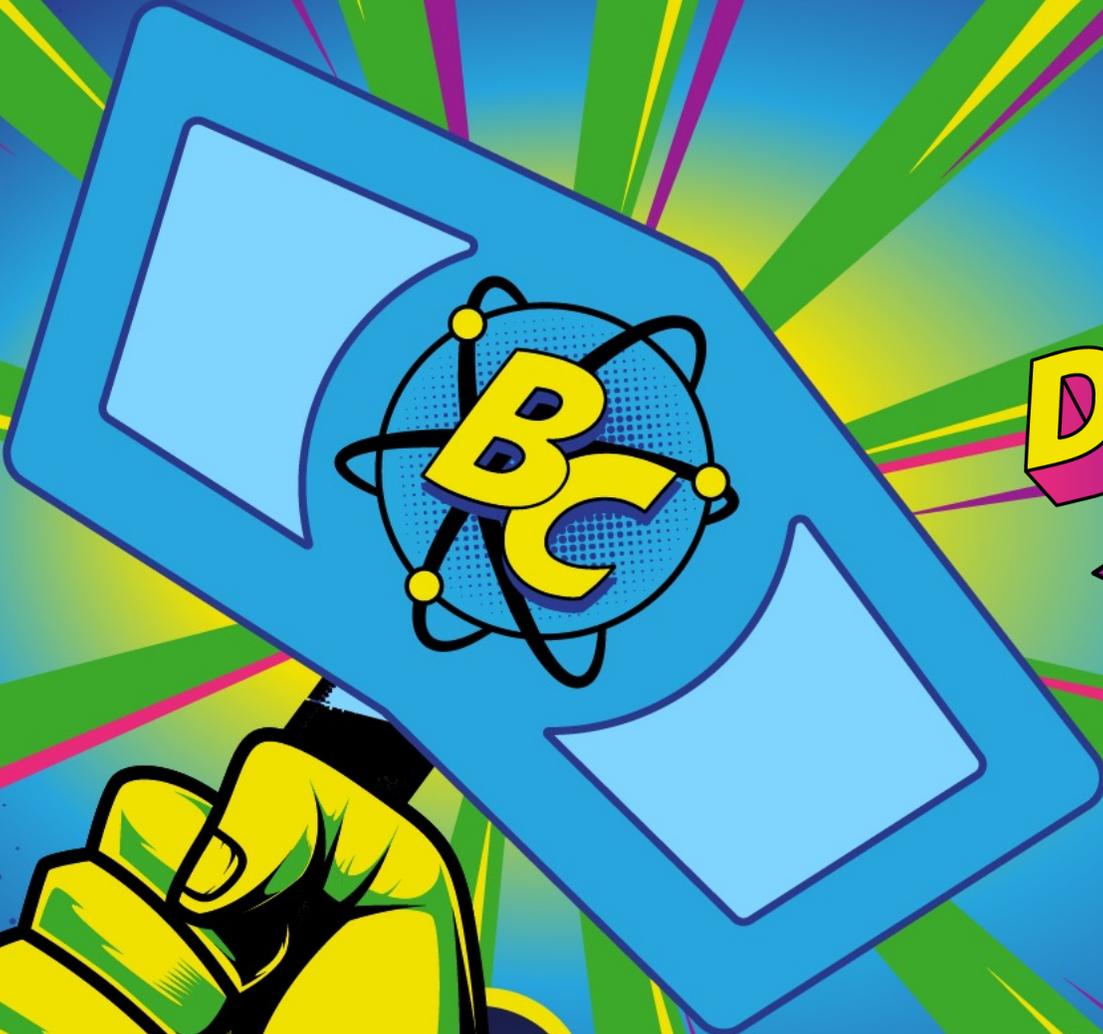


A DYNAMICSCON PRESENTATION



POWERED BY  DUG

# DYNAMICSCON VIRTUAL

MARCH 2023

BUSINESS  
CENTRAL

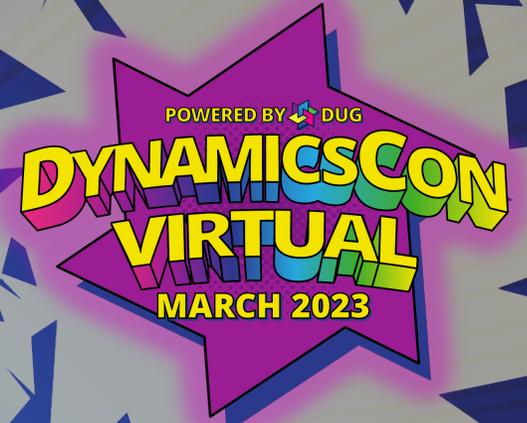
[DYNAMICSCON.COM](https://DYNAMICSCON.COM)

# WORKFLOWS

They work when they flow!

Ashley Lords & Olivia Nelson





Approval  
Methods &  
Approval  
User Setup

General  
Journal  
Approval

Introductions



Purchase  
Order  
Approval

Workflow  
User Group





# ASHLEY LORDS



- Certified as a Microsoft D365 Business Central Functional Consultant
- 2 years of experience in Microsoft Dynamics 365 (Business Central, Finance & Operations, Power Platform)
- 1 year of experience in O365 System Administration and Support
- Additional Expertise in Jet, Power BI, Dataverse, Azure, PowerShell





# OLIVIA NELSON

- BC Consulting Team Manager at Stoneridge Software
- 4 years as a Business Central Implementation Consultant
- 4 years as an ERP Analyst/Administrator at a printing manufacturer (NAV 2017, NAV 2013 R2, NAV 2009)
- Former Controller, Project Accountant, AR Specialist, and System Administrator (Dynamics AX 2009) at an aeration equipment manufacturer.



# Approval Workflows in Business Central

**What?** An approval workflow is a sequence of tasks triggered by an action, condition, or rule.

**Why?** Workflows are implemented alongside desired business logic to assist with separation of duties, unifying processes, and enforcing best practices.

**How?** Business Central provides Workflow Templates that can be configured using logic to meet your business needs.

**Who and When?** Business Central Workflows could be leveraged to address the following scenarios...

- A Manager may use a workflow to approve changes made to master records such as
  - G/L accounts, customers, vendors, or items.
  - Sensitive data points - Sales Prices, Customer Credit Limits, or Vendor Bank Account info
  - New users or changes to permissions
- A Purchasing Manager wants to approve a PO before sending to a Vendor.
- A Sales Manager wants to ensure certain criteria is met on a Sales Order before it released for production and shipping.
- A Controller wants to approve financial transactions before they are posted.

# APPROVAL METHODS

- Direct Approver

- Specific Approver

- Salesperson & Purchaser

- First Qualified Approver

- Approver Chain

- Workflow User Group

# APPROVAL USER SETUP

Salesperson & Purchaser

Salesperson Code ..... AL

First Qualified Approver

Approver Chain

User ID ↑	Salespers./Purch. Code	Approver ID	Sales Amount Approval Limit	Unlimit... Sales Approval	Purchase Amount Approval Limit	Unlimit... Purchase Approval	Request Amount Approval Limit	Unlimit... Request Approval	Substitute	E-Mail	Approval Admini...
→ ASHLEYLOR	AL	OLIVIA		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		ashleylor@stoneridgesoftware.com	<input type="checkbox"/>
OLIVIA	ON	ASHLEYLOR		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>		olivia@stoneridgesoftware.com	<input checked="" type="checkbox"/>
TRACY.OTTENSTR...	TO	ASHLEYLOR	100000	<input type="checkbox"/>	100000	<input type="checkbox"/>		<input type="checkbox"/>		tracy.ottenstroer@stoneridgesoftware.com	<input type="checkbox"/>

• Direct Approver

All approvers must be setup in the approval user setup.

# Purchase Order Approval Configuration

Using the Direct Approver Method, we will configure an approval request on a purchase order.

1. Create a new workflow from the Purchase Order Approval Workflow Template
2. Adjust the On Condition to filter for purchase orders over \$10,000
3. Configure the Then Response to Approver Type: Approver and Approver Limit Type: Direct Approver
4. Add a notification for the sender when the request has been approved.
5. Enable the Workflow!

DEMO

# General Journal Approval Configuration

*Scenario: The controller of a company wants to approve any and all manual Journal Entries before they post.*

Using the Specific Approver Method, we will configure an approval request for a General Journal batch.

1. Create a new workflow from the General Journal Batch Approval Workflow Template
2. Adjust the On Condition to filter by “Template Type” = ‘General’
3. Configure the Then Response to Approver Type: Approver and Approver Limit Type: Specific Approver
4. Add a notification for the sender when the request has been approved.
5. Enable the Workflow!

DEMO

The image features a dynamic, abstract background with a color palette ranging from deep purple to bright pink. A central, bright yellow-orange glow radiates outwards, creating a sense of energy and movement. This glow is surrounded by numerous thin, radiating lines that extend towards the edges of the frame. The overall composition is layered and textured, with various geometric shapes and patterns, including a subtle grid of small dots in some areas. The word 'DEMO' is prominently displayed in the center in a large, bold, sans-serif font. The letters are filled with a solid purple color and have a thin, white outline, making them stand out against the complex background.

# Approval Configuration: Workflow User Group

Workflow User Group Members		Manage
User Name ↑		Sequence No.
	ASHLEYLOR	1
	OLIVIA	2
→	TRACY.OTTENSTROER	3

Workflow User Group Members		Manage
User Name ↑		Sequence No.
→	ASHLEYLOR	1
	OLIVIA	1
	TRACY.OTTENSTROER	1

We need to change the condition on the second line of the Workflow steps from Pending: 0 to Always and delete the line with the condition of Pending >0.

→	An approval request is approved.	⋮	Pending Approvals: 0	(+) Remove record restriction.
	An approval request is approved.		Pending Approvals: >0	Send approval request for the record and create a notification.

# Approval Configuration: Workflow User Group

When Event	On Condition	Then Response
Approval of a purchase document is requested.	Document Type: Order, Status: Open, Amo...	(+) Add record restriction.
An approval request is approved.	<Always>	(+) Remove record restriction.
An approval request is rejected.	<Always>	(+) Reject the approval request for the record and create a notification.
An approval request for a purchase document is canceled.	Document Type: Order, Status: Pending Ap...	(+) Cancel the approval request for the record and create a notification.
An approval request is delegated.	<Always>	Send approval request for the record and create a notification.

We need to change the condition on the second line of the Workflow steps from Pending: 0 to Always and delete the line with the condition of Pending >0.

→	An approval request is approved.	⋮	Pending Approvals: 0	(+) Remove record restriction.
	An approval request is approved.		Pending Approvals: >0	Send approval request for the record and create a notification.

# APPROVAL SETUP BEST PRACTICES

- 1) **Involve Process Decision Makers**
- 2) **Define the Business Rules**
- 3) **Setup and TEST!!! in a test company**
- 4) **Use export/import functionality to move Workflow to live company**
- 5) **Before enabling in Production... Communicate!**
- 6) **Be available to support!**

THANK YOU!

