

Li Fitzmaurice

From: Li Fitzmaurice
Sent: Friday, 10 November 2023 2:10 PM
To: Li Fitzmaurice
Subject: FW: new features multiple companies

Major improvements to custom worktasks.

You can create a new task and add it to the workflow. Customers can create their own worktasks. I have added samples etc. They can then add these tasks to the workflow.

Choose a Task ▼

New Task

Create/Edit Task

Create/Edit your own Tasks and add these to your workflow. EzzyBills will call your task (via webhook). When your task completes API, and the workflow will proceed to the next task. This mechanism can be used to implement your own approval system, custom

Create/Edit New Task

Task Settings

Name:

New Task

Description:

Webhook:

Create New Task

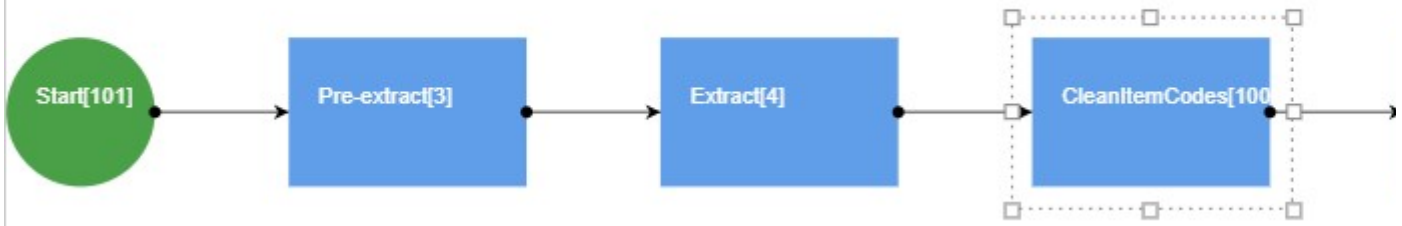
Here is a list of custom tasks created by EzzyBills

[EzzyBills Custom Worktasks \(Swagger\)](#)

If you would like your Tasks to be accesable to other EzzyBill users then become an EzzyBills App partner. Contact Support@ezzy

Eg. I created a worktask "CleanItemCodes" and added to the workflow.

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This worktask is implemented by calling a webhook 'https://tasks.ezzydoc.com/Worktask/TASK_CleanItemCodes'
This worktask trims all non alph numeric values from the item codes.

Create/Edit your own Tasks and add these to your workflow. EzzyBills will call your task (via webhook). When your task completes API, and the workflow will proceed to the next task. This mechanism can be used to implement your own approval system, custom

Create/Edit New Task

Task Settings

Name:

Description:

Webhook:

Save Task

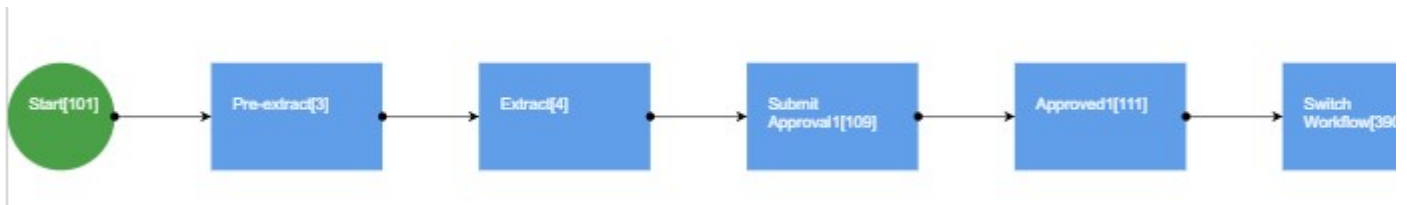
Ezzybills- support multiple entities

If you have multiple companies/entities and you want to upload to one ezzybills account and then switch to the correct entity then you should use the following approach.

- 1) Upload to your many ezzybills account.
- 2) Set single level approval as default.



Then create a switch workflow for each of your other entities.



In switch worktask set the ezzybills account for the company you want to switch to.

Setting:

```

{
  "state": 390,
  "keywords": [
    {
      "name": "userName",
      "value": "ezzynz"
    },
    {
      "name": "changeWorkflow",
      "value": "xero export"
    }
  ]
}
  
```

Create a 'xero export' workflow in this other account



Now upload the bill and during approval choose the entity to switch to. EzzyBills will now switch the correct company and export bill.

Job Tracking:

Enter Tracking

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Workflow:

XEROBILLS APPROVE

Attach File...

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Change Workflow:

switch Company2

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