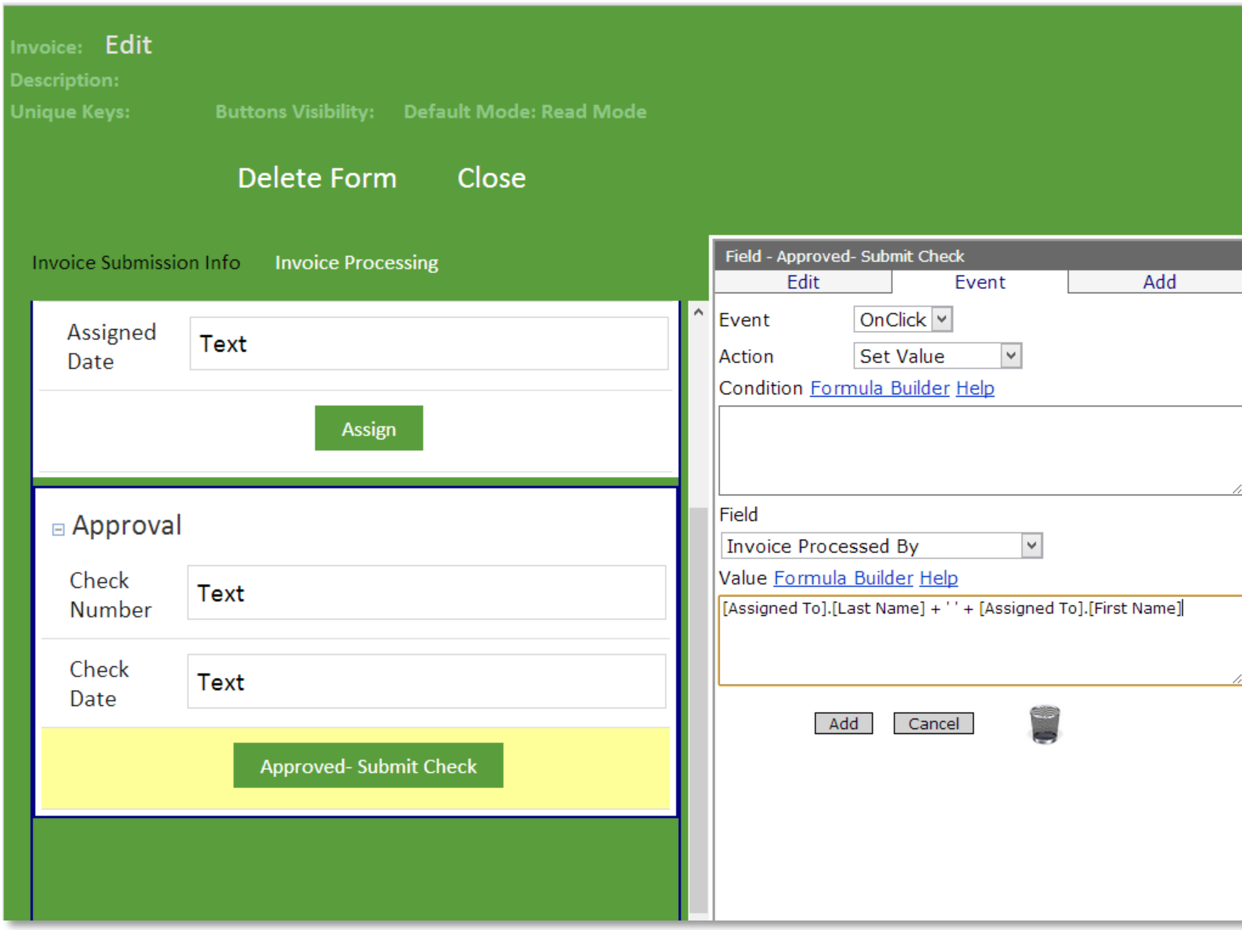
✓ Drag and drop a Text field from the Toolbox into the Processing Info Section

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



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.



1. Click *Add New Event*

2. Select ***Set Value*** from the **Action** dropdown menu

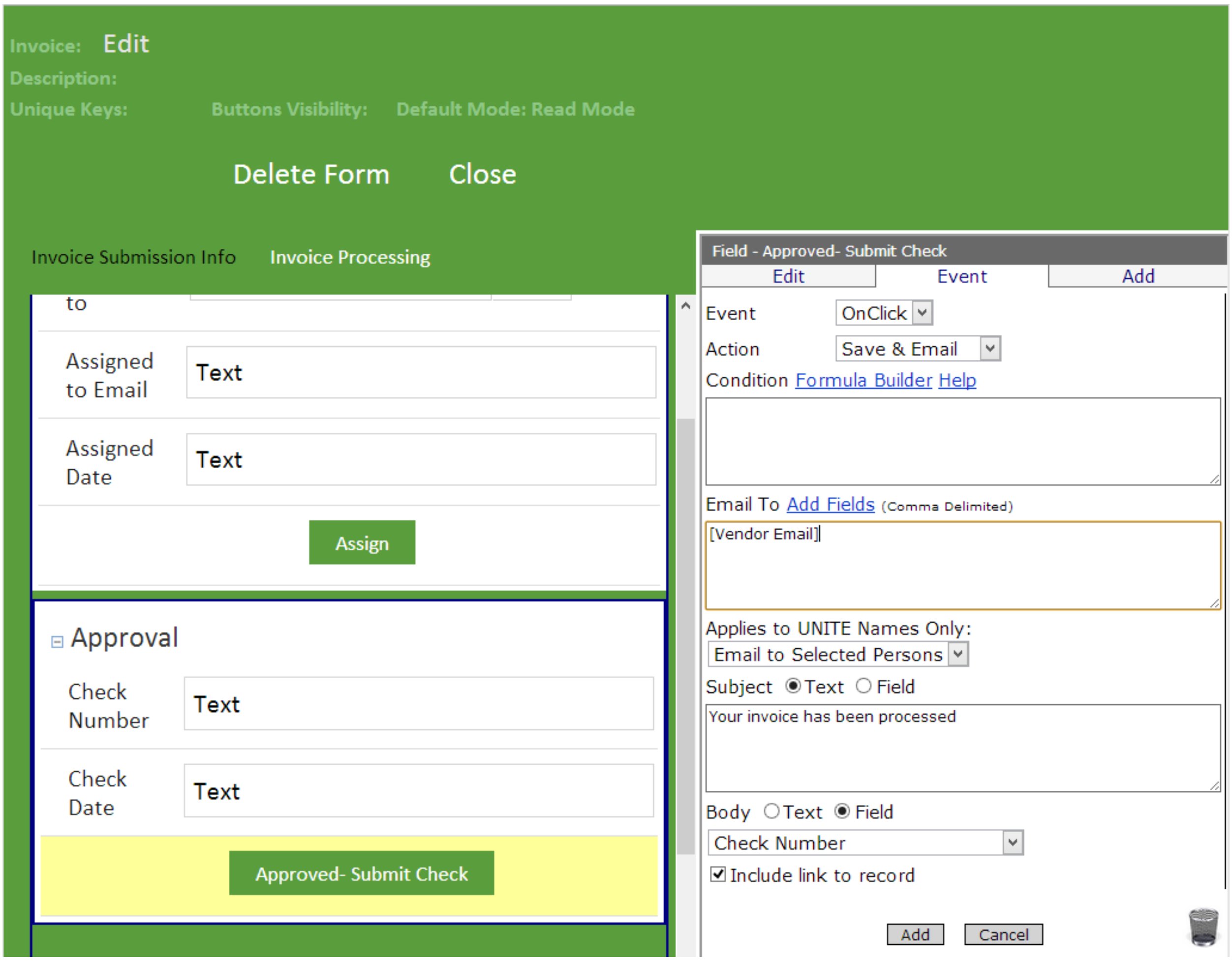
3. Select ***Invoice Processed By*** from the Field dropdown menu

4. Click Formula Builder next to the Value text box and enter the following formula:

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

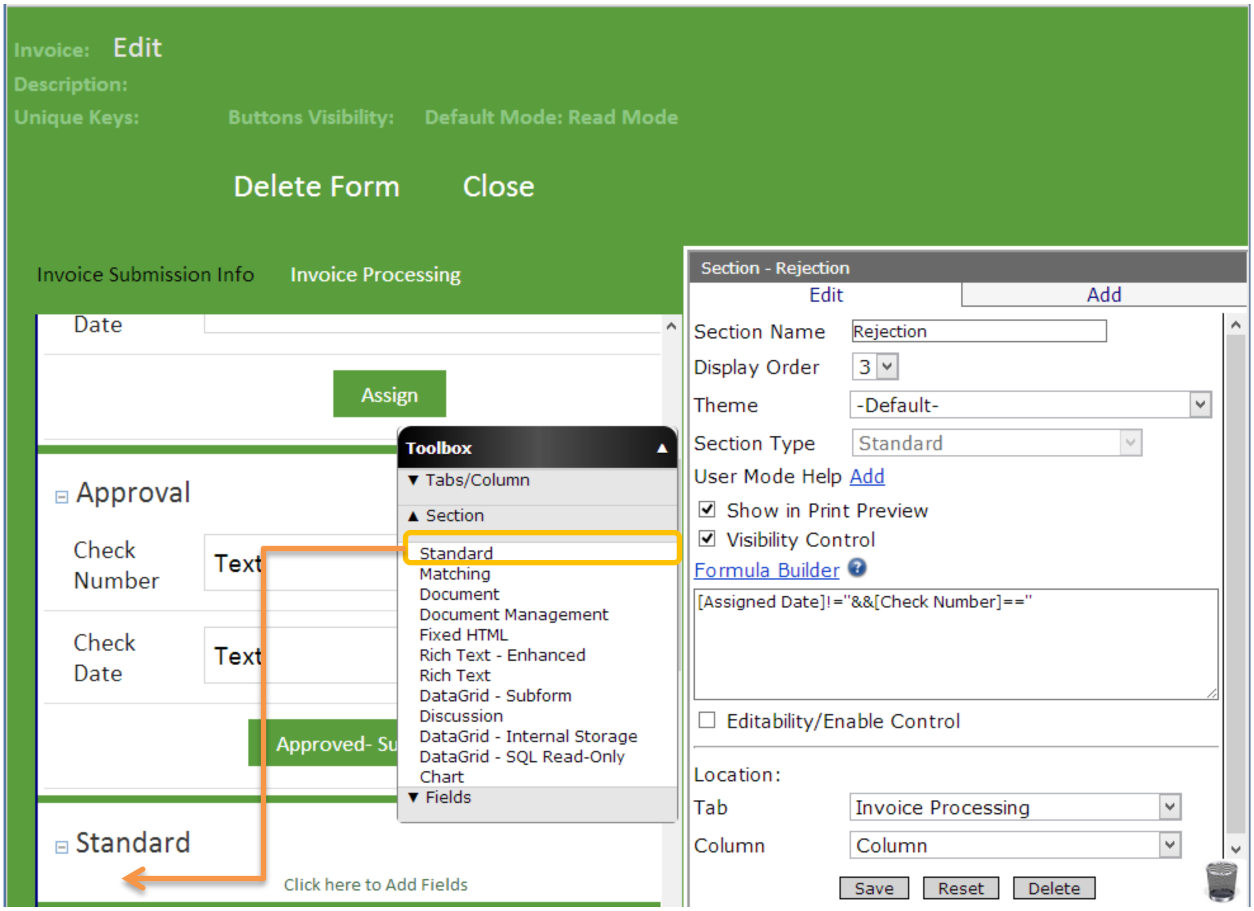
5. Click **OK.**

6. Click **Save.**



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.

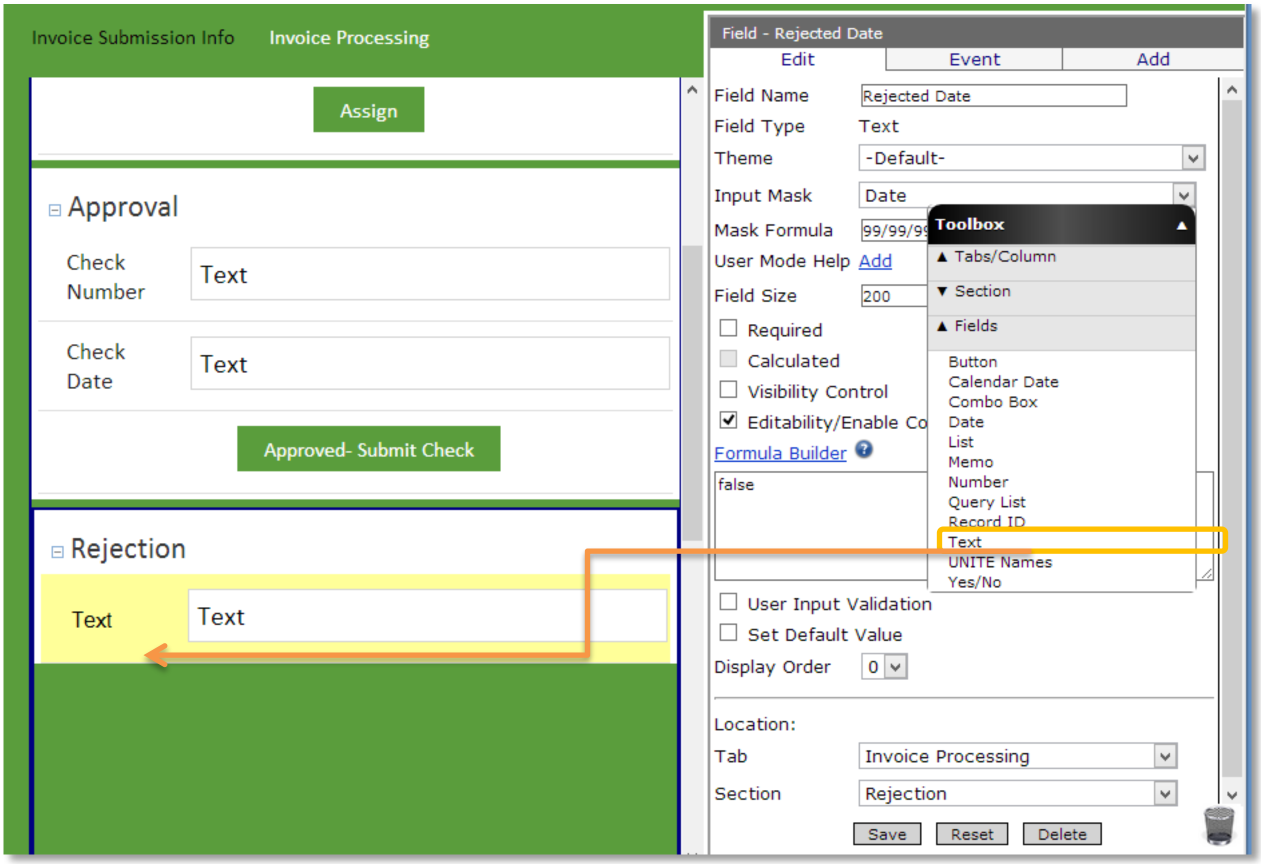
❖ Create a Standard Section named Rejection



✓ 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.

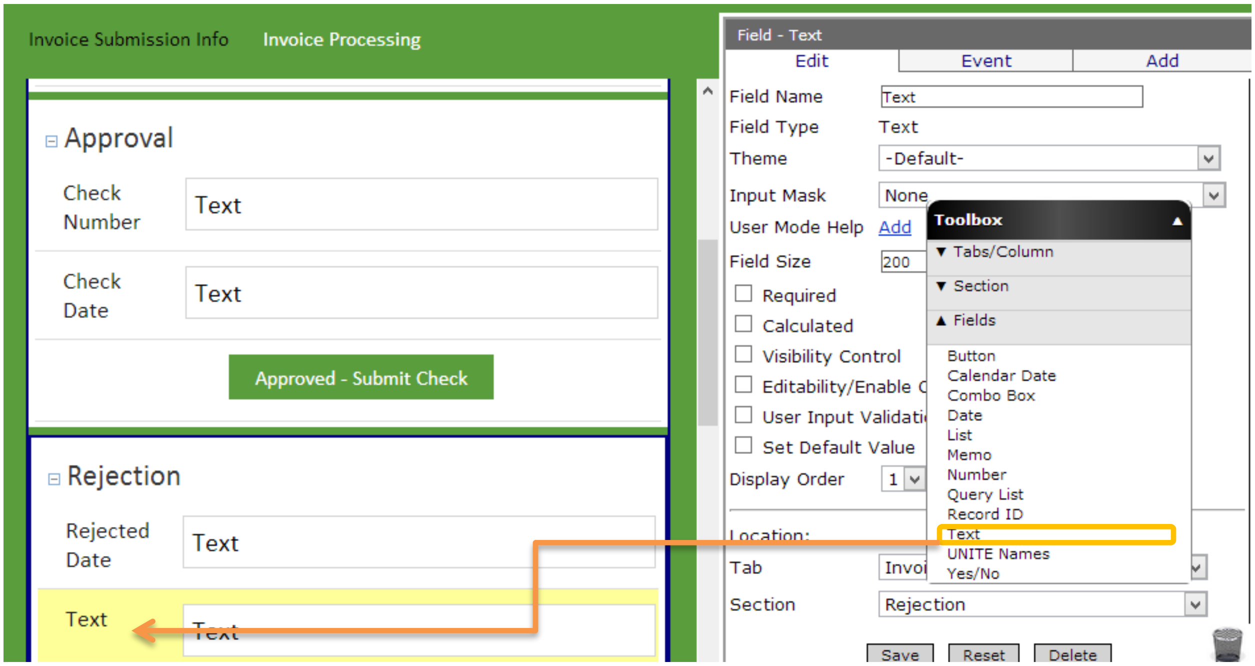
❖ Create text field named Rejected Date



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

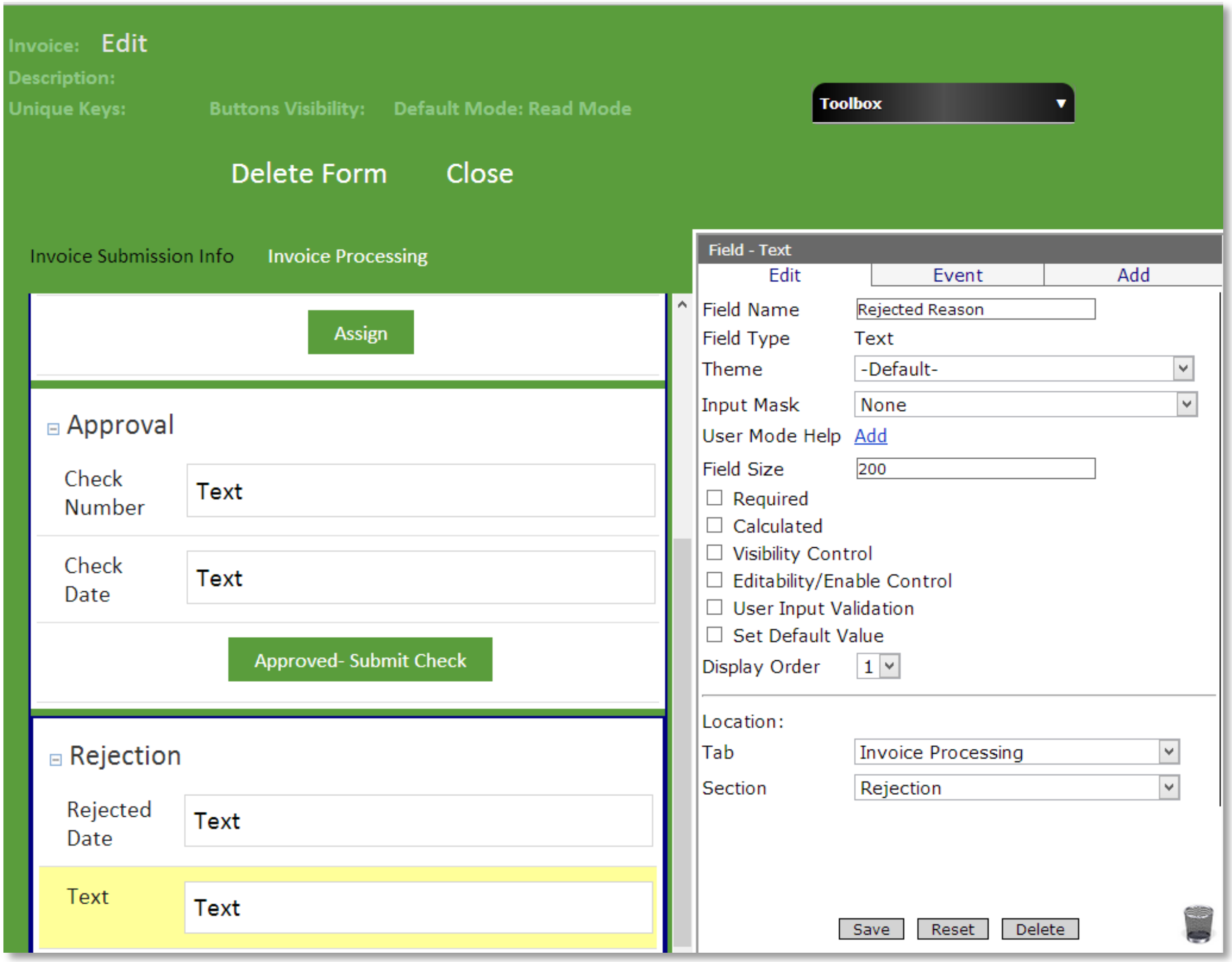
1. In the Properties Box click in Field Name and type Rejected Date in it
2. Click Editability/Enable control and make sure the formula *false* is there
3. Click Save.

❖ Create text field named Rejected Reason



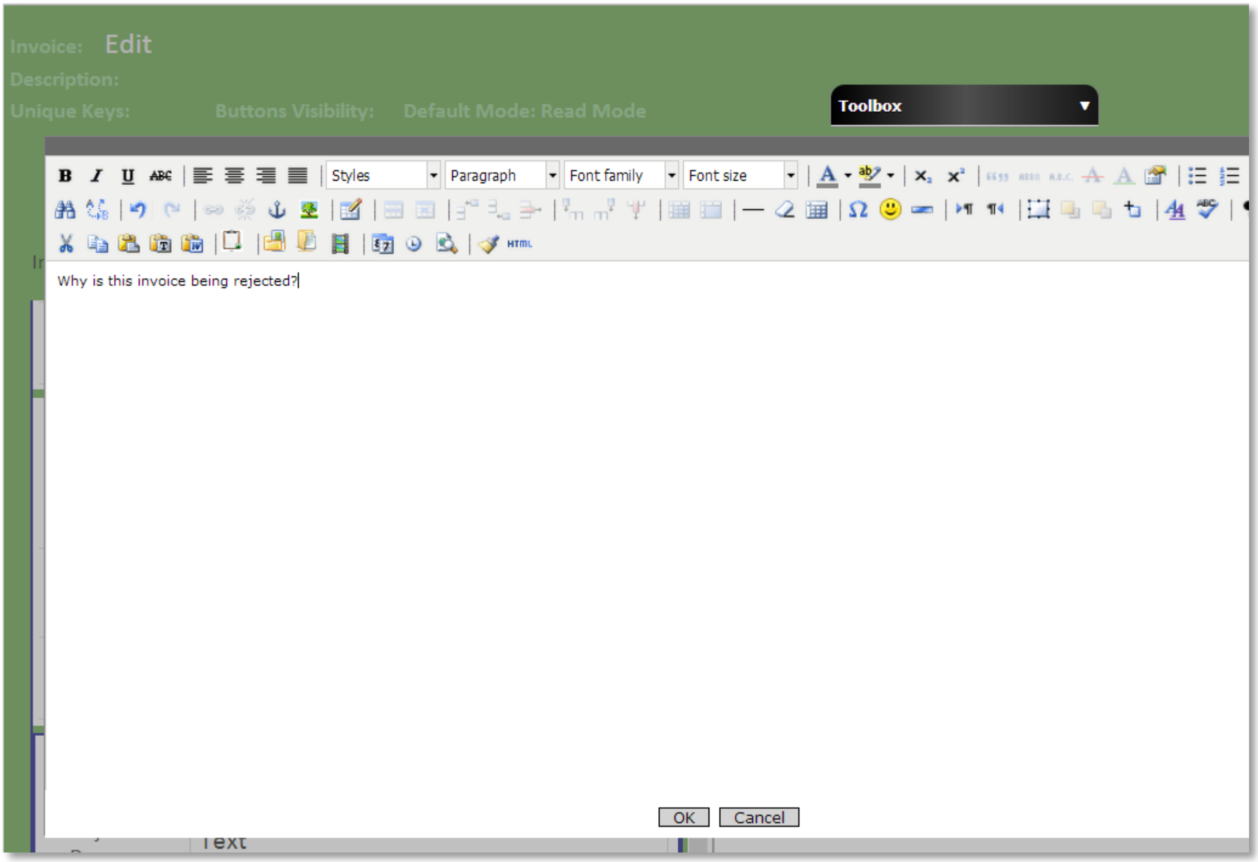
✓ Drag and drop a Text Field from the toolbox in the beneath the rejection date field

❖ Name the text field



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

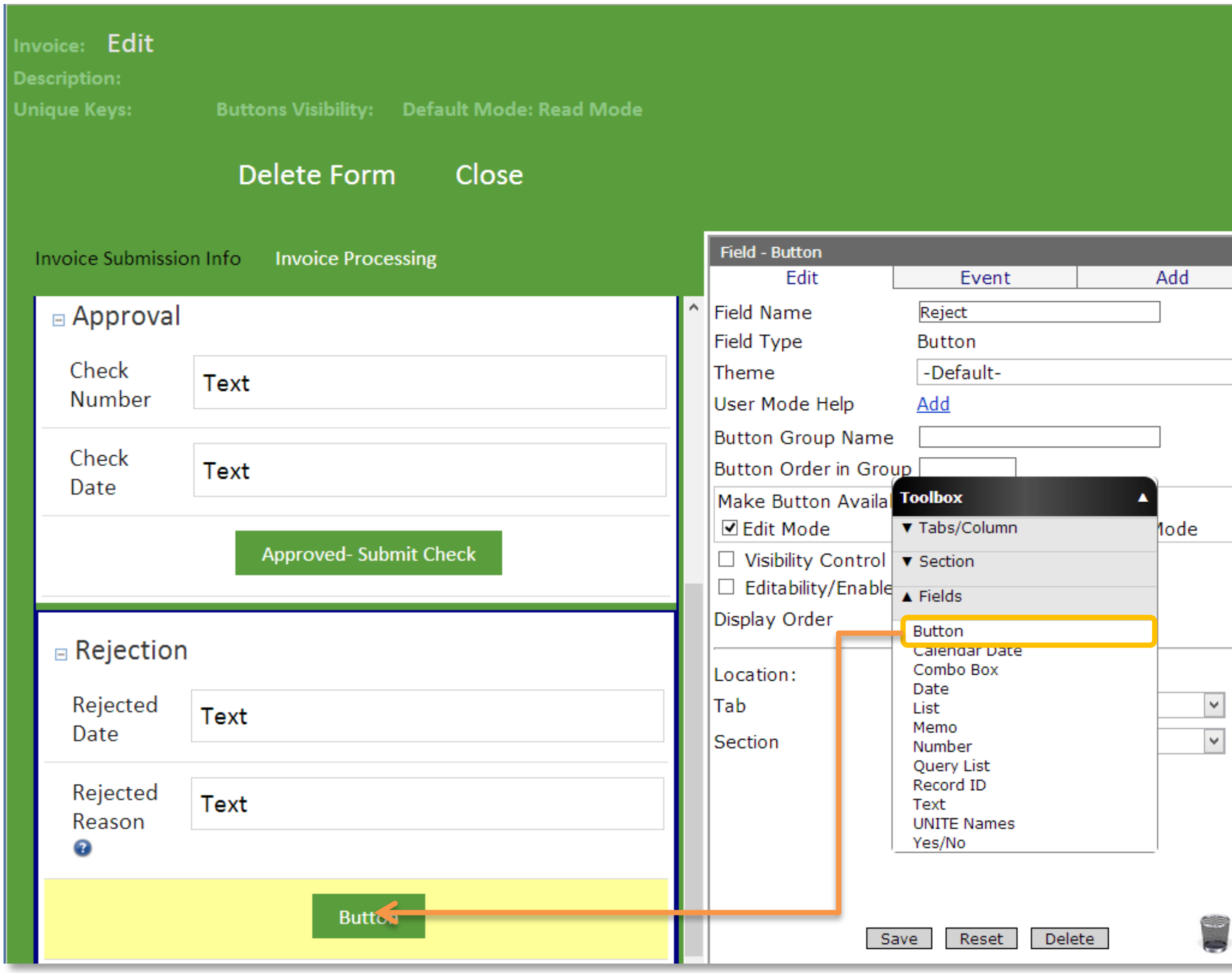
2. Click User Mode Help



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



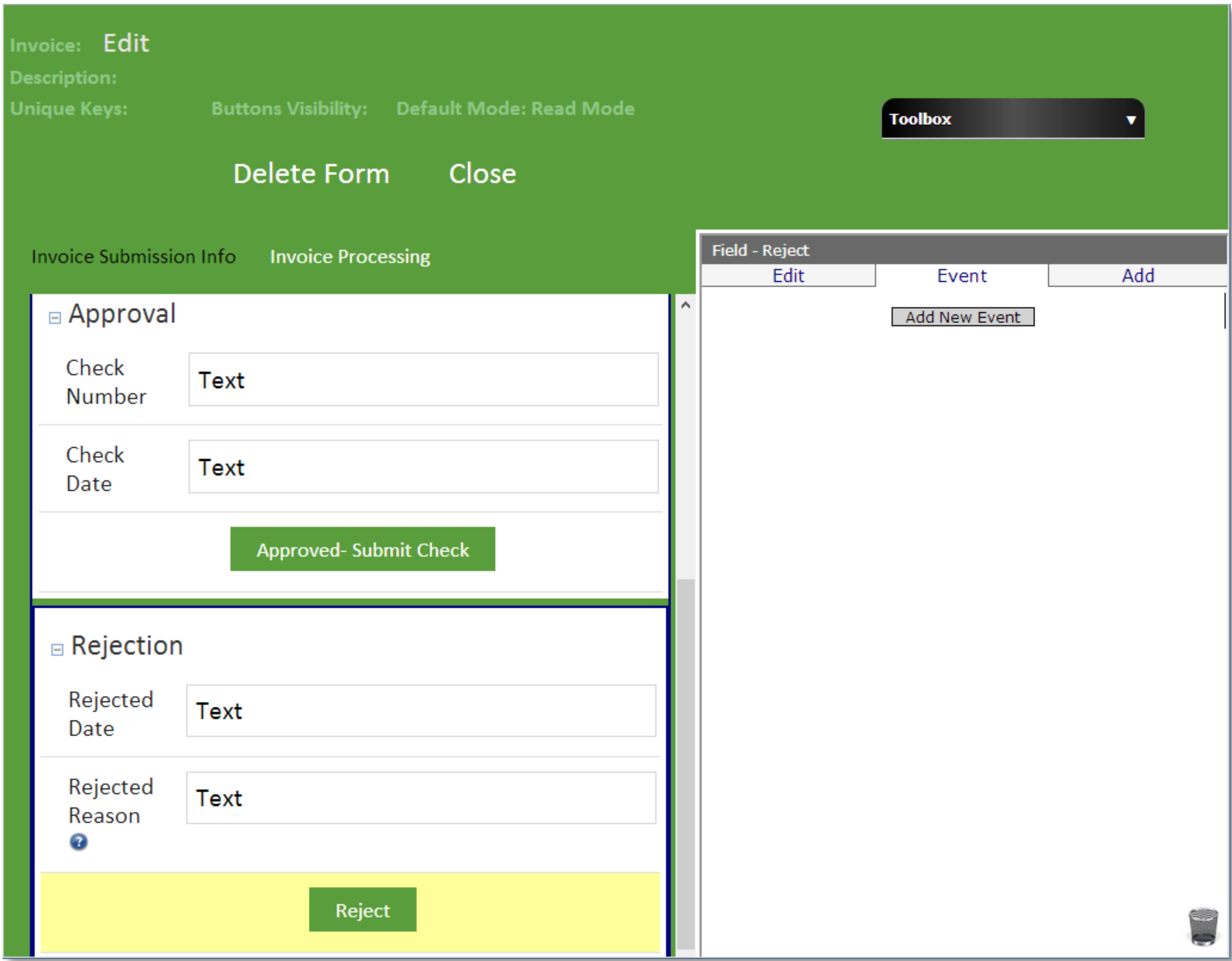
❖ Drag and drop a button field from the toolbox under the Rejected Reason Field

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

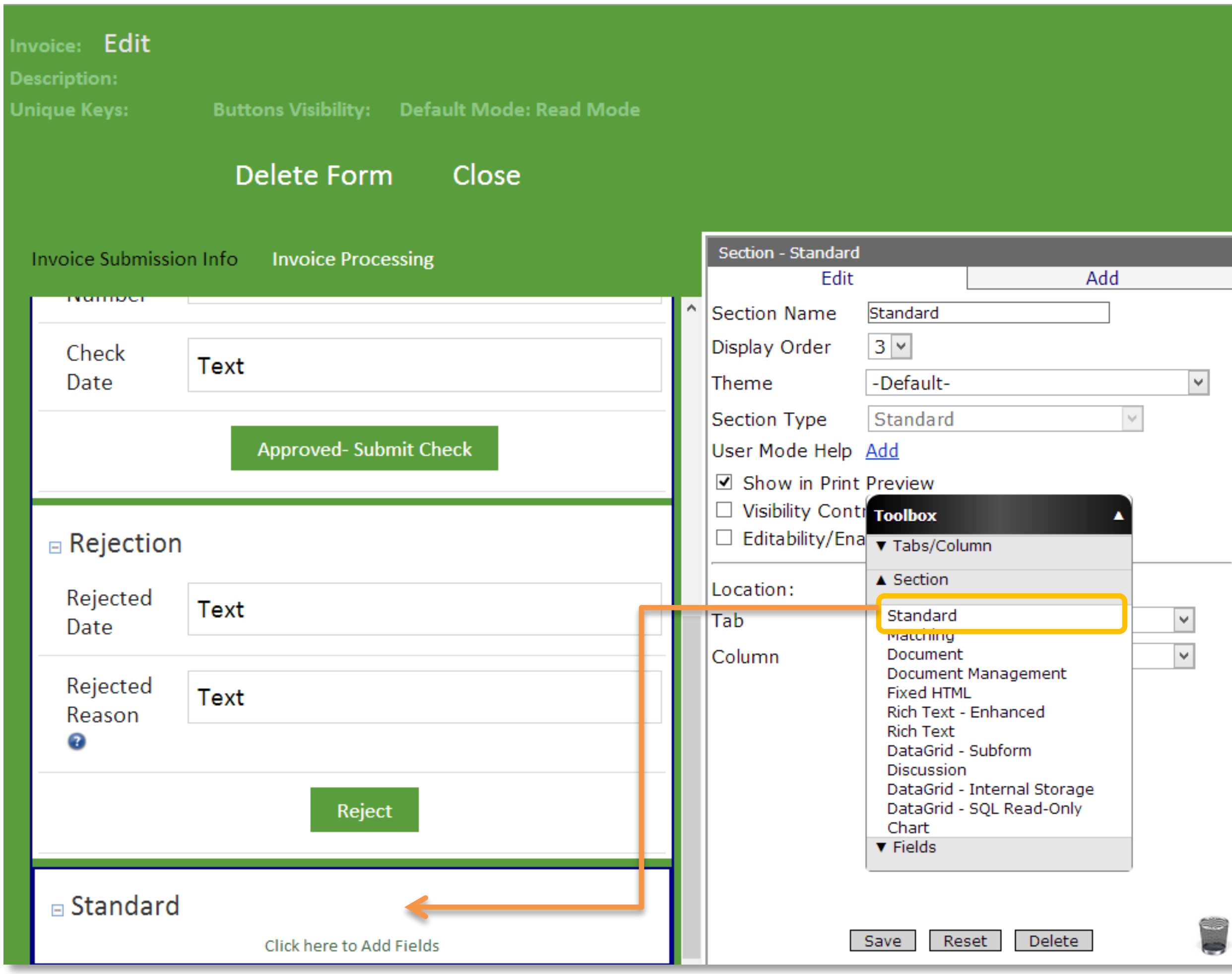
❖ Creating the button



1. Click on Add New Event

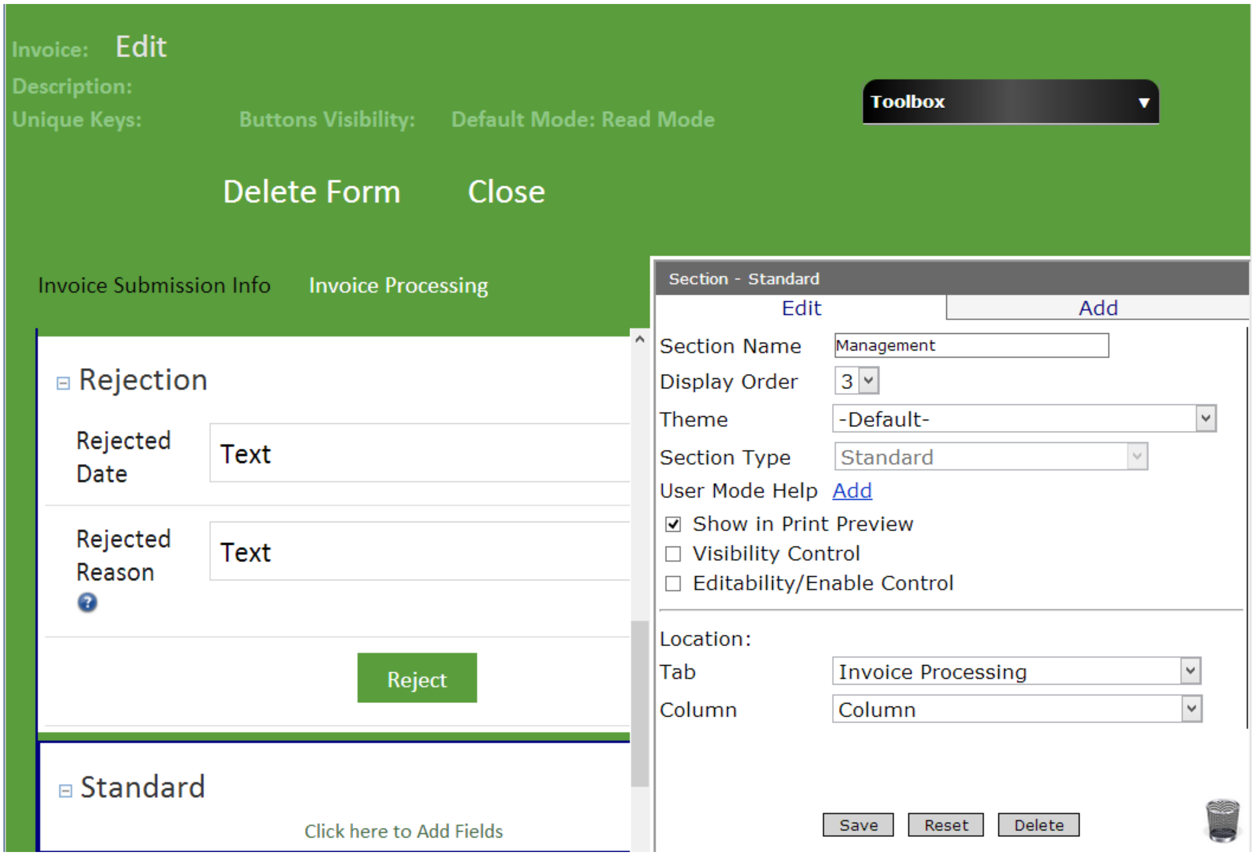
The button will send emails to the persons tagged in it. For that we will be adding on-click events to the button, however before doing that we need to create a Management Section and get back to the button later. The following screens will demonstrate described above.

❖ Create Section Named Management



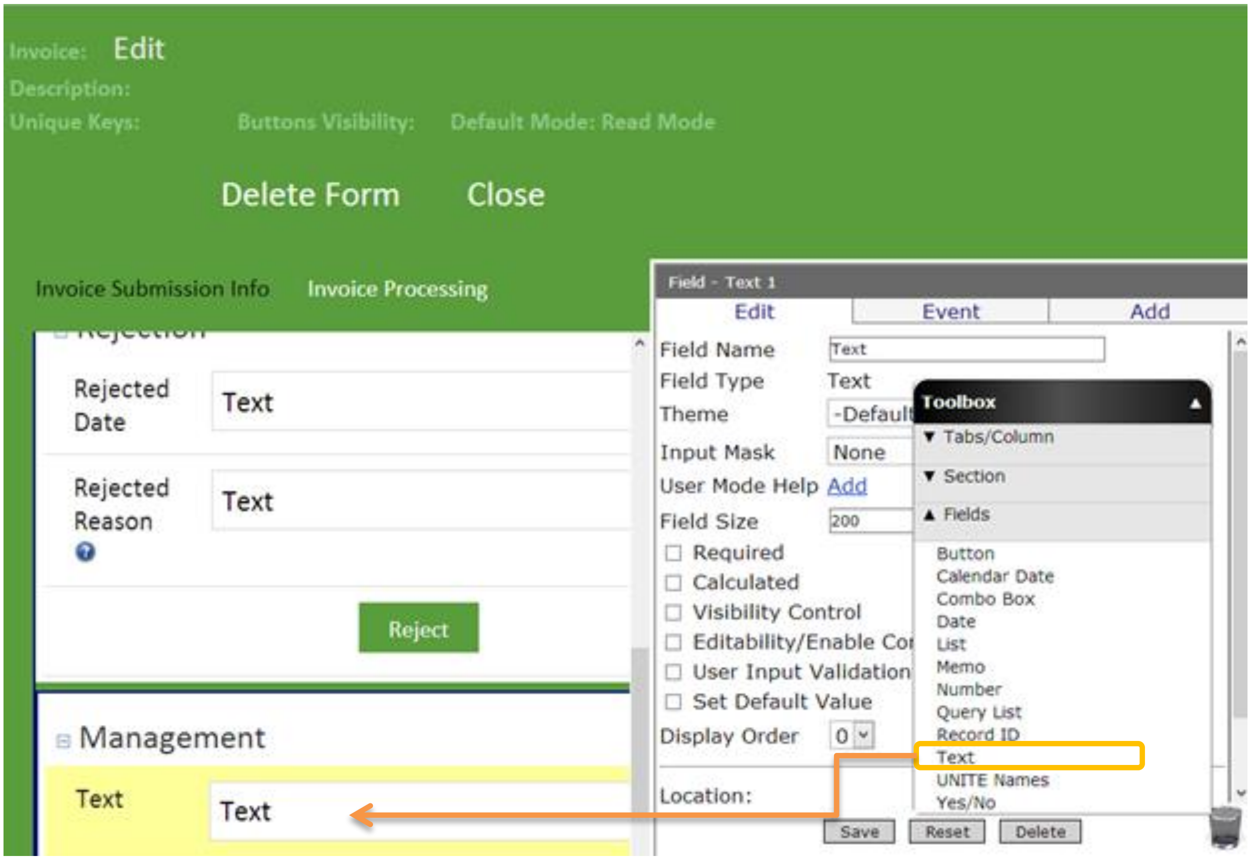
✓ Drag and drop a Standard Section from the toolbox beneath the Reject button

❖ Name the Section



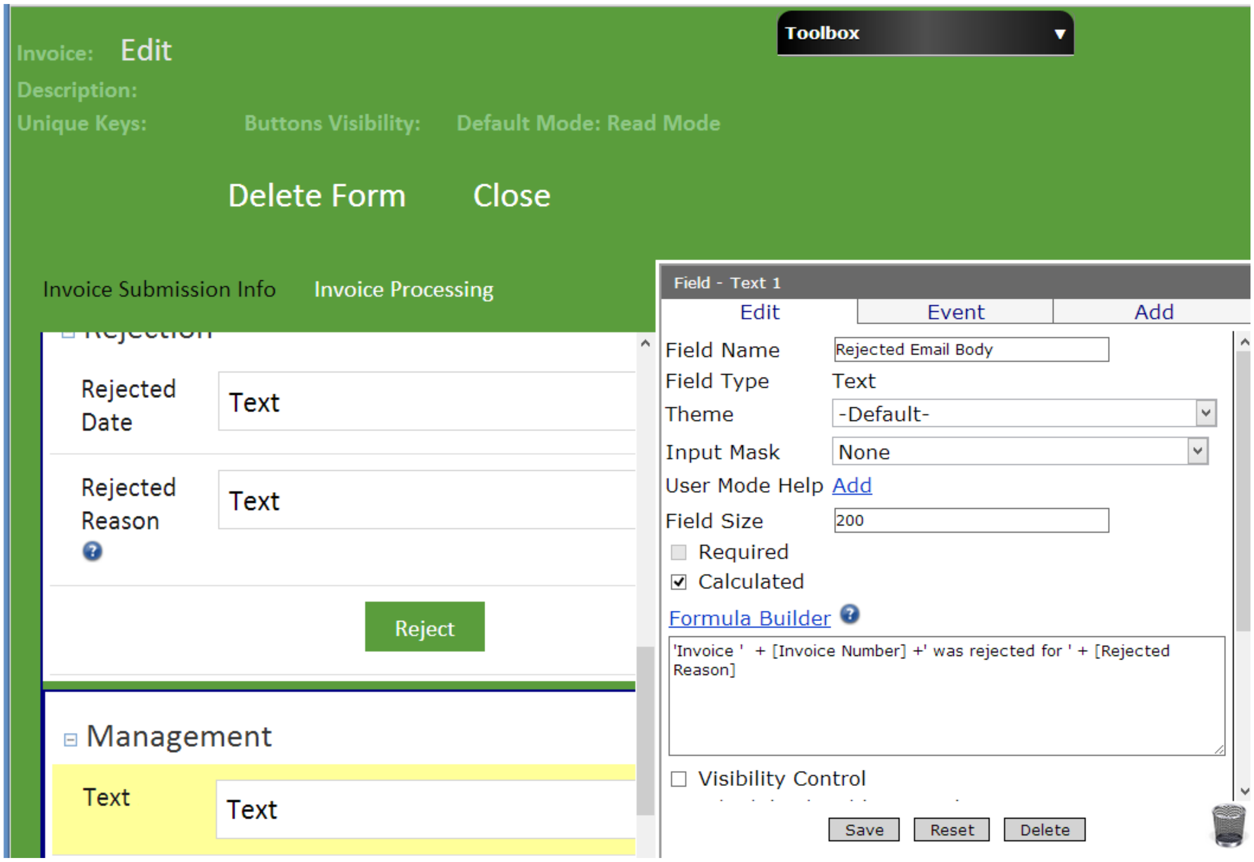
1) In the Properties Box, click in Section name and type Management
2) Check the box next to visibility control and make sure the formula box displays false.
3) Click Save.

❖ Create Text Field named Rejected Email Body



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

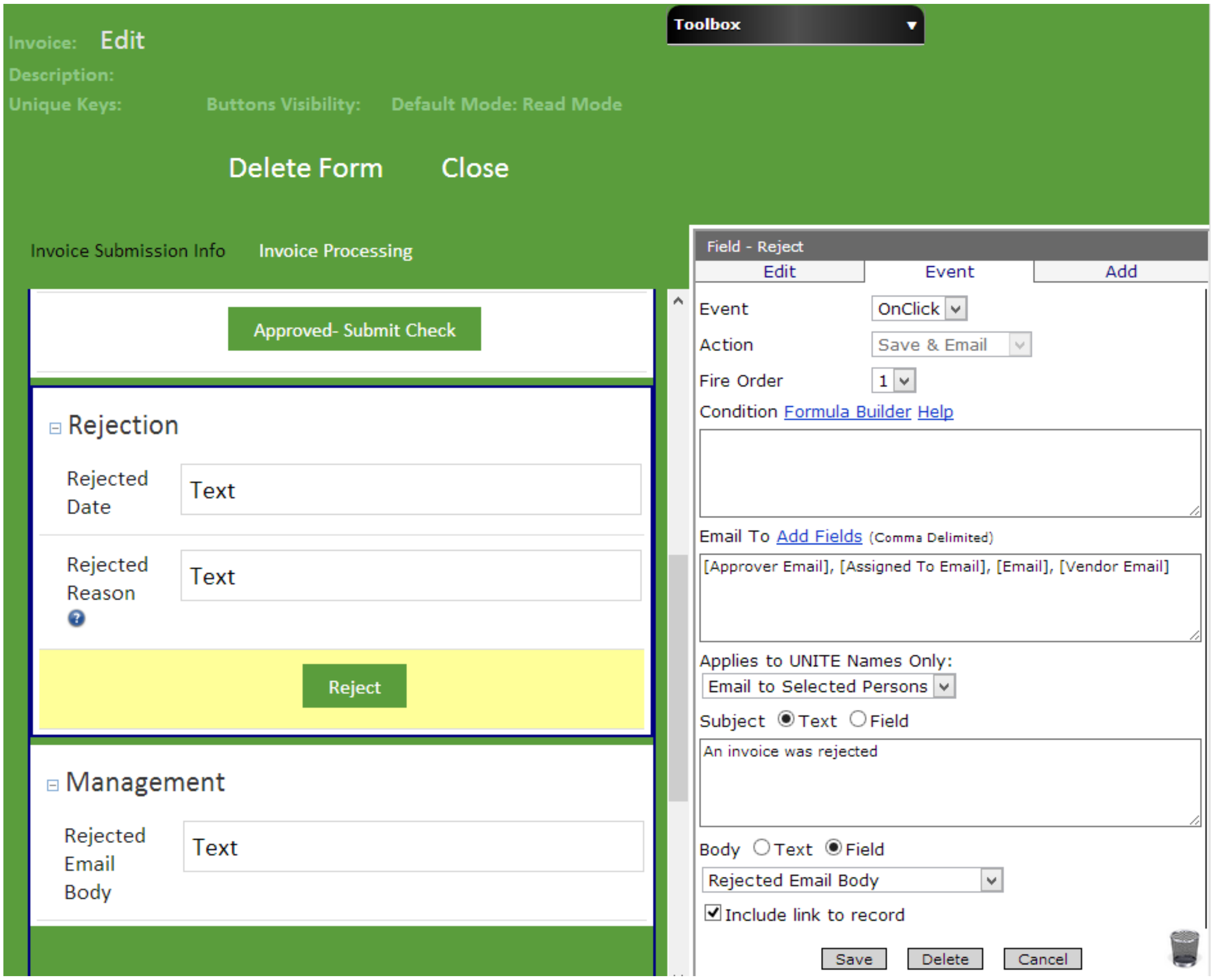
❖ Name the Text field



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

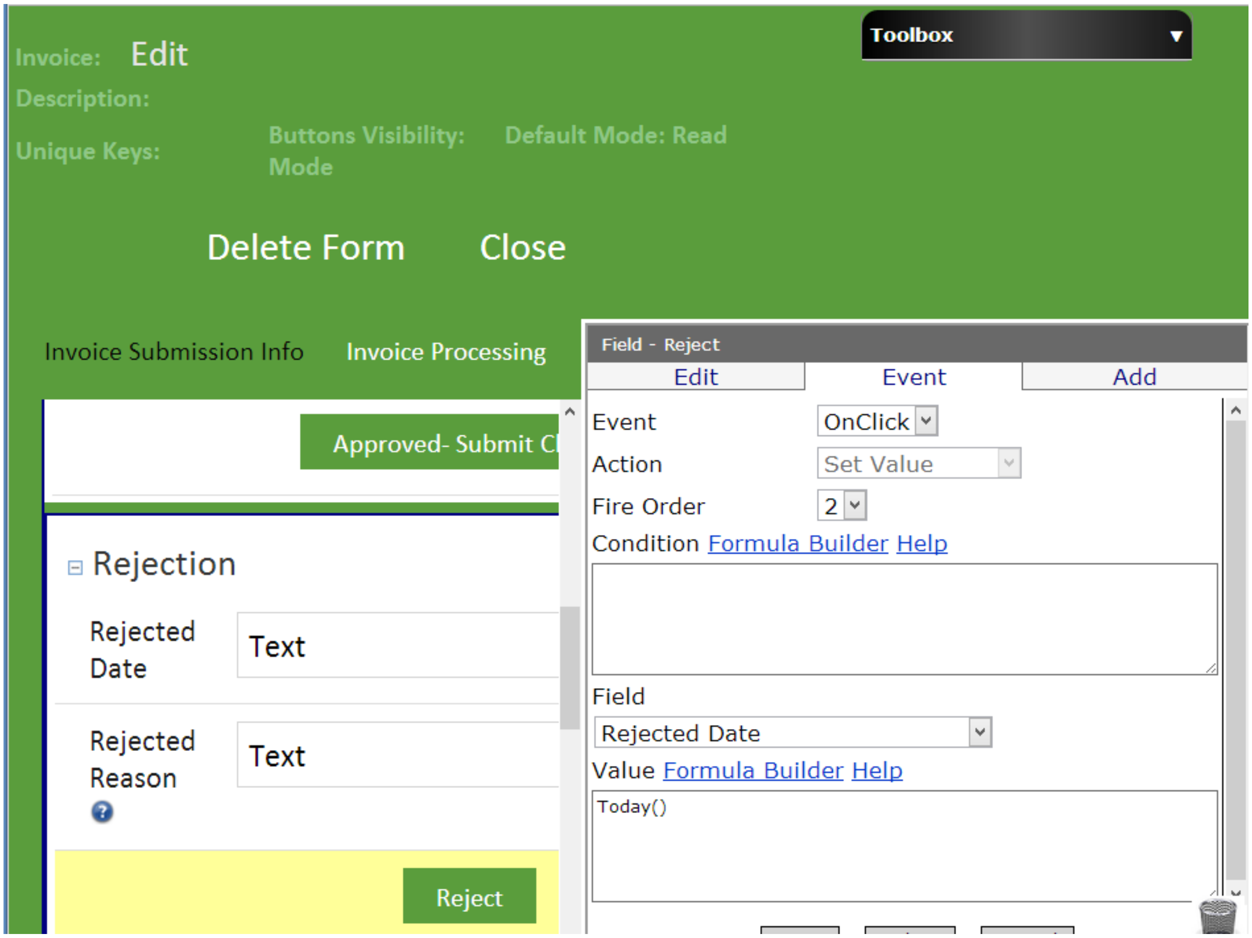


Click on Reject Button

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

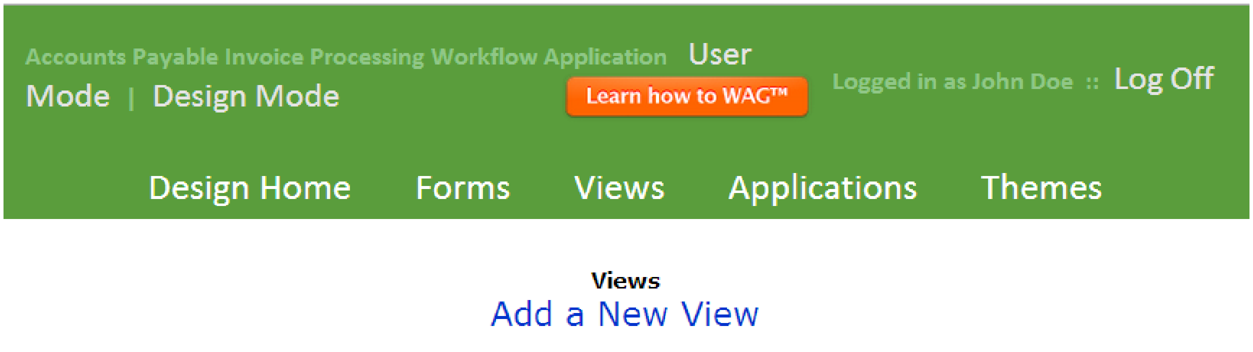
   [Approver Email], [Assigned To Email], [Email], [Vendor Email]
5. In the Subject box type ***An invoice was rejected***
6. Next to Body click **Rejected Email Body**
7. Check box next to ***Include link to record.***
8. Click **Save**

❖ 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



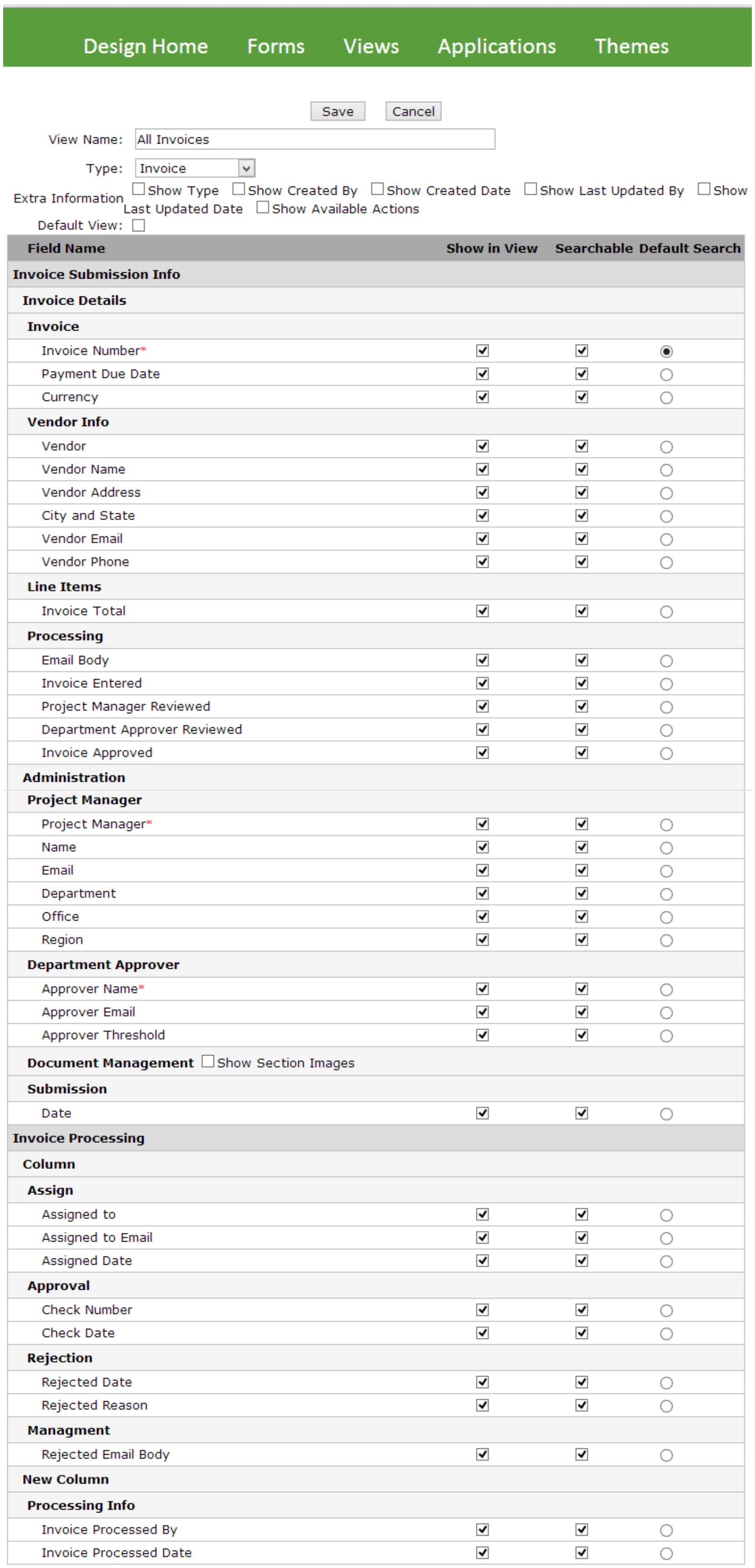
We will create views to see the invoices we have created and where they are in the process. To this effect, we can filter which invoices appear in which views by manipulating the view definition. There will be five separate views:

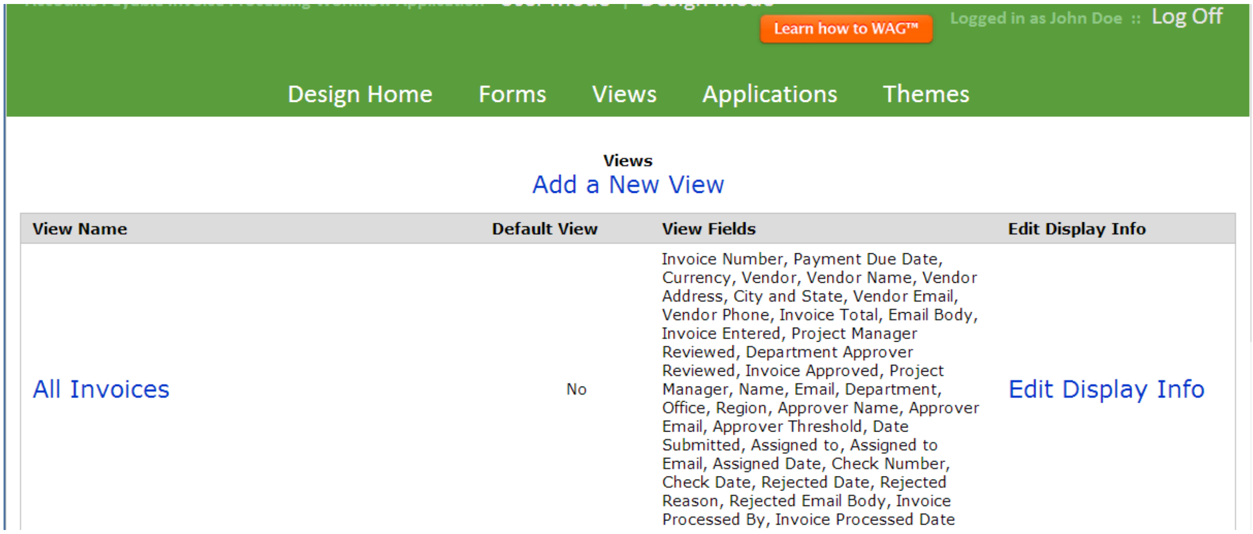
- All Invoices
- Completed Invoices
- Invoices Awaiting Project Manager Review
- Invoices in Accounting Queue
- Invoices Waiting for Department Approver

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

<u>As Shown on the screen below</u>

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.

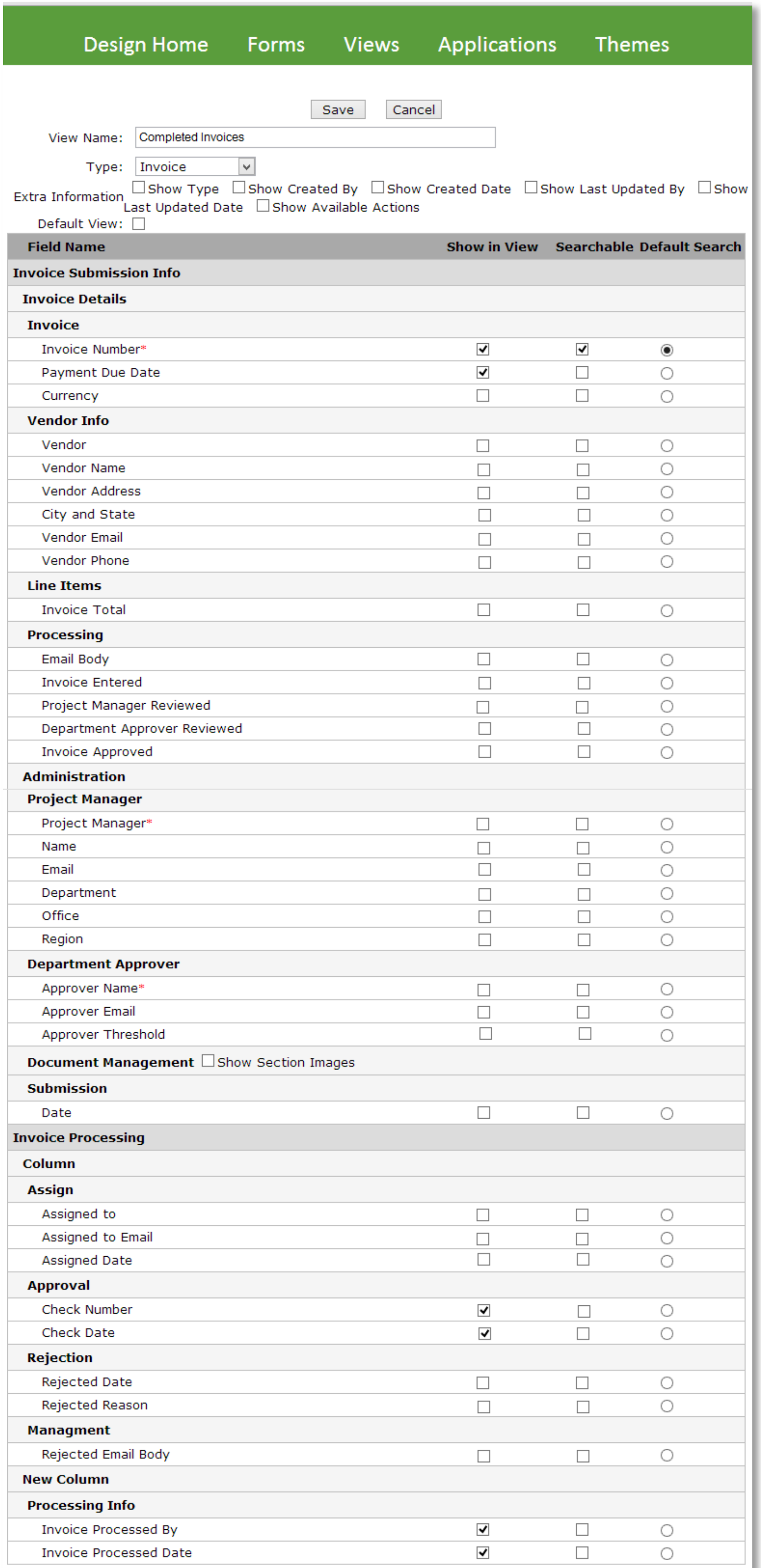

Design Home
Forms
Views
Applications
Themes
Save
Cancel
View Name: All Invoices
Type: Invoice
Extra Information Show Type Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions
Default View:
Field Name
Show in View
Searchable
Default Search
Invoice Submission Info
Invoice Details
Invoice
Invoice Number*
Payment Due Date
Currency
Vendor Info
Vendor
Vendor Name
Vendor Address
City and State
Vendor Email
Vendor Phone
Line Items
Invoice Total
Processing
Email Body
Invoice Entered
Project Manager Reviewed
Department Approver Reviewed
Invoice Approved
Administration
Project Manager
Project Manager*
Name
Email
Department
Office
Region
Department Approver
Approver Name*
Approver Email
Approver Threshold
Document Management Show Section Images
Submission
Date
Invoice Processing
Column
Assign
Assigned to
Assigned to Email
Assigned Date
Approval
Check Number
Check Date
Rejection
Rejected Date
Rejected Reason
Managment
Rejected Email Body
New Column
Processing Info
Invoice Processed By
Invoice Processed Date



✓ Click Add New View

<u>As Shown on the screen below</u>

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



Design Home | Forms | Views | Applications | Themes

Save | Cancel

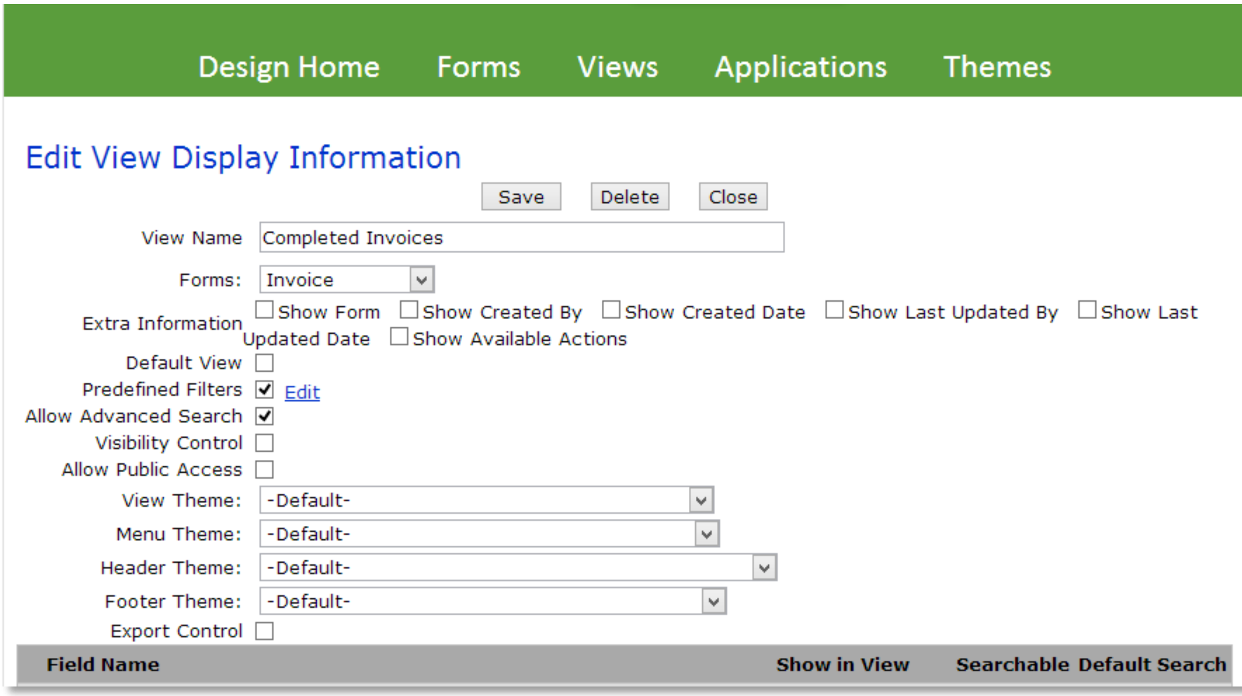
View Name: Completed Invoices

Type: Invoice

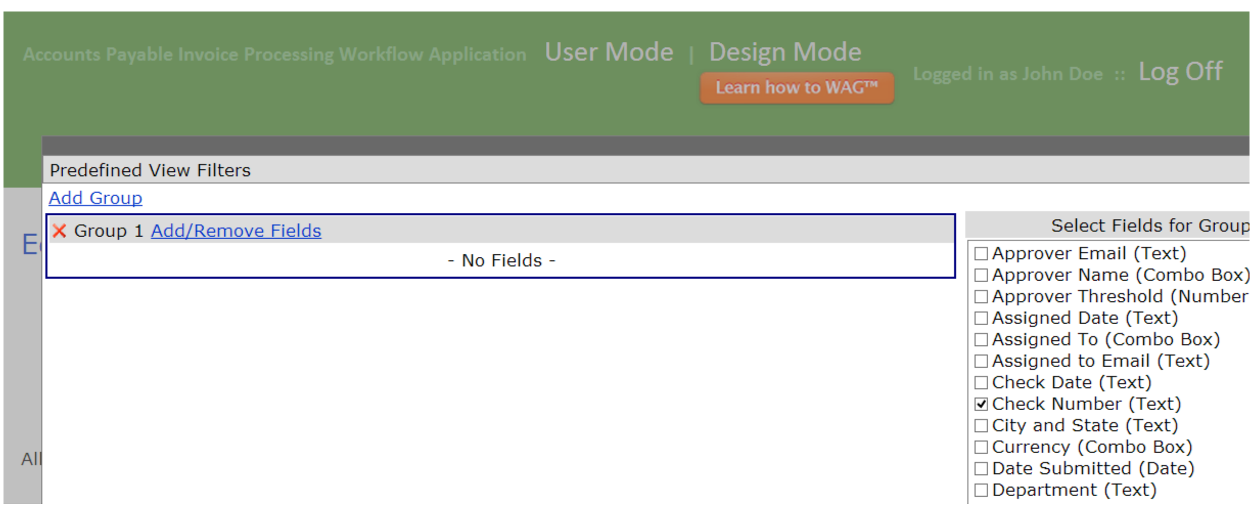
Extra Information: ☐ Show Type ☐ Show Created By ☐ Show Created Date ☐ Show Last Updated By ☐ Show Last Updated Date ☐ Show Available Actions

Default View: ☐

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

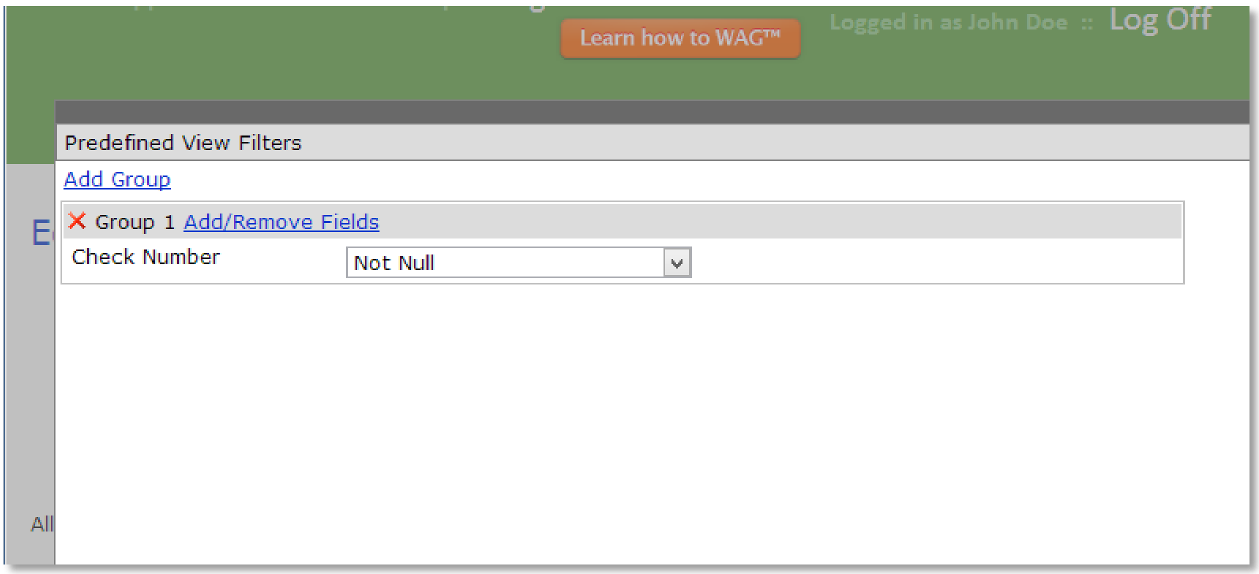


✓ Check Predefined Filters



1. Check *Check Number* from the “Select Fields for Group 1” box.

2. Click Ok



1. Select “Not Null” from the dropdown box next to Check Number.

2. Click Save.

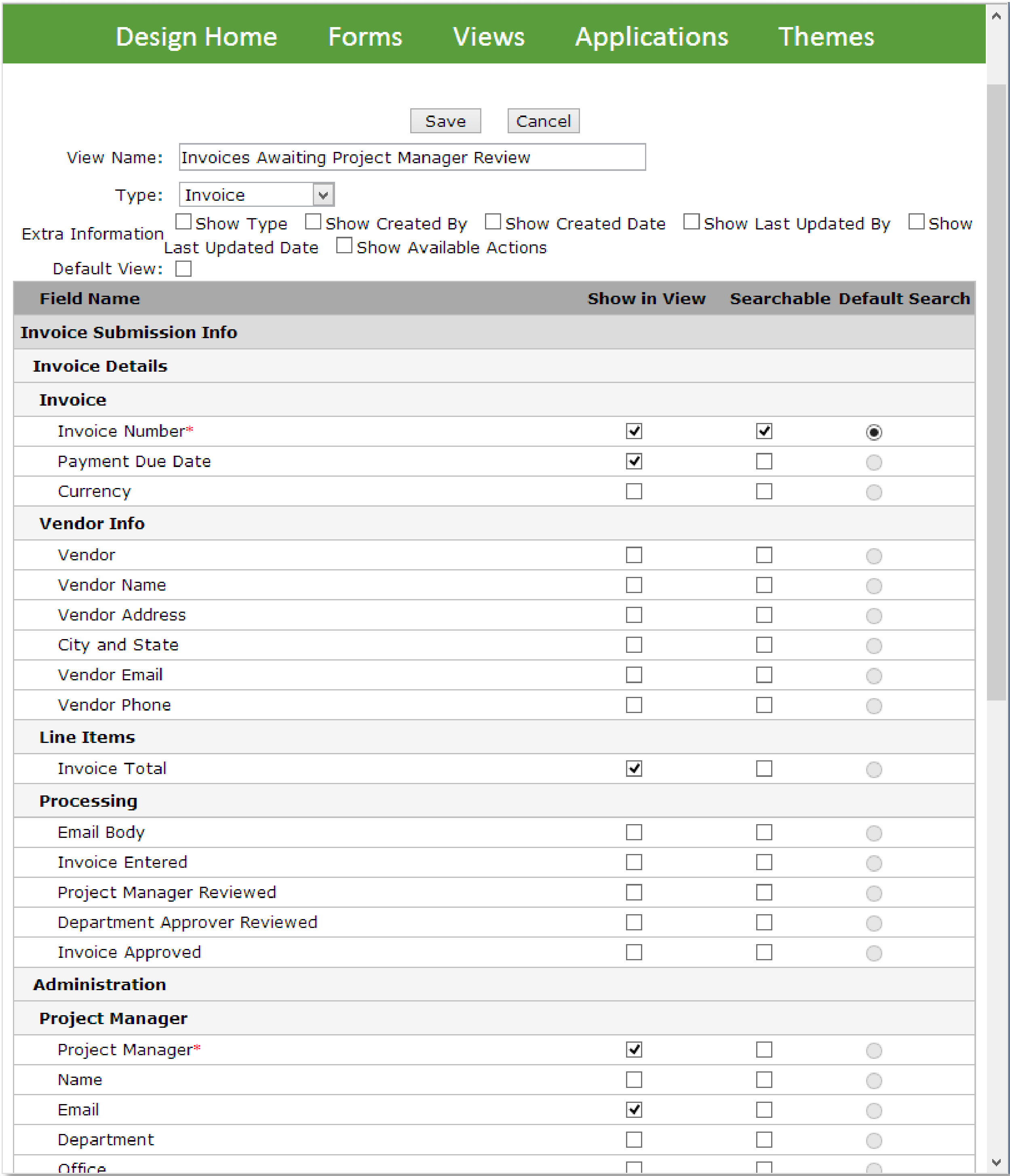
✓ Click on Views

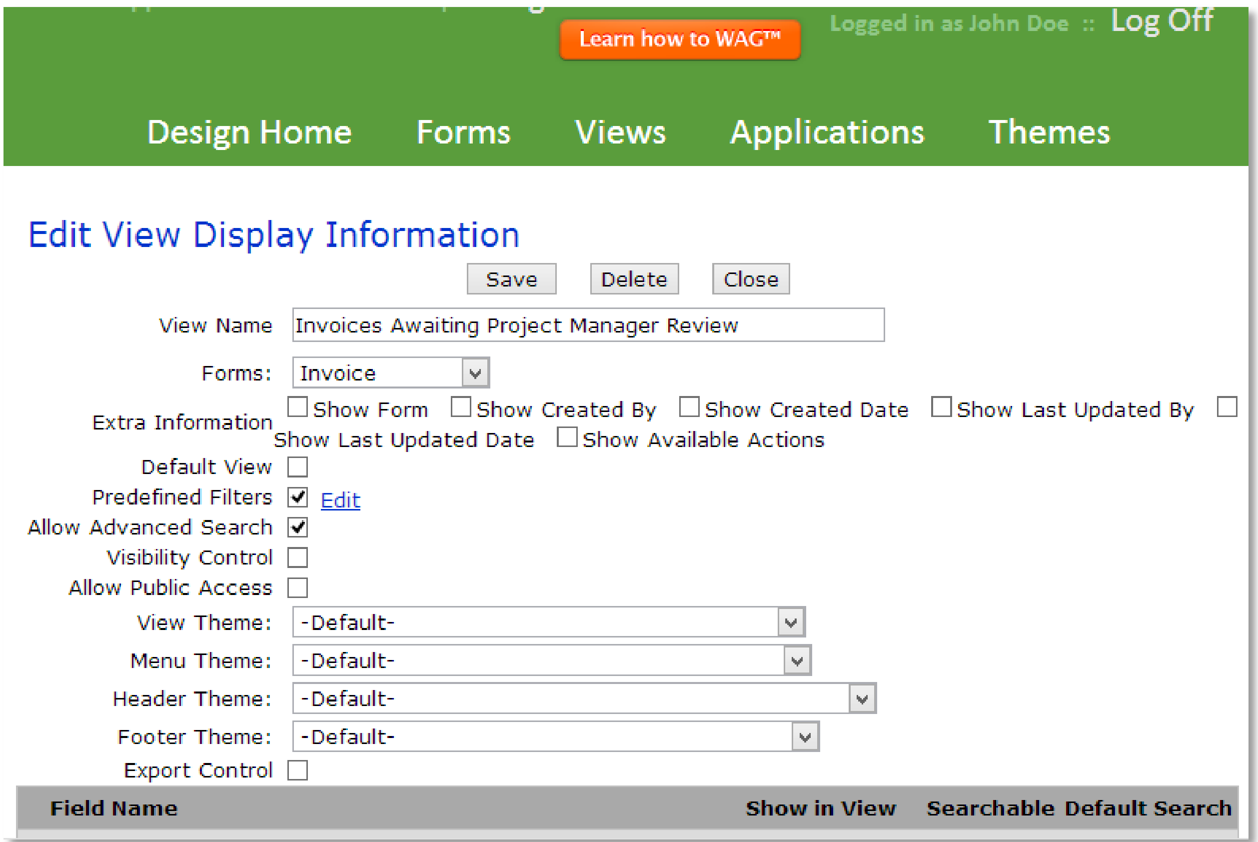
Click Add New View

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”:

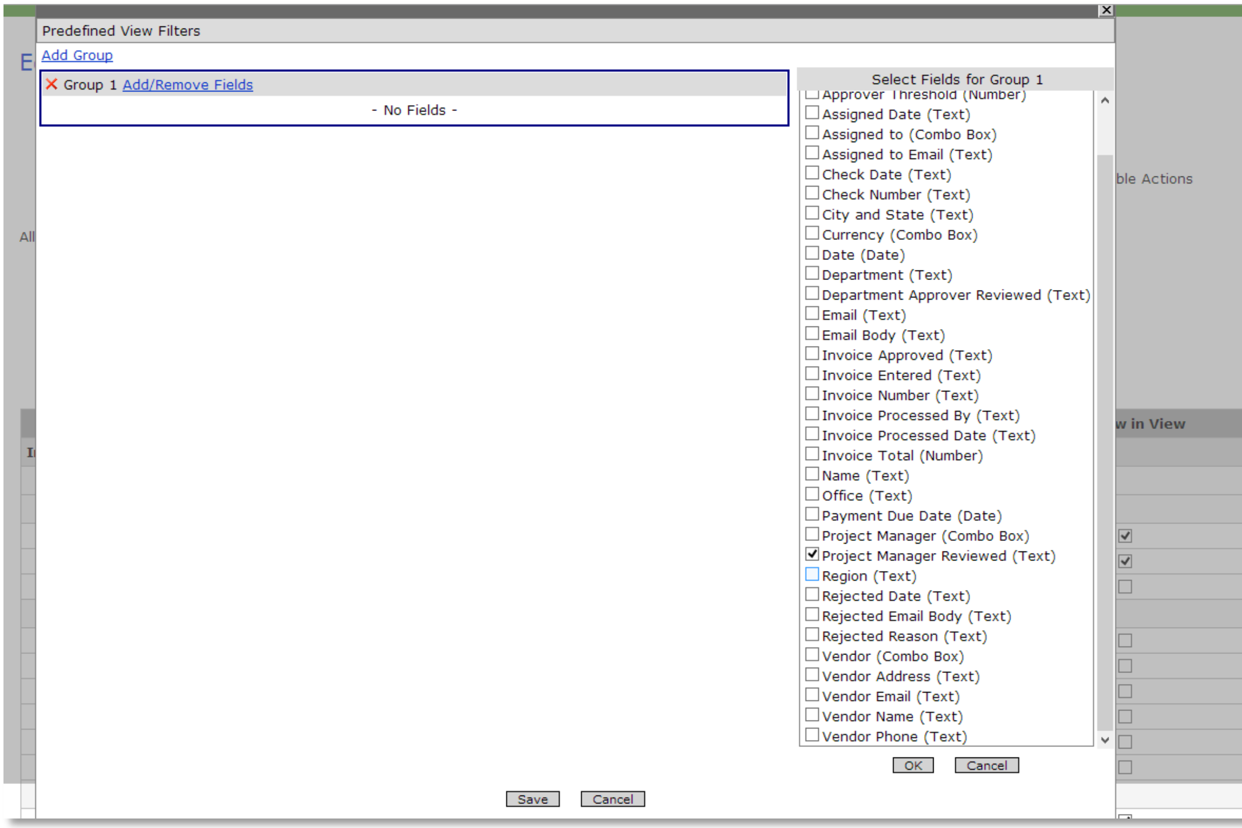
- Invoice Number
- Payment Due Date
- Invoice Total
- Project Manager
- Email

4. Select Invoice Number as the Default Search
5. Click Save
6. Click Back

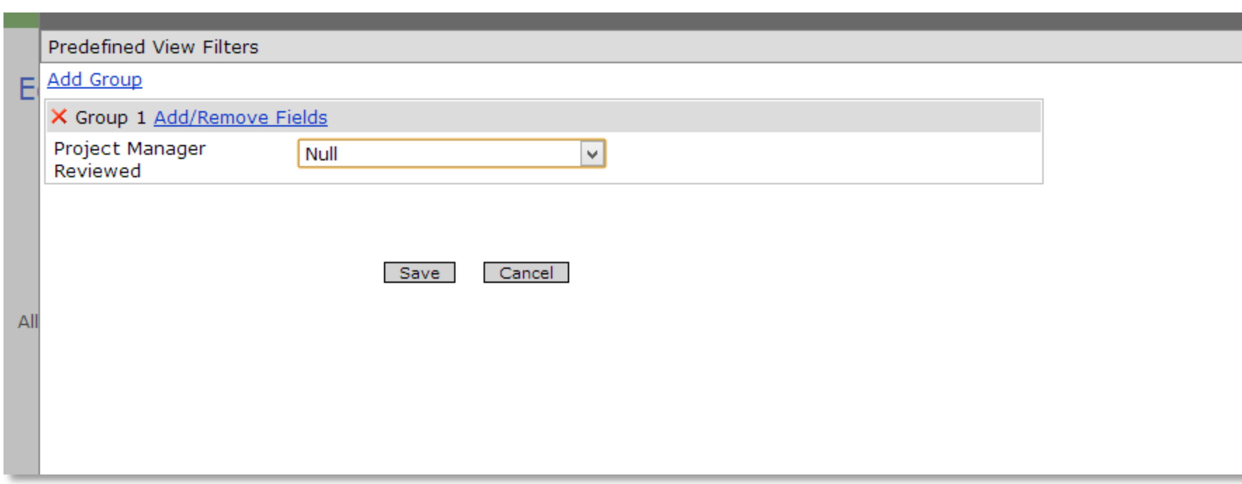

Design Home
Forms
Views
Applications
Themes
Save
Cancel
View Name: Invoices Awaiting Project Manager Review
Type: Invoice
Extra Information Show Type Show Created By Show Created Date Show Last Updated By Show Last Updated Date Show Available Actions
Default View:
Field Name
Show in View
Searchable
Default Search
Invoice Submission Info
Invoice Details
Invoice
Invoice Number*
Payment Due Date
Currency
Vendor Info
Vendor
Vendor Name
Vendor Address
City and State
Vendor Email
Vendor Phone
Line Items
Invoice Total
Processing
Email Body
Invoice Entered
Project Manager Reviewed
Department Approver Reviewed
Invoice Approved
Administration
Project Manager
Project Manager*
Name
Email
Department
Office



✓ Check “Predefined Filters”

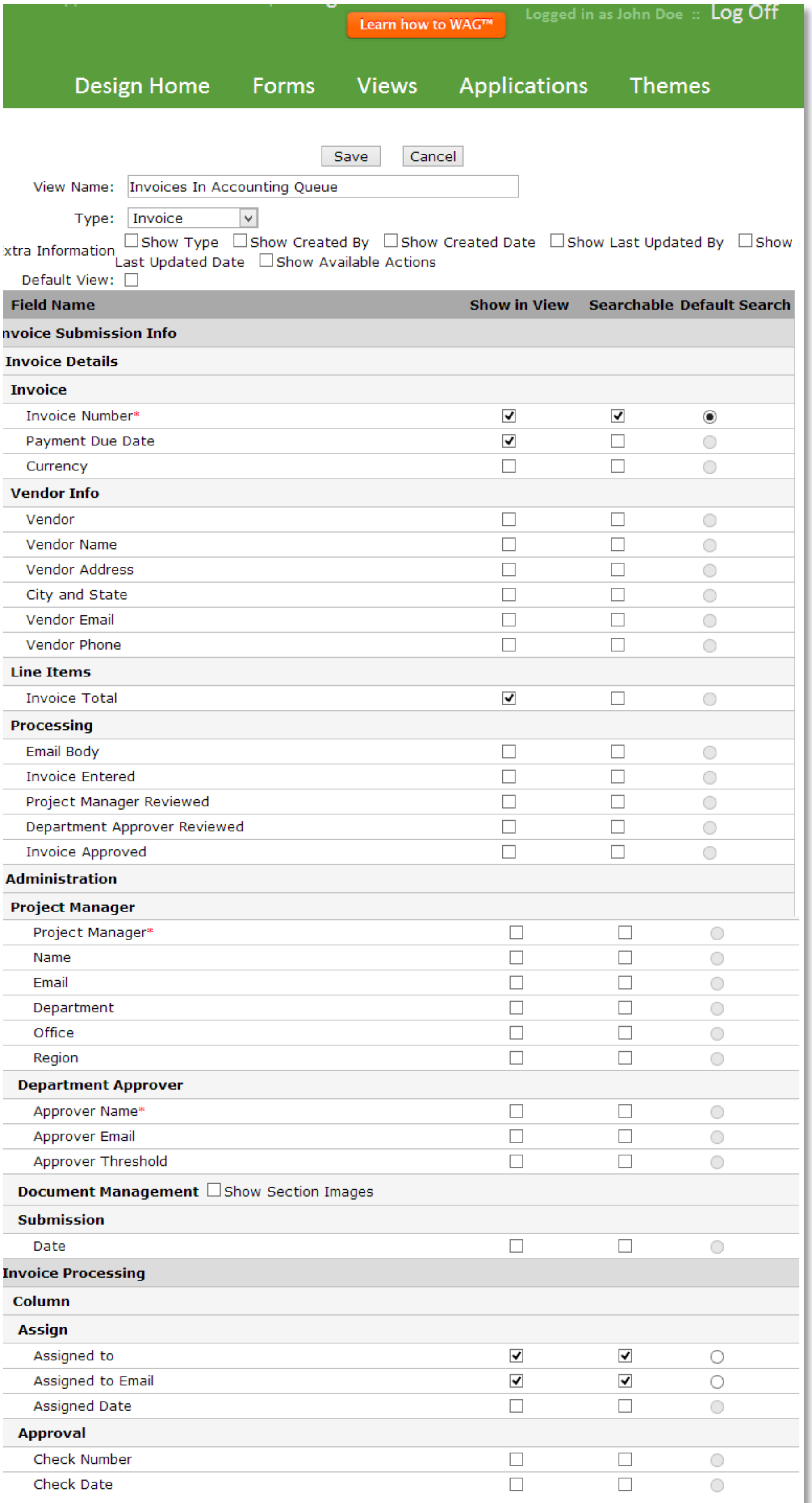


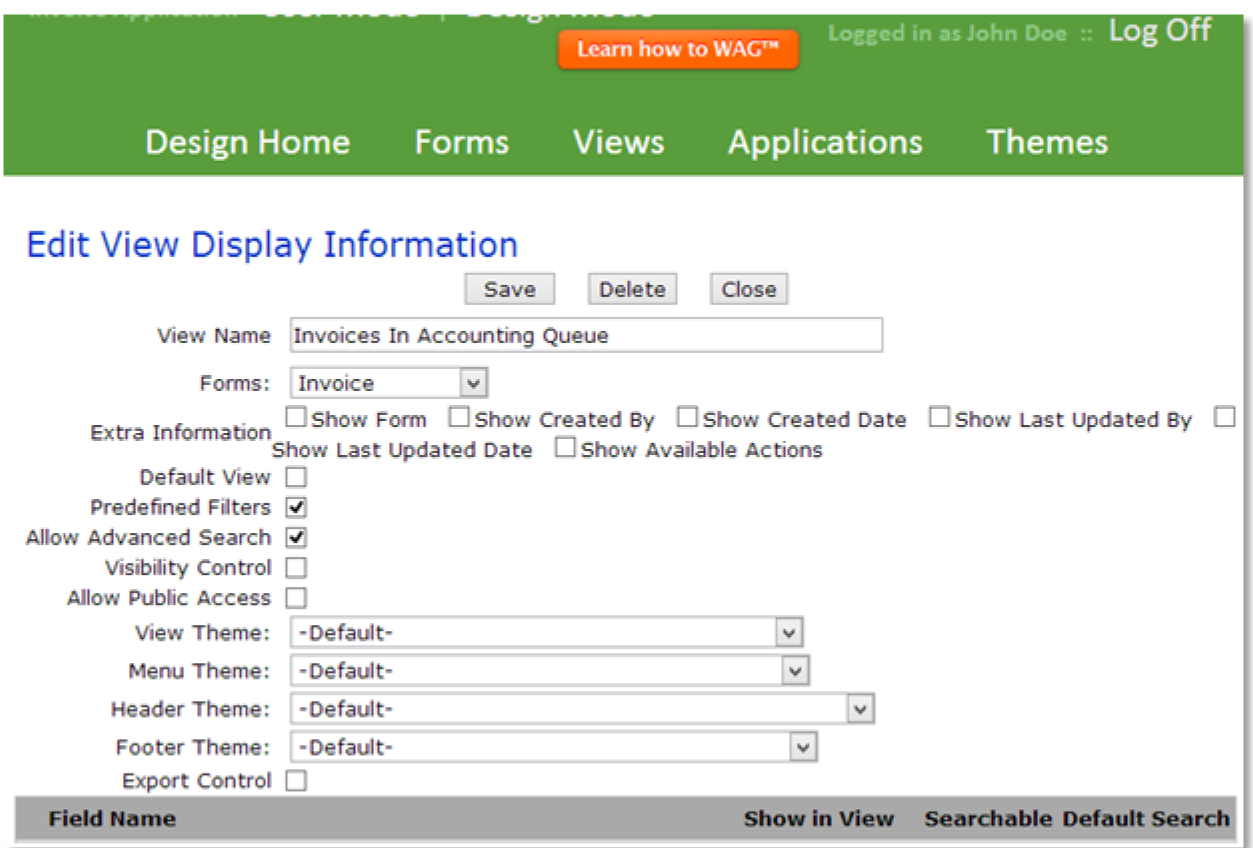
1. Check "Project Manager Reviewed" from the "Select Fields for Group 1" box.
2. Click Ok



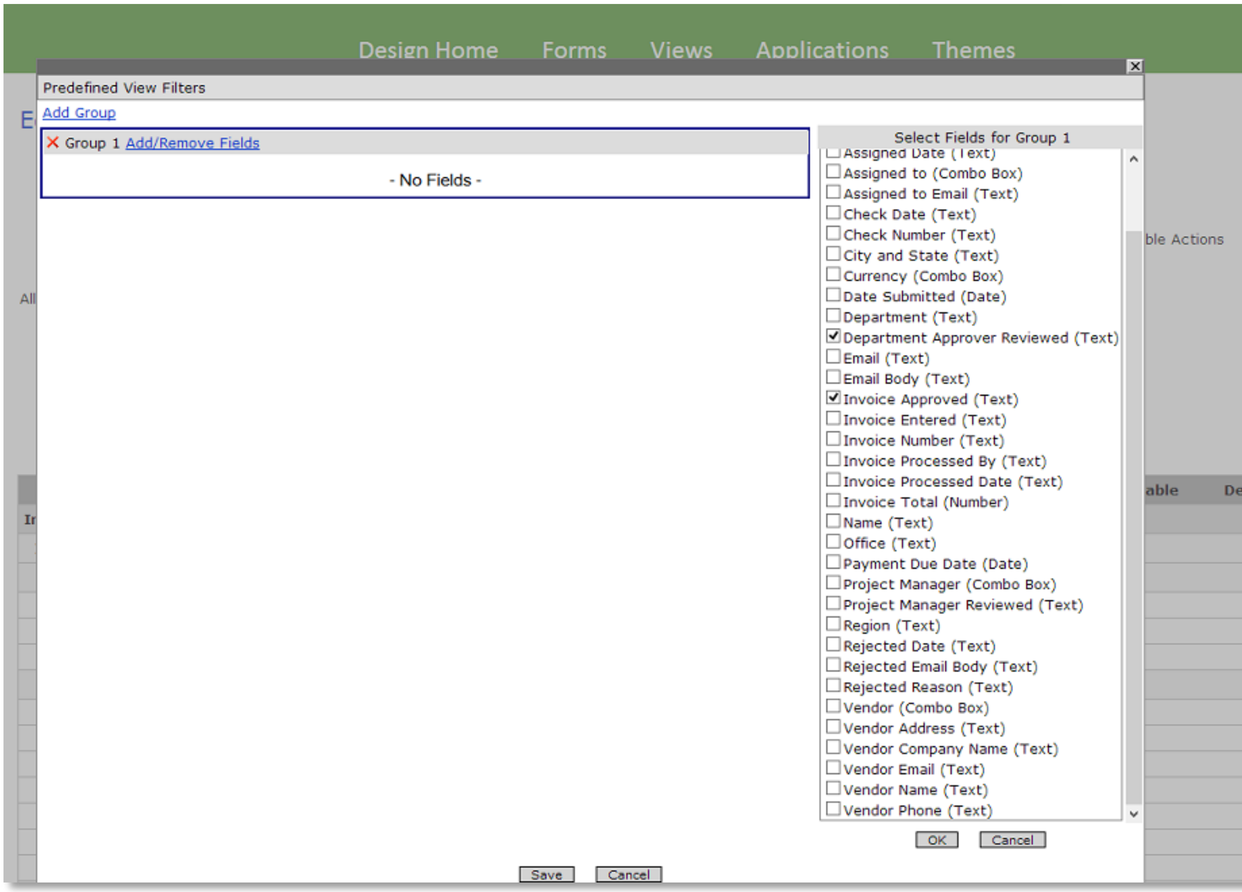
1. Select "Not Null" from the dropdown box next to Project Manager Reviewed.
2. Click Save

1. Click Views
2. Click Add New View
   <u>As Shown on the Screen of next page</u>
3. Type "Invoices in Accounting Queue" 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
   - Assigned To
   - Assigned To Email
6. Select Invoice Number as the Default Search
7. Click Save
8. Click Back

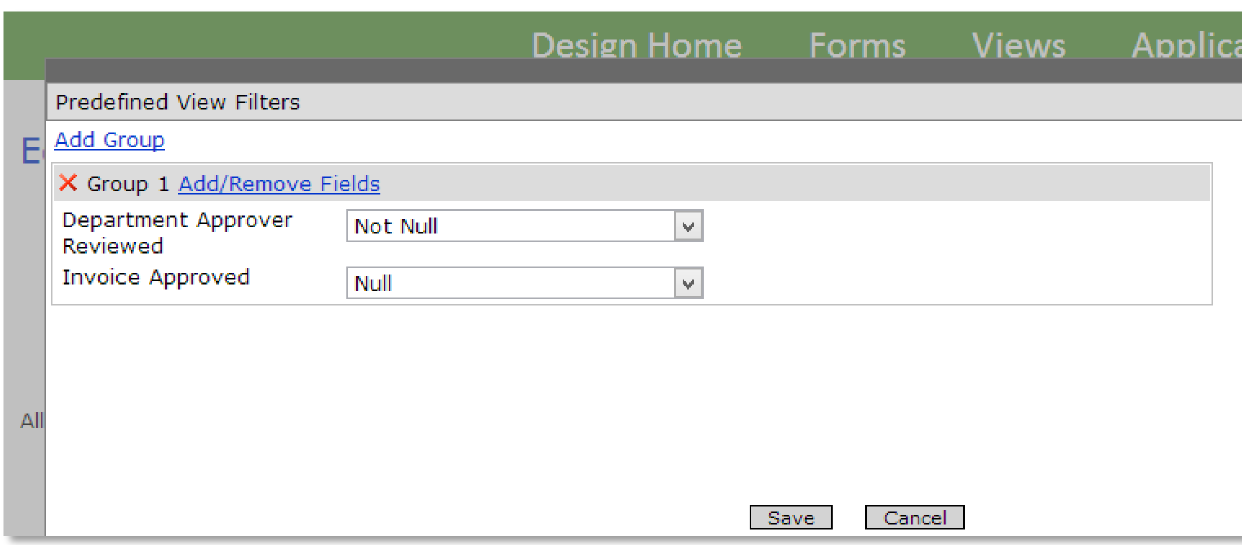

Learn how to WAG™
Logged in as John Doe :: Log Off
Design Home
Forms
Views
Applications
Themes
Save
Cancel
View Name: Invoices In Accounting Queue
Type: Invoice
xtra Information
Show Type
Show Created By
Show Created Date
Show Last Updated By
Show Last Updated Date
Show Available Actions
Default View:
Field Name
Show in View
Searchable
Default Search
nvoice Submission Info
Invoice Details
Invoice
Invoice Number*
Payment Due Date
Currency
Vendor Info
Vendor
Vendor Name
Vendor Address
City and State
Vendor Email
Vendor Phone
Line Items
Invoice Total
Processing
Email Body
Invoice Entered
Project Manager Reviewed
Department Approver Reviewed
Invoice Approved
Administration
Project Manager
Project Manager*
Name
Email
Department
Office
Region
Department Approver
Approver Name*
Approver Email
Approver Threshold
Document Management
Show Section Images
Submission
Date
Invoice Processing
Column
Assign
Assigned to
Assigned to Email
Assigned Date
Approval
Check Number
Check Date



✓ Check Predefined Filters



✓ Check Department Approver Reviewed and Invoice Approved and click OK

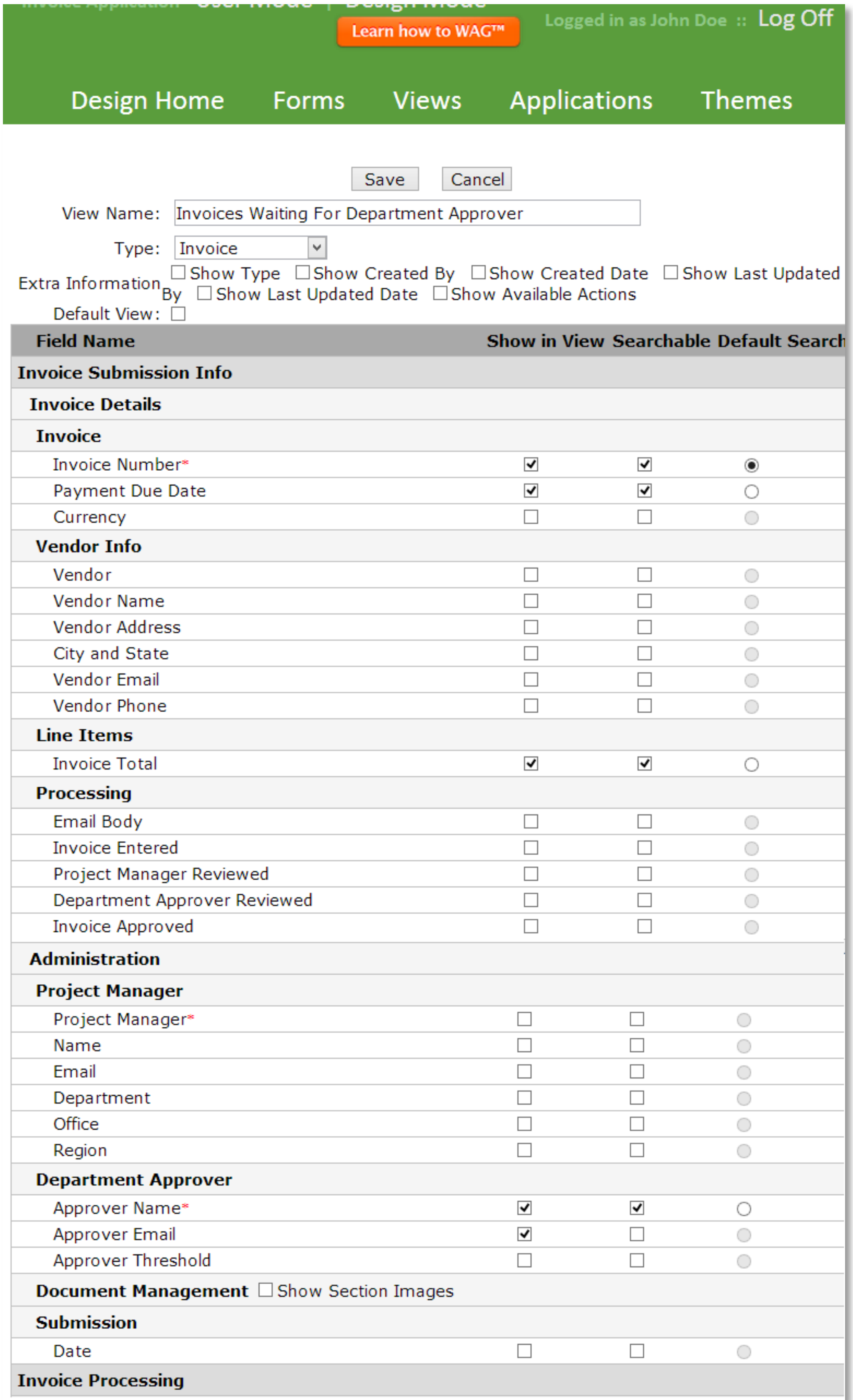


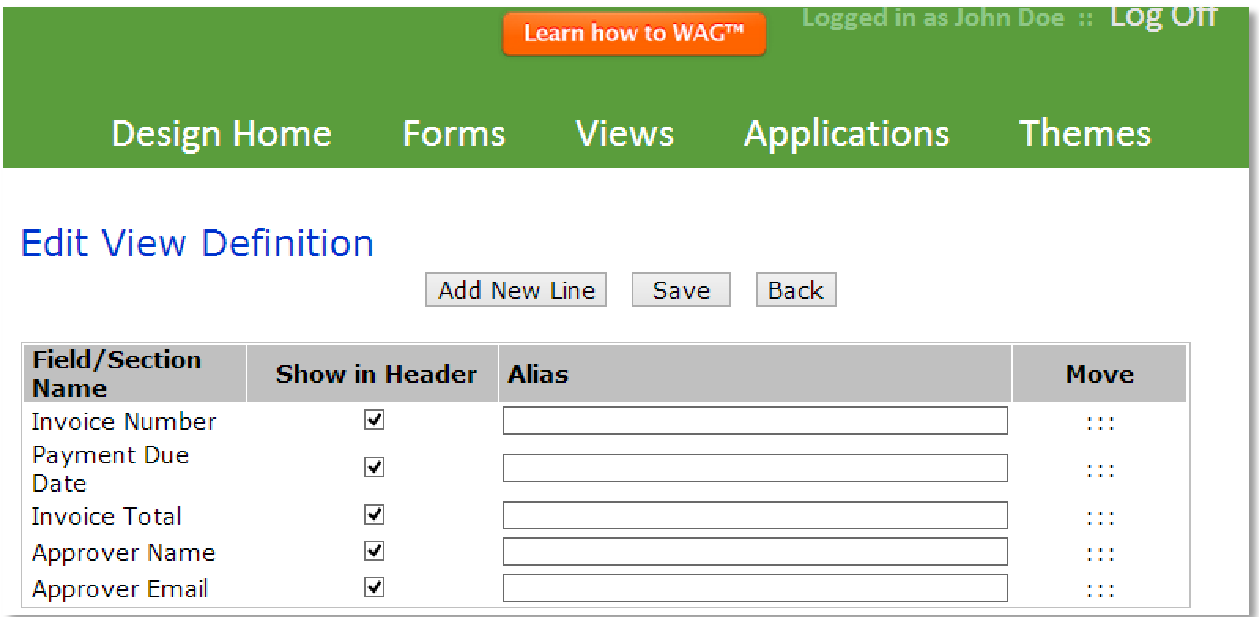
❖ *Invoices Waiting for Department Approval*

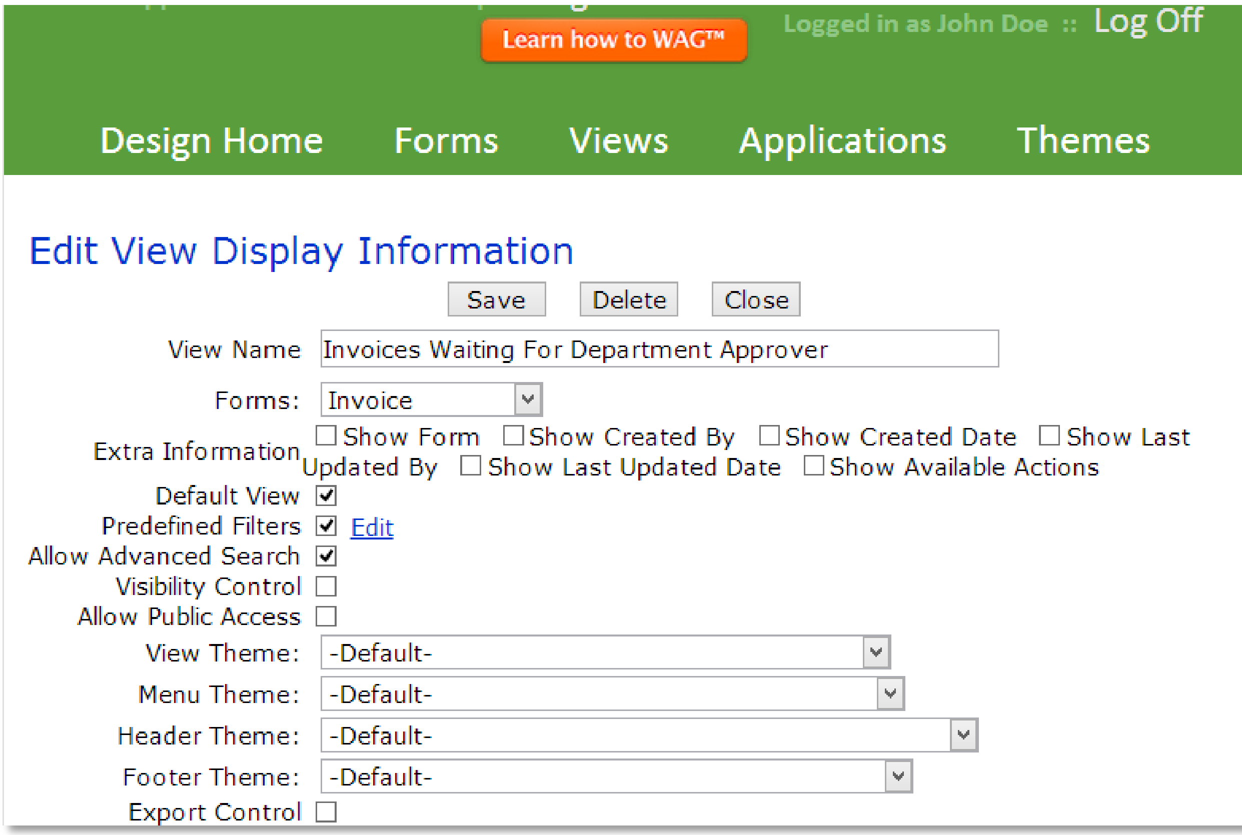
1. Click Views
2. Click Add New View
3. Type "Invoices Waiting For Department Approver" in the View Name text box
4. Select Invoices from the Type dropdown menu.
5. Check the following boxes under "Show In View":

- Invoice Number
- Payment Due Date
- Invoice Total
- Approver Name
- Approver Email

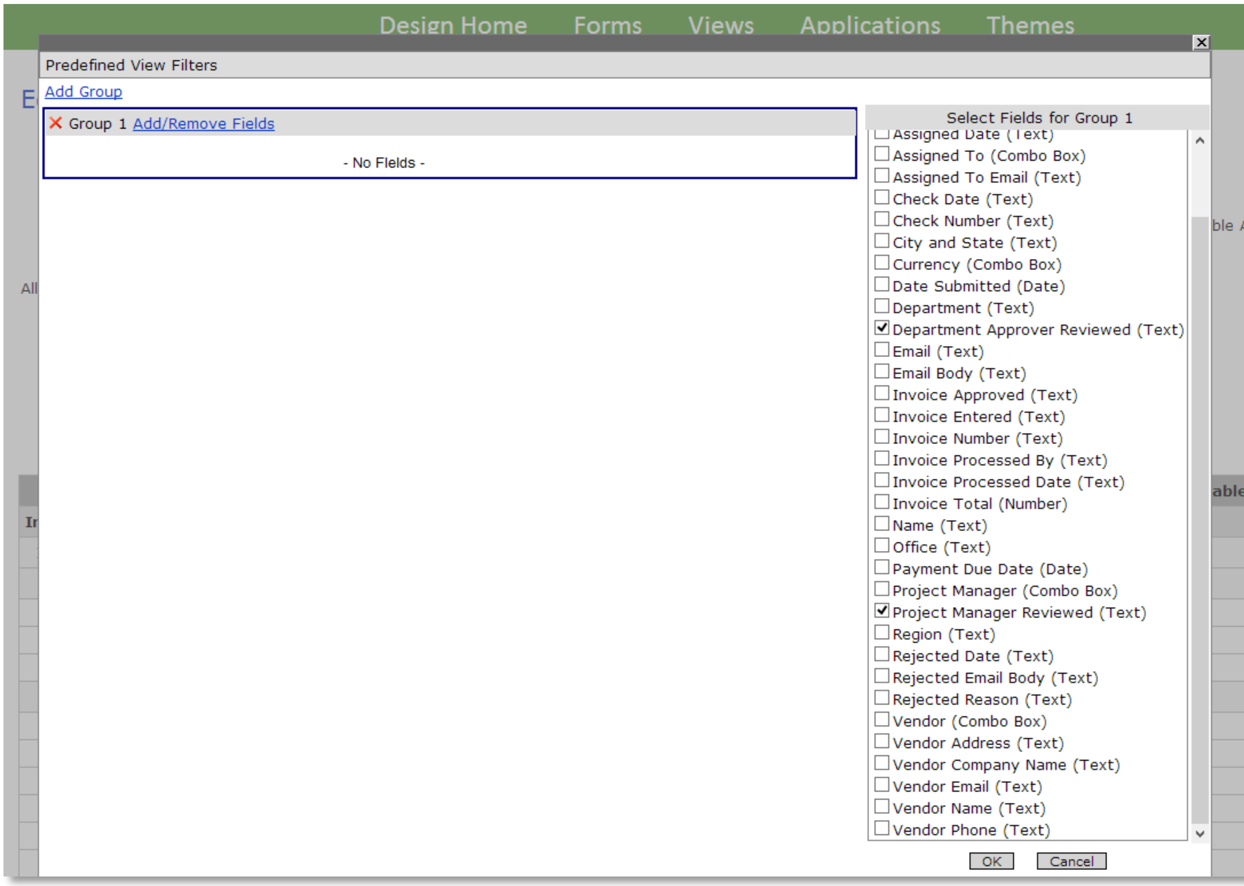
6. Select Invoice Number as the Default Search
7. Click Save.
8. Click Back.


Learn how to WAG™
Logged in as John Doe :: Log Off
Design Home
Forms
Views
Applications
Themes
Save
Cancel
View Name: Invoices Waiting For Department Approver
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*
Payment Due Date
Currency
Vendor Info
Vendor
Vendor Name
Vendor Address
City and State
Vendor Email
Vendor Phone
Line Items
Invoice Total
Processing
Email Body
Invoice Entered
Project Manager Reviewed
Department Approver Reviewed
Invoice Approved
Administration
Project Manager
Project Manager*
Name
Email
Department
Office
Region
Department Approver
Approver Name*
Approver Email
Approver Threshold
Document Management
Show Section Images
Submission
Date
Invoice Processing

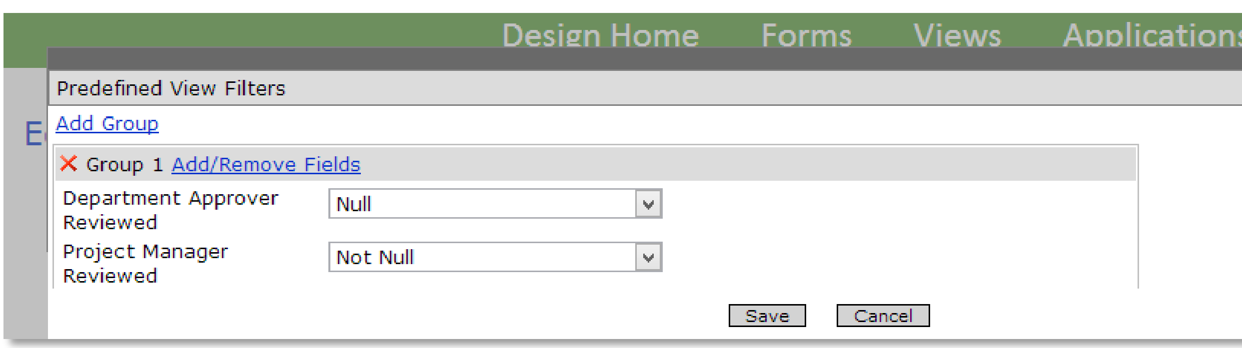

Learn how to WAG™
Logged in as John Doe :: Log Off
Design Home
Forms
Views
Applications
Themes
Edit View Definition
Add New Line
Save
Back
Field/Section Name
Show in Header
Alias
Move
Invoice Number
Payment Due Date
Invoice Total
Approver Name
Approver Email



✓ Check "Predefined Filters"



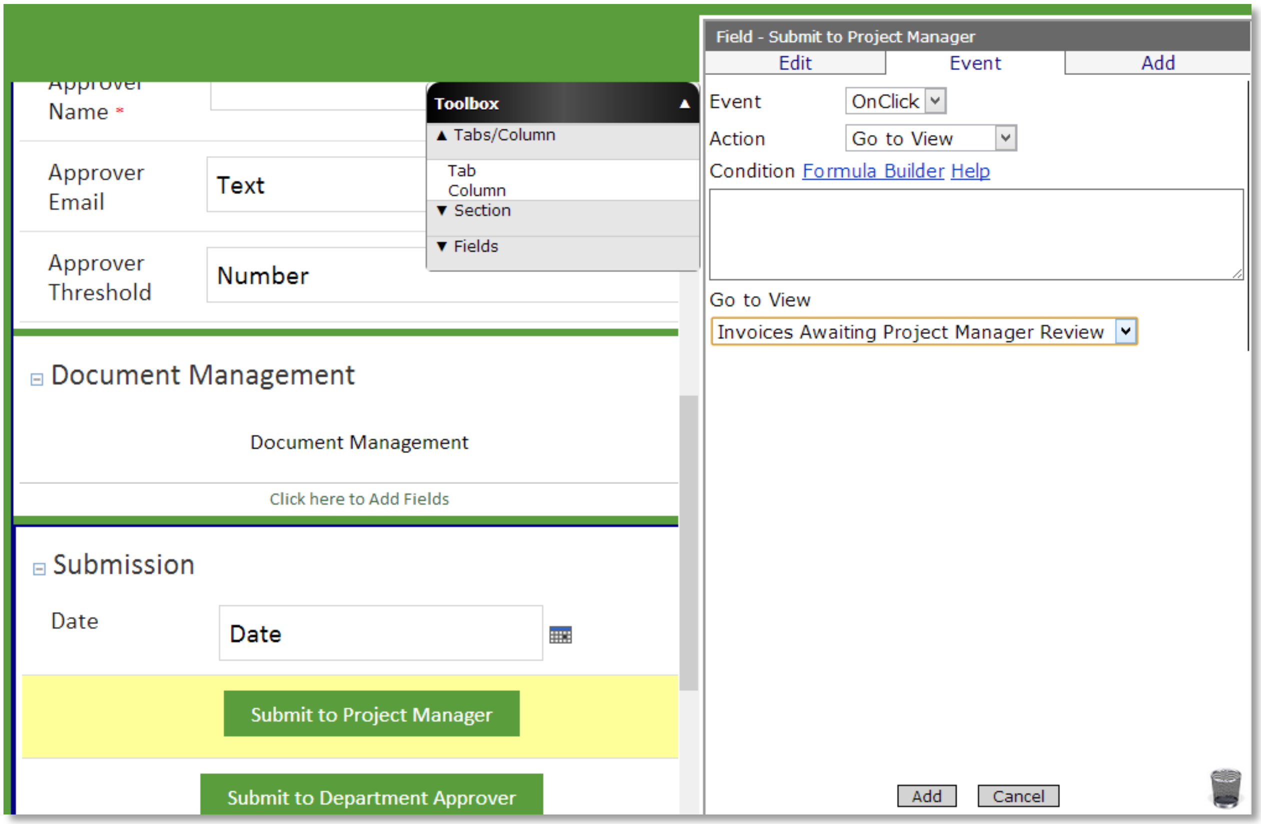
1. Check "Project Manager Reviewed" from the "Select Fields for Group 1" box.
2. Check "Department Approver Reviewed" from the "Select Fields for Group 1" box.
3. Click Ok



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.

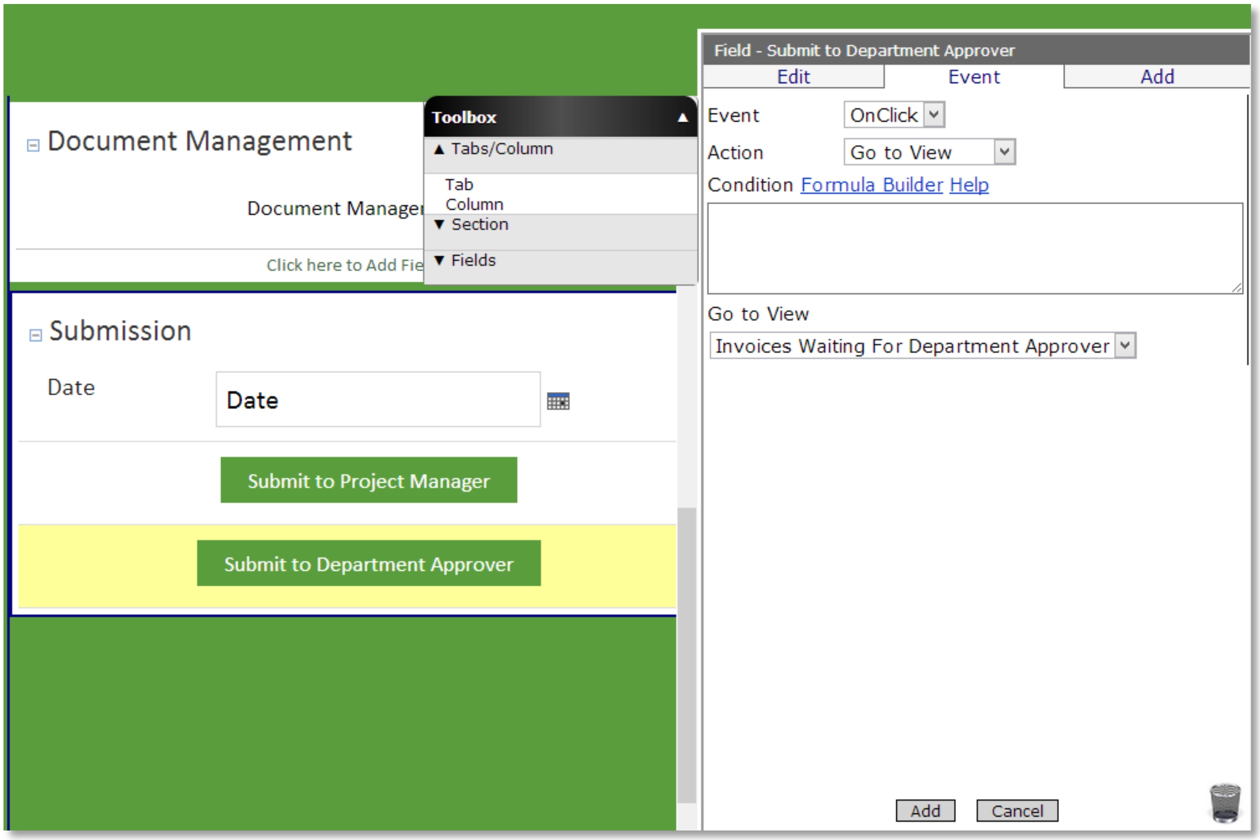
❖ Continue creating the buttons



✓ 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

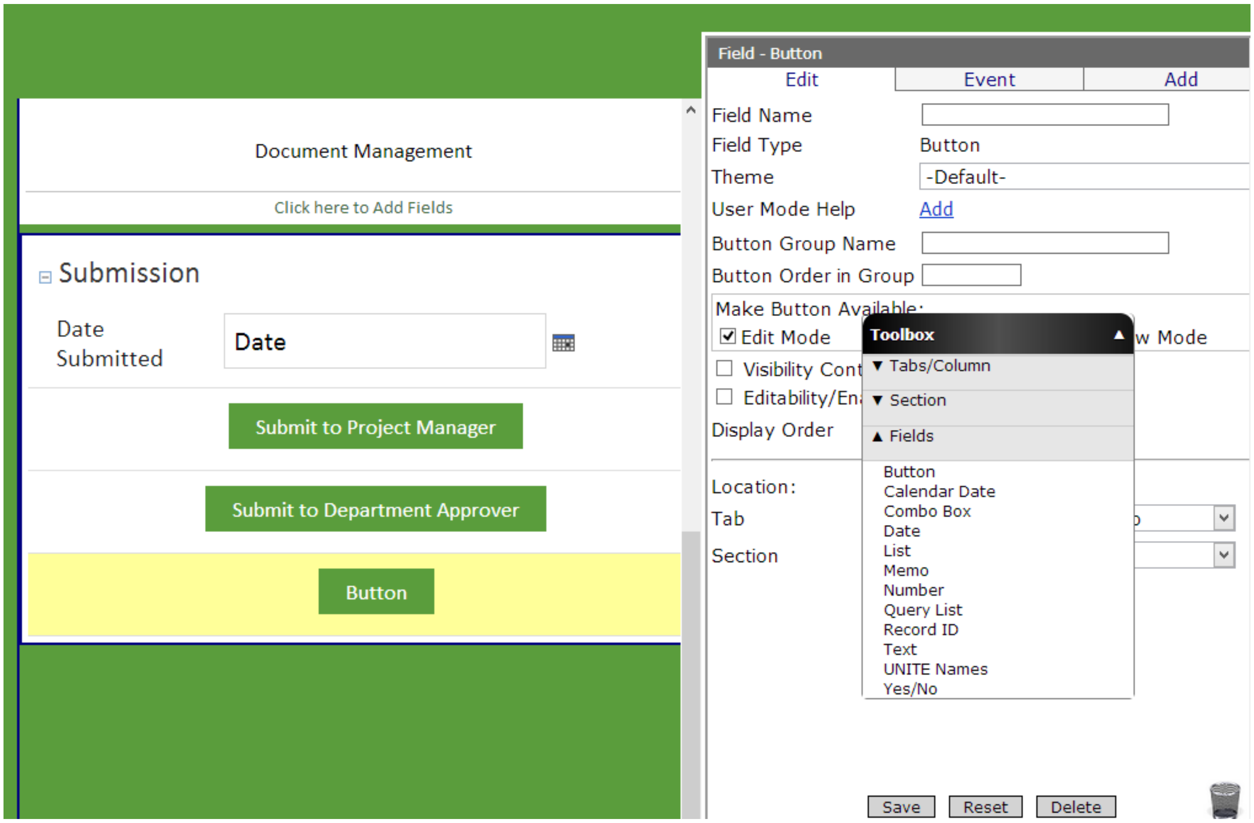
❖ Continue creating the buttons



✓ click on Submit to Department Approver

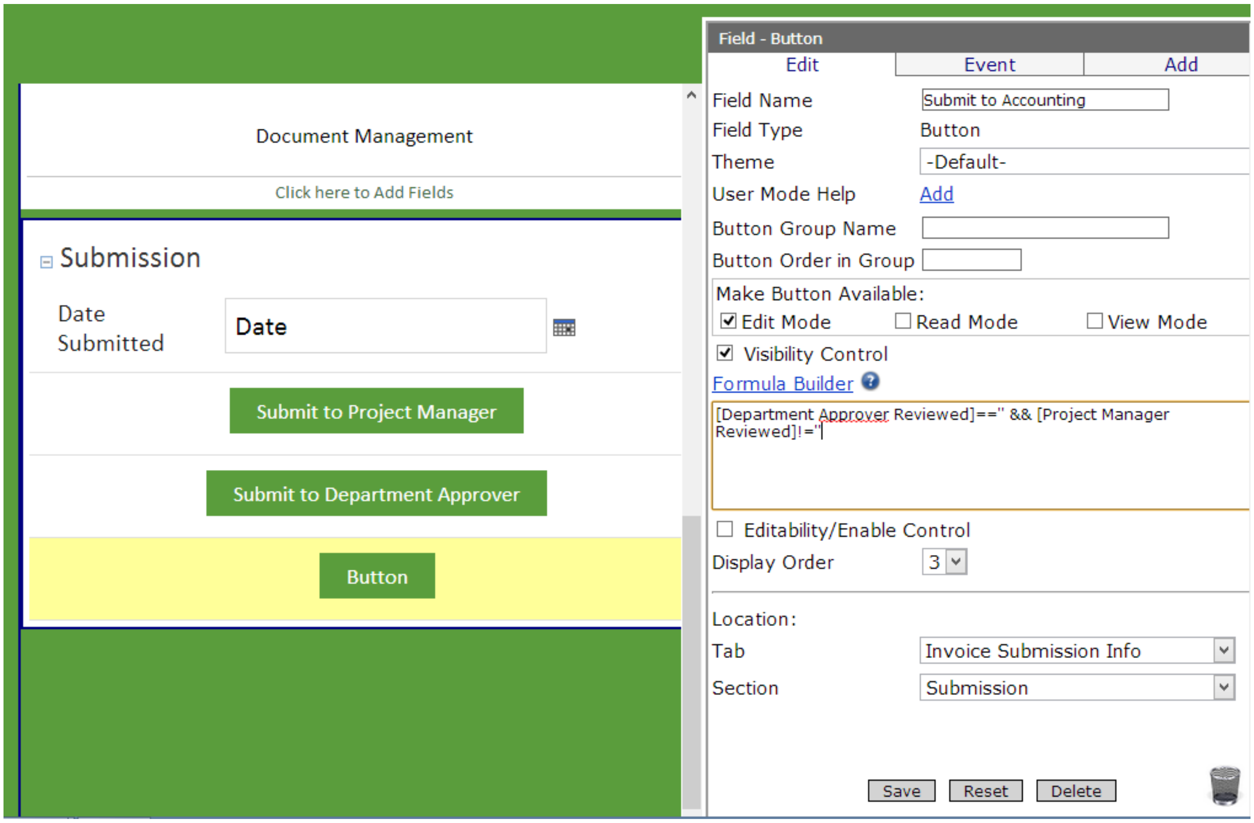
6. Click on the Event tab
7. Click on "Add New Event"
8. Select Go To View from the Action dropdown menu
9. Select "Invoices waiting for Department Approver" from the Go to View dropdown menu
10. Click Add

❖ Create Button named Submit to Accounting

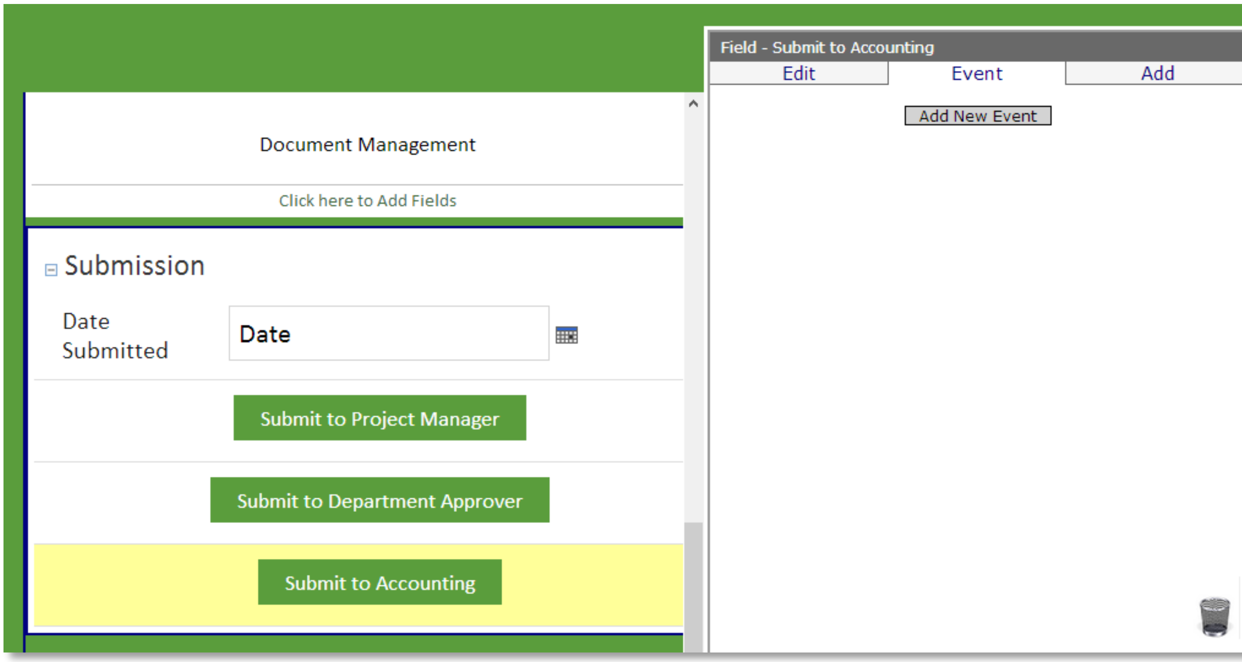


✓ Drag and Drop a Button field from the toolbox beneath the Submit to Department Approver button.

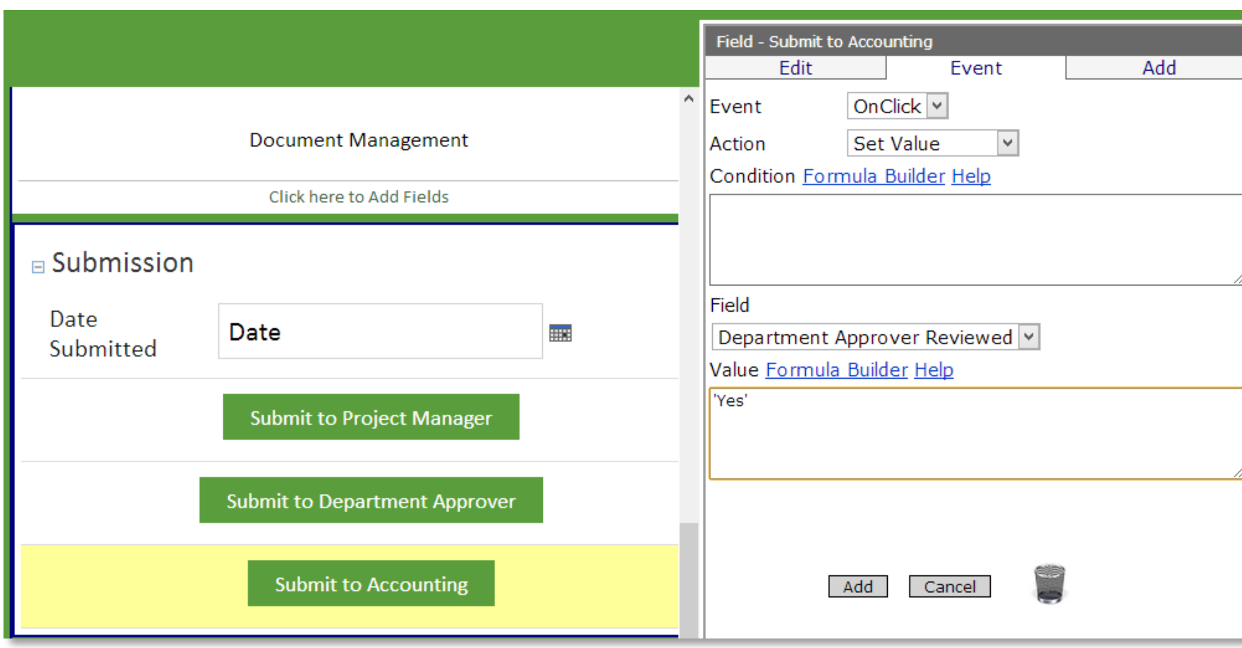
❖ Name the button



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

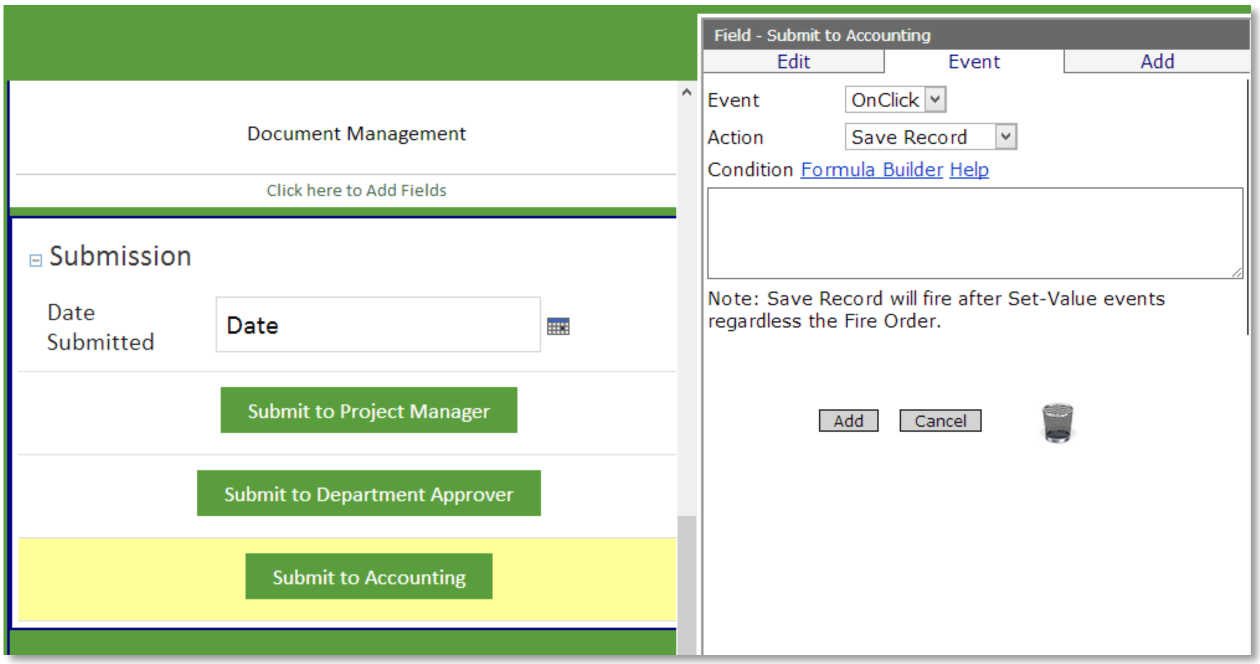


✓ Click Add New Event



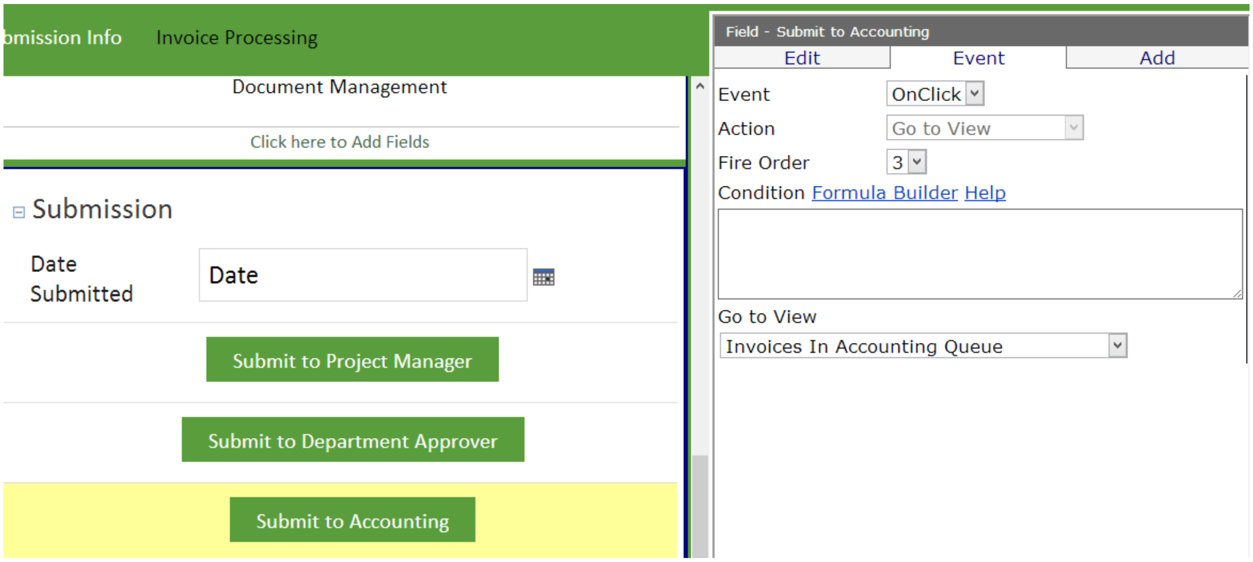
1. In the Action drop down list choose *Set Value*
2. In the Field drop down list choose *Department Approver Reviewed*
3. In the Value formula box type *'Yes'* and click *Add*

✓ Click Add new Event



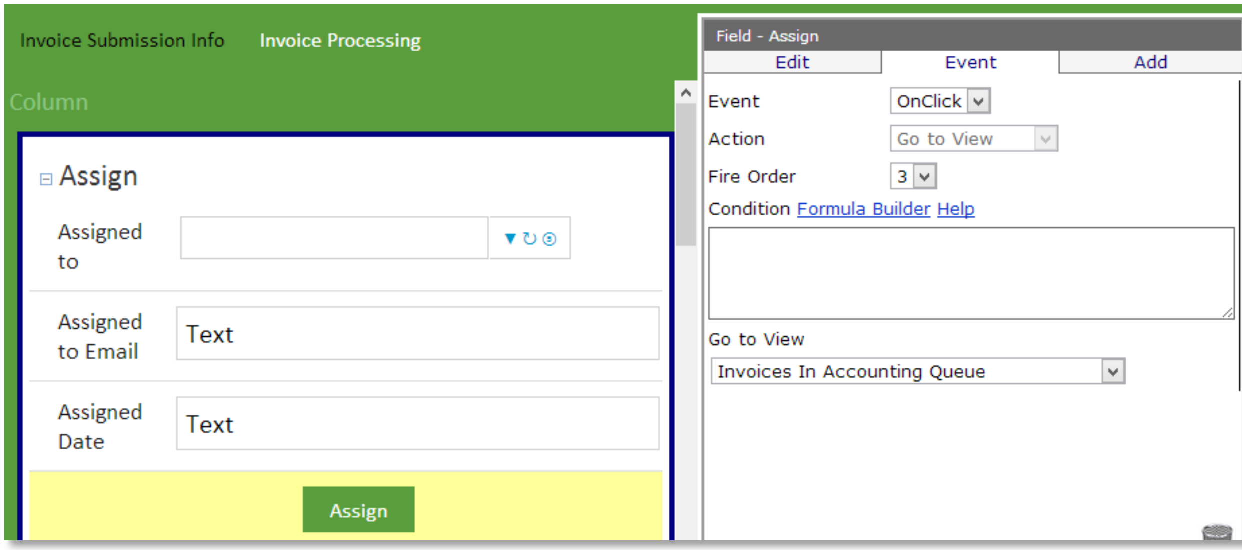
1. In the Action drop down list choose *Save Record*
2. Click *Add*.

❖ Click add New Event

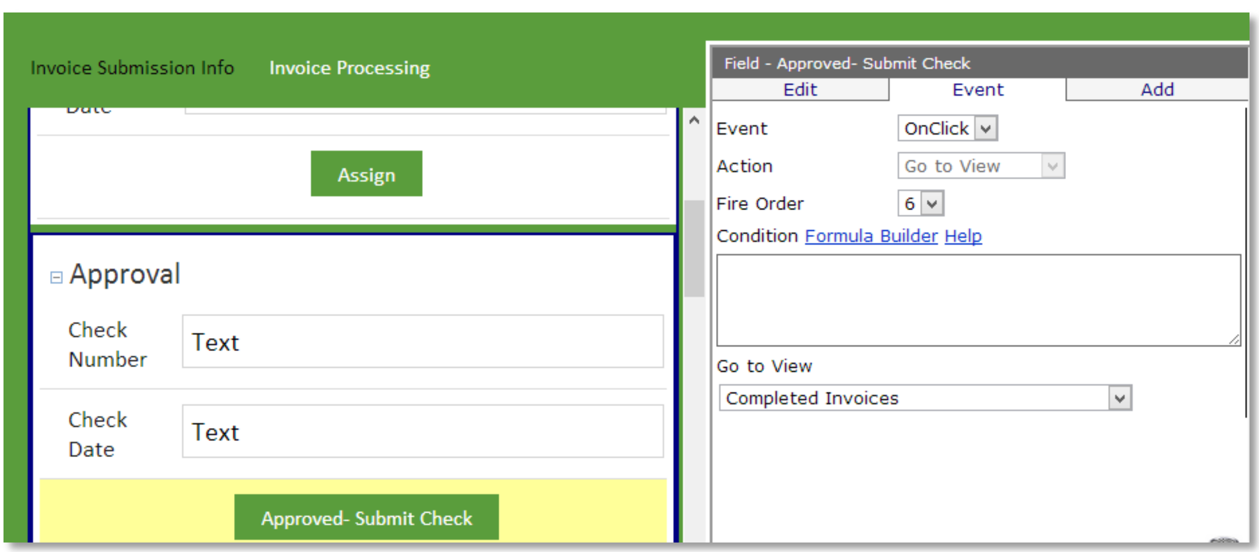


1. In the Properties box Action drop down list choose go to view
2. Go to view drop down list choose Invoices in Accounting Queue
3. Click Add

❖ Click on the tab Invoice Processing



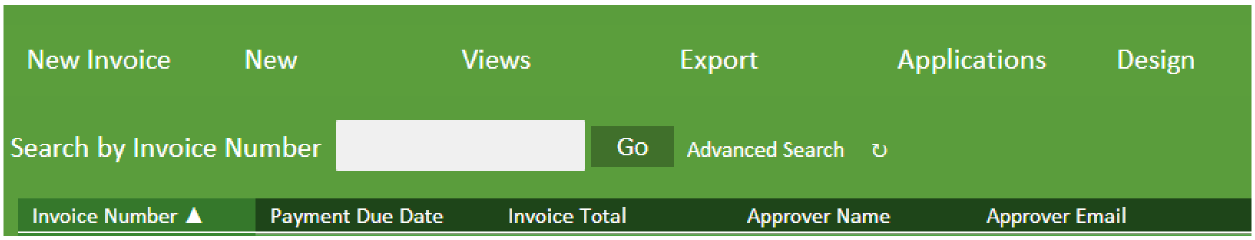
11. Click on the Button named "Assign"
12. Click on the Event tab
13. Click on "Add New Event"
14. Select Go To View from the Action dropdown menu
15. Select "Invoices in Accounting Queue" from the Go to View dropdown Click Add



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

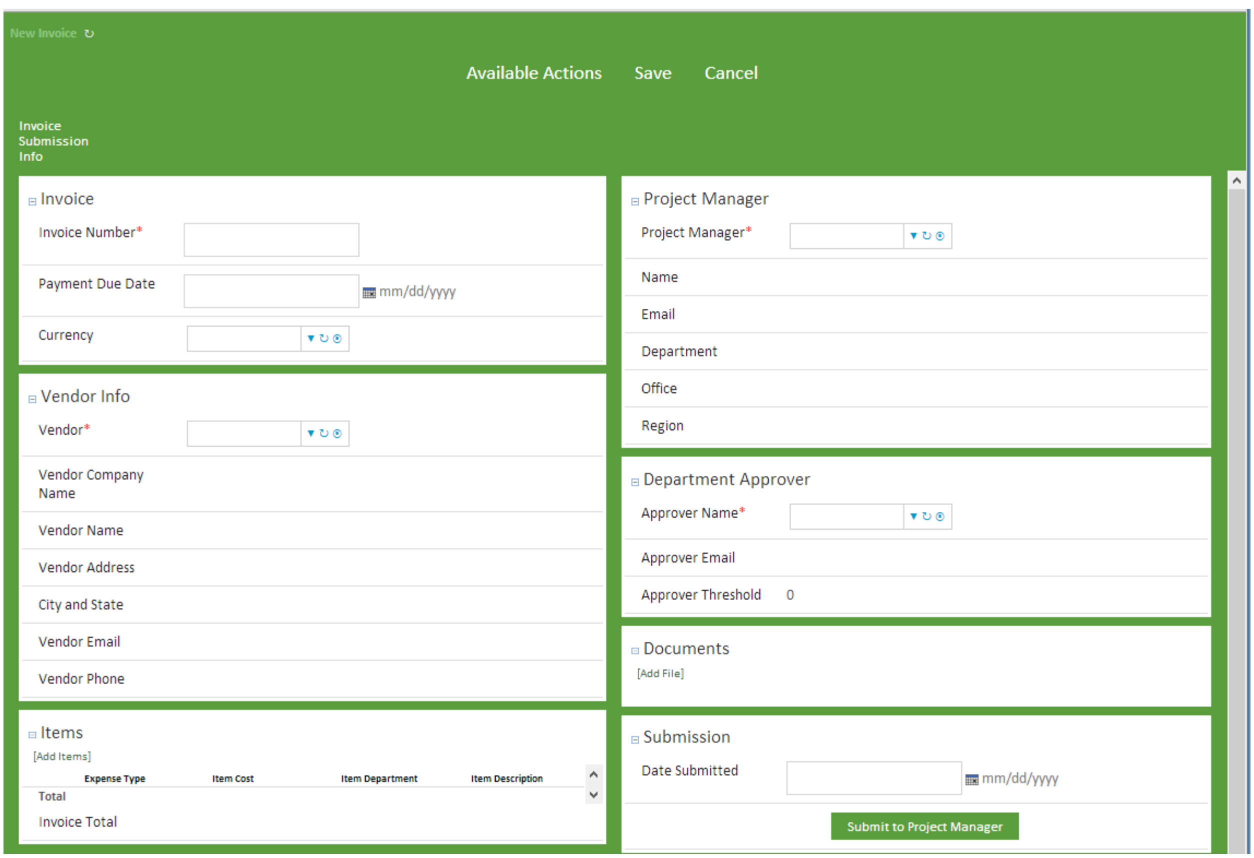
❖ User Mode

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.

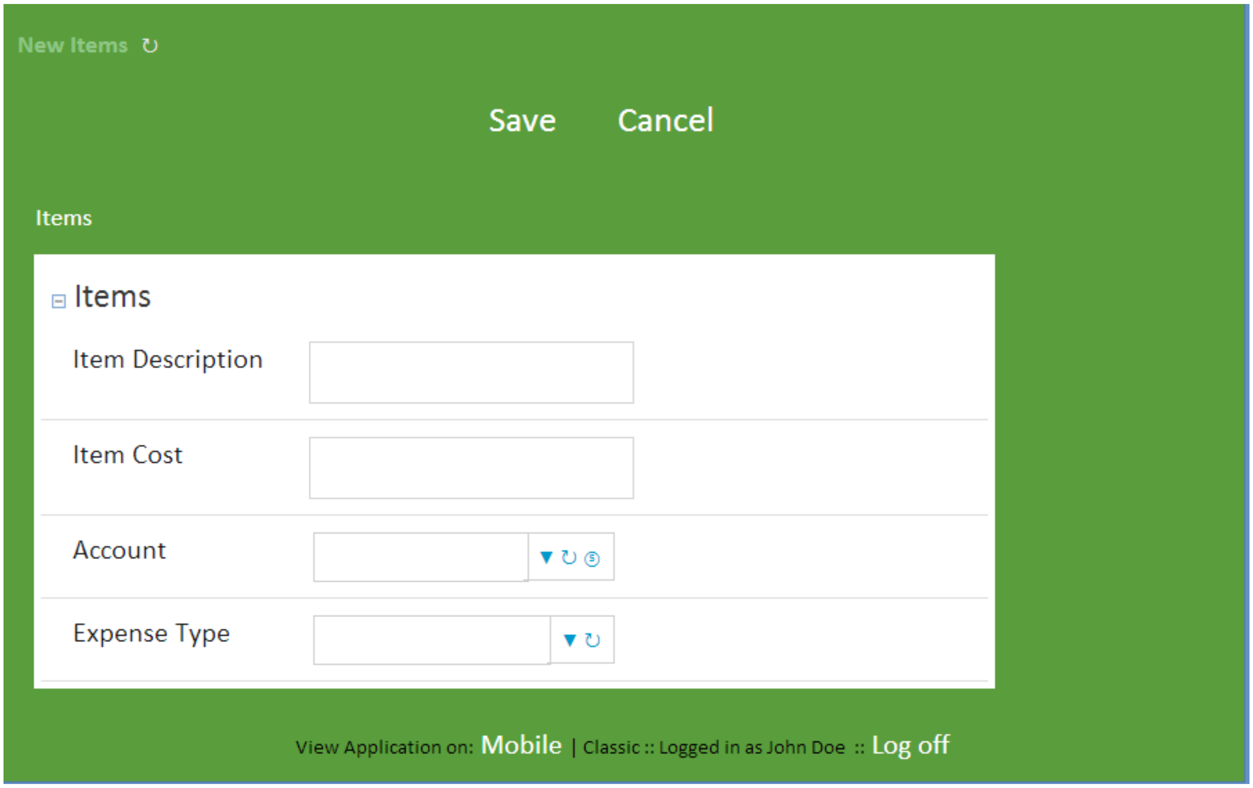


Enter the Data from the tables below.

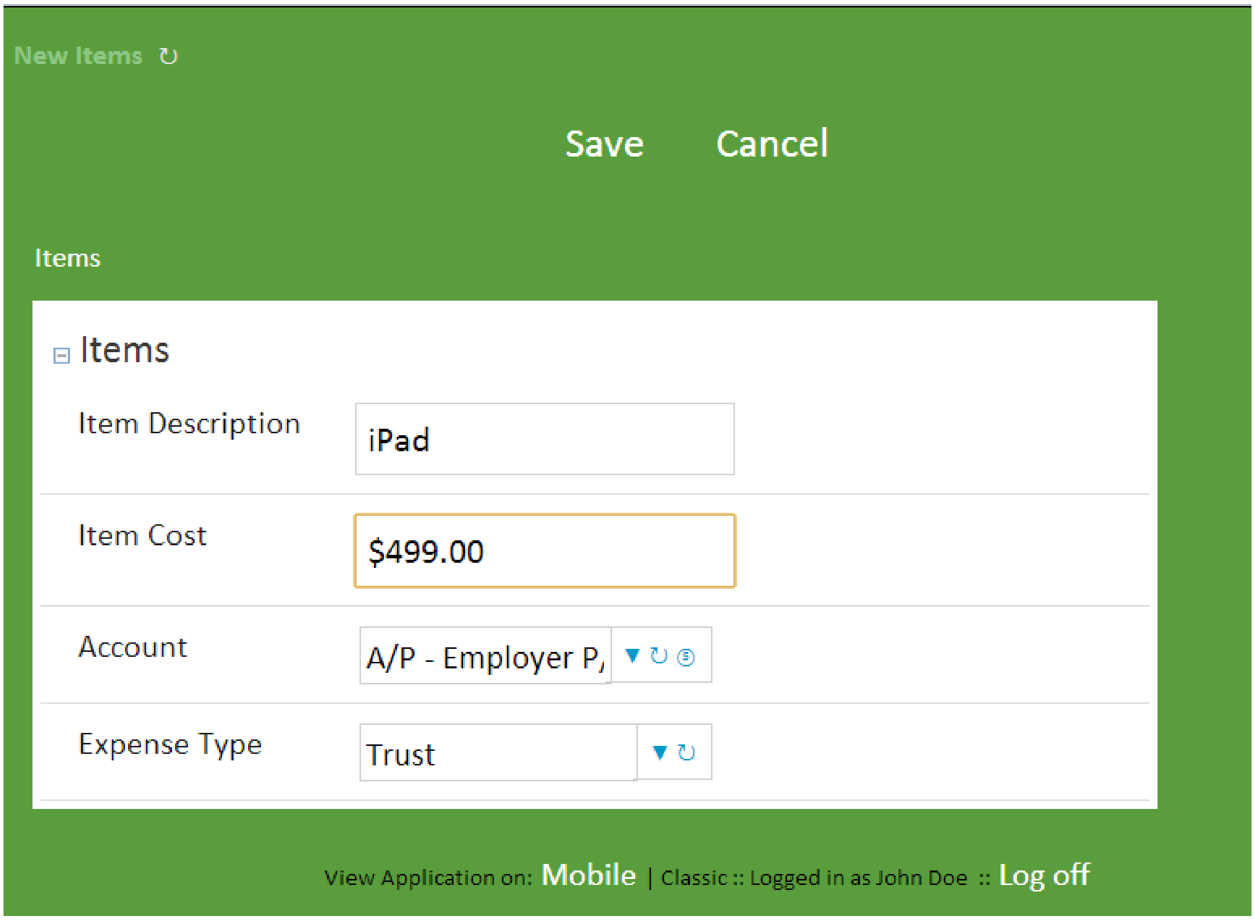
Invoice Info	
Invoice Number	555
Payment Due Date	Choose the date from the calendar
Currency	Choose USD from the drop down list

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



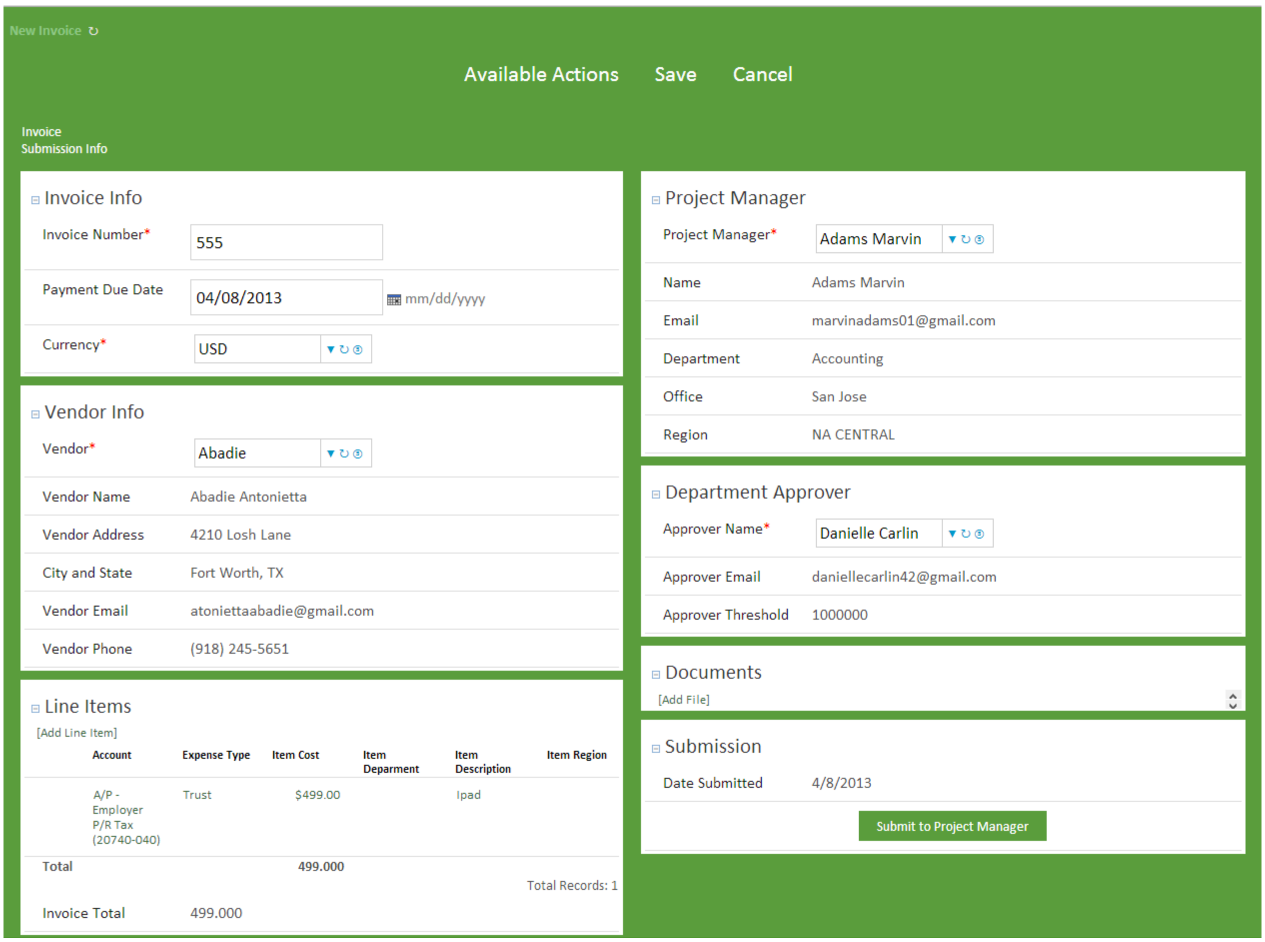
Items	
Item Description	IPad
Item cost	$499
Account	Select a/P –Employer P/R Tax (20740-040)
Expense Type	Select trust



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

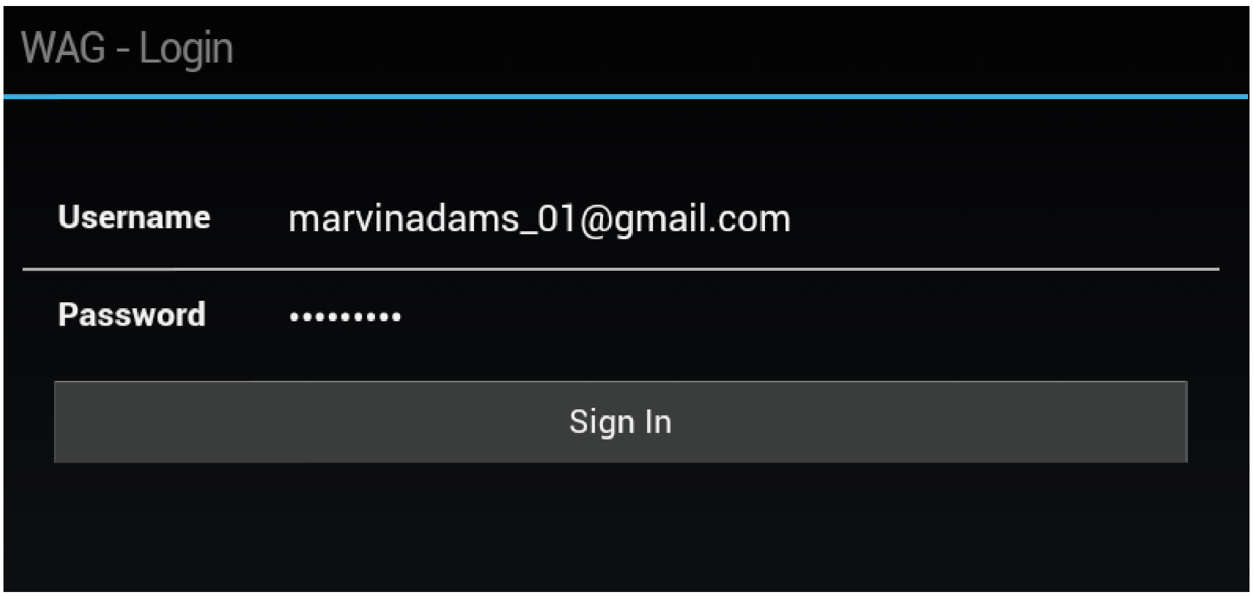
Attach document if needed and click on the button Submit to Project Manager.



- ✓ Click On Submit to Project Manager.

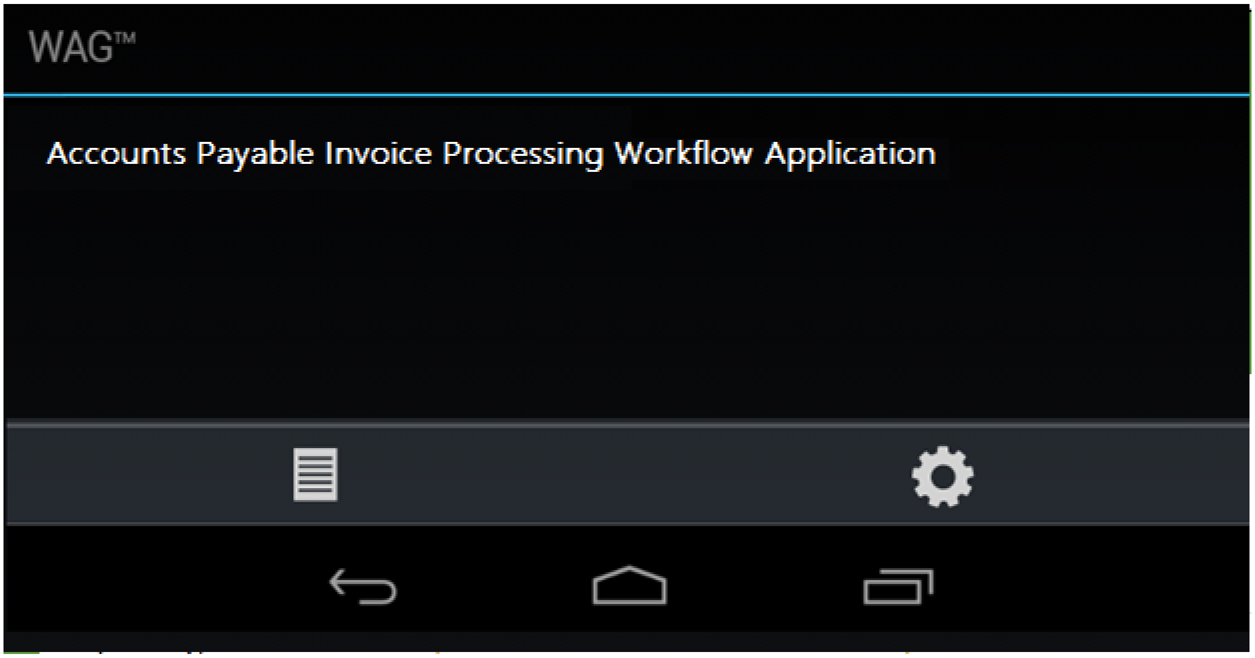
User Mode on Android.

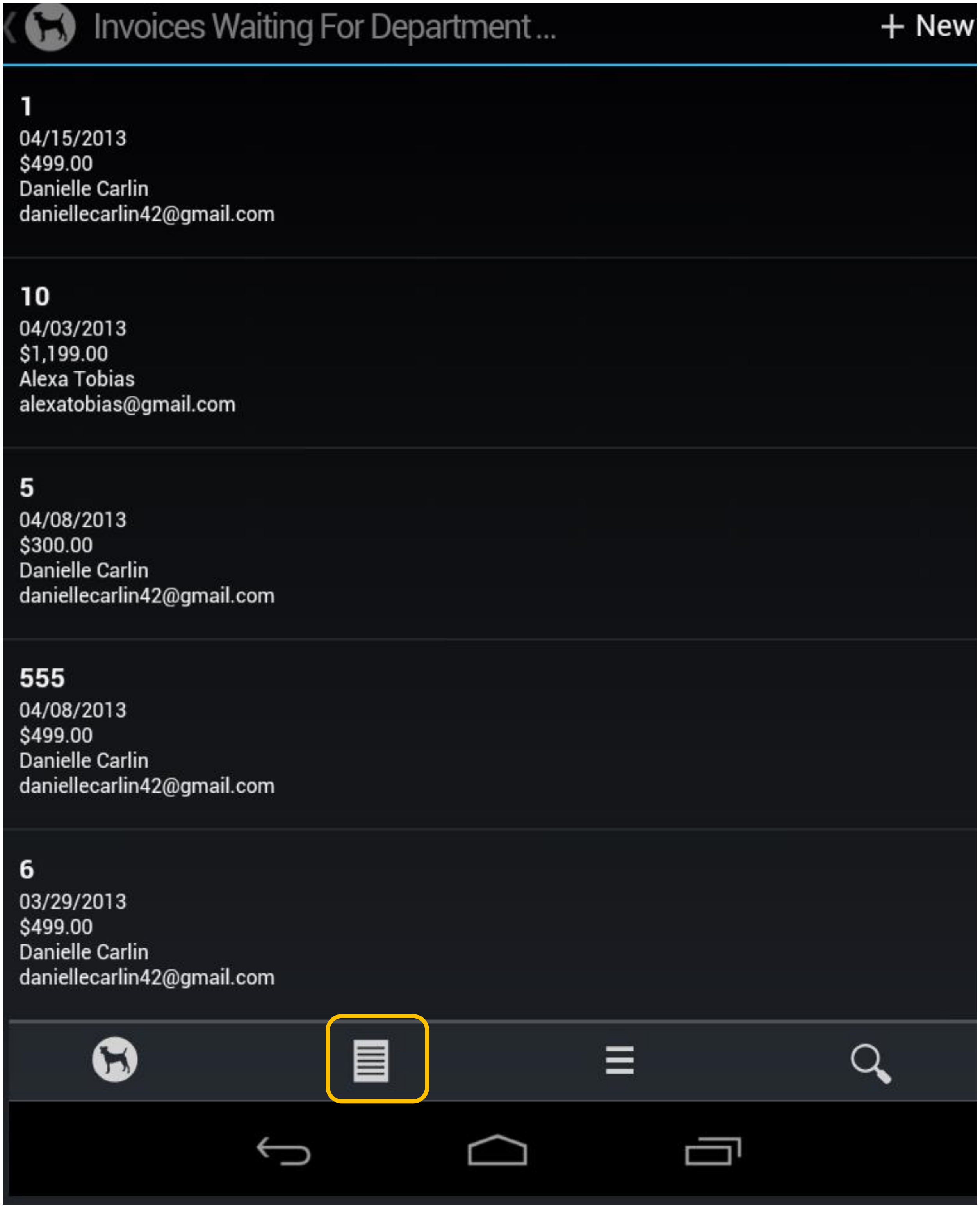
❖ Project Manager sees that there is an Invoice Submitted for his review and logs in to his account with Android and Assignes the Invoice to Department Approver.



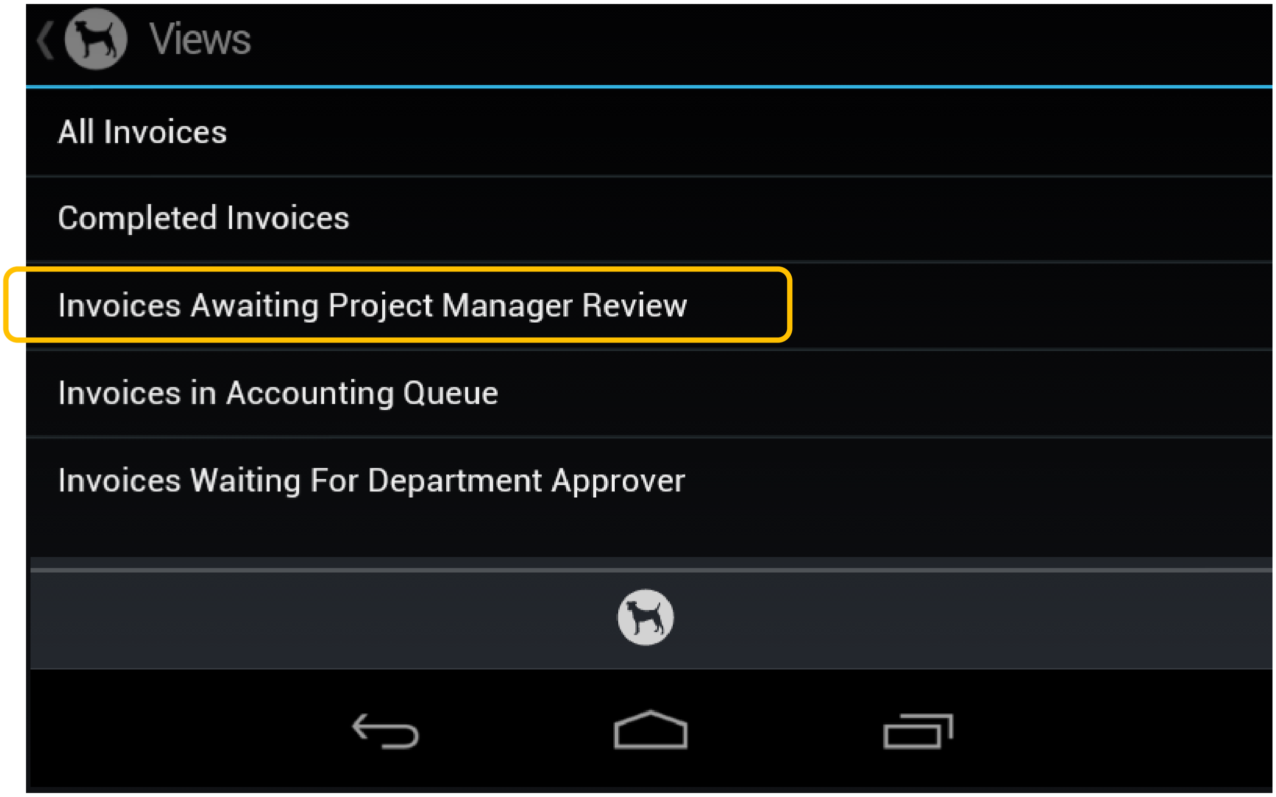
Once the project Manager logs in with his credentials to his WAG Account , clicks on

Accounts Payable Invoice Processing Workflow Application

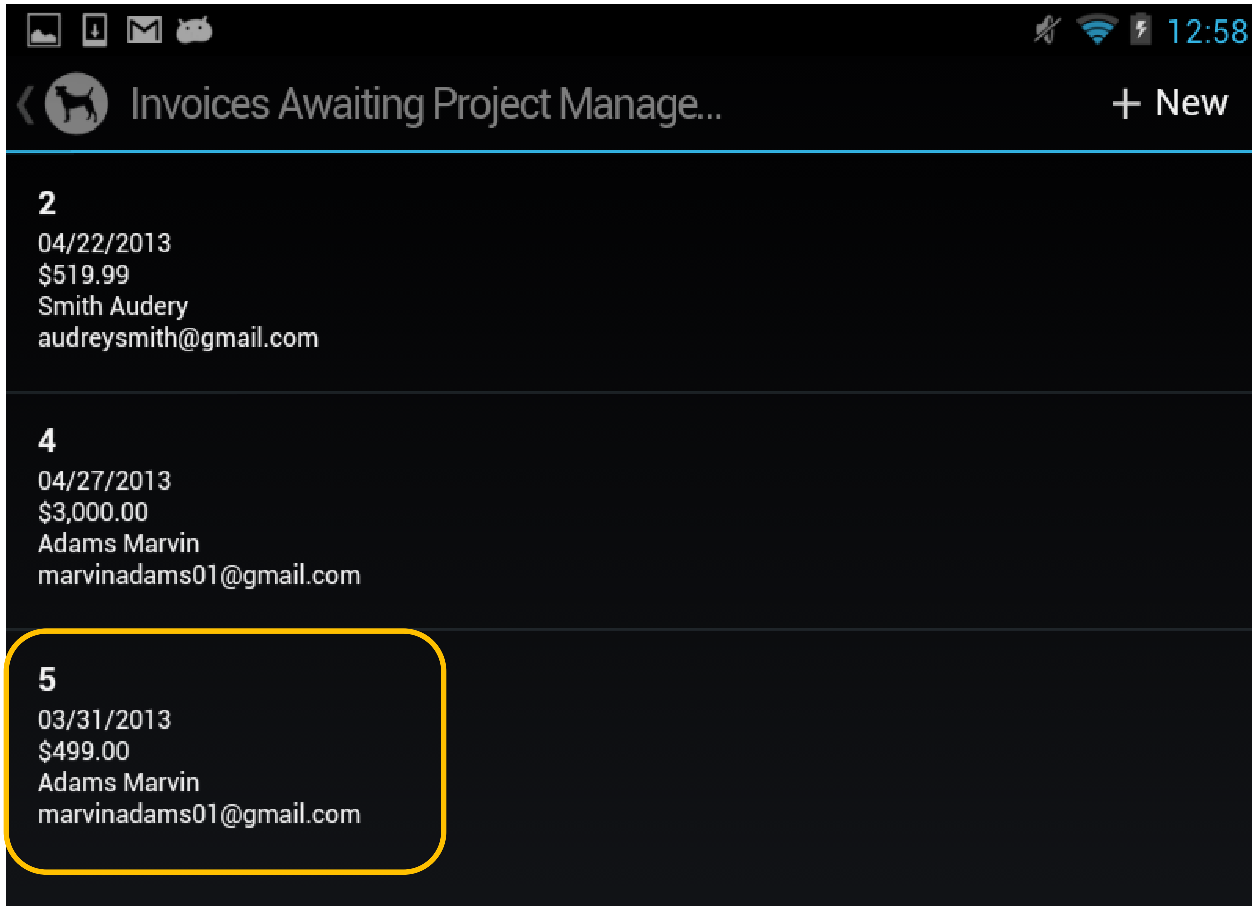

WAG™
Accounts Payable Invoice Processing Workflow Application



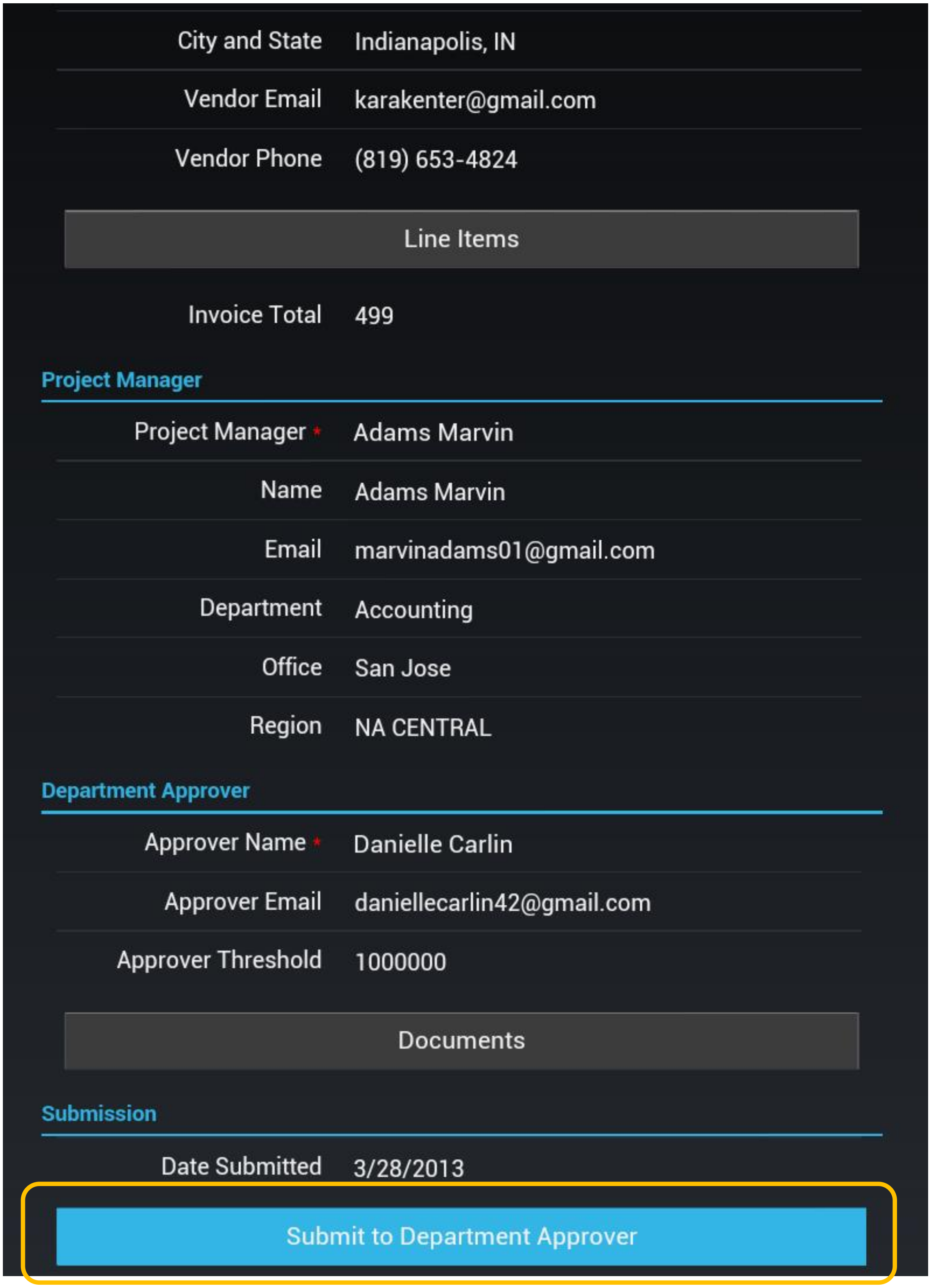
- ✓ Clicks on Views



- ✓ Clicks on Invoices Awaiting for Project Manager review



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

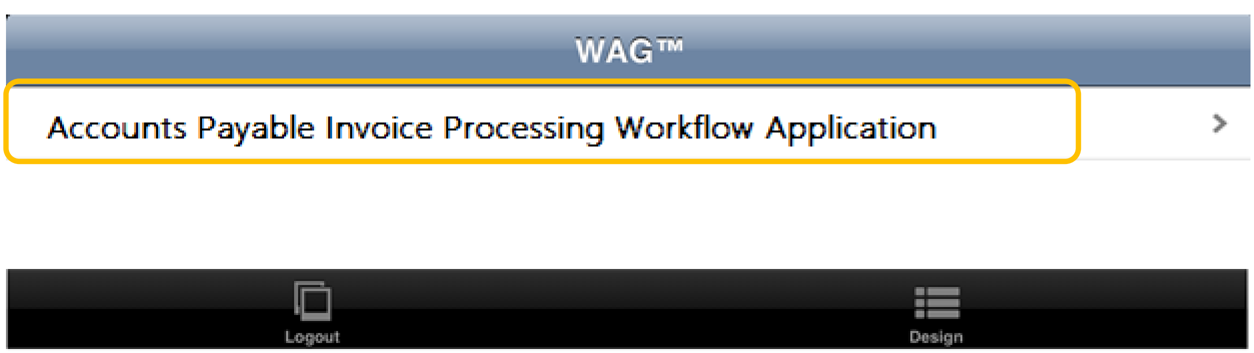

City and State Indianapolis, IN
Vendor Email karakenter@gmail.com
Vendor Phone (819) 653-4824
Line Items
Invoice Total 499
Project Manager
Project Manager * Adams Marvin
Name Adams Marvin
Email marvinadams01@gmail.com
Department Accounting
Office San Jose
Region NA CENTRAL
Department Approver
Approver Name * Danielle Carlin
Approver Email daniellecarlin42@gmail.com
Approver Threshold 1000000
Documents
Submission
Date Submitted 3/28/2013
Submit to Department Approver

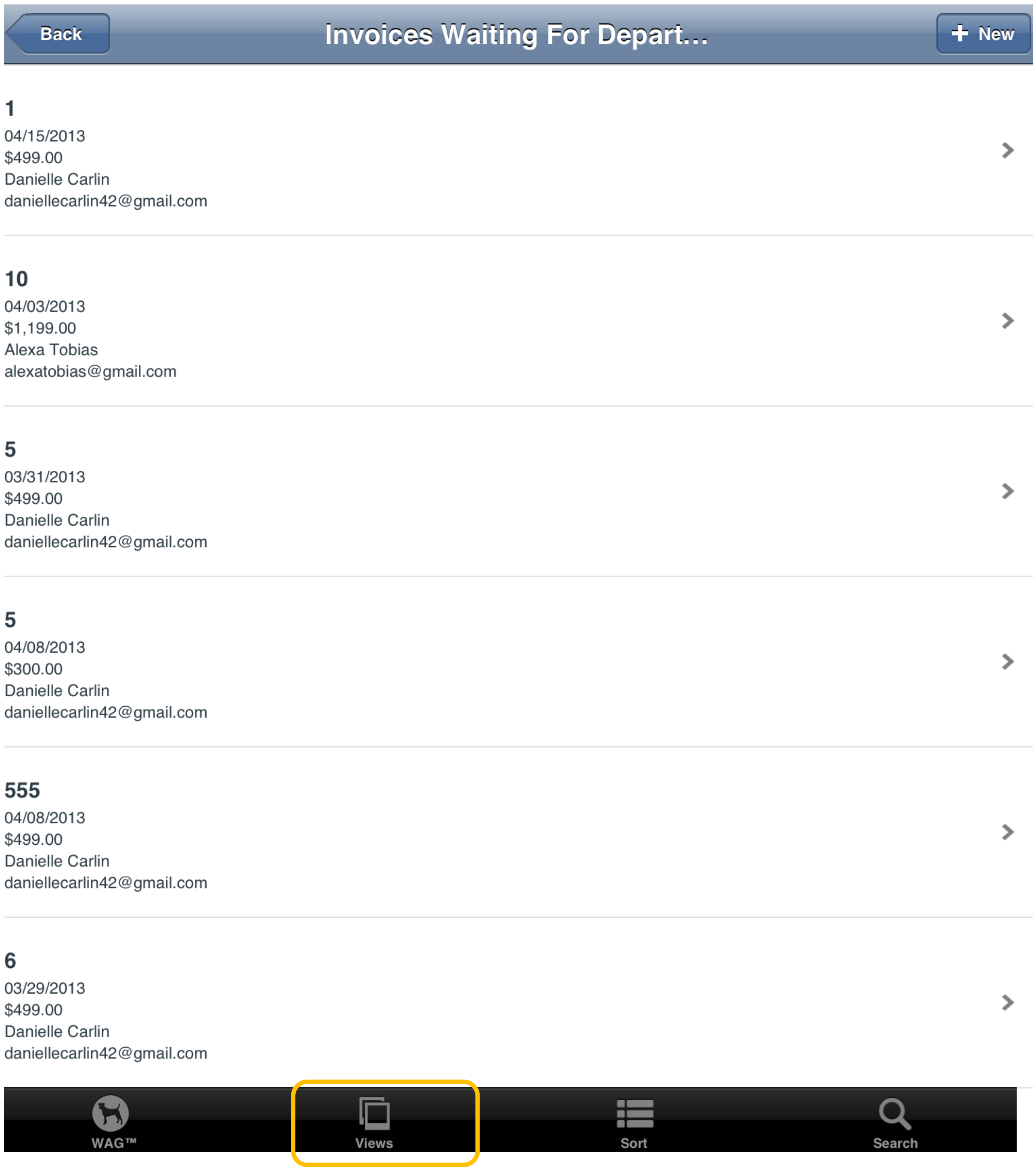
And Submits it to Department Approver by clicking Submit to Department Approver Button.

❖ User Mode on iOS

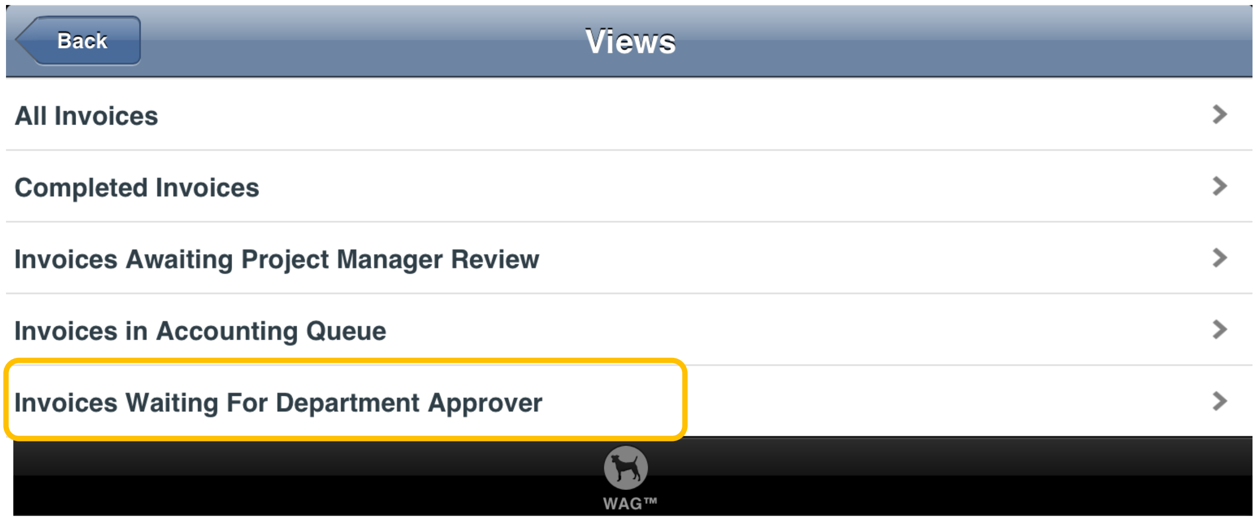
Department Approver receives an email that she has an invoice awaiting for her review and she logs in to her WAG account with her Ipad.

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

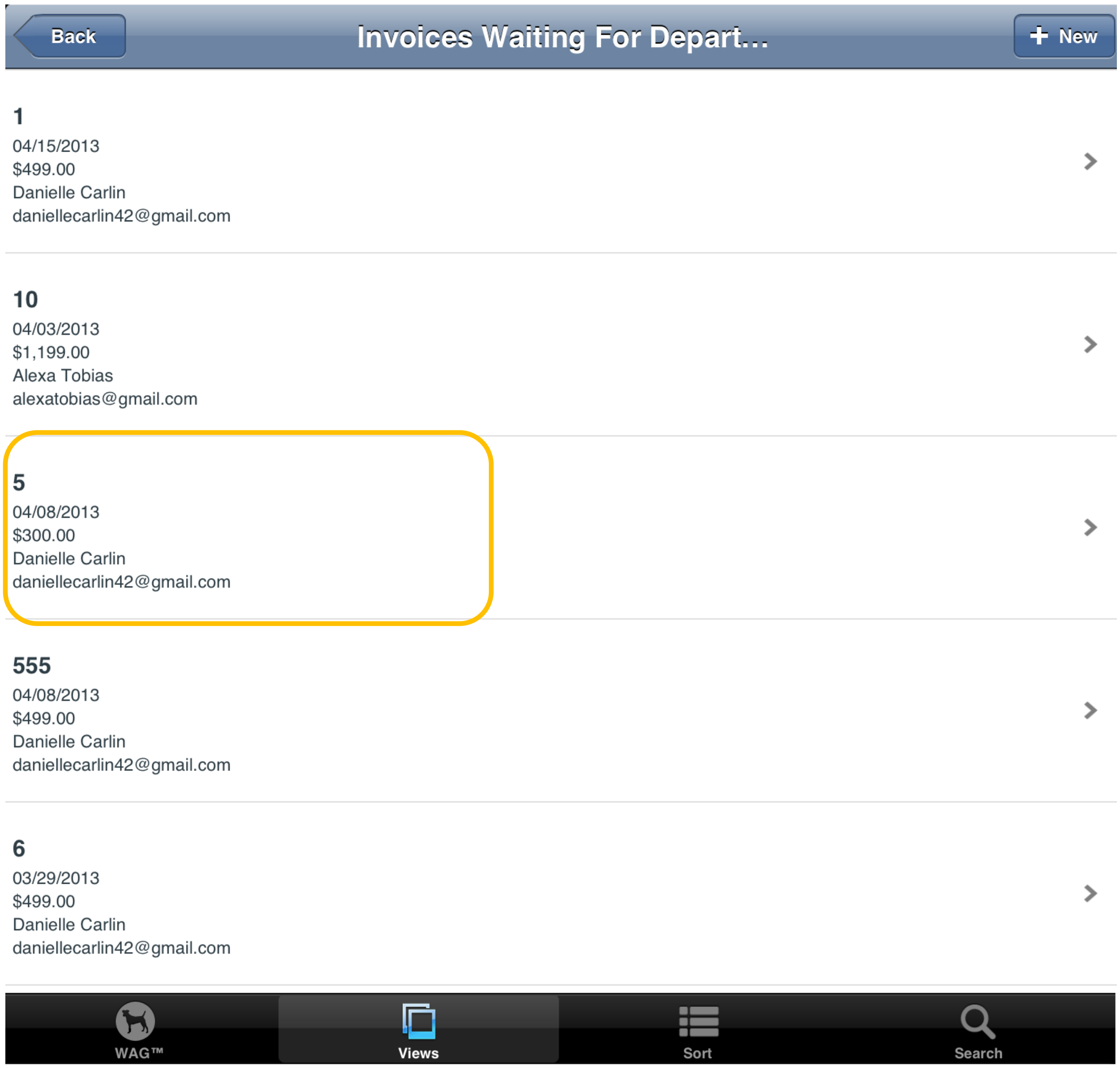




- ✓ Clicks On views



Clicks on Invoice waiting for department Approver



- ✓ 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

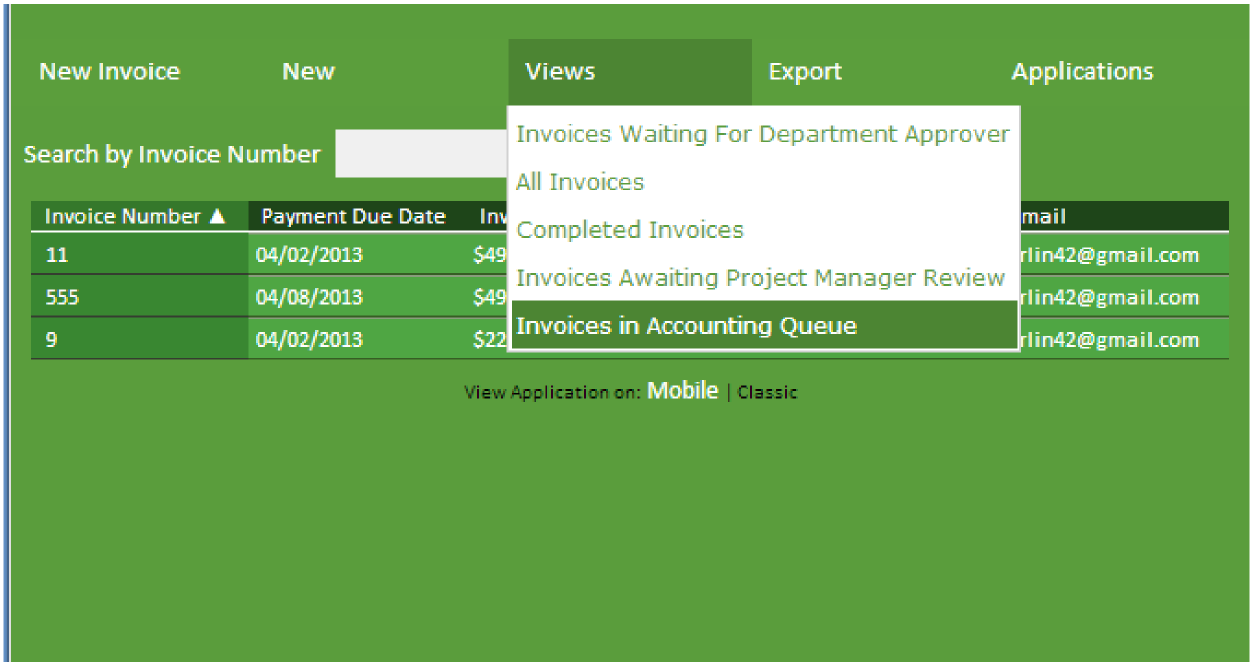
Date Submitted	3/28/2013

Submit to Accounting

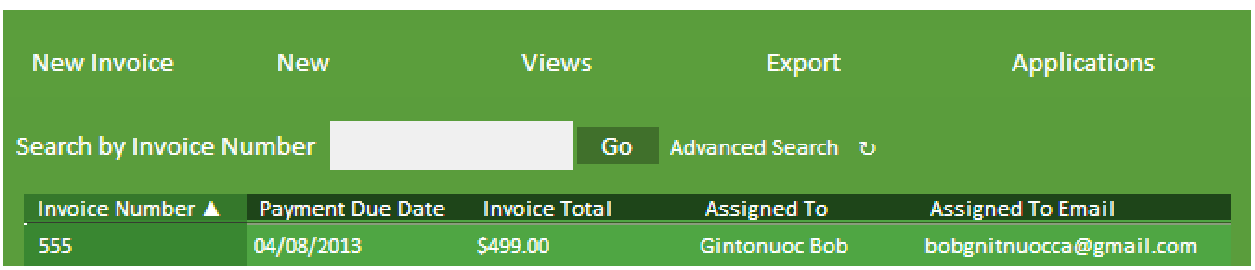
- ✓ Clicks on Submit to Accounting

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.

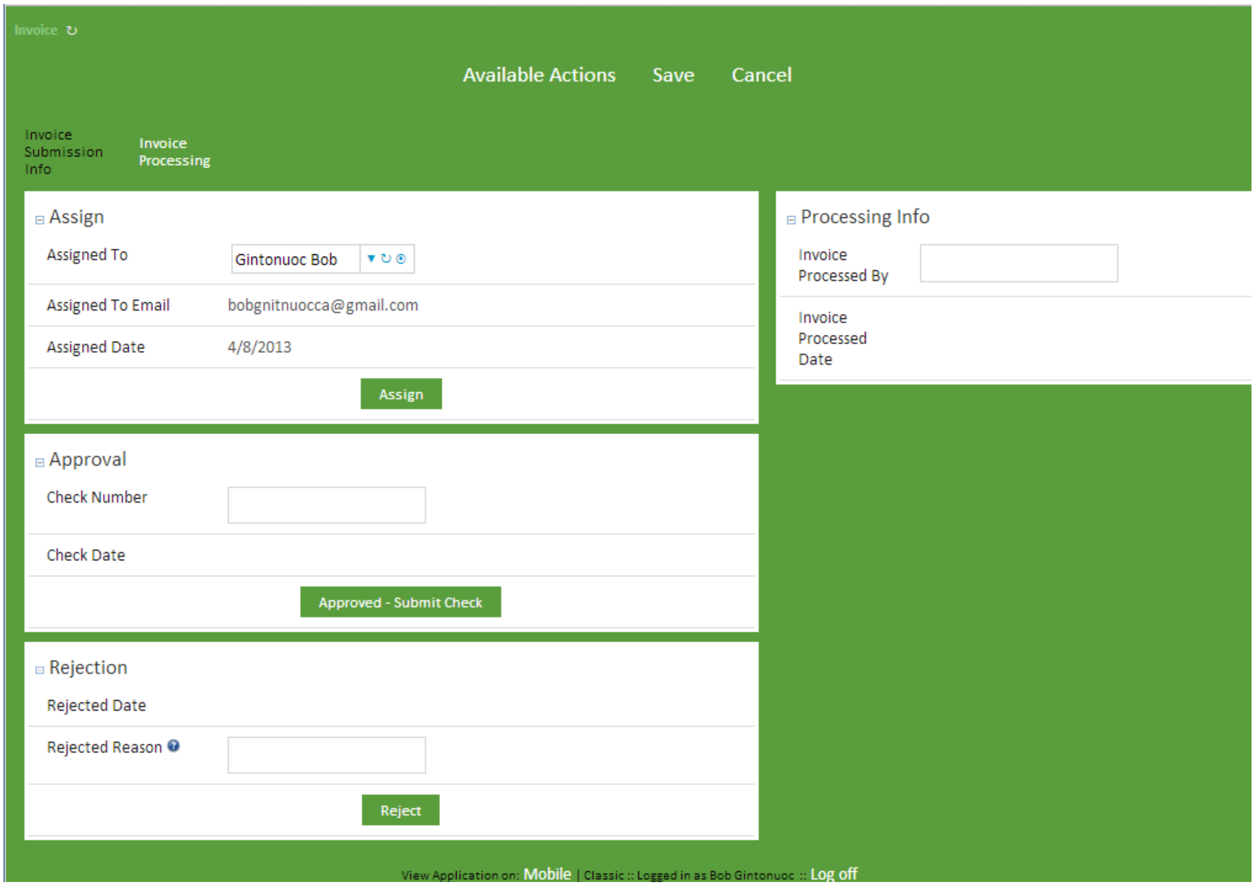
He clicks on Views and "Invoices in Accounting Queue".



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.



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/webappgenerator.

\- The End -