

User Documentation AppSource

agilesWorkflow

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Important additional information:

The User Documentation was done in a US database in Microsoft Dynamics 365 Business Central Wave1 2020 (BC16).

Set your Work Date to System Date.





1) Open Extension Management





1) Extension Management List: agilesWorkflow <u>and</u> agilesWorkflow Base Application is not installed yet

Dynamics 365 Busine	ess Central					Sandbox C	۵ ۵	٥	?	S
	My Company Finance ~ ←	EXTENSION MANAGEMENT					7			
	Notifications: 2 The agilesWorkflow De.	View - Extensi	on Management				~			
	HEADLINE	🔎 Search Manage 📲 Open	in Excel	\ 🗉						
	Hil	Description	Name †	Version	New	> Reports				
	· · · ·	Not Installed	agilesWorkflow	v. 16.1	Fayments	E Excerneports				
		Not Installed	agilesWorkflow Base Application	v. 16.1						
		Installed	Application	v. 16.0						
	•••	Installed	Base Application	v. 16.0						
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	0 (Not Installed	Dutch language (Belgium)	v. 16.0						
		Not Installed	Dutch language (Netherlands)	v. 16.0						
	>See more >	Not Installed	English language (Australia)	v. 16.0						
		Not Installed	English language (Canada)	v. 16.0						
	ONGOING SALES	Not Installed	English language (New Zealand)	v. 16.0						
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		Not installed	English language (United States)	v. 16.0	$\left \right\rangle$					
		Not Installed	Essential Business Headlines	v. 16.0	<u> </u>	_				
	>	Not Installed	Finnish language (Finland)	v. 16.0	>					
		Not Installed	French language (Belgium)	v. 16.0						
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	\bigcirc	Not Installed	French language (Switzerland)	v. 16.0						
		Not installed	German language (Austria)	v. 16.0						



1) Click on Install

Dynamics	365 Business Central			Sandbox	Q	Q	Ø	?	A
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	🔎 Search Manage 🛛 Øpen ir	Excel				7			
	Description	Name Ť	Version						
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	Not Installe Manage	agilesWorkflow Base Application	v. 16.1						
	Installed 斗 Install	Application	v. 16.0						
	Installed 🛼 Uninstall	Base Application	v. 16.0						
	Not Installe	Business Central Intelligent Clo	v. 16.0						
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	Not Installe Manage	Danish language (Denmark)	v. 16.0						
		- Dutch language (Belgium)	v. 16.0						
		Dutch language (Netherlands)	v. 16.0						
	Not Installe 🦛 Select More	English language (Australia)	v. 16.0						
	Not Installed	English language (Canada)	v. 16.0						
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1) Click on Next

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÷	EXTENSION MANAGEMEN	л	EXTENSION INSTALLATION	2 ×	(7 ⁴		
	View - Exten	sion Mana	INSTALL EXTENSION Extensions add new capabilities that	extend and enhance functionality.							
	🔎 Search Manage	Open in Excel	Name	agilesWorkflow				7	≣		
	Description	Name †	Description	Did you know that 85% of unfulfilled customer requirements are related to							
	Not Installed	: agilesV		and not to your employees? agilesWorkflow							
	Installed	Applica		is your solution to fulfill your customer	i.0						
	Installed	Base A	Version ·····	16.18.0.0	¥.0						
	Installed	Busine	Publisher	agiles	i.0						
	Not Installed	Czech	App ID	fa6cde23-7cca-4fe8-9bc0-e79565f55bd2	5.0						
	Not Installed	Danish	Website		i.0						
	Not Installed	Dutch	Help		5.0						
	Not Installed	Dutch			i.0						
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	Not Installed	English	language (Canada)	v. 16.0.10	0855.0						
	Not Installed	English	language (New Zealand)	v. 16.0.10	0855.0						
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	Installed	Essentia	al Business Headlines	v. 16.0.10	0855.0						



1) Click on Install

nics	365 Business Central							Sandbox	Q	Q	Ø	?	A
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	View - Exten	sion Mana	REVIEW EXTENSION INFORMATION	BEFORE INSTALLATION agilesWorkflow									
	🔎 Search Manage	Dpen in Excel	Publisher	agiles						7			
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	Not Installed	: agilesV											
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	Not Installed	Czech					5.0						
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	Not Installed	English	language (United King			v. 16.0.108	55.0						



1) Click on Ok

Dynamics 365 Business Central Sandbox Q D 🛞 ?									
CRONUS USA, Inc. Finance	EXTENSION MANAGE EXTENSI	ON INSTALLATION	27	X D d 2					
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× This is a sandbox er	VICVV L Name	agilesWorkflow				~			
	🔎 Search Mana Publishe	r agiles		\					
HEADLINE	Languag	e English (United State	es)		el Reports				
HI!	Description			Version					
	Not Installed			v. 16.1	7				
	Installed			v. 16.0.	1				
	Installed	The agilesWorkflow extension was successfu users must sign out and sign in again to see	lly installed. All active the navigation	v. 16.0.	1				
• 0	Installed	changes.	v. 16.0.	1					
Activities	Not Installed		v. 16.0.	1					
Activities ~	Not Installed		v. 16.0.	1					
SALES THIS MONTH	Not Installed		v. 16.0.	1					
\cap	Not Installed			v. 16.0.	1				
0	Not Installed		Back	v. 16.0.	1				
>See more	Not Installed	English language (Canada)		v. 16.0.	1				
	Not Installed	English language (New Zealand)		v. 16.0.	1				
ONGOING SALES	Not Installed	English language (United King		v. 16.0.	1				
SALES QUOTES SAI	Not Installed	English language (United States)		v. 16.0.	1				
	Installed	Essential Business Headlines		v. 16.0.	1				



- 1) Install the agilesWorkflow Base Application
- 2) Important: Two agilesApps must be installed (agilesWorkflow & agilesWorkflow Base Application)
- 3) After the installation of both apps (as described for the first app in the slides before) the two apps are displayed in the extension management with the description installed.

Dynamics 365 Busine	ess Central					Sandbox Q	٩	Ô	? 5
	My Company Finance >	EXTENSION MANAGEMENT							
	Customers Vendors Items Bar Notifications: 2 The agilesWorkflow De	View - Extensi	on Management				~		
	HEADLINE	🔎 Search Manage 🖪 Open	in Excel	\ \					
	Hi!	Description	Name †	Version	New Payments	> Reports			
		Installed :	agilesWorkflow agilesWorkflow Base Application	v. 16.1 v. 16.1					
		Installed	Application	v. 16.0					
	• •	Installed	Base Application	v. 16.0					
	Activities	Not Installed	Business Central Intelligent Clo	v. 16.0					
	Activities~	Not Installed	Czech language (Czechia)	v. 16.0					
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	UNBUING SALES	Not Installed	English language (New Zealand)	v. 16.0					
	SALES QUOTES SALES ORDERS	Not Installed	English language (United King	v. 16.0	OUTSTANDIN INVOICES	G			
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		Not Installed	Finnish language (Finland)	v. 16.0	>				
		Not Installed	French language (Belgium)	v. 16.0					
	INCOMING DOCUMENTS MY USER TASI	Not Installed	French language (Canada)	v. 16.0					



1) Click on Settings

Dynamics 365 Business Central						Sandbox	Q Q	Ø	?
CRONUS USA, Inc. Finance Cash M	∕lanagement∨ Sales∨ Purcha	ising ~ Intelligent Cloud	d Insights 🗸 🛛	=				_	
Customers Vendors Items	Bank Accounts Chart of Accounts	;						2	
imes This is a sandbox environment (p	review) for test, demo, or development p	urposes only. Don't show th	nis again.					~	
HEADLINE		AC	TIONS						
		+	Sales Quote + P	Purchase Quote	> New	Excel Repo	orts		
		+	Sales Order + P	Purchase Order	> Payments				
		Ŧ	Sales Invoice TP	rurchase involce	> Reports				
• •									
Activities									
Activities \checkmark sales this month	OVERDUE SALES INVOICE	OVERDUE PURCH. INVOICE	SALES IN	VOICES PREDICT					
\cap				E					
0	0	0	0						
>See more	>See more	>See more	>See m	nore					
ONGOING SALES	ONGOING PU	RCHASES		APPROVALS					
SALES QUOTES SALES ORDERS	SALES PURCHASE	ONGOING PUR	PURCH. INVOI	REQUESTS TO					
	INVOICES ORDERS			APPROVE					



- 1) Click on Settings
- 2) Click on My Settings

Dynamics 365 Business Central						Sandbox Q	Q (2) ?	К
CRONUS USA, Inc. Finance Cash	n Management ~ Sales ~ Purchas Bank Accounts Chart of Accounts	sing∨ Intelligent C	loud Insights \vee	=		Personalize Design		
imes This is a sandbox environment	(preview) for test, demo, or development pu	rposes only. Don't sho	w this again.			Wy settings	Manage your user settir	ngs
HEADLINE Want to lea Business Ce	arn more abo entral?	ut	ACTIONS + Sales Quote + Sales Order + Sales Invoice	+ Purchase Quote + Purchase Order + Purchase Invoice	> New > Payments > Reports	Excel Reports		
0.								
Activities								
Activities \backsim sales this month	OVERDUE SALES INVOICE	OVERDUE PURCH. INVO	DICE SAI	LES INVOICES PREDICT ERDUE				
0	0	0	С)				
>See more	>See more	>See more	2<	See more				
ONGOING SALES		RCHASES		APPROVALS				
SALES QUOTES SALES ORDER	RS SALES PURCHASE ORDERS	ONGOING PUR INVOICES						



1) Use look up value

Dynamics 365 Business Central		Sandbox Q	0 0	?	К
CRONUS USA, Inc. Finance < Cash Management <	EDIT - MY SETTINGS				
Customers Vendors Items Bank Accounts			2		
imes This is a sandbox environment (preview) for test, dem	Role ····· Business Manager ···		~		
	Company Open assist edit				
HEADLINE	Work Date	E Excel Reports			
Want to learn mo	Region German (Germany) r > Payments				
Business Control?	Language · · · · · · · English (United States) ce > Reports				
Dusiness Central:	Time Zone · · · · · · (UTC+01:00) Amsterdam, Berlin, Bern,				
0.	Notifications · · · · · · Change when I receive notifications.				
Activities	Your last sign in was on 24.02.20 11:53.				
Activities ~					
SALES THIS MONTH OVERDUE SALES AMOUNT	OK Cancel DT				
0 0					
>See more >See more	>See more >See more				
ONGOING SALES	ONGOING PURCHASES APPROVALS				
SALES DUIDTES SALES ORDERS SALES					
SALES GOVES SALES ONDERS	ORDERS INVOICES NEXT WEEK APPROVE				



1) Select ADMINISTRATOR (agilesWorkflow)





1) Click on Ok

ynamics 365	Business Central							Sandbox	Q	Q	Ø	?	K
CRONUS L	JSA, Inc. Finance Cash M	anagement \vee	EDIT - MY SETTINGS		Ľ	7							
	Customers Vendors Items I	Bank Accounts									2		
	× This is a sandbox environment (pr	eview) for test, dem	Role	WKFL - ADMINISTRATOR WEB		•				、 、	~		
			Company	agiles		•							
	HEADLINE		Work Date · · · · · · · · · · · · · · · · · · ·	24.02.2020			> New	E Excel Rep	orts				
	Want to lear	n mo	Region	German (Germany)		• r	> Payments						
	Rusiness Co	ntral?	Language	English (United States)		. ce	> Reports						
	DUSITIESS CE	IIII al:	Time Zone	(UTC+01:00) Amsterdam, Berlin, B	Bern,	•							
	0.0		Notifications	Change when I receive notification	ons.	11							
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	Activities ~ SALES THIS MONTH	OVERDUE SALES			7	ст.					_		
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	>See more	>See more	>See more	See	more								
	ONGOING SALES		ONGOING PURCHASES		APPROVAL	_5							
	SALES QUOTES SALES ORDERS	SALES INVOICES	PURCHASE ONGOIN ORDERS INVOICE	IG PUR PURCH. INVOI ES NEXT WEEK	REQUES APPROV	TS TO E							
	\bigcirc	\cap	\bigcirc	\bigcirc	$\left(\right)$								



- 1) You are at the Role Center
- 2) Click on Setup
- 3) Click on Workflow Setup

































- 1) Click on Setup
- 2) Click on Workflow Setup





- 1) Click on Show the rest
- 2) Click on Actions
- 3) Click on Initialize
- 4) Click on Team
- 5) Click on Load from table 5083/"Team"





1) Click on Yes

Dynamics 365 Business Central		Sandbox Q D @ ? S
CRONUS USA, Inc. Workflows Workflow Archi The agilesWorkflow Demo	 ✓ + ■ □ □ ✓ Workflow Setup Add me to thestration team I Initialize Permission Sets Set Default Profile I Initialize Cue Setup ··· 	~
There are in this cor Activities Workflow Administratic	General Show more Version agiles/Workflow 15.0 for Dynami Employee Code for A WKFLAUTO TASK SCHEDULER Administration Team WKFLADMIN Create Automatic Wo Create Manual Workfl Create Manual Workflow St Cleaculate Workflow St Calculate Workflow St Create Automatic Workflow St	
SETUP PRODUCT VI	Numbering Show more LIVE TEMPLATE Workflow No. Series O you want to load the teams from table 5083 / 'Team'?	S
Insights My Workflows ~ Reference Type No. ↑ Reference	Clients> Ves No Deleting Entries> Locking>	No. Of Open Ne 21 Ta-das Ta-das



1) Click on Yes





1) Click on Ok





- 1) Search for Employees
- 2) Click on Employees





- 1) Enter Salesperson Code in agiles Employee Table for later use: BD Bart Duncan, AH Annette Hill:
- 2) Click on +New

Dynamics 365 Business	Central				٩
	CRONUS USA, Inc.	Setup \lor Templates \lor \equiv			
	Employees: All \smallsetminus		ieams 👍 Times of Abcence 📲 Open in Excel 🛛 Weitere Optionen		7 = 1 2
	Code 1	Name	E-Mail	User ID	Salesperson/Purchaser Code
	АКО	:		AKO	
	WKFLAUTO	WKFL Automatic User			



- 1) Enter Code BD
- 2) Enter Name Bart Duncan
- 3) Add your User ID (eg. SBA) to employee Bart Duncan
- 4) Click on back

365 Business Central		Sandbox Q Q	
MPLOYEE CARD WORK DATE: 06.04.2020	(2) + 11	√ SAVED	ದ 💉
BD · Bart Duncan			
😵 Teams 🛛 🖕 Times of Abcence More options			0
General		Show more ① Details ③ Attachments (0)	
Code ····· 💀 Name ·····	Bart Duncan	Picture ~	
References			
User ID	······		
Salesperson/Purchaser C · Resource No. · · ·	······ ×		
E-Mails >			
Function Call Server>		Employee Details	
Absence >		1 0 0 0 No 0.000000 €0-	
Attachment Document >		1	



- 1) Delete your own user:
- 2) Select your own user (eg. SBA)
- 3) Click on Delete
- 4) Click on +New





- 1) Enter Code AH
- 2) Enter Name Annette Hill

165 Business Central			Sandbox	Q D	Ø	?
employee card I work date: 06.04.2020 AH · Annette	(2) + II		√S	AVED	⊐',≮	
Teams times of Abcence More options					0	
General		Show more	Details Attachments (0)		
Code · · · · · · · · · · · AH	Name · · · · · · · · · · · · · · Annette Hill		Picture ∨			
References						
User ID · · · · · · ·	··· Employee No.	\checkmark				
Salesperson/Purchaser Code	V Resource No.	\sim				
E-Mails >						
Function Call Server >		No	Employee Details			
Absence >		No	O O O Waiting To-dos Now To-dos Critica	O al To-dos		
Attachment Document >			0 0 All to be completed To-			
Information >		SBA 01.04.2020	dos dos			



- 1) Search for Teams
- 2) Click on Teams





- 1) Select Workflow Admin
- 2) Click on Employee




Basic Setup – Load Teams and Employees

- 1) Add Bart Duncan und Annette Hill
- 2) Click in Field Employee Code and select BD
- 3) Click in Field Employee Code in the next line and select AH
- 4) Go back to Role Center





- 1) Click on Setup
- 2) Click on Reference Types





1) Click on +New





1) General:

Select No. \rightarrow 18 Select Editing Page ID \rightarrow 21 Enter Buffer Time on Task Scheduler \rightarrow 10 seconds Activate Automatic Workflows

365 Business Central			Sandbox C	Q D @	? К
REFERENCE TYPE CARD	(<i>d</i>) + 🛍		√ SA	/ED ⊑* ォ [⊭]	
Customer	\smile				
Navigate				0	
General		Show more	Reference Type Details		
No	18 ···· Differing Table Descriptio ·		No. Of Workflows	0	
No. Description Customer	Default Workflow Templa	\sim	No. Of Open Workflows	0	- 1
Description · · · · · · Customer	Buffer Time on Function 10 seconds				- 1
Editing Page ID	21 ···· Automatic Workflows · · · · ·				
Editing Page Description · · · Customer Card	Ignore from Check Auto				- 1
Differing Table ID (Editin	0 V Ignore from Check Workf ·				
Grouping					
Workflow Group Field Ta	0 🗸 Workflow Group Field ID · · ·	0			- 1
Workflow Group Field Ta	Workflow Group Field De				



1) Click on Keyword Definitions

REFERENCE TYPE CARD ARBEITSDATUM:	06.04.2020	(2) + II		√ GESPEICHER	л 🖬 "۲
Customer					
Keyword Definitions Weitere Opt	tionen				Ō
General			Mehr anzeigen	Reference Type Details	
No	18 …	Default Workflow Template Code	\sim	No. Of Workflows	0
No. Description	Customer	Buffer Time on Task Scheduler		No. Of Open Workflows	0
Description	Customer	Automatic Workflows			
Editing Page ID	21	Ignore from Check Automatic Workflo			
Editing Page Description	Customer Card	Ignore from Check Workflow Status U.,. 🕐 💽			
Grouping					
Workflow Group Field Table ID	0 ~	Workflow Group Field ID	0		
Workflow Group Field Table Description		Workflow Group Field Description			



 Define Keywords as Information about the Data Item (e. g.) First line

Enter Table ID \rightarrow 18

Select Field ID \rightarrow 1

Second line

Enter Table ID \rightarrow 18

Select Field ID \rightarrow 2

2) Close all pages and go back to the Role Center

Dynamics 365 Business C	entral									Sandbox C	ς φ	Ø	?	К
(CUSTOMER				I	NOT SAV	'ED	<u>ت</u> ک			/ SAVED	ď	7 ⁴
Re	Custo	Edit - Wo	orkflow Keyv	word [Definition	s - Ci	usto	ome	er					
	Navigate	✓ Search + New	🐺 Edit List 📋 Delete	🚺 Open in E	xcel				7 ≣					
	General					Use	Use in To-	Use	Use in E-	е Туре	Details			
	No. • • • • •	Table ID	Table Description	Field ID	Field Description	in Wor	do Gro	in To- do	mail Noti	kflows			(0
	No. Descript	18	Customer	1	No.	ø			•	n Workflo	WS		(0
	Description	\rightarrow 18	Customer	2 …	Name	•	•	•	e					
	Editing Page													
	Editing Page													
	Differing Tal													
	Grouping													
	Workflow G													
	Workflow G													



Scenario 1 New Customer



- 1) Click on Templates
- 2) Click on Workflows
- 3) Click on +NEW





1) General:

Use look up value Reference Type No. and select \rightarrow 18 Enter Code \rightarrow WF010 Enter Description \rightarrow New Customer Workflow

865 Business Central		Sandbox Q	ф ©
WORKFLOW TEMPLATE CARD	(2) + iii	, ✓ SAVEI	D C'a ^k
Process Report More options			0
General	Show more	① Details ① Attachments (0)	
Reference Type No	No. Of Use Conditions · · · · · 0	Workflow Template Details	
Reference Type Descripti Customer	REACTION	No. Of Use Conditions	0
Code · · · · · · · · · · · · · · · · · · ·	Reaction on Condition D Delete	No. Of Workflows	0
Description · · · · · · · New Customer Workflow	Reaction on Deleted Sou Delete	No. Of Open Workflows	0
Workflow Template Manage More options	E2		
Type Code	Description		
→ To-do			
Editing			
Editing PAGE ID	0 ···· Differing Table ID (Editin 0 V		
F I'V PACE D I V	Differing Table Descripti		



- 1) Workflow Template: Use look up value Code
- 2) Click on +New

					0
Process Report N	lore options				
General			Show more	① Details ① Attachments (0)	
Reference Type No.	18 ~	No. Of Use Conditions	0	Workflow Template Details	
Reference Type Descripti	Customer	REACTION		No. Of Use Conditions	0
Code · · · · · · · · · · · · · · · · · · ·	WF010	Reaction on Condition D Delete	•	No. Of Workflows	0
Description	New Customer Workflow	Reaction on Deleted Sou Delete	T	No. Of Open Workflows	0
Workflow Template	Manage Line Fewer options		E		
Туре	Code	Description			
→ To-do		\checkmark			



- 1) Enter Code WF010-TD010
- 2) Enter Descripiton Check mandatory fields

365 Business Central		Sandbox Q D 🚳 ?
WORKFLOW TEMPLATE CARD WORK DATE: 06.04.2020	Manage 🖷 Field Examination 🛛 💕 Decision 🛛 🔮 Conditional Responsibilities \cdots	√ SAVED 🖬 🧝
WF010 · New Customer Worl	SELECT - TO-DO TEMPLATE CARD - WF010-TD010	
Process Report More options	General Show more	0
General	Reference Type No. · 18 · Priority · · · · · · Normal •	① Details 🕼 Attachments (0)
Reference Type No	Reference Type D Customer Code WF010-TD010 Description Check mandatory fields	Workflow Template Details No. Of Use Conditions 0 No. Of Workflows 0
Description New Customer Workf	To-do Template Comments Manage	No. Ut Upen Workflows U
Workflow Template Manage More options	Date Comment Date Comment Show more Comment	
7 10-00	Team Code Employee Code Team Name Employee Name	
Editing	Activation >	



1) **Responsibility:** Use look up value Employee Code and select \rightarrow BD





- 1) Time Frame: click on show more
- 2) Enter Duration Date Calculation \rightarrow 1D





- 1) Criteria: Select option value in field Type → Field Examination
- 2) Use look up value in field Condition Code





Scenario 1: New Customer – Table Condition

1) Click on +New





Scenario 1: New Customer – Table Condition

1)	General:
	Automatically entered Table ID \rightarrow 18
	Enter Code → WF010-C010
	Enter Description → Check mandatory fields
2)	Table Condition: Enter the following conditions in lines
	Type \rightarrow Field, Field ID \rightarrow 2, Filter \rightarrow <>"
	Type \rightarrow Field, Field ID \rightarrow 21, Filter \rightarrow <>"
	Type \rightarrow Field, Field ID \rightarrow 88, Filter \rightarrow <>"
	Type \rightarrow Field, Field ID \rightarrow 110, Filter \rightarrow <>"
	Type \rightarrow Field, Field ID \rightarrow 20, Filter \rightarrow >0

- 3) Close page
- 4) Click on Ok

TABLE CONDITION	CARD		Ø) +	۱.			√ SAVED	⊂* ہ [⊻]
WF010-C	⊃10 · Che	ck manda [:]	tory fields						
Navigate									
General									
Table ID · · · · · ·			1	8 Desc	cription · · · · · · · · · · · · · · · · · · ·	· · · · · · Che	eck mandatory fields		
Table Description		Customer		Turne		Et al	d Examination		
lable Description		Customer		Type		rie			
Code · · · · · · · ·		WF010-CO10		Type	2	rie			
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Scenario 1: New Customer – Table Condition

- 1) Notice: Condition is entered in Condition Code WF010-C010
- 2) Click on + on the To-do Template and enter a new To-do Template





1) General:

Enter Reference Type No. \rightarrow 18 Enter Code \rightarrow WF010-TD020 Enter Description \rightarrow Attached Credit Application

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	To-do Template Comments Manage Date Comment →	U



1) **Responsibility:** Enter Employee Code \rightarrow AH





1) Time Frame:

Enter Source Type \rightarrow To-do Enter Source Code \rightarrow WF010-TD010 Enter Duration Date \rightarrow 1D





- 1) Criteria: Select Type → Manual Completion
- 2) Close this page and go back to the Role Center





- 1) Click on Templates
- 2) Click on To-do Groups





1) Click on +New





1) General:

Enter Reference Type No. \rightarrow 18 Enter Code \rightarrow WF010-TG010 Enter Description \rightarrow Department Checks

- 2) Use look up value in field Code
- 3) Click on +New

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÷	то-do group темрцате саяd WF010-TG010 · Department Ch	(ecks	 + 1		√ SAVED	^س م ^ب		
	🛦 Expanded View 🛛 🖪 Keyword Definitions 🛛 🖏 Field Mo	difications More options				Ū		
	General			Show more	Details Attachments (0)			
	Reference Type No.	18 ~ Code · · · · · ·	WF010-TG010		To-do Group Template Details			
	Reference Type Description · · · Customer	Description · · · · ·	Department Checks		No. Of Workflow Allocations	0		
					No. Of To-do Groups	0		
	To-do Group Template Manage More options			5	No. Of Open To-do Groups	0		
	Type Code → To-do Re → + Ne	Pescriptio ference Type No. ↑ ♥ Code ↑ 18 WF010-TD010 18 WF010-TD020 w New	Description Check mandatory fields Attached Credit Application Select from full list					



1) General:

Enter Reference Type No. \rightarrow 18

Enter Reference Type Description → Customer

Enter Code → WF010-TD030

Enter Description → Review Dimension and Posting Group Setup

	E Field Examination	🕌 Decision	鑙 Conditional Responsibilitie	s 🛛 📭 Keyword Definitions	🐨 Status Changes	🌄 Field Modificatio	ins Page	Mo	ore options	ŝ
SELECT - TO-DO TEMPLATE CARD - WF010-	TD030 · REVIEW DIME	NSION AND PO:	STING GROUP SETUP							,⊿'
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To-do Template Comments Manage	- [Comment	Employee Code	·····				Show mo	



1) Responsibility:

Click in field Team Code Click on +New

TO-DO TEMPLATE CARD	WORK DATE: 06.04.2020			Ø	+ 🗊			V SAVED 📑 📌
WF010-TD03	80 · Review Dimensio	on and Posting	Group Setup					
E Field Examination	🚰 Decision 🛛 👹 Conditional Responsi	bilities 🛛 🖳 Keyword Definiti	ons 📧 Status Changes	Field Modifications	R Decision Field Modifications	More options		0
General						Show m	O Details Attachment	ts (0)
Reference Type No.	18	V Priority	Normal	•			To-do Template Details	
Reference Type Descripti	Customer						No. Of Conditional Resp.	0
Code	WF010-TD030						No. Of Field Modifications	0
Description	Paview Dimension and Pasting Cro						No. Of Group Allocations	0
Description	Review Dimension and Posting Gro	dh					No. Of Workflow Allocations	0
							No. Of To-dos	0
To-do Template Comme	nts Manage					E	No. Of Open To-dos	0
Responsibility						Show e		
Responsibility	ADM	Employee Code ····				Show m	nore	
Responsibility Team Code Team Name	ADM.	Employee Code ···		~		Show m	NOTE	
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- 1) Create new Team Finance:
- 2) Enter Code: Finance
- 3) Enter Name: Finance
- 4) Click OK

TO-DO TEMPLATE CARD WORK DATE: 06.04.2020	Search + New	Belete 🕹 Employee	WB Open in Excel N	ore options			√SAVED 🖂 💉
WF010-TD030 · Review Dimension a	SELECT - TEAMS				2		
Field Examination 🔐 Decision 🔮 Conditional Responsibilities	Costs 2	News	Next To do Date	No Officiales	No. Of Orese Tourist		
Reference Type No. 18 🗸	Einance	Name	Next 10-do Date	No. Of Id-dos	No. Of Open 10-dos	Details Attachments (0)	
Reference Type Descripti Customer	ADM	Administration	-	0	0		
Code WF010-TD030	CANVAS	Canvas team	-	0	0	To-do Template Details	
Description Review Dimension and Parting Group	MARKETING	Marketing Group	_	0	0	No. Of Conditional Resp.	0
review officersion and Posting Group	SALE	Sales Eiald Sanica	-	0	0	No. Of Field Modifications	0
	SUPPORT	Product support		0	0	No. Of Group Allocations	0
To-do Template Comments Manage	WKFLADMIN	WKFL Admin Team		0	0	No. Of Workflow Allocations	0
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Date				0	Cancel	No. Of Open To-dos	0
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Responsibility					Show more		
Responsibility Team Code	Employee Code				Show more		
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Responsibility Team Code Team Name Activation > Time Frame REFERENCE DATE Source Reference Type N	Employee Code Employee Name DURATION Duration Date Calculation Deadline Time Critical Date Calculation				Show more Show less		
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1) Responsibility: Finance Team is entered

WF010-TD030	· Review Dimension a	and Posting Gro	oup Setup					
E Field Examination	Decision 🛛 😤 Conditional Responsibilities	Keyword Definitions	📧 Status Changes	R Field Modifications	R Decision Field Modifications	More options		0
General						Show more	Details Attachments (0)	
Reference Type No.	18 🗸	Priority	Normal				To-do Template Details	
Reference Type Descripti	Customer						No. Of Conditional Resp.	0
Code	WF010-TD030						No. Of Field Modifications	0
Description	Review Dimension and Posting Group						No. Of Group Allocations	0
							No. Of To-dos	0
To-do Template Comments	Manage					53	No. Of Open To-dos	0
10								
Date		Comment						
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Responsibility Team Code Team Name Activation > Time Frame REFERENCE DATE Source Reference Type	FINANCE ~	Employee Code Employee Name DURATION Duration Date Calculation		~		Show less	-	
Responsibility Team Code Team Name Activation > Time Frame REFERENCE DATE Source Reference Type	FINANCE V Finance 18 V Customer	Employee Code Employee Name DURATION Duration Date Calculation Deadling Time		~		Show let	-	



1) Time Frame:

Use look up value in field Source Type and select To-do Enter Source Description \rightarrow Attached Credit Application Enter Duration Date Calculation \rightarrow 2D Enter Critical Date Calculation \rightarrow -1D





1) Criteria:

Enter Type → Manual Completion

2) Close this page





- 1) Assign this To-do Template to the To-do Group Template:
- 2) Use look up value
- 3) Click Select from full list
- 4) Select WF010-TD030 Review Dimension and Posting Group Setup

10-00 BROOF 12	MPLATE CARD I WORK DATE: 06.04.2020	(<i>e</i>) + 🗈	~ SA	WED 🖬 💉
WF010-T	G010 · Department Checks			
A Expanded View	w 🖪 Keyword Definitions 🕅 Field Modifications	Actions Navigate Fewer options		0
General		Show more	Details Attachments (0)	
Reference Type N	lo. · · · · · 18 🗸	Code	To-do Group Template Details	
Reference Type D	escripti Customer	Description Department Checks	No. Of Workflow Allocations	0
			No. Of Group Allocations	0
			No. Of To-do Groups	0
To do Group Tem	aplata Managa Managatiana			
To-do Group Tem	nplate Manage More options	E	No. Of Open To-do Groups	0
To-do Group Tem	nplate Manage More options	Code Description	No. Of Open To-do Groups	0
To-do Group Tem Type → To-d	e do	Code Description WF010-TD030 weivew Dimension and Posting Group Setup Ne1 TP Code 1 Ne1 TP Code 1 18 WF010-TD030 18 WF010-TD030 19 Microso TD0203 19 Microso TD0203 19 Microso TD0203 19 Microso TD0203	No. Of Open To-do Groups	0



1) Click on +New





1) General:

Enter Reference Type No. \rightarrow 18 Enter Code \rightarrow WF010-TD040 Enter Description \rightarrow Credit and Background Check





- 1) **Responisbility:** Enter Team Code \rightarrow Sales
- 2) Enter a new Team Sales





1) Time Frame:

Use look up value in field Source Type and select To-do Select Source Code WF010-TD020 Enter Duration Date Calculation \rightarrow 2D Enter Critical Date Calculation \rightarrow -1D

2) Criteria:

Use look up value in field Type and select Manual Completion

3) Close Page

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Reference Type No. † Referen 18 Custon 18 Custon	Attachment Documents 🖷 Field Examination 👔 Decision	ion & Conditional Responsibilities	ments (0)
18:Custon18Custon	Time Frame Reference Date	Show more Duration	ils 0
۲	Source Type · · · · · · · To-do Source Code · · · · · · · · WF010-TD020 Source Description · · · · Attached Credit Application	Duration Date Calcul	0 1 5 0 0
	Source Table ID 5128078 Source Table Descript To-do Source Field ID 5128415	- i	0
	Source Field Descripti End Date (Actual) Source Offset Date C		
	Criteria	Show more	
	Type Manual	Completion	



1) Click on +New




1) General:

Enter Reference Type No. \rightarrow 18 Enter Code \rightarrow WF010-TD050 Enter Description \rightarrow Setup Shipping Fields





1) **Responsibility:** Enter Employee Code \rightarrow AH





1) Time Frame:

Use look up Source Type \rightarrow To-do Enter Source Code \rightarrow WF010-TD020 Enter Duration Date Calculation \rightarrow 2D Enter Critical Date Calculation \rightarrow -1D

2) Criteria: Use look up value in field Type and select Manual Completion

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	Source Field Descripti · End Date (Actual)		
	Source Offset Date C		
	Criteria	Show more	
	Type Manual Manual	Completion 🔻	



- 1) Close all pages and go back to the Role Center
- 2) Click on Template
- 3) Click on To-do Groups





- 1) Select the first line
- 2) Click on show more
- 3) Click on Edit





1) To do Group Template:

Second line

Enter To-do in field Type

Enter Credit and Background Check in field Description

Third line

Enter To-do in field Type

Enter Setup Shipping Fields in field Description

2) Close page

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← EC	DIT - TO-DO GROUP TEMPLATE	CARD - WF010-TG010 · DEPARTM	(2) + ii		√ SAVED	۲ ۲ ^۲		
V	VF010-TG010 · E	Department Checks	\bigcirc					
4	Expanded View 🛛 🖪 Keywor	rd Definitions 🛛 🐺 Field Modifications	More options			0		
G	eneral			Show more	① Details 🛛 Attachments (0)			
Re	eference Type No.	18 ~	Code · · · · · · · · · · · · · · · WF010-TG010		To-do Group Template Details			
Re	eference Type Description	Customer	Description · · · · · · Department Checks		No. Of Workflow Allocations	0		
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	To-do	WF010-TD030	Review Dimension and Posting Group Setup					
	To-do	WF010-TD040	Credit and Background Check					
	→ To-do	WF010-TD050	✓ Setup Shipping Fields					
			Setup Shipping Field	5				



- 1) Click on Templates
- 2) Click on To-dos





1) Click on +New

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To-	dos: All 🗸 🗍	,	🕂 New 📋 Delete	🕾 Field Examination 🛛 🕌 Decision	🚰 Conditional Responsibilities	🚯 Keyword Defin	itions 🛛 🐨 Status C	Changes 🛛 🌄 Field Modif	fications 🛛 🐻 Decision I	ield Modifications		7	∎ ① [۳ م
		Reference Type No.↑	Reference Type	Create a new entr	y. Description	Туре	Team Code	Employee Code						
		18	: Customer	WF010-TD010	Check mandatory fields	Field Examin		BA	() Details	Attachments ())			
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		18	Customer	WF010-TD030	Review Dimension and Posti	Manual Com	FINANCE		io-do iempi	ate Details				
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		18	Customer	WF010-TD050	Setup Shipping Fields	Manual Com		AH	No. Of Field Moo	lifications		0		
									No. Of Group All	ocations		0		
									No. Of Workflow	Allocations		1		
									No. Of Open To-	dos		0		
									nor or open to					



1) General:

Enter Reference Type No. \rightarrow 18 Enter Code \rightarrow WF010-TD060 Enter Description \rightarrow Approve New Customer





1) **Responsibility:** Enter Employee Code \rightarrow AH





1) Time Frame:

Use look up value in field Source Type and select To-do Group Enter Source Code \rightarrow WF010-TG010 Enter Duration Date Calculation \rightarrow 2D Enter Critical Date Calculation \rightarrow -1D

- 2) Criteria: Enter Type → Manual Completion
- 3) Close PAGE





1) Click on +New

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Workflows Synchro	nous Workflows To	-do Groups To-dos											焓
To-dos: All 🗸		🔋 Delete 🛛 🖷 Field Examination	🕌 Decision 🕴	Conditional Responsibilities 🛛 🐺 H	Keyword Definitions 🛛 🖘	Status Changes	Reld Modifications	R Decision Field Modific	ations		7 ≡ (DD	× ⁴
To-dos: All ∨	P Search + New Reference Type No. 1 18 1 18 1 18 1 18 1 18 1	Delete	*** Decision ** *** ******************	Conditional Responsibilities Conditional Responsibilities Conditional Responsibilities Conditional Review Dimension and Posting Grad Credit Application Review Dimension and Posting Grad Credit and Background Check Setup Shipping Fields Approve New Customer	Keyword Definitions C	ANCE ES	Ro Field Modifications	Decision Field Modific Decision Field Modific Details Details Details Attac To-do Template Det No. Of Conditional Resp. No. Of Field Modifications No. Of Group Allocations No. Of Group Allocations No. Of Open To-dos	hments (0) ails	0 0 0 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0			, ^x



1) General:

Enter Reference Type No. \rightarrow 18 Enter Code \rightarrow WF010-TD070 Enter Description \rightarrow Send Engagement Letter





1) **Responsibility:** Enter Employee Code \rightarrow BD

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VF010-1D070 · Sena	Engagement Le	llei				
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General				Mehr anzeigen	ils 🔋 Anhänge (0)	
Reference Type No.		18 🗸	Priority Normal	✓ To-do	Template Details	
Reference Type Description	Customer			No. Of C	onditional Resp.	0
Code	WF010-TD070			No. Of F	eld Modifications	0
Description	Send Engagement Letter			No. Of C	roup Allocations	0
				No. Of V	orkflow Allocations	0
				No. Of I	J-dos	0
To-do Template Comments Manag	ge				pen lo-dos	0
		- · ·				
Date		Comment				
Responsibility				Mehr anzeigen		
Team Code		~	Employee Code · · · · · · · · · · · · · · · · · · ·	~		
Team Name · · · · · · · · · · · · · · · · · · ·			Employee Name			



1) Time Frame:

Use look up vaue in field Source Type and select To-do Enter Source Code \rightarrow WF010-TD060 Enter Duration Date Calculation \rightarrow 1D





- 1) Criteria: Enter Type → Manual Completion
- 2) Close page





- 1) Click on Templates
- 2) Click on Workflows

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Т	o-dos: All 🗸	Search	🕂 New 🔋 Delete 🖷 Field Exa	mination 💕 Decisio	n 🍄 Conditional Responsibilities	Keyword Definitions	🖘 Status	Changes 🛛 🐻 Field Mo	odifications 🛛 🐻 Decisio	n Field Modifications	•	\ ≡	<u>о</u> Д	<i>≈</i> [⊭]
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		18	Customer	WF010-TD0	Setup Shipping Fields	Manual Co		AH	No. Of Field Mo	odifications		0		
		18	Customer	WF010-TD0	Approve New Customer	Manual Co		AH	No. Of Group A	ulocations		1		
		18	Customer	WF010-TD0	Send Engagement Letter	Manual Co		BD	No. Of To-dos	W / MOCOLIOTIS		1		



1) Click on Edit





1) Workflow Templates:

- Second line
 - Enter Type \rightarrow To-do
 - Enter Code → WF010-TD020
- Third line

Enter Type \rightarrow To-do Group Enter Code \rightarrow WF010-TG010 Fourth line Enter Type \rightarrow To-do Enter Code \rightarrow WF010-TD060 Fifth line Enter Type \rightarrow To-do Enter Code \rightarrow WF010-TD070

2) Close PAGE

DIT - WOF	RKFLOW TEMPLATE CARD - WF010 · NEV	CUSTOMER WO	RKFLOW		(2) + II		√ SAVED	ದ್ ಸ್
WF01	10 · New Customer V	Vorkflow			C			
rocess	Report More options							0
General	l					Show more	Details Attachments (0)	
leference '	Type No.			18 V No. Of Use	Conditions · · · · · · · · ·	0	Workflow Template Details	
leference ⁻	Type Description Custor	ner		REACTION			No. Of Use Conditions	0
ode · · · ·		1		Reaction or	n Condition Discontinuation · · Delete	•	No. Of Workflows	0
				Reaction or	Deleted Source	•	No. Of Open Workflows	0
Vorkflow [*]	Template Manage Line F	ewer options				£		
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Vorkflow →	Template Manage Line Fr To-do To-do To-do To-do Group To-do To-do To-do	ewer options	Code WF010-TD010 WF010-TD020 WF010-TG010 WF010-TD060 WF010-TD070	WF010-TD020	Description Check mandatory fields Attached Credit Application Department Checks Approve New Customer Send Engagement Letter			
Vorkflow →	Template Manage Line Fr To-do To-do To-do Group To-do To-do To-do	awer options	Code WF010-TD010 WF010-TD020 WF010-TG010 WF010-TD060 WF010-TD070	WF010-TD020	Description Check mandatory fields Attached Credit Application Department Checks Approve New Customer Send Engagement Letter			



1) Click on the Burger Menu





1) Click on Reference Types





1) Click on Edit





1) General: Use look up value in field Default Workflow Template Code and select WF010

65 Business Central					Sandbox		0 Ø	1
EDIT - REFERENCE TYPE CARD - CUSTOME	R	(2) + 11				√ SAVED	ت _م د	
Customer		<u> </u>						
Navigate							0	
General			Show n	Reference	Type Details			
No	18	Differing Table Description (Editing Pa		No. Of Work	flows		0	
No. Description	Customer	Default Workflow Template Code	WF010	∨ No. Of Open	Workflows		0	
Description	Customer	Buffer Time on Function Call Server	10 seconds	ook up value				
Editing Page ID	21	Automatic Workflows						
Editing Page Description	Customer Card	Ignore from Check Automatic Workflo						
Differing Table ID (Editing Page)	0 ~	Ignore from Check Workflow Status U						
Grouping								
Workflow Group Field Table ID	0 ~	Workflow Group Field ID	0					
		Workflow Group Field Description						



- 1) Go back to the Role Center
- 2) Click on Templates
- 3) Click on Workflows





1) Click on Edit





- 1) Click on More Options
- 2) Click on Actions
- 3) Click on Functions
- 4) Click on Visual View Network Diagram

WORKFLOW	W TEMPLATE CARD WORK DATE: 06.04.2020					+ 🗊				√ SAVED	с ,×	×
WF010	0 · New Customer Work	kflow			\bigcirc							
Process	Report Actions Navigate Report	rt Fewer opt	ions								0	D
∮ Functio	tions ~										-12	×
🎄 Expande	ded View	18. 🗸	Description	New Customer Workf	Row	REACTION			Workflow Template Details			
🙏 Expande	ded View - Date Reference		No. Of Use Conditions		0	Reaction on Condition D	Delete	•	No. Of Use Conditions		0	
🚰 Visual V	View - Network Diagram		No. Of ose conditions		v	Reaction on Deleted Source	Delete		No. Of Workflows		0	
Coue	WEUD								No. Of Open Workflows		0	
Workflow Te	Template Manage More options							Ø				
Workflow To	Template Manage More options		(c.t.		Description			Ø				
Workflow T	Template Manage More options	:	Code WE010-TD010		Description	alds						
Workflow Te	Template Manage More options		Code WF010-TD010 WF010-TD020		Description Check mandatory f Attached Credit Ac	elds		Ø				
Workflow Te	Template Manage More options Type To-do To-do To-do To-do To-do	:	Code WF010-TD010 WF010-TD020 WF010-TG010		Description Check mandatory f Attached Credit Ap Department Check	elds						
Workflow Te	Template Manage More options Type To-do To-do To-do To-do To-do To-do	:	Code WF010-TD010 WF010-TD020 WF010-TG010 WF010-TD060		Description Check mandatory f Attached Credit Ap Department Check Approve New Cust	elds Dication						
Workflow Tr	Template Manage More options Type To-do To-do To-do To-do To-do To-do To-do To-do	:	Code WF010-TD010 WF010-TD020 WF010-TD020 WF010-TD050 WF010-TD070		Description Check mandatory f Attached Credit Ap Department Check Approve New Cust Send Engagement	elds plication mer .etter						
Workflow Tr	Template Manage More options Type To-do To-do To-do To-do To-do	:	Code WF010-TD010 WF010-TD020 WF010-TD050 WF010-TD060 WF010-TD070		Description Check mandatory 1 Attached Credit Ap Department Check Approve New Cust Send Engagement	elds plication omer 						
Workflow Tr	Template Manage More options Type To-do To-do To-do To-do To-do To-do To-do	:	Code WF010-TD010 WF010-TD020 WF010-TD010 WF010-TD060 WF010-TD070		Description Check mandatory 1 Attached Credit Ap Department Check Approve New Cust Send Engagement	elds plication mer 						
Workflow Tr	Template Manage More options Type To-do To-do To-do To-do To-do To-do To-do To-do	:	Code WF010-TD010 WF010-TD020 WF010-TD010 WF010-TD060 WF010-TD070		Description Check mandatory 1 Attached Credit Ap Department Check Approve New Cust Send Engagement	elds plication omer etter						
Workflow Tr	Template Manage More options Type To-do	ē	Code WF010-TD010 WF010-TD020 WF010-TD020 WF010-TD020 WF010-TD020 WF010-TD070 Differing Table ID (Editin		Description Check mandatory 1 Attached Credit Ap Department Check Approve New Cust Send Engagement	elds plication 						



1) Final Workflow Template







- 1) Click on Tell me what you want to do
- 2) Search for Customer List
- 3) Click on Customers

Dynamics 365	Business Central										Sandbox	Q	Q	Ø	?	К
	CRONUS USA	, Inc. Setup	o∨ Te	TELL ME WHAT YOU WANT TO I	00				\times							
	Workflows Wor	kflow Archives	Workflov	Customers						ueue More	e~			2		
	Activities			Go to Pages and Tasks				Show all (1	12)							
	Workflow Adm	ninistration Act	ivities	> Customers			Lists	I						_		
	FUNCTION CALL SEP	RVER QUEUE		> Create Contacts from Cus	tomers		Tasks			L TO-DOS						
	ERRORS	PROCESSED MANUALLY	UNPRO	> Customer Disc. Groups			Administration	ı		O BE OMPLETED						
	0	0	0	Go to Reports and Analysis				Show all (2	23)	D						
	>	>	>	E Customer Labels			Reports and A	nalysis								
	ALL WORKFLOWS			E Customer Listing			Reports and A	nalysis		GET STARTED						
	OPEN	CRITICAL	ON HOL	Customer Register			Reports and A	nalysis								
	\cap	\cap	\cap	Didn't find what you were look	ing for? Try <mark>explo</mark> r	ing				C						
					New Employee	New Team	New Reference Type	New Workflow Template	1	Replay Getting Started						
	>	>	>	>												
	To-do Activitie му то-доs	s∨			ALL MY TO-DO	S										
	WAITING	NOW	CRITICAL	OVERDUE	TO BE											



1) Click on +New





- 1) Click on B2B
- 2) Click on Ok





1) General:

Enter Name \rightarrow e.g. agilesGroup

2) Close all pages and go back to the Role Center

CUSTOMER CARD WORK DA	TE: 06.04.2020	 + 		✓ SAVED 🗖	î "K
C00030					
New Document Request	Approval Navigate Custome	er More options			()
General			Show more	Details Attachments (0)	
No	C00030	··· Credit Limit (\$)	0,00	Customer Picture \lor	1
Name · · · · · · · · · · · · · · · · · · ·	agilesGroup	Blocked · · · · · · · · · · · ·	•	\frown	
Balance (\$)		0,00 Total Sales	0,00	$\langle \bigcirc \rangle$	
Balance Due (\$)		0,00 Costs (\$)	0,00	(\Box)	
Address & Contact >		0.00 Costs (\$)	0,00		1
Address & Contact > Invoicing		0.00 Costs (\$)	0.00 Show less	Sall to Customer Sales History	
Address & Contact > Invoicing Customer		0,00 Costs (\$) ·····	0.00	Sell-to Customer Sales History	-
Balance Due (\$) Address & Contact > Invoicing Customer Tax Registration No.		0,00 Costs (\$) ·····	0.00 Show less	Sell-to Customer Sales History	-
Balance Due (\$)		0,00 Costs (\$) · · · · · · · · · · · · · · · · · · ·	0.00 Show less	Sell-to Customer Sales History	-
Balance Due (\$) Address & Contact > Invoicing Customer Tax Registration No. GLN		0,00 Costs (\$) POSTING DETAILS Gen. Bus. Posting Group VAT Bus. Posting Group DOMESTIC	0.00 Show less	Sell-to Customer Sales History	



1) All Workflows: Click on Activity Open





1) Show new created workflow

Dynai	mics 3	65 Business Cen	tral						Sandbox	Q D	Ø	?	К
	\leftarrow	OPEN WORK DA	TE: 06.04	4.2020							î " ^k		
		✓ Search M	lanage	🚺 Open in f	Excel					7 =			
		Status	(Code	Description	Reference Type Description	Keywords	Start Date	Earliest Start Date	End Date (Act	ual)		
		0	: \	WF000003	New Customer Workflow	Customer	C00030,agilesGroup	24.02.2020	24.02.2020	02.03.2020			



- 1) Click on Manage
- 2) Click on Edit

OPEN WOR	K DATE: 06.04.2020							, ^K	
,	Manage 🚺 Open in I	Excel					\ ≣	•	
🖊 Edit	🛱 View 📋 Delete							-13	
	Open the selected row in edit m	node.					v		
U	: WF000003	New Customer Workflow	Customer	C00030,agilesGroup	24.02.2020	24.02.2020	02.03.2020		



1) Click on Expanded View

WORKFLOW CARD WOR	K DATE: 06.04.2020			+ 💼		~ S/	AVED 🖬 🦯 🖉
WF000003 ·	New Custon	ner Workflow	Ŭ				
🔨 Status Update	Expanded View 👂 Sl	now Source More options					0
General	Shows a structured overview of all added to-dos and to-do groups for that workflow. (Shift+Ctrl+N) Show more						D)
Code · · · · · · · · · · · · · · · · · · ·	WF000003	Identifie	er Archived · · · · · ·			Workflow Details	
Description	New Customer Wo	rkflow Start Da	Start Date			Template Code	WF010
Reference Type Descripti.		Earliest	Start Date	rt Date 24.02.2020		Workflow Group Code	
Kenwords	COOD30 agilesGrou	n End Dat	e (Actual)	02 03 2020		No. Of Critical To-dos	0
Couso,agrieso						No. Of Open To-dos	1
Open · · · · · · · · · · · · · · · · · · ·		Last Status Update On 24.02.2020				No. Of To-dos	7
On Hold		Last Sta	Last Status Update At 10:58:14			Cause of Status To-dos	1
						Status Name	
Workflow Manag	e Line Fewer opt	ions			E		
Туре	Code	Description	Status	Earliest Start Date	End Date (Actual)		
→ To-do	WF000003-A001	Check mandatory fields		24.02.2020	25.02.2020		
To-do	WF000003-A002	Attached Credit Application	<u>.</u>	25.02.2020	26.02.2020		
		WF000003-AG002 Department Checks					


1) Expanded View shows all To-dos of the Live Workflow in their current Status

Dynamics 365 Business Central Sandbox Q												ô 3	
	\leftarrow	CUSTOMER WF000	0003 NEW CUSTOMER \	WORKFLOW - E	XPANDED VIEW	WORK DATE: 06.04.2020					ď	۶ ^۴	
		Show Source	蒙 Card Mor	re options								∇	
		😞 Grouping		Status	Code	Description	Reference Type Description	Keywords	To-do Type	Team Co	ode	Employe Code	e
	\rightarrow	 ✓ 1 	:	0	WF000003-A	New Customer Workflow	Customer	C00030, agiles Group					
		1.1		•	WF000003-A	Check mandatory fields	Customer	C00030,agilesGroup	Field Examination			BA	
		1.2		0	WF000003-A	Attached Credit Application	Customer	C00030,agilesGroup	Manual Completion			AH	
		✓ 1.3		•	WF000003-A	Department Checks	Customer	C00030, agiles Group					
		1.3.1		•	WF000003-A	Review Dimension and Po	Customer	C00030, agiles Group	Manual Completion	FINAN	CE		
		1.3.2		0	WF000003-A	Credit and Background Ch	Customer	C00030, agiles Group	Manual Completion	SALES			
		1.3.3		0	WF000003-A	Setup Shipping Fields	Customer	C00030, agiles Group	Manual Completion			AH	
		1.4		•	WF000003-A	Approve New Customer	Customer	C00030, agiles Group	Manual Completion			AH	
		1.5		0	WF000003-A	Send Engagement Letter	Customer	C00030,agilesGroup	Manual Completion			BA	
													_



- 1) Close all pages and go back to the Role Center
- 2) To Dos:

Click on Activity Now

Activities								
Workflow A	Administration A L server queue	activities \checkmark	TO-DOS		_		ALL TO-DOS	
ERRORS	PROCESSED MANUALLY	UNPROCESSED	WAITING	NOW	CRITICAL	OVERDUE	TO BE COMPLETED	
0	0	0	6	1 Spe	cifies the number of	to-dos that are in time. Dependin	g of the workflow setup, open or t	o be completed to-dos are display
>	>	>	>	>	>		>	
ALL WORKFLO	WS			NEW			GET STARTED	
OPEN	CRITICAL	ON HOLD	ARCHIVED			_LL		
1	\cap	\bigcirc	\cap	T	T	T T		
				New Employee	New Team N	Vew Reference New Workflow Template	Replay Getting Started	



1) Click on Examine Fields

Soo Business	Lentral							Sandbo	x q	Û	Ø
NOW WORK	DATE: 06.04.202	20									3 74
✓ Search	🐯 Edit List	📋 Delete 🛛 🗸 Manually C	omplete 📑 Examine Fields	🗄 Store Documents 🖻	Examine Documents	🕌 Make Decision	1 0 U	pdate Status		7 :	0
Status	No.	Description	Reference Type Description	Keywords	To-do Type	Team					
\rightarrow	: WFO	00003 Check mandatory fie	lds Customer	C00030, agiles Group	Field Exami	0 Det	ails	I Attachm	ents (0)		
						Workfl	low De	tails			
						Code				WF0000	003
						Templat	te Code			WF	010
						Descrip	tion	Ne	w Custom	er Workf	ow
						Workflo	w Grou	p Code			- 1
						Start Da	ite			24.02.20	20
						End Dat	te (Actu	al)		02.03.20	20
						On Hold	d				No
						Last Sta	tus Upd	ate On		24.02.20	20
						Last Sta	tus Upd	ate At		10:58	:14
						Status N	Vame				- 1
						To-do	Details				



1) Add a new Column → Field Value

Dynamic	s 365	Business Co	entral					Q	0 ©)? 🥊	
~	- 18	· WF010-C01) ARBEITSDA	TUM: 06.04.2020			~	GESPEICHERT	с,	<i>.</i>	
	Т	able C	onditio	n Line Status						- 1	
		O Suchen	🐺 Edit List	♦ Edit 🛛 🖉 Open in Excel Weitere Optionen					7 =		
		Status		Table Description	Field Description	Filter	Field Value			ן ר	
		→ E	2 :	Customer	Name	<>"	agilesGroup				
			2	Customer	Customer Posting Group	<>"	DOMESTIC				
				Customer	Gen. Bus. Posting Group	<>"	DOMESTIC				
				Customer	VAT Bus. Posting Group	<>"					
				Customer	Credit Limit (\$)	>0	0				



- 1) First three lines all Conditions are met (see Status tick = yes)
- 2) Enter the missing field values in the lines with the Status tick = no
- 3) Fourth line: Use look up value in Field Value

و مر	Search	🐯 Edit	List 🔖 Edit 🚺 Open in Excel	More options		V I	=
	Status		Table Description	Field Description	Filter	Field Value	
	4		Customer	Name	<>"	agilesGroup	
	4		Customer	Customer Posting Group	<>"	DOMESTIC	
	4		Customer	Gen. Bus. Posting Group	<>"	DOMESTIC	
\rightarrow		1	Customer	VAT Bus. Posting Group	<>"		
			Customer	Credit Limit (\$)	>0	0	



1) Click on +New





- 1) Enter Code \rightarrow Domestic
- 2) Enter Description \rightarrow Domestic
- 3) Click on Ok





- 1) Use Look up Value in Field Value
- 2) Select Domestic

∕⊃ s	earch	😨 Edit List 🛛 🔾 Edit 🛛 💵 Open in Excel	More options		▽ 〓
	Status	Table Description	Field Description	Filter	Field Value
		Customer	Name	<>"	agilesGroup
	4	Customer	Customer Posting Group	<>"	DOMESTIC
	d.	Customer	Gen. Bus. Posting Group	<>"	DOMESTIC
\rightarrow	1	: Customer	VAT Bus. Posting Group	<>"	DOMESTIC ····
		Customer	Credit Limit (\$)	>0	0 Look up value



1) Fifth line: Enter Field Value \rightarrow 10

✓ Search	🐯 Ec	dit List 🔹 Edit 🛛 🚺 Open in Excel	More options		\\ ≣
Status		Table Description	Field Description	Filter	Field Value
Juius		Cuctomer	Namo		
4		Customer	Customer Posting Group	<>"	DOMESTIC
ø		Customer	Gen, Bus, Posting Group	<>"	DOMESTIC
ď		Customer	VAT Bus. Posting Group	<>"	DOMESTIC
\rightarrow		Customer	Credit Limit (\$)	>0	10



- 1) Close all pages and go back to the Role Center
- 2) To-Dos: Click on the Activity Now





To close the To-do:

- 1) Select WF000003-T002
- 2) Click Manually Complete





- 1) Click on Yes
- 2) To-do is done





- 1) Close all pages and go back to the Role Center
- 2) To-Dos: Click on the Activity Now





- 1) Select the first To-do
- 2) Click on Manually Complete

Dynamio	s 365 Business Central			Sandbox C	
~	- NOW				, □ , , [⊭]
	🔎 Search 🐺 Edit List 🏾 📋 De	elete 🗸 Manually Complete 📑 Examine Field	ds 🛯 🛅 Store Documents 🛛 🗟 Examine Documents 🍟	Make Decision 🙂 Update Status …	$\nabla \equiv 0$
	Stat No.	Description Reference Type Descrip	tion Keywords To-do Type Team Code	Ť	
	→ 🕕 : WF000006-T003	Review Dimension and Po Customer	C00060,agilesGroup 2 Manual Co FINANCE	① Details ① Attachments (0)	
	WF000006-T004	Credit and Background Ch Customer	C00060,agilesGroup 2 Manual Co SALES		
	WF000006-T005	Setup Shipping Fields Customer	C00060,agilesGroup 2 Manual Co	Workflow Details	
				Code	WF000006
				Template Code	WF010
				Description New Custo	mer Workflow
				Workflow Group Code	
				Start Date	24.02.2020
				End Date (Actual)	29.02.2020
				On Hold	No
				Last Status Update On	24.02.2020
				Last Status Update At	15:58:05
				Status Name	Now To-do
					_
				To-do Details	



- 1) Click Yes
- 2) To-do is done
- 3) Remain in the Page





- 1) Mark both To-dos (with STRG+click)
- 2) Click on Manually Complete

Dyna	mics 36	5 Business Central							Sandbox	Q	Q	Ø	? 🚺	к
	\leftarrow	NOW										7 ⁴		
		🔎 Search 🐺 Edit List 🏾 📋 Delete	✓ Manually Complete	書 Examine Fields	🖞 Store Documents	🗟 Examine Docume	nts 🕌 Make	Decision 🛛 🕙 U	pdate Status 🛛 …		7 ≡	(i)		
		Stat No.	Con	pletes the to-do manually. Reference Type Descrip] tion Keywords	To-do Type	Team Coc							
		 ✓ ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●	Credit and Background C Setup Shipping Fields	h Customer Customer	C00060,agiles C00060,agiles	sGroup 2 Manual Co sGroup 2 Manual Co	o SALES	(i) Details	Attachments	(0)				
					-			Workflow De	tails					
								Code		1	WF00000	5	- 1	
								Template Code			WF01			
								Description	New Cu	istomer	Workflov	v		
								Workflow Group	o Code					
								Start Date		2	24.02.202			
								End Date (Actua	al)	2	29.02.202			
								On Hold			N			
								Last Status Upd	ate On	2	24.02.202			
								Last Status Upd	ate At		15:58:0	5		
								Status Name		Ν	low To-de			
								To-do Details				-		



- 1) Click Yes
- 2) Both To-dos are done
- 3) Close all pages and go back to the Role Center





1) To-Dos: Click on Activity Now

Workflow	Administration A	Activities \vee	TO-DOS				ALL TO-DOS	
ERRORS	PROCESSED	UNPROCESSED	WAITING	NOW	CRITICAL	OVERDUE	TO BE COMPLETED	
0	0	0	1	1	0	0	2	
>	>	>	>	>	>	>	>	
ALL WORKFLC	IWS			NEW			GET STARTED	
OPEN	CRITICAL	ON HOLD	ARCHIVED	+	+ -	+ +		
1	0	0	0	New Employee	New Team New F	Reference New Workflow	Replay Getting	
>	>	>	>		Туре	Template	Started	



1) Click on Manually Complete





- 1) Click Yes
- 2) Go back to Role Center





1) To-Dos: Click on Activity Now

Workflow	Administration A	Activities ~						
ERRORS	PROCESSED	UNPROCESSED	WAITING	NOW	CRITICAL	OVERDUE	TO BE	
0		0	0	1	0	0	COMPLETED	
>	>	>	>	>		>	>	
ALL WORKFLO	WS			NEW			GET STARTED	
OPEN	CRITICAL	ON HOLD	ARCHIVED	+	+ -	- +		
1	0	0	0	New Employee	New Team New R	eference New Workflow	Replay Getting	
	-	-	<u> </u>		Туре	Template	Started	



1) Click on Manually Complete





1) Click Yes

Dynami	cs 365 Business Central		Sandbox Q D @ ?	К
	NOW			
	🔎 Search 🛭 😨 Edit List 🍵 Delete 🖌 Manually Complete	🖷 Examine Fields 📗 Store Documents 🗟 Examine Documents 🂕 Make	Decision 🙂 Update Status … 🛛 🏹 🔳 🕕	
	Stat No. Description I	Reference Type Description Keywords To-do Type Team Code 🕈		
	ightarrow 0 : WF000006-T007 Send Engagement Letter	Customer C00060,agilesGroup 2 Manual Co	① Details 🛛 Attachments (0)	
			Workflow Details	
			Code WF000006	
		Do you want to close the 1 selected open To-do(s)?	Template Code WF010	
			Description New Customer Workflow	
			Workflow Group Code	
		Yes No	Start Date 24.02.2020	
			End Date (Actual) 25.02.2020	
			On Hold No	
			Last Status Update On 24.02.2020	
			Last Status Update At 16:07:15	
			Status Name Now To-do	
-			To-do Details	



- 1) Go back to Role Center
- 2) Click on Workflows

Workflow A	Administration A L SERVER QUEUE	Activities \checkmark	TO-DOS				ALL TO-DOS	
ERRORS	PROCESSED MANUALL <u>Y</u>	UNPROCESSED	WAITING	NOW	CRITICAL	OVERDUE	TO BE COMPLETED	
0	0	0	0	0	0	0	0	
>	>	>	>	>	>	>	>	
ALL WORKFLO	WS			NEW			GET STARTED	
OPEN	CRITICAL	ON HOLD	ARCHIVED	+	+ +	- +		
0	0	0	0	New Employee	New Team New R	Reference New Workflow	Replay Getting	
>			>		Туре	Template	Started	



1) Workflow is done

COUNUS USA, Inc. Stepper Stepp	Dynamic	s 365 Busi	iness Ce	entral								Sandbox Q	₽ @ ?	? 5
Workflows: AI P Search Dete Big Open In Section Keywords Sair Date Data Data <th></th> <th></th> <th>CRONI</th> <th>JS USA, Inc.</th> <th>Setup \lor Templates \lor</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>-</th> <th></th>			CRONI	JS USA, Inc.	Setup \lor Templates \lor								-	
Set Code Decription Reference Type Decription Keywords Stat Date Different Different<	Wo	rkflows:	All ~	م ہ	Search 📋 Delete 🛛 🚺 🤇	Open in Excel						∇	≣ 0 📕 🤈	, ²
Image: Wronowie Workflow Customer C00060.agilesGroup 2 24.02.202 24.02.202 24.02.202 24.02.202 24.02.202 24.02.202 Contraction Image: Contraction <t< td=""><td>Stat</td><td>tus</td><td></td><td>Code</td><td>Description</td><td>Reference Type Description</td><td>Keywords</td><td>Start Date</td><td>Earliest Start Date</td><td>End Date (Actual)</td><td></td><td></td><td></td><td></td></t<>	Stat	tus		Code	Description	Reference Type Description	Keywords	Start Date	Earliest Start Date	End Date (Actual)				
Warkflow Details Template Code Weindlow Groups On Hold No No. Of Critical To-dos 0 No. Of Critical To-dos 7 Cause of Status To-dos 7 Last Status Update At 160852 Status Update At 160852 Tome Tome	0		:	WF000006	New Customer Workflow	Customer	C00060,agilesGroup 2	24.02.2020	24.02.2020	24.02.2020	() Details	Attachments	(0)	
Image: Code W600 Workflow Group Code On Hold No On Hold No Of Critical To-dos O No. Of Critical To-dos O No. Of Open To-dos O No. Of To-dos 7 Cause of Status To-dos 7 Last Status Update On 24/02.2020 Last Status Update At 16:08:52 Status Nume Done Done											Workflow De	tails		
Image: Section of Status Participation No Mindid No No. Of Critical To-dos 0 No. Of Open To-dos 0 No. Of To-dos 7 Cause of Status To-dos 7 Last Status Update On 24.02.2020 Last Status Update At 1609:52 Status Name Done											Template Code Workflow Grou	n Code	WF010	
No. Of Critical To-dos 0 No. Of Open To-dos 0 No. Of To-dos 7 Cause of Status To-dos 7 Last Status Update On 24.02.2020 Last Status Update At 16:08:52 Status Name Done											On Hold		No	
No. Of Open To-dos 0 No. Of To-dos 7 Cause of Status To-dos 7 Last Status Update On 24.02.2020 Last Status Update At 16:08:52 Status Name Done											No. Of Critical 1	īo-dos	0	
No. Of To-dos 7 Cause of Status To-dos 7 Last Status Update On 24.02.2020 Last Status Update At 16:08-52 Status Name Done											No. Of Open To	-dos	0	
Cause of Status To-dos 7 Last Status Update On 24.02.2020 Last Status Update At 16:08:52 Status Name Done											No. Of To-dos		7	
Las Status Update On 24.02.202 Las Status Update At 16.08.52 Status Name Done											Cause of Status	To-dos	7	
Last Status Update At 1608:52 Status Name											Last Status Upd	ate On	24.02.2020	
Status Name Done											Last Status Upd	ate At	16:08:52	
📲 🔎 Zur Suche Text hier eingeben 🖽 🎼 💿 🍋 🔚 🕐 🖓 🚱 👘 🐨 🗞 🎯 🔷 ^ 🗈 🤅 d) 1609											Status Name		Done	
🐨 🗡 Zur Suche Text hier eingeben 🛛 🖽 🍕 🧿 🍋 🐂 🚱 🖝 🎝 🖬 🤻 💁 🌚 🔿 🔨 🔿 🖓 🗉 🚱 🕬														•
載 🔎 Zur Suche Text hier eingeben 日 日 🚓 🧿 😋 🧰 😰 🖓 📓 🖓 📓 😵 🥥 🔷 ^ 🗈 候 🜗 2002 3000 易														
# 🔎 Zur Suche Text hier eingeben 日日 味 🌀 全 🥫 争 🚾 🖫 隊 祭 🧕 🗞 🔗														
# 🔎 Zur Suche Text hier eingeben 日 日 🤹 💿 全 🥫 争 🚾 🖫 緑 🧐 🚱 🤭 へ 🗈 係 (*) 2402,2020 長														
🖽 🔎 Zur Suche Text hier eingeben 🛛 🖾 🤹 🧿 🤤 🧰 🥬 🐙 🧏 🖬 🤗 🦉 🚱 🔷 🔨 🔊 🖉										_				
24.02.2020	•	Q Zur S	Suche 1	Text hier ein	geben 🗎	i % 📀 🤤	🥅 🐠 🐖 🎙	📕 📑 🥰	5	<u></u>		^ D	(信:09 24.02.2020	5



Scenario 2 Stop Posting



Scenario 2: Stop Posting – Synchronous Workflow

- 1) Click on Templates
- 2) Click on Synchronous Workflow





Scenario 2: Stop Posting – Workflow Template

1) Click on +New





Scenario 2: Stop Posting – Workflow Template

1) General:

Use look up value in field Reference Type No. and select 38 Enter Code \rightarrow SWF010 Enter Description \rightarrow Stop Posting if Purchaser is missing

SWF010						
Y Use Conditions 🛛 🗔 Keywor	d Definitions More options					(i)
General				Show more	① Details 🛛 Attachmen	nts (0)
Reference Type No.	38 ~	Code · · · · · ·	SWF010		Workflow Template Det	ails
Reference Type Descripti • Pu	irchase Header	Description · · · · ·	Stop Posting if P	Purchaser is missing	No. Of Use Conditions	0
					No. Of Workflows	0
Synchr. Modifications Subform	Manage			System	No. Of Open Workflows	0
Synchr. Modifications Subform Description	Manage Field ID Field Description	Value Type	Fix Value Input	System Value	No. Of Open Workflows	0
Synchr. Modifications Subform Description → Purchase Header	Manage Field ID Field Description	Value Type Fix Value	Fix Value Input	System Value	No. Of Open Workflows	0
Synchr. Modifications Subform Description → Purchase Header	Manage Field ID Field Description	Value Type Fix Value	Fix Value Input	System Value	No. Of Open Workflows	0



Scenario 2: Stop Posting – Workflow Template

1) Event Triggers:

Activate Hook-in

Use look up value in field Hook-in Code and select Before Purchase Receive Post

Use look up value in field Break Condition Code

			5 1113511	'9				
Y Use Conditions 🗔 Keyword	Definitions	More options						0
Description	Field ID	Field Description	Val	lue Type	Fix Value Input	System	① Details ① Attachments (0)	
→ Purchase Header			Fix	Value	in rate riper	value	Workflow Template Details	
							No. Of Use Conditions	0
							No. Of Workflows	0
							No. Of Workflows No. Of Open Workflows	0 0
				_		-	No. Of Workflows No. Of Open Workflows	0
Event Triggers						Show more	No. Of Workflows No. Of Open Workflows	0
Event Triggers)		By Hook-ir	n		Show more	No. Of Workflows No. Of Open Workflows	0
Event Triggers Manually Only			By Hook-ir Hook-in Co	n	BEF.PURCHRCPTP	Show more	No. Of Workflows No. Of Open Workflows	0
Event Triggers Manually Only			By Hook-in Hook-in Co	n · · · · · · · · · · · · · · · · · · ·	BEF.PURCHRCPTP	Show more	No. Of Workflows No. Of Open Workflows	0
Event Triggers Manually Only On Insert On Modify On Delate			By Hook-in Hook-in Co Break Cond	n ode dition Code	BEF.PURCHRCPTP	Show more	No. Of Workflows No. Of Open Workflows	0



1) Click on +New





1) General:

Enter Code \rightarrow SWF010-C020

Enter Description → Stop Posting

2) Table Condition:

Enter Type \rightarrow Field

Enter Table ID →38

Enter Field ID \rightarrow 43

Enter Filter \rightarrow "

3) Go back one page

TABLE CONDITION CA	RD WORK DATE: 06.04.2020		Ø	+ 🛍				√ SA'	VED	3 74
SWF010-C	020 · Stop Posting									
Navigate										
General										
Table ID · · · · · · · ·			38	Description		Sto	p Posting			
Table Description · · ·	Purchase Head	er		Туре		Bre	ak			
Code · · · · · · · · · · · ·	SWF010-C020									
Table Condition	Manage More options									63
Туре	Table ID Field ID	Field Description		Filter	Editi	ng Page ID	Editing Page Description	Dit	ffering Table ID (Editing Page)	Dif Paç
\rightarrow Field	38 43	Purchaser Code								



1) Click on Ok





1) Click on Use Conditions

	ting of Dungle	n in maintin a				- ×
SWFUIU · Stop Pos	ting if Purchase	r is missing				
▼ Use Conditions 🛛 📭 Keyword D	efinitions More option	5				Ū
Use Conditions				Sustem	① Details 🛛 Attachments (0)	
Description	Field ID Field Description	on Value Type	Fix Value Input	Value	Workflow Template Details	
\rightarrow Purchase Header		Fix Value			Worknow remplate Details	
					No. Of Use Conditions	0
					No. Of ose conditions	
				- 1	No. Of Workflows No. Of Open Workflows	0 0
Event Triggers		By Hook-in · · · · · ·		Show more	No. Of Open Workflows No. Of Open Workflows	0
Event Triggers Manually Only On Insert		By Hook-in · · · · · · · Hook-in Code · · · · ·	BEF.PURCHRCPTPOST	Show more	No. Of Workflows No. Of Open Workflows	0
Event Triggers Manually Only		By Hook-in · · · · · · Hook-in Code · · · · Break Condition Cod	BEF.PURCHRCPTPOST	Show more	No. Of Workflows No. Of Open Workflows	0
Event Triggers Manually Only		By Hook-in · · · · · · · Hook-in Code · · · · Break Condition Cod Break Condition Des	BEF.PURCHRCPTPOST	Show more	No. Of Workflows No. Of Open Workflows	0



1) Click on look up value in field Workflow Condition Code





1) Click on +New




Scenario 2: Stop Posting – Table Condition

1) General:

Enter Code → SWF010-C010

Enter Description → Only Purchase Orders

2) Table Condition:

Enter Type \rightarrow Field

Enter Table ID \rightarrow 38

Enter Field ID \rightarrow 1

Enter Filter \rightarrow Order

3) Close page

5 30	65 Business Central	I						:	Sandbox	Q	Q	Ø	?
	TABLE CONDITION CA	ARD WORK DATE	06.04.2020			+ 🛍			~	SAVED	ď	۶۴	
	SWF010-C	010 · Only	y Purchas	e Orders	\bigcirc								
	Navigate												
	General												
	Table ID · · · · · · ·				38	Description ·	On	ly Purchase Orders					
	Table Description		Purchase Hea	der		Туре	Wo	orkflow Template Use					
	Code		SWE010-C010)									
	Table Condition	Manage M	ore options			1						3	
	Table Condition	Manage M Table ID	ore options Field ID	Field Description		Filter	Editing Page ID	Editing Page Description		Differing ID (E	g Table Editing Page)	Dif Paç	
	Table Condition Type → Field	Manage M Table ID	Field ID	Field Description Document Type		Filter Order	 Editing Page ID	Editing Page Description		Differing ID (E	g Table Editing Page)	Dif Paç	



Scenario 2: Stop Posting – Table Condition

- 1) Click on Ok
- 2) Close all pages







- 1) Go to the Role Center
- 2) Click on Tell me what you want to do
- 3) Search for Purchase Order
- 4) Click on Purchase Orders





1) Click on +New

Dynamics 3	65 Business Cen	tral									Sandbox	Q	Q	Ø	?	K
¢	purchase orde View - P	ers I work date	06.04.2020 Orders											کم ڈ		
	Search + No. 1 106001 106002 106003 106004 106005	New Manage Create a ne Buy-From Buy-From Vendor No. 20000 40000 30000 20000	e Print/Send C w entry. Buy-from Vendor Nam Fabrikam, Inc. First Up Consultant Wide World Import Graphic Design Inst First Up Consultant	Order Release	Posting indor ithorizati o.	Navigate Location Code	C Open in Exce Assigned User ID	More Document 08.04.2020 09.04.2020 13.04.2020 01.05.2020 06.04.2020	Status Open Open Open Open Released	Details Details Vendor Det Vendor No. Name Phone No. Email Fax No. Contact	₪ Attachments ails ~ krystal.yc	(0) Fab 42 rk@co	100 rrikam, I 255550 ntoso.co	000 nc. 01 om		



1) General: Use look up value in Field Vendor Name

PURCHASE ORDER WORK D	ATE: 06.04.2020		Ø) + 🖻				√ SAVE	.D 🗅 🖉
106006									
Process Release Posti	ng Order Req	uest Approval Prir	nt/Send Navigate	More options					Û
General						Show more	() Details	Attachments (0)	_
Vendor Name			Vendor Invoice No.	*			Vendor Sta	tistics	
Contact			k up value vorreer Shipment No.				Vendor No.		
Document Date	06.04.2020	Ē					Balance (\$)		
							Outstanding O	rders (\$)	
							Amt. Rcd. Not	Invd. (\$)	
Lines Manage	More options					E	Outstanding In	ivoices (\$)	I
							Total (\$)		0,00
Туре	No. De	scription	Location Code	Sin Code	Quantity	Reserved Qua	Overdue Amou	unts (\$) as of 0	0,00
→ Item :							Invoiced Prepa	yment Amoun	0,00
							Payments (\$)		-
							Refunds (\$)		-
							Last Payment E	Date	-
Subtotal Excl. Tax (USD)		0,00	Total Excl. Tax (USD)			0,00	Buy-from V	/endor History	
Inv. Discount Amount (U		0,00	Total Tax (USD)			0,00		,	
							Vendor No.		



- 1) Click on Wide World Importers
- 2) Click on Ok

	🔎 Search 🖃	+ New Manage 🍱 Adv	vanced View 🛛 🚺 Ope	n in Excel			Sandbox Q	ф Ф
106006	VENDORS							-ر تا ا
Process Release Posti	No. †	Name	Location Code	Address	City	ZIP Code	Phone No.	
General	10000	Fabrikam, Inc.		10 North Lake Avenue	Atlanta	31772	4255550 ments (0)	
	20000	First Up Consultants		100 Day Drive	Chicago	61236		
Vendor Name	30000	Graphic Design Institute	_	33 Hitech Drive	Miami	37125		
Contact	→ 40000	Wide World Importers		51 Radcroft Road	Atlanta	31772		_
Document Date	50000	Nod Publishers	-	172 Field Green	Atlanta	31772		-
	•						•	-
Lines Manage						ок	Cancel	-
						Total (\$)		0,00
Туре	No.	Description	Location Code Bin	n Code Quantity	Reserved Quant	Overdue Amo	ounts (\$) as of 0	0,00
\rightarrow Item :						Invoiced Prep	ayment Amoun	0,00
						Payments (\$)		_
						Refunds (\$)		_
						Last Payment	Date	-
Subtotal Excl. Tax (USD)		0,00 T	otal Excl. Tax (USD)		0,00	Buy-from	Vendor History	
Inv. Discount Amount (U		0,00 T	otal Tax (USD)		0,00			



1) General:

Enter Type \rightarrow Item Enter No. \rightarrow 1900-S Enter Description \rightarrow Paris Guest Chair, black Enter Location Code \rightarrow MAIN Enter Quantity \rightarrow 200

365 Business Central						Sandbox	Q Q Ø
PURCHASE ORDER WORK	DATE: 06.04.202	20		+ 🖻		~S	AVED 📑 📌
106006 · Wide	e World	Importers	\bigcirc				
Process Release Pos	ting Order	Request Approval Print/	Send Navigate Mor	e options			0
General					Show more	① Details 🛛 Attachments (0)
Vendor Name	Wide World	Importers	Vendor Invoice No. 📖 🛪	:		Vendor Statistics	
Contact	Toby Rhode		Vendor Shipment No.			Vendor No.	40000
Document Date · · · · · ·	06.04.2020					Balance (\$)	18.193,10
						Outstanding Orders (\$)	11.584,10
						Amt. Rcd. Not Invd. (\$)	0,00
Lines Manage M	fore options				52	Outstanding Invoices (\$)	0,00
						Total (\$)	29.777,20
Туре	No.	Description	Location Code Bin C	de Quantity	Reserved Qua	Overdue Amounts (\$) as of 0	18.193,10
\rightarrow Item	1900-S	PARIS Guest Chair, black	MAIN	200		Invoiced Prepayment Amoun	0,00
						Payments (\$)	194.408,51
						Refunds (\$)	0,00
						Last Payment Date	12.02.2020
Subtotal Excl. Tax (USD) · ·		30.060,00	Total Excl. Tax (USD)		30.060,00	Buy-from Vendor History	
Inv. Discount Amount (U		0,00	Total Tax (USD)		0,00		
						Vendor No.	40000



1) General: Click on Show more

	ATE 0/ 0/ 000	0		(<u></u>			
PURCHASE URDER WURK I	JATE: 06.04.202	U		(a	9 +			√ 5 <i>i</i>	WED Cí 🗚
106006 · Wide	World I	Importers							
Process Release Post	ng Order	Request Approval Print/	Send	Navigate	More ontions				
	ng order	Nequest Approval Printy.	Seria	Inavigate	More options		_		
General							Show more	Details Attachments (1)
Vendor Name	Wide World I	Importers	Vendor	Invoice No.	*			Vendor Statistics	
Contact · · · · · · · · · · · · · · · · · · ·	Toby Rhode		Vendor	Shipment No.				Vendor No.	40000
Document Date · · · · · ·	06.04.2020	Ē						Balance (\$)	18.193,10
								Outstanding Orders (\$)	11.584,10
								Amt. Rcd. Not Invd. (\$)	0,00
Lines Manage M	ore options						62	Outstanding Invoices (\$)	0,00
								Total (\$)	29.777,20
Туре	No.	Description		Location Code	Bin Code	Quantity	Reserved Qua	Overdue Amounts (\$) as of 0	18.193,10
\rightarrow Item	1900-S	PARIS Guest Chair, black		MAIN		200		Invoiced Prepayment Amoun	0,00
								Payments (\$)	194.408,51
								Refunds (\$)	0,00
								Last Payment Date	12.02.2020
Subtotal Evel Tax (LISD)		30.060,00	Total E	kcl. Tax (USD)			30.060,00	Buy-from Vendor History	
Subtotal Excl. lax (OSD)		0.00	Total Ta	ax (USD)			0,00	· · ·	
Inv. Discount Amount (U		0,00						and the second sec	



1) General: Field Purchaser Code is empty

purchase order I work d 106006 · Wide	ate: 06.04.2020 World Importe	rs	 + ii		√ S	AVED 🗅 🤿 🤟
Process Release Postir	ng Order Request Appro	oval Prin	t/Send Navigate More options			Ū
General				Show less	① Details 🛛 🕅 Attachments (0)
Vendor No.	40000	\sim	Due Date	i	Vendor Statistics	
Vendor Name	Wide World Importers		Vendor Invoice No. 💠 \star		Vendor No.	40000
BUY-FROM			Purchaser Code	~	Balance (\$)	18.193,10
Address	51 Radcroft Road		No. of Archived Versions	LOOK up value	Outstanding Orders (\$)	11.584,10
Address 2					Amt. Rcd. Not Invd. (\$)	0,00
Address 2			Order Date		Outstanding Invoices (\$)	0,00
City · · · · · · · · · · · · · · · · · · ·	Atlanta		Quote No.		Total (\$)	29.777,20
State · · · · · · · · · · · · · · · · · · ·	GA		Vendor Order No.		Overdue Amounts (\$) as of 0	18.193,10
ZIP Code · · · · · · · · · · · ·	31772		Vender Shipment No		Invoiced Prepayment Amoun	0,00
Country/Pagion	115	~			Payments (\$)	194.408,51
Country/Region	03	Ť	Alternate Vendor Addres	~	Refunds (\$)	0,00
Contact No.	CT000017		Responsibility Center	\sim	Last Payment Date	12.02.2020
Contact · · · · · · · · · · · · · · · · · · ·	Toby Rhode		Assigned User ID	~		
		4-4			Buy-from Vendor History	



- 1) Click on Posting
- 2) Click on Post

65 Business Central				Sandbox	Q Q Ø
PURCHASE ORDER WORK D	ATE: 06.04.2020	(2) + III		~S	AVED 🗖 🦯
106006 · Wide	World Importers				
Process Release Posti	ng Order Request Approval Prir	nt/Send Navigate More options			0
🔯 Post 🚔 Post and F	Print 🔯 Preview Posting 🛛 🛗 Post a	and New			-12
Finalize the document Vendor No.	or journal by posting the amounts and quantities	to the related accounts in your company books. (F9) Due Date		Vendor Statistics	
Vendor Name	Wide World Importers	Vendor Invoice No. 🚥 \star		Vendor No.	40000
BUY-FROM		Purchaser Code	~	Balance (\$)	18.193,10
Address	51 Radcroft Road	No. of Archived Versions	0	Outstanding Orders (\$)	11.584,10
Addross 2		No. of Archived Versions	Ū	Amt. Rcd. Not Invd. (\$)	0,00
Address 2		Order Date		Outstanding Invoices (\$)	0,00
City	Atlanta	Quote No.		Total (\$)	29.777,20
State	GA	Vendor Order No.		Overdue Amounts (\$) as of 0	18.193,10
ZIP Code	31772	Vandas Chierrant Na		Invoiced Prepayment Amoun	0,00
Causta (Danian	115			Payments (\$)	194.408,51
Country/Region	05 V	Alternate Vendor Addres	\sim	Refunds (\$)	0,00
Contact No.	CT000017	Responsibility Center	\sim	Last Payment Date	12.02.2020
Contact · · · · · · · · · · · · · · ·	Toby Rhode ····	Assigned User ID	~		
Document Date · · · · · ·	06.04.2020	Status · · · · · · · · · Open		Buy-from Vendor History	
Posting Date	06.04.2020			Vendor No.	40000



- 1) Click on Receive
- 2) Click on Ok

106006 · Wide	World Importers		√ SAV	ED 🖬 🖈
Process Release Posti	ng Order Request Approval	Print/Send Navigate More options		
General		Show less	① Details 🛛 Attachments (0)	
Vendor No.	40000	Due Date 30.04.2020	Vendor Statistics	
Vendor Name	Wide World Importers		Vendor No.	40000
BUY-FROM		Receive	Balance (\$)	18.193,10
Address	51 Radcroft Road		Outstanding Orders (\$)	11.584,10
		Receive and Invoice	Amt. Rcd. Not Invd. (\$)	0,00
Address 2			Outstanding Invoices (\$)	0,00
City · · · · · · · · · · · · · · · · · · ·	Atlanta		Total (\$)	29.777,20
State · · · · · · · · · · · · · · · · · · ·	GA	OK Cancel	Overdue Amounts (\$) as of 0	18.193,10
7IP Code	31772		Invoiced Prepayment Amoun	0,00
		Vendor Shipment No.	Payments (\$)	194.408,51
Country/Region	US	Alternate Vendor Addres	Refunds (\$)	0,00
Contact No.	CT000017	Responsibility Center	Last Payment Date	12.02.2020
Contact · · · · · · · · · · · · · · · · · · ·	Toby Rhode	···· Assigned User ID · · · · · · · · · · · · · · · · · ·	Ruy from Vandar History	
			Buy-from venuor history	



- 1) You got a notification: The action could not be processed...
- 2) Go back one page





1) General: Use look up value in field Purchase Code and select AH

106006 · Wid	k date: 06.04.2020 e World Importer:	S	 + ii 		√ S <i>A</i>	aved 🖬 🤊
Process Release Po	sting Order Request Approv	al Prin	t/Send Navigate More options			0
General				Show less	① Details 🛛 🕅 Attachments (0))
Vendor No.	40000	\sim	Due Date		Vendor Statistics	
Vendor Name	Wide World Importers		Vendor Invoice No. 🗰 \star		Vendor No.	40000
BUY-FROM			Purchaser Code	~	Balance (\$)	18.193,10
Address	51 Radcroft Road		No. of Archived Versions	lue	Outstanding Orders (\$)	41.644,10
Address 2					Amt. Rcd. Not Invd. (\$)	0,00
Address 2			Order Date		Outstanding Invoices (\$)	0,00
City	Atlanta		Quote No.		Total (\$)	59.837,20
State · · · · · · · · · · · · · · ·	GA		Vendor Order No.		Overdue Amounts (\$) as of 0	18.193,10
ZIP Code	31772		Vandar Shipmant Na		Invoiced Prepayment Amoun	0,00
Country/Rogion	115	~			Payments (\$)	194.408,51
Country/Region			Alternate Vendor Addres	~	Refunds (\$)	0,00
Contact No.	CT000017		Responsibility Center	\sim	Last Payment Date	12.02.2020
Contact	Toby Rhode		Assigned User ID	\sim		
					Buy-from Vendor History	



- 1) Click on Posting
- 2) Click on Post

amics	365 Business Central				Sandbox	Q D (ŷ ?
\leftarrow	purchase order work d 106006 · Wide	ate: 06.04.2020 World Importers	 + i 		√S	AVED 📑 ;	a ^{rc}
	Process Release Postin	ng Order Request Approval Prin rint 🔯 Preview Posting 🔯 Post a	t/Send Navigate More options			(〕 +⊐
	Finalize the docum Vendor No.	ent or journal by posting the amounts and quant	tites to the related accounts in your company books. (F9) Due Date		Vendor Statistics		Τ.
	Vendor Name	Wide World Importers	Vendor Invoice No. · · · · · *		Vendor No.	40000	
	BUY-FROM		Purchaser Code · · · · · · · AH	~	Balance (\$)	18.193,10	
	Address · · · · · · · · · · · · · · · · · ·	51 Radcroft Road	No. of Archived Versions	0	Outstanding Orders (\$)	41.644,10	
	Address 2				Amt. Rcd. Not Invd. (\$)	0,00	
	City	Atlanta	06.04.2020		Outstanding Invoices (\$)	0,00	Ι.
	State	GA	Quote No.		Overdue Amounts (\$) as of 0	18 193 10	
	State	GA	Vendor Order No.		Invoiced Prepayment Amoun	0.00	
	ZIP Code	31772	Vendor Shipment No.		Payments (\$)	194.408,51	
	Country/Region · · · · · ·	US 🗸	Alternate Vendor Addres	\sim	Refunds (\$)	0,00	
	Contact No.	CT000017	Responsibility Center · · · · · ·	~	Last Payment Date	12.02.2020	
	Contact · · · · · · · · · · · · · · · · · · ·	Toby Rhode	Assigned User ID	~			
	Document Date	06.04.2020	Status		Buy-from Vendor History		
	Posting Date	06.04.2020	Status Open		Vendor No.	40000	



- 1) Click on Receive
- 2) Click on Ok

106006 · Wide	World Importers		,√ SA\	′ED ⊡',*
Process Release Postir	ng Order Request Approval	Print/Send Navigate More options		
General		Show I	ess ① Details ① Attachments (0)	
Vendor No.	40000	✓ Due Date	Vendor Statistics	
Vendor Name	Wide World Importers		Vendor No.	40000
BUY-FROM		Receive	Balance (\$)	18.193,10
Address	51 Radcroft Road		Outstanding Orders (\$)	41.644,10
		Receive and Invoice	Amt. Rcd. Not Invd. (\$)	0,00
Address 2			Outstanding Invoices (\$)	0,00
City · · · · · · · · · · · · · · · · · · ·	Atlanta	OK Carrie	Total (\$)	59.837,20
State · · · · · · · · · · · · · · · · · · ·	GA	UK Cancel	Overdue Amounts (\$) as of 0	18.193,10
ZIP Code	31772		Invoiced Prepayment Amoun	0,00
		Vendor Shipment No.	Payments (\$)	194.408,51
Country/Region · · · · · ·	US	Alternate Vendor Addres	 Refunds (\$) 	0,00
Contact No.	CT000017	··· Responsibility Center	Zast Payment Date	12.02.2020
Contact	Toby Rhode	Assigned User ID		
		isigned over it.	Dung frame Vander History	



- 1) Check if posting was successfully
- 2) Quantity Received is $200 \rightarrow$ This posting was successfully

106006 · W	ide Wor	ld Im	porters							
Process Release	Posting O	rder Re	equest Approval	Print/Send	Navigate Mo	ore options				()
Contact · · · · · · Toby Rhode · · ·				··· Vend	Vendor Shipment No.				(i) Details 🛯 🕅 Attachments (0)
Document Date	06.04.2	2020	Į					- 1	Vendor Statistics	
Lines Manage Marganities Ed								Vendor No.	40000	
Lines Wallage	wore option	115							Balance (\$)	18.193,10
Type		Quantity	Oty to Invoice	Quantity	Oty to Assign	Oty Assigned	Promised Pacoint Data	Planned Possint Dr	Outstanding Orders (\$)	11.584,10
-> Itom	;	200	200	Invoiced	Quy. to Assign	Qty. Assigned	Necelpt Date	06.04.205	Amt. Rcd. Not Invd. (\$)	30.060,00
/ item		200	200		0	-		00.04.202	Outstanding Invoices (\$)	0,00
		200							Total (\$)	59.837,20
									Overdue Amounts (\$) as of 0	18.193,10
									Invoiced Prepayment Amoun	0,00
Subtotal Excl. Tax (USD)		30.060,	00 Tota	Excl. Tax (USD)			30.060,00	Payments (\$)	194.408,51
In. Discount Amount			0	00 T-+-	T (UCD)			0.00	Refunds (\$)	0,00
.nv. Discount Amount (0 0,00				Iotariax (USD)			0,00	Last Payment Date	12.02.2020	
Invoice Discount %				0 Tota	Incl. Tax (USD)			30.060,00		
									Buy-from Vendor History	