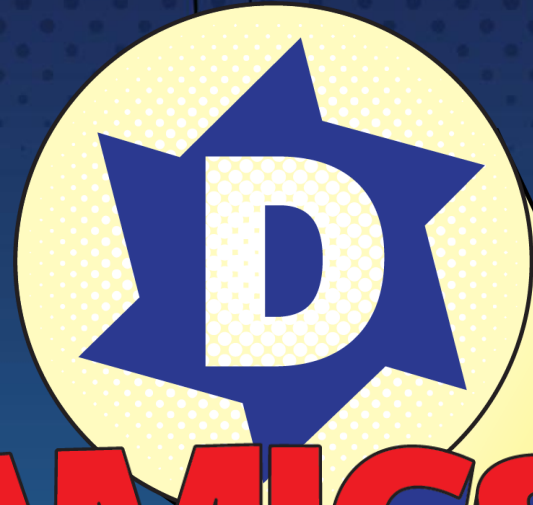


DYNAMICSCON PRESENTATION



DYNAMICSCON

15-17 March 2022



DynamicsCon.com



GP Workflow: The Basics and Holy Cow I Didn't Know That!



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Agenda

- Overview of setup for workflow
- Types of workflow
- Designing a workflow
- Create a vendor workflow
- Adding fields to messages
- Adding fields to conditions
- Questions



Workflow Setup

- Web Services needs to be installed
- Tools --> Setup --> System --> Workflow Setup

Workflow Setup

- Outgoing Mail Server
- SMTP Authentication
- Enable Email Actions

Workflow Setup - TWO (sa)

OK Cancel Test E-Mail Test E-Mail Action File Tools Help Add Note

File Tools Help

Enable E-Mail for Workflow

Outgoing Mail Server (SMTP)

E-Mail Address seversoncory@gmail.com

Display Name Cory Severson

Server Name smtp.office365.com Port 587

This server requires a secure connection (SSL)

SMTP Authentication

Windows Authentication using Database Engine service credentials

Basic Authentication

User Name corys@stoneridgesoftware.com

Password

Confirm Password

Anonymous Authentication

Enable E-Mail Actions

Dynamics GP Web Services Server

Server Name P52-0873 Port 48620

This server requires a secure connection (SSL)

Workflow Setup

- **Workflow Calendar**

- Used to calculate the deadlines for activities
- Tools → Setup → Company → Workflow Calendar

- **Email Messages**

- Tools → Setup → Company → Workflow → Email Message Setup
- Lots of out of the box messages starting with “WF”
- We can add additional fields
- Can create your own.

Workflow Types

Purchasing

- Payables Batch Approval
- Payables Transaction Approval
- Purchase Order Approval
- Purchase Requisition Approval
- Purchase Invoice Approval
- Receiving Transaction Approval
- Vendor Approval

Sales

- Receivables Batch Approval
- Sales Transaction Approval

Financial

- General Ledger Account Approval
- General Ledger Batch Approval

Project

- Expense Report Approval
- Timesheet Approval



Workflow Types

Administration

- Security Role Approval
- Security Task Approval
- Smartlist Designer View Approval
- User Approval
- User Security Approval

Payroll

- Employee Profile Approval
- Employee Skills Approval
- Payroll Direct Deposit Approval
- Payroll Timecard Approval
- Payroll W4 Approval

Vendor Approval Workflow

- Any new vendor or changes to an existing needs approval
- Single approver for all vendors.



Payables Transaction Approval

- Any account starting with 4 goes to Cory
- Any account starting with 8 goes to, well Cory again for now beings I'm doing the demo.
- How to add fields to the document lines.
- How to add fields to the messages.
- <https://community.dynamics.com/gp/f/microsoft-dynamics-gp-forum/257570/adding-fields-to-the-workflow-message?pifragment-96056=1>
- <https://www.fmtconsultants.com/how-to-customize-microsoft-dynamics-gp-workflow-emails/>
- In the Dex.ini, set the QueryDesignerAllFunctionality=TRUE switch, and restart GP.

Workflow Maintenance

- If you need to make changes to a workflow here is what needs to be done.
 - All existing items in process need to be completed or in a rejected state.
 - We need to inactivate the workflow
 - Now we should be able to make the changes
 - If you can't go to the navigation lists to see what may still be pending
 - Save the workflow and activate again.
- **Tips:**
 - Use your test company.
 - Copy
 - Export/Import

Questions?



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