

### Time-saving Workflows and Automations

Efficiency is likely why you are using Business Central in the first place... and efficiency is the key to saving time. But did you know you can save EVEN more time with your daily activities? Business Central has a very powerful workflow engine PLUS the ability to extend into Microsoft Power Automate, and better yet, they are fairly easy to get started with! We cannot wait to show how to use workflows in Business Central, exemplify how to build efficiencies and save time, as well as leverage automations OUTSIDE of Business Central with Power Automate. Give us 50 minutes of your time, and we will give you back MUCH MORE!





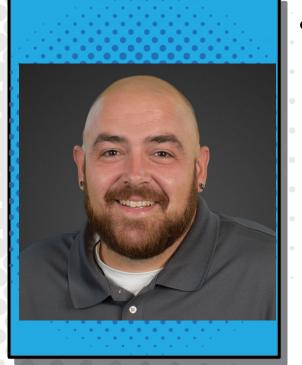
### Time-saving Workflows and Automations

- ShawnDorward
- Workflows



- Andy Ricchiuto
- Automations







## **Shawn Dorward**

- Vice President, sa.global
- Microsoft MVP 5 Years
- Community Contributor
  - Fun Fact Shawn has presented at every Dynamics Con event since it started
- Blog Site LifeHacks365.com
- LinkedIn: https://www.linkedin.com/in/shawnmd/
- Twitter: https://twitter.com/LifeHacks365com
- Started using GP 24 years ago, NAV about 6 years ago













# **Andy Ricchiuto**

- Power Platform Team Lead, Innovia Consulting
- Power Platform 2 years
- NAV/BC 3 months

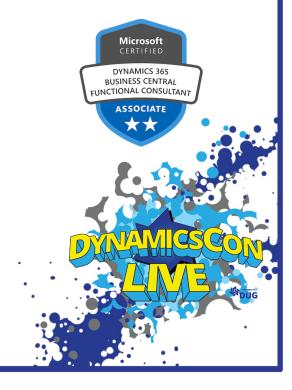


- Norhtwest Indiana
- Father of 2 1 boy, 1 girl
- Dog dad of 2

#### **Connect with me!**

LinkedIn - <u>linkedin.com/in/andy-ricchiuto/</u>







## Today's Agenda

- · What is it?
- What types of workflows exist?
- Why use workflow?
- How do they work?
- Examples of BC Workflows
- Power Automate Teaser
- Closing Thoughts





#### What is workflow?

- sequence of tasks that are triggered by an action, a condition or a rule.
- usually implemented to integrate business logic to an organization, such as the separation of duties, unifying processes, or to increase trust and responsibilities.

The workflows are designed to create requests for approval
 of a new value while keeping the old value in case the
 request isn't approved. The new value won't be
 implemented until the last request is approved.

**Own** {backup}

## Why use workflow

- Build Efficiencies
- Milestones in processes
- Increase accuracy
- Reduce duplicates







## What Types of Workflow Exist?

- Linear, or Sequential
- Parallel, or Multipath
- Electronic
- Manual

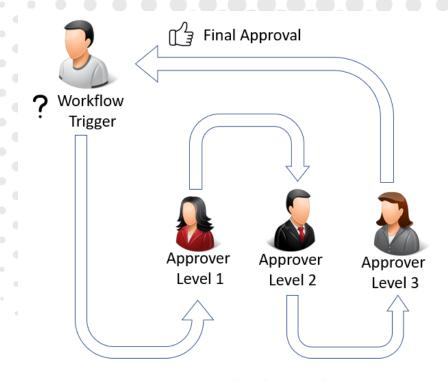




## Types of Workflow approvals

- New master data like G/L Accounts, customers, vendors, or items
- Changes to fields in existing records containing sensible information, such as Vendor Bank Account No. or Customer Credit Limit
- Changes to fields in existing records containing business critical information
- Purchase documents
- Sales documents
- Incoming documents
- Finance journals prior to posting

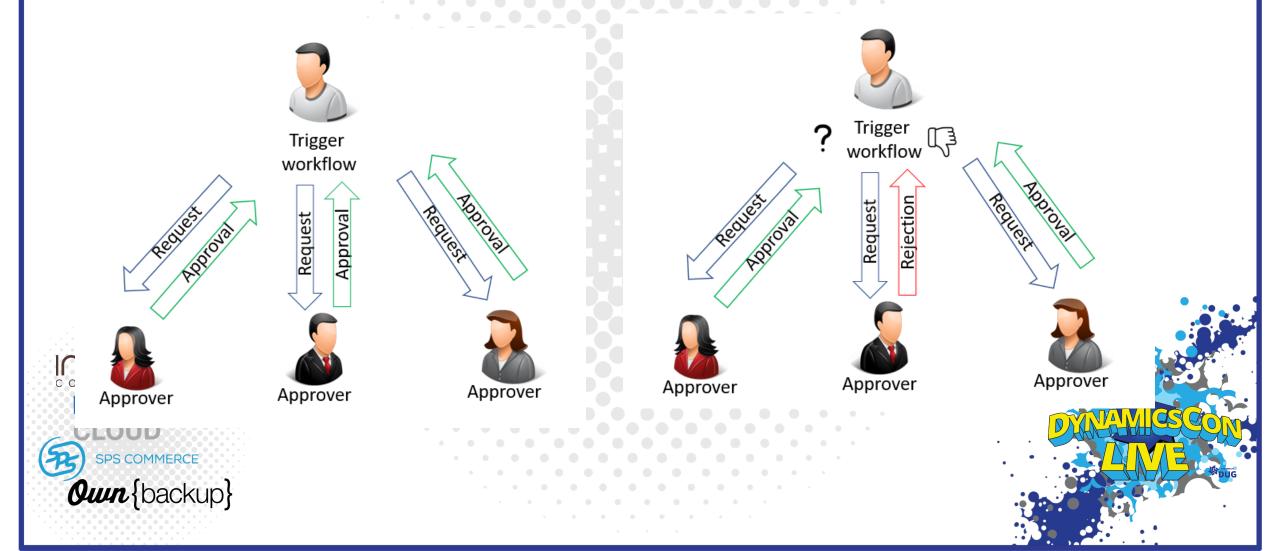
### Sequential Approval







## Parallel Approval



#### ① Note

It is not possible to create a workflow with multiple approvers and expect the whole workflow to be approved after the first request has been approved. All requests must be approved for the workflow to be approved.





#### Workflows

- The following table describes a sequence of tasks, with links to the articles that describe them.
- See related training at <u>Microsoft</u> <u>Learn</u>

See
Enable Workflows
Use Approval Workflows
Restrict and Allow Usage of a Record
View Archived Workflow Step Instances
Delete Workflows

#### **Advanced Settings**







Extensions enhance the capabilities of Business Central.

#### Extensions

Set up and manage use of external services.

Service Connections

Overview and manage individual settings and behaviors.

#### Manual Setup

Manage automation of business processes.

Workflows

Done





## Workflow Types





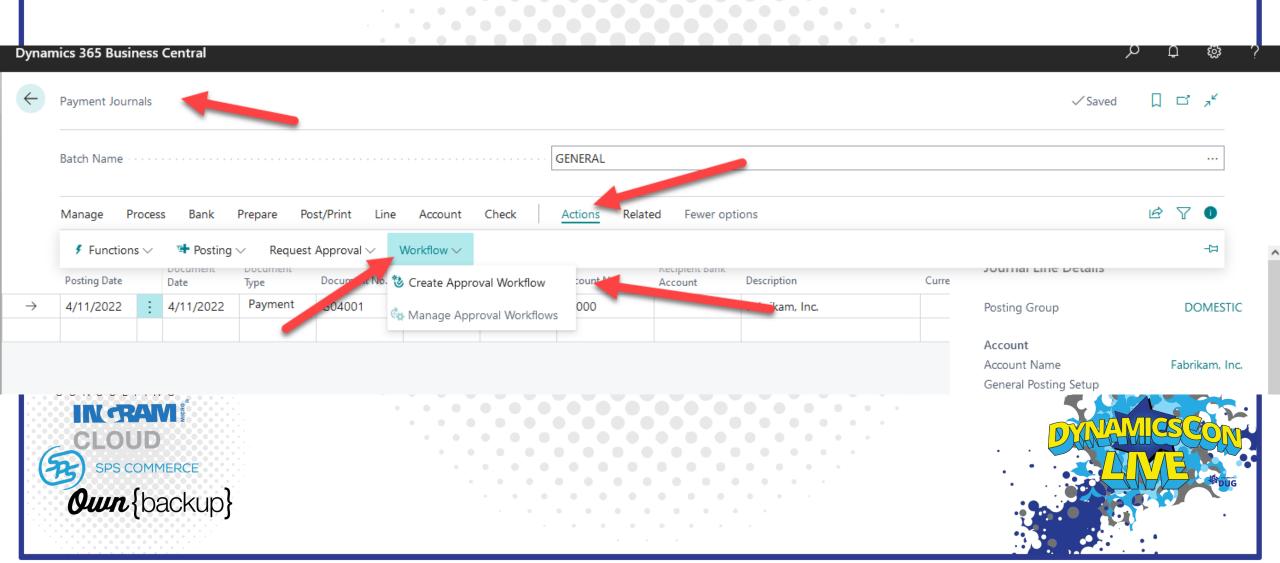
∨ <u>Administration</u>	
Overdue Approval Requests Workflow	
✓ Finance	✓ Sales and Marketing
General Journal Batch Approval Workflow	Customer Credit Limit Change Approval Workflow
General Journal Line Approval Workflow	Customer Approval Workflow
∨ Integration	Item Approval Workflow
Incoming Document Workflow	Item Unit Price Change Approval Workflow
Incoming Document Approval Workflow	∨ Sales Documents
Incoming Document Exchange Workflow	• • •
Incoming Document to General Journal Line OCR Workflow	Blanket Sales Order Approval Workflow
Incoming Document OCR Workflow	Sales Credit Memo Approval Workflow
∨ Purchases and Payables	Sales Invoice Approval Workflow
Vendor Approval Workflow	Sales Invoice Credit Limit Approval Workflow
∨ Purchase Documents	Sales Order Approval Workflow
Blanket Purchase Order Approval Workflow	Sales Order Credit Limit Approval Workflow
Purchase Credit Memo Approval Workflow	Sales Quote Approval Workflow
Purchase Invoice Approval Workflow	Sales Return Order Approval Workflow
Purchase Invoice Workflow	
Purchase Order Approval Workflow	
Purchase Quote Approval Workflow	
Purchase Return Order Approval Workflow	

#### How to create a workflow in BC?





### From a Page

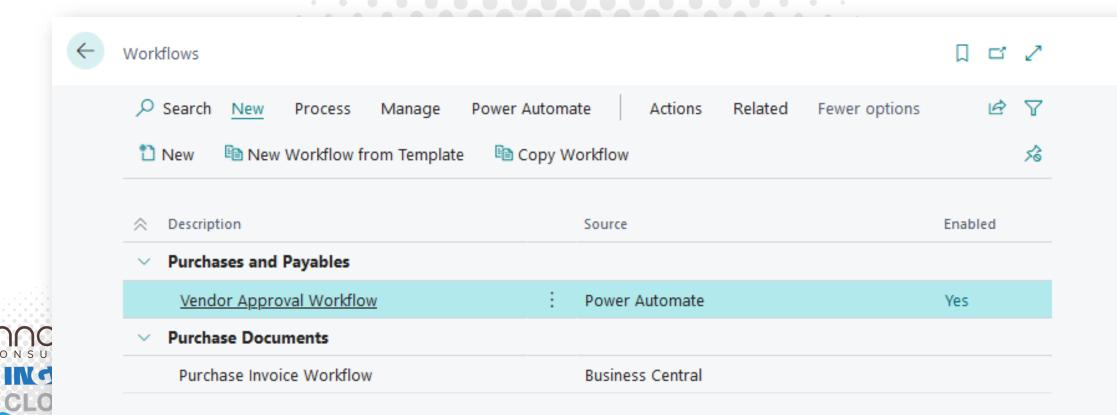


### Assisted Setup

Account Check Actions Related	Fewer options
Approval Workflow Setup	∠ ×
<b>©</b>	
Choose who is authorized to approve or reject the	e payment journal lines.
Choose if the approval workflow applies to all jour	rnal batches or to the current journa
batch only.	
Approval workflow applies to · · · · Current Ba	
Approval workflow applies to · · · · Current Ba	



## From A Template



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## Some key things to remember

- Workflow User Approval Setup
- Start Simple
- Work your way up
- Test, try to break the rules, test again
- Document and Export





#### Let's Check this out

- From a Template
  - Build Customer Change
- From a Window
  - Build Payment Journal Approval
- From assisted Setup
  - Build Item Approval





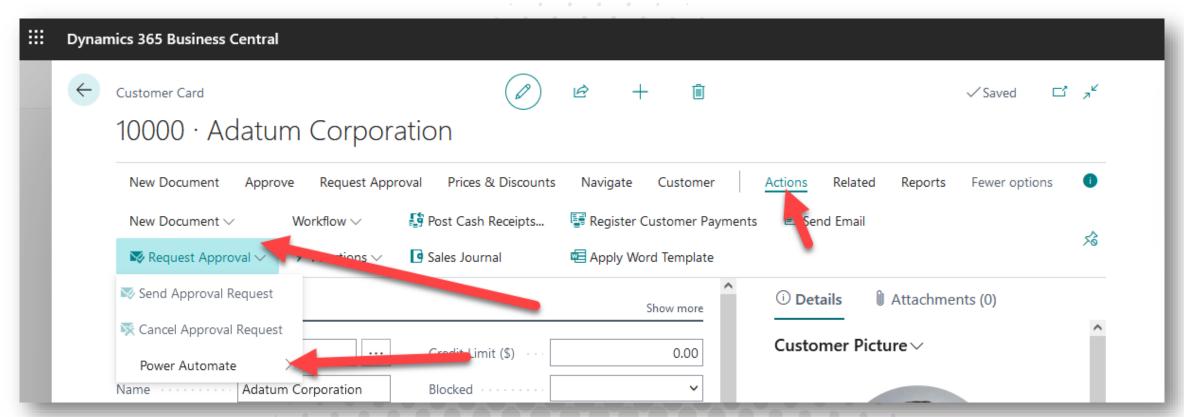
То	See
Set up workflow users and user groups.	Set Up Workflow Users
Set up workflow users who take part in approval workflows.	Set Up Approval Users
Specify how workflow users are notified of workflow steps, including approval requests.	Setting Up Workflow Notifications
Specify if users are notified by email or note and how often notifications are sent.	Specify When and How to Receive Notifications
Customize the content of the email notification by modifying Report 1320, Notification Email.	Create and Modify Custom Report Layouts
Set up an SMTP server to enable email communication in and out of Business Central	Set up Email
Specify the different steps of a workflow by connecting workflow events with workflow responses.	Create Workflows
Use workflow templates to create new workflows.	Create Workflows from Workflow Templates
Share workflows with other Business Central databases.	Export and Import Workflows
Learn how to set up a workflow for approving sales documents by following an end-to-end procedure.	Walkthrough: Setting Up and Using a Purchase Approval Workflow

## Beyond BC Functionality

Power Automate to go bigger

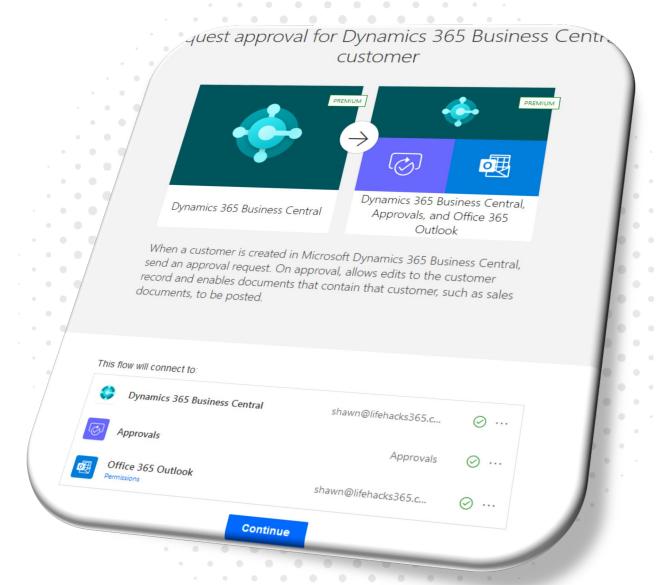












IN CRAME

CLOUD

SPS COMMERCE

**Own** {backup}



## **Triggers**

#### Triggers - A trigger is an event that starts a flow



When a record is changed (V3)



When a record is created (V3)



When a record is deleted (V3)



When a record is modified (V3)



When a customer approval is requeste...



When a customer approval is requeste...



When a general journal batch approv...



When a general journal batch approv...



When a general journal line approval...



When a general journal line approval...



When a purchase document approval i...



When a purchase document approval i...



When a record is changed (V2)



When a record is created (V2)



When a record is deleted (V2)



When a record is modified (V2)



When a sales document approval i...



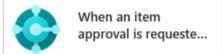
When a sales document approval i...

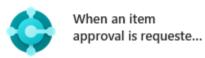


When a vendor approval is requeste...

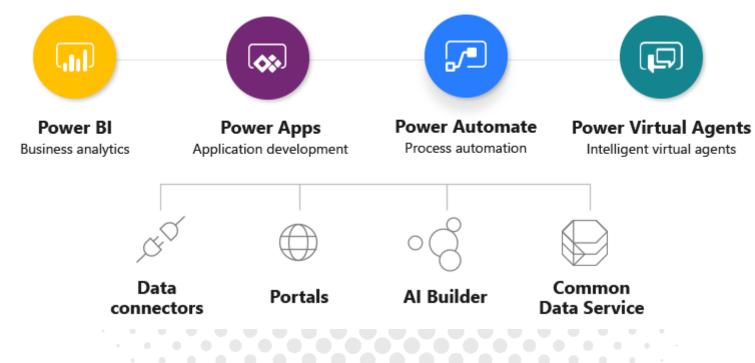


When a vendor approval is requeste...





#### Power Platform







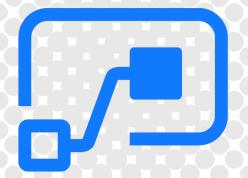
#### Update data in a database

#### Save attachments from E-Mails

#### / Receive Notifications

Record responses on forms

Send approvals



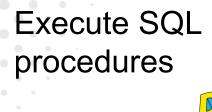
Sync data



Retrieve data from SQL Server

Complete custom actions

**Set Reminders** 







#### Financials

- Customer Portal
- Invoice Automation





## Inventory Management

Inventory Power App





## Manufacturing

Shop Floor Application





#### Workflow LifeHacks

- Use Multiple Conditions to drive workflow
  - Created by this person, the vendor is in this state
  - Or.. Location code and zip code
  - Tax type





#### Time-saving Workflows and Automations

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#### Gino Pack

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