Aptean Advanced Workflow

Simplify and Optimize Business Processes

Reduce Complexity, Enable Simplicity

Built on Microsoft Dynamics 365 Business Central, Aptean Advanced Workflow enables companies with complex business processes to focus on their actual business. Stop wasting valuable time and money working around inefficient or outdated processes—use Aptean Advanced Workflow to increase productivity, reduce costs and react faster using real-time information.

Do More With Less

It's no secret: more and more businesses are becoming increasingly lean, meaning you have to find a way to become more efficient if you want to remain competitive. Fortunately, Aptean Advanced Workflow was designed to help you do just that.

By prioritizing, optimizing and automating tasks across every business process you have, Aptean Advanced Workflow gives you unprecedented control and insight into your company. This frees up time to work on more pressing obligations, while also leading to fewer errors from manual workflow management and the costs that come from those errors. The end result is a completely optimized process chain with flexible configuration parameters and the ability to easily scale for growth.

Aptean Advanced Workflow is also extremely easy to setup; most companies are ready to start in just a few hours. Plus, customizing or changing workflows requires no additional programming and can be done quickly.
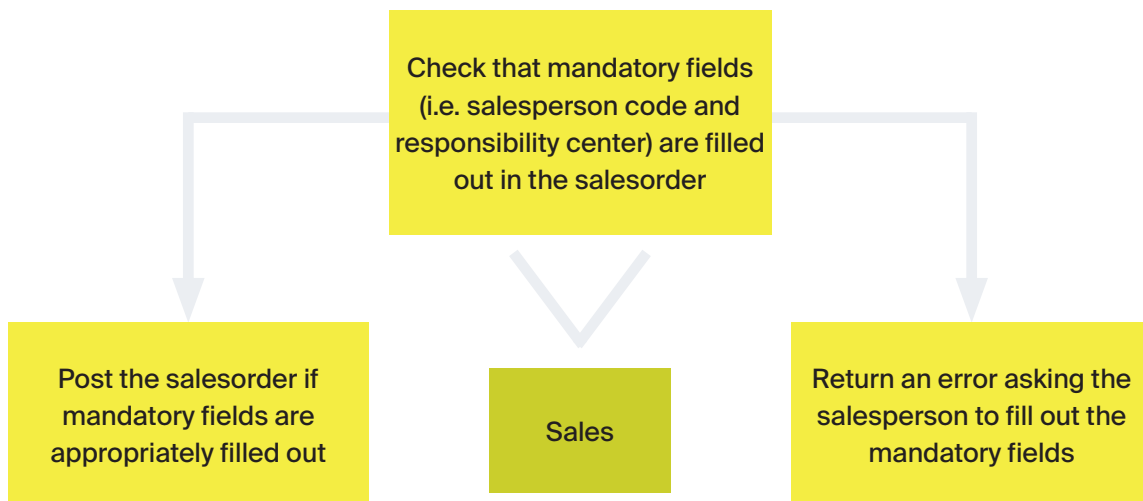
Key Features

› **Enhance Your Productivity -** Manage, simplify, prioritize and automate tasks for your employees, entire departments or management.

› **Reduce Costs -** By automating processes, you can reduce your operating costs by eliminating unnecessary errors and removing overly-manual operations.

› **Better Decision-Making -** Real-time information on all relevant tasks and processes provide you with the context you need when making key decisions, quickly.

› **Future Flexibility -** Easily customize your existing processes to meet changing business needs.

› **Easy to Setup & Use -** Using our straighforward setup wizard, you have the ability to set up new workflows in minutes and prepare them for the system just as fast.

› **No Programming or Coding -** Aptean Advanced Workflow can be integrated into your existing Microsoft Dynamics 365 Business Central solution without any modifications or additional programming.

Workflow Examples

There's so much you can do with Aptean Advanced Workflow, but we wanted to give you some real-life examples that other businesses have already implemented. Here are 5 different ways of using Aptean Advanced Workflow with an explanation of the situation you may be facing, what problem the workflow solves and what the workflow looks like. Remember—these are just examples. Aptean Advanced Workflow can be used to improve almost any business process you have.

Example #1: Ensure a sales order is complete before the order is posted

- **The Situation:** Your salespeople sometimes do not fill out all the necessary details from a customer or transaction before posting a sales order.

- **The Solution:** Designate specific fields as "mandatory fields" that must be filled out before posting a sales order. If the salesperson tries to post without a mandatory field filled out, an error message will trigger.

- **What Does It Look Like?**

Check that mandatory fields (i.e. salesperson code and responsibility center) are filled out in the salesorder

Post the salesorder if mandatory fields are appropriately filled out

Sales

Return an error asking the salesperson to fill out the mandatory fields

Example #2: Move responsibilities for an action from one team to another

- **The Situation:** A new vendor needs to be added to your system. At least 2 different teams or functional groups have actions they will need to complete in order to add a vendor to the system.
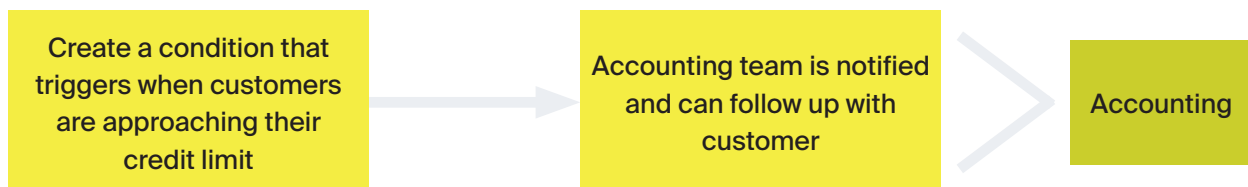
- **The Solution:** Create a workflow that requires certain actions are completed by specific teams.

- **What Does It Look Like?**

Create a template that needs to be filled out for adding a new vendor to the system	→	Create the vendor folder and fill out the necessary details	>	Purchasing
		↓		
		Attach vendor contract	>	Purchasing
		↓		
		Review vendor setup	>	Finance
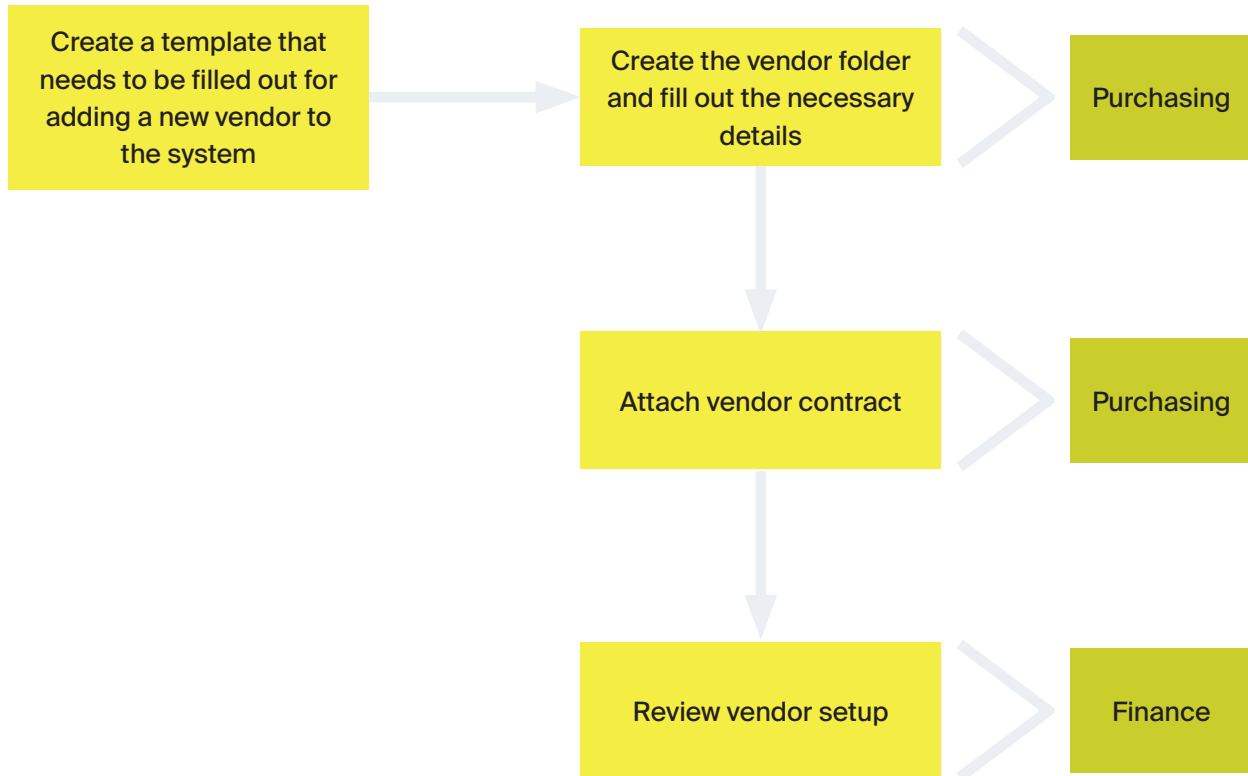
Example #3: Alert your accounting team when a customer is close to their credit limit

- **The Situation:** Your accounting team needs to be alerted when a customer has used 90% or more of their credit limit.

- **The Solution:** When a customer is at or above 90% of their credit limit usage, a notification is sent out to your accounting team.

- **What Does It Look Like?**

Create a condition that triggers when customers are approaching their credit limit	→	Accounting team is notified and can follow up with customer	>	Accounting

Example #4: Add a new customer into your system and make sure all appropriate functional areas complete relevant actions in order

- **The Situation:** You have a new customer that needs to be added into your system, but there are multiple departments that must complete actions in a specific order before it can be correctly added to the system.

- **The Solution:** Create an end-to-end system that requires input from specified groups and moves the process from one stage to the next once actions are completed.

- **What Does It Look Like?**

```
┌──────────────────────────┐      ┌──────────┐
│ Check that mandatory     │  >   │  Sales   │
│ fields are filled out    │      │          │
│ by customer              │      │          │
└──────────────────────────┘      └──────────┘
          │
          ▼
┌──────────────────────────┐      ┌──────────┐      ┌──────────────────────┐      ┌──────────┐
│ Attach credit            │  >   │  Sales   │      │ Review dimensions    │  >   │ Finance  │
│ application              │      │          │      │ and group setup      │      │          │
└──────────────────────────┘      └──────────┘      └──────────────────────┘      └──────────┘
          │
          ▼
┌──────────────────────────┐                        ┌──────────────────────┐      ┌──────────┐
│ Department Checks        │────────────────────────│ Credit and           │  >   │ Finance  │
│                          │                        │ background check     │      │          │
└──────────────────────────┘                        └──────────────────────┘      └──────────┘
          │
          ▼
┌──────────────────────────┐      ┌──────────┐      ┌──────────────────────┐      ┌──────────┐
│ Approve new customer     │  >   │  Sales   │      │ Setup shipping       │  >   │ Warehouse│
│                          │      │          │      │ fields               │      │          │
└──────────────────────────┘      └──────────┘      └──────────────────────┘      └──────────┘
          │
          ▼
┌──────────────────────────┐      ┌──────────┐
│ Send engagement letter   │  >   │  Sales   │
│                          │      │          │
└──────────────────────────┘      └──────────┘
```
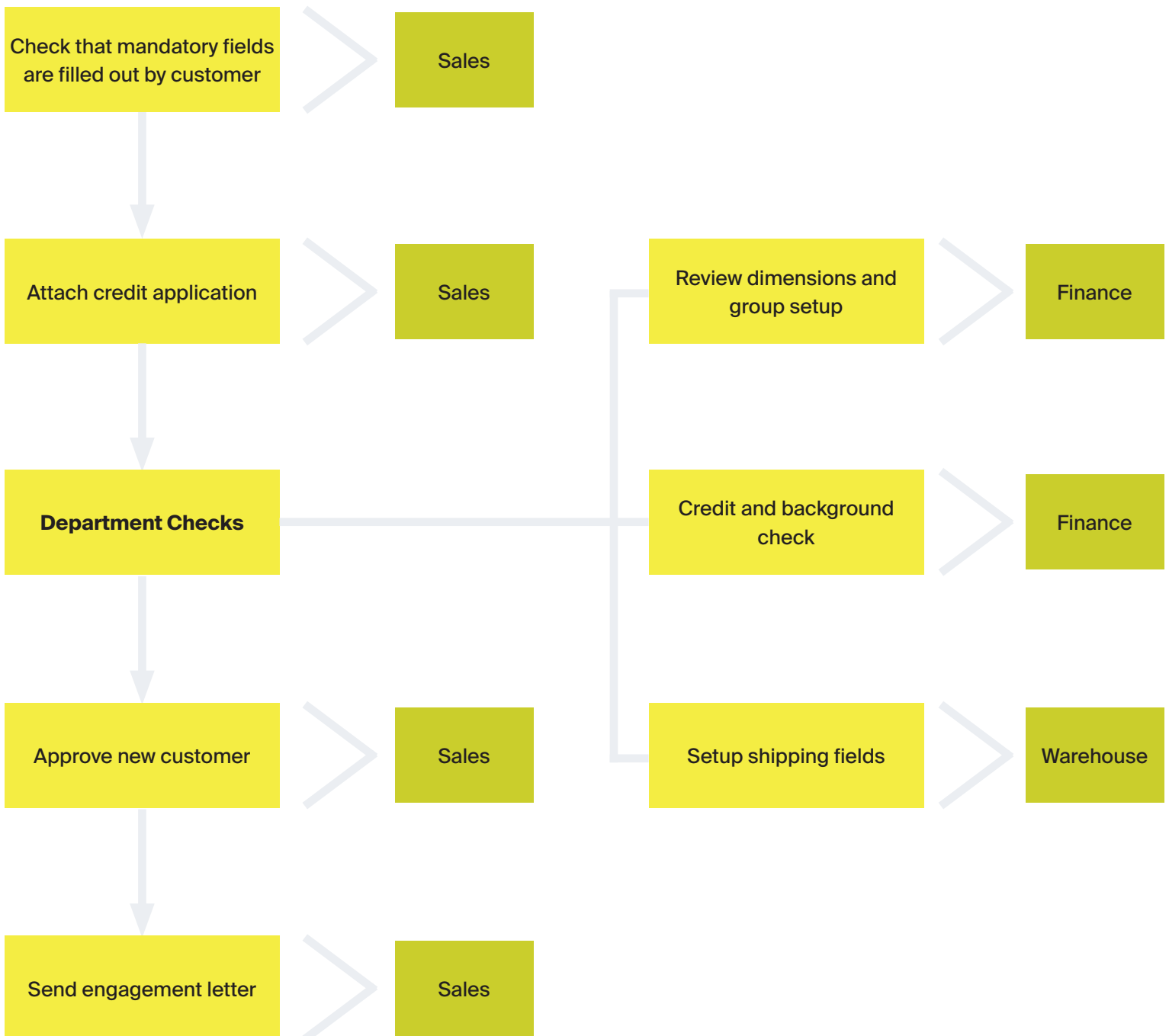
Scenario #5: Add a new employee into your system and have each department work in tandem to complete necessary actions

- **The Situation:** You have a new employee that needs to be added into your system. Multiple departments need to be able to independently complete tasks relating to the setup of this new employee.

- **The Solution:** Allow multiple departments to act independently of each other without gates (i.e. three separate processes can be completed at one time; each is not dependent on the other being completed).

- **What Does It Look Like?**
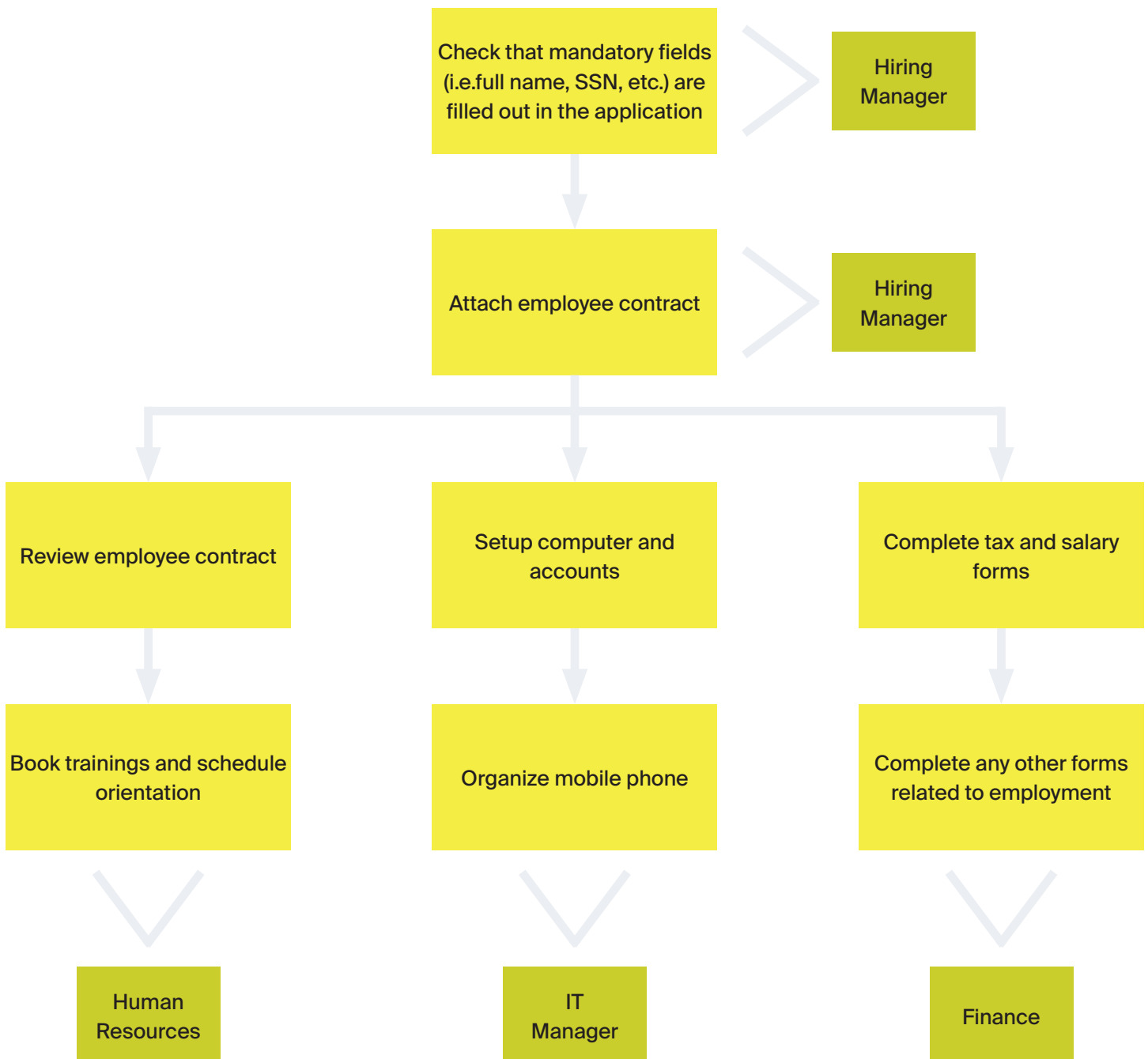
Are you Ready to **Learn More?**

Interested to see how Aptean can help you better manage your business?

Contact Us at **info@aptean.com** or visit **www.aptean.com**.

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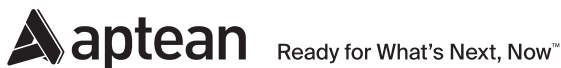
About Aptean

Aptean is one of the world's leading providers of industry-specific software. Our enterprise resource planning and supply chain solutions are uniquely designed to meet the needs of specialized manufacturers and distributors, while our compliance solutions serve specific markets such as finance and life sciences. With both cloud and on-premise deployment options, Aptean's products, services and unmatched expertise help businesses of all sizes, across many industries, to scale and succeed.

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