



User Documentation AppSource

Aptean Advanced Workflow

April 2nd, 2020

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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).

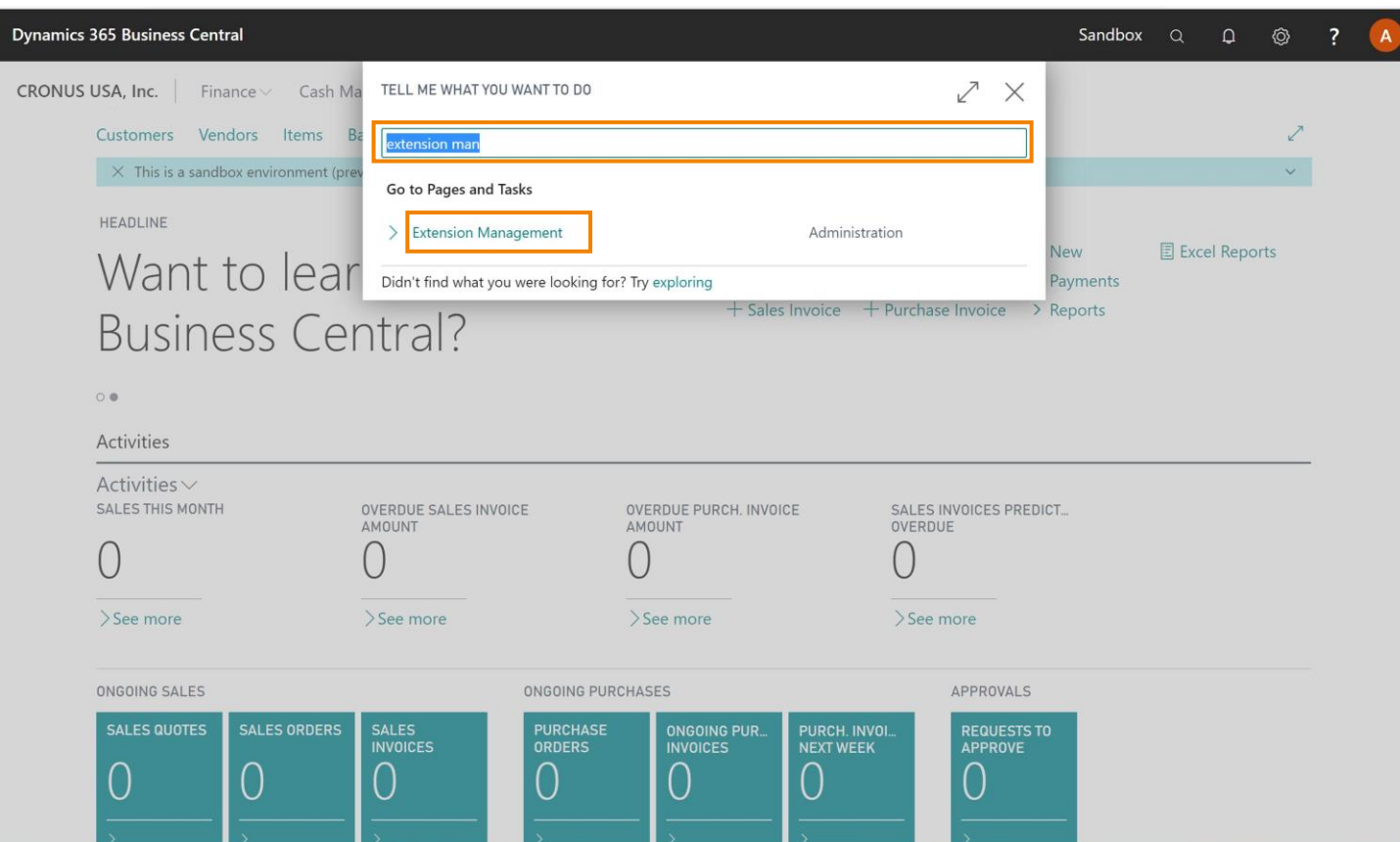
Set your Work Date to System Date.



Basic Setup

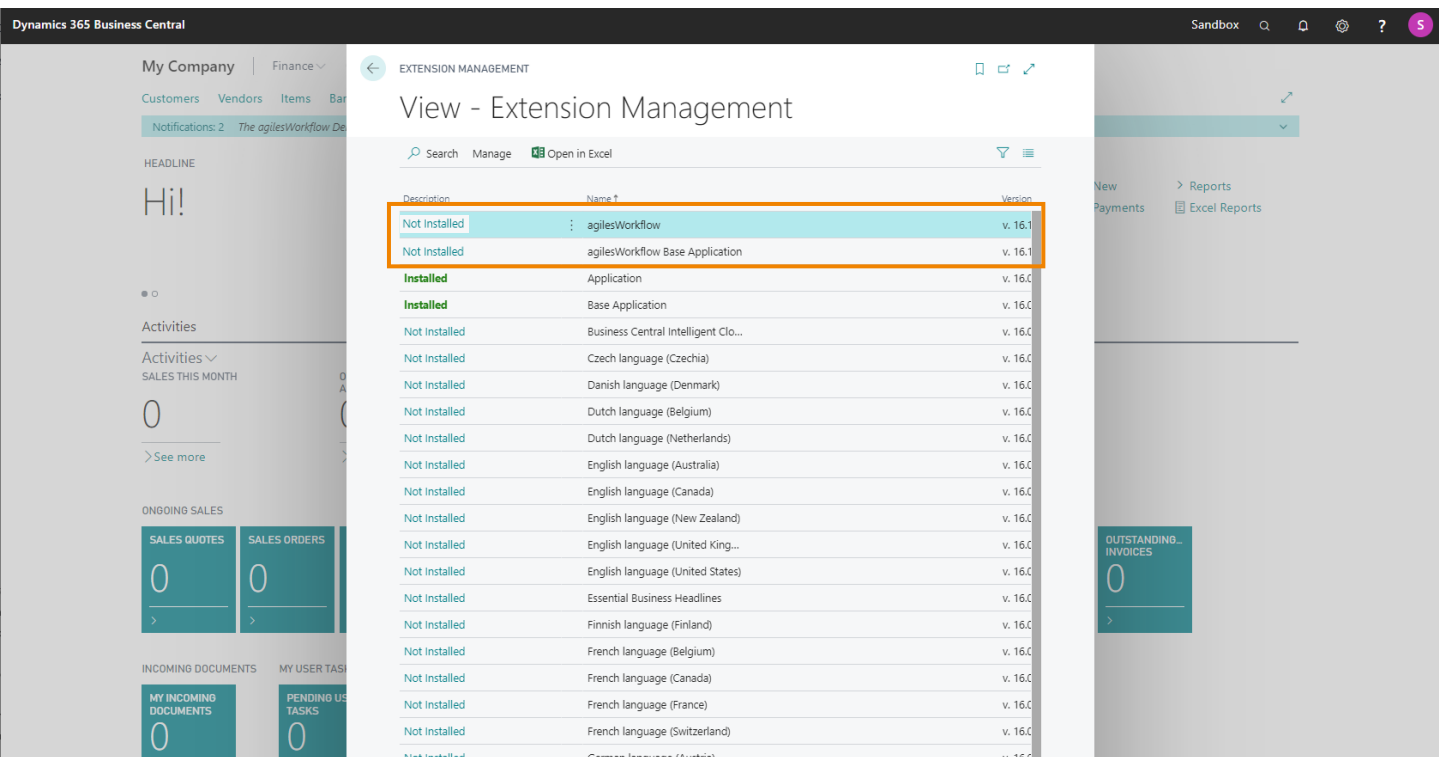
Basic Setup – Load Extension

1) Open **Extension Management**



Basic Setup – Load Extension

- 1) Extension Management List: Aptean Advanced Workflow and Aptean Advanced Workflow Base Application is not installed yet

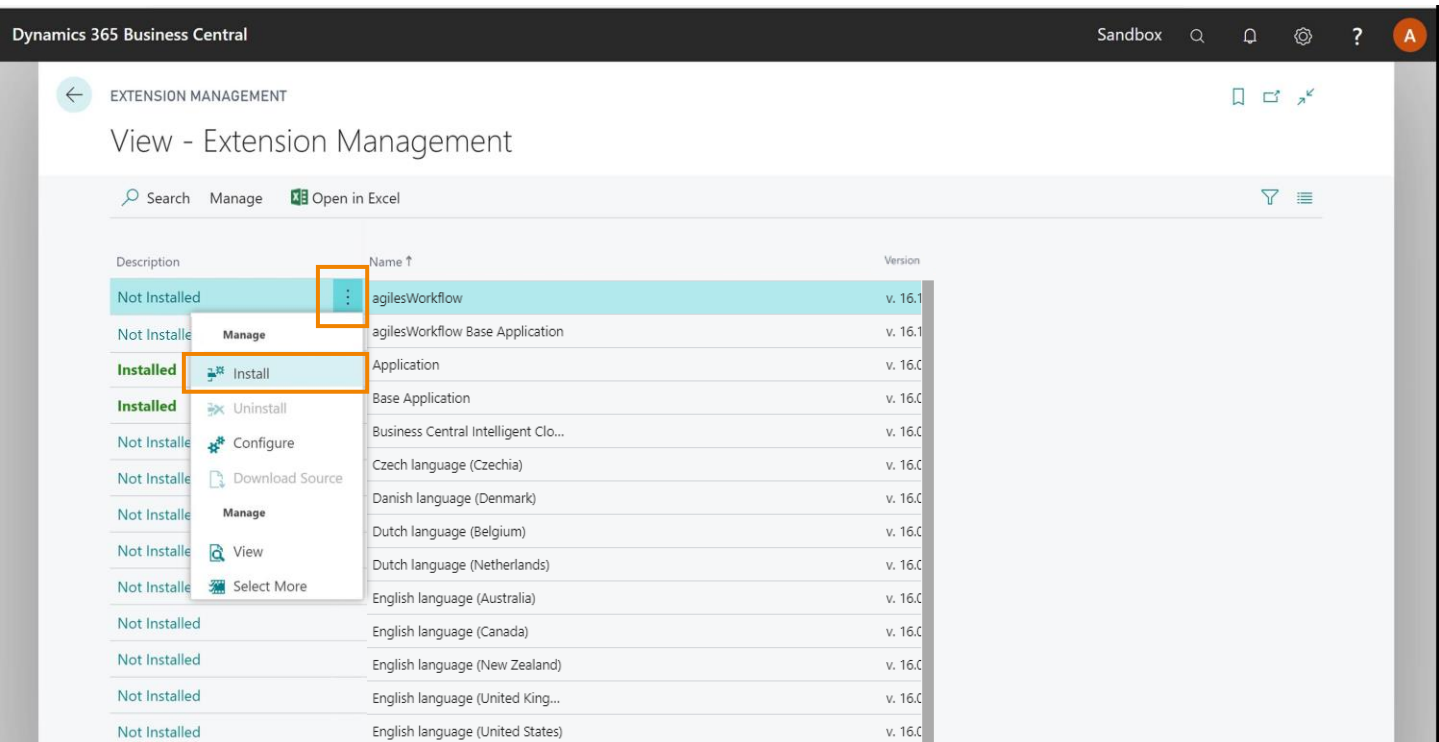


The screenshot displays the 'EXTENSION MANAGEMENT' interface in Dynamics 365 Business Central. The main window is titled 'View - Extension Management' and contains a table of installed and available extensions. The table has three columns: 'Description', 'Name #', and 'Version'. Two rows are highlighted with an orange border, indicating they are not installed:

Description	Name #	Version
Not installed	agilesWorkflow	v. 16.1
Not installed	agilesWorkflow Base Application	v. 16.1
Installed	Application	v. 16.0
Installed	Base Application	v. 16.0
Not installed	Business Central Intelligent Clo...	v. 16.0
Not installed	Czech language (Czechia)	v. 16.0
Not installed	Danish language (Denmark)	v. 16.0
Not installed	Dutch language (Belgium)	v. 16.0
Not installed	Dutch language (Netherlands)	v. 16.0
Not installed	English language (Australia)	v. 16.0
Not installed	English language (Canada)	v. 16.0
Not installed	English language (New Zealand)	v. 16.0
Not installed	English language (United King...	v. 16.0
Not installed	English language (United States)	v. 16.0
Not installed	Essential Business Headlines	v. 16.0
Not installed	Finnish language (Finland)	v. 16.0
Not installed	French language (Belgium)	v. 16.0
Not installed	French language (Canada)	v. 16.0
Not installed	French language (France)	v. 16.0
Not installed	French language (Switzerland)	v. 16.0
Not installed	German language (Austria)	v. 16.0

Basic Setup – Load Extension

- 1) Click on **Install**

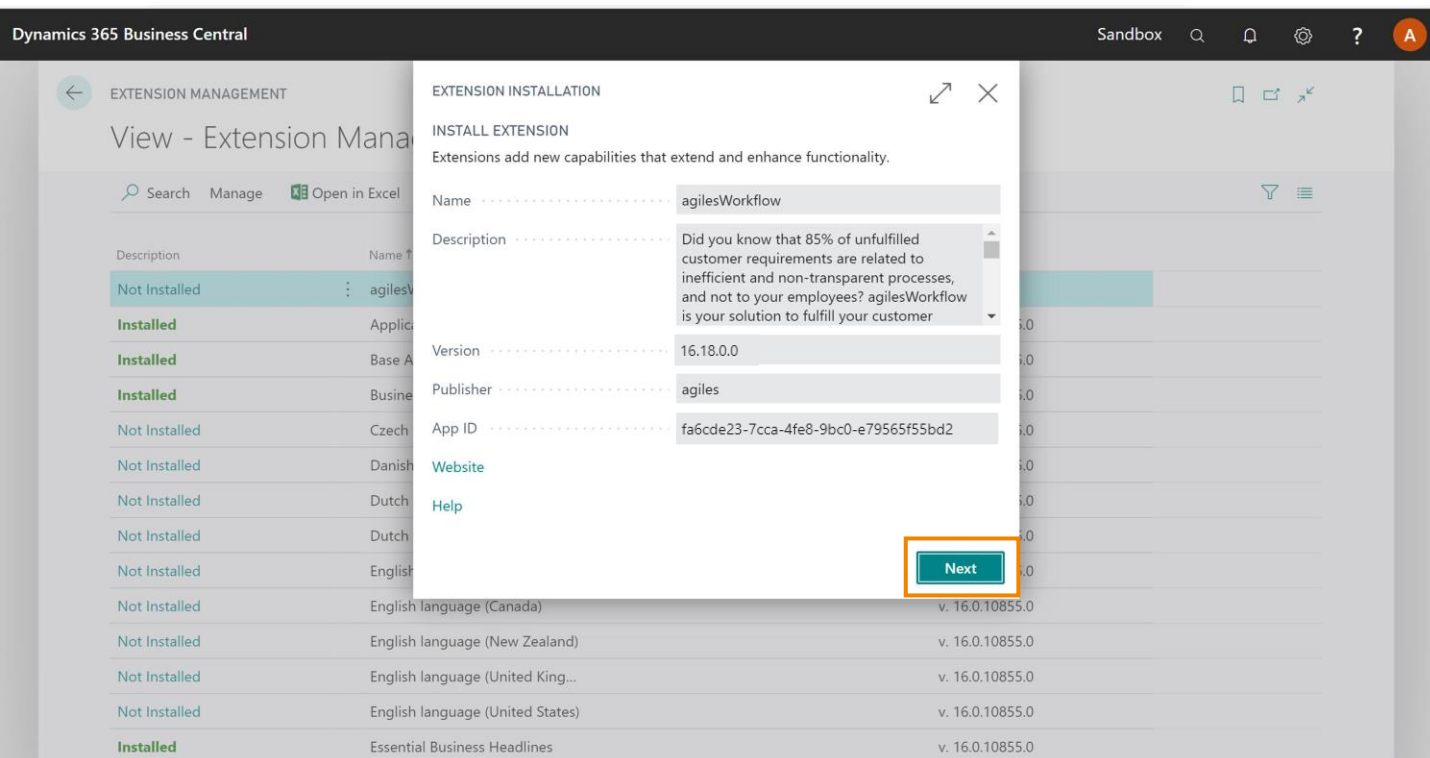


The screenshot shows the Dynamics 365 Business Central interface for Extension Management. The page title is "View - Extension Management". The interface includes a search bar, a "Manage" button, and an "Open in Excel" button. A table lists various extensions with columns for Description, Name, and Version. The extension "agilesWorkflow" is highlighted in light blue, and its context menu is open, showing options like "Install", "Uninstall", "Configure", "Download Source", "View", and "Select More". The "Install" option is highlighted with an orange box.

Description	Name ↑	Version
Not Installed	agilesWorkflow	v. 16.1
Not Installed	agilesWorkflow Base Application	v. 16.1
Installed	Application	v. 16.0
Installed	Base Application	v. 16.0
Not Installed	Business Central Intelligent Clo...	v. 16.0
Not Installed	Czech language (Czechia)	v. 16.0
Not Installed	Danish language (Denmark)	v. 16.0
Not Installed	Dutch language (Belgium)	v. 16.0
Not Installed	Dutch language (Netherlands)	v. 16.0
Not Installed	English language (Australia)	v. 16.0
Not Installed	English language (Canada)	v. 16.0
Not Installed	English language (New Zealand)	v. 16.0
Not Installed	English language (United King...	v. 16.0
Not Installed	English language (United States)	v. 16.0

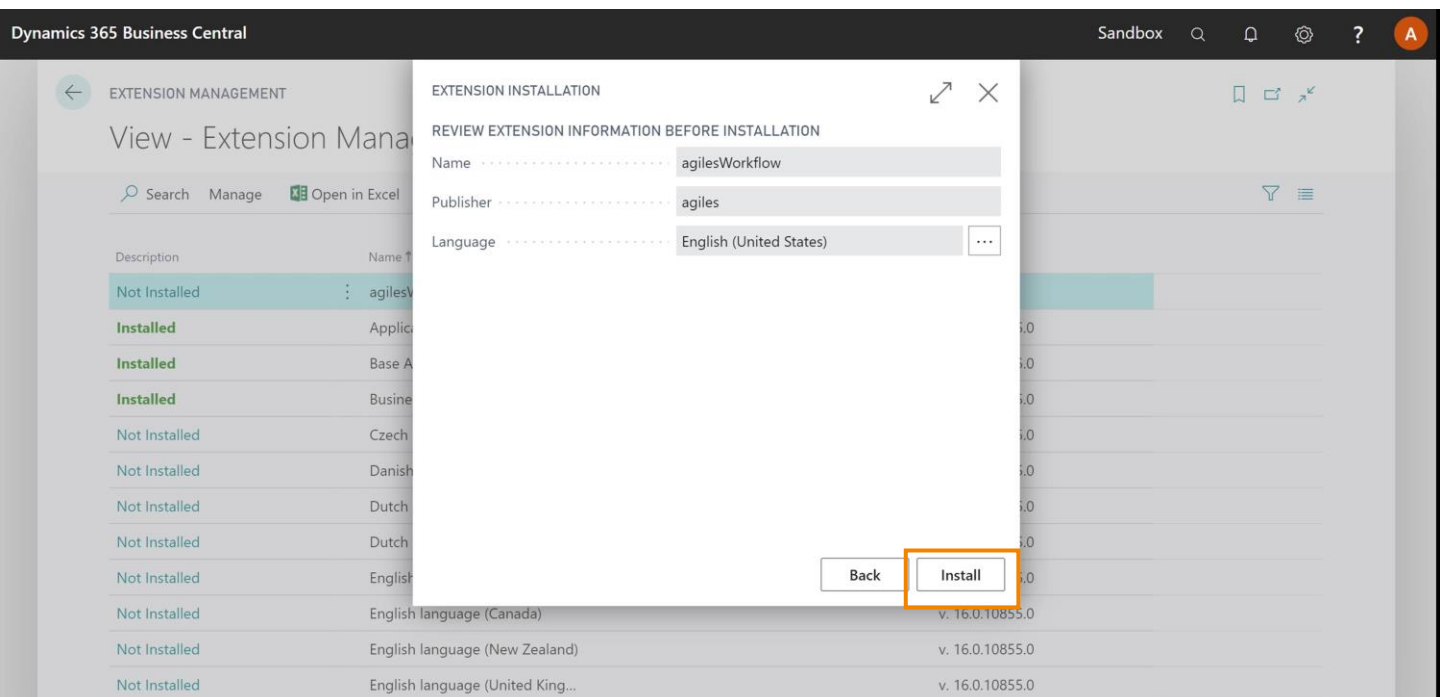
Basic Setup – Load Extension

- 1) Click on **Next**



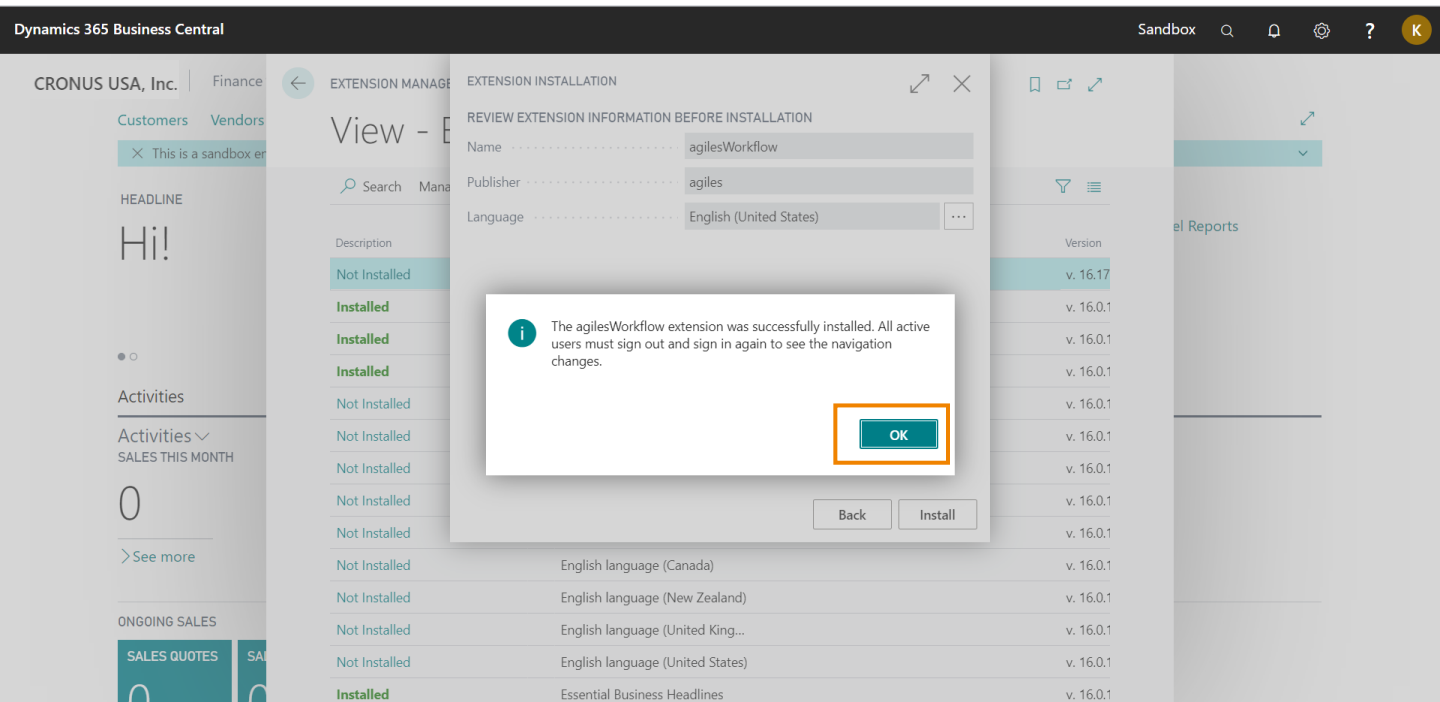
Basic Setup – Load Extension

- 1) Click on **Install**



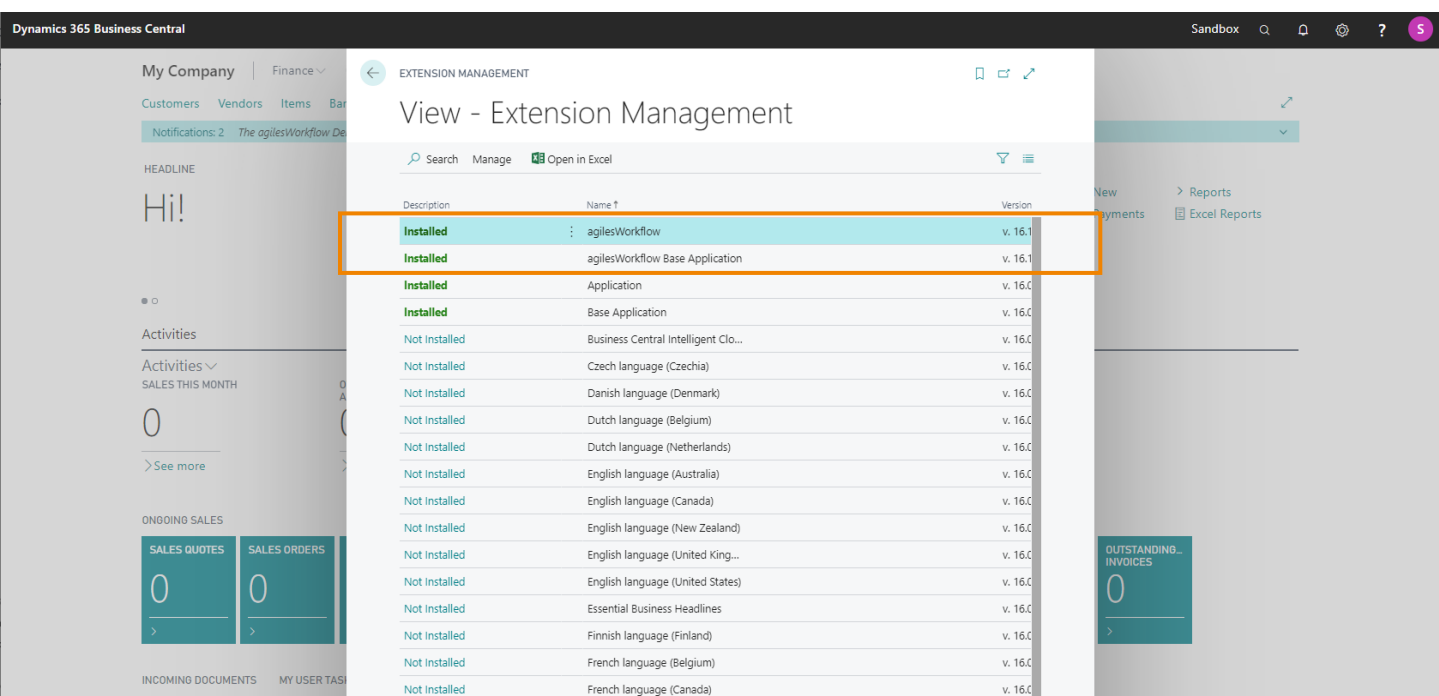
Basic Setup – Load Extension

- 1) Click on **Ok**



Basic Setup – Load Extension

- 1) Install the Aptean Advanced Workflow Base Application
- 2) Important: Two Aptean Apps must be installed (Aptean Advanced Workflow & Aptean Advanced Workflow 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.

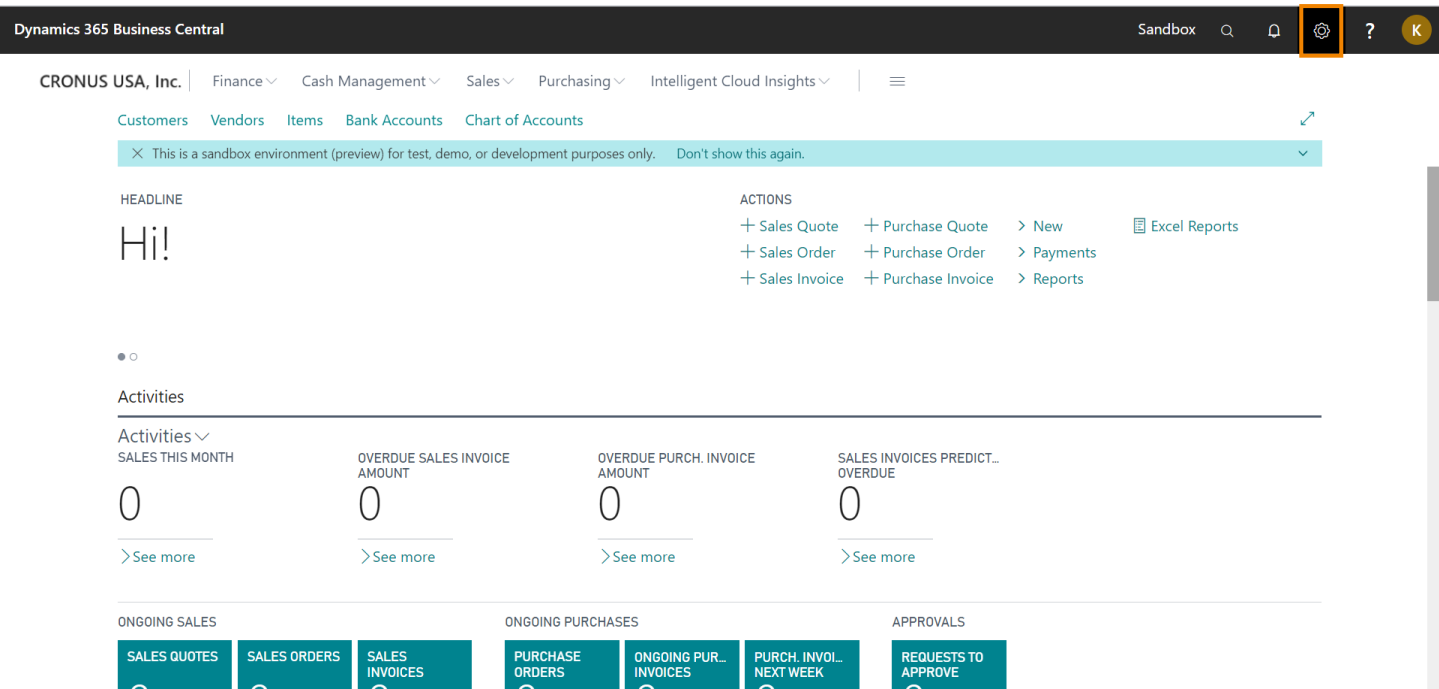


The screenshot shows the Dynamics 365 Business Central interface with the 'EXTENSION MANAGEMENT' window open. The window title is 'View - Extension Management'. It displays a table of installed and not installed extensions. Two rows are highlighted with an orange box, indicating they are installed:

Description	Name	Version
Installed	agilesWorkflow	v. 16.1
Installed	agilesWorkflow Base Application	v. 16.1
Installed	Application	v. 16.0
Installed	Base Application	v. 16.0
Not Installed	Business Central Intelligent Clo...	v. 16.0
Not Installed	Czech language (Czechia)	v. 16.0
Not Installed	Danish language (Denmark)	v. 16.0
Not Installed	Dutch language (Belgium)	v. 16.0
Not Installed	Dutch language (Netherlands)	v. 16.0
Not Installed	English language (Australia)	v. 16.0
Not Installed	English language (Canada)	v. 16.0
Not Installed	English language (New Zealand)	v. 16.0
Not Installed	English language (United King...	v. 16.0
Not Installed	English language (United States)	v. 16.0
Not Installed	Essential Business Headlines	v. 16.0
Not Installed	Finnish language (Finland)	v. 16.0
Not Installed	French language (Belgium)	v. 16.0
Not Installed	French language (Canada)	v. 16.0

Basic Setup – Change Role Center

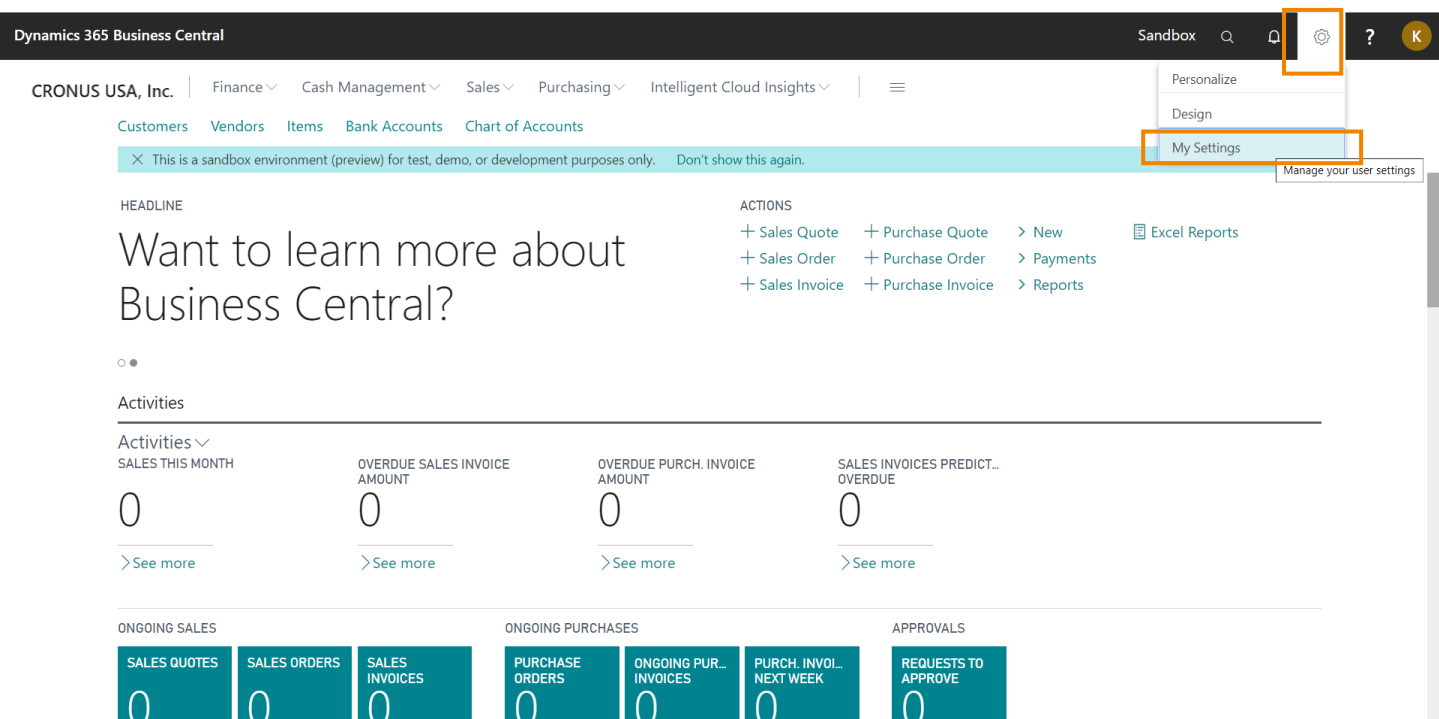
- 1) Click on **Settings**



The screenshot shows the Dynamics 365 Business Central user interface. At the top, the navigation bar includes the text "Dynamics 365 Business Central" on the left and "Sandbox" on the right. In the center of the navigation bar, there are icons for search, notifications, and settings. The settings icon, which is a gear, is highlighted with a yellow box. To the right of the settings icon are icons for help and user profile. Below the navigation bar, the main content area displays the company name "CRONUS USA, Inc." and a list of navigation options: Finance, Cash Management, Sales, Purchasing, and Intelligent Cloud Insights. A secondary row of navigation options includes Customers, Vendors, Items, Bank Accounts, and Chart of Accounts. A light blue notification banner states: "This is a sandbox environment (preview) for test, demo, or development purposes only. Don't show this again." Below the banner, the "HEADLINE" section shows a large "Hi!" greeting. To the right, the "ACTIONS" section lists various tasks: + Sales Quote, + Purchase Quote, + Sales Order, + Purchase Order, + Sales Invoice, + Purchase Invoice, > New, > Payments, > Reports, and Excel Reports. The "Activities" section is partially visible, showing four summary cards for "SALES THIS MONTH", "OVERDUE SALES INVOICE AMOUNT", "OVERDUE PURCH. INVOICE AMOUNT", and "SALES INVOICES PREDICT... OVERDUE", each with a zero value and a "See more" link. At the bottom, there are three main categories: "ONGOING SALES" (with sub-items SALES QUOTES, SALES ORDERS, SALES INVOICES), "ONGOING PURCHASES" (with sub-items PURCHASE ORDERS, ONGOING PUR... INVOICES, PURCH. INVOI... NEXT WEEK), and "APPROVALS" (with sub-item REQUESTS TO APPROVE).

Basic Setup – Change Role Center

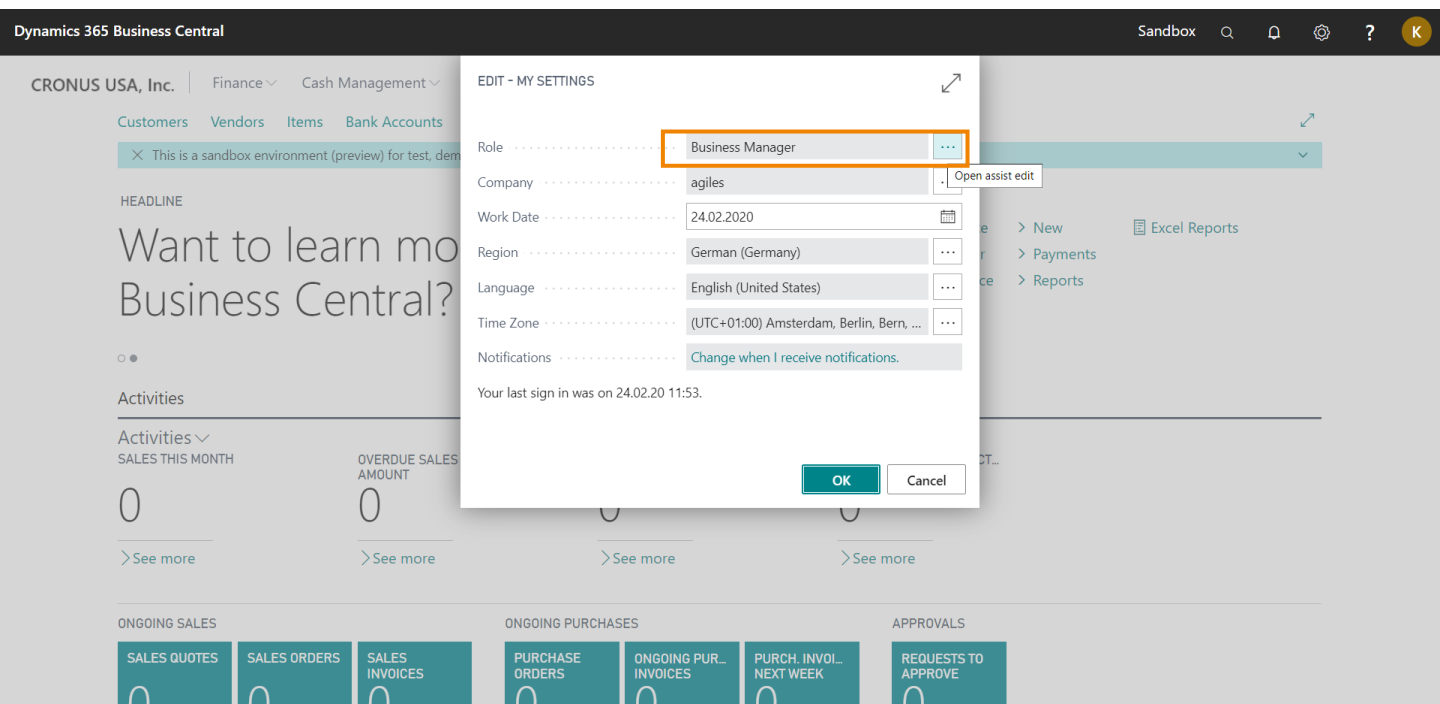
- 1) Click on **Settings**
- 2) Click on **My Settings**



The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The top navigation bar includes 'Sandbox', search, and user profile icons. A settings gear icon is highlighted with an orange box. A dropdown menu is open, showing 'Personalize', 'Design', and 'My Settings', with 'My Settings' also highlighted by an orange box. Below the navigation, there are tabs for 'Customers', 'Vendors', 'Items', 'Bank Accounts', and 'Chart of Accounts'. A notification bar states: 'This is a sandbox environment (preview) for test, demo, or development purposes only. Don't show this again.' The main content area features a headline: 'Want to learn more about Business Central?' and a list of actions: '+ Sales Quote', '+ Sales Order', '+ Sales Invoice', '+ Purchase Quote', '+ Purchase Order', '+ Purchase Invoice', '> New', '> Payments', '> Reports', and 'Excel Reports'. Below this is an 'Activities' section with four cards: 'SALES THIS MONTH' (0), 'OVERDUE SALES INVOICE AMOUNT' (0), 'OVERDUE PURCH. INVOICE AMOUNT' (0), and 'SALES INVOICES PREDICT... OVERDUE' (0). At the bottom, there are three sections: 'ONGOING SALES' (SALES QUOTES: 0, SALES ORDERS: 0, SALES INVOICES: 0), 'ONGOING PURCHASES' (PURCHASE ORDERS: 0, ONGOING PUR... INVOICES: 0, PURCH. INVOI... NEXT WEEK: 0), and 'APPROVALS' (REQUESTS TO APPROVE: 0).

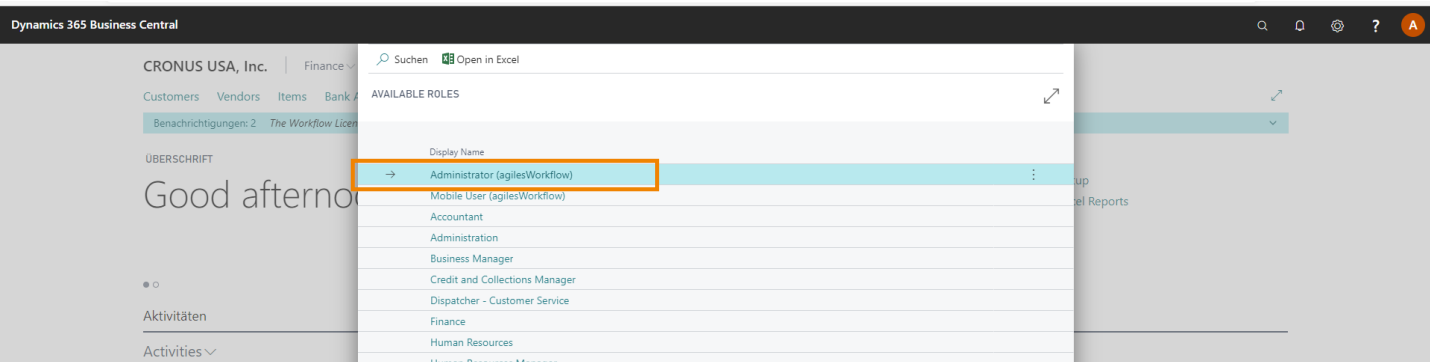
Basic Setup – Change Role Center

- 1) Use look up value



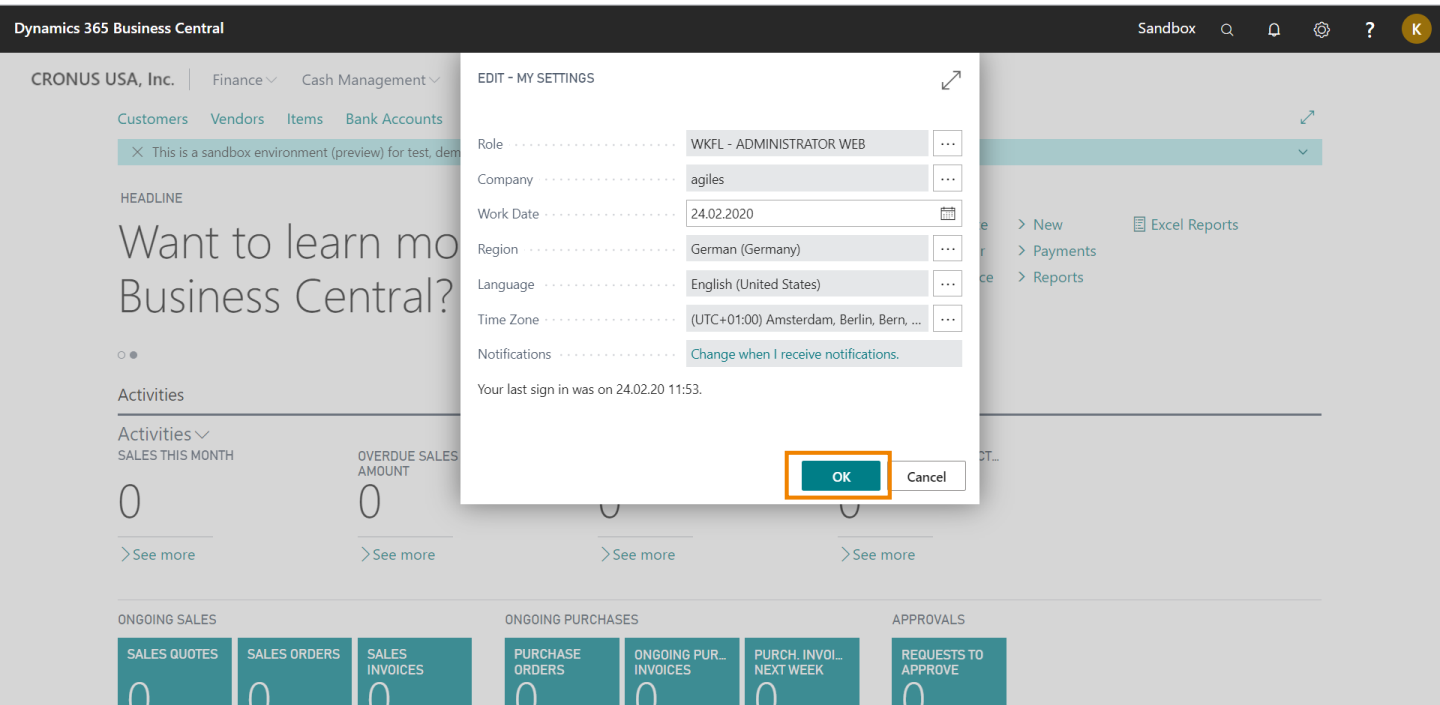
Basic Setup – Change Role Center

- 1) Select **ADMINISTRATOR (Aptean Advanced Workflow)**



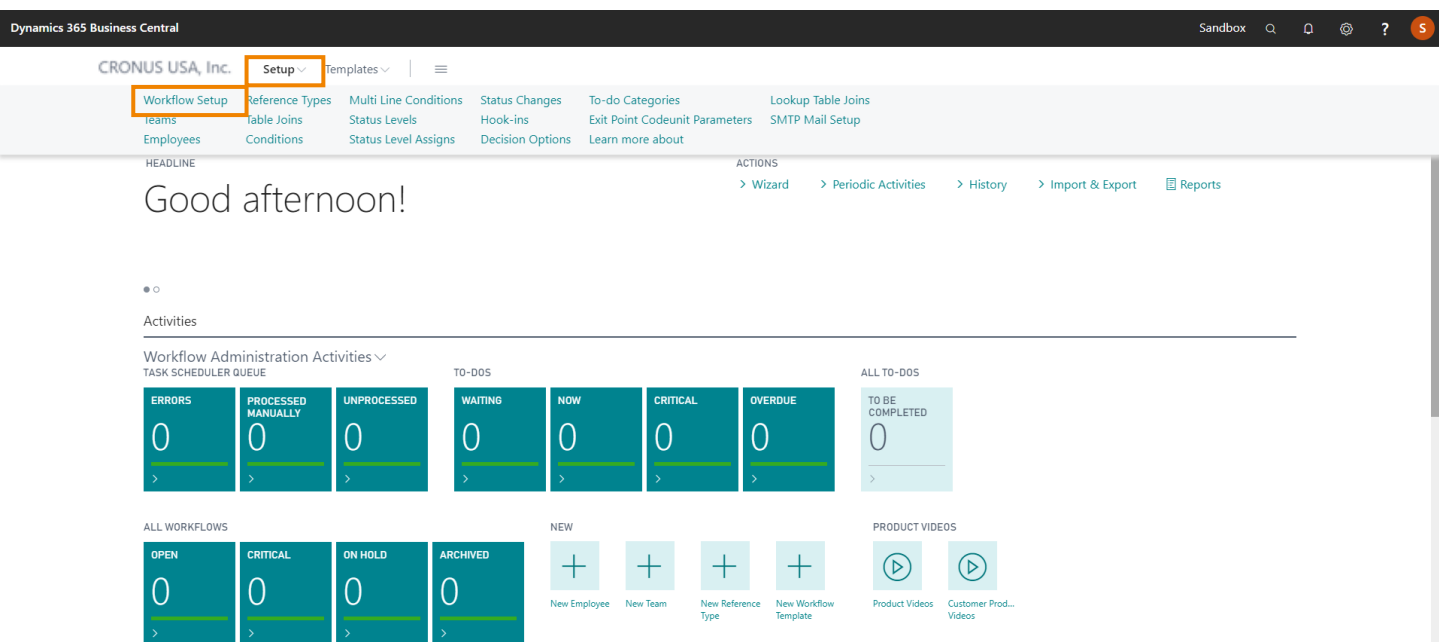
Basic Setup – Change Role Center

- 1) Click on **Ok**



Basic Setup

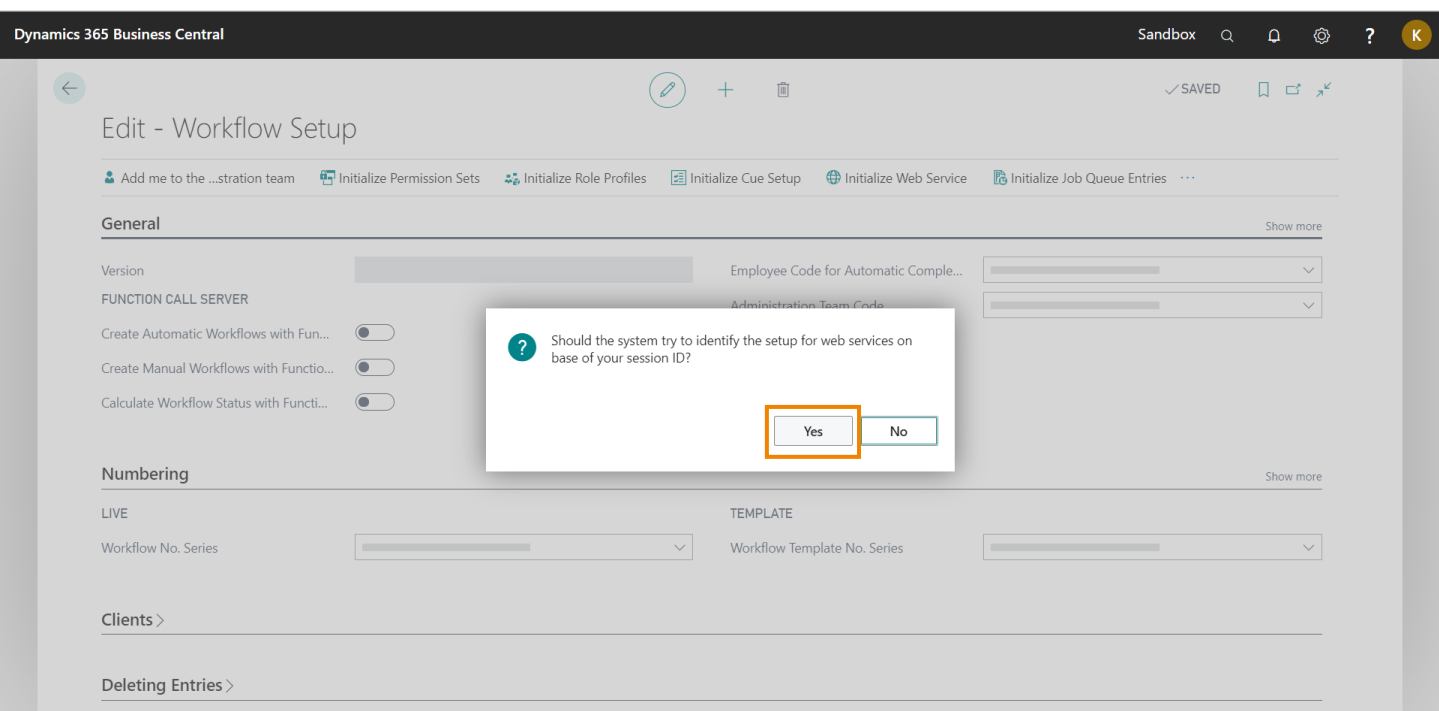
- 1) You are at the Role Center
- 2) Click on **Setup**
- 3) Click on **Workflow Setup**



The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The top navigation bar includes 'Setup' (highlighted with an orange box) and 'Templates'. Below this, a secondary menu lists various setup options, with 'Workflow Setup' (highlighted with an orange box) being the first item. The main content area shows a 'Good afternoon!' headline and a 'Workflow Administration Activities' section. This section contains several cards for task scheduler queues (Errors, Processed Manually, Unprocessed, Waiting, Now, Critical, Overdue, To Be Completed) and workflow status (Open, Critical, On Hold, Archived). It also features 'NEW' buttons for creating new entities (Employee, Team, Reference Type, Workflow Template) and 'PRODUCT VIDEOS' for training content.

Basic Setup

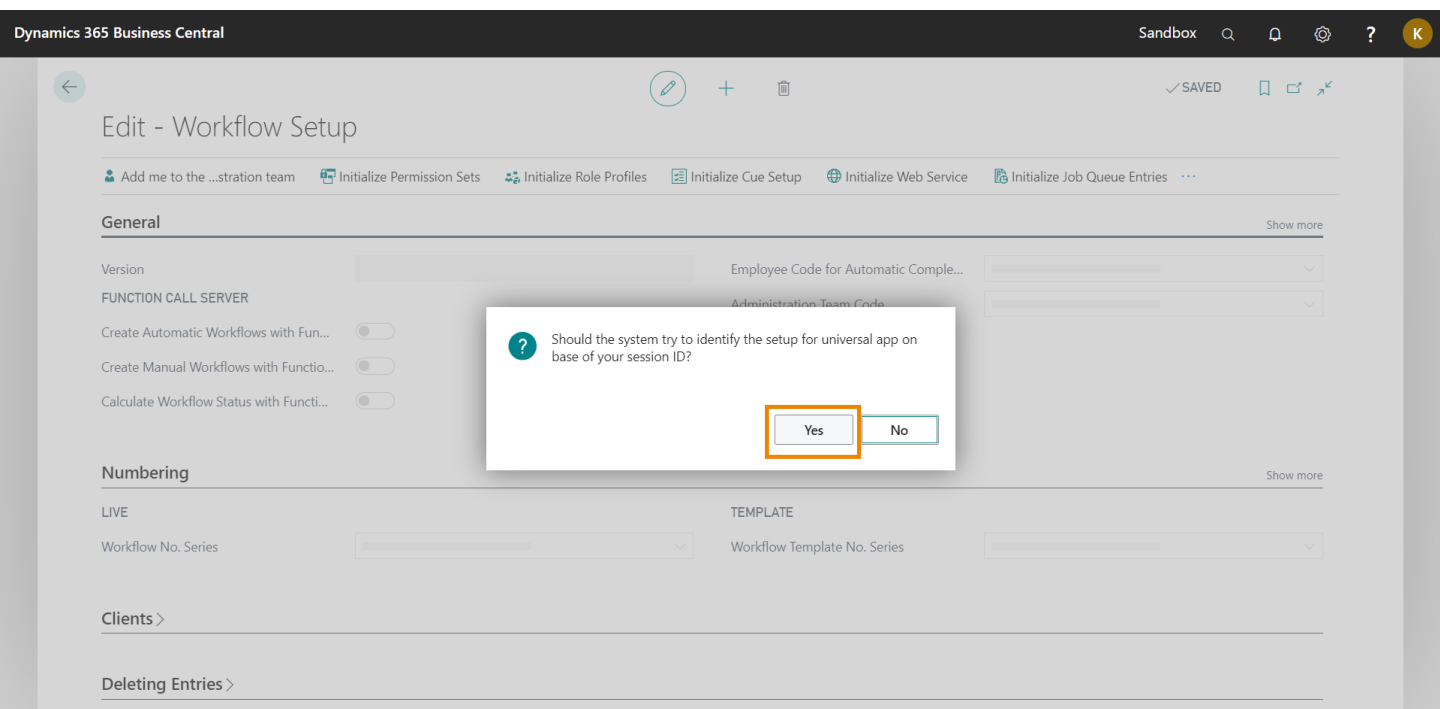
- 1) Click **Yes**



The screenshot shows the Dynamics 365 Business Central interface. At the top, the page title is "Edit - Workflow Setup". Below the title, there are several navigation links: "Add me to the ...stration team", "Initialize Permission Sets", "Initialize Role Profiles", "Initialize Cue Setup", "Initialize Web Service", and "Initialize Job Queue Entries". The main content area is divided into sections: "General", "Numbering", "Clients", and "Deleting Entries". The "General" section includes fields for "Version", "Employee Code for Automatic Comple...", "Administration Team Code", and three toggle switches for "Create Automatic Workflows with Fun...", "Create Manual Workflows with Functio...", and "Calculate Workflow Status with Functi...". A modal dialog box is displayed in the center, asking "Should the system try to identify the setup for web services on base of your session ID?". The dialog has two buttons: "Yes" and "No". The "Yes" button is highlighted with an orange border.

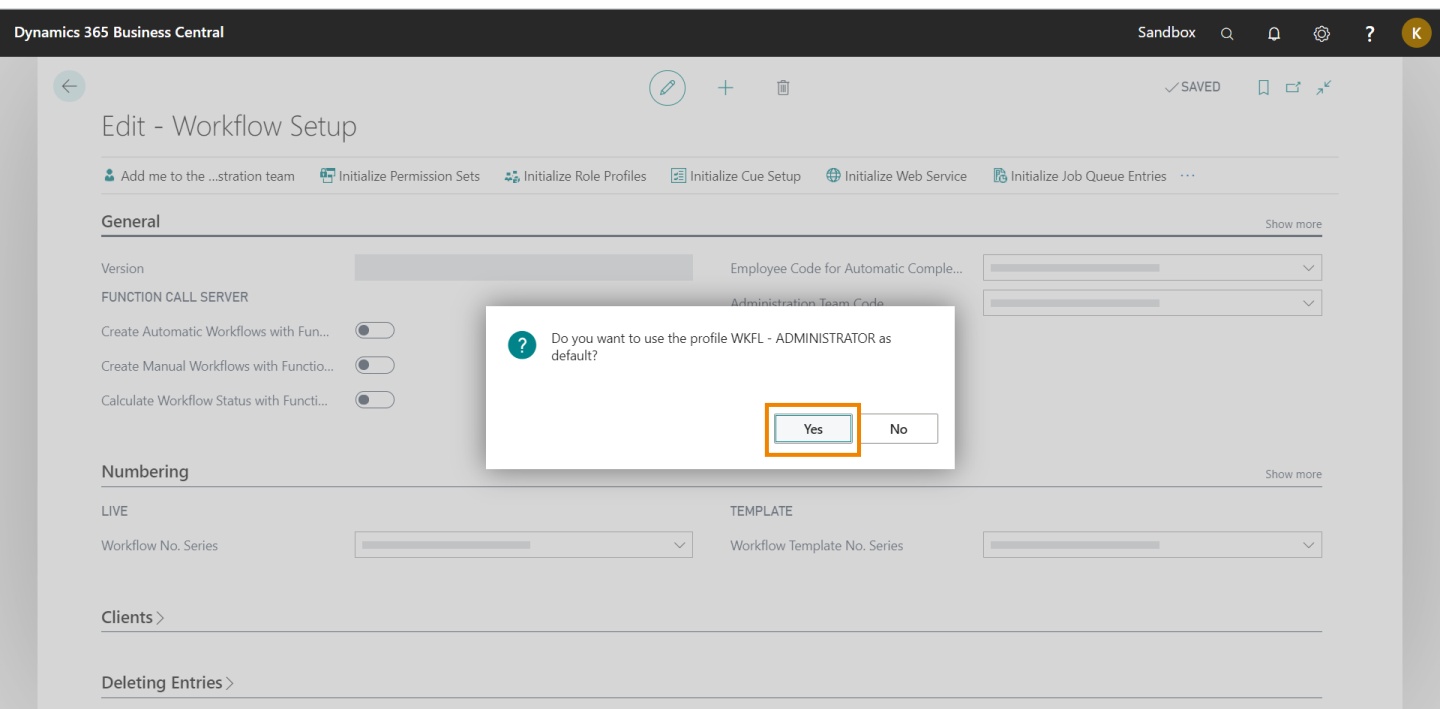
Basic Setup

- 1) Click **Yes**



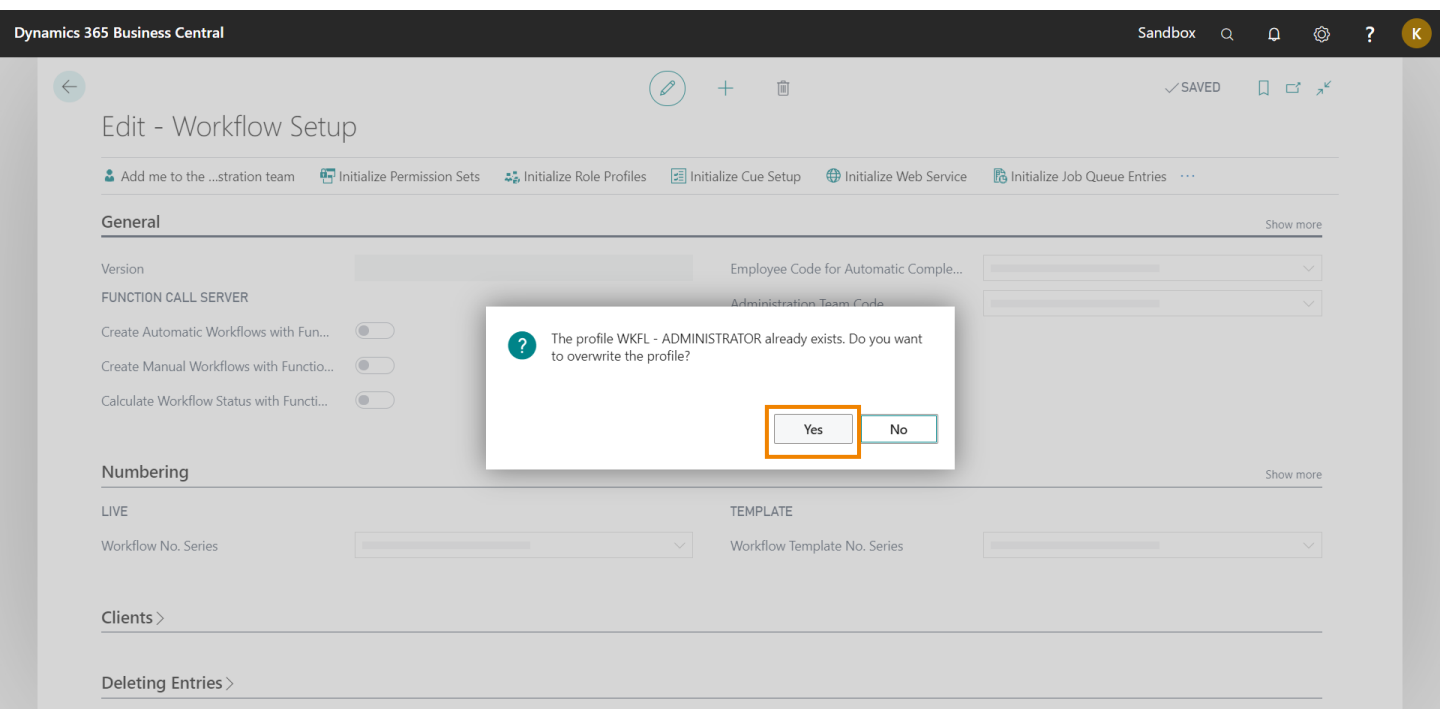
Basic Setup

- 1) Click **Yes**



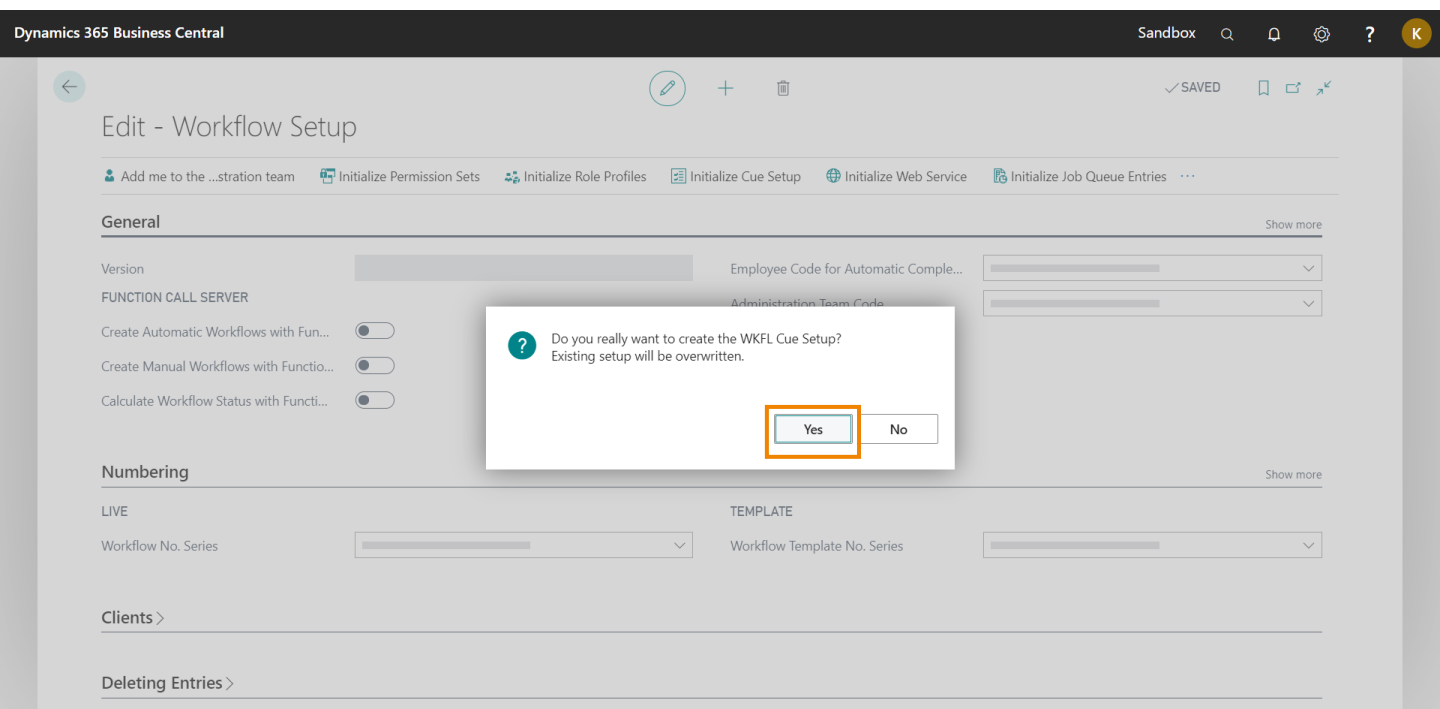
Basic Setup

1) Click **Yes**



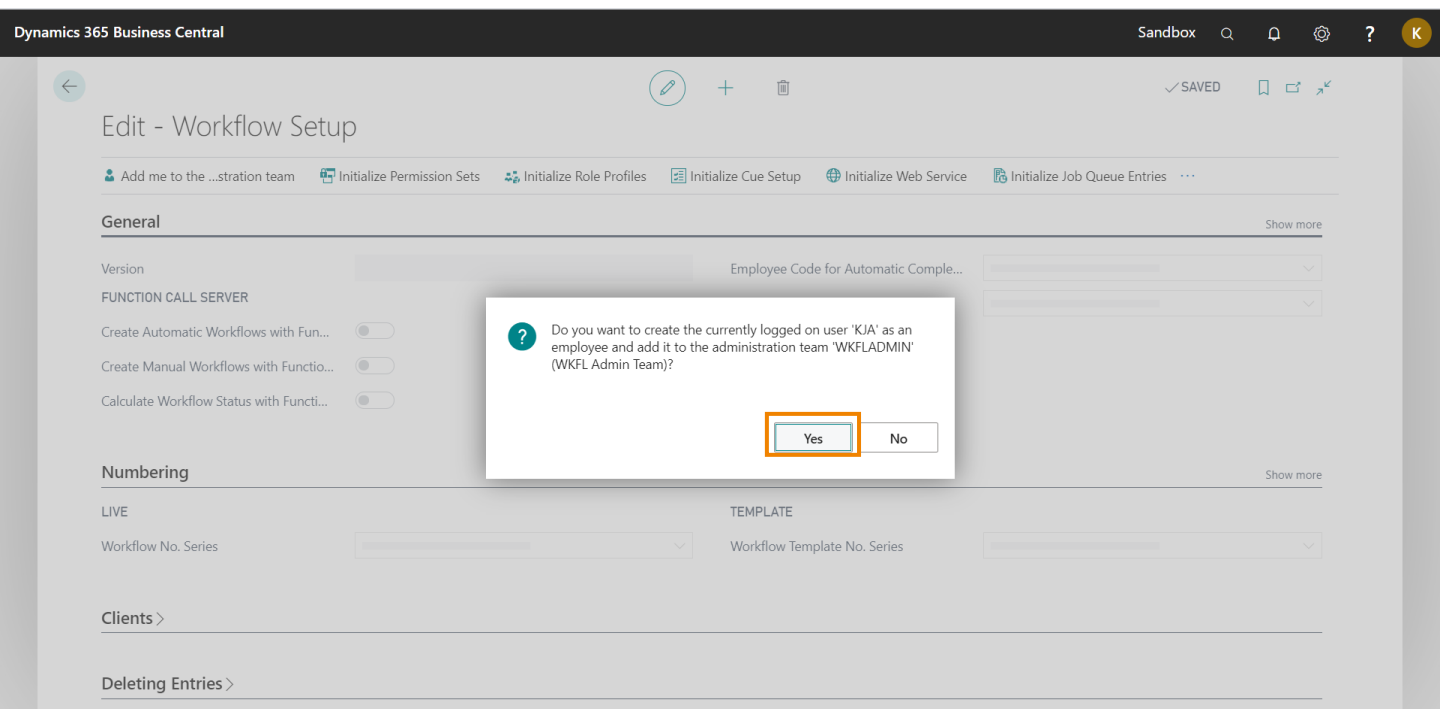
Basic Setup

- 1) Click **Yes**



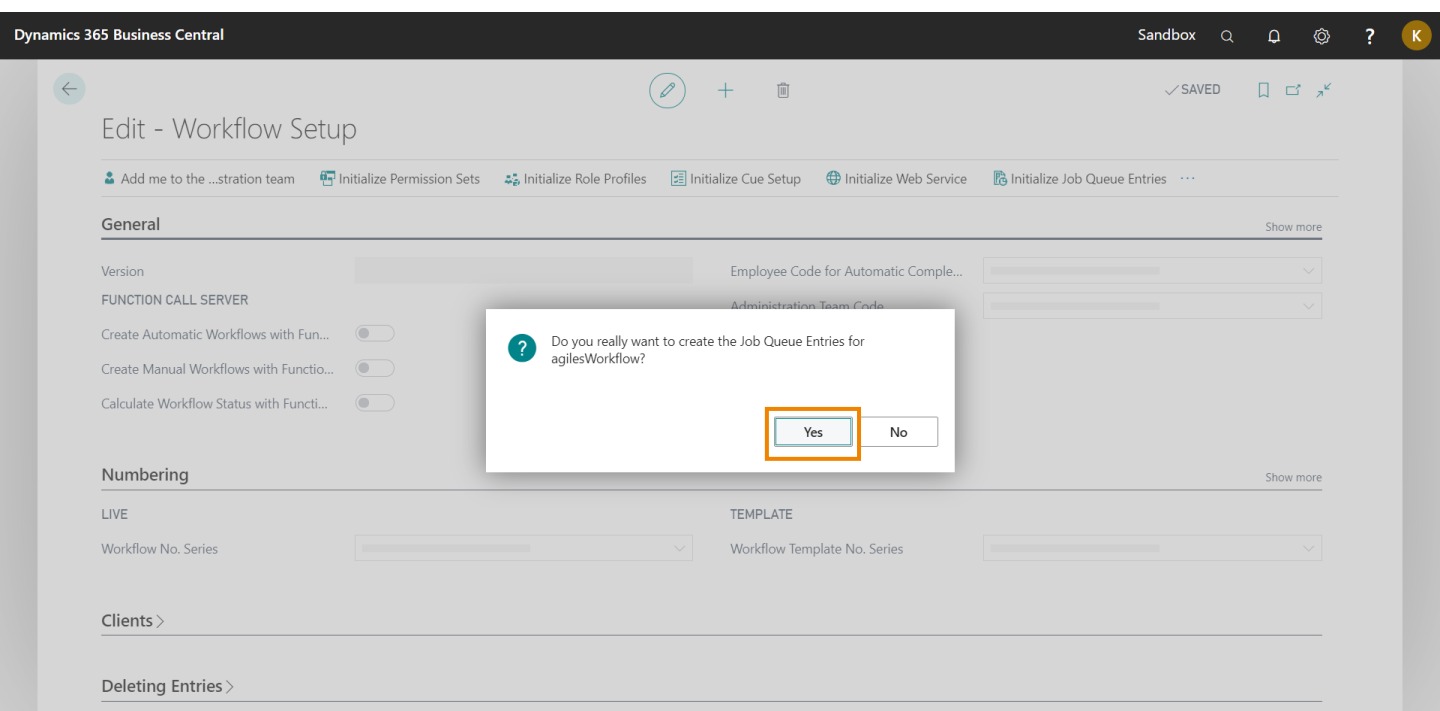
Basic Setup

- 1) Click **Yes**



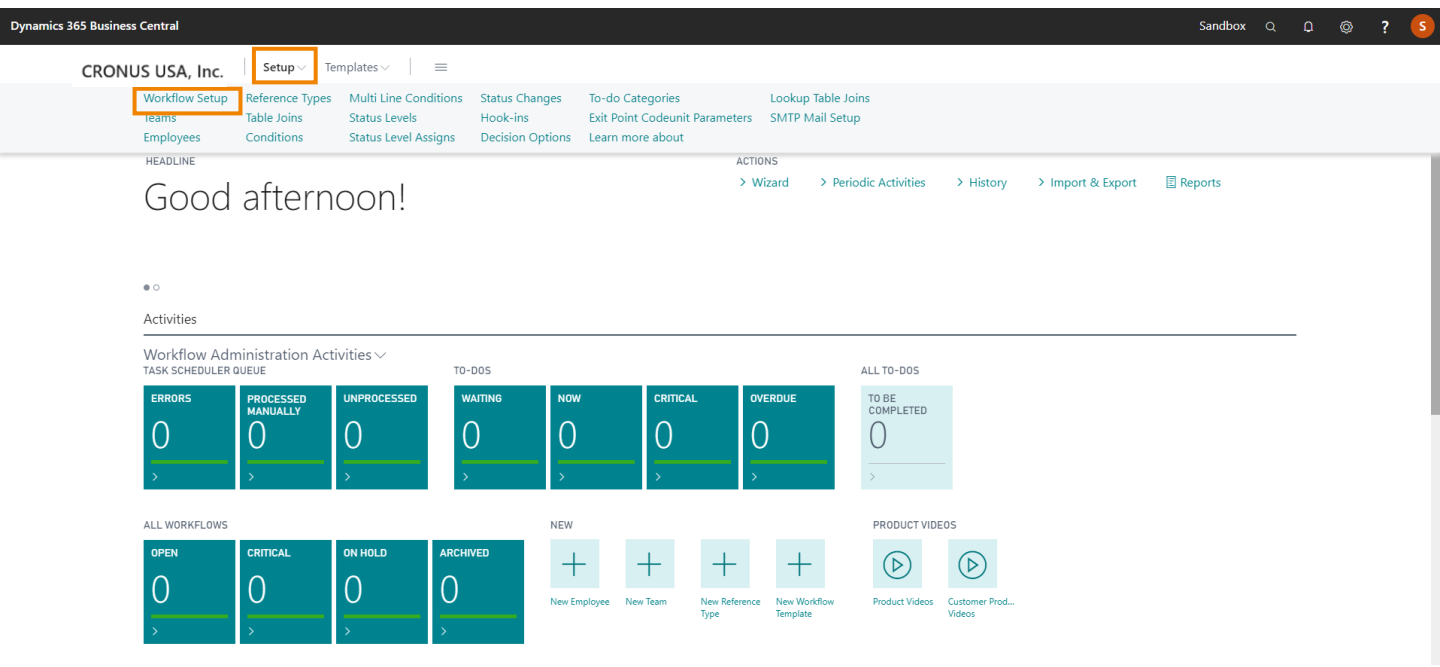
Basic Setup

- 1) Click **Yes**



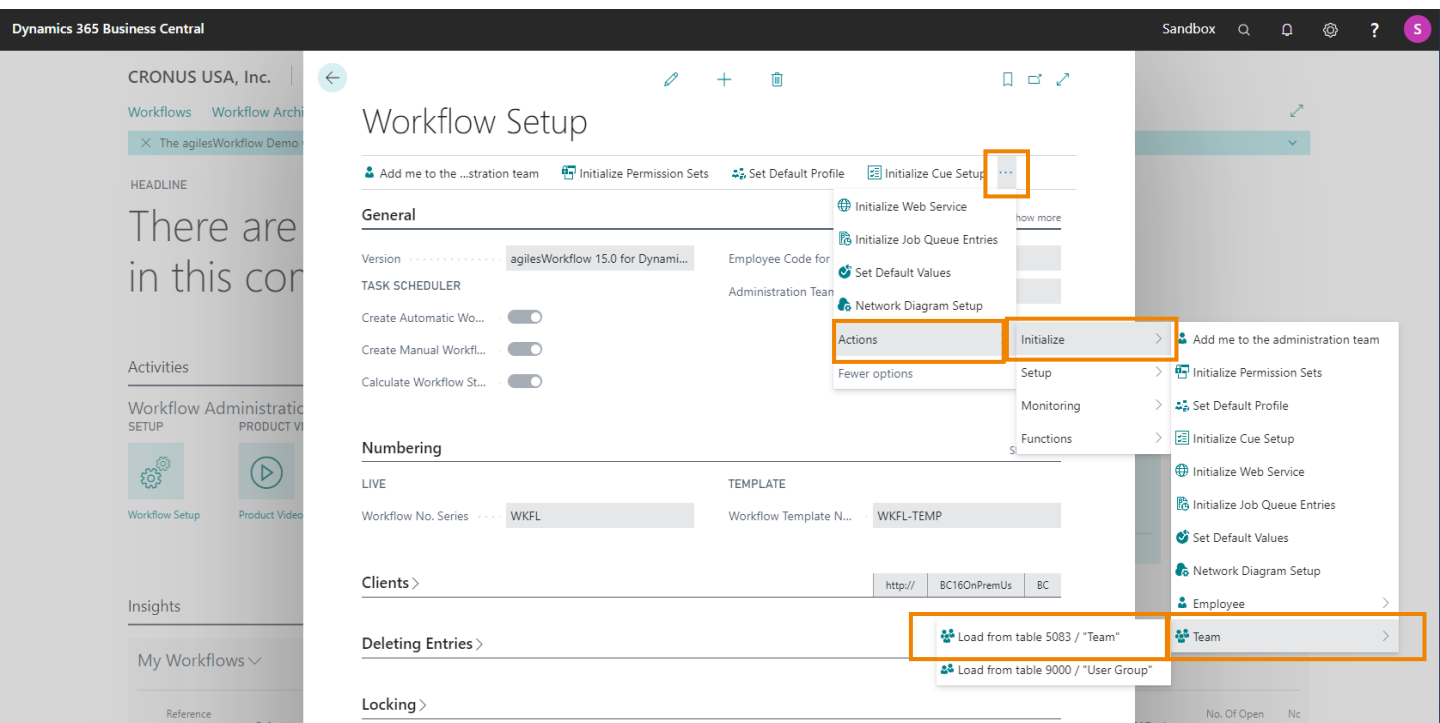
Basic Setup – Load Teams and Employees

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



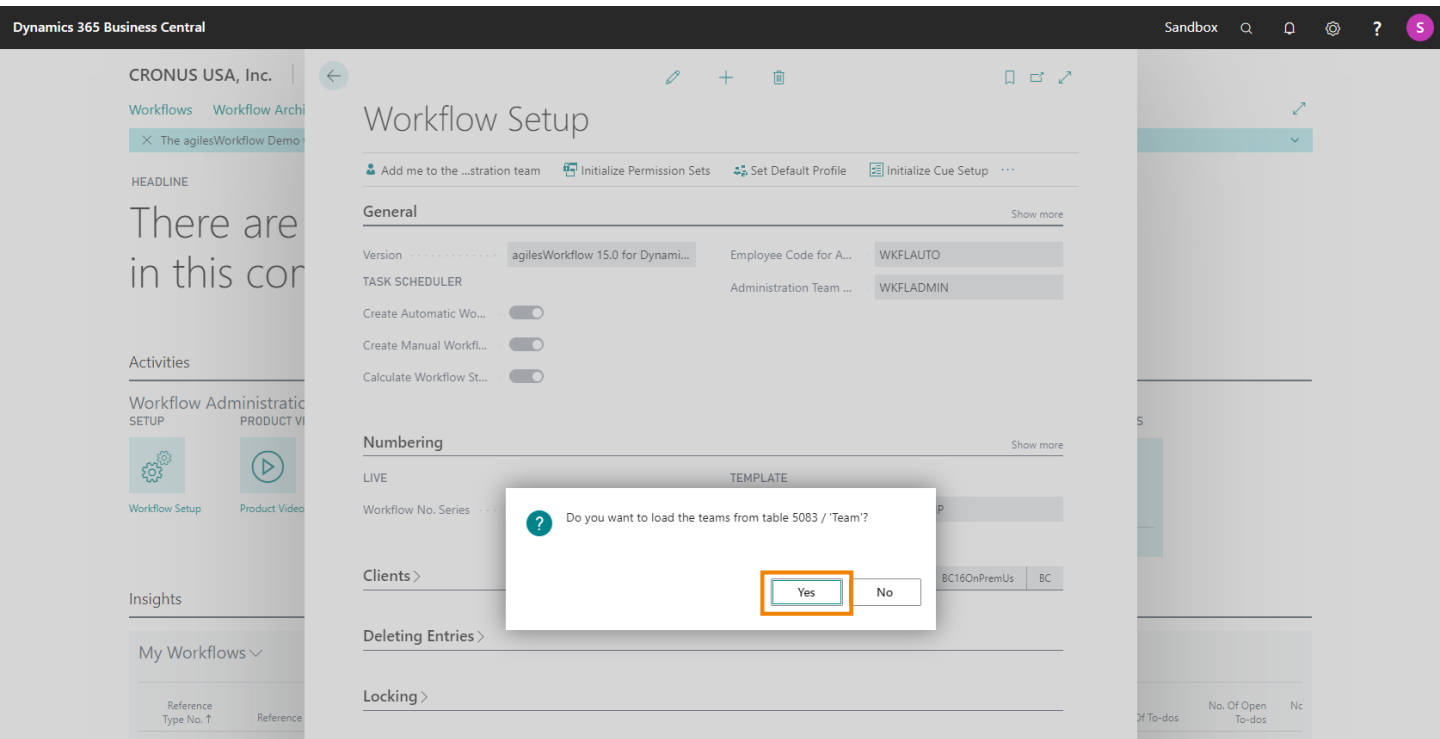
Basic Setup – Load Teams and Employees

- 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“**



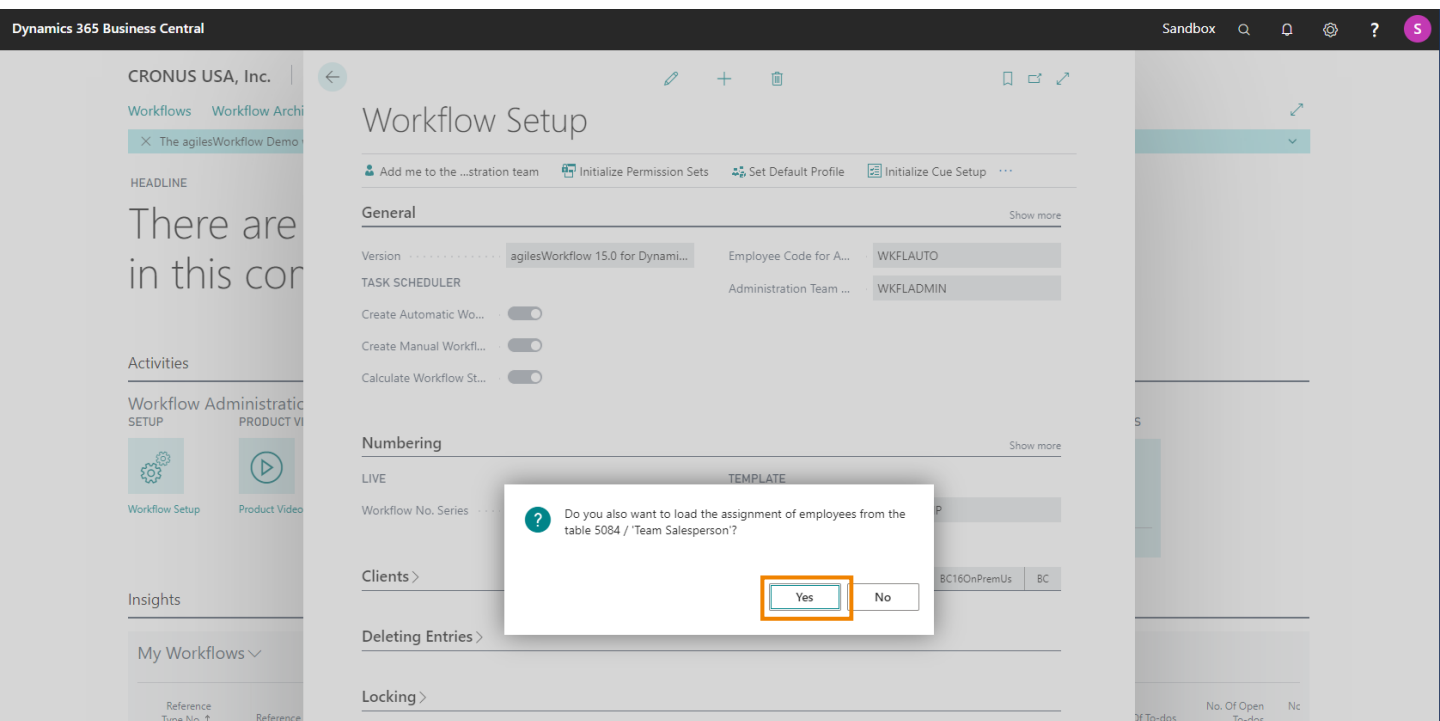
Basic Setup – Load Teams and Employees

- 1) Click on **Yes**



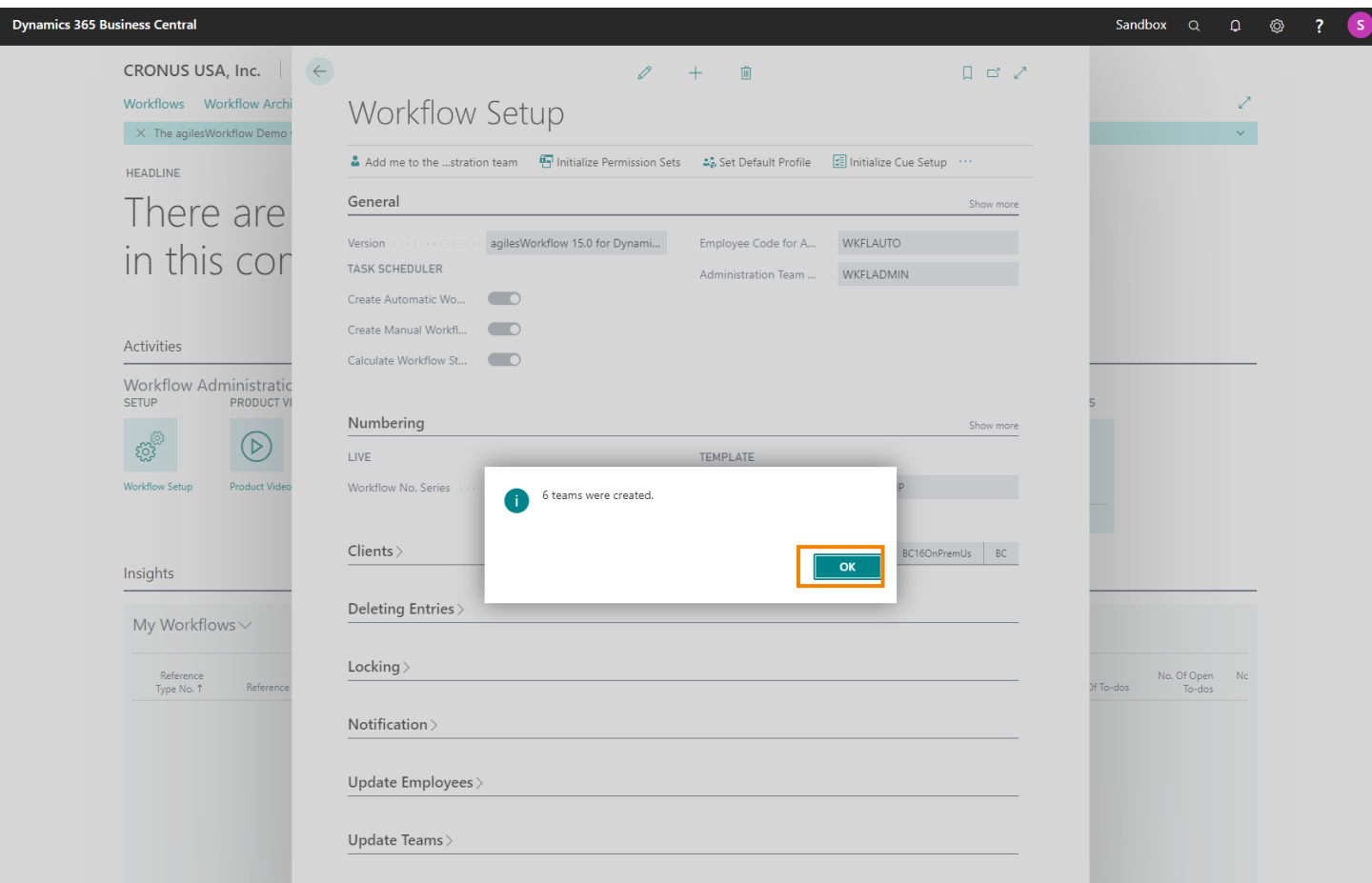
Basic Setup – Load Teams and Employees

- 1) Click on **Yes**



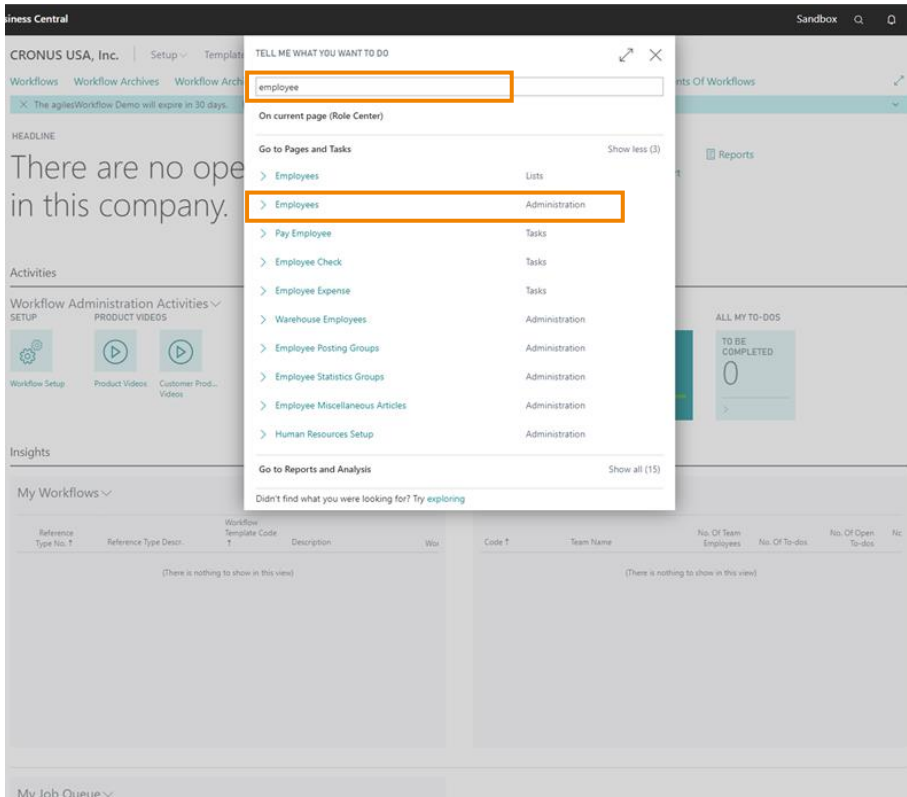
Basic Setup – Load Teams and Employees

- 1) Click on **Ok**



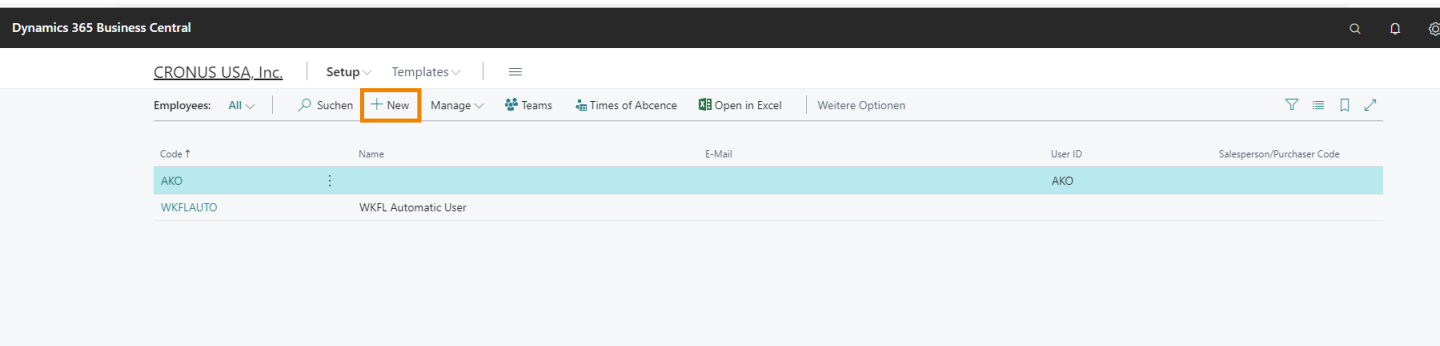
Basic Setup – Load Teams and Employees

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



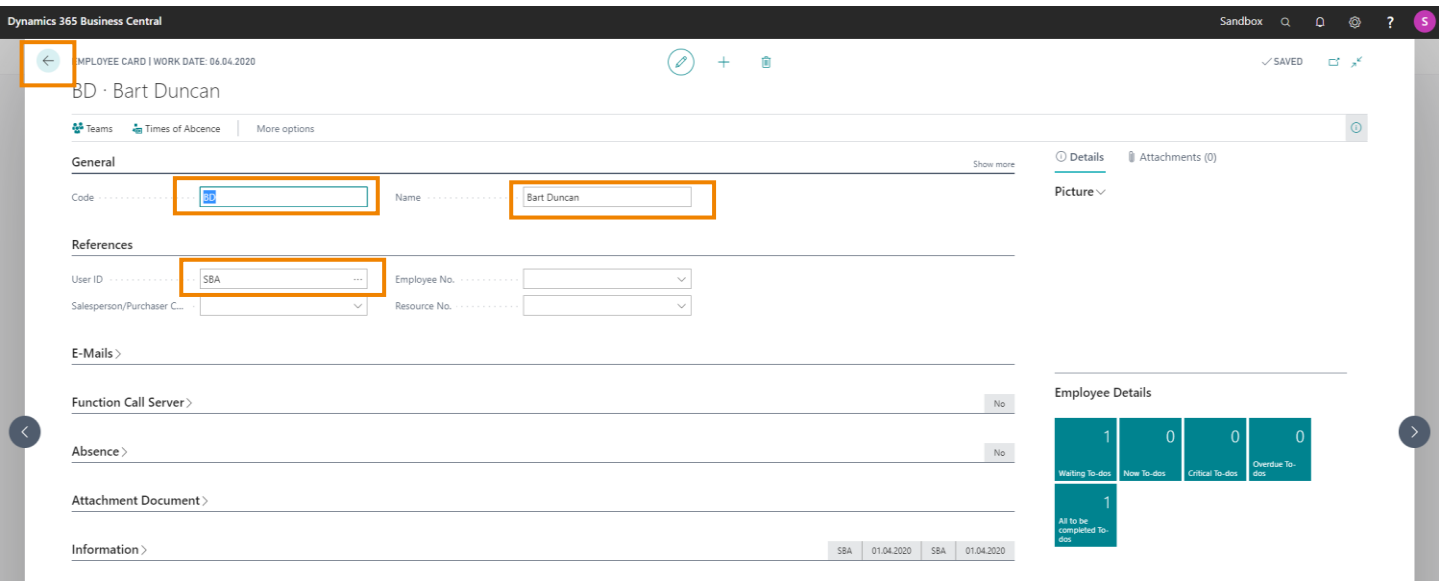
Basic Setup – Load Teams and Employees

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



Basic Setup – Load Teams and Employees

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



The screenshot shows the Dynamics 365 Business Central interface for an Employee Card. The card is titled "BD · Bart Duncan" and is for work date "06.04.2020". The "General" section contains the following fields:

- Code:
- Name:

The "References" section contains the following fields:

- User ID:
- Employee No.:
- Salesperson/Purchaser C.:
- Resource No.:

The "E-Mails" section is currently empty. The "Function Call Server" and "Absence" sections are both set to "No". The "Attachment Document" section is currently empty. The "Information" section shows the following data:

SBA	01.04.2020	SBA	01.04.2020
-----	------------	-----	------------

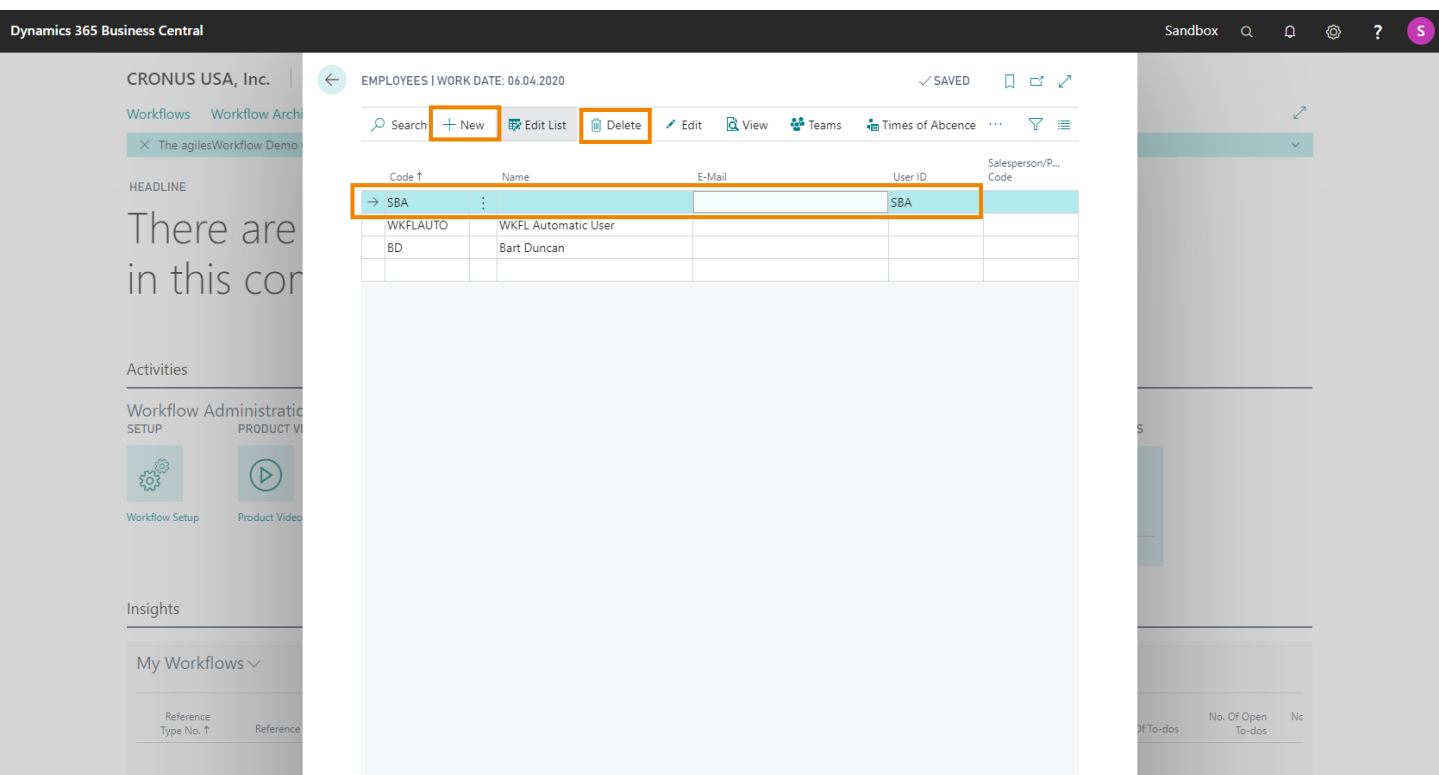
The "Employee Details" section shows the following summary:

Waiting To-dos	Now To-dos	Critical To-dos	Overdue To-dos
1	0	0	0

Below the summary, there is a bar chart showing "All to be completed To-dos" with a value of 1.

Basic Setup – Load Teams and Employees

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



The screenshot displays the Dynamics 365 Business Central interface for the 'EMPLOYEES' list view. The page title is 'EMPLOYEES | WORK DATE: 06.04.2020'. The command bar includes a search icon, a '+ New' button, an 'Edit List' button, a 'Delete' button, and other options like 'Edit', 'View', 'Teams', and 'Times of Absence'. The table below shows a list of employees with columns for Code, Name, E-Mail, User ID, and Salesperson/P... Code. The first row, with Code 'SBA' and Name 'WKFL Automatic User', is highlighted. The second row has Code 'BD' and Name 'Bart Duncan'.

Code ↑	Name	E-Mail	User ID	Salesperson/P... Code
→ SBA	WKFL Automatic User		SBA	
WKFLAUTO	WKFL Automatic User			
BD	Bart Duncan			

Basic Setup – Load Teams and Employees

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

Dynamics 365 Business Central

Sandbox

EMPLOYEE CARD | WORK DATE: 06.04.2020

AH · Annette

Teams Times of Absence More options

General Show more

Code Name

References

User ID Employee No.

Salesperson/Purchaser Code Resource No.

E-Mails >

Function Call Server > No

Absence > No

Attachment Document >

Information > SBA 01.04.2020

Details Attachments (0)

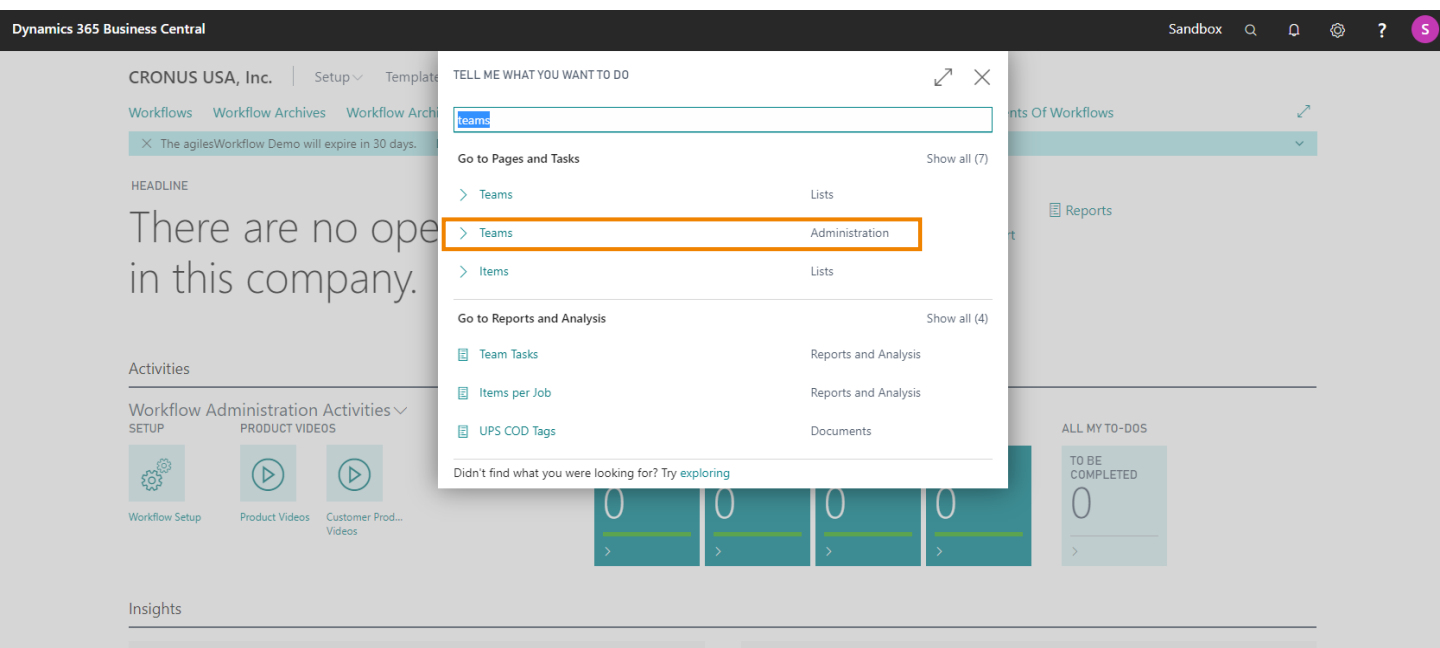
Picture v

Employee Details

0	0	0
Waiting To-dos	Now To-dos	Critical To-dos
0	0	
Overdue To-dos	All to be completed To-dos	

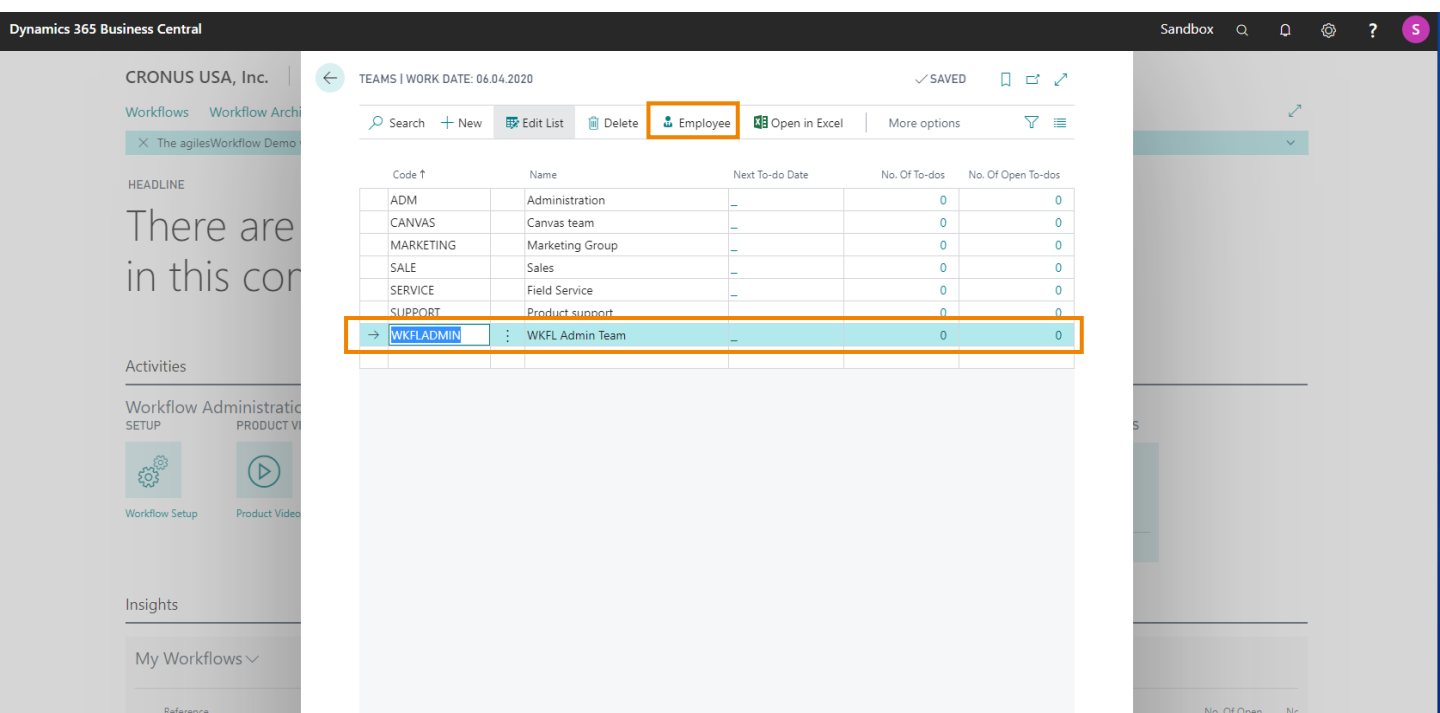
Basic Setup – Load Teams and Employees

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



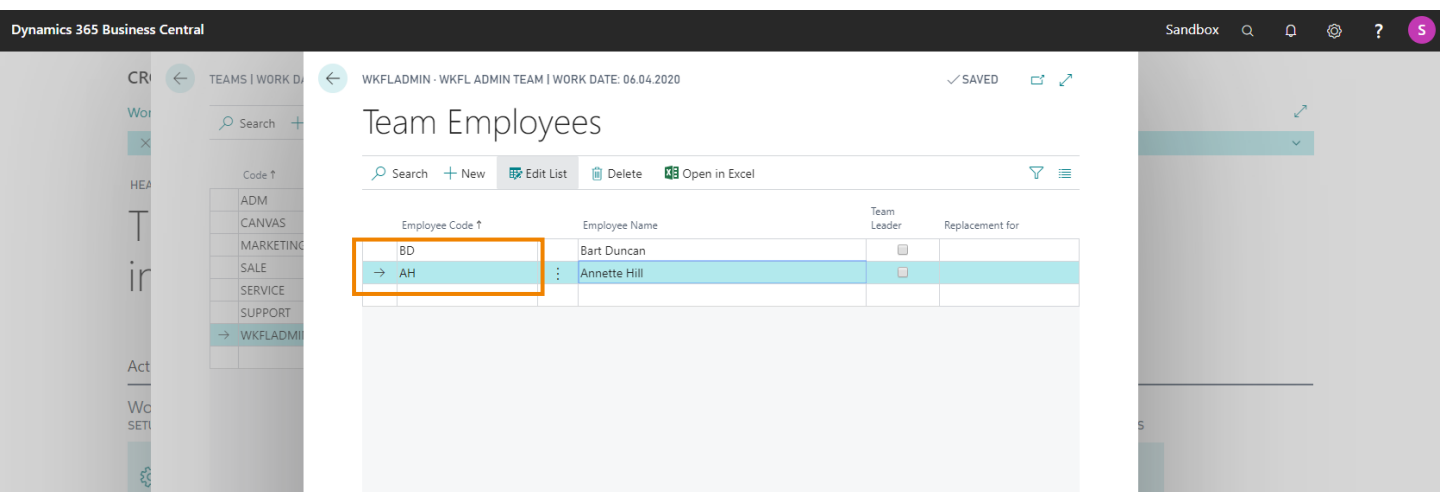
Basic Setup – Load Teams and Employees

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



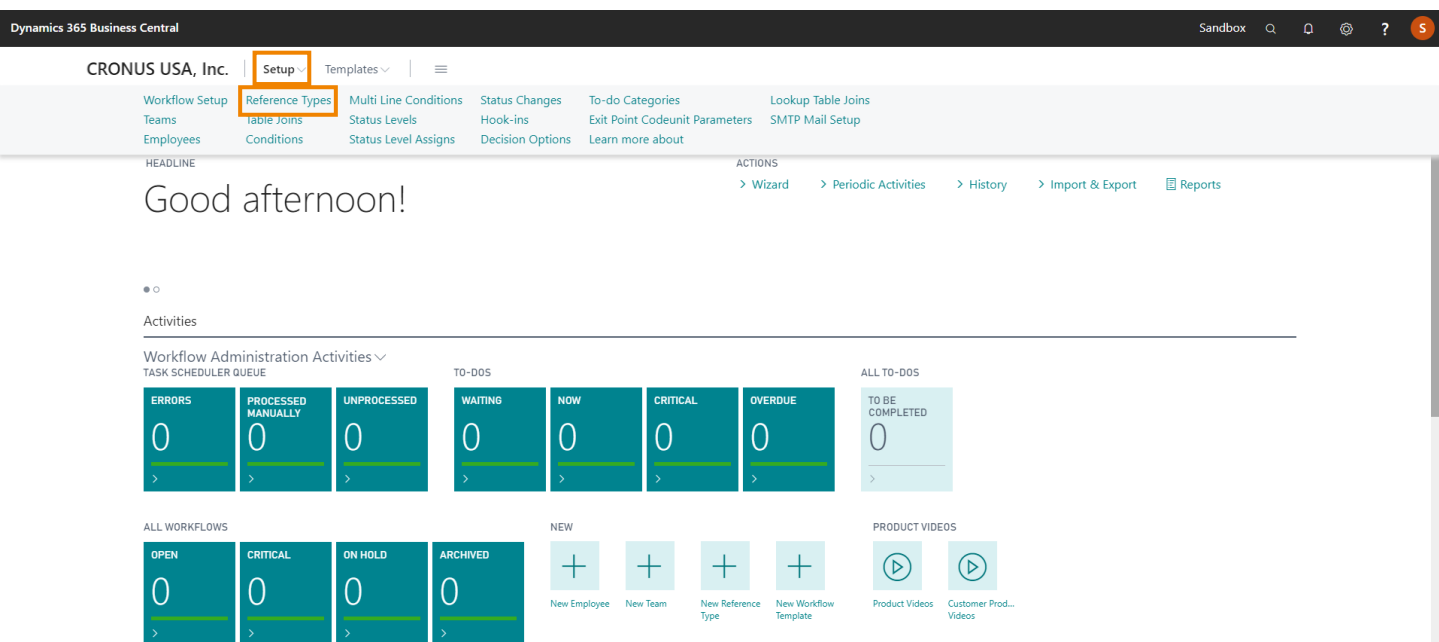
Basic Setup – Load Teams and Employees

- 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



Basic Setup

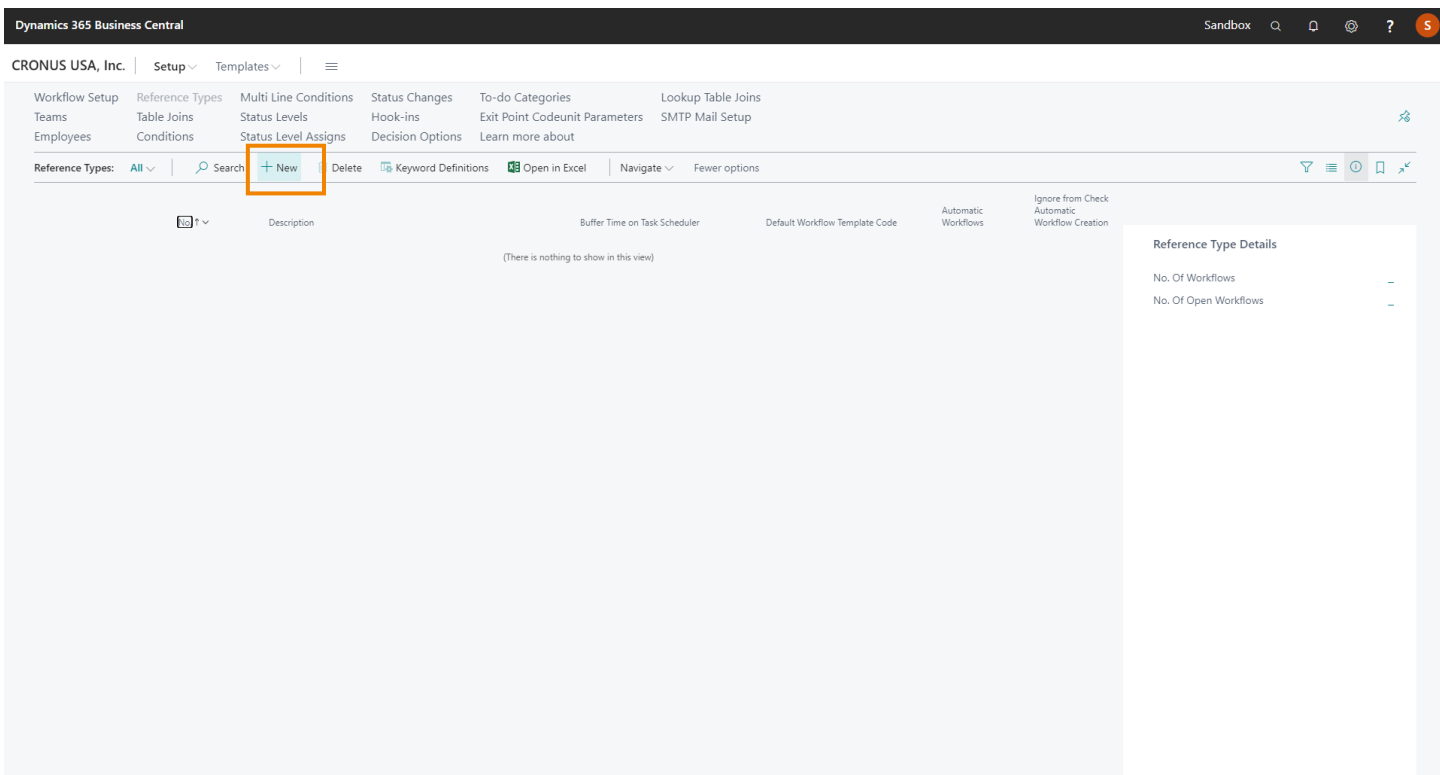
- 1) Click on **Setup**
- 2) Click on **Reference Types**



The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The top navigation bar includes 'Setup' and 'Reference Types' (highlighted with an orange box). The main content area shows a 'Good afternoon!' headline and a 'Workflow Administration Activities' section. This section contains several task scheduler queue cards: 'ERRORS', 'PROCESSED MANUALLY', 'UNPROCESSED', 'WAITING', 'NOW', 'CRITICAL', 'OVERDUE', and 'TO BE COMPLETED'. Below these are 'ALL WORKFLOWS' cards for 'OPEN', 'CRITICAL', 'ON HOLD', and 'ARCHIVED', along with 'NEW' cards for 'New Employee', 'New Team', 'New Reference Type', and 'New Workflow Template'. 'PRODUCT VIDEOS' cards for 'Product Videos' and 'Customer Prod... Videos' are also visible.

Basic Setup

1) Click on **+New**



Basic Setup

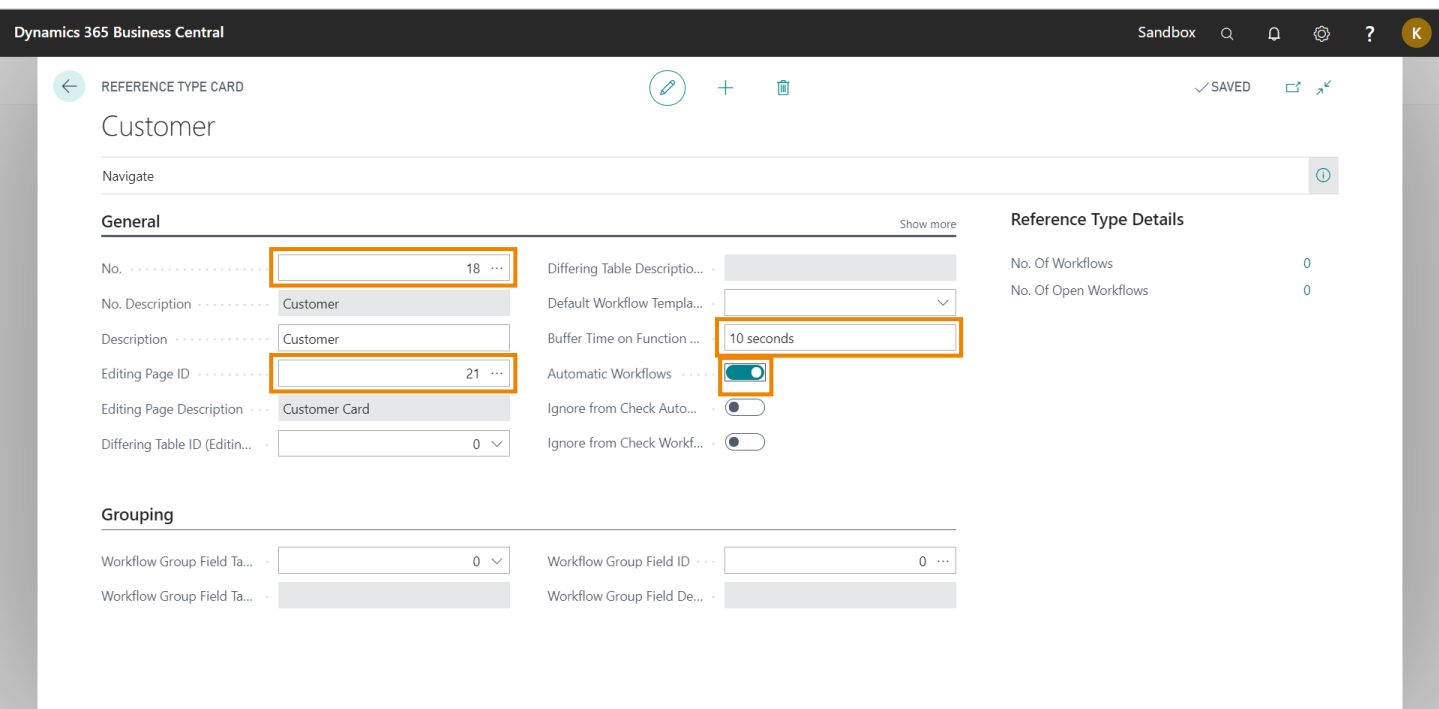
1) General:

Select No. → 18

Select Editing Page ID → 21

Enter Buffer Time on Task Scheduler → 10 seconds

Activate Automatic Workflows



Dynamics 365 Business Central

Sandbox

REFERENCE TYPE CARD

Customer

Navigate

General Show more

No.	18 ...	Differing Table Descriptio...	
No. Description	Customer	Default Workflow Templa...	
Description	Customer	Buffer Time on Function ...	10 seconds
Editing Page ID	21 ...	Automatic Workflows	<input checked="" type="checkbox"/>
Editing Page Description	Customer Card	Ignore from Check Auto...	<input type="checkbox"/>
Differing Table ID (Editin...	0	Ignore from Check Workf...	<input type="checkbox"/>

Reference Type Details

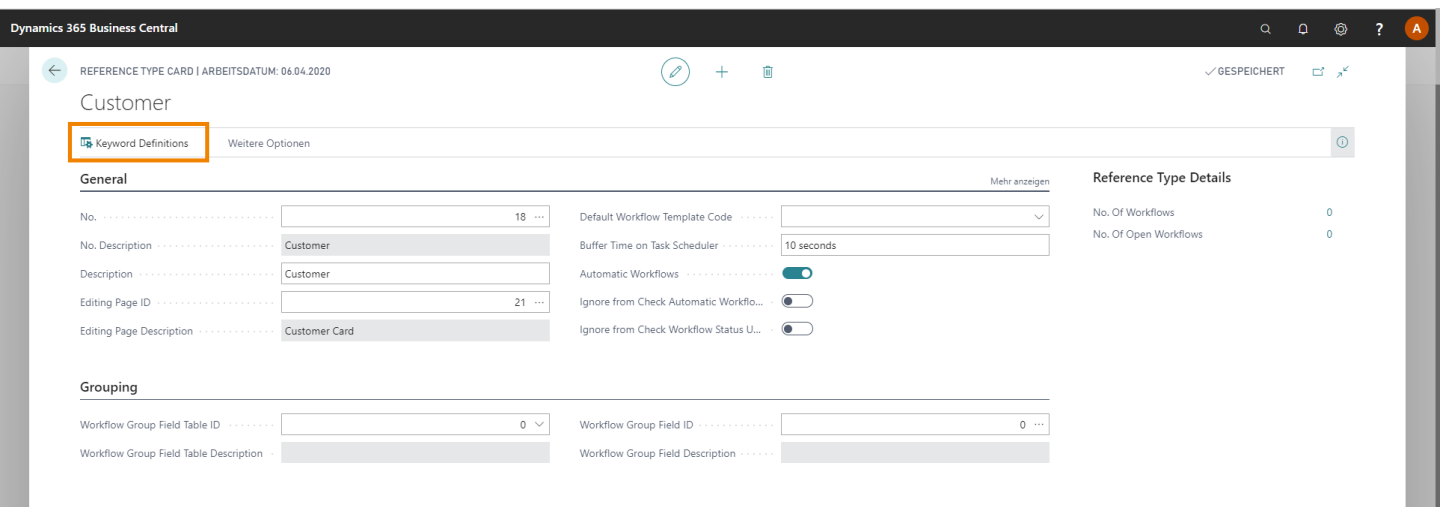
No. Of Workflows	0
No. Of Open Workflows	0

Grouping

Workflow Group Field Ta...	0	Workflow Group Field ID ...	0 ...
Workflow Group Field Ta...		Workflow Group Field De...	

Basic Setup

- 1) Click on **Keyword Definitions**



Basic Setup

- 1) Define Keywords as Information about the Data Item (e. g.)

First line

Enter Table ID → 18

Select Field ID → 1

Second line

Enter Table ID → 18

Select Field ID → 2

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

Dynamics 365 Business Central

Sandbox

REFERENCE CUSTOMER NOT SAVED

Edit - Workflow Keyword Definitions - Customer

Search + New Edit List Delete Open in Excel

Table ID	Table Description	Field ID	Field Description	Use in Wor...	Use in To-do Gro...	Use in To-do	Use in E-mail Noti...
18	Customer	1	No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
18	Customer	2	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Workflow G
Workflow G

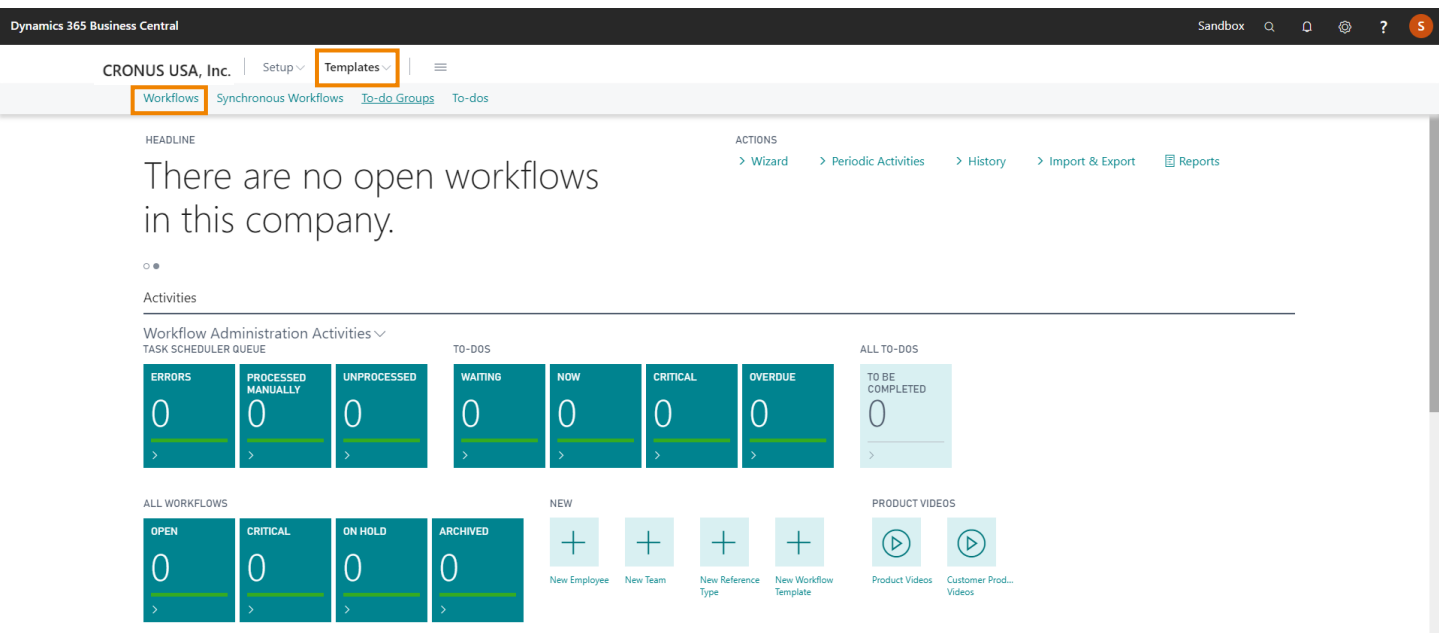
Type Details
flows 0
n Workflows 0

Scenario 1

New Customer

Scenario 1: New Customer – Workflow Template

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



Dynamics 365 Business Central | Sandbox

CRONUS USA, Inc. | Setup | **Templates** |

Workflows | Synchronous Workflows | To-do Groups | To-dos

HEADLINE

There are no open workflows in this company.

ACTIONS

- > Wizard
- > Periodic Activities
- > History
- > Import & Export
- Reports

Activities

Workflow Administration Activities

TASK SCHEDULER QUEUE

ERRORS	PROCESSED MANUALLY	UNPROCESSED	WAITING	NOW	CRITICAL	OVERDUE	ALL TO-DOS
0	0	0	0	0	0	0	0

ALL WORKFLOWS

OPEN	CRITICAL	ON HOLD	ARCHIVED
0	0	0	0

NEW

- + New Employee
- + New Team
- + New Reference Type
- + New Workflow Template

PRODUCT VIDEOS

- Product Videos
- Customer Prod... Videos

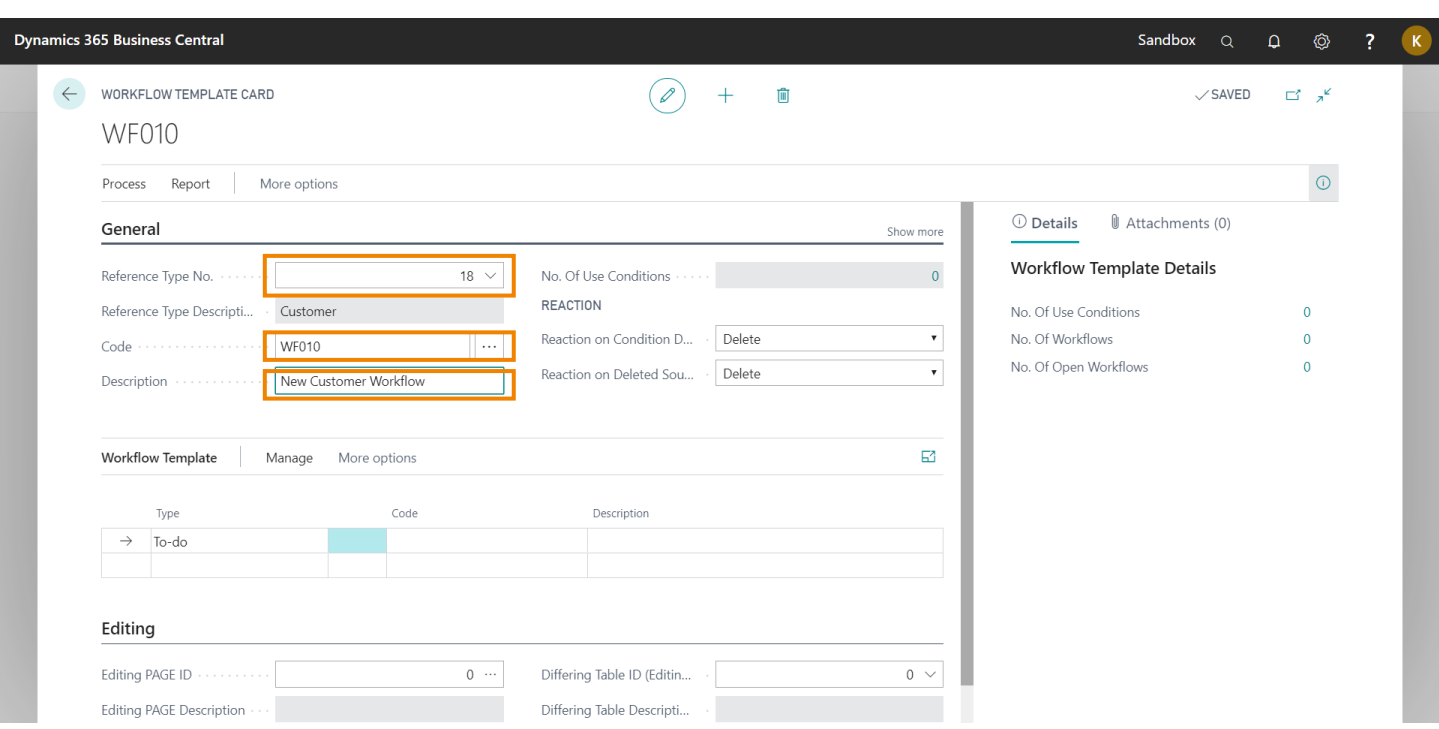
Scenario 1: New Customer – Workflow Template

1) General:

Use look up value Reference Type No. and select → 18

Enter Code → WF010

Enter Description → New Customer Workflow



The screenshot shows the 'Workflow Template Card' in Dynamics 365 Business Central. The card title is 'WF010'. The 'General' section contains the following fields:

- Reference Type No.: 18 (highlighted with an orange box)
- Reference Type Description: Customer
- Code: WF010 (highlighted with an orange box)
- Description: New Customer Workflow (highlighted with an orange box)
- No. Of Use Conditions: 0
- REACTION: Delete
- Reaction on Condition D...: Delete
- Reaction on Deleted Sou...: Delete

The 'Workflow Template' section shows a table with one entry:

Type	Code	Description
→ To-do		

The 'Editing' section contains the following fields:

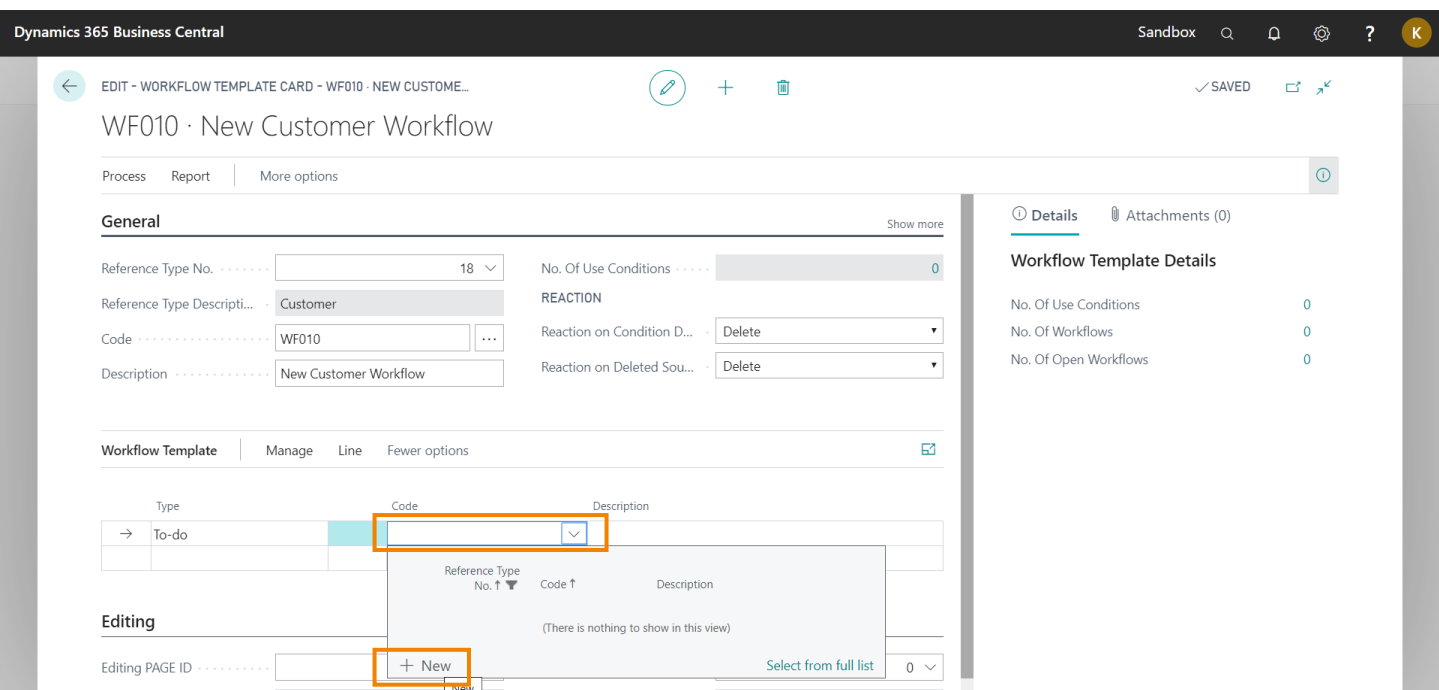
- Editing PAGE ID: 0
- Differing Table ID (Editin...): 0
- Editing PAGE Description:
- Differing Table Descripti...:

The right-hand pane shows 'Workflow Template Details' with the following statistics:

- No. Of Use Conditions: 0
- No. Of Workflows: 0
- No. Of Open Workflows: 0

Scenario 1: New Customer – Workflow Template

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

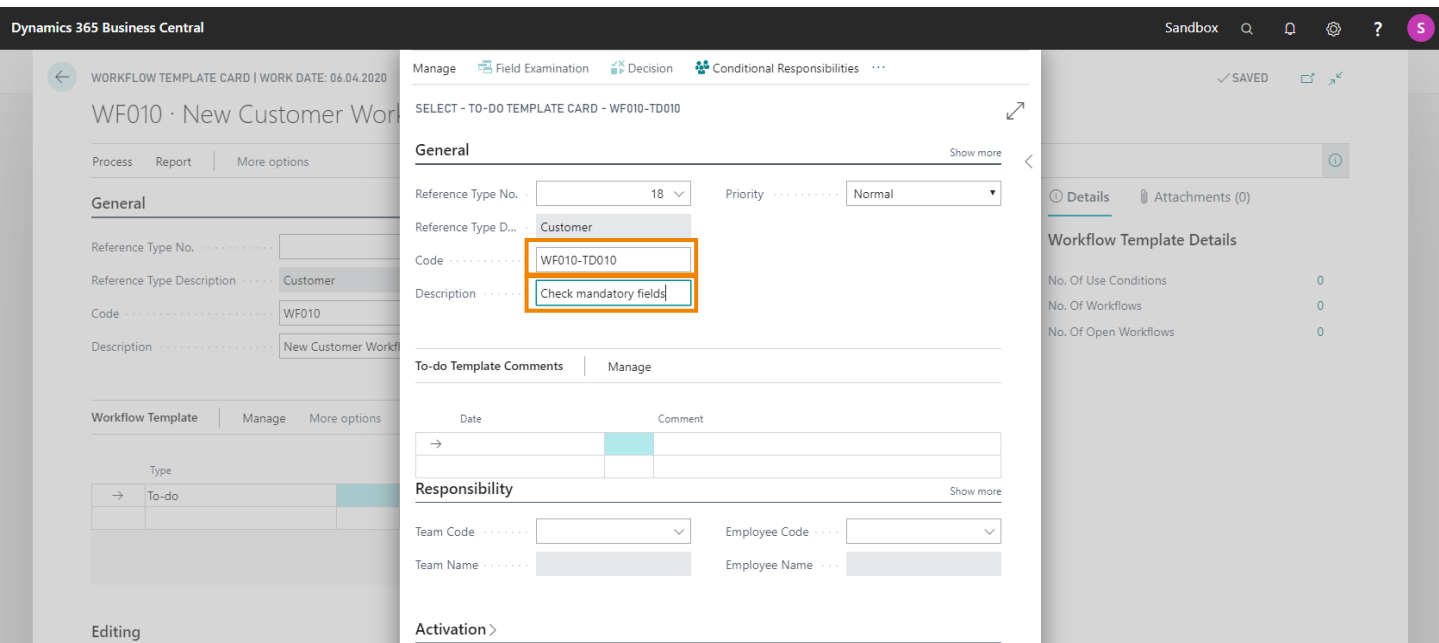


The screenshot shows the Dynamics 365 Business Central interface for editing a workflow template card. The title is "WF010 · New Customer Workflow". The form is divided into several sections:

- General:** Contains fields for Reference Type No. (18), Reference Type Description (Customer), Code (WF010), and Description (New Customer Workflow). It also includes a REACTION section with dropdowns for Reaction on Condition D... (Delete) and Reaction on Deleted Sou... (Delete).
- Workflow Template:** A table with columns for Type, Code, and Description. The first row shows "To-do" with a dropdown arrow next to the Code field.
- Editing:** Contains an "Editing PAGE ID" field with a "+ New" button highlighted in orange.
- Details Panel:** On the right, it shows "Workflow Template Details" with statistics: No. Of Use Conditions (0), No. Of Workflows (0), and No. Of Open Workflows (0).

Scenario 1: New Customer – Workflow Template

- 1) Enter Code **WF010-TD010**
- 2) Enter Description **Check mandatory fields**



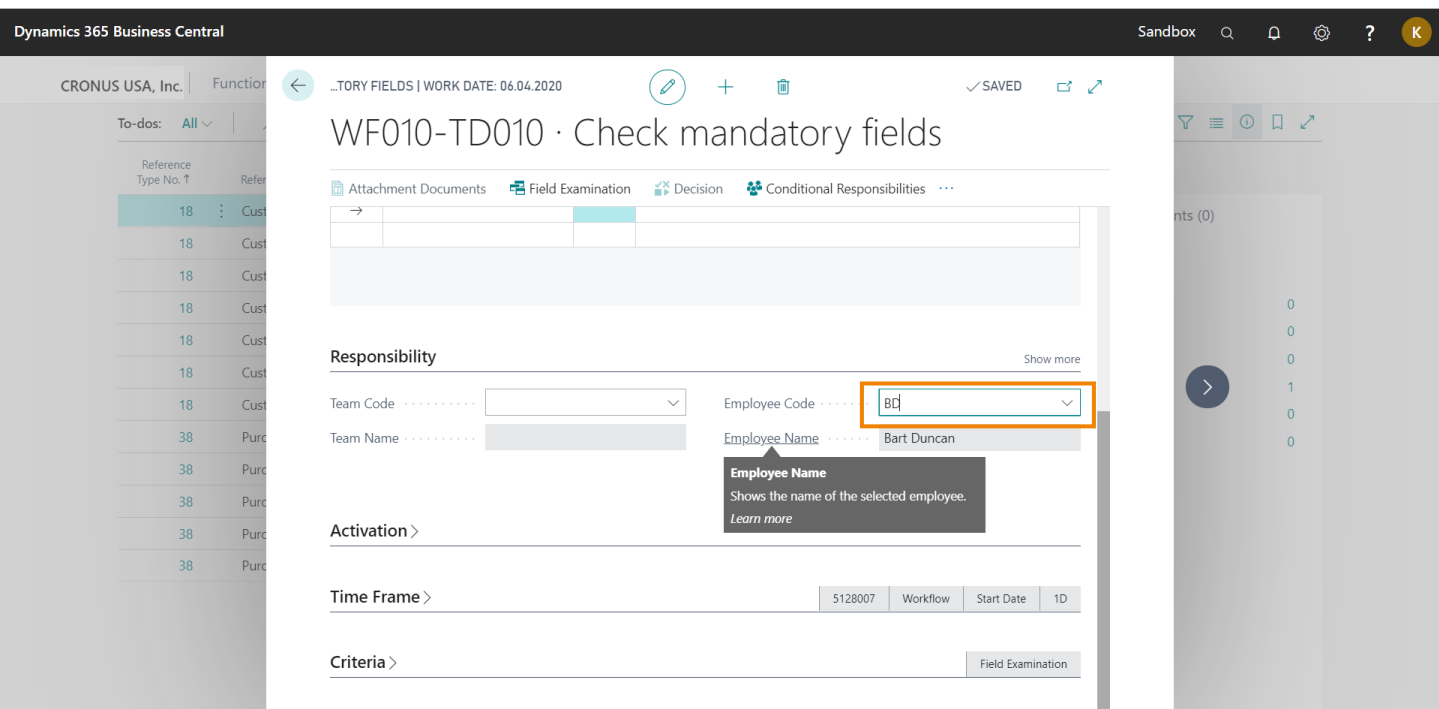
The screenshot displays the Dynamics 365 Business Central interface for creating a new workflow template. The main form is titled "SELECT - TO-DO TEMPLATE CARD - WF010-TD010". The "General" section is expanded, showing the following fields:

- Reference Type No.: 18
- Reference Type Description: Customer
- Code: WF010-TD010
- Description: Check mandatory fields

The "Code" and "Description" fields are highlighted with orange boxes, corresponding to the steps in the scenario. The "To-do Template Comments" section is also visible, with a table for adding comments. The "Responsibility" section includes fields for Team Code, Employee Code, Team Name, and Employee Name. The "Activation" section is partially visible at the bottom.

Scenario 1: New Customer – Workflow Template

- 1) **Responsibility:** Use look up value Employee Code and select → **BD**



The screenshot displays the Dynamics 365 Business Central interface for configuring a workflow template. The main window title is "WF010-TD010 · Check mandatory fields". The "Responsibility" section is expanded, showing the following configuration:

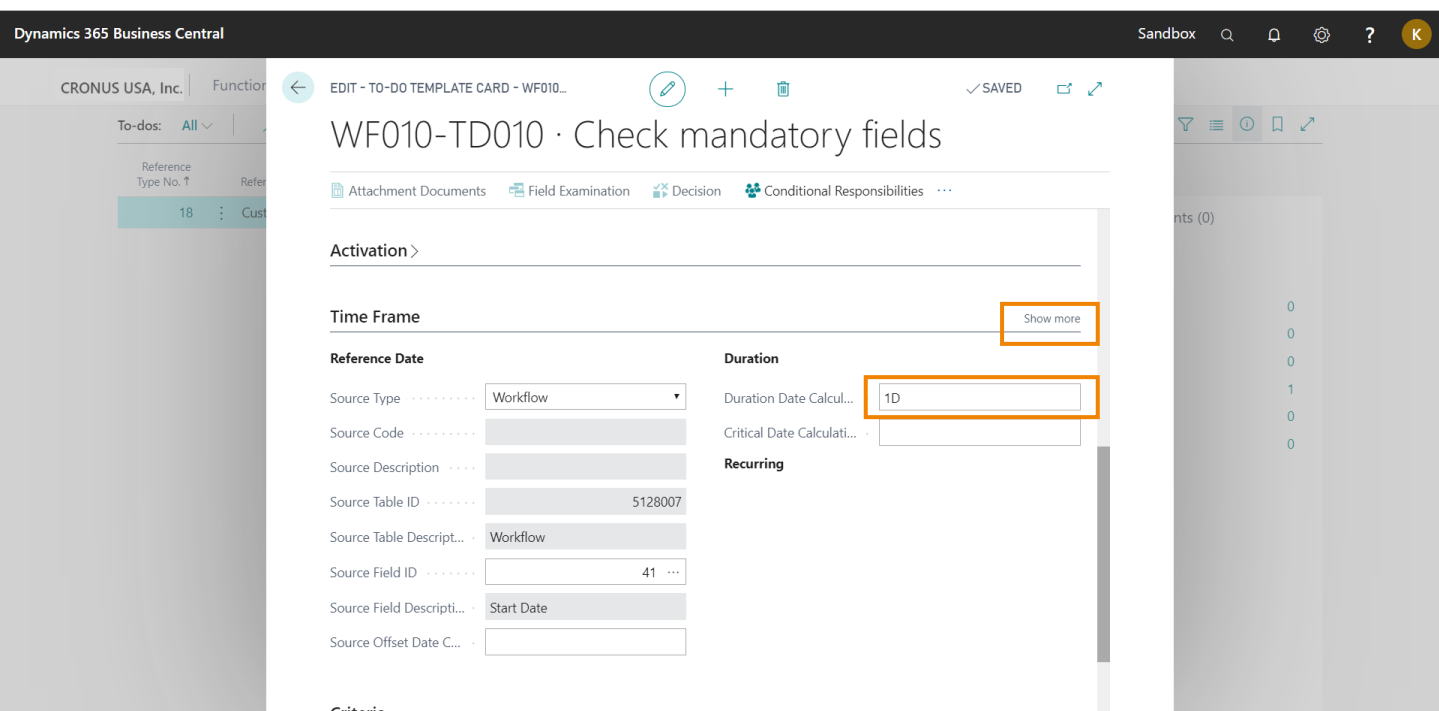
- Team Code:** [Dropdown menu]
- Employee Code:** [Dropdown menu with "BD" selected]
- Employee Name:** Bart Duncan

A tooltip for "Employee Name" states: "Shows the name of the selected employee. Learn more".

Other sections visible include "Activation", "Time Frame" (with values 5128007, Workflow, Start Date, 1D), and "Criteria" (with Field Examination).

Scenario 1: New Customer – Workflow Template

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

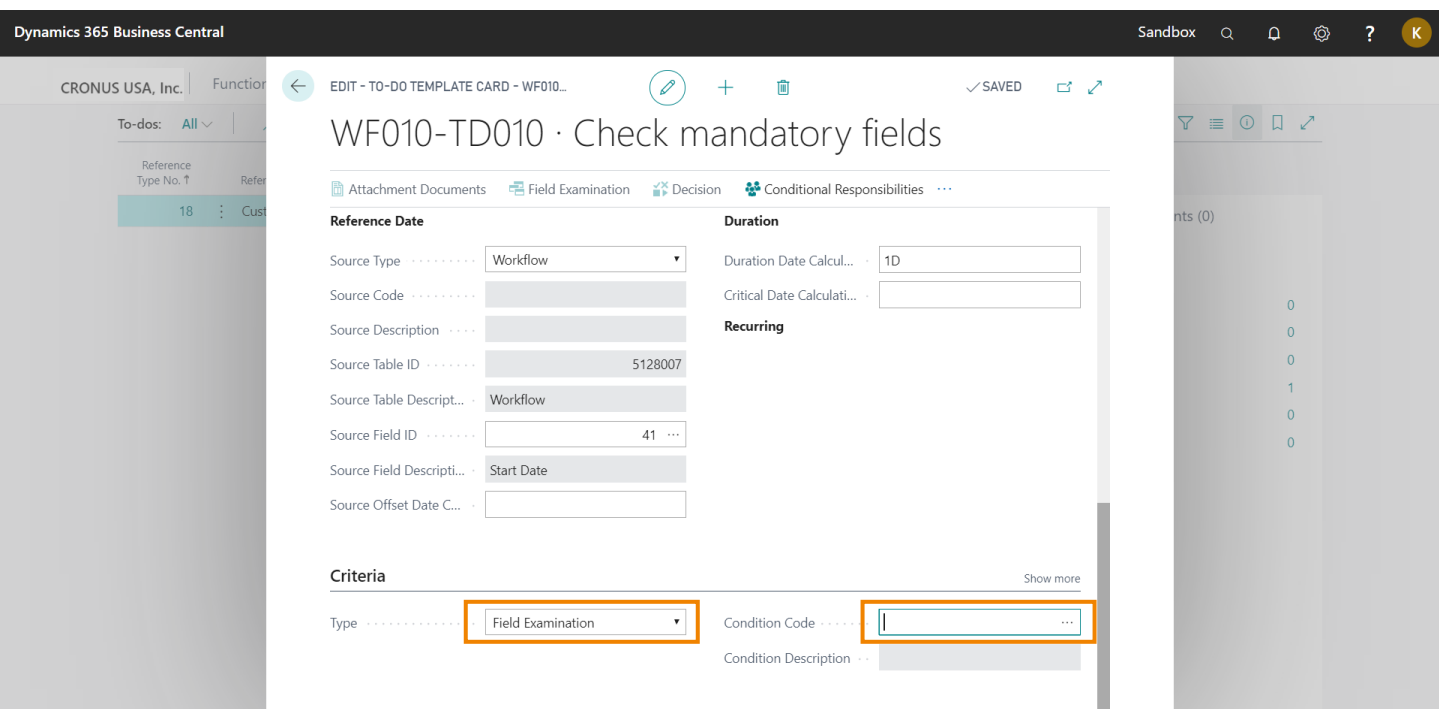


The screenshot displays the Dynamics 365 Business Central interface for editing a workflow template card. The main title is "WF010-TD010 · Check mandatory fields". The "Time Frame" section is expanded, showing a "Show more" button. The "Duration" section is also expanded, showing the "Duration Date Calculation" field set to "1D".

Reference Date	Duration
Source Type: Workflow	Duration Date Calculation: 1D
Source Code: [Redacted]	Critical Date Calculation: [Redacted]
Source Description: [Redacted]	Recurring: [Redacted]
Source Table ID: 5128007	
Source Table Description: Workflow	
Source Field ID: 41	
Source Field Description: Start Date	
Source Offset Date Calculation: [Redacted]	

Scenario 1: New Customer – Workflow Template

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



Dynamics 365 Business Central

CRONUS USA, Inc. | Function

EDIT - TO-DO TEMPLATE CARD - WF010... ✓ SAVED

WF010-TD010 · Check mandatory fields

Attachment Documents | Field Examination | Decision | Conditional Responsibilities

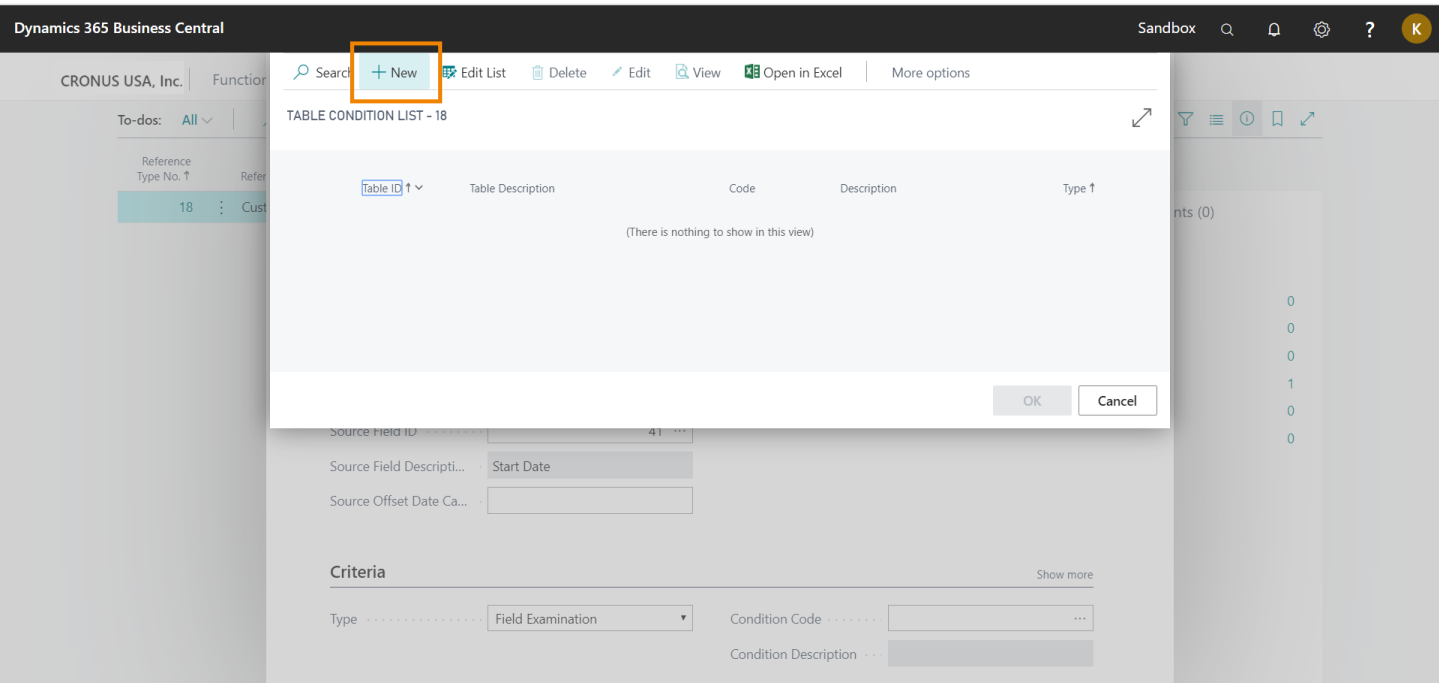
Reference Date	Duration
Source Type Workflow	Duration Date Calcul... 1D
Source Code	Critical Date Calculati...
Source Description	Recurring
Source Table ID 5128007	
Source Table Descripti... Workflow	
Source Field ID 41 ...	
Source Field Descripti... Start Date	
Source Offset Date C...	

Criteria Show more

Type	Field Examination	Condition Code	
		Condition Description ...	

Scenario 1: New Customer – Table Condition

- 1) Click on **+New**



The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' on the left and 'Sandbox' on the right. The main content area is titled 'TABLE CONDITION LIST - 18'. A toolbar at the top of this view includes a search icon, a '+ New' button (highlighted with an orange box), and other actions like 'Edit List', 'Delete', 'Edit', 'View', and 'Open in Excel'. Below the toolbar is a table with columns: 'Table ID', 'Table Description', 'Code', 'Description', and 'Type'. The table is currently empty, with the message '(There is nothing to show in this view)' centered below the headers. At the bottom right of the table view, there are 'OK' and 'Cancel' buttons. Below the table view, there are input fields for 'Source Field ID', 'Source Field Description', and 'Source Offset Date Ca...'. A 'Criteria' section is also visible, with a dropdown menu set to 'Field Examination' and fields for 'Condition Code' and 'Condition Description'.

Scenario 1: New Customer – Table Condition

1) General:

Automatically entered Table ID → 18

Enter Code → WF010-C010

Enter Description → Check mandatory fields

2) Table Condition: Enter the following conditions in lines

Type → Field, Field ID → 2, Filter → <>“

Type → Field, Field ID → 21, Filter → <>“

Type → Field, Field ID → 88, Filter → <>“

Type → Field, Field ID → 110, Filter → <>“

Type → Field, Field ID → 20, Filter → >0

3) Close page

4) Click on Ok

Dynamics 365 Business Central | Sandbox

TABLE CONDITION CARD

WF010-CO10 · Check mandatory fields

General

Table ID: 18 | Description: Check mandatory fields

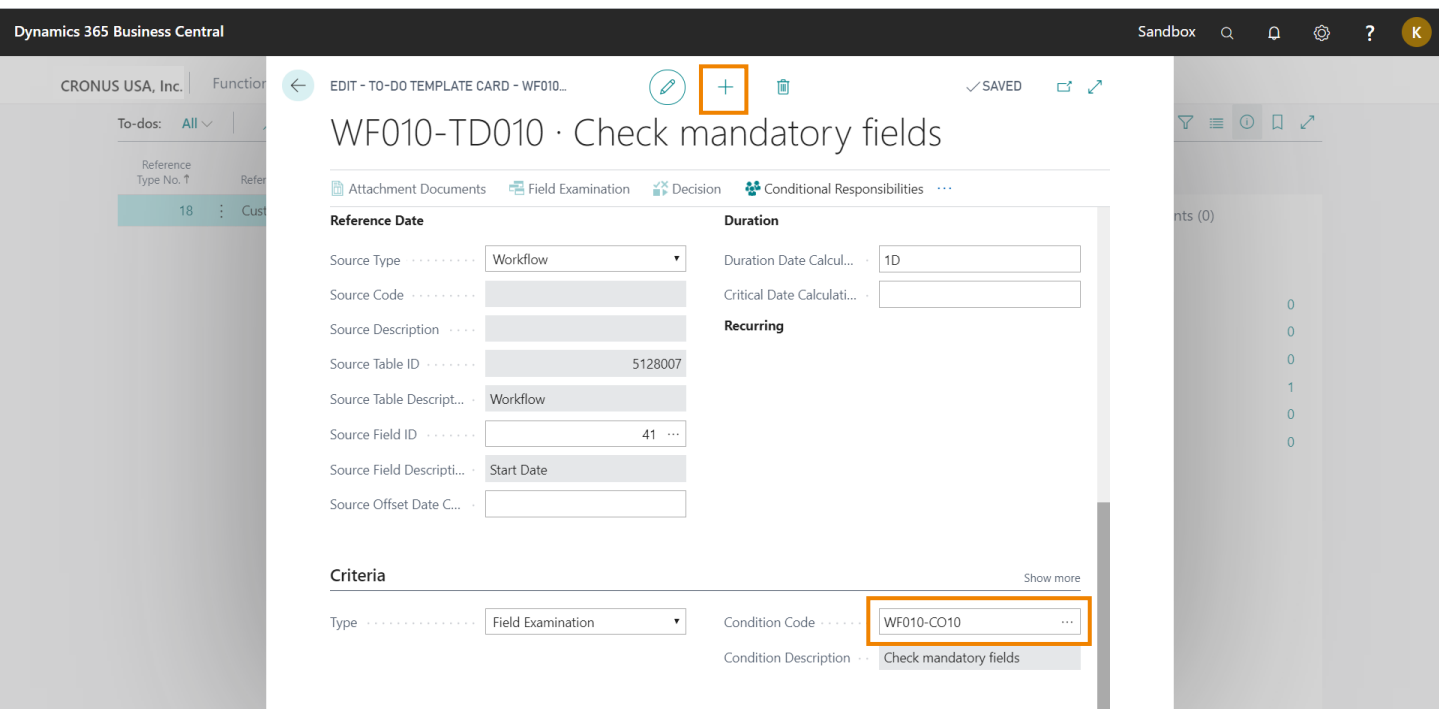
Table Description: Customer | Type: Field Examination

Code: WF010-CO10

Type	Table ID	Field ID	Field Description	Filter	Editing Page ID	Editing Page Description	Differing Table ID (Editing Page)	Dif Pac
Field	18	2	Name	<>“	21	Customer Card		
Field	18	21	Customer Posting Group	<>“	21	Customer Card		
Field	18	88	Gen. Bus. Posting Group	<>“	21	Customer Card		
Field	18	110	VAT Bus. Posting Group	<>“	21	Customer Card		
Field	18	20	Credit Limit (LCY)	>0	21	Customer Card		

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



The screenshot shows the Dynamics 365 Business Central interface for editing a To-do Template Card. The card is titled "WF010-TD010 · Check mandatory fields". The interface includes a header with navigation icons and a "SAVED" status. The main content area is divided into several sections:

- Reference Date:** Source Type (Workflow), Source Code, Source Description, Source Table ID (5128007), Source Table Description (Workflow), Source Field ID (41), Source Field Description (Start Date), and Source Offset Date Calculation.
- Duration:** Duration Date Calculation (1D) and Critical Date Calculation.
- Recurring:** A section for recurring settings.
- Criteria:** Type (Field Examination), Condition Code (WF010-C010), and Condition Description (Check mandatory fields).

Two orange boxes highlight the "+" icon in the top navigation bar and the "WF010-C010" condition code in the Criteria section.

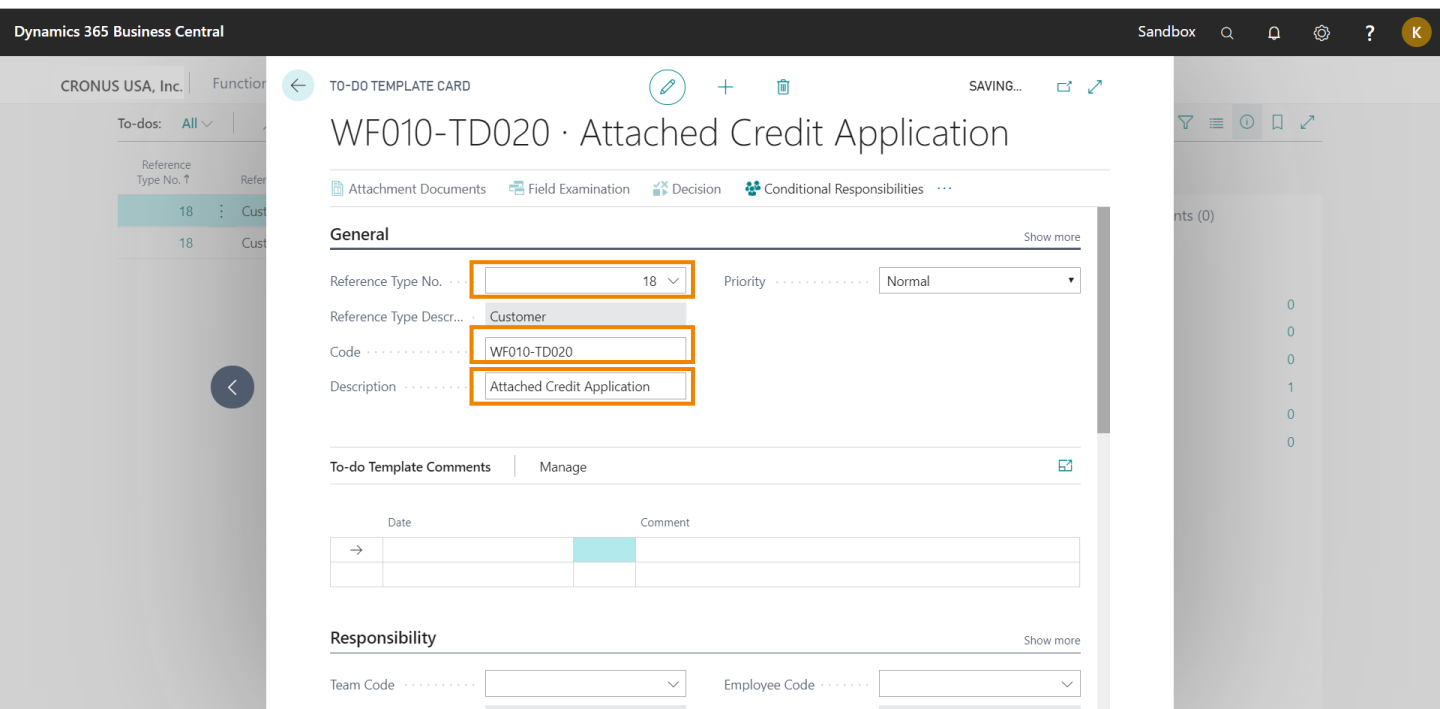
Scenario 1: New Customer – To-Do Template

1) General:

Enter Reference Type No. → 18

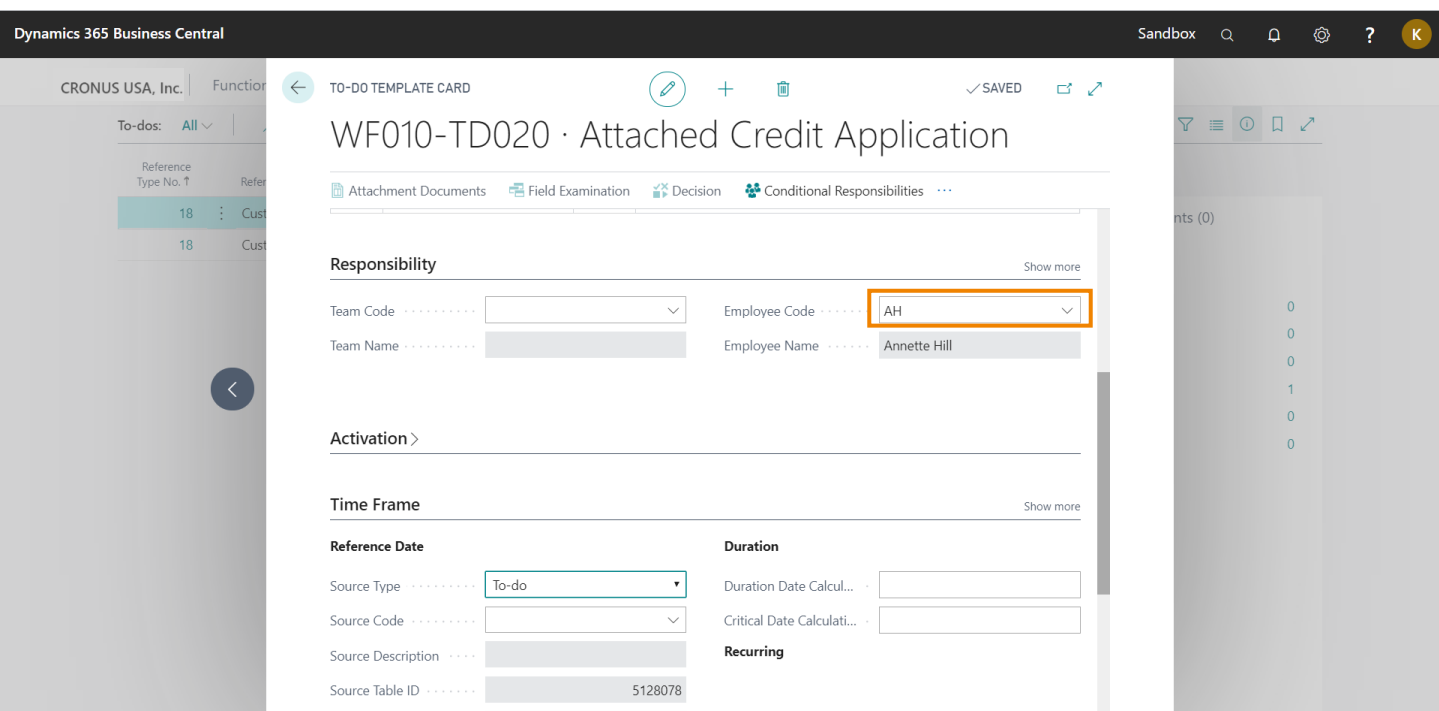
Enter Code → WF010-TD020

Enter Description → Attached Credit Application



Scenario 1: New Customer – To-Do Template

1) Responsibility: Enter Employee Code → AH



The screenshot displays the Dynamics 365 Business Central interface for a 'TO-DO TEMPLATE CARD'. The card title is 'WF010-TD020 · Attached Credit Application'. The 'Responsibility' section is expanded, showing the 'Employee Code' field with the value 'AH' selected and highlighted by an orange box. Other fields in the 'Responsibility' section include 'Team Code', 'Team Name', and 'Employee Name' (Annette Hill). The 'Time Frame' section is also visible, with 'Reference Date' set to 'To-do' and 'Source Table ID' as '5128078'. The interface includes standard navigation and utility icons at the top.

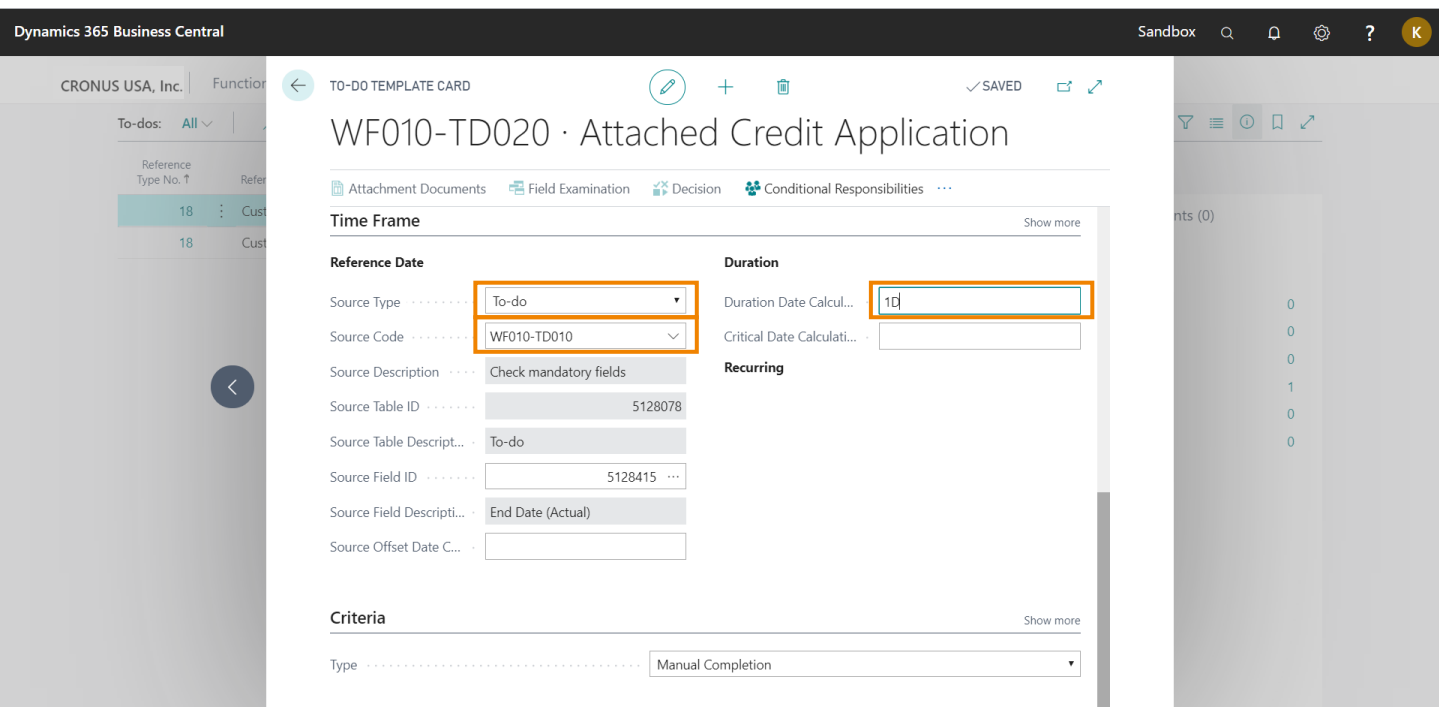
Scenario 1: New Customer – To-Do Template

1) Time Frame:

Enter Source Type → **To-do**

Enter Source Code → **WF010-TD010**

Enter Duration Date → **1D**



Dynamics 365 Business Central

CRONUS USA, Inc. | Function

TO-DO TEMPLATE CARD

WF010-TD020 · Attached Credit Application

Attachment Documents | Field Examination | Decision | Conditional Responsibilities

Time Frame Show more

Reference Date

Source Type To-do

Source Code WF010-TD010

Source Description Check mandatory fields

Source Table ID 5128078

Source Table Descript... To-do

Source Field ID 5128415 ...

Source Field Descripti... End Date (Actual)

Source Offset Date C...

Duration

Duration Date Calcul... 1D

Critical Date Calculati...

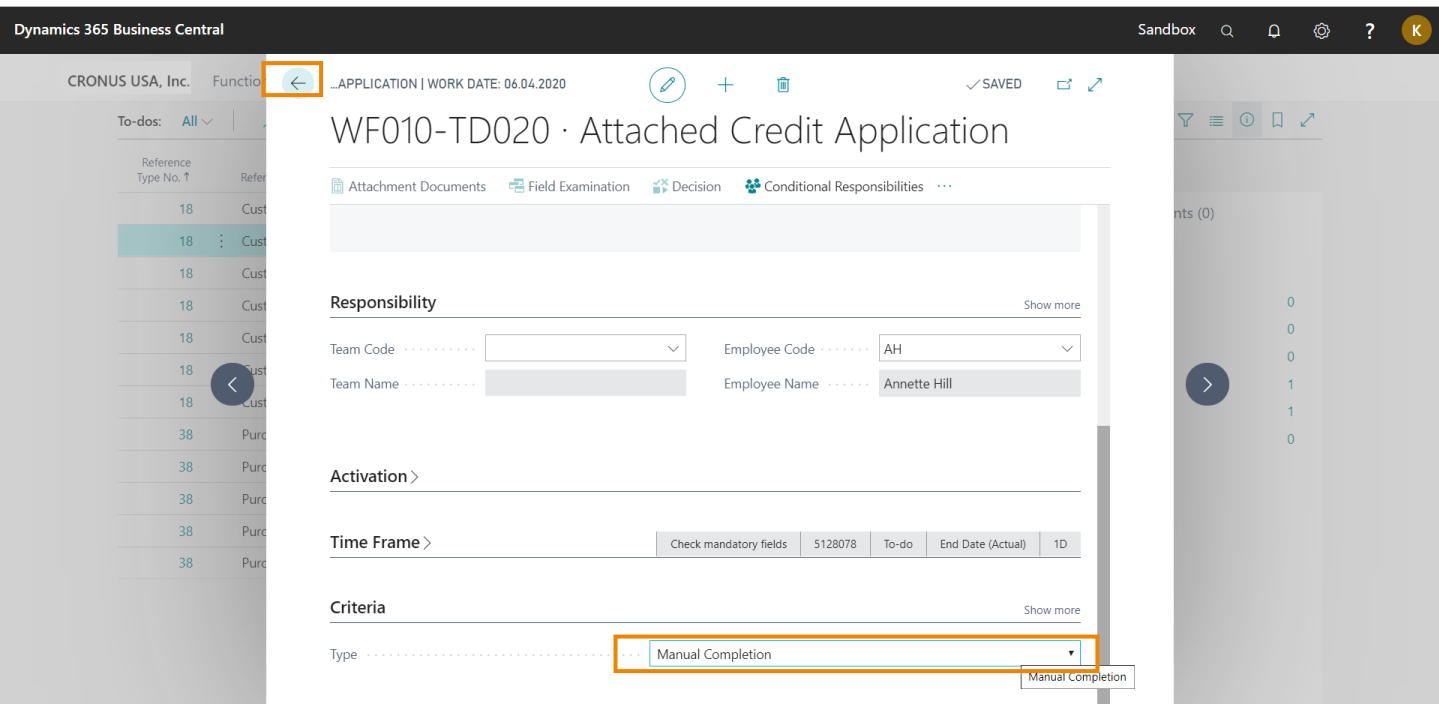
Recurring

Criteria Show more

Type Manual Completion

Scenario 1: New Customer – To-Do Template

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



Dynamics 365 Business Central

CRONUS USA, Inc. Function ...APPLICATION | WORK DATE: 06.04.2020

WF010-TD020 · Attached Credit Application

Attachment Documents Field Examination Decision Conditional Responsibilities ...

Responsibility Show more

Team Code Employee Code AH

Team Name Employee Name Annette Hill

Activation >

Time Frame > Check mandatory fields 5128078 To-do End Date (Actual) 1D

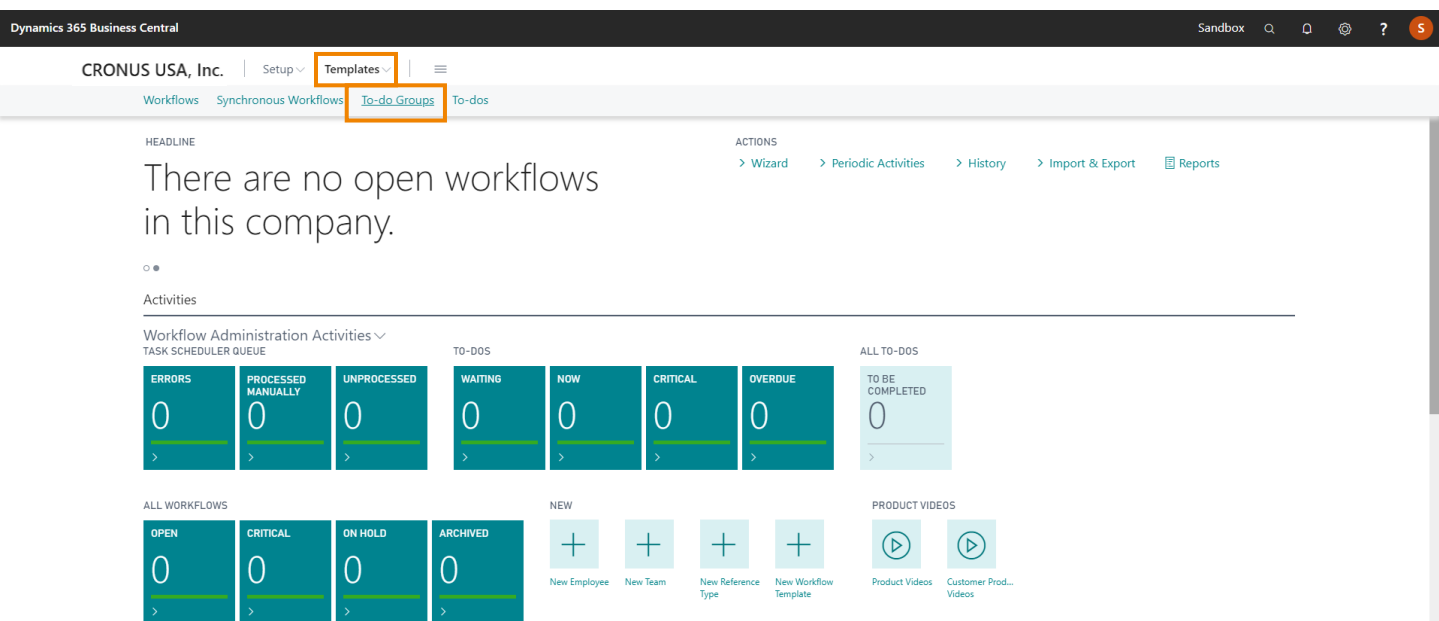
Criteria Show more

Type Manual Completion

Manual Completion

Scenario 1: New Customer – To-Do Group Template

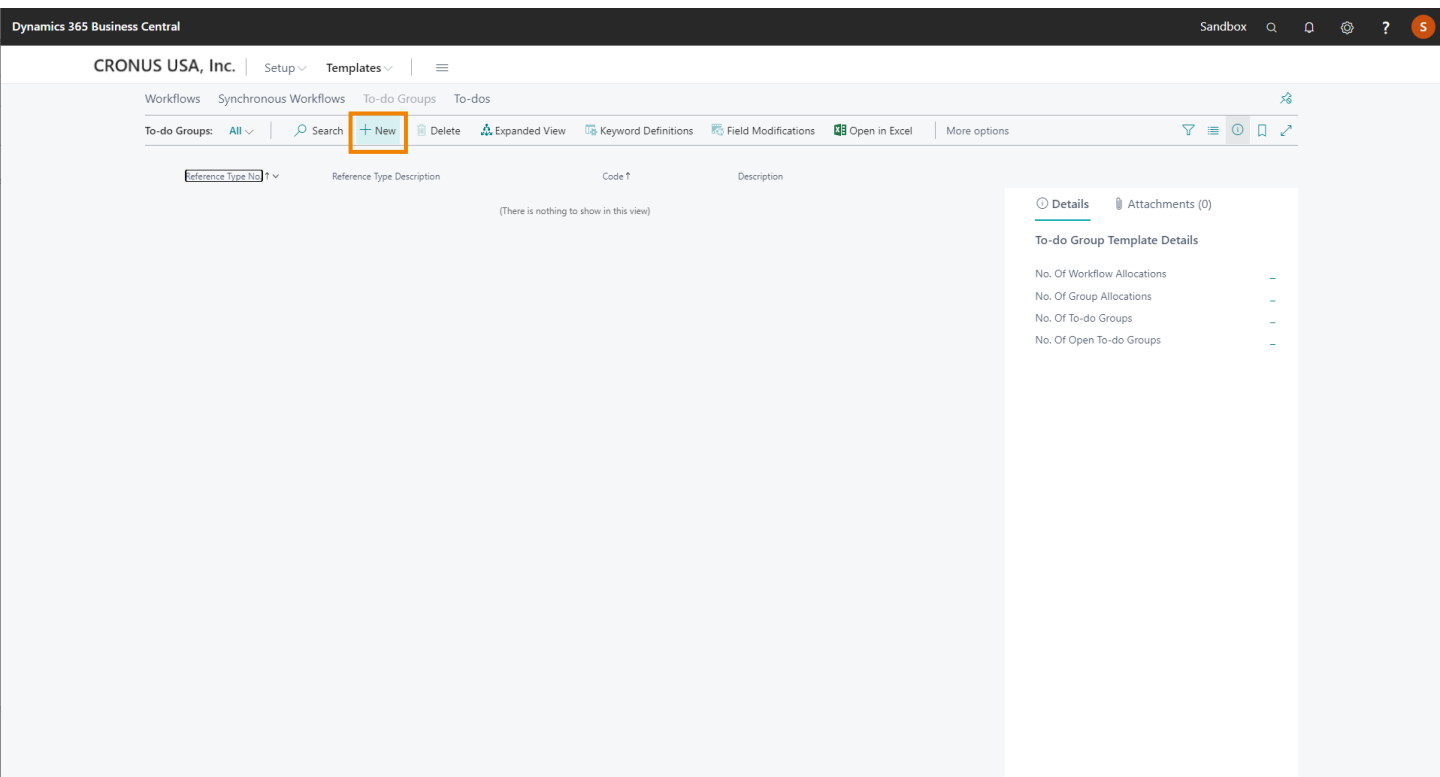
- 1) Click on **Templates**
- 2) Click on **To-do Groups**



The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The top navigation bar includes 'Setup', 'Templates', and a hamburger menu icon. Below the navigation bar, the 'To-do Groups' menu item is highlighted with an orange box. The main content area displays a headline: 'There are no open workflows in this company.' Below this, there are sections for 'Activities', 'Workflow Administration Activities', and 'TASK SCHEDULER QUEUE'. The 'TASK SCHEDULER QUEUE' section contains several cards for workflow statuses: ERRORS, PROCESSED MANUALLY, UNPROCESSED, WAITING, NOW, CRITICAL, and OVERDUE. The 'ALL TO-DOS' section shows a 'TO BE COMPLETED' card. The 'ALL WORKFLOWS' section includes cards for OPEN, CRITICAL, ON HOLD, and ARCHIVED. The 'NEW' section has buttons for 'New Employee', 'New Team', 'New Reference Type', and 'New Workflow Template'. The 'PRODUCT VIDEOS' section has buttons for 'Product Videos' and 'Customer Prod... Videos'.

Scenario 1: New Customer – To-Do Group Template

- 1) Click on **+New**



Scenario 1: New Customer – To-Do Group Template

1) General:

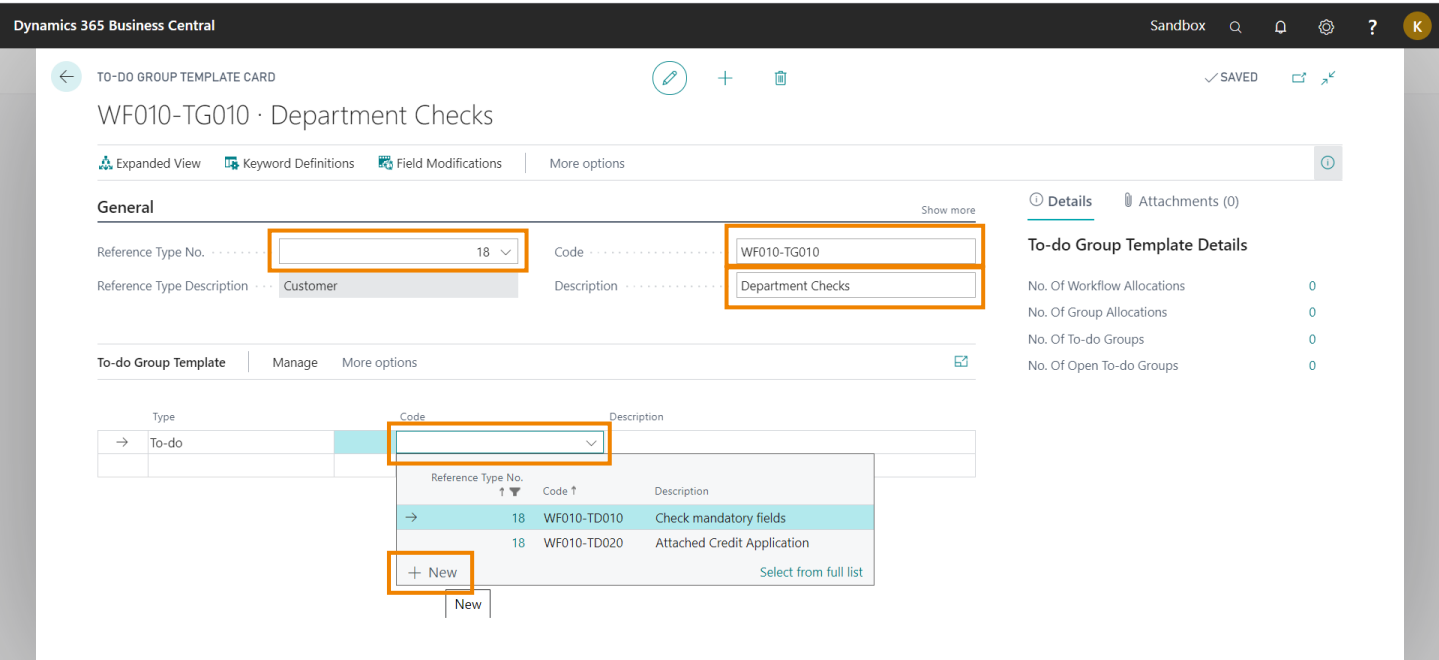
Enter Reference Type No. → 18

Enter Code → WF010-TG010

Enter Description → Department Checks

2) Use look up value in field Code

3) Click on +New



Dynamics 365 Business Central

Sandbox

TO-DO GROUP TEMPLATE CARD

WF010-TG010 · Department Checks

Expanded View | Keyword Definitions | Field Modifications | More options

General Show more

Reference Type No. 18 Code WF010-TG010

Reference Type Description Customer Description Department Checks

To-do Group Template | Manage | More options

Type Code Description

Type	Code	Description
→ To-do		

Reference Type No. Code Description

→ 18	WF010-TD010	Check mandatory fields
18	WF010-TD020	Attached Credit Application

+ New Select from full list

Details | Attachments (0)

To-do Group Template Details

No. Of Workflow Allocations	0
No. Of Group Allocations	0
No. Of To-do Groups	0
No. Of Open To-do Groups	0

Scenario 1: New Customer – To-Do Group Template

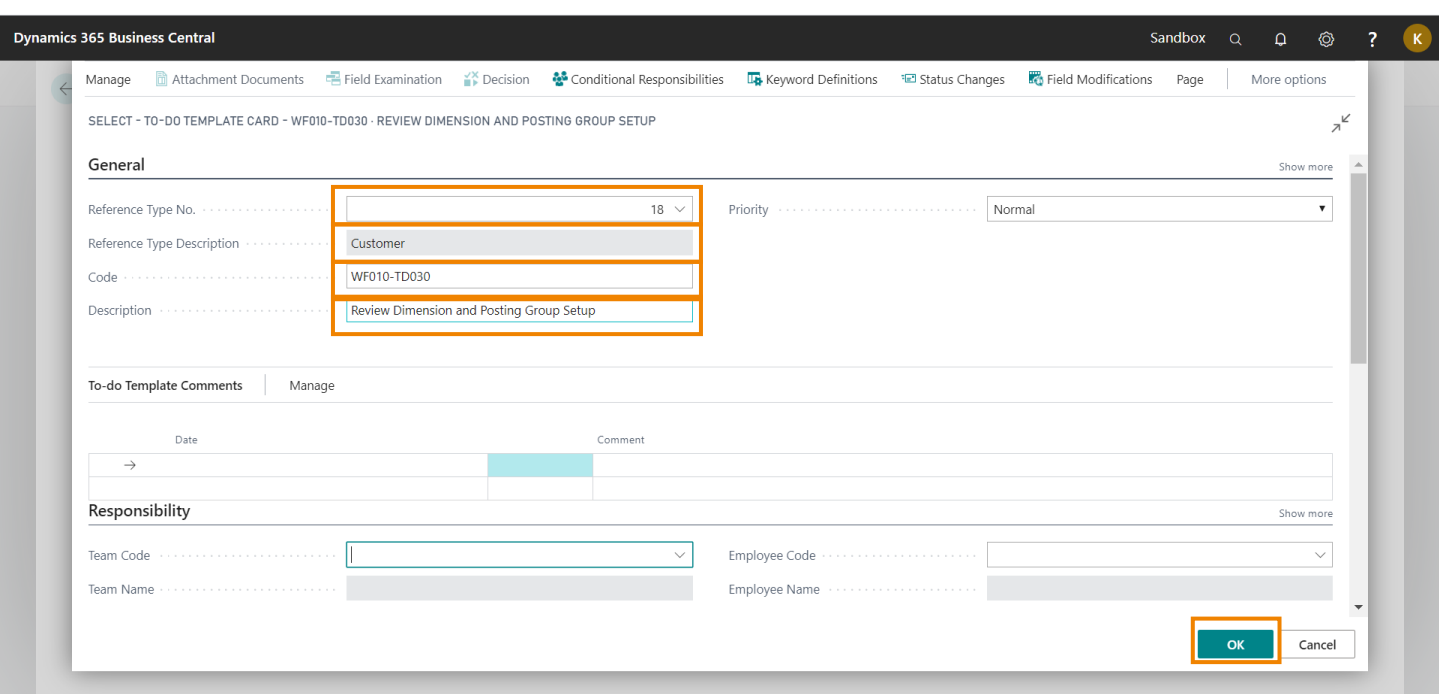
1) General:

Enter Reference Type No. → 18

Enter Reference Type Description → Customer

Enter Code → WF010-TD030

Enter Description → Review Dimension and Posting Group Setup



Dynamics 365 Business Central

Sandbox

Manage Attachment Documents Field Examination Decision Conditional Responsibilities Keyword Definitions Status Changes Field Modifications Page More options

SELECT - TO-DO TEMPLATE CARD - WF010-TD030 - REVIEW DIMENSION AND POSTING GROUP SETUP

General Show more

Reference Type No. 18 Priority Normal

Reference Type Description Customer

Code WF010-TD030

Description Review Dimension and Posting Group Setup

To-do Template Comments Manage

Date	Comment
→	

Responsibility Show more

Team Code Employee Code

Team Name Employee Name

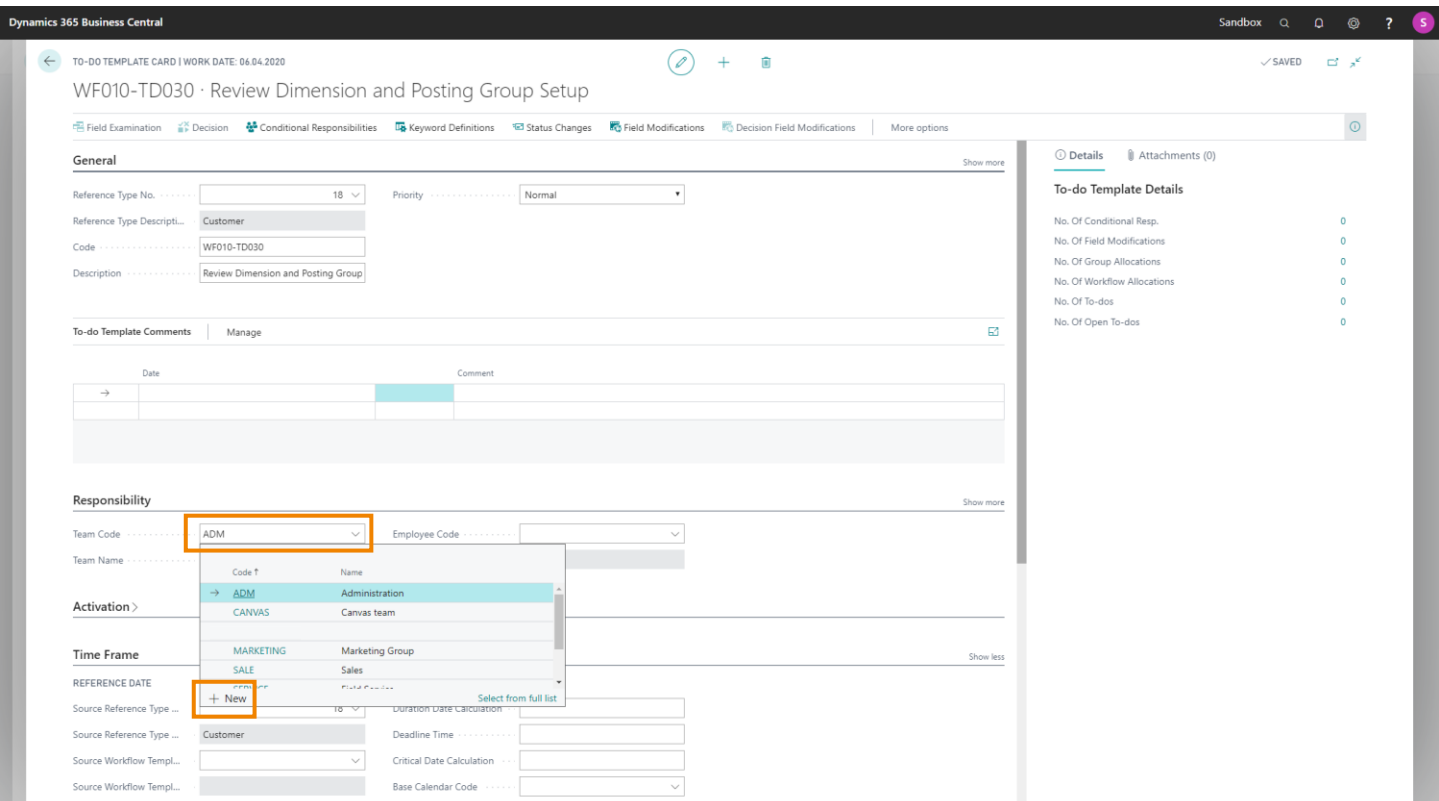
OK Cancel

Scenario 1: New Customer – To-Do Group Template

1) Responsibility:

Click in field **Team Code**

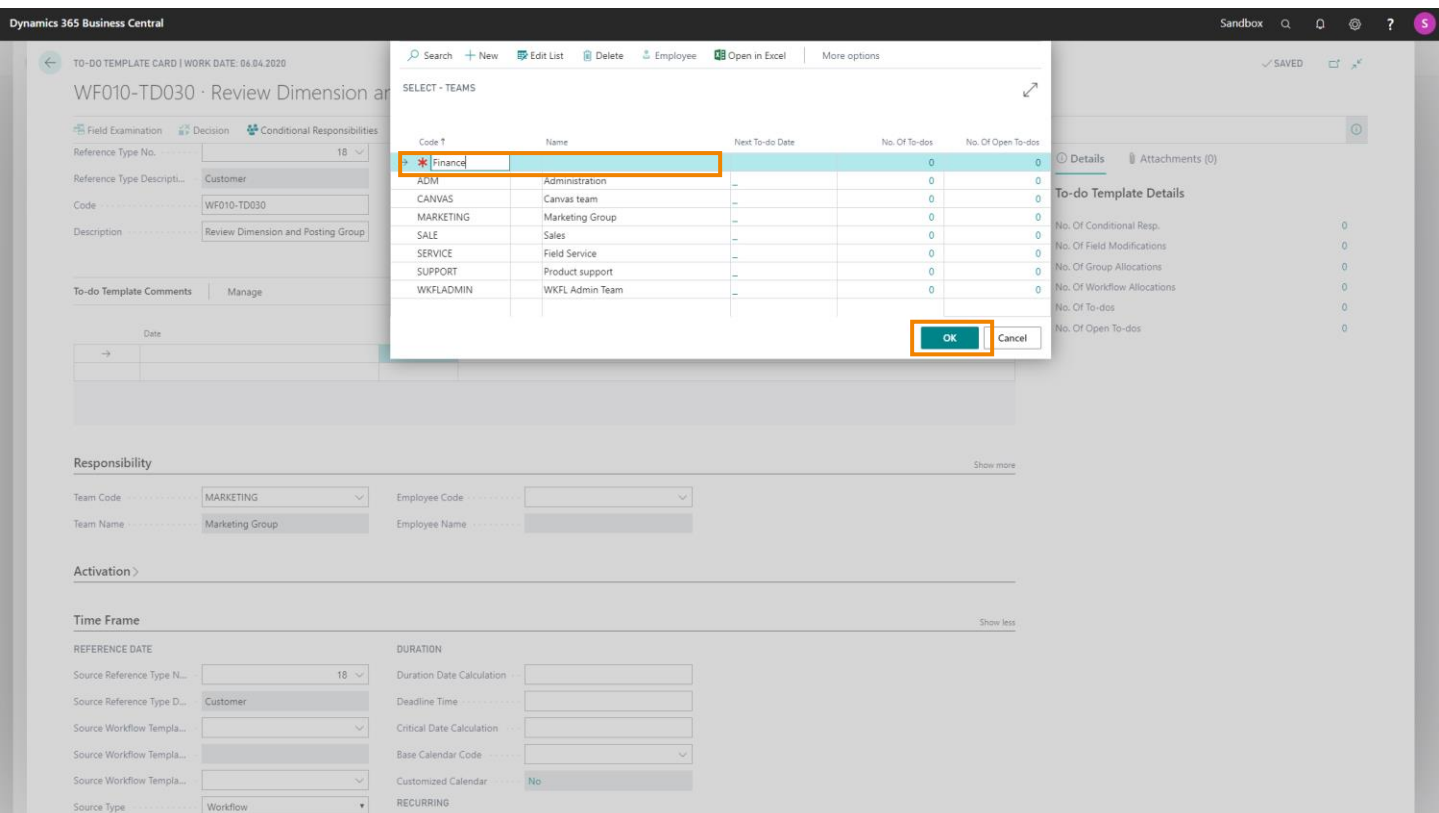
Click on **+New**



The screenshot shows the Dynamics 365 Business Central interface for a 'TO-DO TEMPLATE CARD'. The card is titled 'WF010-TD030 · Review Dimension and Posting Group Setup'. The 'Responsibility' section is highlighted, showing the 'Team Code' field set to 'ADM'. A dropdown menu is open, listing various teams: 'ADM Administration', 'CANVAS Canvas team', and 'MARKETING Marketing Group'. The '+ New' option is highlighted in the dropdown. The 'Activation' section is also visible, showing the 'REFERENCE DATE' field set to '18' and the '+ New' option highlighted. The 'To-do Template Details' sidebar on the right shows various statistics, all with a value of 0.

Scenario 1: New Customer – To-Do Group Template

- 1) Create new Team Finance:
- 2) Enter Code: **Finance**
- 3) Enter Name: **Finance**
- 4) Click **OK**

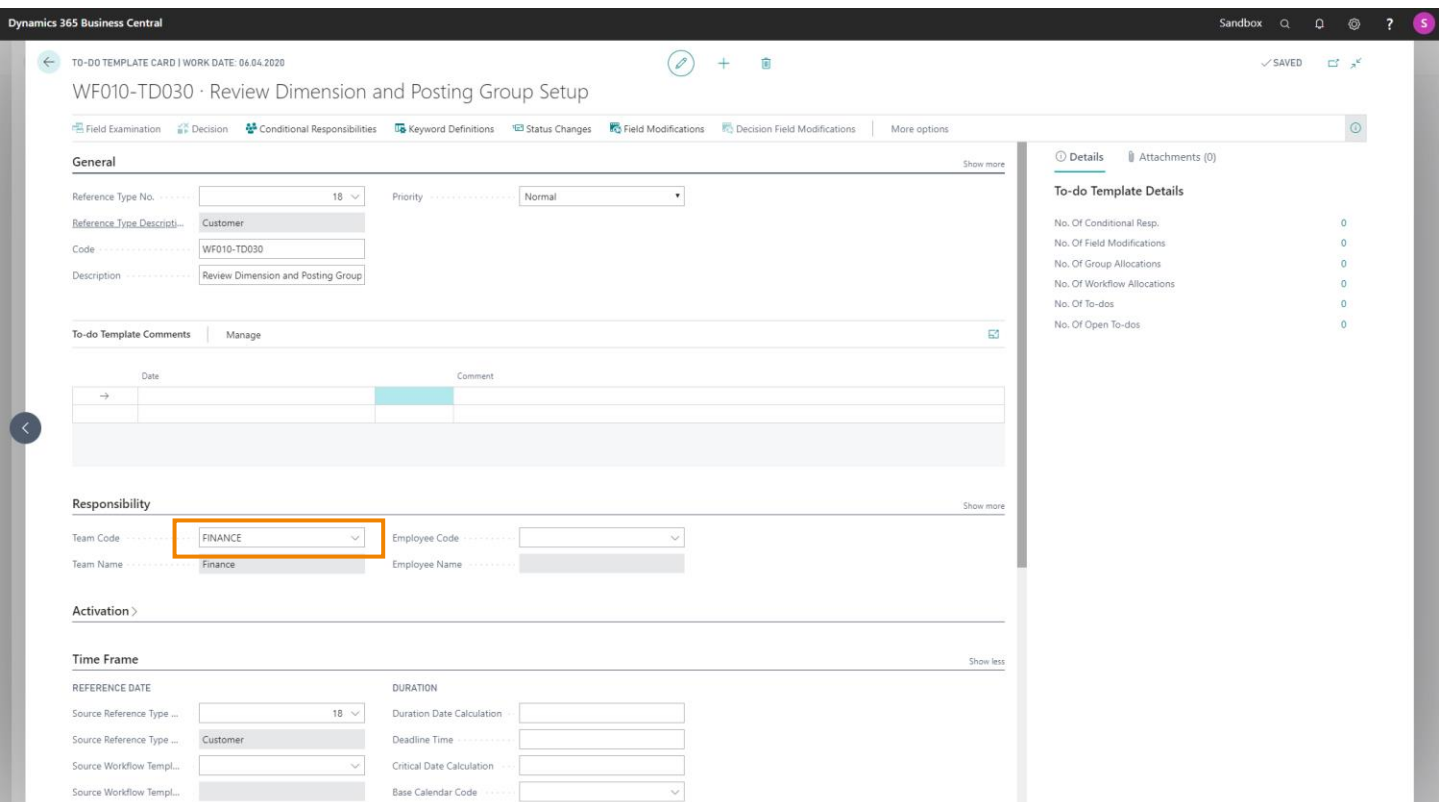


The screenshot shows the Dynamics 365 Business Central interface. A 'SELECT - TEAMS' dialog box is open, displaying a table of teams. The 'Finance' team is selected, and the 'OK' button is highlighted. The background shows the 'TO-DO TEMPLATE CARD' for 'WF010-TD030' with various fields and sections.

Code	Name	Next To-do Date	No. Of To-dos	No. Of Open To-dos
* Finance	Finance		0	0
ADM	Administration	--	0	0
CANVAS	Canvas team	--	0	0
MARKETING	Marketing Group	--	0	0
SALE	Sales	--	0	0
SERVICE	Field Service	--	0	0
SUPPORT	Product support	--	0	0
WKFLADMIN	WKFL Admin Team	--	0	0

Scenario 1: New Customer – To-Do Group Template

1) Responsibility: Finance Team is entered



The screenshot displays the 'TO-DO TEMPLATE CARD' for 'WF010-TD030' in Dynamics 365 Business Central. The 'General' section includes fields for Reference Type No. (18), Priority (Normal), Reference Type Description (Customer), Code (WF010-TD030), and Description (Review Dimension and Posting Group). The 'To-do Template Comments' section has a 'Manage' button. The 'Responsibility' section shows 'Team Code' set to 'FINANCE' (highlighted with an orange box), 'Employee Code', 'Team Name' (Finance), and 'Employee Name'. The 'Activation' and 'Time Frame' sections are also visible.

Scenario 1: New Customer – To-Do Group Template

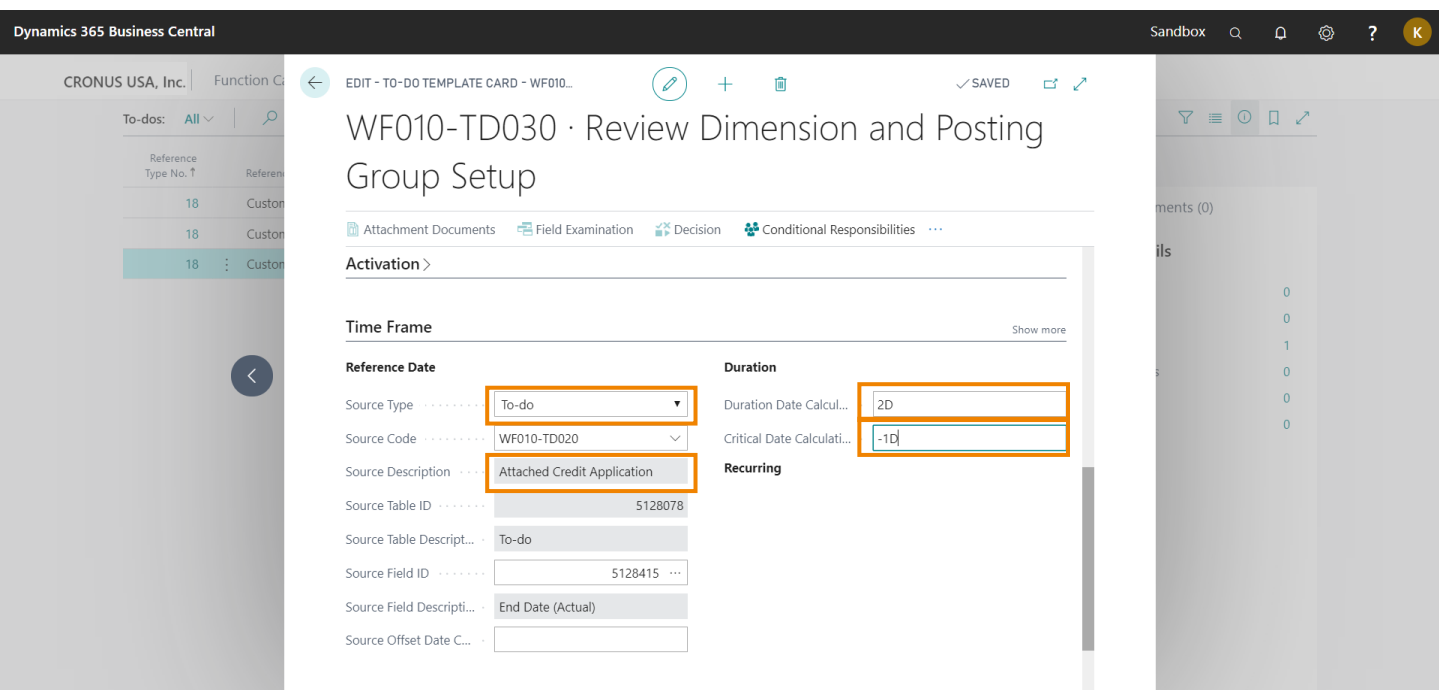
1) Time Frame:

Use look up value in field Source Type and select **To-do**

Enter Source Description → **Attached Credit Application**

Enter Duration Date Calculation → **2D**

Enter Critical Date Calculation → **-1D**

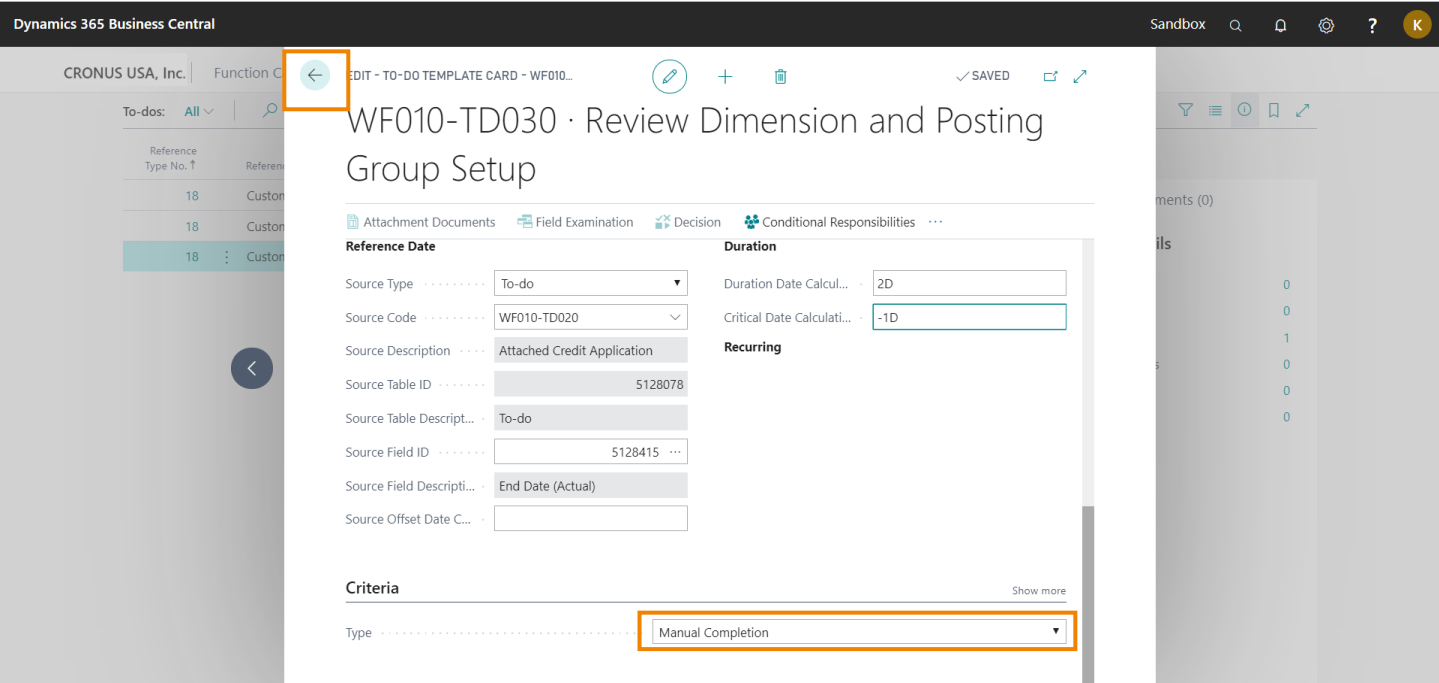


The screenshot displays the Dynamics 365 Business Central interface for editing a 'TO-DO TEMPLATE CARD'. The main title is 'WF010-TD030 · Review Dimension and Posting Group Setup'. The 'Time Frame' section is expanded, showing the following configuration:

- Reference Date:**
 - Source Type: To-do
 - Source Code: WF010-TD020
 - Source Description: Attached Credit Application
 - Source Table ID: 5128078
 - Source Table Description: To-do
 - Source Field ID: 5128415
 - Source Field Description: End Date (Actual)
 - Source Offset Date Calculation: (empty)
- Duration:**
 - Duration Date Calculation: 2D
 - Critical Date Calculation: -1D
- Recurring:** (empty)

Scenario 1: New Customer – To-Do Group Template

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



The screenshot displays the Dynamics 365 Business Central interface for setting up a To-Do group template. The main title is "WF010-TD030 · Review Dimension and Posting Group Setup". The form is divided into several sections:

- Reference Date:** Source Type (To-do), Source Code (WF010-TD020), Source Description (Attached Credit Application), Source Table ID (5128078), Source Table Description (To-do), Source Field ID (5128415), Source Field Description (End Date (Actual)), and Source Offset Date Calculation.
- Duration:** Duration Date Calculation (2D) and Critical Date Calculation (-1D).
- Recurring:** A section for configuring recurring tasks.
- Criteria:** A section with a "Type" dropdown menu set to "Manual Completion".

Navigation elements include a back arrow in the top left corner and a "Show more" link at the bottom right of the Criteria section.

Scenario 1: New Customer – To-Do Group Template

- 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

Dynamics 365 Business Central

TO-DO GROUP TEMPLATE CARD | WORK DATE: 06.04.2020

WF010-TG010 · Department Checks

Expanded View | Keyword Definitions | Field Modifications | Actions | Navigate | Fewer options

General Show more

Reference Type No. 18 Code WF010-TG010
 Reference Type Description Customer Description Department Checks

To-do Group Template | Manage | More options

Type	Code	Description
→ To-do	WF010-TD030	Review Dimension and Posting Group Setup

Reference Type No.	Code T	Description
18	WF010-TD010	Check mandatory fields
18	WF010-TD030	Review Dimension and Posting Group Setup

+ New Select from full list

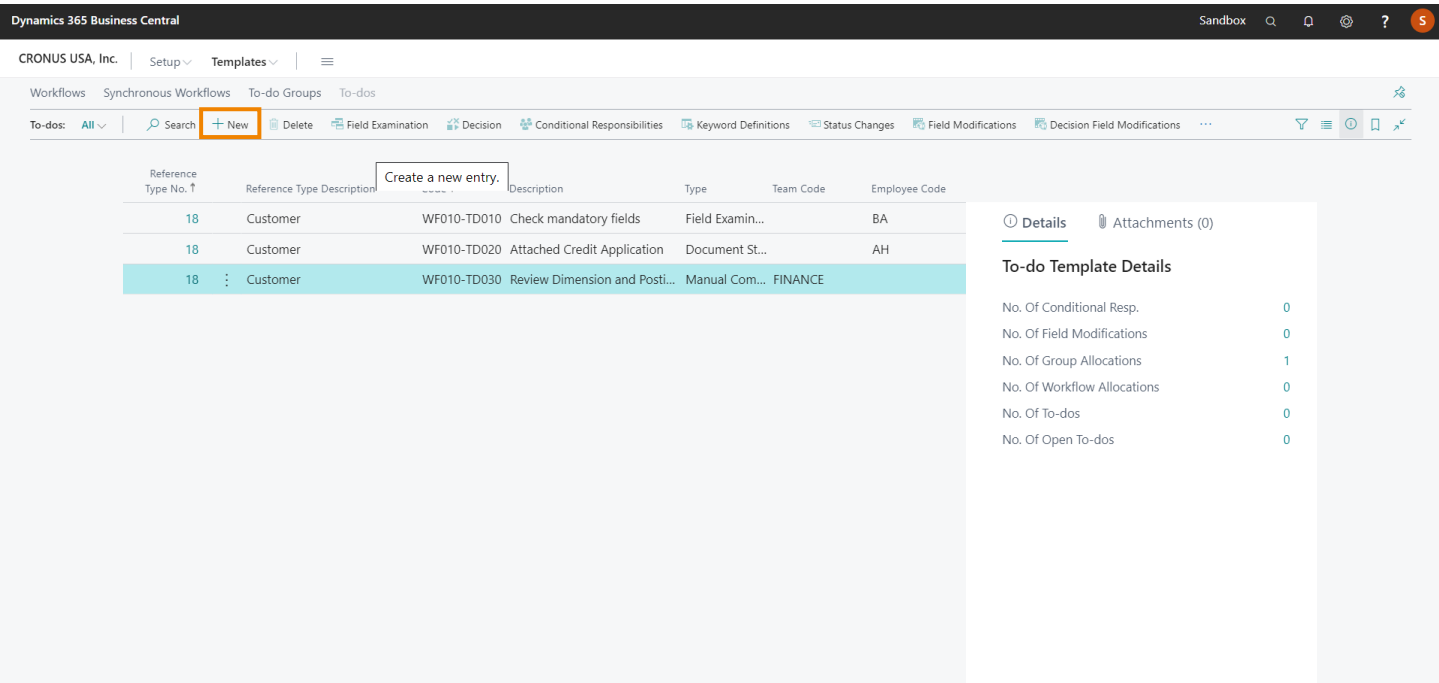
Details | Attachments (0)

To-do Group Template Details

- No. Of Workflow Allocations 0
- No. Of Group Allocations 0
- No. Of To-do Groups 0
- No. Of Open To-do Groups 0

Scenario 1: New Customer – To-Do Group Template

1) Click on **+New**



The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.' in the 'Sandbox' environment. The navigation pane on the left includes 'Workflows', 'Synchronous Workflows', 'To-do Groups', and 'To-dos'. The 'To-do Groups' table is displayed with the following data:

Reference Type No. ↑	Reference Type	Description	Type	Team Code	Employee Code
18	Customer	WF010-TD010 Check mandatory fields	Field Examin...		BA
18	Customer	WF010-TD020 Attached Credit Application	Document St...		AH
18	Customer	WF010-TD030 Review Dimension and Posti...	Manual Com...	FINANCE	

The '+ New' button in the table's command bar is highlighted with an orange box. A tooltip 'Create a new entry.' is visible over the table. On the right, the 'To-do Template Details' panel shows the following statistics:

- No. Of Conditional Resp. 0
- No. Of Field Modifications 0
- No. Of Group Allocations 1
- No. Of Workflow Allocations 0
- No. Of To-dos 0
- No. Of Open To-dos 0

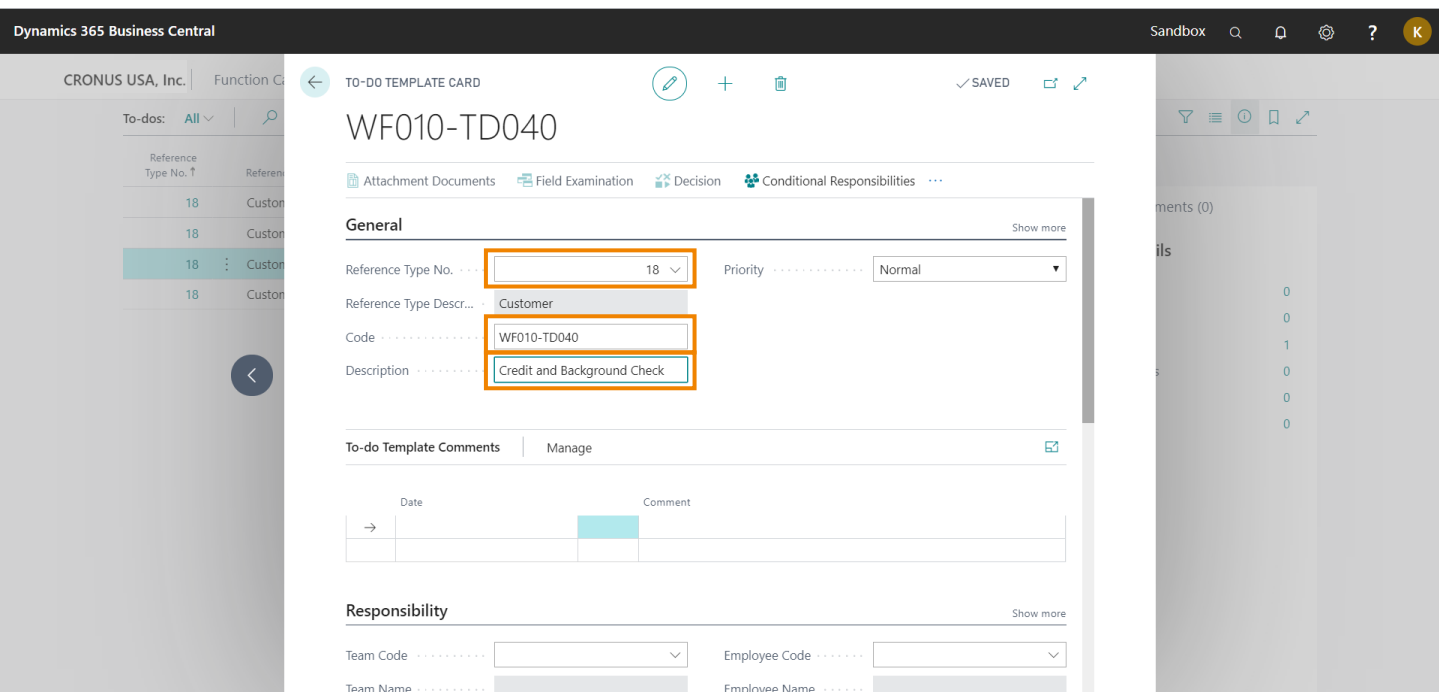
Scenario 1: New Customer – To-Do Group Template

1) General:

Enter Reference Type No. → 18

Enter Code → WF010-TD040

Enter Description → Credit and Background Check



Dynamics 365 Business Central

CRONUS USA, Inc. | Function C

To-dos: All | Search

Reference Type No. ↑ | Referen

18 | Custom

18 | Custom

18 | Custom

18 | Custom

←

TO-DO TEMPLATE CARD

WF010-TD040

Attachment Documents | Field Examination | Decision | Conditional Responsibilities ...

General

Reference Type No. ... 18 | Priority ... Normal

Reference Type Descr... Customer

Code ... WF010-TD040

Description ... Credit and Background Check

To-do Template Comments | Manage

Date | Comment

→

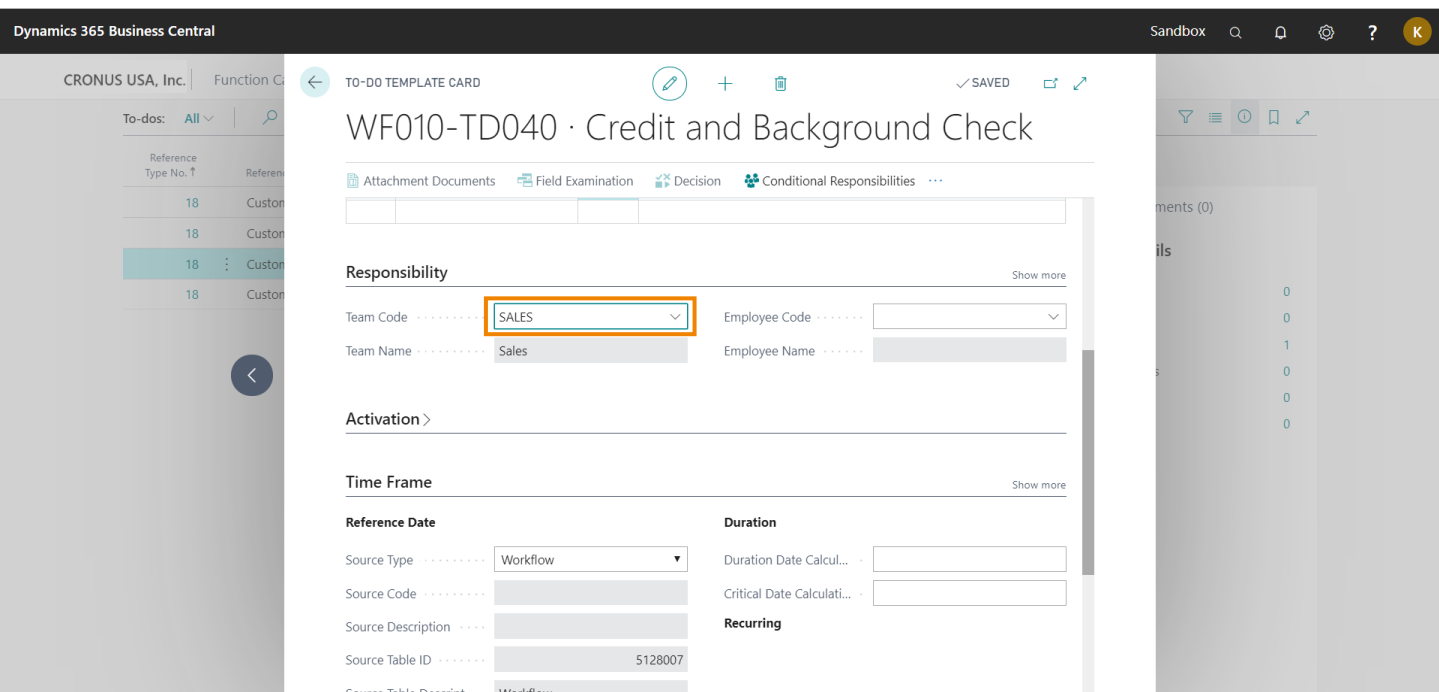
Responsibility

Team Code ... | Employee Code ...

Team Name ... | Employee Name ...

Scenario 1: New Customer – To-Do Group Template

- 1) **Responsibility:** Enter Team Code → Sales
- 2) Enter a new Team Sales



Dynamics 365 Business Central

CRONUS USA, Inc. | Function C

TO-DO TEMPLATE CARD

WF010-TD040 · Credit and Background Check

Attachment Documents | Field Examination | Decision | Conditional Responsibilities

Responsibility Show more

Team Code SALES Employee Code
Team Name Sales Employee Name

Activation >

Time Frame Show more

Reference Date **Duration**

Source Type Workflow Duration Date Calcul...
Source Code Critical Date Calculati...
Source Description
Source Table ID 5128007 **Recurring**
Source Table Descript Workflow

Scenario 1: New Customer – To-Do Group Template

1) Time Frame:

Use look up value in field Source Type and select **To-do**

Select Source Code **WF010-TD020**

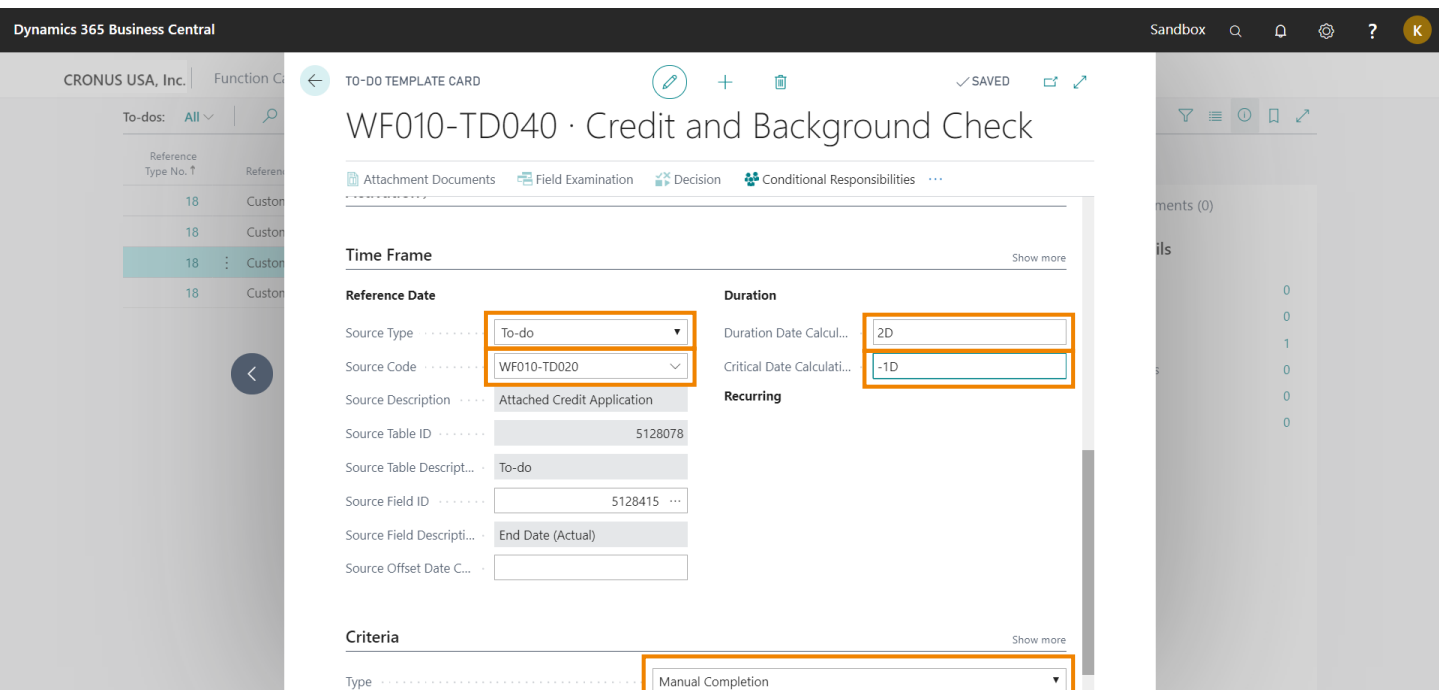
Enter Duration Date Calculation → **2D**

Enter Critical Date Calculation → **-1D**

2) Criteria:

Use look up value in field Type and select **Manual Completion**

3) Close Page



The screenshot displays the 'TO-DO TEMPLATE CARD' in Dynamics 365 Business Central. The card title is 'WF010-TD040 · Credit and Background Check'. The 'Time Frame' section is expanded, showing the following fields:

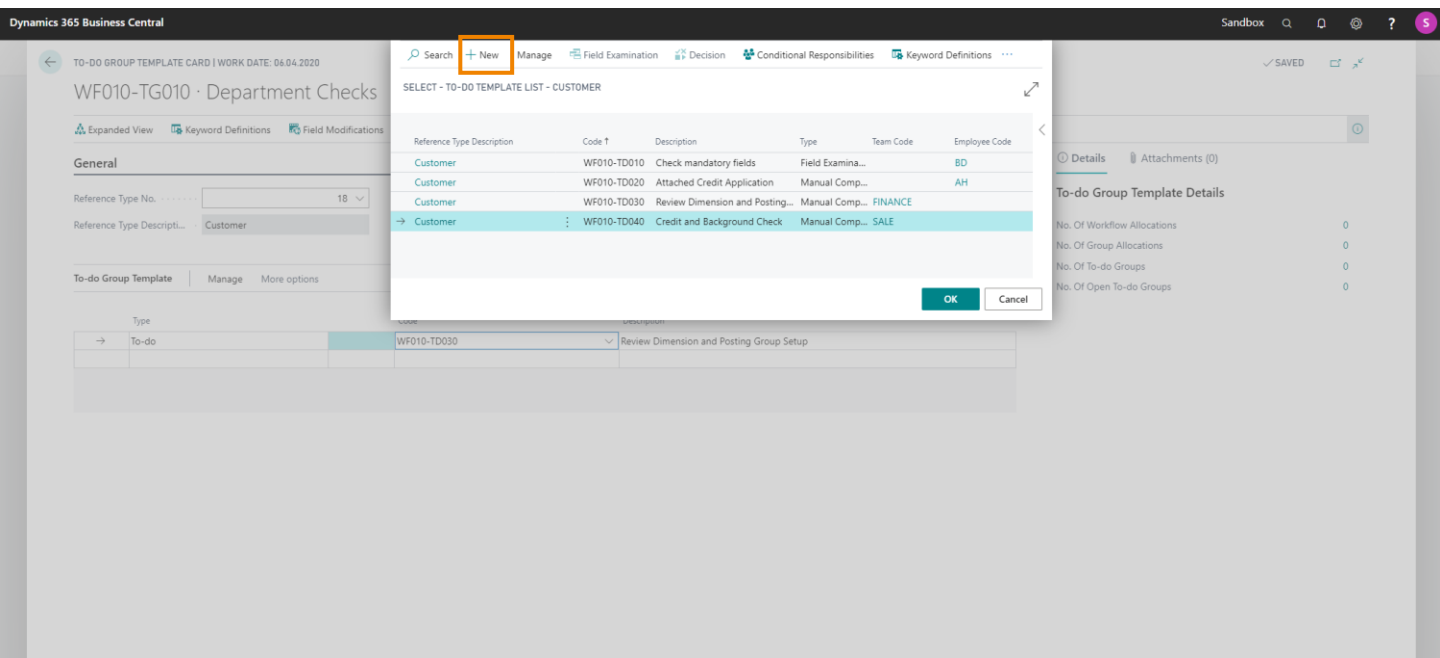
- Reference Date:** Source Type (To-do), Source Code (WF010-TD020), Source Description (Attached Credit Application), Source Table ID (5128078), Source Table Description (To-do), Source Field ID (5128415), Source Field Description (End Date (Actual)), Source Offset Date Calculation.
- Duration:** Duration Date Calculation (2D), Critical Date Calculation (-1D).
- Recurring:** (No values are visible).

The 'Criteria' section is also expanded, showing the following field:

- Criteria:** Type (Manual Completion).

Scenario 1: New Customer – To-Do Group Template

- 1) Click on **+New**



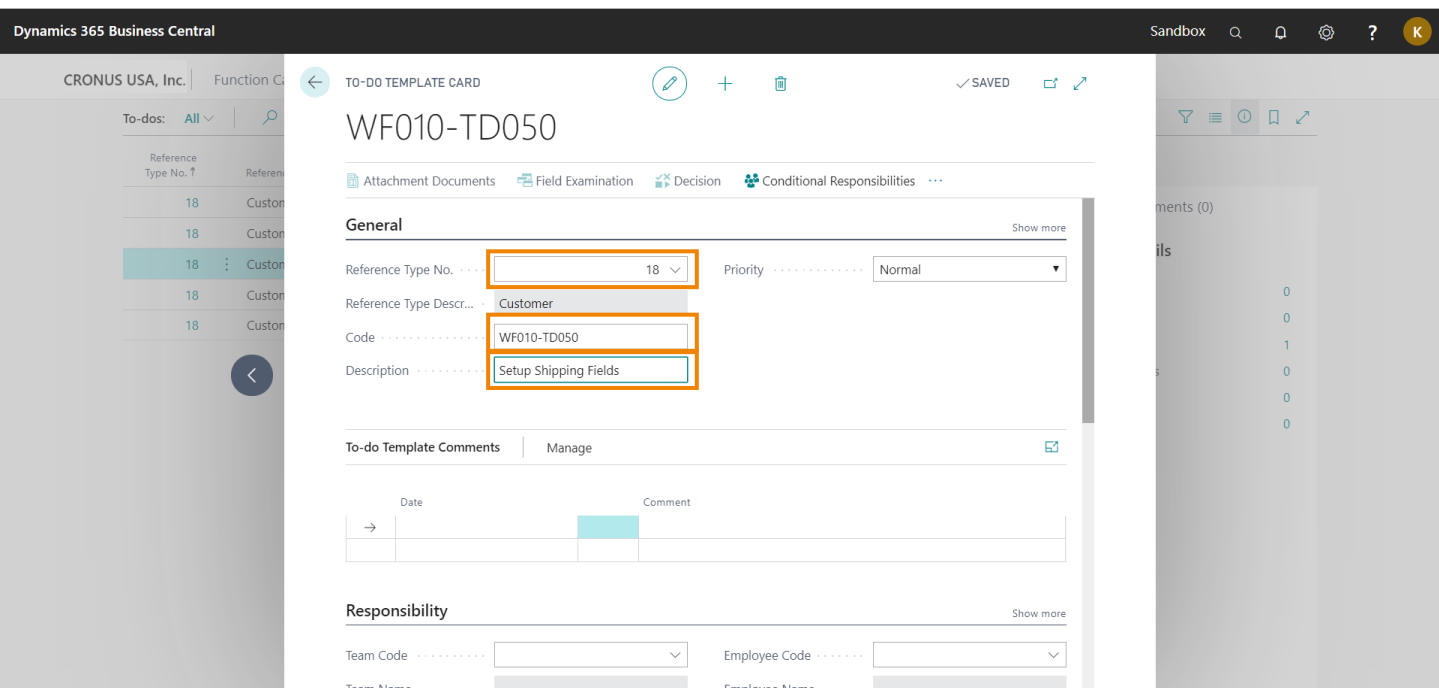
Scenario 1: New Customer – To-Do Group Template

1) General:

Enter Reference Type No. → 18

Enter Code → WF010-TD050

Enter Description → Setup Shipping Fields



Dynamics 365 Business Central

CRONUS USA, Inc. | Function C

TO-DO TEMPLATE CARD

WF010-TD050

Attachment Documents | Field Examination | Decision | Conditional Responsibilities

General Show more

Reference Type No. ... 18 Priority ... Normal

Reference Type Desc... Customer

Code ... WF010-TD050

Description ... Setup Shipping Fields

To-do Template Comments | Manage

Date	Comment
→	

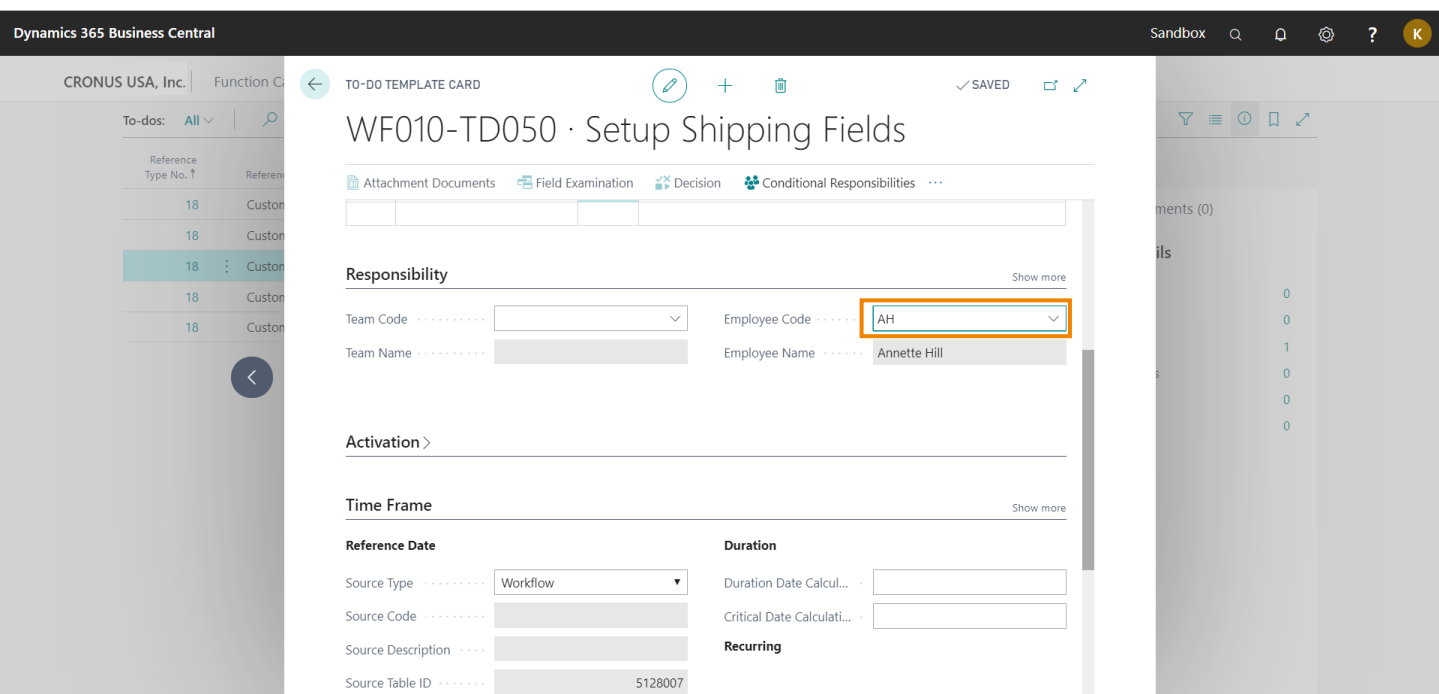
Responsibility Show more

Team Code ... Employee Code ...

Team Name ... Employee Name ...

Scenario 1: New Customer – To-Do Group Template

1) Responsibility: Enter Employee Code → AH



The screenshot displays the Dynamics 365 Business Central interface for a 'TO-DO TEMPLATE CARD'. The card title is 'WF010-TD050 · Setup Shipping Fields'. The 'Responsibility' section is expanded, showing the following fields:

- Team Code: [Dropdown]
- Employee Code: AH (highlighted with an orange box)
- Team Name: [Text]
- Employee Name: Annette Hill

Below the 'Responsibility' section, the 'Activation' and 'Time Frame' sections are visible. The 'Time Frame' section includes:

- Reference Date: Source Type (Workflow), Source Code, Source Description, Source Table ID (5128007)
- Duration: Duration Date Calcul..., Critical Date Calculati...
- Recurring: [Section]

Scenario 1: New Customer – To-Do Group Template

1) Time Frame:

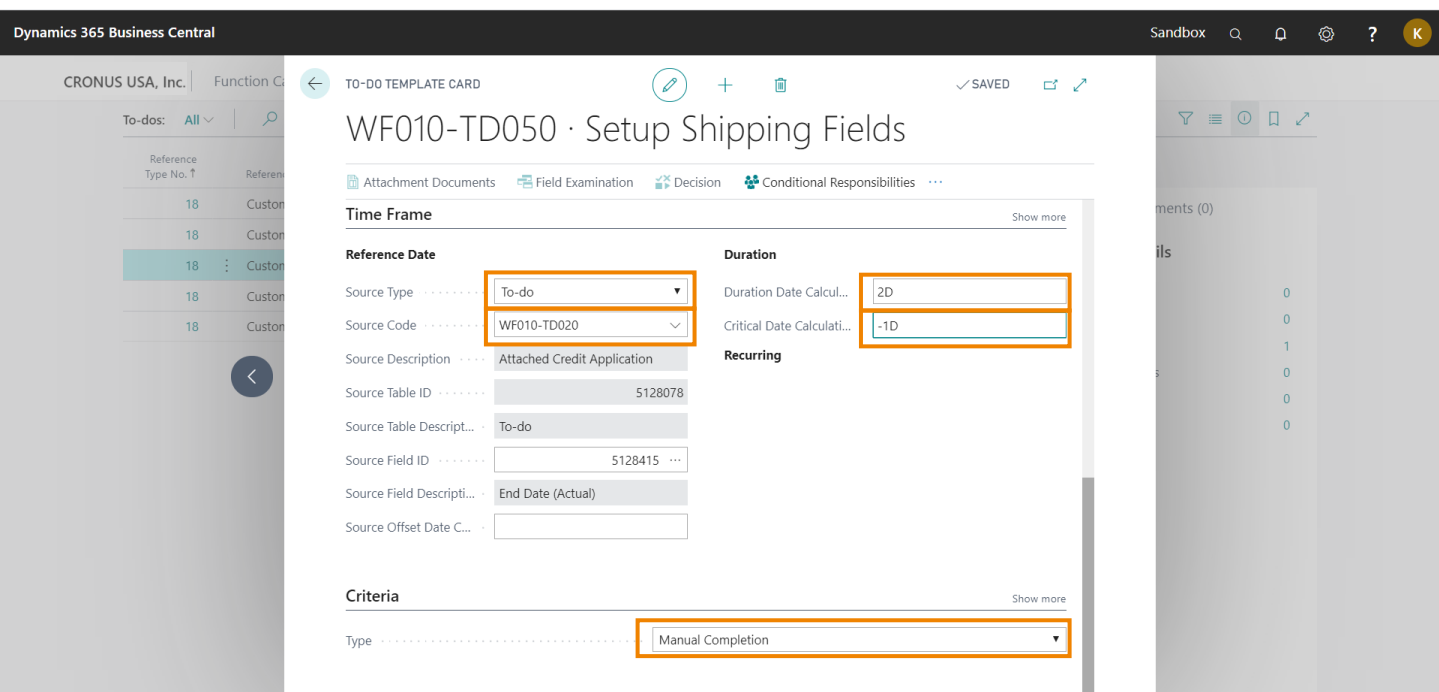
Use look up Source Type → **To-do**

Enter Source Code → **WF010-TD020**

Enter Duration Date Calculation → **2D**

Enter Critical Date Calculation → **-1D**

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

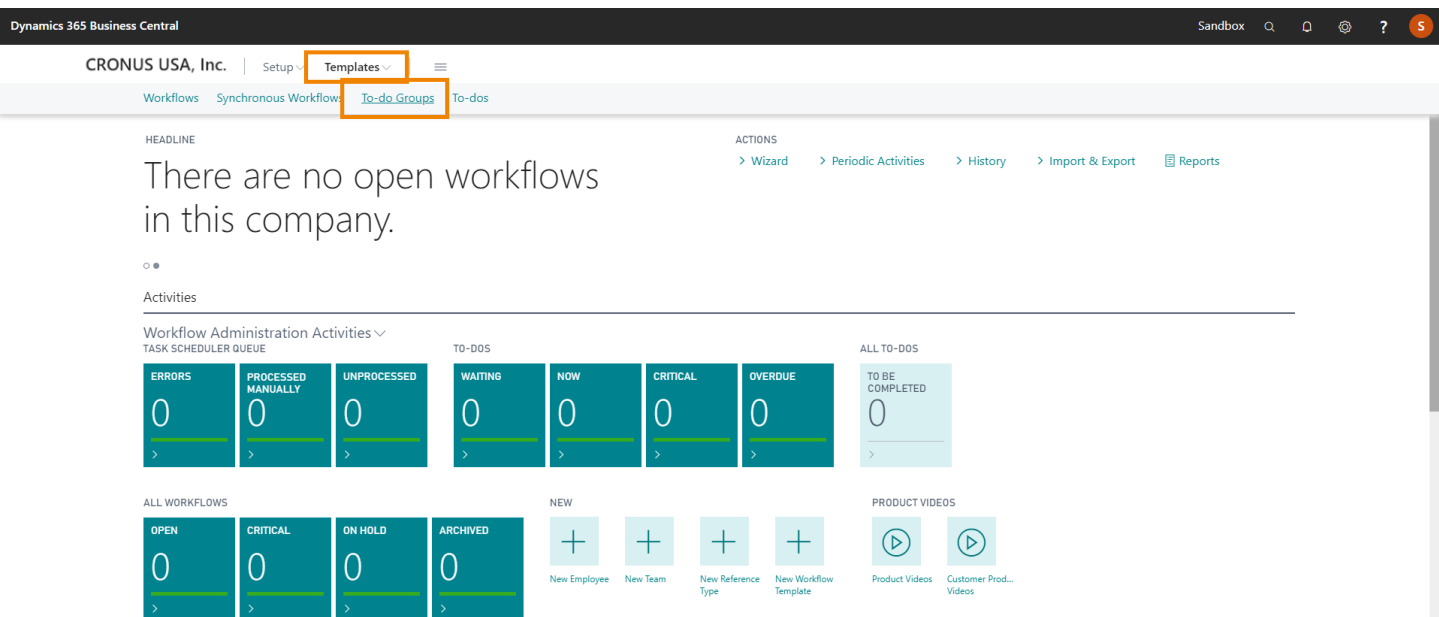


The screenshot displays the Dynamics 365 Business Central interface for configuring a 'To-Do Group Template'. The main window is titled 'WF010-TD050 · Setup Shipping Fields'. The 'Time Frame' section is expanded, showing the following fields:

- Reference Date:**
 - Source Type: To-do
 - Source Code: WF010-TD020
 - Source Description: Attached Credit Application
 - Source Table ID: 5128078
 - Source Table Description: To-do
 - Source Field ID: 5128415
 - Source Field Description: End Date (Actual)
 - Source Offset Date Calculation: (empty)
- Duration:**
 - Duration Date Calculation: 2D
 - Critical Date Calculation: -1D
- Recurring:** (empty)
- Criteria:**
 - Type: Manual Completion

Scenario 1: New Customer – To-Do Group Template

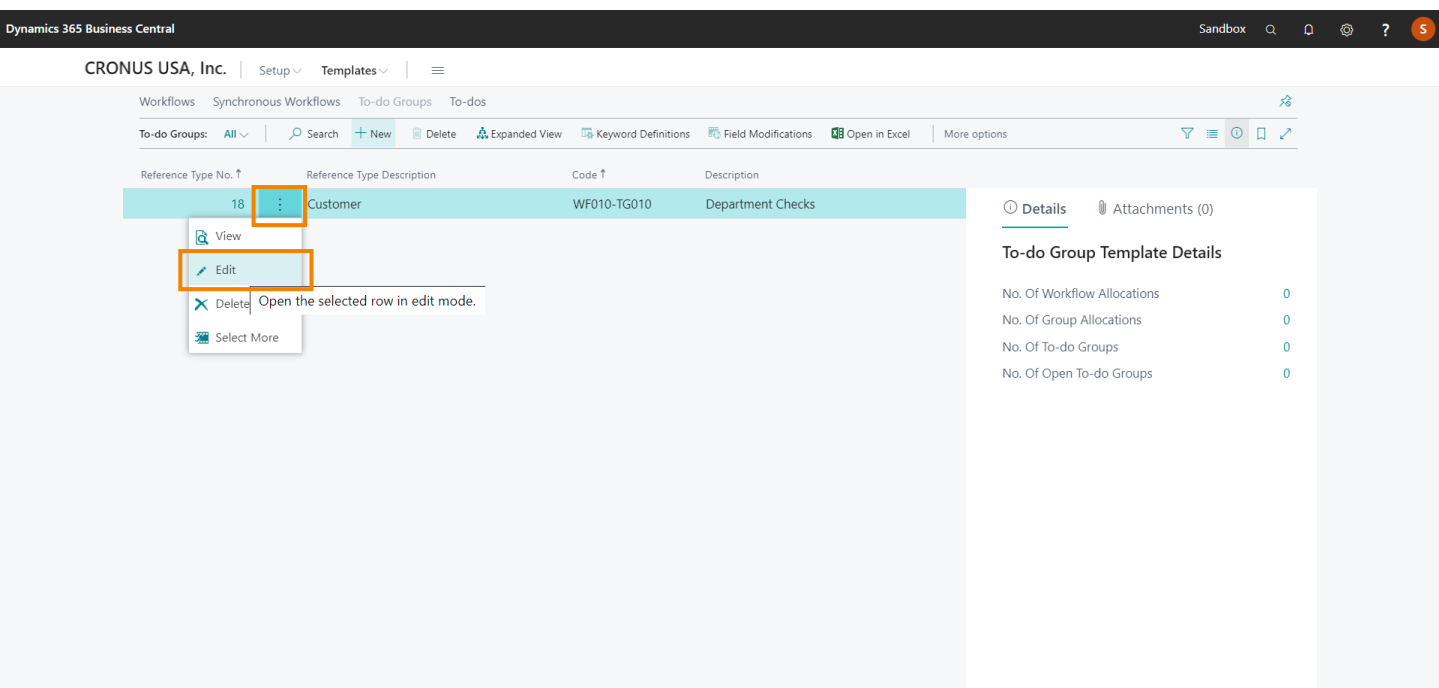
- 1) Close all pages and go back to the Role Center
- 2) Click on **Template**
- 3) Click on **To-do Groups**



The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The 'Setup' menu is open, and 'Templates' is selected. The 'To-do Groups' section is active, displaying a headline: 'There are no open workflows in this company.' Below this, there are several sections: 'Workflow Administration Activities' with a 'TASK SCHEDULER QUEUE' showing counts for ERRORS, PROCESSED MANUALLY, UNPROCESSED, WAITING, NOW, CRITICAL, and OVERDUE; 'ALL TO-DOS' with a 'TO BE COMPLETED' count; 'ALL WORKFLOWS' with counts for OPEN, CRITICAL, ON HOLD, and ARCHIVED; 'NEW' with buttons for New Employee, New Team, New Reference Type, and New Workflow Template; and 'PRODUCT VIDEOS' with buttons for Product Videos and Customer Prod... Videos.

Scenario 1: New Customer – To-Do Group Template

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



The screenshot displays the Dynamics 365 Business Central interface for the 'To-do Groups' section. The page title is 'CRONUS USA, Inc.' and the navigation pane shows 'Setup' > 'Templates'. The main area contains a table with the following columns: Reference Type No., Reference Type Description, Code, and Description. The first row is highlighted in light blue and contains the values: 18, Customer, WF010-TG010, and Department Checks. A context menu is open over the first row, with the 'Edit' option highlighted in orange. The context menu also includes 'View', 'Delete' (with a tooltip 'Open the selected row in edit mode.'), and 'Select More'. On the right side of the page, there is a 'Details' pane titled 'To-do Group Template Details' showing statistics: No. Of Workflow Allocations (0), No. Of Group Allocations (0), No. Of To-do Groups (0), and No. Of Open To-do Groups (0).

Reference Type No. ↑	Reference Type Description	Code ↑	Description
18	Customer	WF010-TG010	Department Checks

To-do Group Template Details

No. Of Workflow Allocations	0
No. Of Group Allocations	0
No. Of To-do Groups	0
No. Of Open To-do Groups	0

Scenario 1: New Customer – To-Do Group Template

1) To do Group Template:

Second line

Enter **To-do** in field Type

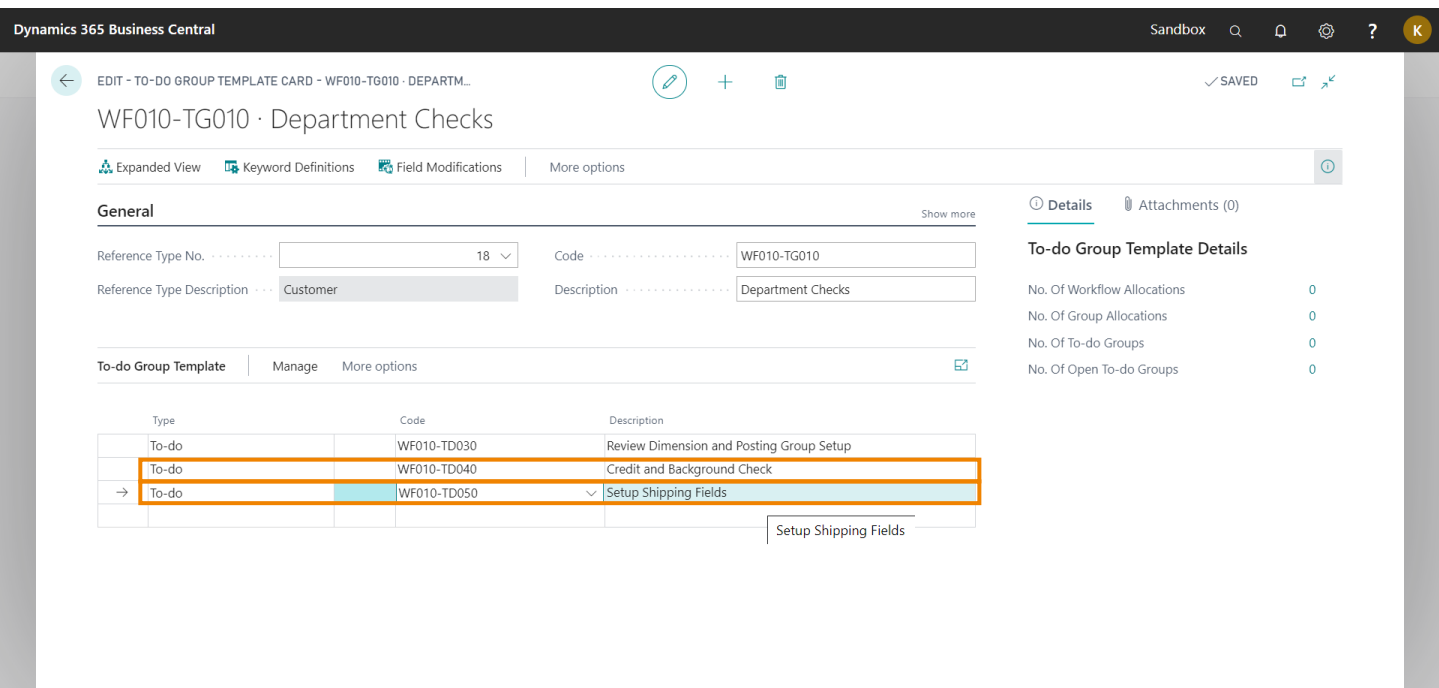
Enter **Credit and Background Check** in field Description

Third line

Enter **To-do** in field Type

Enter **Setup Shipping Fields** in field Description

2) Close page



Dynamics 365 Business Central

Sandbox

EDIT - TO-DO GROUP TEMPLATE CARD - WF010-TG010 - DEPARTM...

WF010-TG010 · Department Checks

Expanded View | Keyword Definitions | Field Modifications | More options

General Show more

Reference Type No. 18 | Code WF010-TG010

Reference Type Description Customer | Description Department Checks

To-do Group Template | Manage | More options

Type	Code	Description
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 Fields

To-do Group Template Details

Attachments (0)

No. Of Workflow Allocations 0

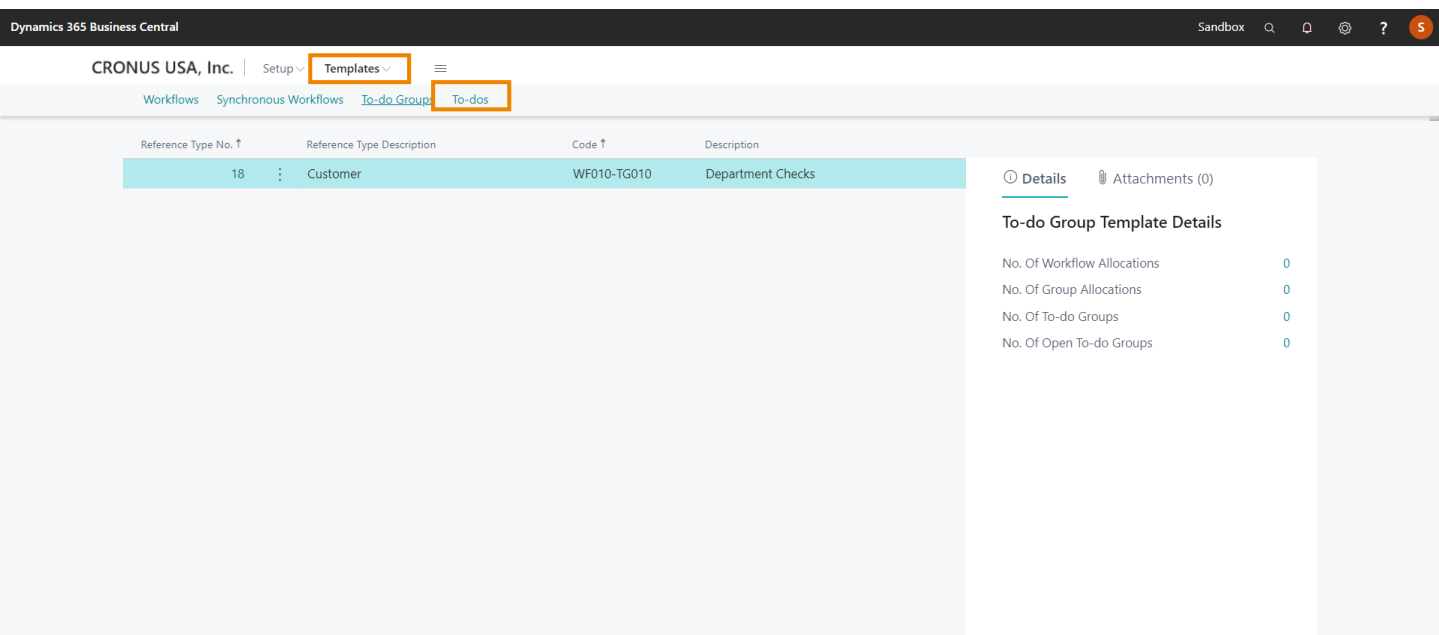
No. Of Group Allocations 0

No. Of To-do Groups 0

No. Of Open To-do Groups 0

Scenario 1: New Customer – To-Do Template

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



The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Dynamics 365 Business Central' on the left and 'Sandbox' with search, refresh, and help icons on the right. The main header displays 'CRONUS USA, Inc.' and a 'Setup' dropdown menu with 'Templates' selected. Below the header, a breadcrumb trail shows 'Workflows' > 'Synchronous Workflows' > 'To-do Groups' > 'To-dos', with 'To-dos' highlighted. The main content area features a table with the following data:

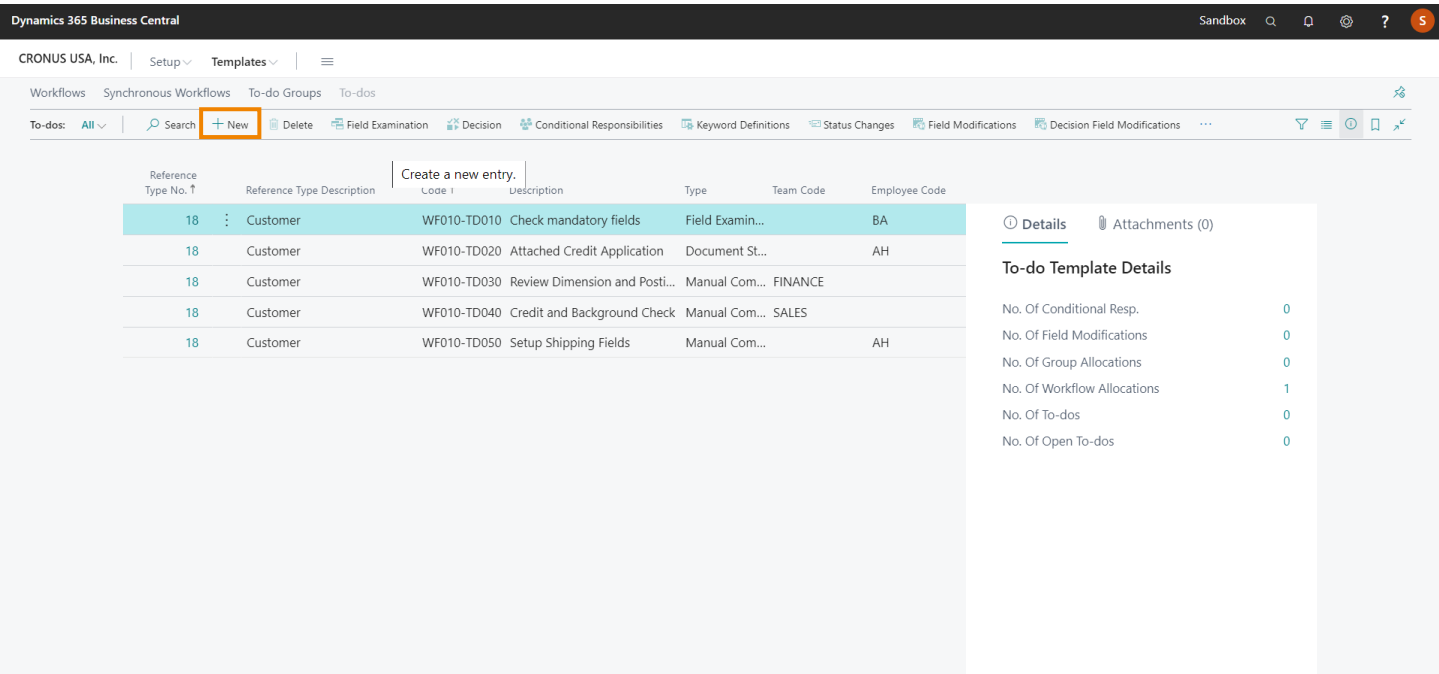
Reference Type No. ↑	Reference Type Description	Code ↑	Description
18	Customer	WF010-TG010	Department Checks

To the right of the table is a 'Details' pane for the selected record, showing 'Attachments (0)' and 'To-do Group Template Details' with the following values:

- No. Of Workflow Allocations: 0
- No. Of Group Allocations: 0
- No. Of To-do Groups: 0
- No. Of Open To-do Groups: 0

Scenario 1: New Customer – To-Do Template

1) Click on **+New**



The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.' The navigation pane on the left includes 'Workflows', 'Synchronous Workflows', 'To-do Groups', and 'To-dos'. The 'To-dos' section is active, showing a '+ New' button highlighted in orange. Below the navigation is a table of To-do Templates. The table has columns for Reference Type No., Reference Type Description, Code, Description, Type, Team Code, and Employee Code. The first row is highlighted in light blue. To the right of the table is a 'Details' pane for the selected template, showing 'To-do Template Details' with various metrics and their values.

Reference Type No.	Reference Type Description	Code	Description	Type	Team Code	Employee Code
18	Customer	WF010-TD010	Check mandatory fields	Field Examin...		BA
18	Customer	WF010-TD020	Attached Credit Application	Document St...		AH
18	Customer	WF010-TD030	Review Dimension and Posti...	Manual Com...	FINANCE	
18	Customer	WF010-TD040	Credit and Background Check	Manual Com...	SALES	
18	Customer	WF010-TD050	Setup Shipping Fields	Manual Com...		AH

To-do Template Details

- No. Of Conditional Resp. 0
- No. Of Field Modifications 0
- No. Of Group Allocations 0
- No. Of Workflow Allocations 1
- No. Of To-dos 0
- No. Of Open To-dos 0

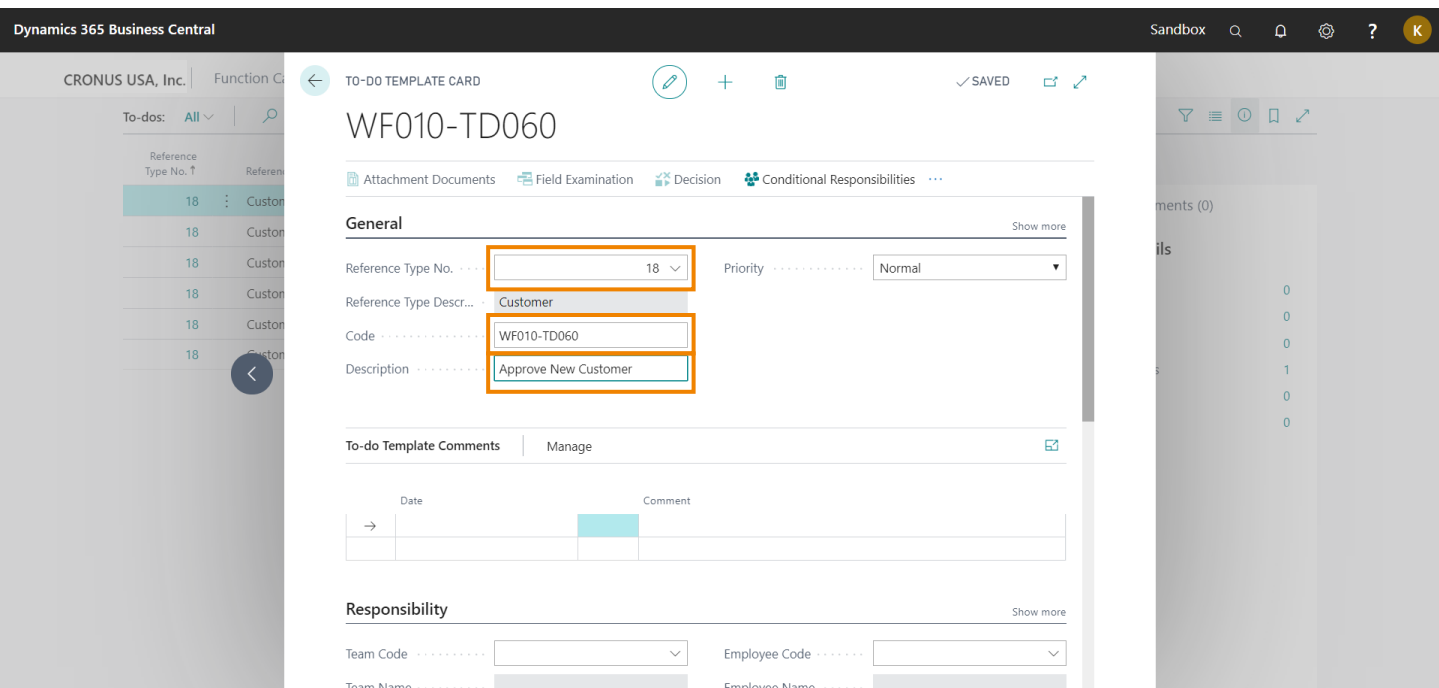
Scenario 1: New Customer – To-Do Template

1) General:

Enter Reference Type No. → 18

Enter Code → WF010-TD060

Enter Description → Approve New Customer



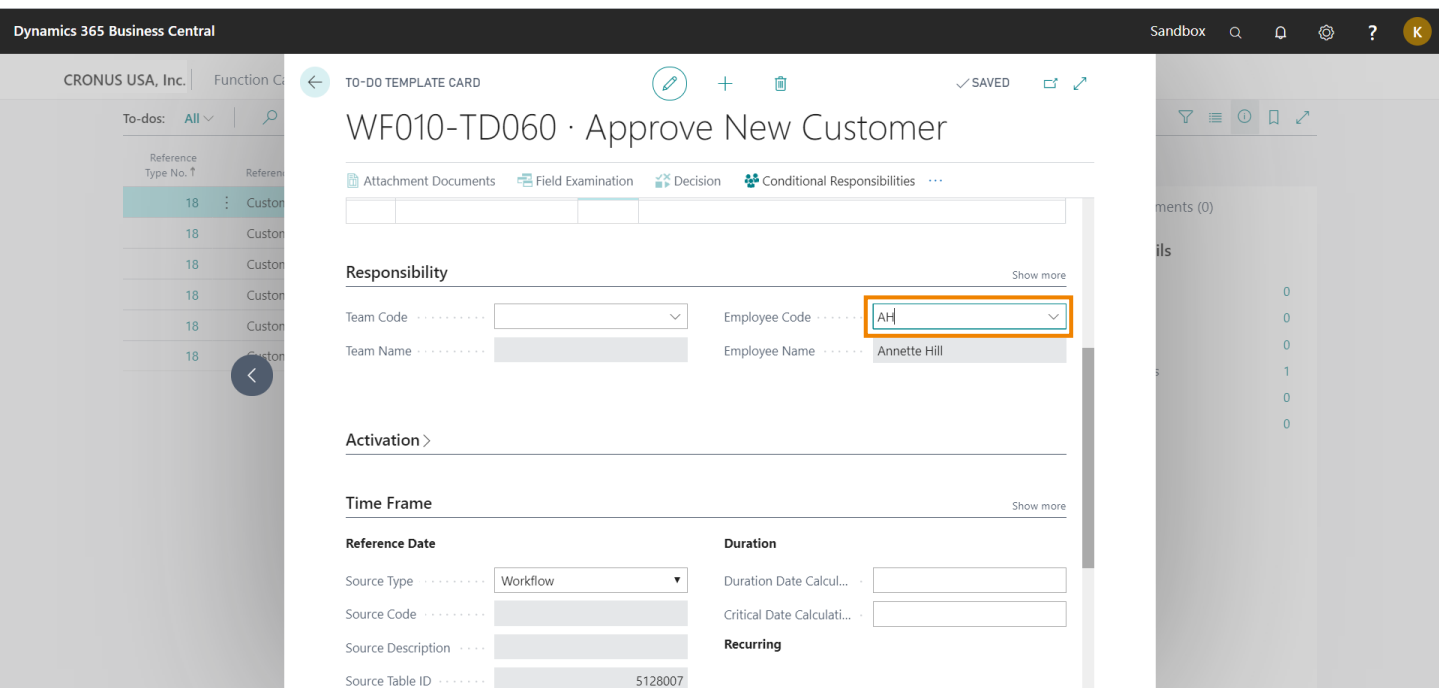
The screenshot displays the Dynamics 365 Business Central interface for a To-Do Template Card. The card is titled "TO-DO TEMPLATE CARD" and has a status of "SAVED". The card is for "CRONUS USA, Inc." and is in the "Function Center". The card is titled "WF010-TD060". The card has several tabs: "Attachment Documents", "Field Examination", "Decision", and "Conditional Responsibilities". The "General" tab is selected, showing the following fields:

- Reference Type No.: 18
- Reference Type Descr...: Customer
- Code: WF010-TD060
- Description: Approve New Customer
- Priority: Normal

The "To-do Template Comments" section is also visible, with a "Manage" button. The "Responsibility" section is also visible, with fields for "Team Code", "Employee Code", "Team Name", and "Employee Name".

Scenario 1: New Customer – To-Do Template

1) Responsibility: Enter Employee Code → AH



The screenshot displays the Dynamics 365 Business Central interface for a 'TO-DO TEMPLATE CARD'. The card title is 'WF010-TD060 · Approve New Customer'. The 'Responsibility' section is expanded, showing the following details:

- Team Code: [Dropdown]
- Employee Code: AH (highlighted with an orange box)
- Team Name: [Greyed out]
- Employee Name: Annette Hill

Below the 'Responsibility' section, the 'Activation' and 'Time Frame' sections are visible. The 'Reference Date' section shows 'Source Type' as 'Workflow' and 'Source Table ID' as '5128007'. The 'Duration' section includes 'Duration Date Calcul...' and 'Critical Date Calculati...' fields. The 'Recurring' section is also present.

Scenario 1: New Customer – To-Do Template

1) Time Frame:

Use look up value in field Source Type and select **To-do Group**

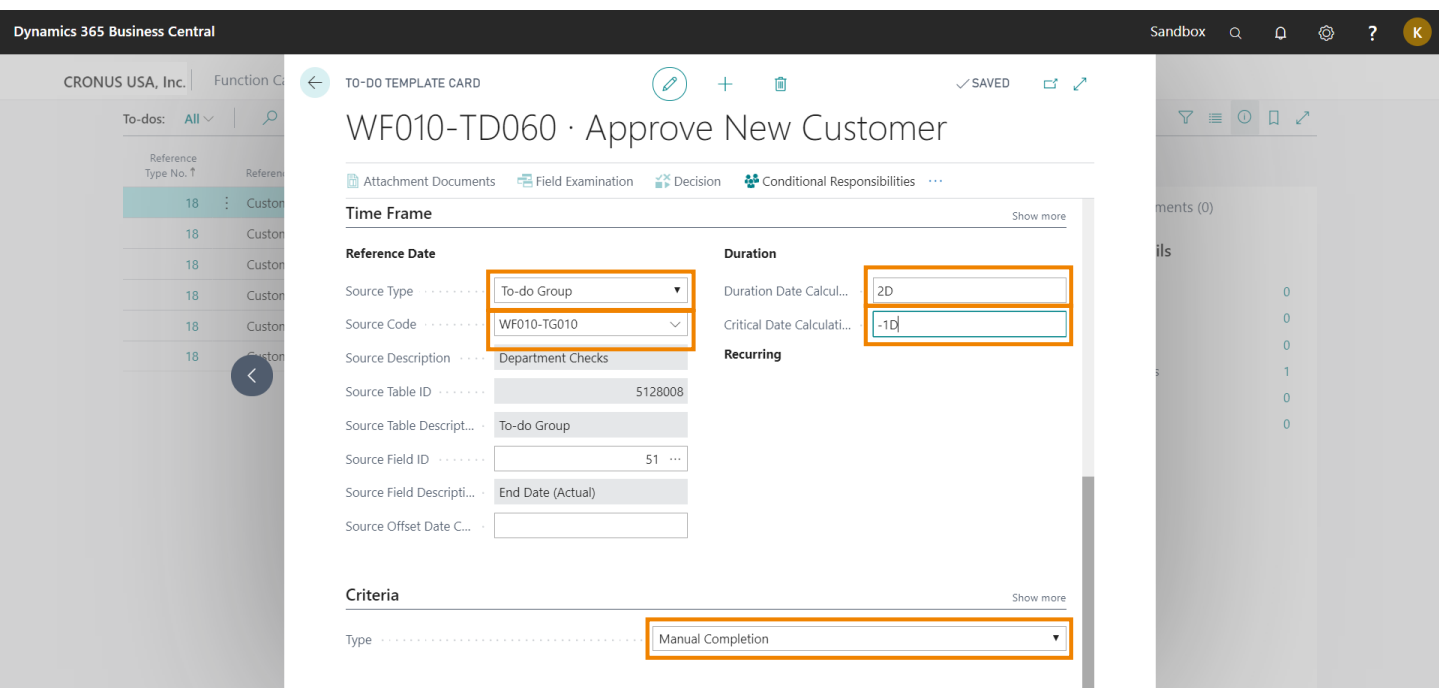
Enter Source Code → **WF010-TG010**

Enter Duration Date Calculation → **2D**

Enter Critical Date Calculation → **-1D**

2) Criteria: Enter Type → **Manual Completion**

3) Close PAGE



Dynamics 365 Business Central

CRONUS USA, Inc. | Function C

TO-DO TEMPLATE CARD

WF010-TD060 · Approve New Customer

Attachment Documents | Field Examination | Decision | Conditional Responsibilities

Time Frame Show more

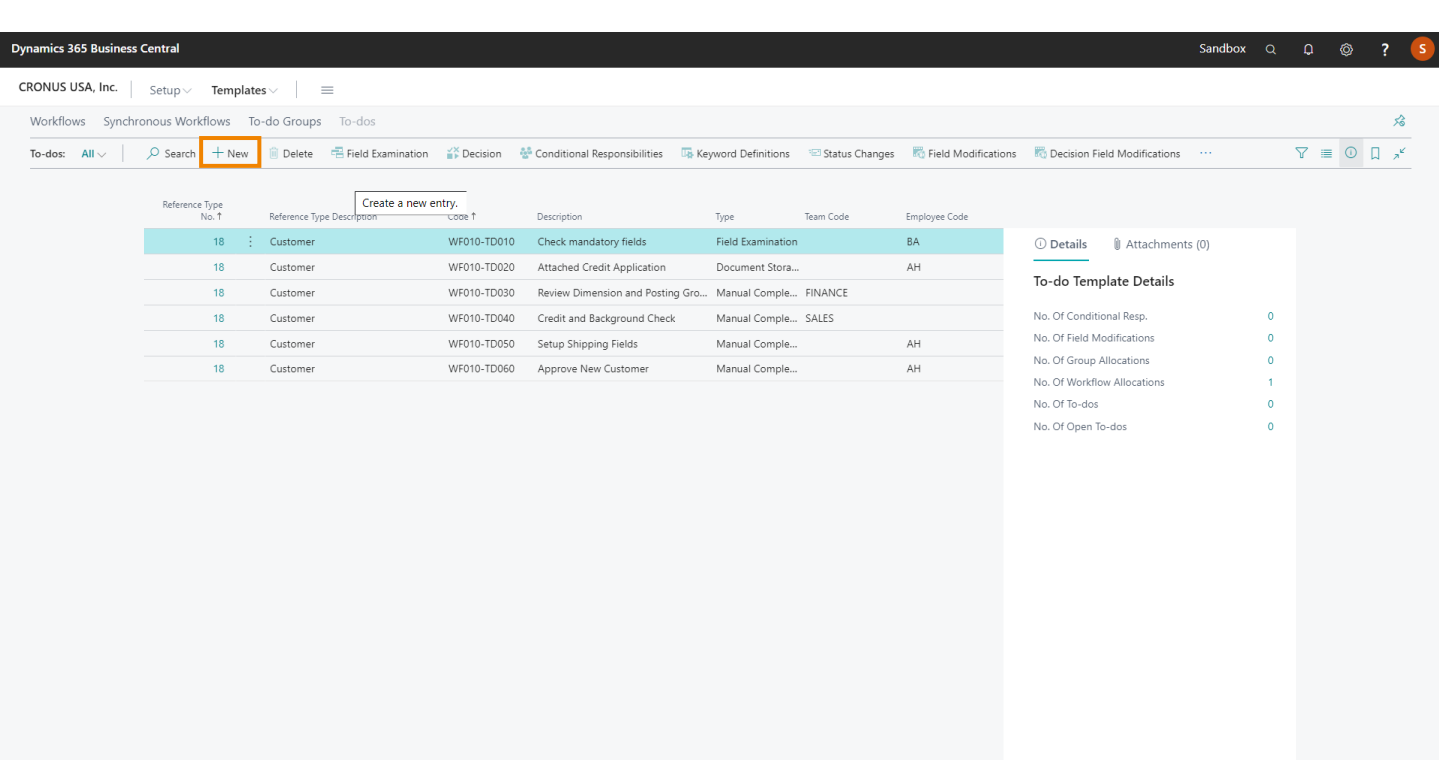
Reference Date	Duration
Source Type: To-do Group	Duration Date Calcul...: 2D
Source Code: WF010-TG010	Critical Date Calculati...: -1D
Source Description: Department Checks	Recurring
Source Table ID: 5128008	
Source Table Descript...: To-do Group	
Source Field ID: 51	
Source Field Descripti...: End Date (Actual)	
Source Offset Date C...:	

Criteria Show more

Type: Manual Completion

Scenario 1: New Customer – To-Do Template

1) Click on **+New**



The screenshot shows the Dynamics 365 Business Central interface. At the top, the breadcrumb navigation includes 'CRONUS USA, Inc.' and 'Templates'. Below this, the 'To-dos' section is active, displaying a list of templates. The '+ New' button is highlighted with an orange box. A tooltip 'Create a new entry.' is visible over the first row of the table.

Reference Type No. 1	Reference Type Description	Code 1	Description	Type	Team Code	Employee Code
18	Customer	WF010-TD010	Check mandatory fields	Field Examination		BA
18	Customer	WF010-TD020	Attached Credit Application	Document Stora...		AH
18	Customer	WF010-TD030	Review Dimension and Posting Gro...	Manual Comple...	FINANCE	
18	Customer	WF010-TD040	Credit and Background Check	Manual Comple...	SALES	
18	Customer	WF010-TD050	Setup Shipping Fields	Manual Comple...		AH
18	Customer	WF010-TD060	Approve New Customer	Manual Comple...		AH

On the right side of the interface, the 'To-do Template Details' panel is visible, showing the following statistics:

- No. Of Conditional Resp. 0
- No. Of Field Modifications 0
- No. Of Group Allocations 0
- No. Of Workflow Allocations 1
- No. Of To-dos 0
- No. Of Open To-dos 0

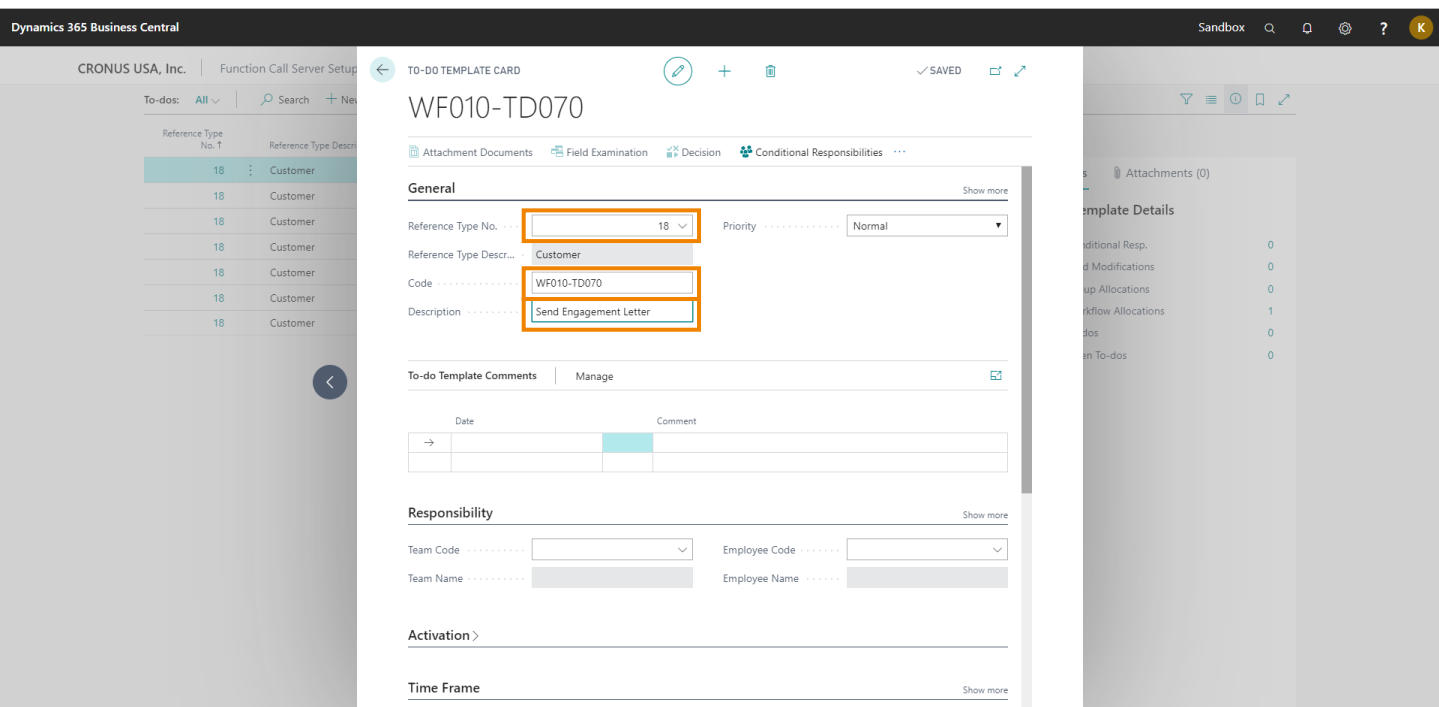
Scenario 1: New Customer – To-Do Template

1) General:

Enter Reference Type No. → 18

Enter Code → WF010-TD070

Enter Description → Send Engagement Letter



Dynamics 365 Business Central

CRONUS USA, Inc. | Function Call Server Setup

TO-DO TEMPLATE CARD

WF010-TD070

Attachment Documents Field Examination Decision Conditional Responsibilities

General Show more

Reference Type No. 18 Priority Normal

Reference Type Desc... Customer

Code WF010-TD070

Description Send Engagement Letter

To-do Template Comments Manage

Date	Comment

Responsibility Show more

Team Code Employee Code

Team Name Employee Name

Activation

Time Frame Show more

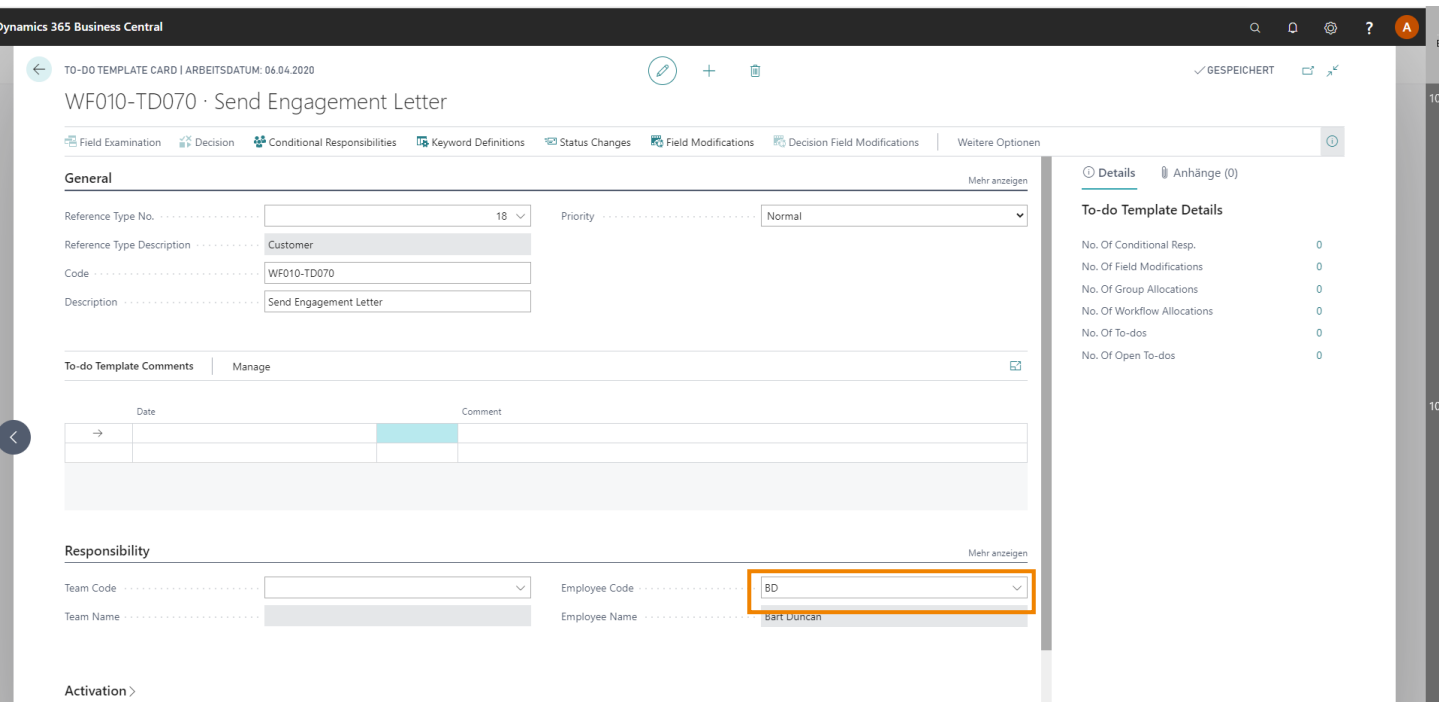
Attachments (0)

Template Details

Additional Resp.	0
Modifications	0
Up Allocations	0
Workflow Allocations	1
To-dos	0
Open To-dos	0

Scenario 1: New Customer – To-Do Template

1) Responsibility: Enter Employee Code → **BD**



The screenshot shows the 'TO-DO TEMPLATE CARD' in Dynamics 365 Business Central. The card title is 'WF010-TD070 · Send Engagement Letter'. The 'General' section includes fields for Reference Type No. (18), Reference Type Description (Customer), Code (WF010-TD070), and Description (Send Engagement Letter). The 'To-Do Template Comments' section is empty. The 'Responsibility' section shows Team Code, Team Name, Employee Code (BD), and Employee Name (Bart Duncan). The 'Activation' section is partially visible. A right-hand pane shows 'To-do Template Details' with various counts set to 0. The 'Employee Code' field is highlighted with an orange box.

General

Reference Type No. 18 Priority Normal

Reference Type Description Customer

Code WF010-TD070

Description Send Engagement Letter

To-Do Template Comments Manage

Date	Comment
→	

Responsibility

Team Code Employee Code **BD**

Team Name Employee Name Bart Duncan

To-do Template Details

No. Of Conditional Resp.	0
No. Of Field Modifications	0
No. Of Group Allocations	0
No. Of Workflow Allocations	0
No. Of To-dos	0
No. Of Open To-dos	0

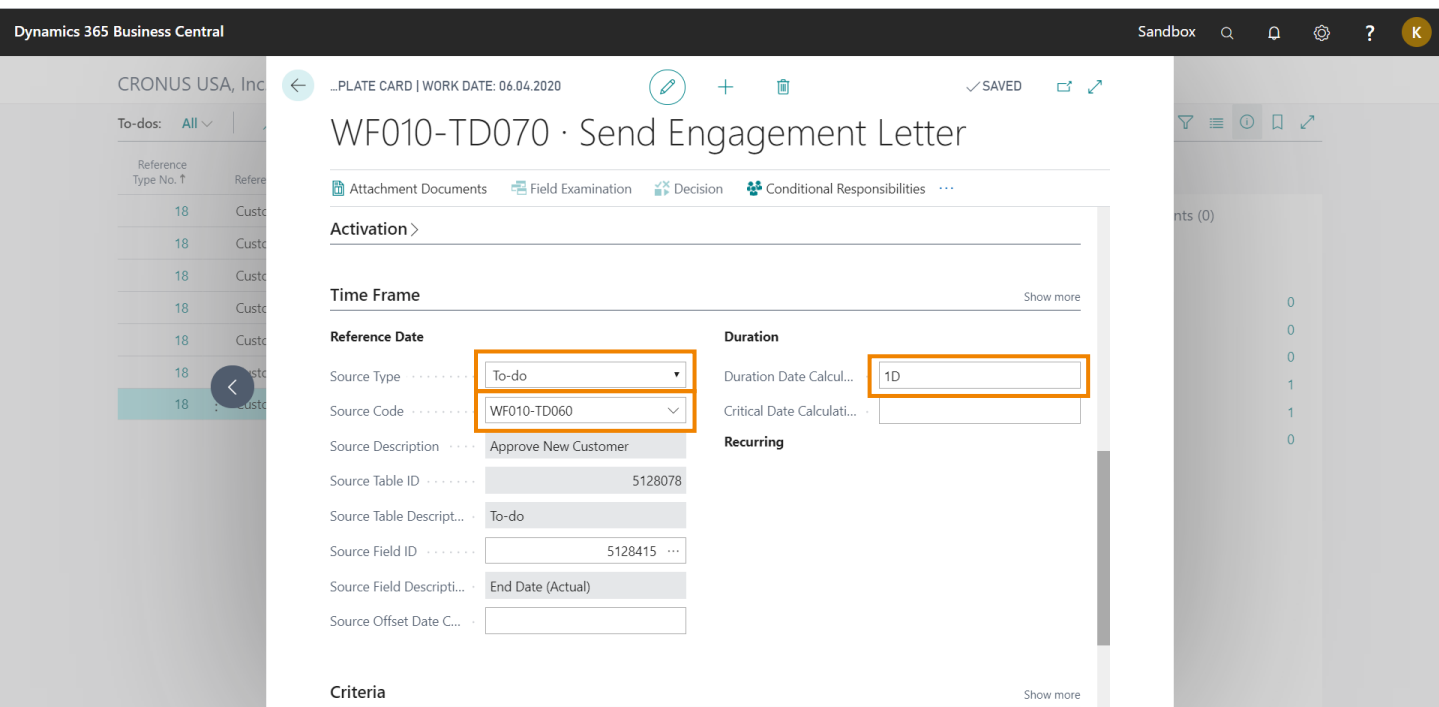
Scenario 1: New Customer – To-Do Template

1) Time Frame:

Use look up value in field Source Type and select **To-do**

Enter Source Code → **WF010-TD060**

Enter Duration Date Calculation → **1D**



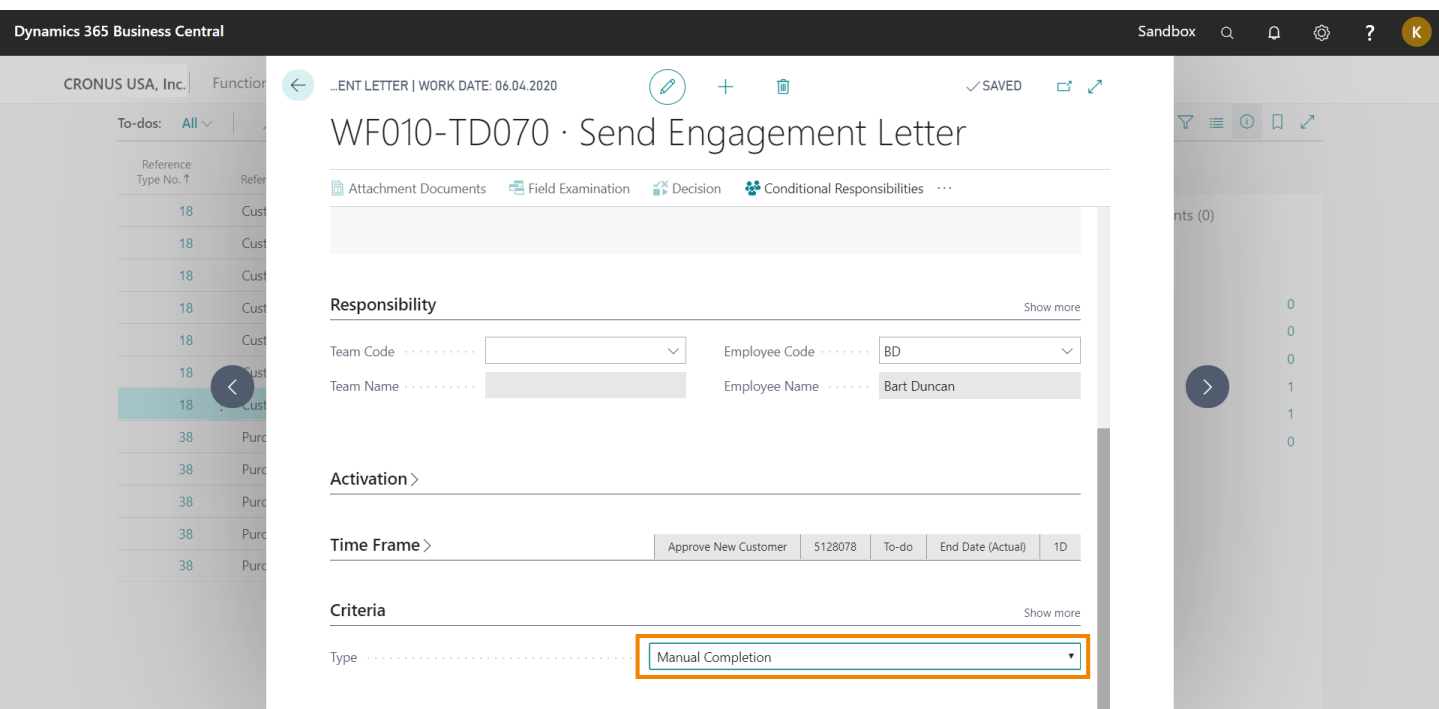
The screenshot displays the Dynamics 365 Business Central interface for configuring a workflow template. The main title is "WF010-TD070 · Send Engagement Letter". The "Time Frame" section is expanded, showing the following configuration:

- Reference Date:**
 - Source Type: To-do
 - Source Code: WF010-TD060
 - Source Description: Approve New Customer
 - Source Table ID: 5128078
 - Source Table Description: To-do
 - Source Field ID: 5128415
 - Source Field Description: End Date (Actual)
 - Source Offset Date Calculation: (empty)
- Duration:**
 - Duration Date Calculation: 1D
 - Critical Date Calculation: (empty)
- Recurring:** (empty)

The "Criteria" section is also visible at the bottom, with a "Show more" link.

Scenario 1: New Customer – To-Do Template

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



The screenshot displays the Dynamics 365 Business Central interface. The main window shows a to-do item titled "WF010-TD070 · Send Engagement Letter" with a work date of 06.04.2020. The item is saved and has several action buttons: Attachment Documents, Field Examination, Decision, and Conditional Responsibilities. The "Responsibility" section includes fields for Team Code, Employee Code (BD), Team Name, and Employee Name (Bart Duncan). The "Activation" and "Time Frame" sections are also visible. The "Criteria" section shows the "Type" dropdown menu set to "Manual Completion", which is highlighted with an orange box. The left sidebar shows a list of to-do items, and the right sidebar shows a list of items with counts.

Scenario 1: New Customer – Workflow Template

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

Dynamics 365 Business Central | Sandbox

CRONUS USA, Inc. | Setup ▾ **Templates** ▾ | ☰

Workflows | Synchronous Workflows | To-do Groups | To-dos

To-dos: All ▾ | Search | + New | Delete | Field Examination | Decision | Conditional Responsibilities | Keyword Definitions | Status Changes | Field Modifications | Decision Field Modifications | ...

Reference Type No. ↑	Reference Type Description	Code ↑	Description	Type	Team Code	Employee Code
18	Customer	WF010-TD0...	Check mandatory fields	Field Exami...		BD
18	Customer	WF010-TD0...	Attached Credit Application	Manual Co...		AH
18	Customer	WF010-TD0...	Review Dimension and Pos...	Manual Co...	FINANCE	
18	Customer	WF010-TD0...	Credit and Background Ch...	Manual Co...	SALES	
18	Customer	WF010-TD0...	Setup Shipping Fields	Manual Co...		AH
18	Customer	WF010-TD0...	Approve New Customer	Manual Co...		AH
18	Customer	WF010-TD0...	Send Engagement Letter	Manual Co...		BD

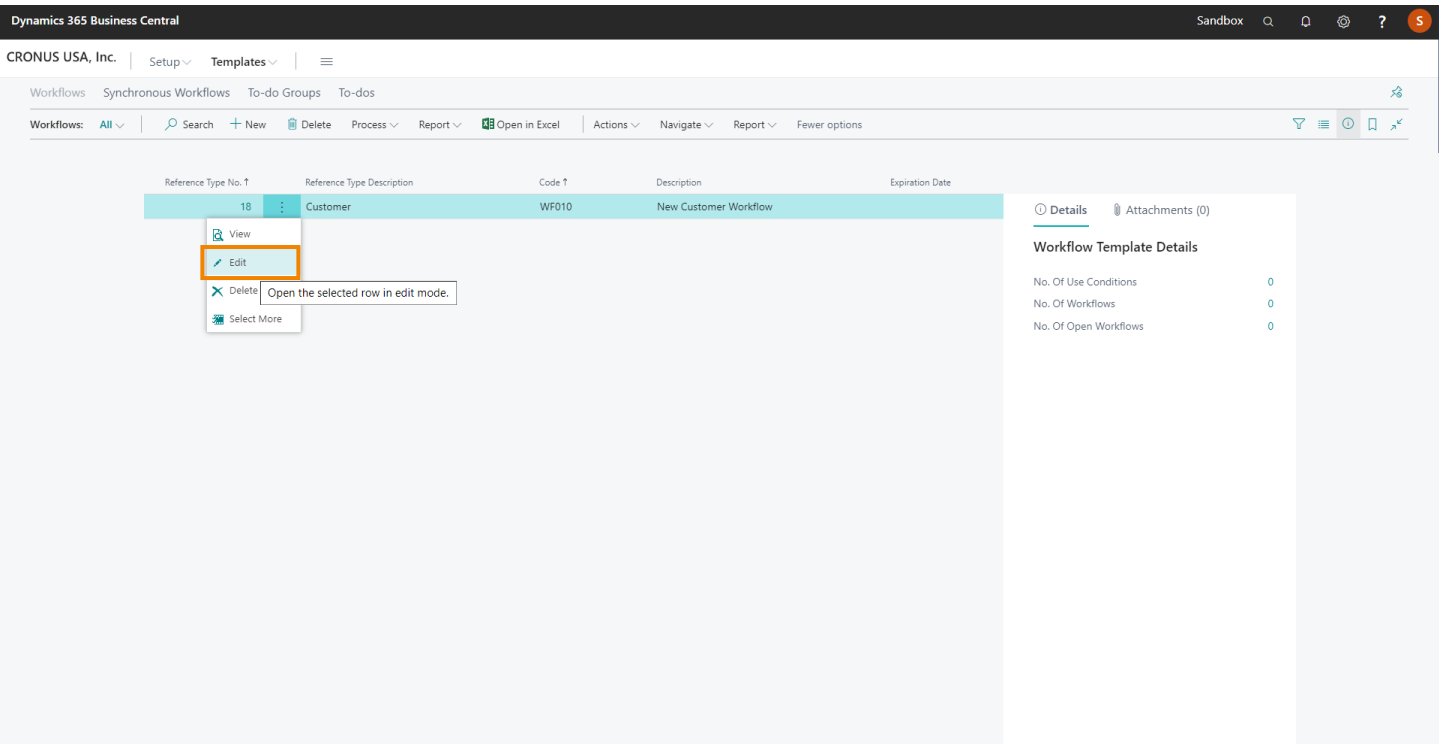
Details | Attachments (0)

To-do Template Details

No. Of Conditional Resp.	0
No. Of Field Modifications	0
No. Of Group Allocations	0
No. Of Workflow Allocations	1
No. Of To-dos	1

Scenario 1: New Customer – Workflow Template

- 1) Click on **Edit**



The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' on the left and 'Sandbox' on the right. Below the header, the breadcrumb navigation indicates 'CRONUS USA, Inc.' followed by 'Setup' and 'Templates'. The main content area shows a table of workflow templates. The table has columns for 'Reference Type No.', 'Reference Type Description', 'Code', and 'Description'. One row is highlighted in light blue, representing a workflow template with Reference Type No. 18, Reference Type Description 'Customer', Code 'WF010', and Description 'New Customer Workflow'. A context menu is open over this row, with the 'Edit' option highlighted by an orange box. The context menu also includes 'View', 'Delete' (with a tooltip 'Open the selected row in edit mode.'), and 'Select More'. On the right side of the interface, there is a 'Details' pane for the selected workflow template, showing 'Workflow Template Details' with three metrics: 'No. Of Use Conditions' (0), 'No. Of Workflows' (0), and 'No. Of Open Workflows' (0).

Reference Type No. ↑	Reference Type Description	Code ↑	Description	Expiration Date
18	Customer	WF010	New Customer Workflow	

Workflow Template Details

- No. Of Use Conditions: 0
- No. Of Workflows: 0
- No. Of Open Workflows: 0

Scenario 1: New Customer – Workflow Template

1) Workflow Templates:

Second line

Enter Type → To-do

Enter Code → WF010-TD020

Third line

Enter Type → To-do Group

Enter Code → WF010-TG010

Fourth line

Enter Type → To-do

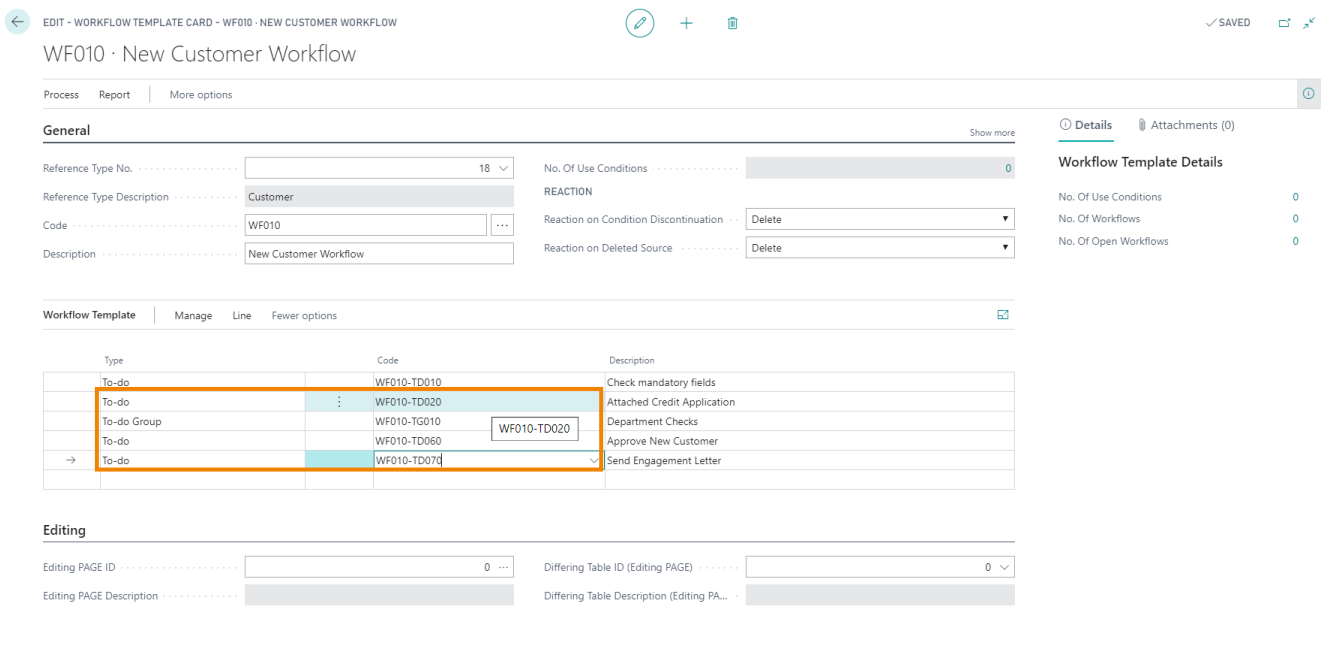
Enter Code → WF010-TD060

Fifth line

Enter Type → To-do

Enter Code → WF010-TD070

2) Close PAGE



EDIT - WORKFLOW TEMPLATE CARD - WF010 - NEW CUSTOMER WORKFLOW

WF010 · New Customer Workflow

Process Report More options

General Show more

Reference Type No. 18 No. Of Use Conditions 0

Reference Type Description Customer REACTION

Code WF010 Reaction on Condition Discontinuation Delete

Description New Customer Workflow Reaction on Deleted Source Delete

Workflow Template Manage Line Fewer options

Type	Code	Description
To-do	WF010-TD010	Check mandatory fields
To-do	WF010-TD020	Attached Credit Application
To-do Group	WF010-TG010	Department Checks
To-do	WF010-TD060	Approve New Customer
To-do	WF010-TD070	Send Engagement Letter

Editing

Editing PAGE ID 0 Differing Table ID (Editing PAGE) 0

Editing PAGE Description Differing Table Description (Editing PA...

Workflow Template Details

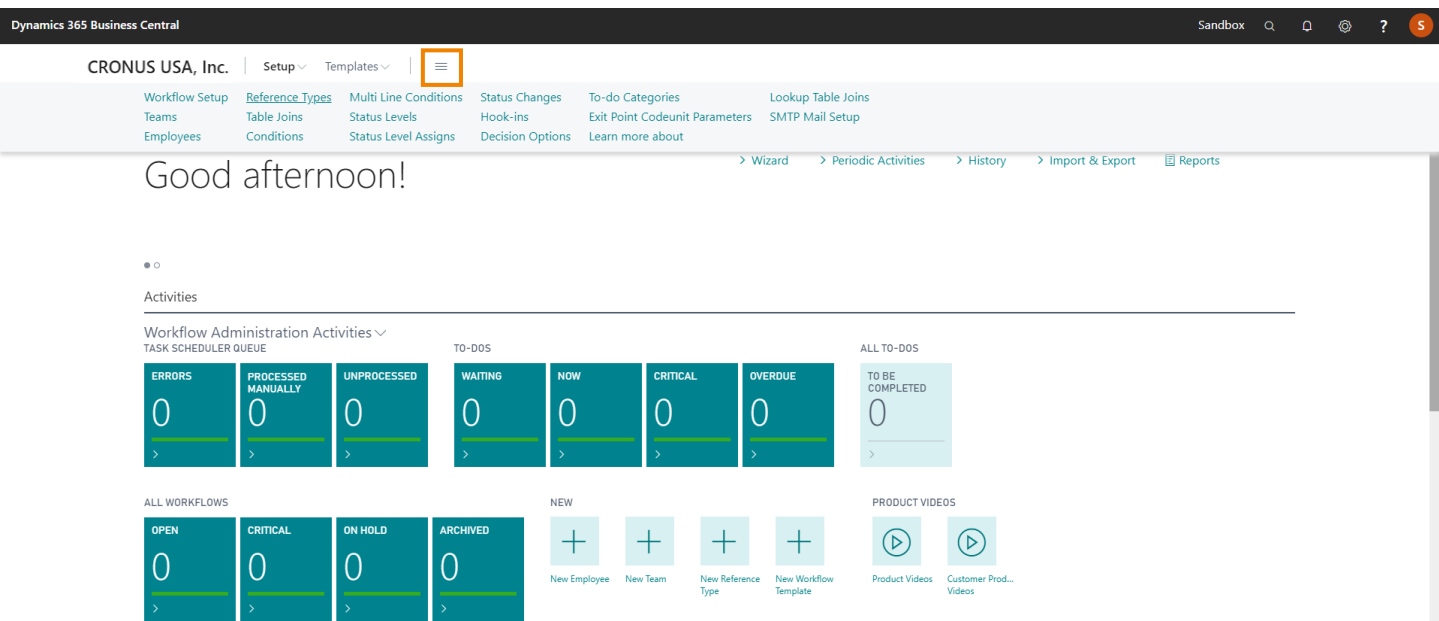
No. Of Use Conditions 0

No. Of Workflows 0

No. Of Open Workflows 0

Scenario 1: New Customer – Reference Types

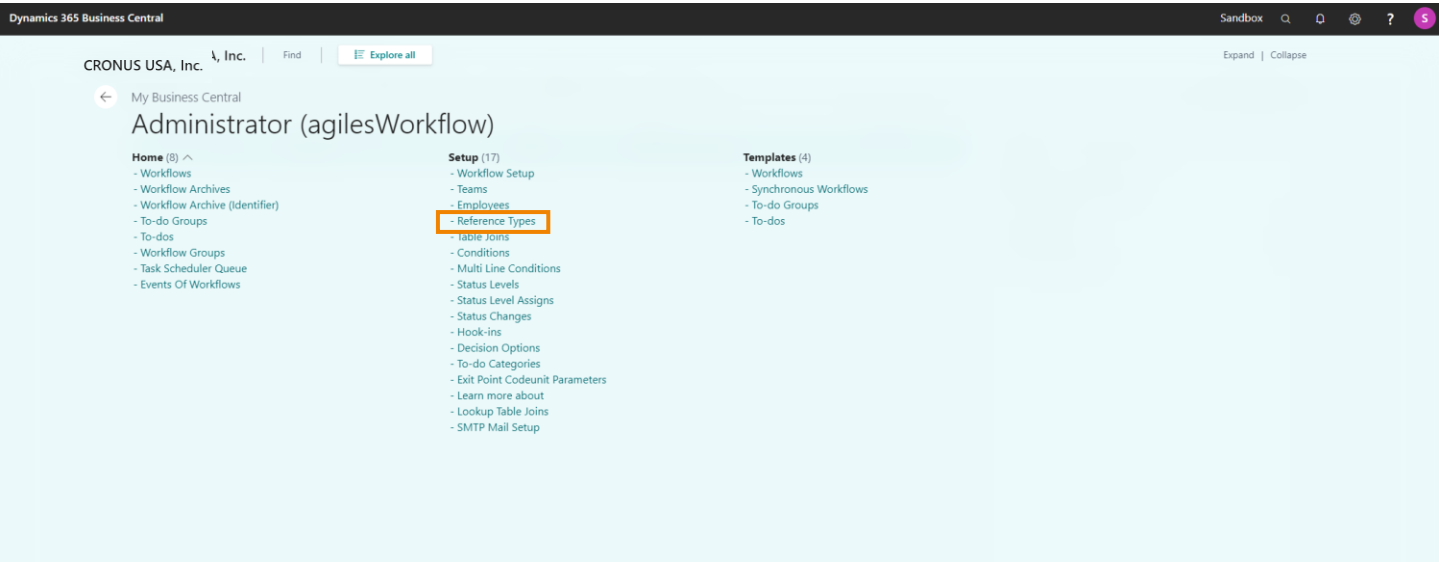
- 1) Click on the **Burger Menu**



The screenshot displays the Dynamics 365 Business Central user interface. At the top, the header shows "Dynamics 365 Business Central" on the left and "Sandbox" with various utility icons on the right. Below the header, the navigation pane for "CRONUS USA, Inc." is visible, with the "Burger Menu" icon (three horizontal lines) highlighted with an orange box. The main content area displays a greeting "Good afternoon!" and a "Workflow Administration Activities" section. This section includes a "TASK SCHEDULER QUEUE" with metrics for ERRORS, PROCESSED MANUALLY, UNPROCESSED, WAITING, NOW, CRITICAL, and OVERDUE. It also features "ALL TO-DOS" and "ALL WORKFLOWS" sections with various workflow status cards and action buttons like "New Employee", "New Team", "New Reference Type", "New Workflow Template", "Product Videos", and "Customer Prod... Videos".

Scenario 1: New Customer – Reference Types

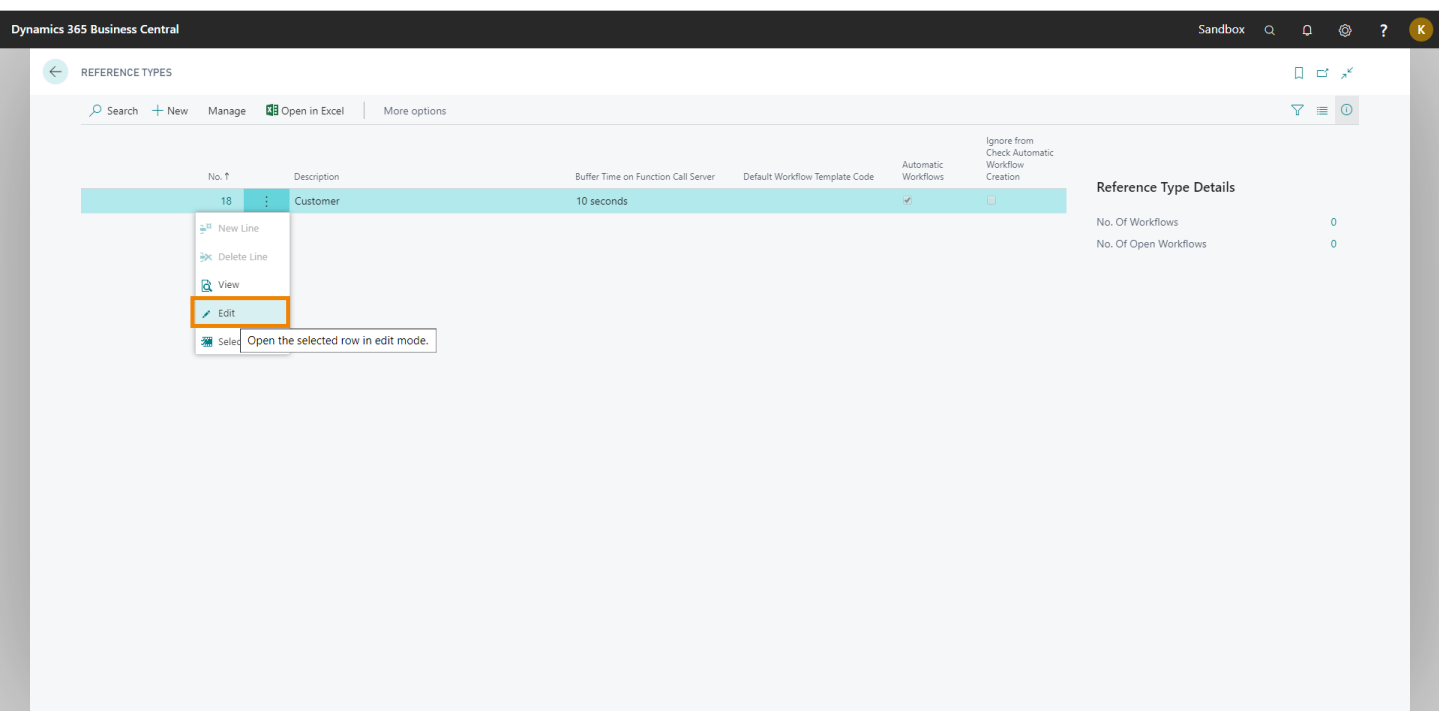
- 1) Click on **Reference Types**



The screenshot shows the Dynamics 365 Business Central Administrator interface. The breadcrumb trail is "My Business Central" > "Administrator (agilesWorkflow)". The "Setup (17)" section is expanded, and the "Reference Types" menu item is highlighted with an orange box. Other menu items in the "Setup" section include Workflow Setup, Teams, Employees, Table Joins, Conditions, Multi Line Conditions, Status Levels, Status Level Assigns, Status Changes, Hook-ins, Decision Options, To-do Categories, Exit Point Codeunit Parameters, Learn more about, Lookup Table Joins, and SMTP Mail Setup. The "Home (8)" section includes Workflows, Workflow Archives, Workflow Archive (Identifier), To-do Groups, To-dos, Workflow Groups, Task Scheduler Queue, and Events Of Workflows. The "Templates (4)" section includes Workflows, Synchronous Workflows, To-do Groups, and To-dos. The top navigation bar shows "Dynamics 365 Business Central", "CRONUS USA, Inc.", a search bar, and "Explore all". The top right corner shows "Sandbox" and "Expand | Collapse".

Scenario 1: New Customer – Reference Types

- 1) Click on **Edit**



The screenshot displays the Dynamics 365 Business Central interface for the 'REFERENCE TYPES' table. The table has the following columns: No. ↑, Description, Buffer Time on Function Call Server, Default Workflow Template Code, Automatic Workflows, and Ignore from Check Automatic Workflow Creation. A single row is visible with No. 18, Description 'Customer', Buffer Time '10 seconds', and 'Automatic Workflows' checked. A context menu is open over the row, with the 'Edit' option highlighted. A tooltip for the 'Edit' option reads 'Open the selected row in edit mode.' To the right of the table, the 'Reference Type Details' section shows 'No. Of Workflows' as 0 and 'No. Of Open Workflows' as 0.

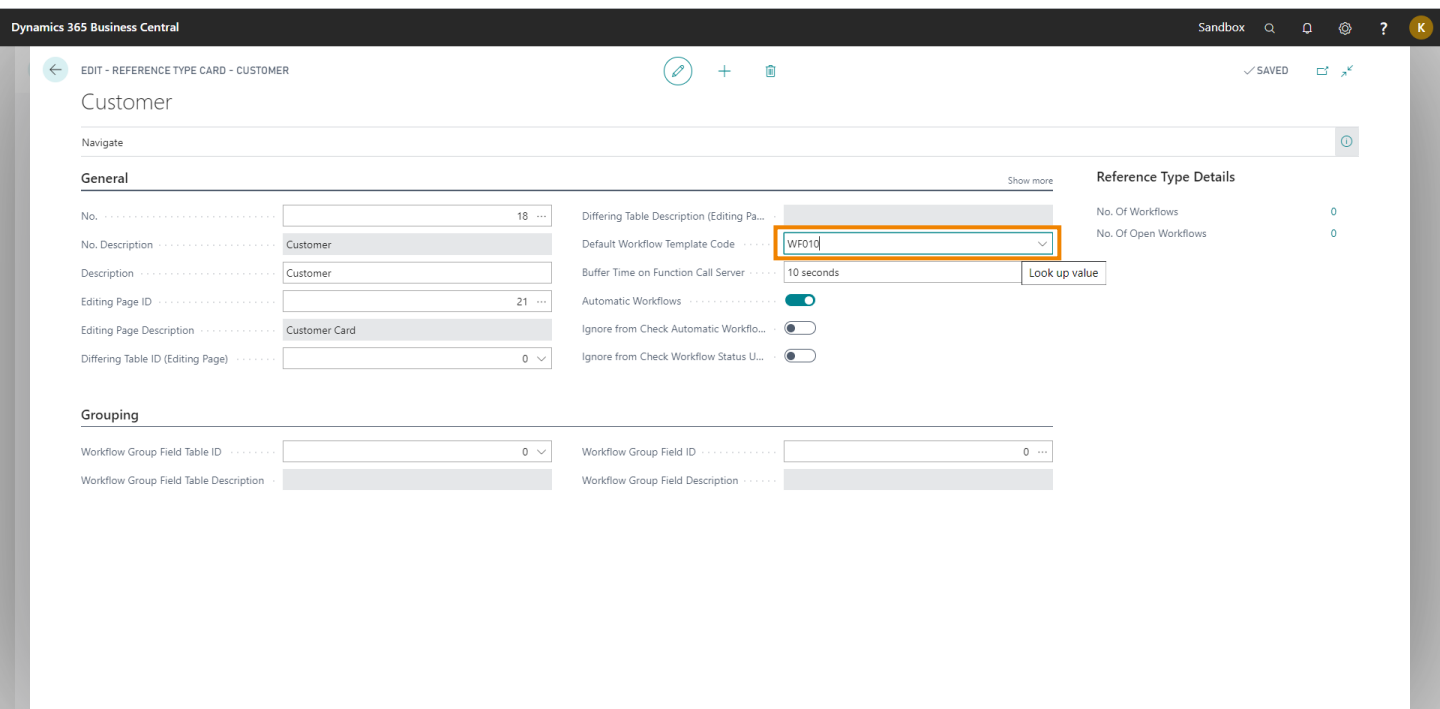
No. ↑	Description	Buffer Time on Function Call Server	Default Workflow Template Code	Automatic Workflows	Ignore from Check Automatic Workflow Creation
18	Customer	10 seconds		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Reference Type Details

No. Of Workflows	0
No. Of Open Workflows	0

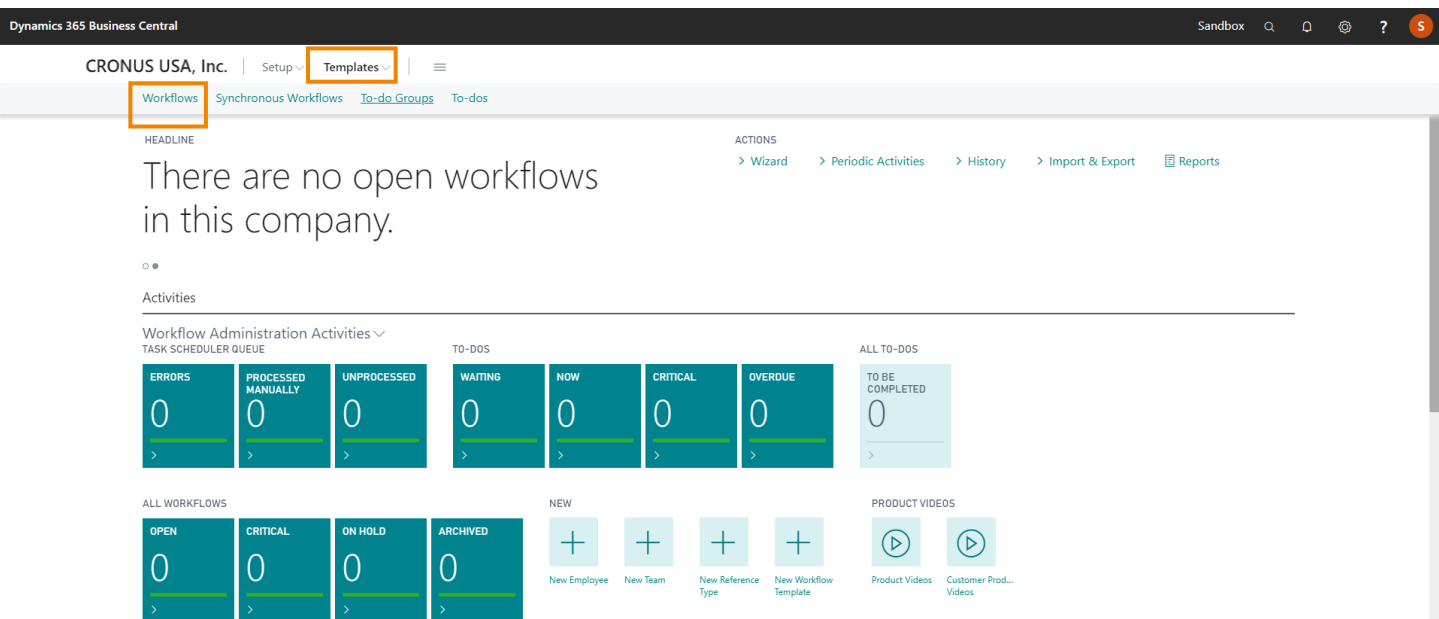
Scenario 1: New Customer – Reference Types

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



Scenario 1: New Customer – Workflow Template

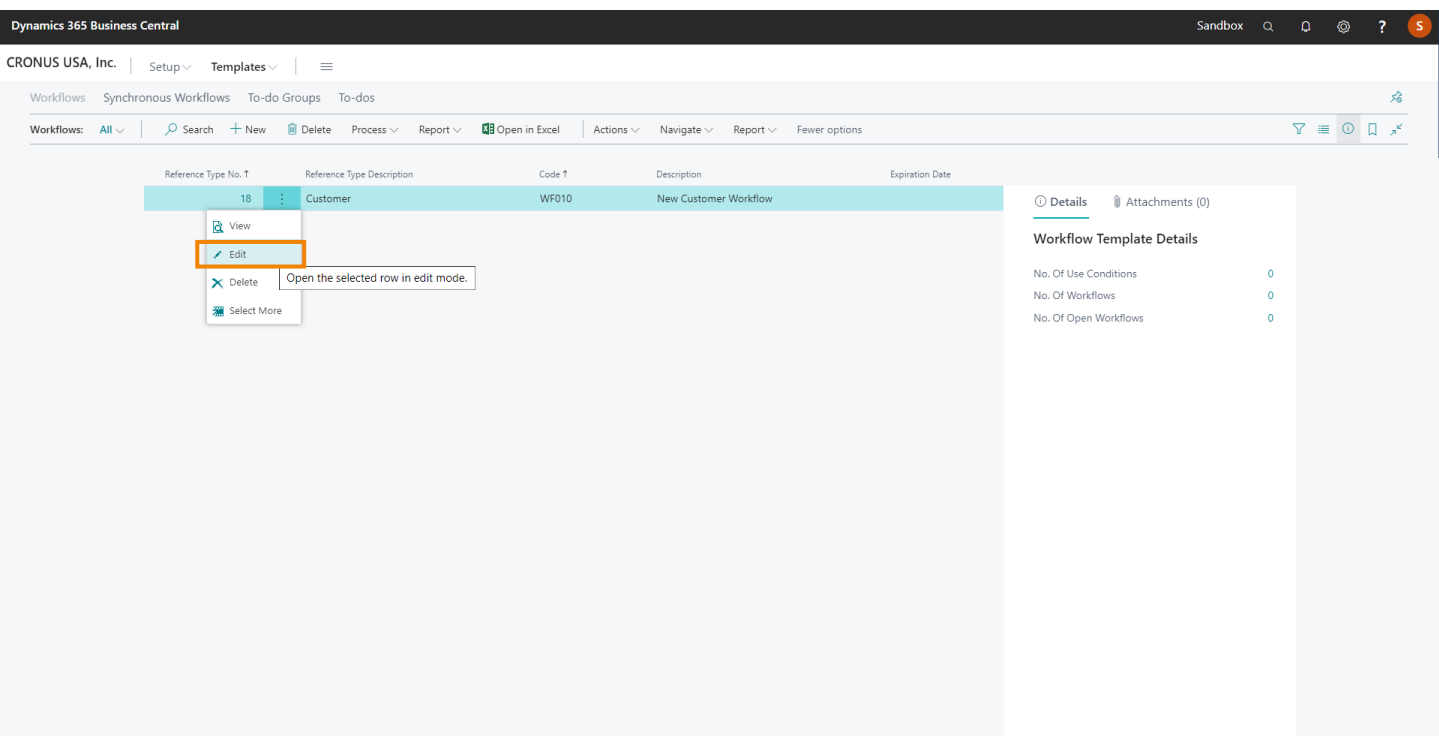
- 1) Go back to the Role Center
- 2) Click on **Templates**
- 3) Click on **Workflows**



The screenshot shows the Dynamics 365 Business Central interface for a company named "CRONUS USA, Inc.". The top navigation bar includes "Setup" and "Templates" (highlighted with an orange box). Below it, the "Workflows" tab is selected and highlighted with an orange box. The main content area displays a message: "There are no open workflows in this company." Below this message, there are several sections: "Activities" (Workflow Administration Activities), "TASK SCHEDULER QUEUE" (with sub-sections: ERRORS, PROCESSED MANUALLY, UNPROCESSED, WAITING, NOW, CRITICAL, OVERDUE, and TO BE COMPLETED), "ALL WORKFLOWS" (with sub-sections: OPEN, CRITICAL, ON HOLD, and ARCHIVED), "NEW" (with sub-sections: New Employee, New Team, New Reference Type, and New Workflow Template), and "PRODUCT VIDEOS" (with sub-sections: Product Videos and Customer Prod... Videos). The interface is clean and modern, with a dark header and a light main content area.

Scenario 1: New Customer – Workflow Template

- 1) Click on **Edit**



The screenshot displays the Dynamics 365 Business Central interface. At the top, the navigation bar shows 'Dynamics 365 Business Central' and 'Sandbox'. Below this, the breadcrumb trail indicates 'CRONUS USA, Inc.' > 'Setup' > 'Templates'. The main area shows a list of workflow templates. The first row is selected and highlighted in light blue. A context menu is open over the 'Edit' button of this row, which is highlighted with an orange border. A tooltip next to the 'Edit' button reads 'Open the selected row in edit mode.' The table columns are 'Reference Type No.', 'Reference Type Description', 'Code', and 'Description'. The selected row has a Reference Type No. of 18, a Reference Type Description of 'Customer', a Code of 'WF010', and a Description of 'New Customer Workflow'. On the right side, there is a 'Details' pane for the selected workflow template, showing 'Workflow Template Details' with three metrics: 'No. Of Use Conditions' (0), 'No. Of Workflows' (0), and 'No. Of Open Workflows' (0).

Reference Type No.	Reference Type Description	Code	Description	Expiration Date
18	Customer	WF010	New Customer Workflow	

Workflow Template Details

- No. Of Use Conditions: 0
- No. Of Workflows: 0
- No. Of Open Workflows: 0

Scenario 1: New Customer – Workflow Template

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

Dynamics 365 Business Central | Sandbox

WORKFLOW TEMPLATE CARD | WORK DATE: 06.04.2020

WF010 · New Customer Workflow

Process Report **Actions** Navigate Report Fewer options

Functions

Expanded View

Expanded View - Date Reference

Visual View - Network Diagram

Description New Customer Workflow

REACTION

No. Of Use Conditions 0

Reaction on Condition D... Delete

Reaction on Deleted Sou... Delete

Workflow Template Details

No. Of Use Conditions 0

No. Of Workflows 0

No. Of Open Workflows 0

Workflow Template | Manage More options

Type	Code	Description
→ To-do	WF010-TD010	Check mandatory fields
To-do	WF010-TD020	Attached Credit Application
To-do Group	WF010-TG010	Department Checks
To-do	WF010-TD060	Approve New Customer
To-do	WF010-TD070	Send Engagement Letter

Editing

Editing PAGE ID 0 ... Differing Table ID (Editin... 0

Editing PAGE Description ... Differing Table Descripti...

Scenario 1: New Customer – Workflow Template

1) Final Workflow Template



The screenshot displays the 'New Customer Workflow' template in Dynamics 365 Business Central. The workflow is structured as follows:

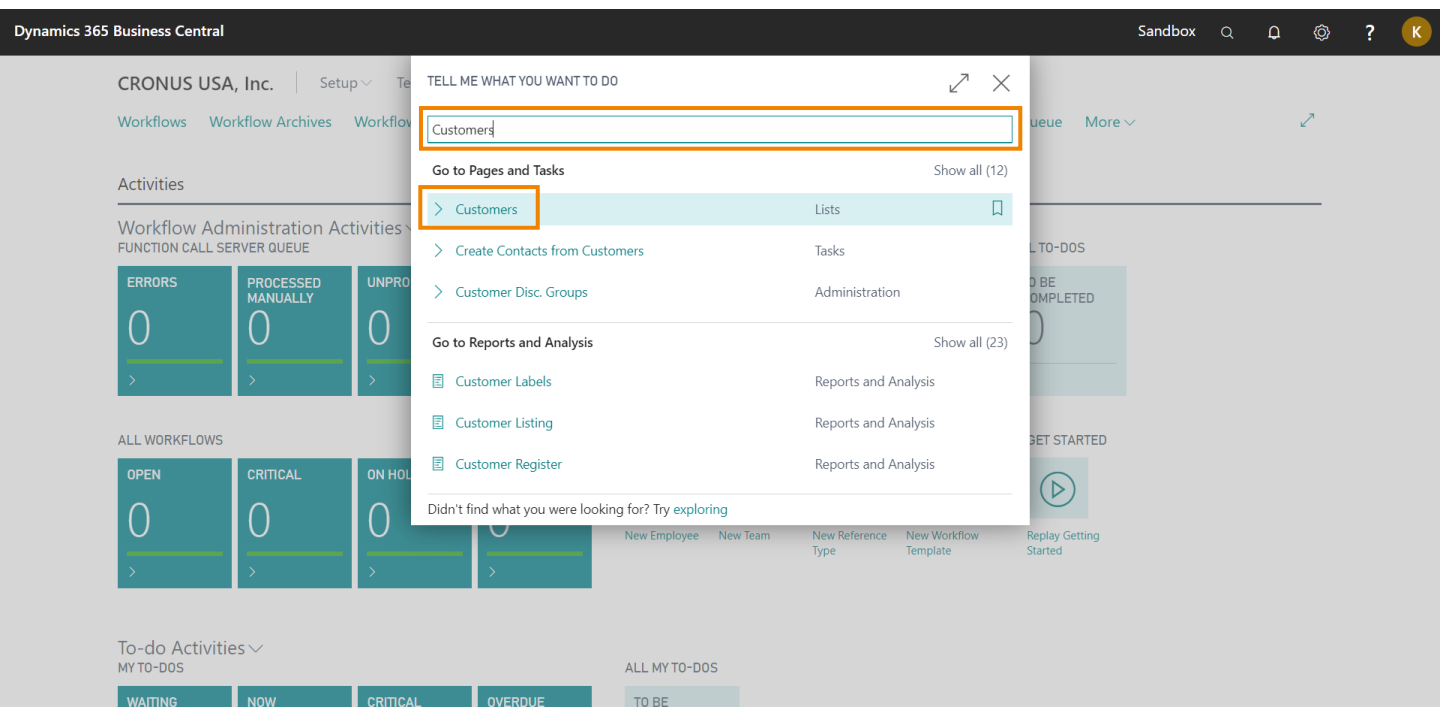
- WF010-TD010** (Start)
- WF010-TD020** (Next step)
- Department Checks** (Group containing three parallel tasks):
 - WF010-TD030**
 - WF010-TD040**
 - WF010-TD050**
- WF010-TD060** (Next step)
- WF010-TD070** (End)

The interface includes a left-hand navigation pane with 'EDIT - WORKFLOW TEMPLA' and 'WF010 · New' visible. The right-hand pane shows 'Workflow Template Details' with fields for 'No. Of Use Conditions', 'No. Of Workflows', and 'No. Of Open Workflows'.

User Perspective Scenario 1

User Perspective Scenario 1

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



User Perspective Scenario 1

1) Click on **+New**

Dynamics 365 Business Central

Sandbox

CUSTOMERS | WORK DATE: 06.04.2020

Search **+ New** Manage Process Report New Document Customer Navigate Open in Excel More options

create a new entry.

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Be
10000	Adatum Corporation				Robert Townes	
20000	Trey Research				Helen Ray	
30000	School of Fine Art				Meagan Bond	5
40000	Alpine Ski House				Ian Deberry	
50000	Relecloud				Jesse Homer	

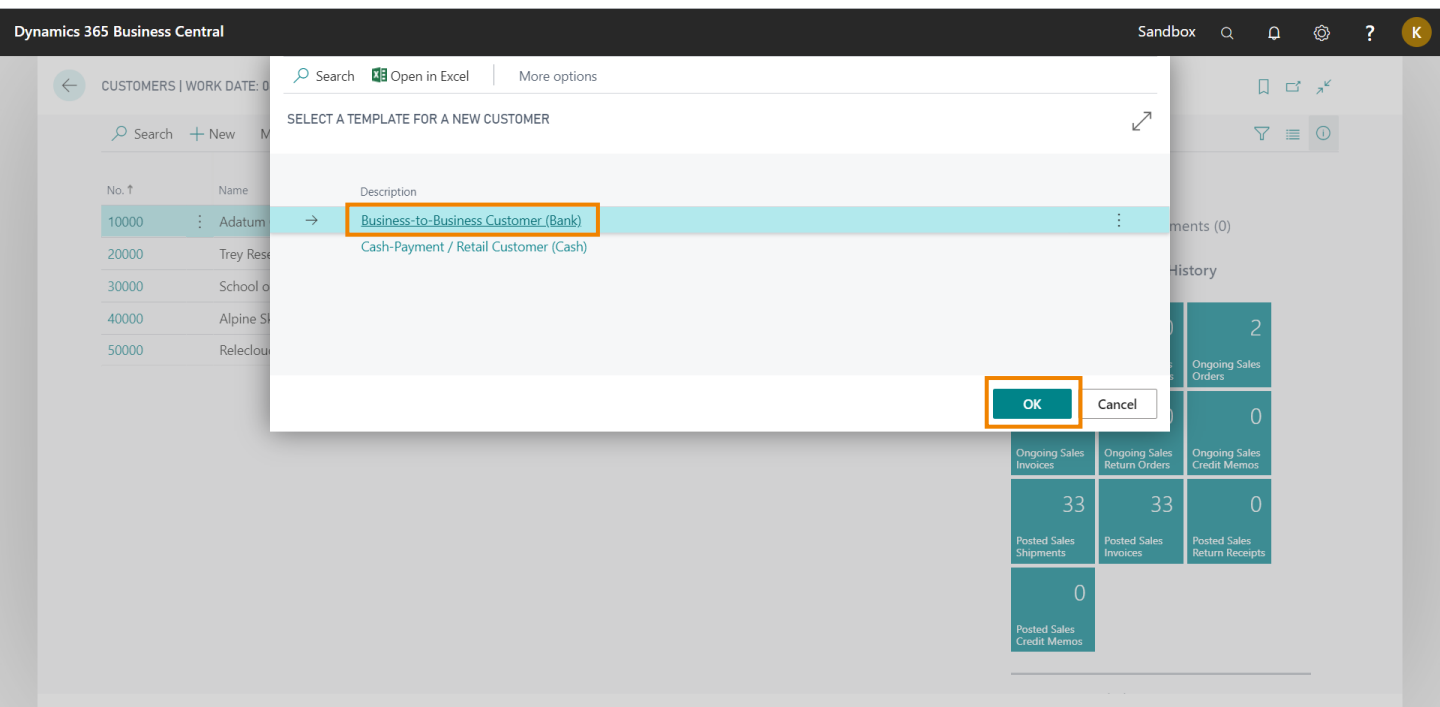
Details Attachments (0)

Sell-to Customer Sales History

0	0	2
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
2	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
33	33	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

User Perspective Scenario 1

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

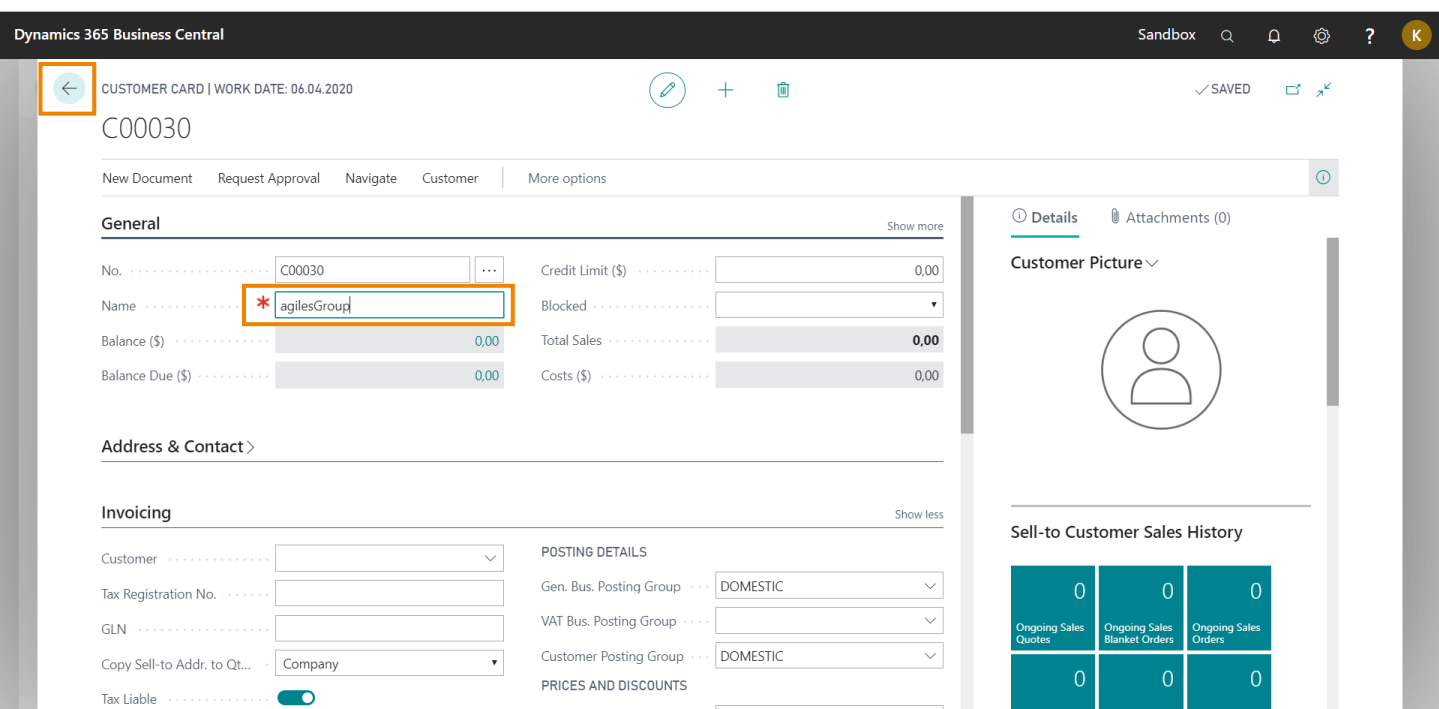


User Perspective Scenario 1

1) General:

Enter Name → e.g. **Aptean Group**

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



The screenshot shows the Dynamics 365 Business Central interface for a Customer Card. The card is for customer C00030, with a work date of 06.04.2020. The 'General' section is expanded, showing fields for No., Name, Balance (\$), Balance Due (\$), Credit Limit (\$), Blocked, Total Sales, and Costs (\$). The 'Name' field contains 'agilesGroup' and is highlighted with an orange box. The 'Address & Contact' and 'Invoicing' sections are also visible. The right-hand pane shows 'Details', 'Attachments (0)', 'Customer Picture', and 'Sell-to Customer Sales History'.

General Show more

No.	C00030	Credit Limit (\$)	0,00
Name	* agilesGroup	Blocked	
Balance (\$)	0,00	Total Sales	0,00
Balance Due (\$)	0,00	Costs (\$)	0,00

Address & Contact >

Invoicing Show less

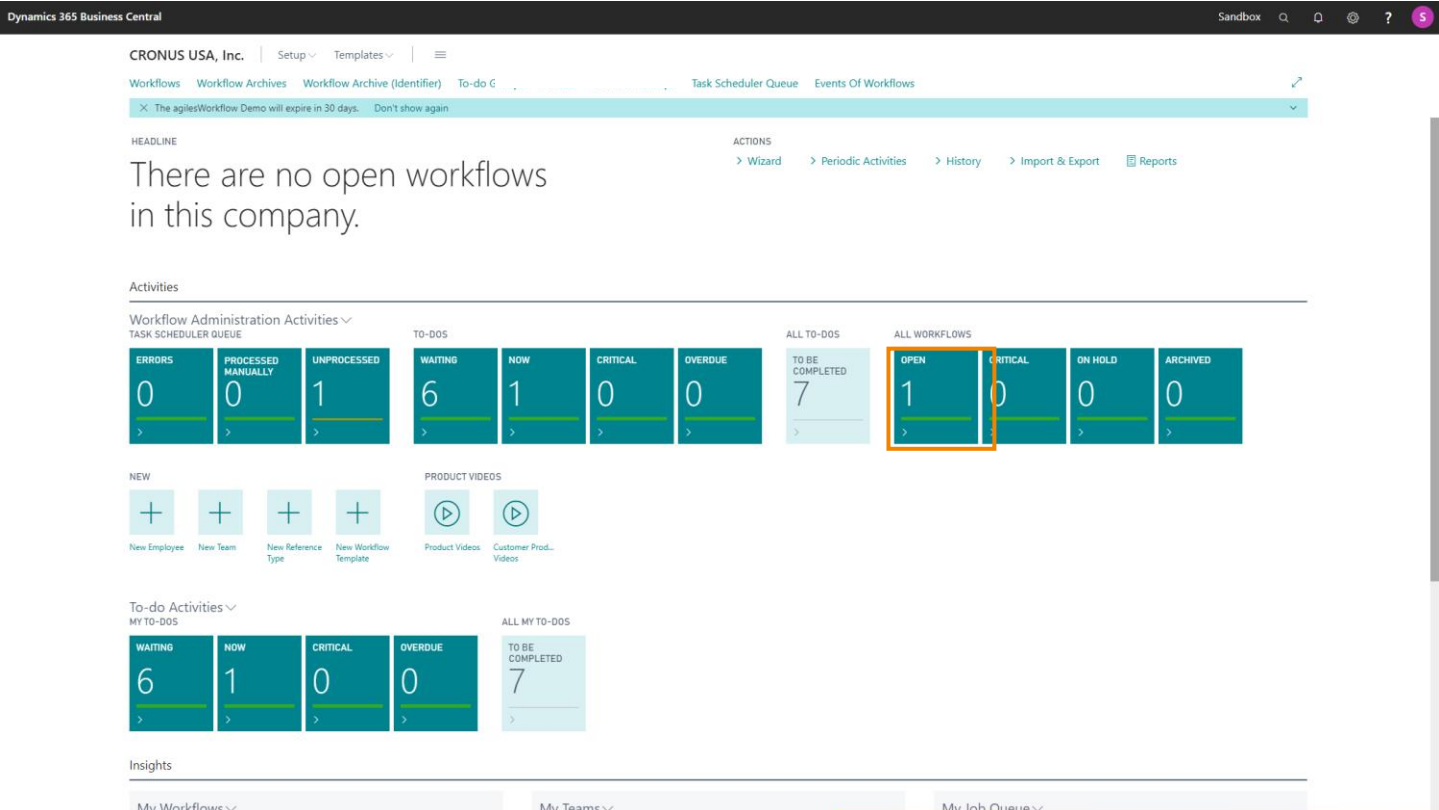
Customer		POSTING DETAILS	
Tax Registration No.		Gen. Bus. Posting Group	DOMESTIC
GLN		VAT Bus. Posting Group	
Copy Sell-to Addr. to Qt...	Company	Customer Posting Group	DOMESTIC
Tax Liabile	<input checked="" type="checkbox"/>	PRICES AND DISCOUNTS	

Sell-to Customer Sales History

0	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0

User Perspective Scenario 1

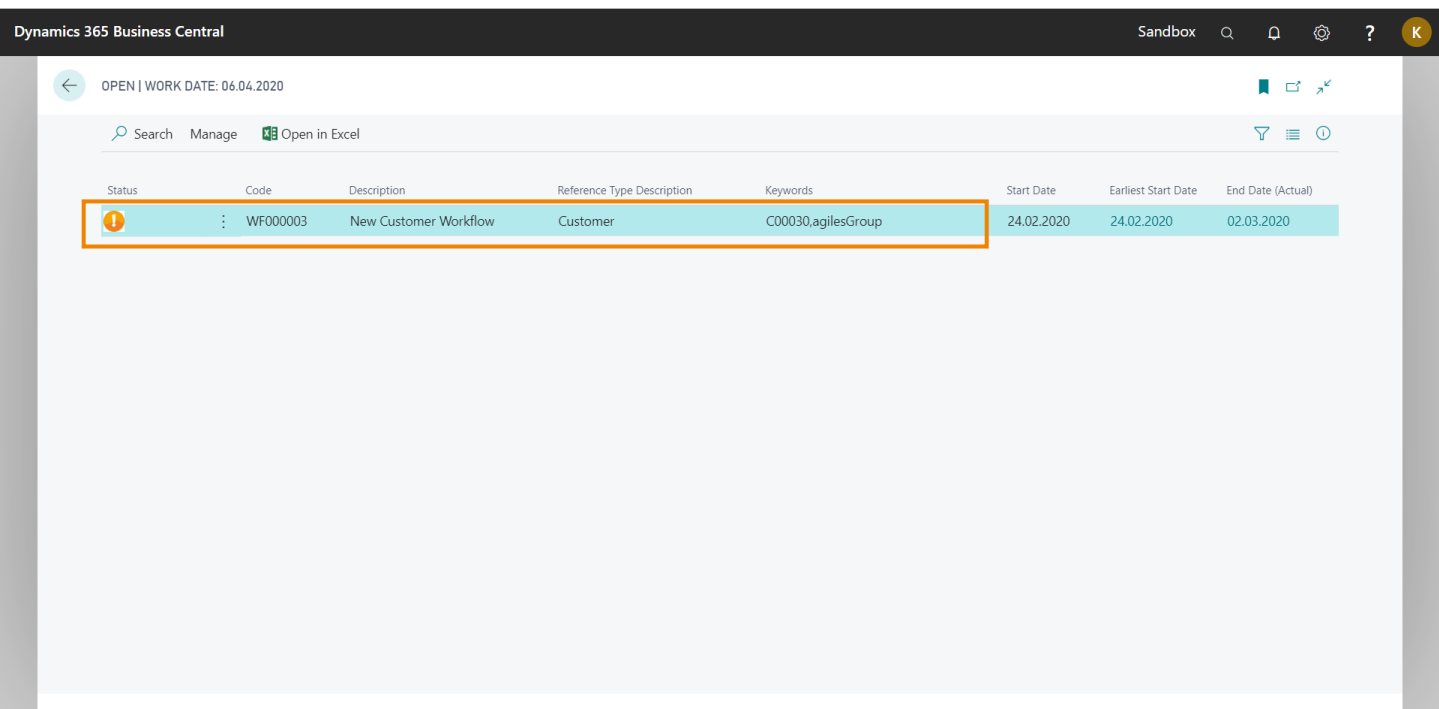
1) All Workflows: Click on Activity **Open**




The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The main heading reads 'There are no open workflows in this company.' Below this, there are several activity summary cards. The 'ALL WORKFLOWS' section contains four cards: 'OPEN' (1), 'CRITICAL' (0), 'ON HOLD' (0), and 'ARCHIVED' (0). The 'OPEN' card is highlighted with an orange border. Other sections include 'TASK SCHEDULER QUEUE' (Errors: 0, Processed Manually: 0, Unprocessed: 1), 'TO-DOS' (Waiting: 6, Now: 1, Critical: 0, Overdue: 0), and 'MY TO-DOS' (Waiting: 6, Now: 1, Critical: 0, Overdue: 0).

User Perspective Scenario 1

- 1) Show new created workflow

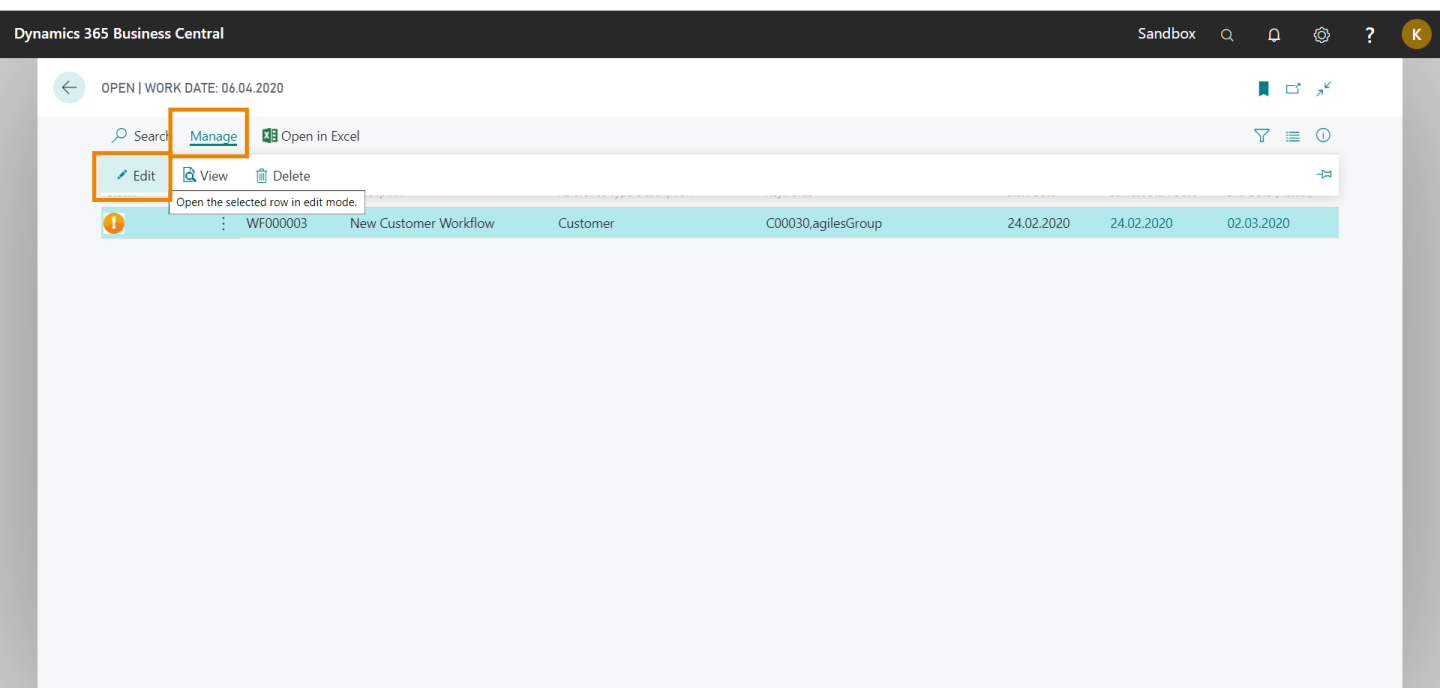


The screenshot shows the Dynamics 365 Business Central interface. At the top, it says "Dynamics 365 Business Central" on the left and "Sandbox" on the right. Below that, there's a navigation bar with "OPEN | WORK DATE: 06.04.2020" and some icons. The main area contains a table with the following columns: Status, Code, Description, Reference Type, Description, Keywords, Start Date, Earliest Start Date, and End Date (Actual). One row is highlighted with an orange border, containing the following data: Status (Warning icon), Code (WF000003), Description (New Customer Workflow), Reference Type (Customer), Description (C00030,agilesGroup), Start Date (24.02.2020), Earliest Start Date (24.02.2020), and End Date (Actual) (02.03.2020).

Status	Code	Description	Reference Type	Description	Keywords	Start Date	Earliest Start Date	End Date (Actual)
	WF000003	New Customer Workflow	Customer	C00030,agilesGroup		24.02.2020	24.02.2020	02.03.2020

User Perspective Scenario 1

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



User Perspective Scenario 1

- 1) Click on **Expanded View**

Dynamics 365 Business Central

Sandbox

WORKFLOW CARD | WORK DATE: 06.04.2020

WF000003 · New Customer Workflow

Status Update **Expanded View** Show Source More options

General Shows a structured overview of all added to-dos and to-do groups for that workflow. (Shift+Ctrl+N) Show more

Code WF000003 Identifier Archived

Description New Customer Workflow Start Date 24.02.2020

Reference Type Descripti... Customer Earliest Start Date 24.02.2020

Keywords C00030,agilesGroup End Date (Actual) 02.03.2020

Open Last Status Update On 24.02.2020

On Hold Last Status Update At 10:58:14

Workflow Details Attachments (0)

Template Code WF010

Workflow Group Code

No. Of Critical To-dos 0

No. Of Open To-dos 1

No. Of To-dos 7

Cause of Status To-dos 1

Status Name

Workflow Manage Line Fewer options

Type	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	→	25.02.2020	26.02.2020
To-do Group	WF000003-AG002	Department Checks	→	26.02.2020	28.02.2020

User Perspective Scenario 1

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

Dynamics 365 Business Central | Sandbox | Search | Notifications | Settings | Help | User

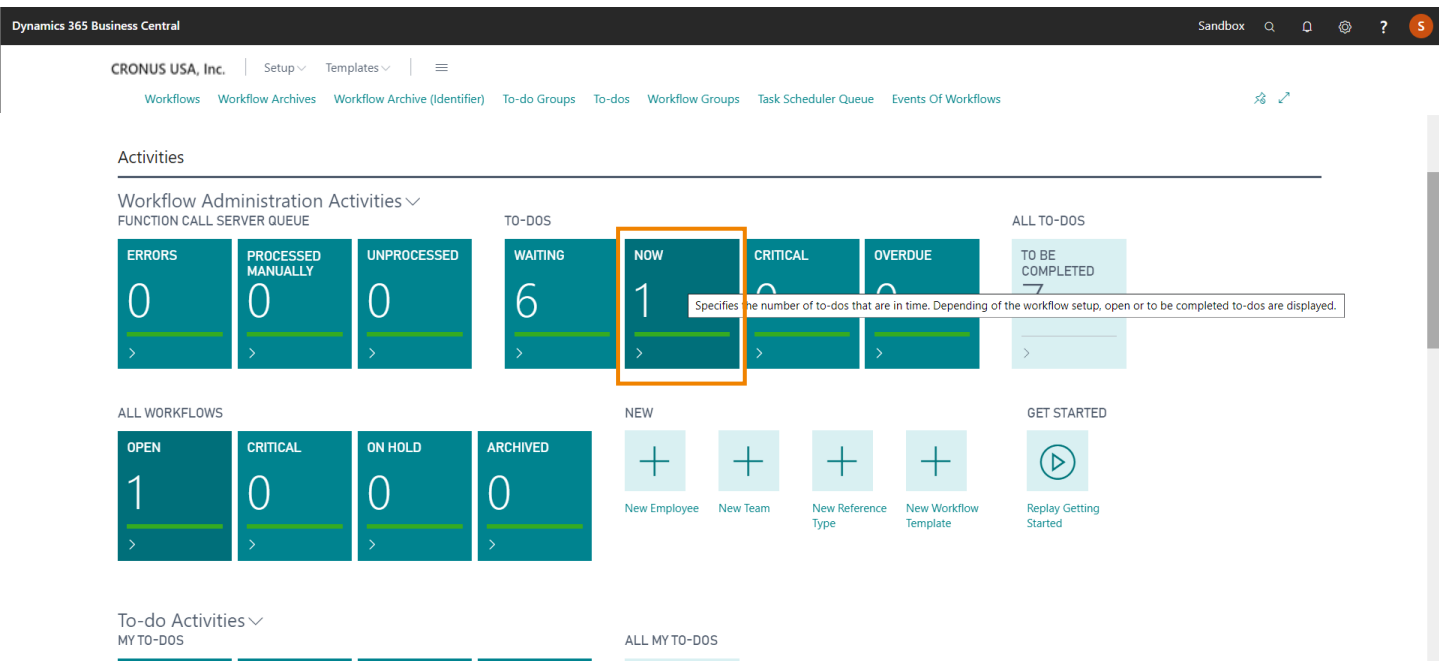
CUSTOMER WF000003 NEW CUSTOMER WORKFLOW - EXPANDED VIEW | WORK DATE: 06.04.2020

Show Source | Card | More options

Grouping	Status	Code	Description	Reference Type Description	Keywords	To-do Type	Team Code	Employee Code
1	!	WF000003-A...	New Customer Workflow	Customer	C00030,agilesGroup			
1.1	!	WF000003-A...	Check mandatory fields	Customer	C00030,agilesGroup	Field Examination		BA
1.2	➔	WF000003-A...	Attached Credit Application	Customer	C00030,agilesGroup	Manual Completion		AH
1.3	➔	WF000003-A...	Department Checks	Customer	C00030,agilesGroup			
1.3.1	➔	WF000003-A...	Review Dimension and Po...	Customer	C00030,agilesGroup	Manual Completion	FINANCE	
1.3.2	➔	WF000003-A...	Credit and Background Ch...	Customer	C00030,agilesGroup	Manual Completion	SALES	
1.3.3	➔	WF000003-A...	Setup Shipping Fields	Customer	C00030,agilesGroup	Manual Completion		AH
1.4	➔	WF000003-A...	Approve New Customer	Customer	C00030,agilesGroup	Manual Completion		AH
1.5	➔	WF000003-A...	Send Engagement Letter	Customer	C00030,agilesGroup	Manual Completion		BA

User Perspective Scenario 1

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

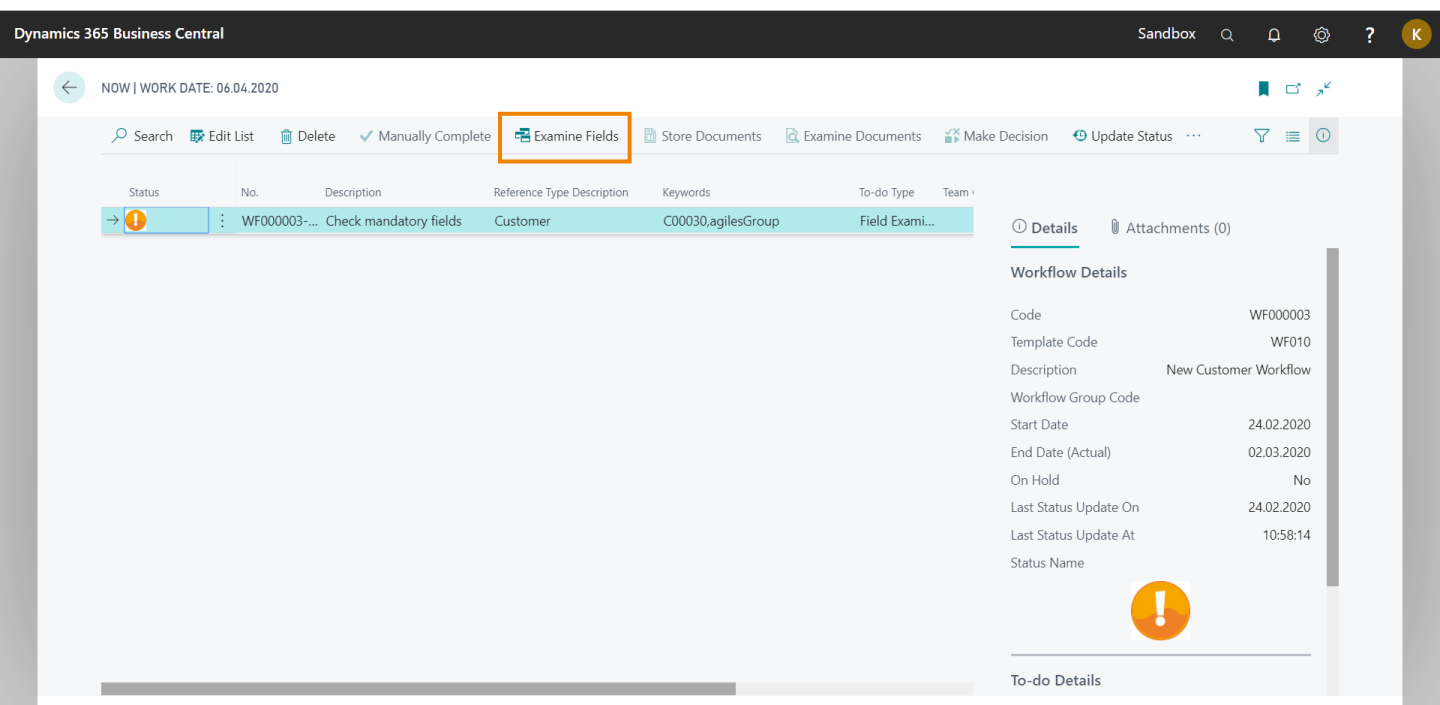


The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Dynamics 365 Business Central', 'Sandbox', and various icons. The main content area is titled 'CRONUS USA, Inc.' and contains several sections:

- Activities**: A section with a dropdown menu for 'Workflow Administration Activities'. Below it, there are several cards for 'FUNCTION CALL SERVER QUEUE' (ERRORS: 0, PROCESSED MANUALLY: 0, UNPROCESSED: 0) and 'TO-DOS' (WAITING: 6, NOW: 1, CRITICAL: 0, OVERDUE: 0). The 'NOW' card is highlighted with an orange box and has a tooltip that reads: 'Specifies the number of to-dos that are in time. Depending of the workflow setup, open or to be completed to-dos are displayed.'
- ALL WORKFLOWS**: A section with cards for OPEN (1), CRITICAL (0), ON HOLD (0), and ARCHIVED (0).
- NEW**: A section with buttons for 'New Employee', 'New Team', 'New Reference Type', and 'New Workflow Template'.
- GET STARTED**: A section with a 'Replay Getting Started' button.
- To-do Activities**: A section with a dropdown menu for 'MY TO-DOS' and 'ALL MY TO-DOS'.

User Perspective Scenario 1

- 1) Click on **Examine Fields**



User Perspective Scenario 1

1) Add a new Column → **Field Value**

Dynamics 365 Business Central

18 - WF010-C010 | ARBEITSDATUM: 06.04.2020

GESPEICHERT

Table Condition Line Status

Suchen Edit List Edit Open in Excel Weitere Optionen

Status	Table Description	Field Description	Filter	Field Value
→	<input checked="" type="checkbox"/> Customer	Name	<>*	agilesGroup
	<input checked="" type="checkbox"/> Customer	Customer Posting Group	<>*	DOMESTIC
	<input checked="" type="checkbox"/> Customer	Gen. Bus. Posting Group	<>*	DOMESTIC
	<input type="checkbox"/> Customer	VAT Bus. Posting Group	<>*	
	<input type="checkbox"/> Customer	Credit Limit (\$)	>0	0

User Perspective Scenario 1

- 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**

Dynamics 365 Business Central

Sandbox

18 - WF010-C010 | WORK DATE: 06.04.2020

✓ SAVED

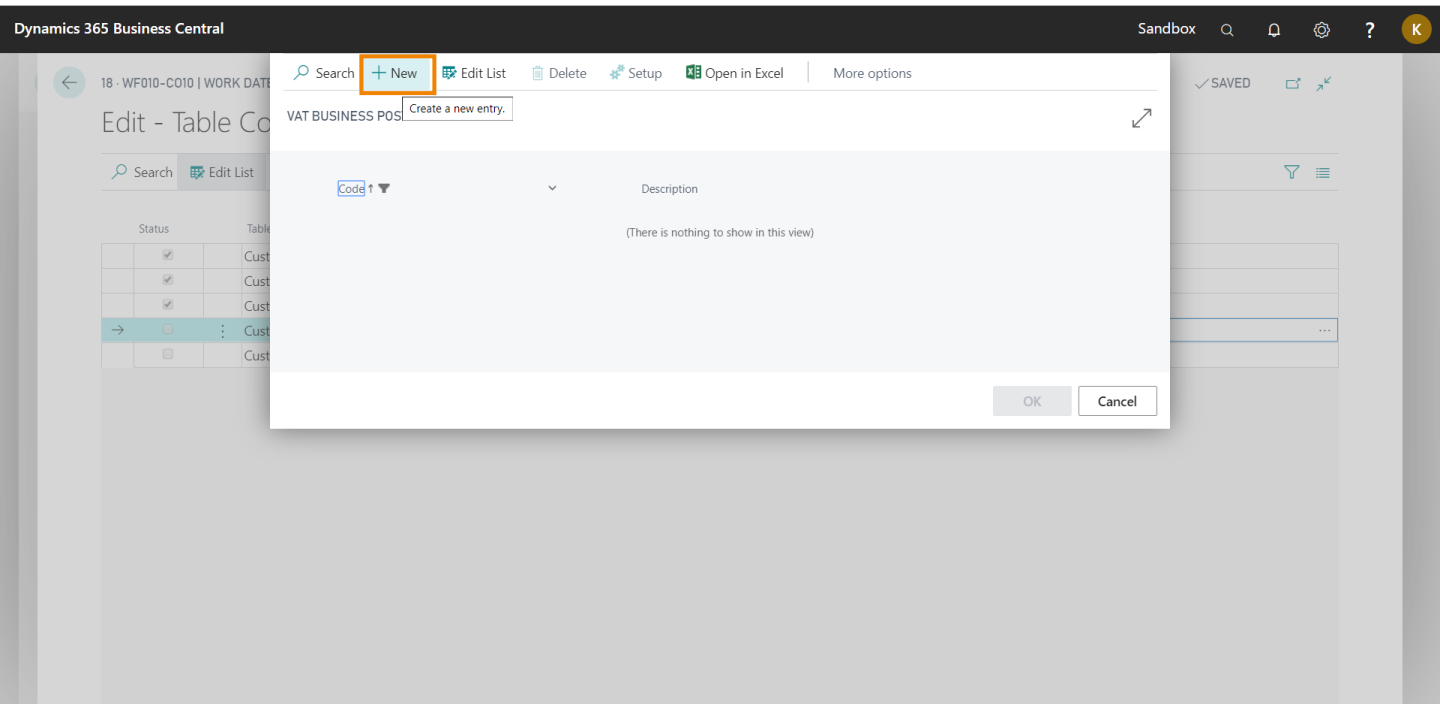
Table Condition Line Status

Search Edit List Edit Open in Excel More options

Status	Table Description	Field Description	Filter	Field Value
<input checked="" type="checkbox"/>	Customer	Name	<>"	agilesGroup
<input checked="" type="checkbox"/>	Customer	Customer Posting Group	<>"	DOMESTIC
<input checked="" type="checkbox"/>	Customer	Gen. Bus. Posting Group	<>"	DOMESTIC
<input type="checkbox"/>	Customer	VAT Bus. Posting Group	<>"	
<input type="checkbox"/>	Customer	Credit Limit (\$)	>0	0

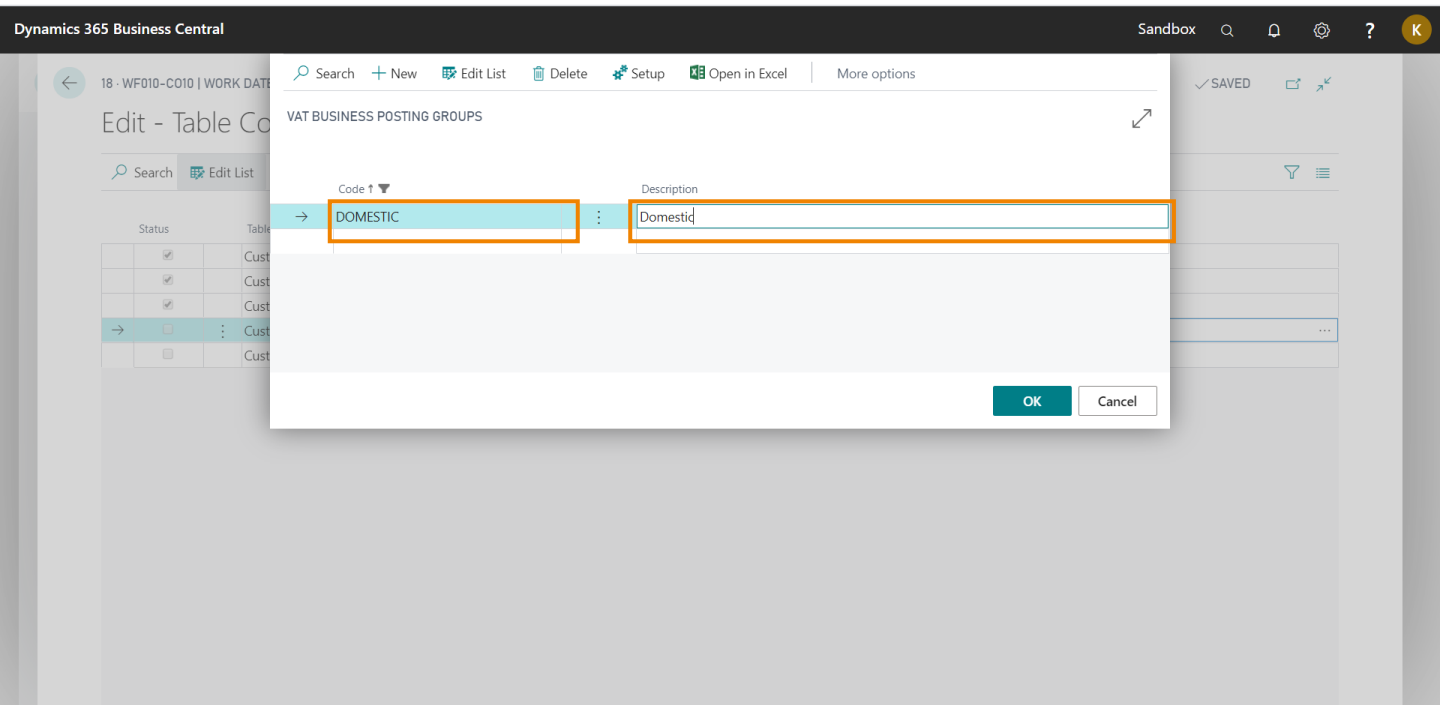
User Perspective Scenario 1

- 1) Click on **+New**



User Perspective Scenario 1

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



User Perspective Scenario 1

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

Dynamics 365 Business Central

Sandbox

18 - WF010-C010 | WORK DATE: 06.04.2020

SAVED

Table Condition Line Status

Search Edit List Edit Open in Excel More options

Status	Table Description	Field Description	Filter	Field Value
<input checked="" type="checkbox"/>	Customer	Name	<>"	agilesGroup
<input checked="" type="checkbox"/>	Customer	Customer Posting Group	<>"	DOMESTIC
<input checked="" type="checkbox"/>	Customer	Gen. Bus. Posting Group	<>"	DOMESTIC
<input checked="" type="checkbox"/>	Customer	VAT Bus. Posting Group	<>"	DOMESTIC
<input type="checkbox"/>	Customer	Credit Limit (\$)	>0	0 Look up value

User Perspective Scenario 1

1) Fifth line: Enter Field Value → 10

Dynamics 365 Business Central | Sandbox | 18 - WF010-C010 | WORK DATE: 06.04.2020

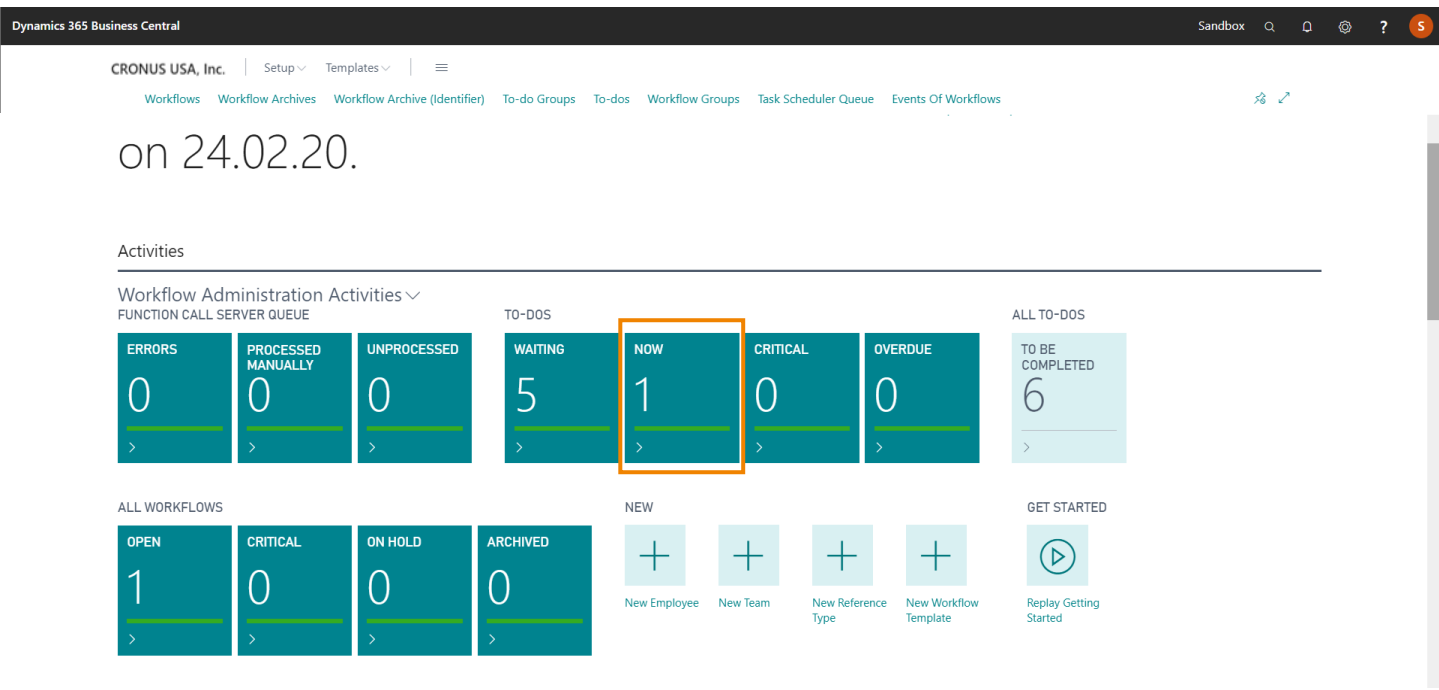
Table Condition Line Status

Search | Edit List | Edit | Open in Excel | More options

Status	Table Description	Field Description	Filter	Field Value
<input checked="" type="checkbox"/>	Customer	Name	<>"	agilesGroup
<input checked="" type="checkbox"/>	Customer	Customer Posting Group	<>"	DOMESTIC
<input checked="" type="checkbox"/>	Customer	Gen. Bus. Posting Group	<>"	DOMESTIC
<input checked="" type="checkbox"/>	Customer	VAT Bus. Posting Group	<>"	DOMESTIC
→ <input checked="" type="checkbox"/>	: Customer	Credit Limit (\$)	>0	10

User Perspective Scenario 1

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



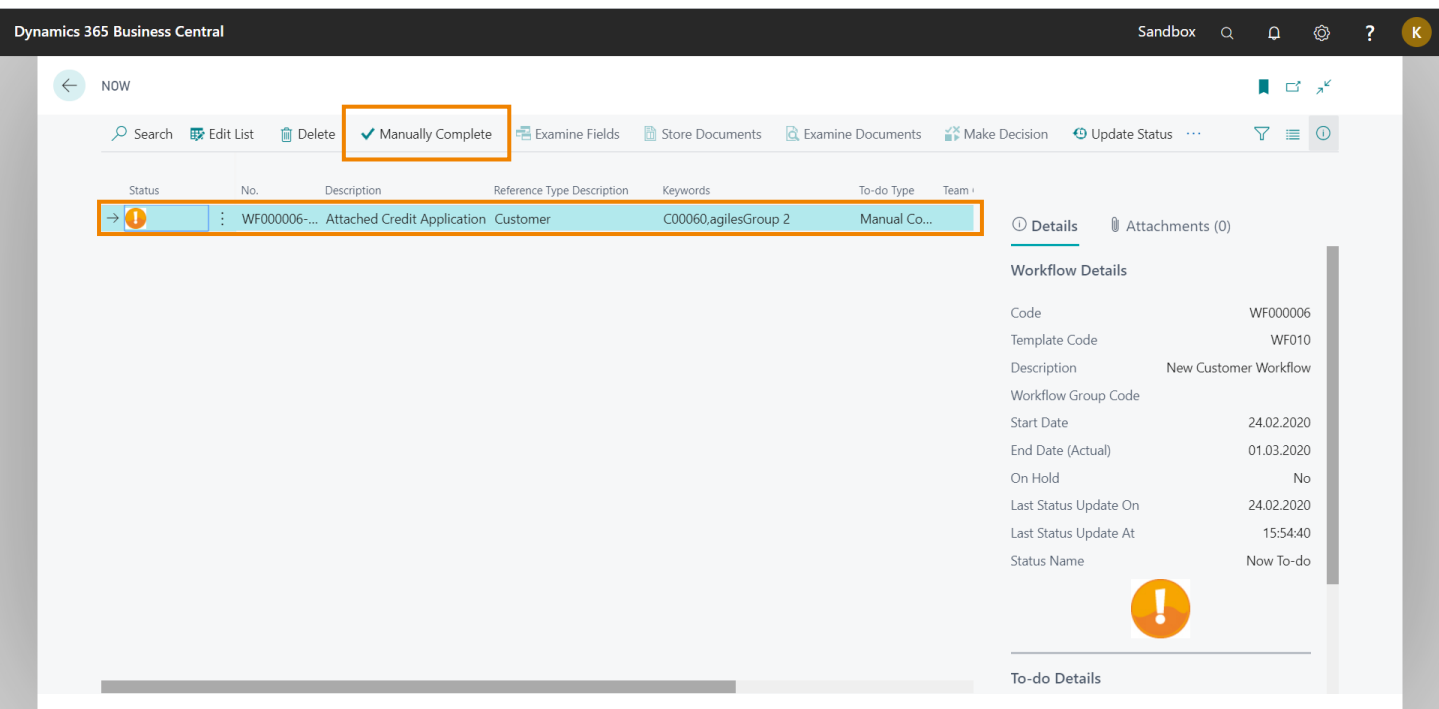
The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes "Dynamics 365 Business Central" on the left and "Sandbox" with search and navigation icons on the right. Below the header, the user's organization "CRONUS USA, Inc." is displayed, along with navigation menus for "Setup", "Templates", and a hamburger menu. A breadcrumb trail shows the current path: "Workflows > Workflow Archives > Workflow Archive (Identifier) > To-do Groups > To-dos > Workflow Groups > Task Scheduler Queue > Events Of Workflows".

The main content area displays the date "on 24.02.20." and a section titled "Activities". Under "Activities", there is a sub-section "Workflow Administration Activities" with a dropdown arrow. Below this, a "FUNCTION CALL SERVER QUEUE" is shown. The "TO-DOS" section contains several activity cards: "ERRORS" (0), "PROCESSED MANUALLY" (0), "UNPROCESSED" (0), "WAITING" (5), "NOW" (1), "CRITICAL" (0), "OVERDUE" (0), and "TO BE COMPLETED" (6). The "NOW" card is highlighted with an orange border. Below the "TO-DOS" section, there are "ALL WORKFLOWS" (OPEN: 1, CRITICAL: 0, ON HOLD: 0, ARCHIVED: 0) and "NEW" actions (New Employee, New Team, New Reference Type, New Workflow Template) and a "GET STARTED" button (Replay Getting Started).

User Perspective Scenario 1

To close the To-do:

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



The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes 'Dynamics 365 Business Central', 'Sandbox', and user initials 'K'. The main area displays a list of workflow items. One item is highlighted with a blue selection bar and an orange border: 'WF000006-...' with description 'Attached Credit Application', reference type 'Customer', keywords 'C00060,agilesGroup 2', and to-do type 'Manual Co...'. The 'Manually Complete' button in the action bar above this item is highlighted with an orange box. To the right, the 'Details' pane shows workflow information: Code (WF000006), Template Code (WF010), Description (New Customer Workflow), Workflow Group Code, Start Date (24.02.2020), End Date (Actual) (01.03.2020), On Hold (No), Last Status Update On (24.02.2020), Last Status Update At (15:54:40), and Status Name (Now To-do). A red warning icon is visible at the bottom of the details pane.

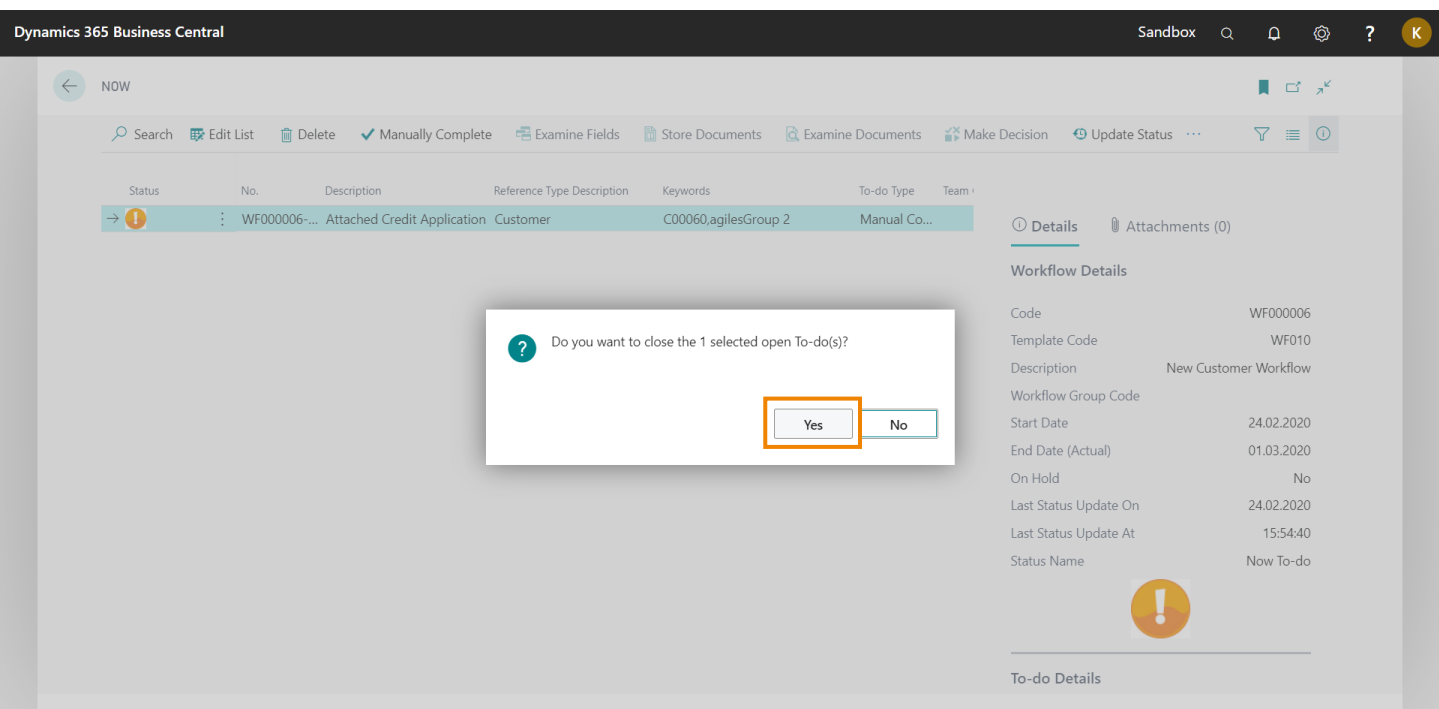
Status	No.	Description	Reference Type	Description	Keywords	To-do Type	Team
→ !	WF000006-...	Attached Credit Application	Customer		C00060,agilesGroup 2	Manual Co...	

Workflow Details

Code	WF000006
Template Code	WF010
Description	New Customer Workflow
Workflow Group Code	
Start Date	24.02.2020
End Date (Actual)	01.03.2020
On Hold	No
Last Status Update On	24.02.2020
Last Status Update At	15:54:40
Status Name	Now To-do

User Perspective Scenario 1

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



The screenshot displays the Dynamics 365 Business Central user interface. At the top, the header shows "Dynamics 365 Business Central" on the left and "Sandbox" with search, notification, and user icons on the right. Below the header is a navigation bar with a "NOW" view selector and a toolbar containing icons for Search, Edit List, Delete, Manually Complete, Examine Fields, Store Documents, Examine Documents, Make Decision, and Update Status. A table below the toolbar lists workflow items with columns for Status, No., Description, Reference Type Description, Keywords, To-do Type, and Team. One item is highlighted in blue: "WF000006-... Attached Credit Application Customer C00060,agilesGroup 2 Manual Co...".

A modal dialog box is centered on the screen, asking: "Do you want to close the 1 selected open To-do(s)?". The dialog has a question mark icon and two buttons: "Yes" and "No". The "Yes" button is highlighted with an orange border.

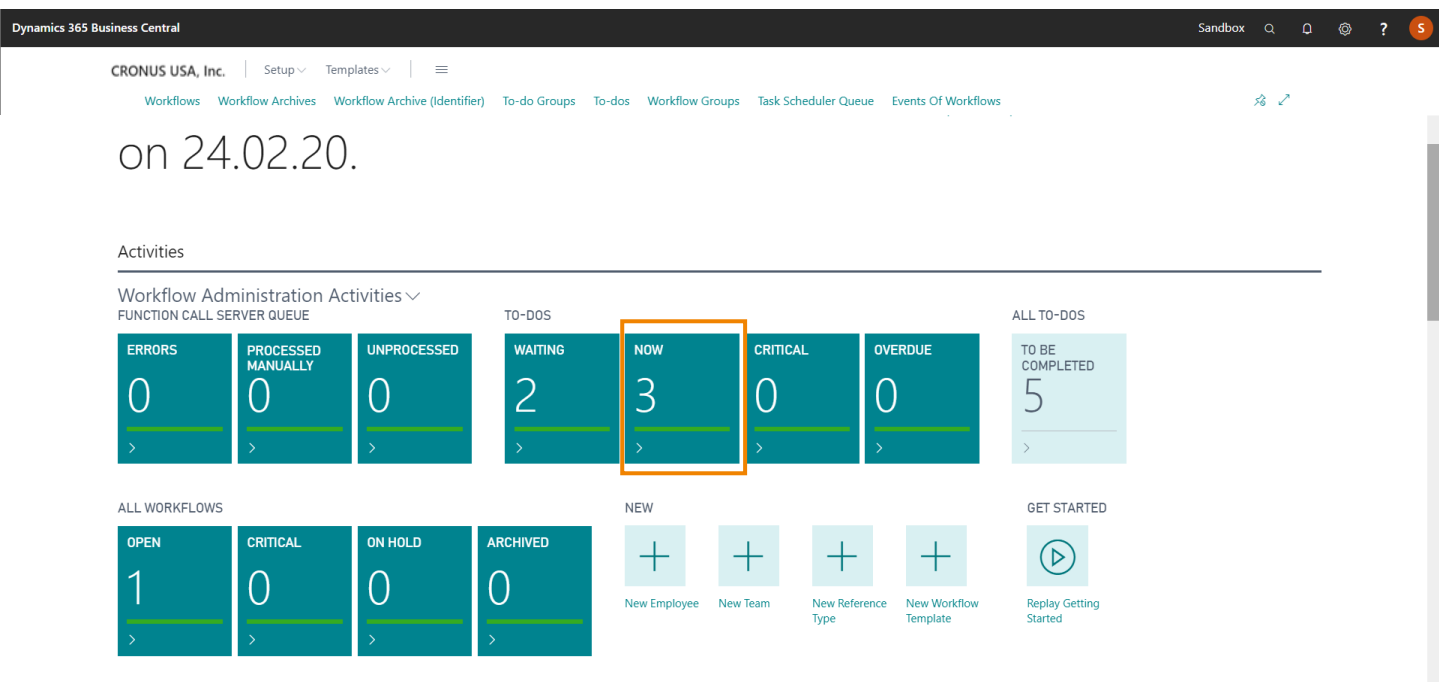
On the right side of the interface, the "Details" pane is visible, showing "Workflow Details" for the selected item. The details include:

Field	Value
Code	WF000006
Template Code	WF010
Description	New Customer Workflow
Workflow Group Code	
Start Date	24.02.2020
End Date (Actual)	01.03.2020
On Hold	No
Last Status Update On	24.02.2020
Last Status Update At	15:54:40
Status Name	Now To-do

Below the details pane, there is a red warning icon and a section for "To-do Details".

User Perspective Scenario 1

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

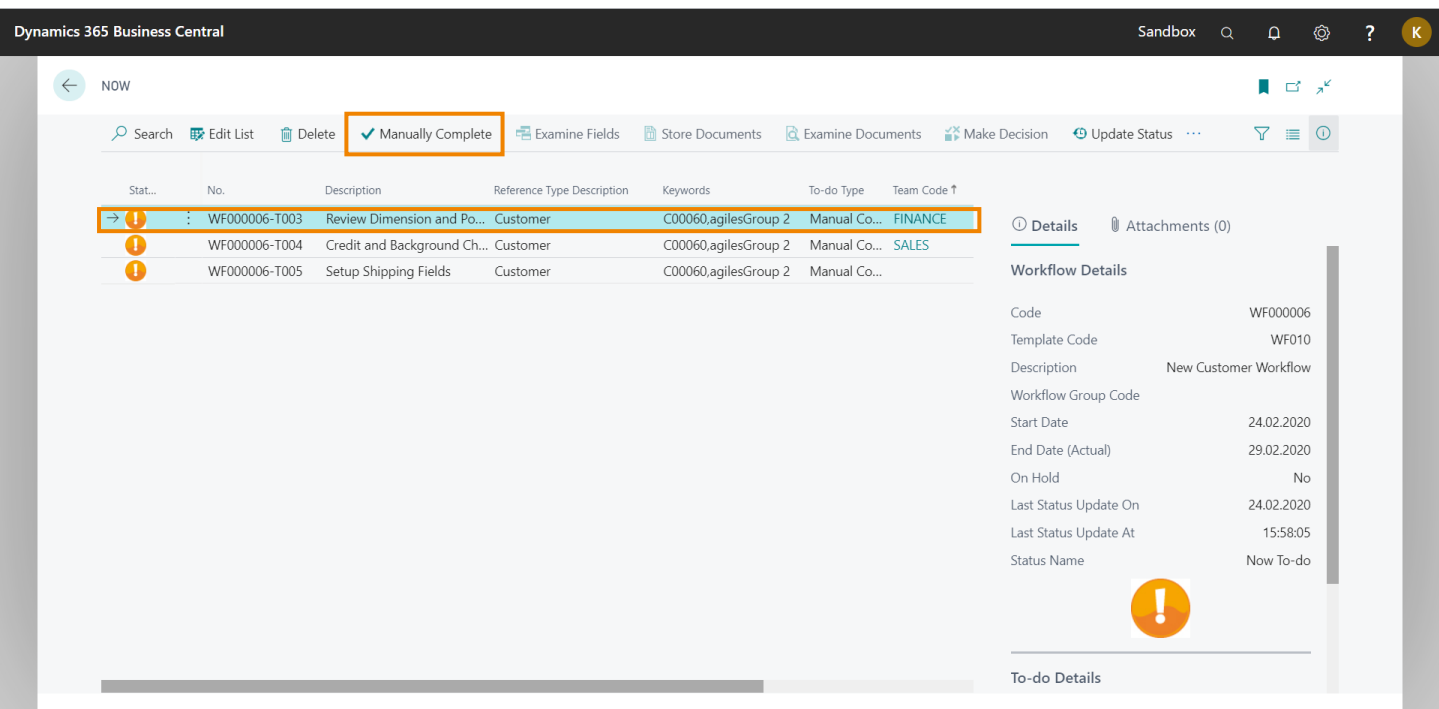


The screenshot shows the Dynamics 365 Business Central interface. At the top, the breadcrumb navigation includes 'Workflows', 'Workflow Archives', 'Workflow Archive (Identifier)', 'To-do Groups', 'To-dos', 'Workflow Groups', 'Task Scheduler Queue', and 'Events Of Workflows'. The main content area displays a 'TO-DOS' section with several activity cards. The 'NOW' card, which has a value of 3, is highlighted with an orange border. Other activity cards include 'WAITING' (2), 'CRITICAL' (0), 'OVERDUE' (0), and 'TO BE COMPLETED' (5). Below the 'TO-DOS' section, there are 'ALL WORKFLOWS' and 'NEW' sections. The 'ALL WORKFLOWS' section includes 'OPEN' (1), 'CRITICAL' (0), 'ON HOLD' (0), and 'ARCHIVED' (0). The 'NEW' section includes 'New Employee', 'New Team', 'New Reference Type', and 'New Workflow Template'. A 'GET STARTED' section with a 'Replay Getting Started' button is also visible.

Activity Category	Activity Name	Count
TO-DOS	WAITING	2
	NOW	3
	CRITICAL	0
	OVERDUE	0
	TO BE COMPLETED	5
ALL WORKFLOWS	OPEN	1
	CRITICAL	0
	ON HOLD	0
	ARCHIVED	0
NEW	New Employee	+
	New Team	+
	New Reference Type	+
	New Workflow Template	+
GET STARTED	Replay Getting Started	▶

User Perspective Scenario 1

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



The screenshot shows the Dynamics 365 Business Central interface. At the top, the navigation bar includes 'NOW' and various utility icons. Below the navigation bar is a toolbar with several action buttons: 'Search', 'Edit List', 'Delete', 'Manually Complete' (highlighted with an orange box), 'Examine Fields', 'Store Documents', 'Examine Documents', 'Make Decision', and 'Update Status'. Below the toolbar is a table of To-do items:

Stat...	No.	Description	Reference Type	Description	Keywords	To-do Type	Team Code
→ !	WF000006-T003	Review Dimension and Po...	Customer		C00060,agilesGroup 2	Manual Co...	FINANCE
!	WF000006-T004	Credit and Background Ch...	Customer		C00060,agilesGroup 2	Manual Co...	SALES
!	WF000006-T005	Setup Shipping Fields	Customer		C00060,agilesGroup 2	Manual Co...	

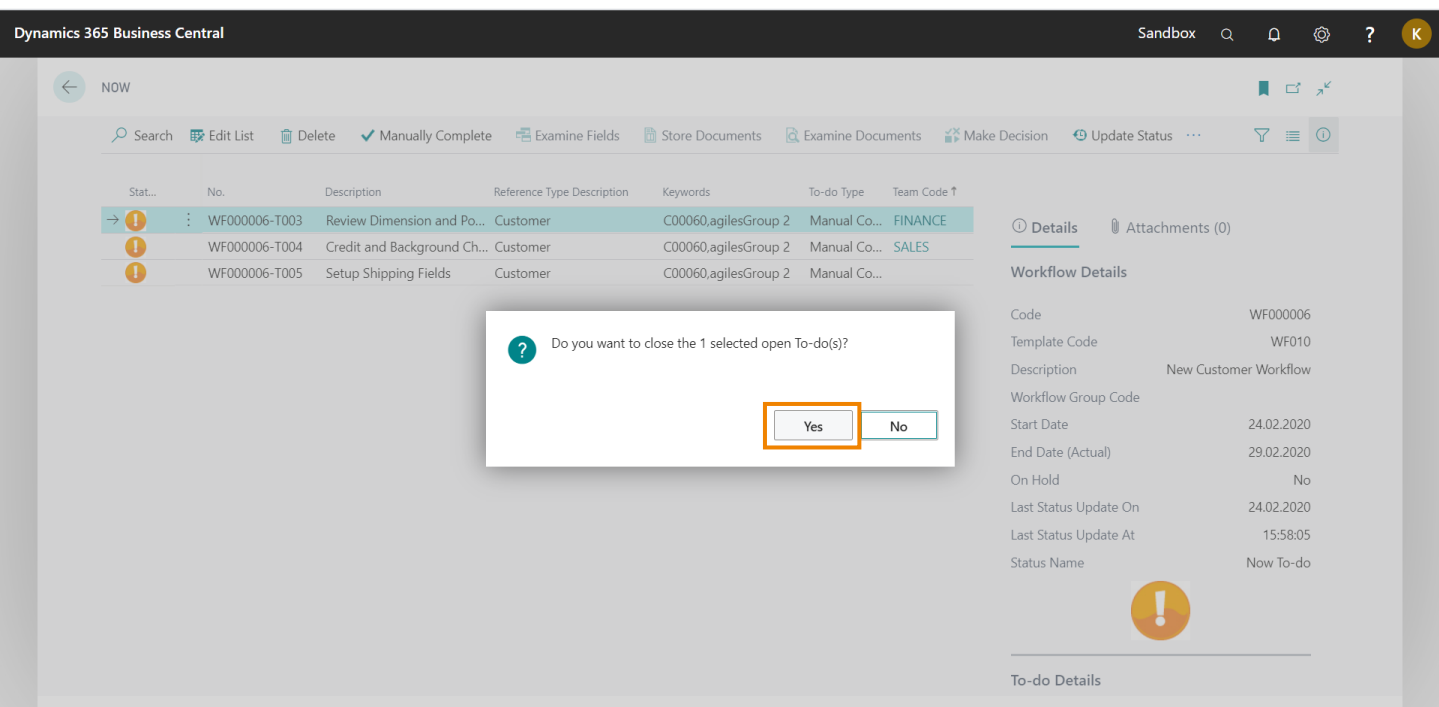
On the right side of the interface, there is a 'Details' pane for the selected To-do item. It shows 'Workflow Details' with the following information:

- Code: WF000006
- Template Code: WF010
- Description: New Customer Workflow
- Workflow Group Code: [blank]
- 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

Below the 'Workflow Details' pane, there is a 'To-do Details' section which is currently empty. A large orange warning icon is visible at the bottom of the details pane.

User Perspective Scenario 1

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



The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows "Dynamics 365 Business Central" on the left and "Sandbox" with search, notification, and user icons on the right. Below the header is a navigation bar with a "NOW" button and several utility icons. The main area features a table of workflow items:

Stat...	No.	Description	Reference Type Description	Keywords	To-do Type	Team Code ↑
→ !	WF000006-T003	Review Dimension and Po...	Customer	C00060,agilesGroup 2	Manual Co...	FINANCE
!	WF000006-T004	Credit and Background Ch...	Customer	C00060,agilesGroup 2	Manual Co...	SALES
!	WF000006-T005	Setup Shipping Fields	Customer	C00060,agilesGroup 2	Manual Co...	

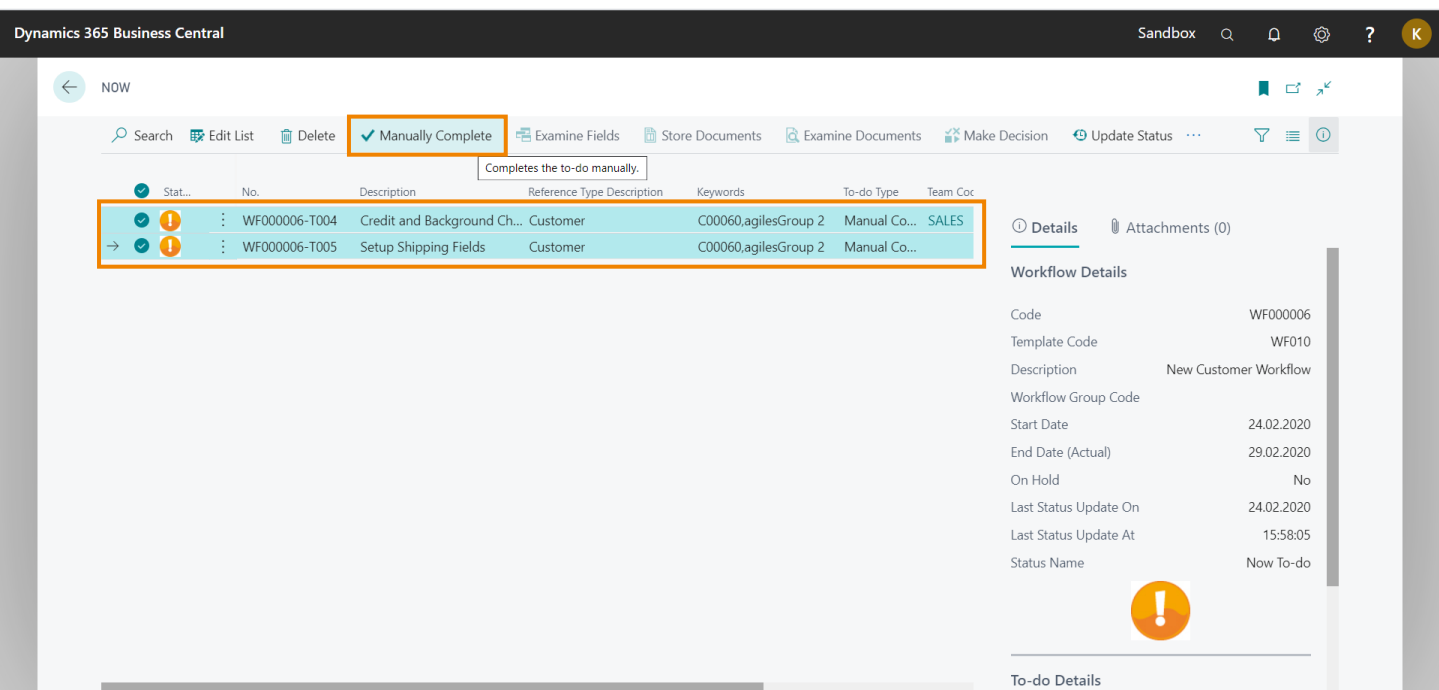
A confirmation dialog box is overlaid on the table, asking: "Do you want to close the 1 selected open To-do(s)?" The "Yes" button is highlighted with an orange border. To the right of the dialog is a "Workflow Details" panel with the following information:

Code	WF000006
Template Code	WF010
Description	New Customer 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

Below the details panel is a "To-do Details" section with a warning icon.

User Perspective Scenario 1

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



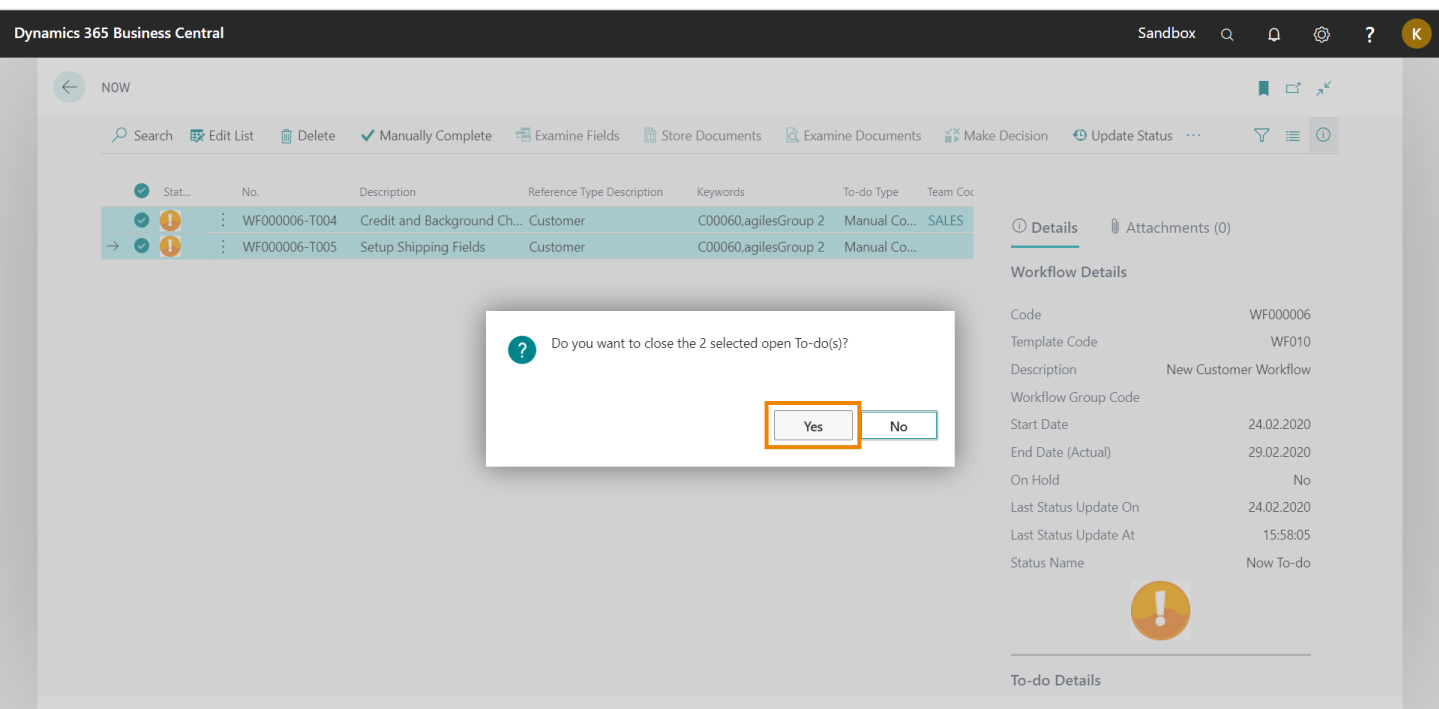
The screenshot shows the Dynamics 365 Business Central interface. At the top, the navigation bar includes 'NOW', 'Sandbox', and various utility icons. Below the navigation bar, a toolbar contains several action buttons: 'Search', 'Edit List', 'Delete', 'Manually Complete' (highlighted with an orange box), 'Examine Fields', 'Store Documents', 'Examine Documents', 'Make Decision', and 'Update Status'. A tooltip for the 'Manually Complete' button reads 'Completes the to-do manually.'. Below the toolbar is a table with the following columns: 'Stat...', 'No.', 'Description', 'Reference Type Description', 'Keywords', 'To-do Type', and 'Team Co.'. Two rows are visible, both highlighted with an orange box:

Stat...	No.	Description	Reference Type Description	Keywords	To-do Type	Team Co.
✓ !	WF000006-T004	Credit and Background Ch...	Customer	C00060.agilesGroup 2	Manual Co...	SALES
→ ✓ !	WF000006-T005	Setup Shipping Fields	Customer	C00060.agilesGroup 2	Manual Co...	

Below the table, the 'Details' pane is visible, showing 'Workflow Details' for the selected item. The details include: Code (WF000006), Template Code (WF010), Description (New Customer 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), and Status Name (Now To-do). A warning icon is present at the bottom of the details pane.

User Perspective Scenario 1

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



The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes "Dynamics 365 Business Central" on the left and "Sandbox" with search, notification, and user icons on the right. Below the header is a navigation bar with a "NOW" button and several action icons. The main area displays a table of workflow items:

Stat...	No.	Description	Reference Type Description	Keywords	To-do Type	Team Co...
✓	WF000006-T004	Credit and Background Ch...	Customer	C00060.agilesGroup 2	Manual Co...	SALES
→ ✓	WF000006-T005	Setup Shipping Fields	Customer	C00060.agilesGroup 2	Manual Co...	

A confirmation dialog box is centered on the screen, asking: "Do you want to close the 2 selected open To-do(s)?" The "Yes" button is highlighted with an orange border. To the right of the dialog, the "Workflow Details" panel is visible, showing information for the selected workflow:

Workflow Details

- Code: WF000006
- Template Code: WF010
- Description: New Customer 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

Below the details, there is a red warning icon and a "To-do Details" section.

User Perspective Scenario 1

1) To-Dos: Click on Activity **Now**

Dynamics 365 Business Central

CRONUS USA, Inc. | Setup | Templates

Workflows | Workflow Archives | Workflow Archive (Identifier) | To-do Groups | To-dos | Workflow Groups | Task Scheduler Queue | Events Of Workflows

Activities

Workflow Administration Activities

FUNCTION CALL SERVER QUEUE

ERRORS 0	PROCESSED MANUALLY 0	UNPROCESSED 0	WAITING 1	NOW 1	CRITICAL 0	OVERDUE 0	ALL TO-DOS TO BE COMPLETED 2
-------------	-------------------------	------------------	--------------	------------------	---------------	--------------	------------------------------------

ALL WORKFLOWS

OPEN 1	CRITICAL 0	ON HOLD 0	ARCHIVED 0
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NEW

New Employee	New Team	New Reference Type	New Workflow Template
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GET STARTED

Replay Getting Started

To-do Activities

MY TO-DOS

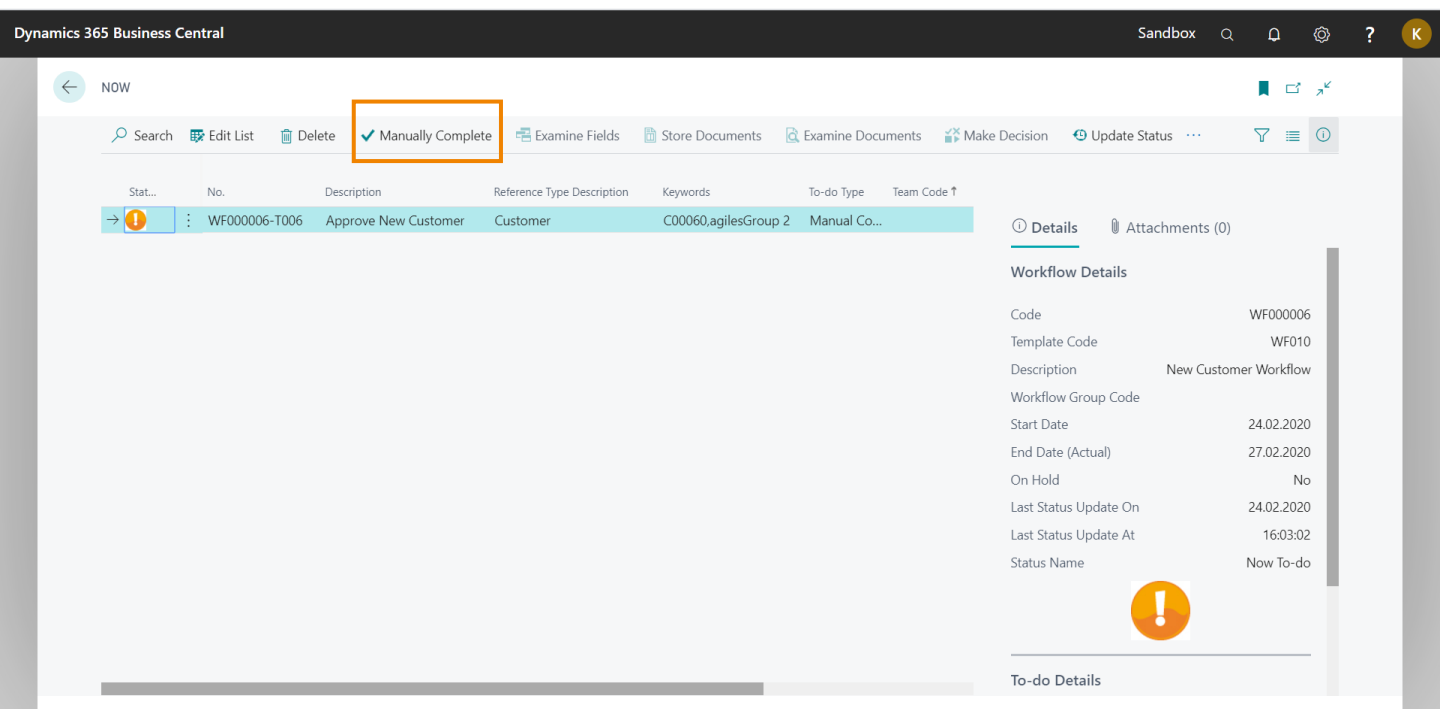
WAITING	NOW	CRITICAL	OVERDUE
---------	------------	----------	---------

ALL MY TO-DOS

TO BE

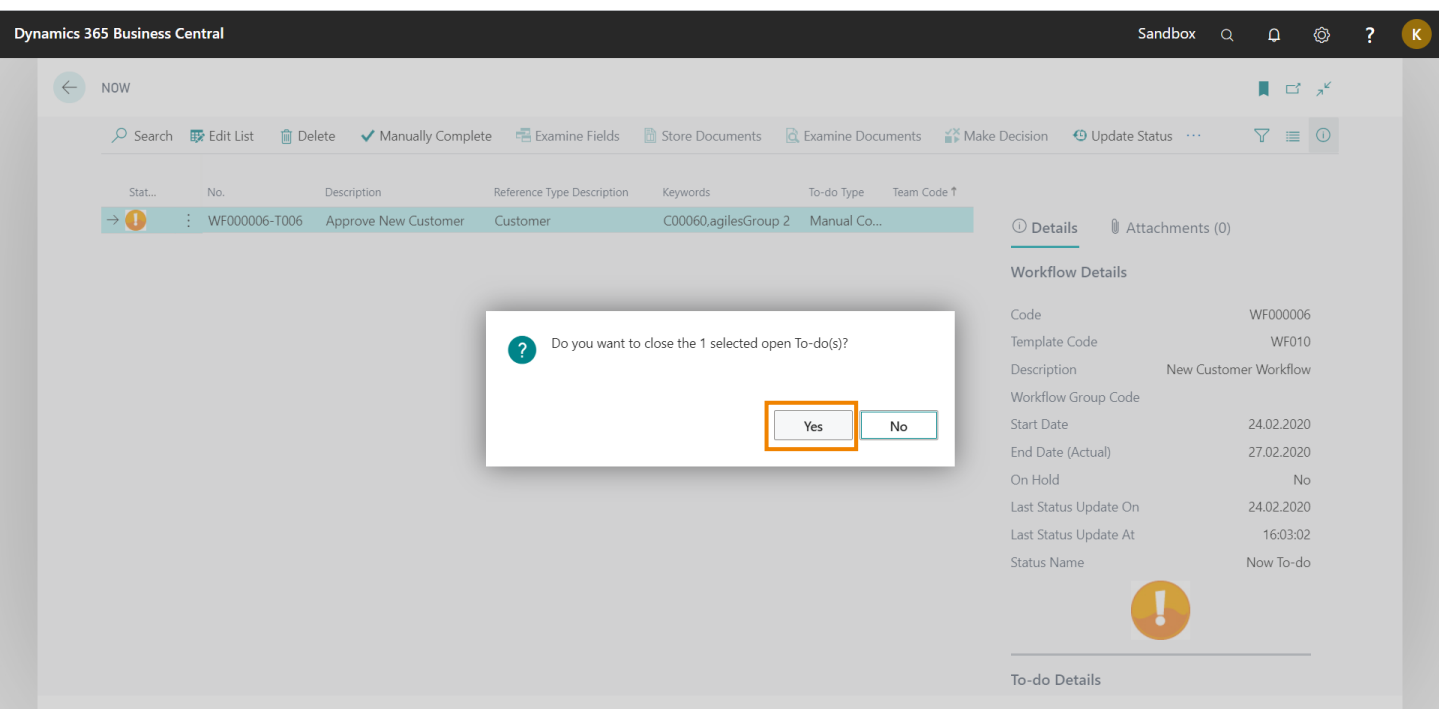
User Perspective Scenario 1

- 1) Click on **Manually Complete**



User Perspective Scenario 1

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



The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows "Dynamics 365 Business Central" on the left and "Sandbox" with search, notification, and user icons on the right. Below the header is a navigation bar with a "NOW" view selector and a toolbar containing icons for search, edit, delete, manually complete, examine fields, store documents, examine documents, make decision, and update status. A table lists workflow items with columns for status, number, description, reference type, keywords, and team code. One item is selected: WF000006-T006, "Approve New Customer", "Customer", "C00060,agilesGroup 2", "Manual Co...". A confirmation dialog box is overlaid on the table, asking "Do you want to close the 1 selected open To-do(s)?" with "Yes" and "No" buttons. The "Yes" button is highlighted with an orange border. To the right of the table, the "Details" pane shows workflow information: Code (WF000006), Template Code (WF010), Description (New Customer Workflow), Workflow Group Code, Start Date (24.02.2020), End Date (Actual) (27.02.2020), On Hold (No), Last Status Update On (24.02.2020), Last Status Update At (16:03:02), and Status Name (Now To-do). A warning icon is visible at the bottom of the details pane.

Stat...	No.	Description	Reference Type	Description	Keywords	To-do Type	Team Code
→ ⓘ	WF000006-T006	Approve New Customer	Customer		C00060,agilesGroup 2	Manual Co...	

Do you want to close the 1 selected open To-do(s)?

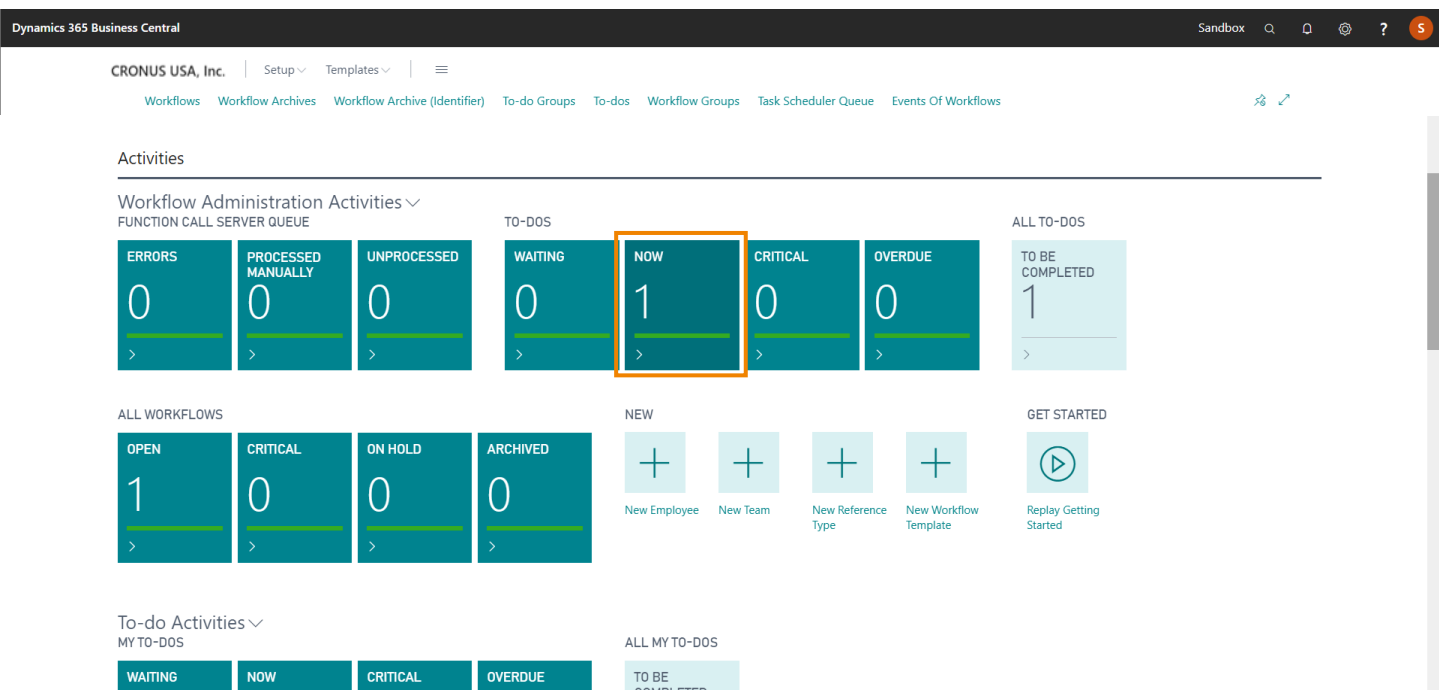
Workflow Details

Code	WF000006
Template Code	WF010
Description	New Customer Workflow
Workflow Group Code	
Start Date	24.02.2020
End Date (Actual)	27.02.2020
On Hold	No
Last Status Update On	24.02.2020
Last Status Update At	16:03:02
Status Name	Now To-do

To-do Details

User Perspective Scenario 1

1) To-Dos: Click on Activity **Now**

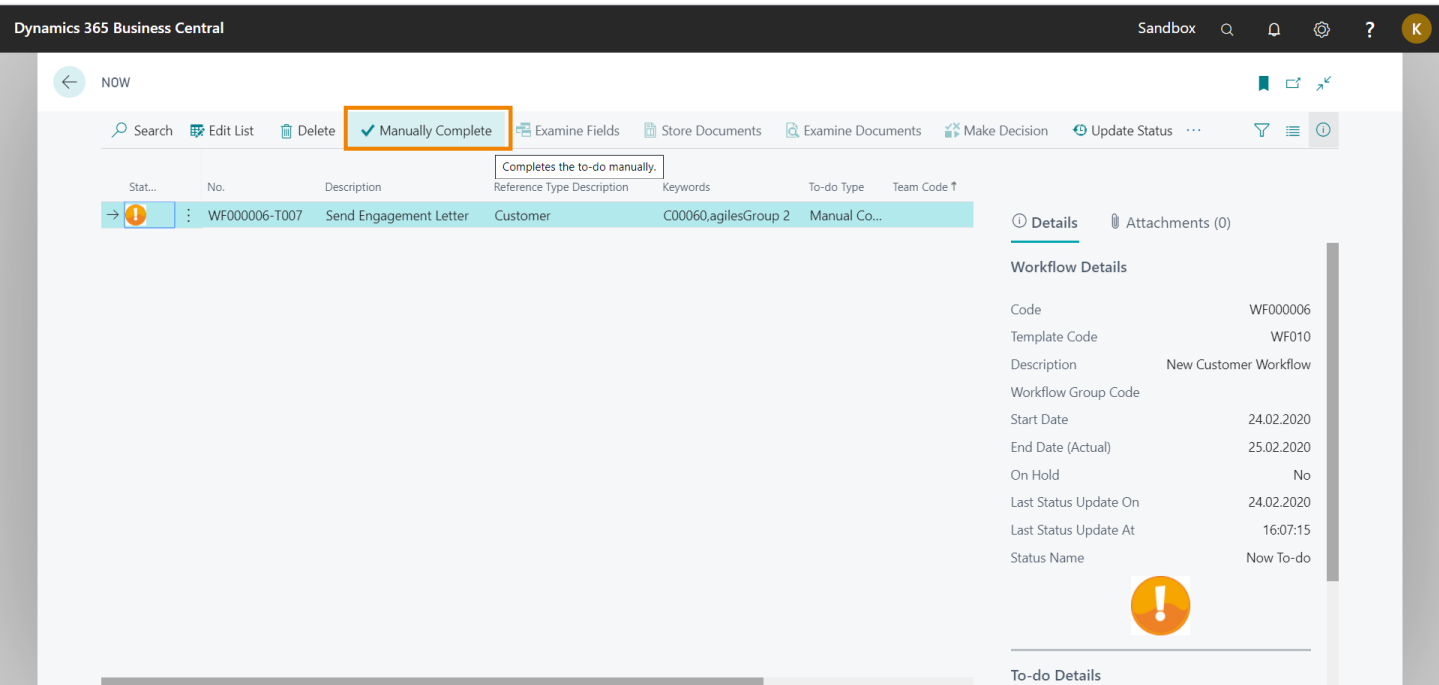


The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The top navigation bar includes 'Setup', 'Templates', and a menu icon. Below the navigation bar, a breadcrumb trail shows 'Workflows' > 'Workflow Archives' > 'Workflow Archive (Identifier)' > 'To-do Groups' > 'To-dos' > 'Workflow Groups' > 'Task Scheduler Queue' > 'Events Of Workflows'. The main content area is titled 'Activities' and is divided into several sections:

- Workflow Administration Activities** (FUNCTION CALL SERVER QUEUE): This section contains seven activity cards: 'ERRORS' (0), 'PROCESSED MANUALLY' (0), 'UNPROCESSED' (0), 'WAITING' (0), 'NOW' (1), 'CRITICAL' (0), and 'OVERDUE' (0). The 'NOW' card is highlighted with an orange border.
- ALL TO-DOS**: A card showing 'TO BE COMPLETED' (1).
- ALL WORKFLOWS**: This section contains four activity cards: 'OPEN' (1), 'CRITICAL' (0), 'ON HOLD' (0), and 'ARCHIVED' (0).
- NEW**: This section contains four activity cards with plus signs: 'New Employee', 'New Team', 'New Reference Type', and 'New Workflow Template'.
- GET STARTED**: A card with a play button icon labeled 'Replay Getting Started'.
- To-do Activities** (MY TO-DOS): This section contains four activity cards: 'WAITING', 'NOW', 'CRITICAL', and 'OVERDUE'.
- ALL MY TO-DOS**: A card with a play button icon labeled 'TO BE COMPLETED'.

User Perspective Scenario 1

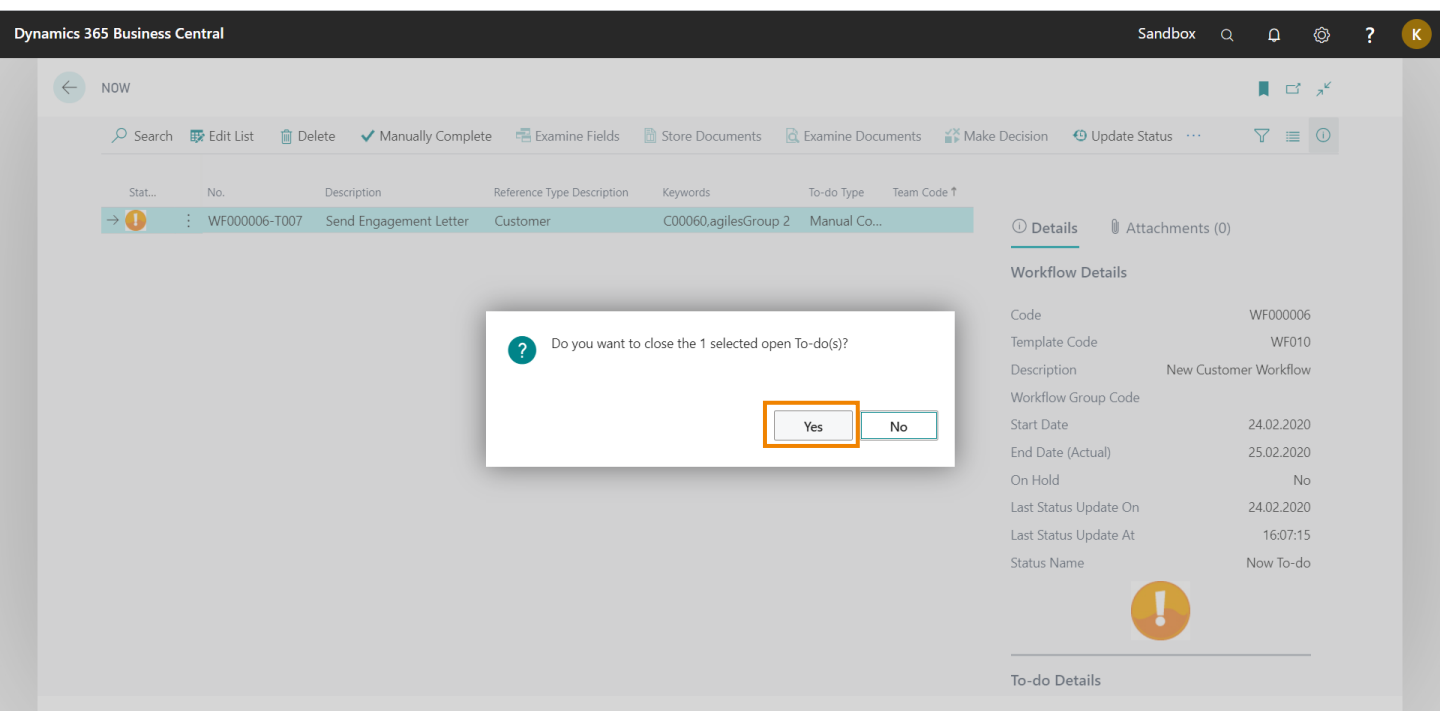
- 1) Click on **Manually Complete**



The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' on the left and 'Sandbox' with search, notification, and user icons on the right. Below the header, a navigation bar contains a back arrow, the text 'NOW', and several action buttons: 'Search', 'Edit List', 'Delete', 'Manually Complete' (highlighted with an orange box), 'Examine Fields', 'Store Documents', 'Examine Documents', 'Make Decision', and 'Update Status'. A tooltip above the 'Manually Complete' button reads 'Completes the to-do manually...'. Below the navigation bar is a table with columns: 'Stat...', 'No.', 'Description', 'Reference Type Description', 'Keywords', 'To-do Type', and 'Team Code ↑'. A single row is visible with the following data: 'WF000006-T007', 'Send Engagement Letter', 'Customer', 'C00060,agilesGroup 2', and 'Manual Co...'. To the right of the table, there are sections for 'Details' and 'Attachments (0)'. The 'Workflow Details' section lists: Code (WF000006), Template Code (WF010), Description (New Customer Workflow), Workflow Group Code, 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), and Status Name (Now To-do). A large orange warning icon is positioned below the 'Workflow Details' section. At the bottom of the interface, there is a 'To-do Details' section.

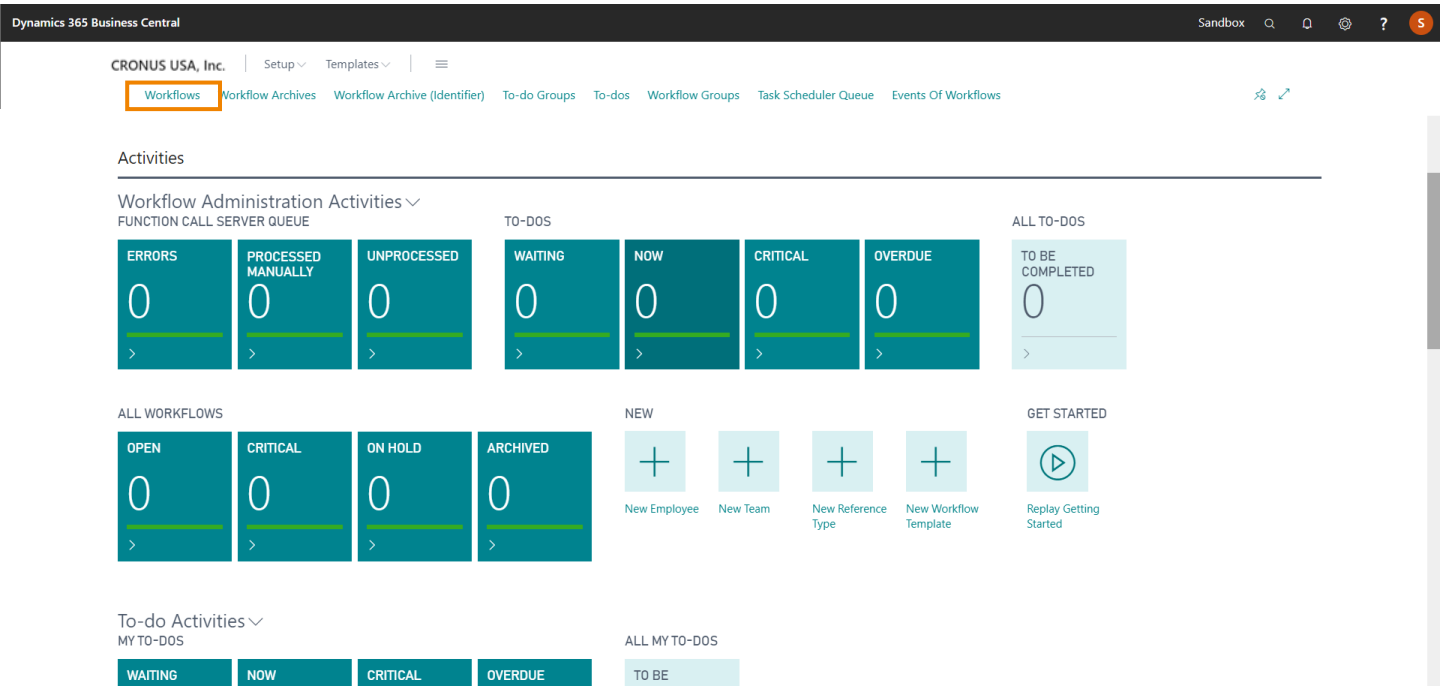
User Perspective Scenario 1

- 1) Click **Yes**



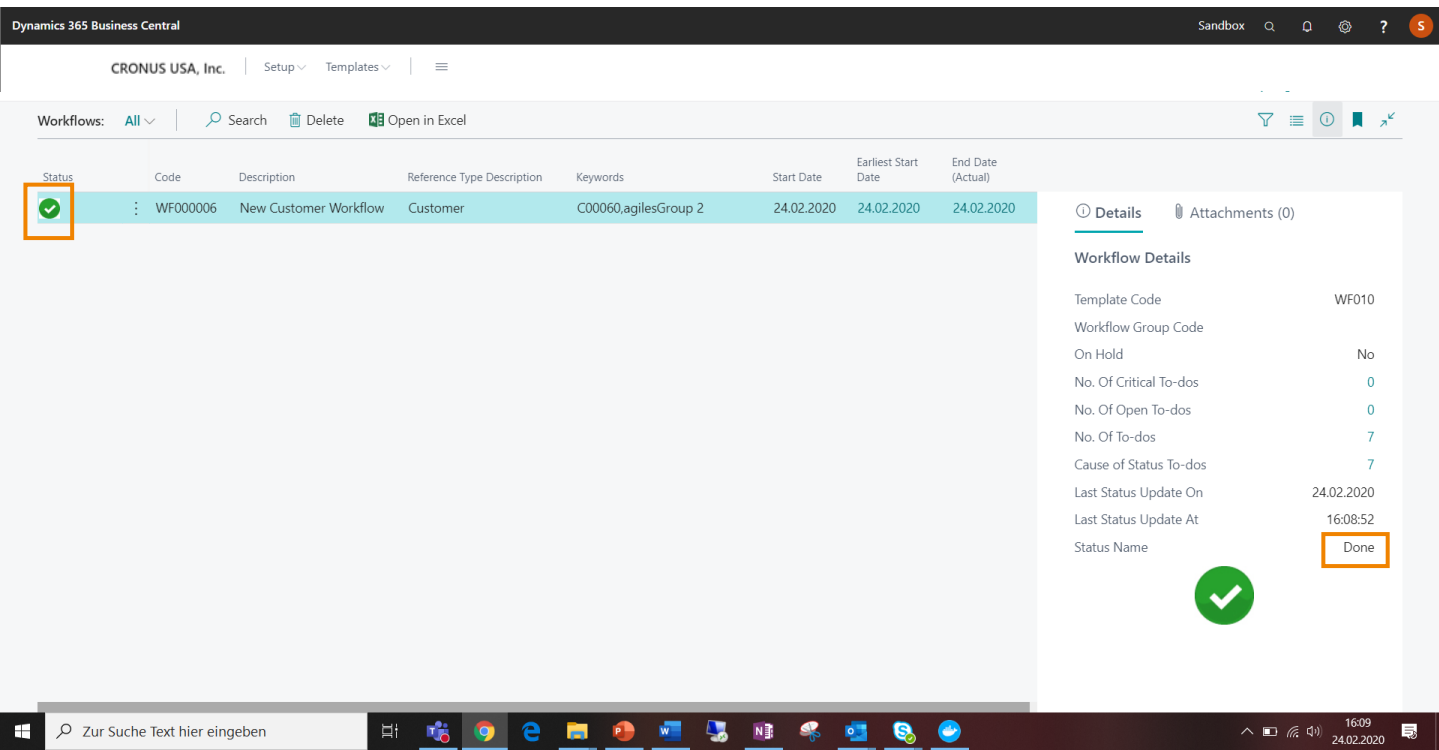
User Perspective Scenario 1

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



User Perspective Scenario 1

1) Workflow is done



The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The main area shows a list of workflows. The first workflow, 'New Customer Workflow' (Code: WF000006), is highlighted in light blue. Its status is 'Done', indicated by a green checkmark icon in a box. The workflow details panel on the right shows the following information:

Field	Value
Template Code	WF010
Workflow Group Code	
On Hold	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	16:08:52
Status Name	Done

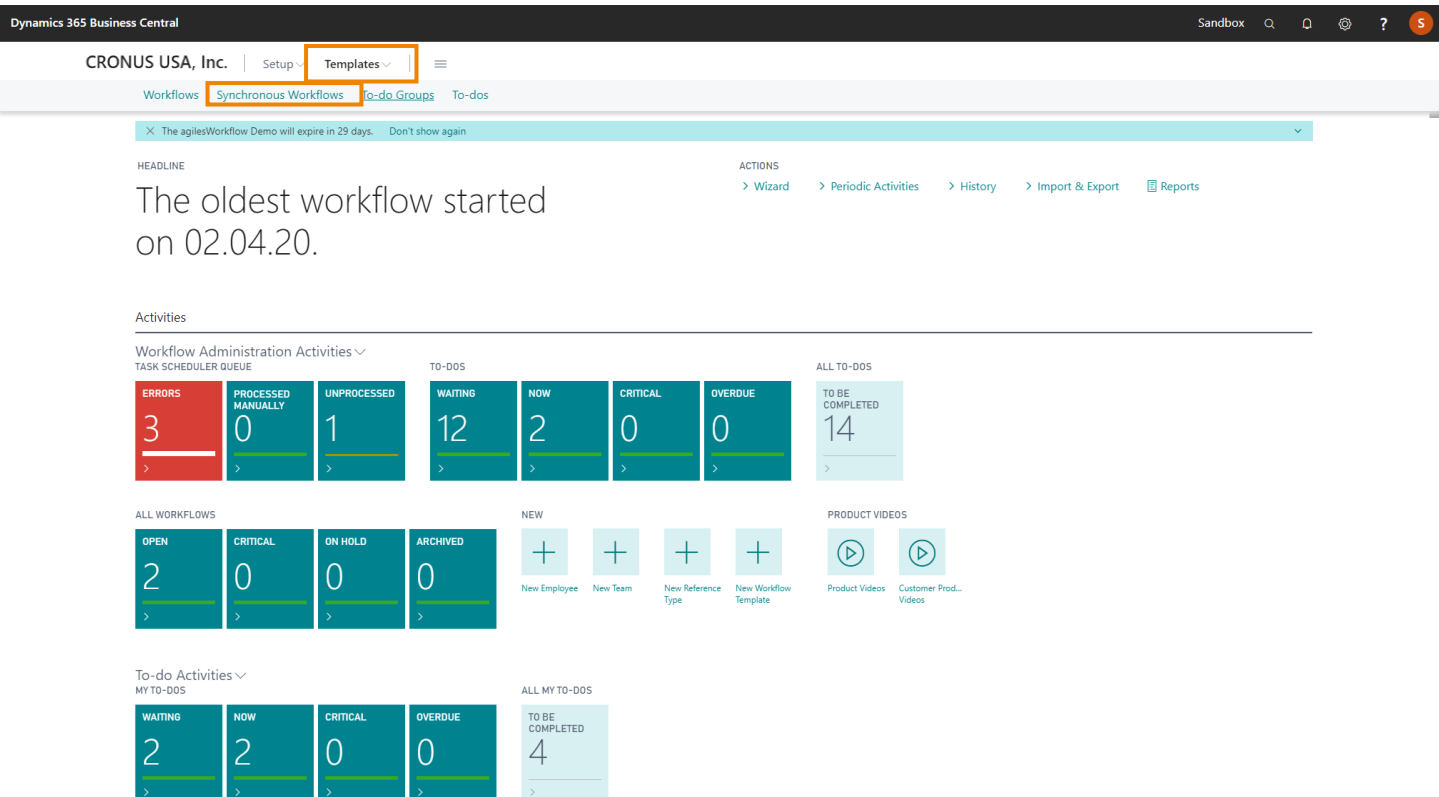
A green checkmark icon is also visible at the bottom of the details panel, and the 'Done' status name is highlighted with an orange box.

Scenario 2

Stop Posting

Scenario 2: Stop Posting – Synchronous Workflow

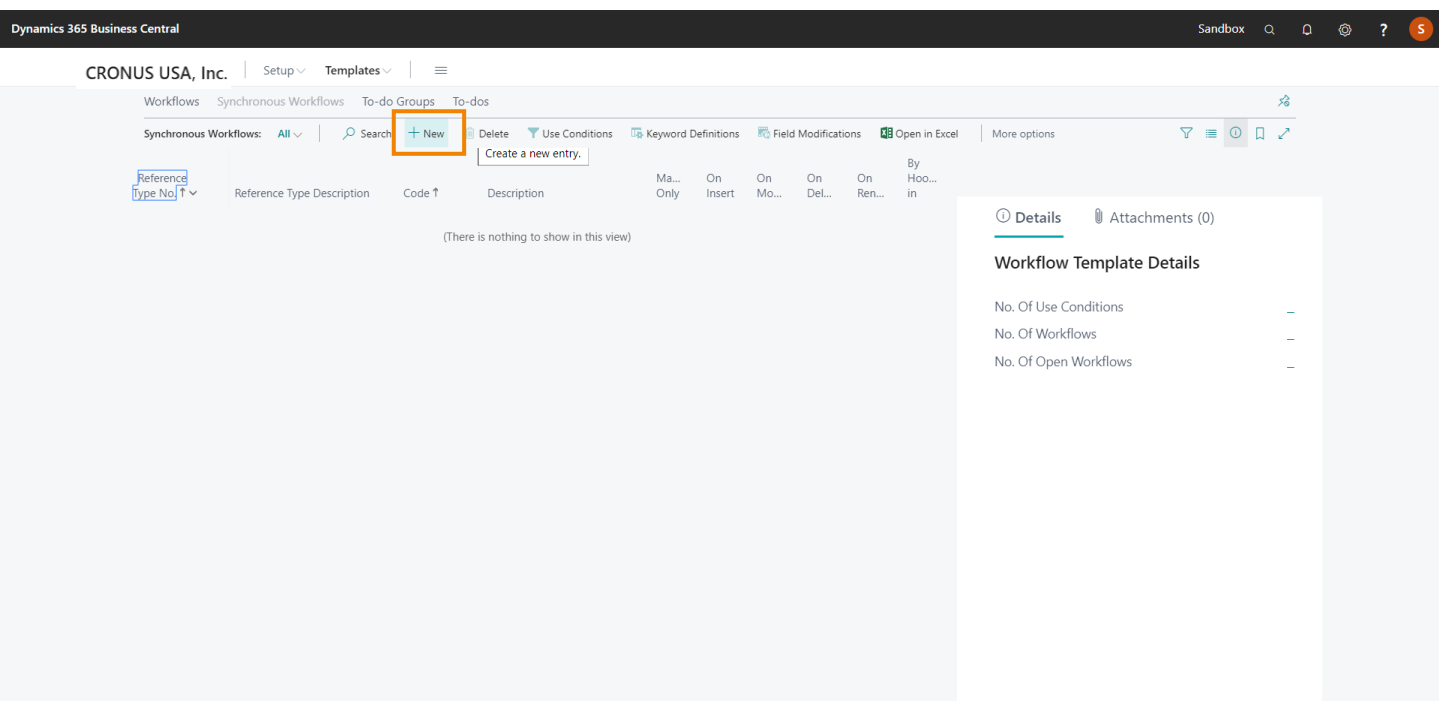
- 1) Click on **Templates**
- 2) Click on **Synchronous Workflow**



The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The 'Setup' menu is open, and 'Templates' is highlighted. Below the navigation bar, the 'Synchronous Workflows' tab is selected. A notification banner at the top states: 'The agilesWorkflow Demo will expire in 29 days. Don't show again'. The main content area displays a headline: 'The oldest workflow started on 02.04.20.' and a list of actions: Wizard, Periodic Activities, History, Import & Export, and Reports. The 'Activities' section is expanded to show 'Workflow Administration Activities' under the 'TASK SCHEDULER QUEUE'. This section includes several metrics: ERRORS (3), PROCESSED MANUALLY (0), UNPROCESSED (1), WAITING (12), NOW (2), CRITICAL (0), OVERDUE (0), and ALL TO-DOS (14). Below this, there are sections for 'ALL WORKFLOWS' (OPEN: 2, CRITICAL: 0, ON HOLD: 0, ARCHIVED: 0), 'NEW' (New Employee, New Team, New Reference Type, New Workflow Template), and 'PRODUCT VIDEOS' (Product Videos, Customer Prod... Videos). At the bottom, 'To-do Activities' are shown for 'MY TO-DOS' (WAITING: 2, NOW: 2, CRITICAL: 0, OVERDUE: 0) and 'ALL MY TO-DOS' (TO BE COMPLETED: 4).

Scenario 2: Stop Posting – Workflow Template

- 1) Click on **+New**



The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.' The 'To-do Groups' view is active, showing a table with columns for Reference Type, Description, and Code. The '+ New' button is highlighted with an orange box. A 'Details' pane on the right shows 'Workflow Template Details' with fields for 'No. Of Use Conditions', 'No. Of Workflows', and 'No. Of Open Workflows'. The table is currently empty, displaying '(There is nothing to show in this view)'.

Reference Type	Description	Code
(There is nothing to show in this view)		

Workflow Template Details

- No. Of Use Conditions
- No. Of Workflows
- No. Of Open Workflows

Scenario 2: Stop Posting – Workflow Template

1) General:

Use look up value in field Reference Type No. and select **38**

Enter Code → **SWF010**

Enter Description → **Stop Posting if Purchaser is missing**

Dynamics 365 Business Central

Sandbox

..NCHR. WORKFLOW TEMPLATE CARD | WORK DATE: 06.04.2020

SWF010

Use Conditions | Keyword Definitions | More options

General Show more

Reference Type No. Code

Reference Type Descripti... Purchase Header Description

Synchr. Modifications Subform | Manage

Description	Field ID	Field Description	Value Type	Fix Value Input	System Value
→ Purchase Header			Fix Value		

Event Triggers Show more

Manually Only By Hook-in

On Insert Hook-in Code

Details | Attachments (0)

Workflow Template Details

No. Of Use Conditions 0

No. Of Workflows 0

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**

Dynamics 365 Business Central | Sandbox | ...NCHR. WORKFLOW TEMPLATE CARD | WORK DATE: 06.04.2020

SWF010 · Stop Posting if Purchaser is missing

Use Conditions | Keyword Definitions | More options

Description	Field ID	Field Description	Value Type	Fix Value Input	System Value
→ Purchase Header			Fix Value		

Event Triggers Show more

Manually Only

On Insert

On Modify

On Delete

On Rename

By Hook-in

Hook-in Code

Break Condition Code

Break Condition Descript...

Look up value

Workflow Template Details

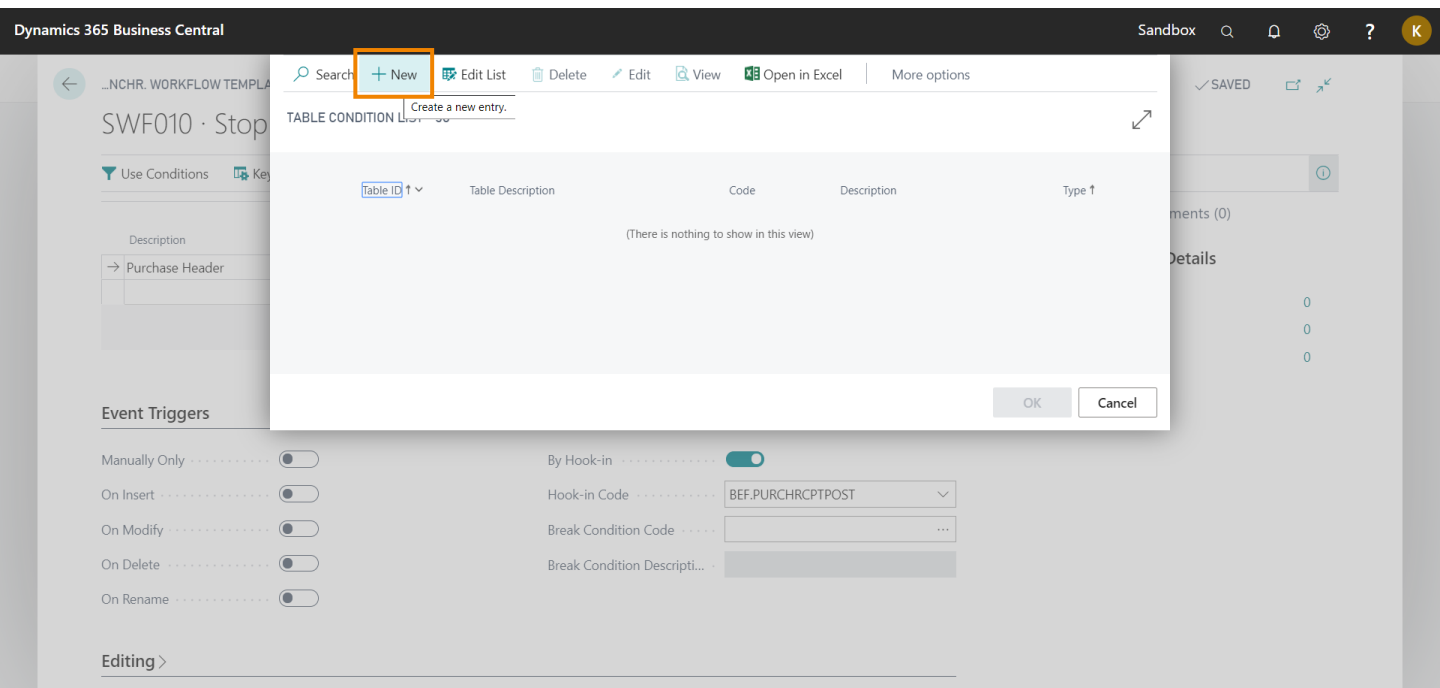
No. Of Use Conditions: 0

No. Of Workflows: 0

No. Of Open Workflows: 0

Scenario 2: Stop Posting – Table Condition

- 1) Click on **+New**



Scenario 2: Stop Posting – Table Condition

1) General:

Enter Code → SWF010-C020

Enter Description → Stop Posting

2) Table Condition:

Enter Type → Field

Enter Table ID → 38

Enter Field ID → 43

Enter Filter → “

3) Go back one page

Dynamics 365 Business Central

Sandbox

TABLE CONDITION CARD | WORK DATE: 06.04.2020

SWF010-C020 · Stop Posting

Navigate

General

Table ID 38 Description Stop Posting

Table Description Purchase Header Type Break

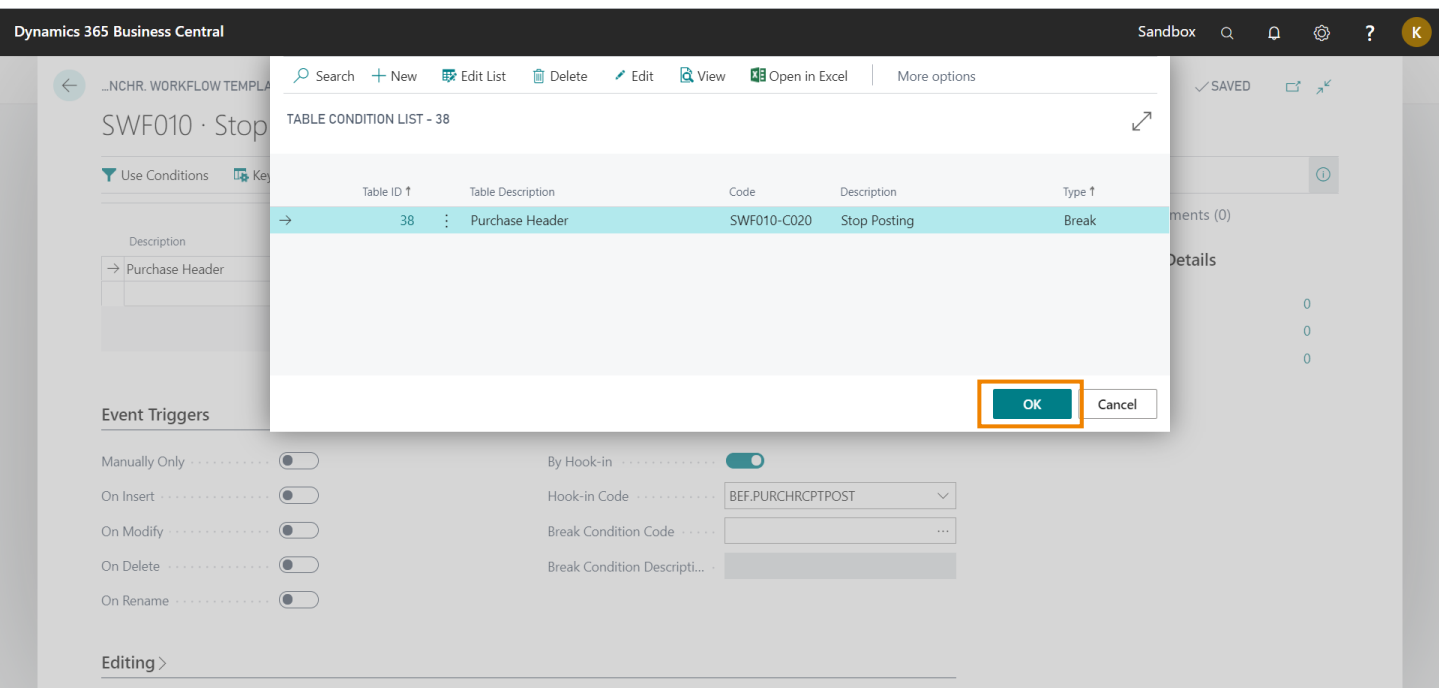
Code SWF010-C020

Table Condition Manage More options

Type	Table ID	Field ID	Field Description	Filter	Editing Page ID	Editing Page Description	Differing Table ID (Editing Page)	Dif Pac
Field	38	43	Purchaser Code	"				

Scenario 2: Stop Posting – Table Condition

- 1) Click on **Ok**



Dynamics 365 Business Central

Sandbox

SWF010 · Stop

TABLE CONDITION LIST - 38

Table ID ↑	Table Description	Code	Description	Type ↑
→ 38	Purchase Header	SWF010-C020	Stop Posting	Break

OK Cancel

Event Triggers

Manually Only

By Hook-in

On Insert

Hook-in Code BEF.PURCHRCPTPOST

On Modify

Break Condition Code

On Delete

Break Condition Descripti...

On Rename

Editing >

Scenario 2: Stop Posting – Table Condition

- 1) Click on **Use Conditions**

Dynamics 365 Business Central

Sandbox

..NCHR. WORKFLOW TEMPLATE CARD | WORK DATE: 06.04.2020

SWF010 · Stop Posting if Purchaser is missing

Use Conditions | Keyword Definitions | More options

Description	Field ID	Field Description	Value Type	Fix Value Input	System Value
→ Purchase Header			Fix Value		

Event Triggers

Manually Only By Hook-in

On Insert Hook-in Code

On Modify Break Condition Code

On Delete Break Condition Descript...

On Rename

Editing >

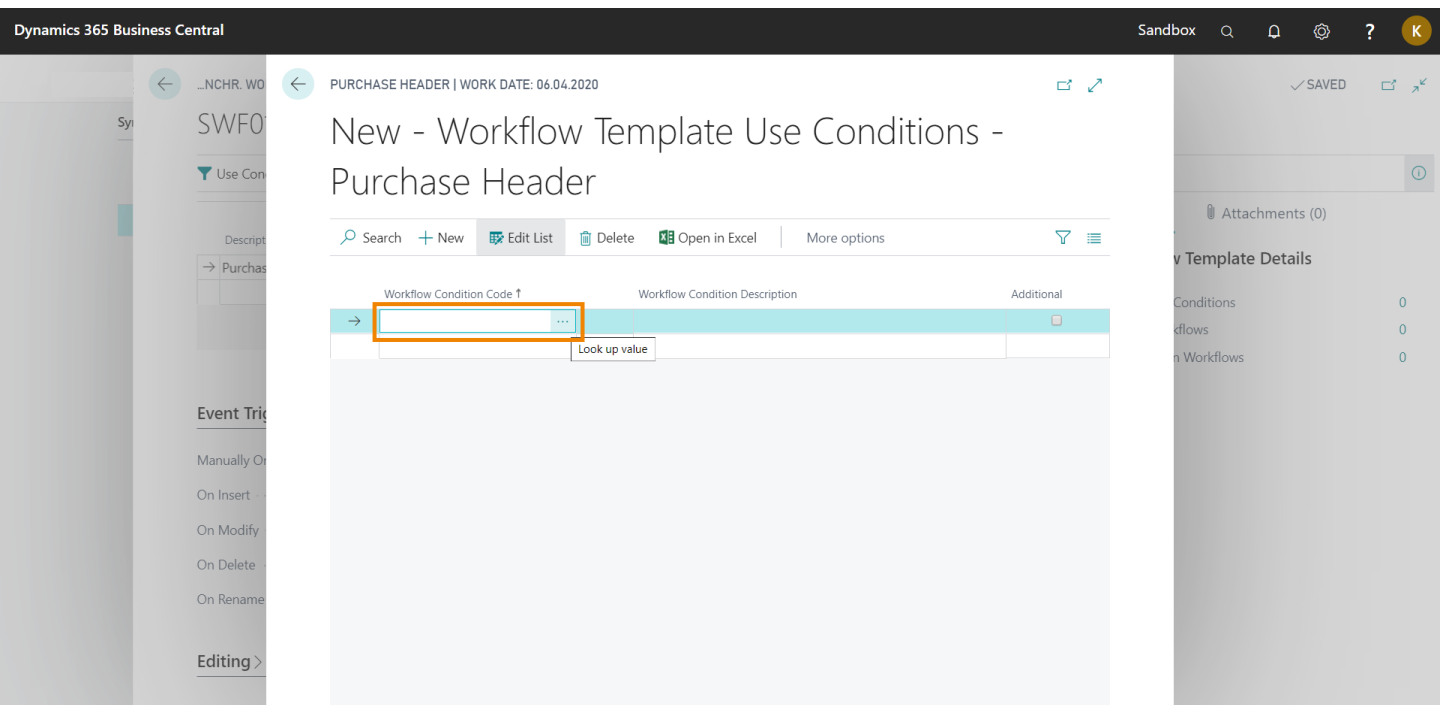
Details | Attachments (0)

Workflow Template Details

No. Of Use Conditions	0
No. Of Workflows	0
No. Of Open Workflows	0

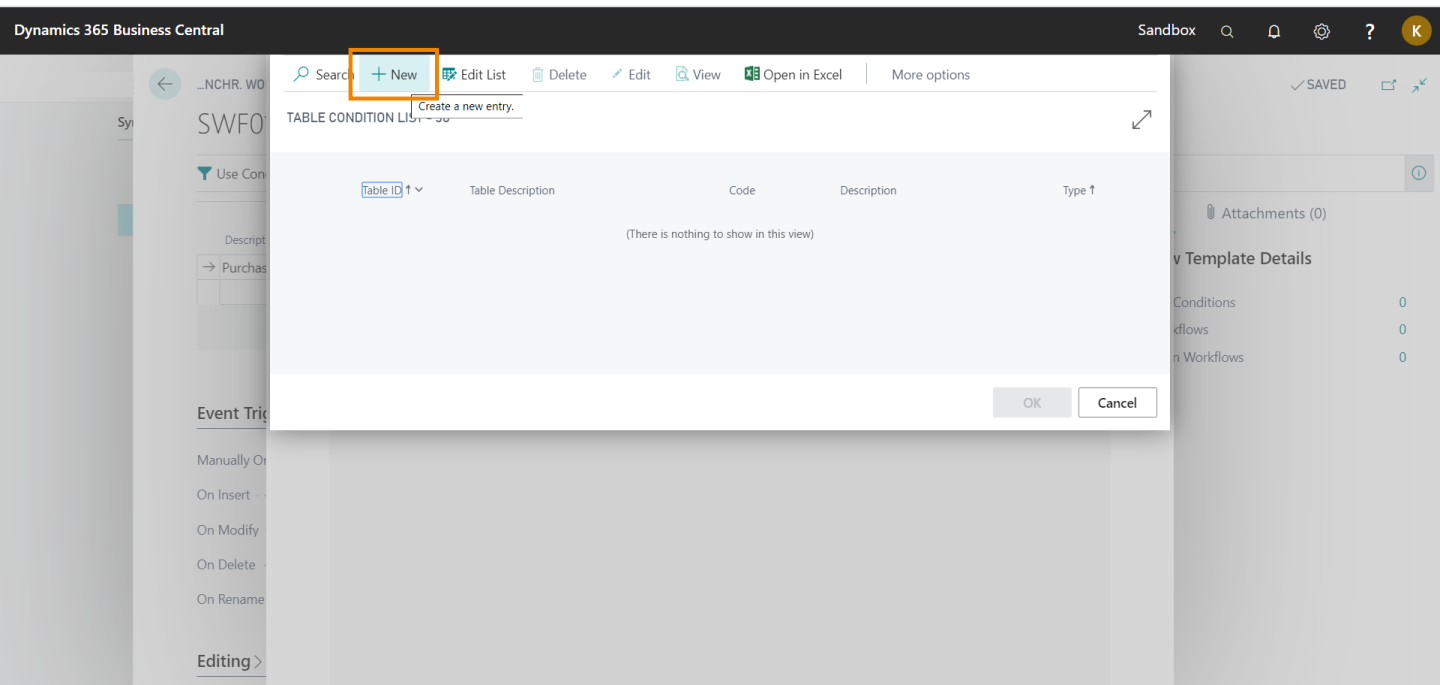
Scenario 2: Stop Posting – Table Condition

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



Scenario 2: Stop Posting – Table Condition

- 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 → Field

Enter Table ID → 38

Enter Field ID → 1

Enter Filter → Order

3) Close page

Dynamics 365 Business Central

Sandbox

TABLE CONDITION CARD | WORK DATE: 06.04.2020

SWF010-C010 · Only Purchase Orders

Navigate

General

Table ID 38 Description Only Purchase Orders

Table Description Purchase Header Type Workflow Template Use

Code SWF010-C010

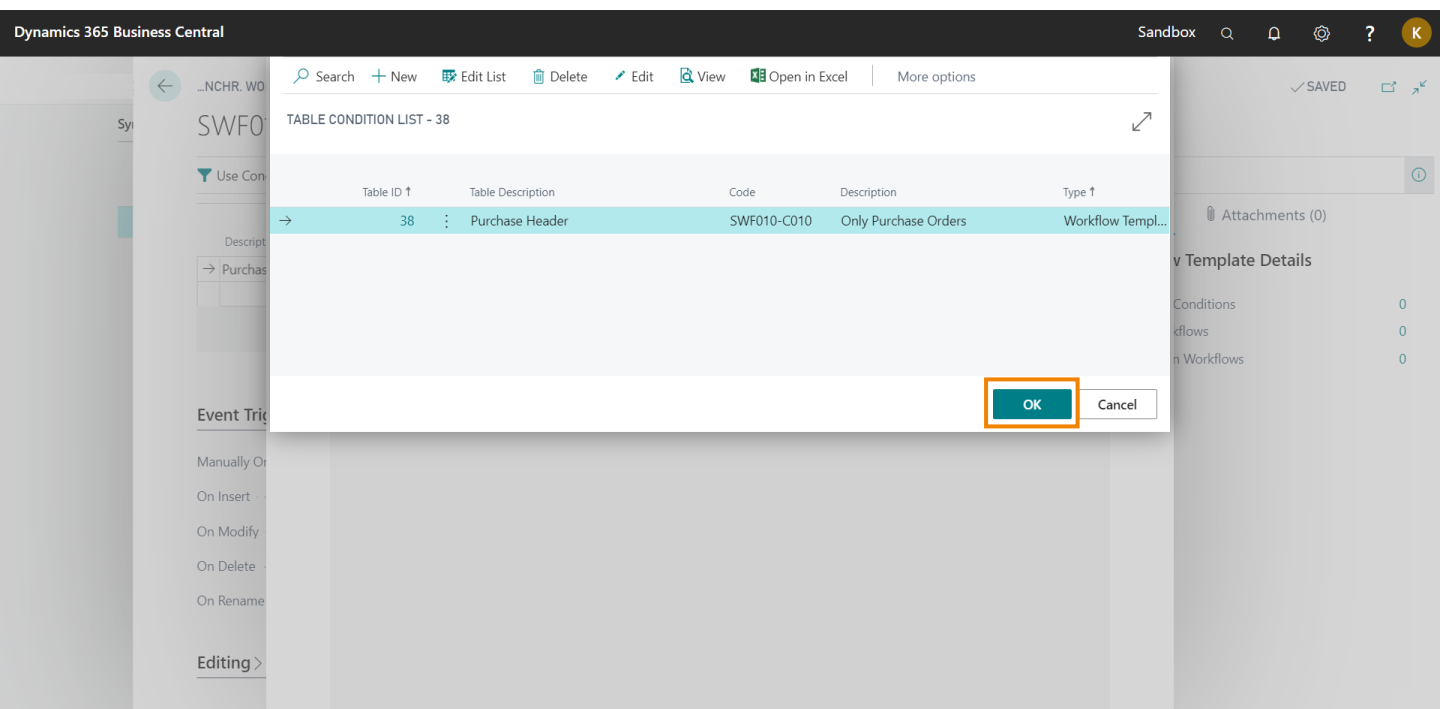
Table Condition Manage More options

Type	Table ID	Field ID	Field Description	Filter	Editing Page ID	Editing Page Description	Differing Table ID (Editing Page)	Dif Pat
Field	38	1	Document Type	Order				

Look up value

Scenario 2: Stop Posting – Table Condition

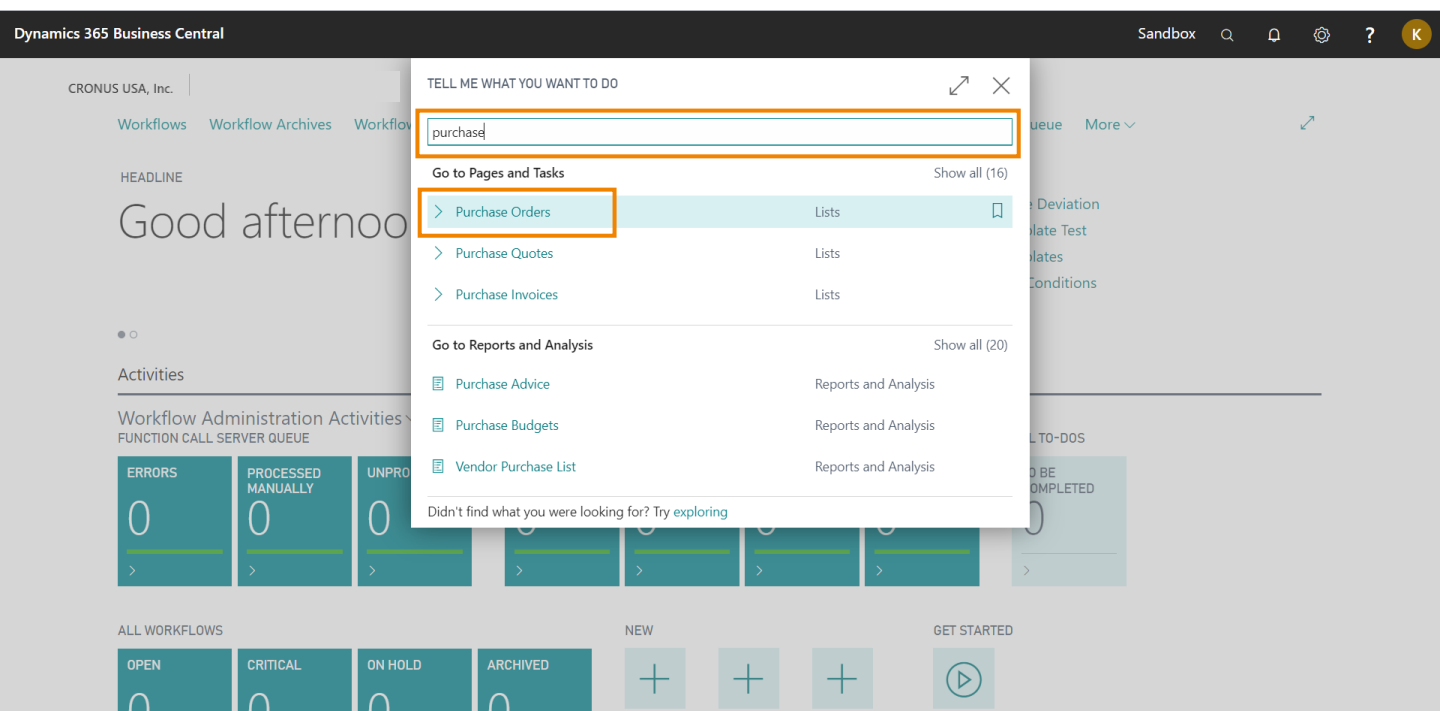
- 1) Click on **Ok**
- 2) Close all pages



User Perspective Scenario 2

User Perspective Scenario 2

- 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**



User Perspective Scenario 2

- 1) Click on **+New**

Dynamics 365 Business Central

Sandbox

PURCHASE ORDERS | WORK DATE: 06.04.2020

View - Purchase Orders

Search **+ New** Manage Print/Send Order Release Posting Navigate Open in Excel More options

Create a new entry.

No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorizati... No.	Location Code	Assigned User ID	Document Date	Status
106001	10000	Fabrikam, Inc.				08.04.2020	Open
106002	20000	First Up Consultants				09.04.2020	Open
106003	40000	Wide World Importers				13.04.2020	Open
106004	30000	Graphic Design Institute				01.05.2020	Open
106005	20000	First Up Consultants				06.04.2020	Released

Details Attachments (0)

Vendor Details

Vendor No. 10000
Name Fabrikam, Inc.
Phone No. 4255550101
Email krystal.york@contoso.com
Fax No.
Contact Krystal York

User Perspective Scenario 2

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

Dynamics 365 Business Central

PURCHASE ORDER | WORK DATE: 06.04.2020

106006

Process Release Posting Order Request Approval Print/Send Navigate More options

General Show more

Vendor Name * Vendor Invoice No. *

Contact Vendor Shipment No.

Document Date 06.04.2020

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved Qu
→ Item						

Subtotal Excl. Tax (USD) 0,00 Total Excl. Tax (USD) 0,00

Inv. Discount Amount (U... 0,00 Total Tax (USD) 0,00

Invoice Discount % 0 Total Incl. Tax (USD) 0,00

Vendor Statistics

Vendor No. -

Balance (\$) -

Outstanding Orders (\$) -

Amt. Rcd. Not Invd. (\$) -

Outstanding Invoices (\$) -

Total (\$) 0,00

Overdue Amounts (\$) as of 0... 0,00

Invoiced Prepayment Amoun... 0,00

Payments (\$) -

Refunds (\$) -

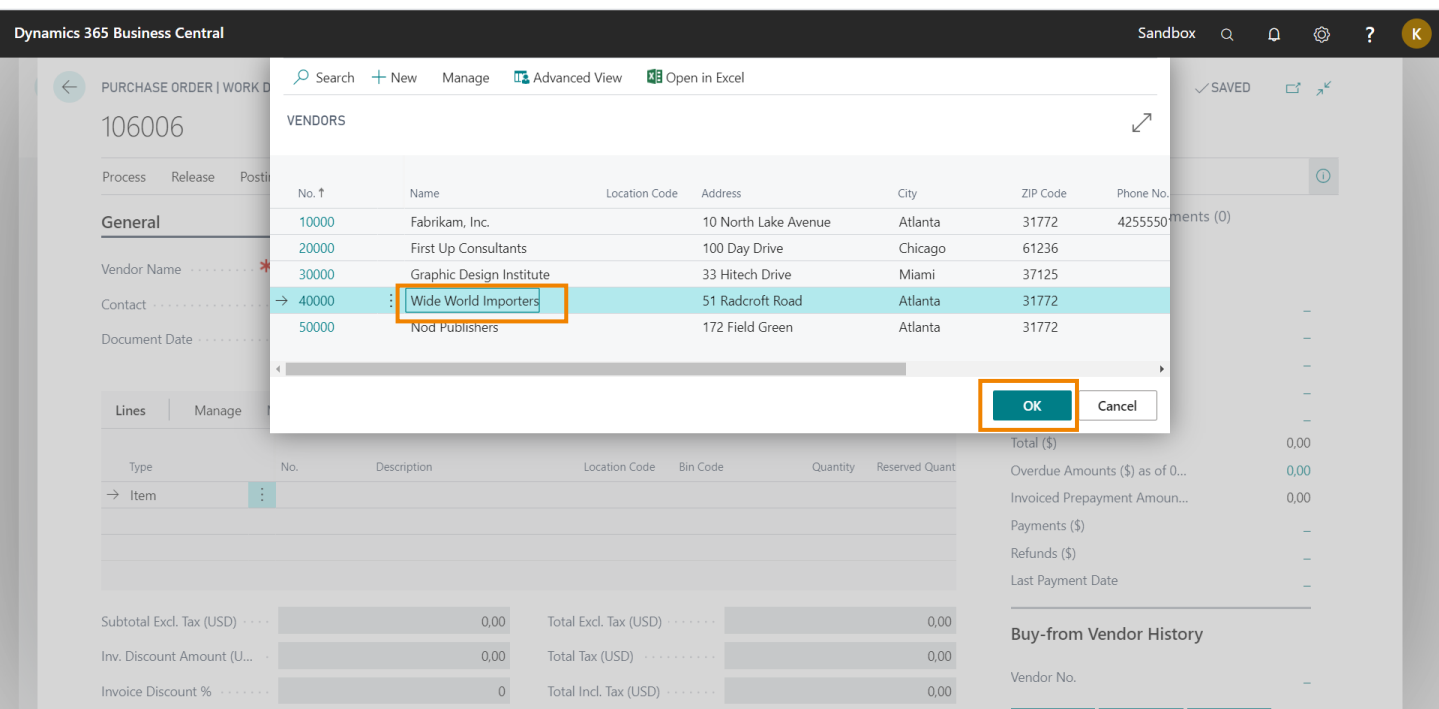
Last Payment Date -

Buy-from Vendor History

Vendor No. -

User Perspective Scenario 2

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



The screenshot shows the Dynamics 365 Business Central interface. A 'VENDORS' list is displayed in a modal window, overlaid on a 'PURCHASE ORDER | WORK ORDER' page. The list contains the following data:

No.	Name	Location Code	Address	City	ZIP Code	Phone No.
10000	Fabrikam, Inc.		10 North Lake Avenue	Atlanta	31772	4255550
20000	First Up Consultants		100 Day Drive	Chicago	61236	
30000	Graphic Design Institute		33 Hitech Drive	Miami	37125	
40000	Wide World Importers		51 Radcroft Road	Atlanta	31772	
50000	Nod Publishers		172 Field Green	Atlanta	31772	

The 'Wide World Importers' row is highlighted in light blue. An orange box highlights the 'Wide World Importers' text in the Name column. Another orange box highlights the 'OK' button at the bottom right of the modal window. The background page shows a purchase order with a total of 0.00 and a 'Buy-from Vendor History' section.

User Perspective Scenario 2

1) General:

Enter Type → **Item**

Enter No. → **1900-S**

Enter Description → **Paris Guest Chair, black**

Enter Location Code → **MAIN**

Enter Quantity → **200**

Dynamics 365 Business Central

Sandbox

PURCHASE ORDER | WORK DATE: 06.04.2020

106006 · Wide World Importers

Process Release Posting Order Request Approval Print/Send Navigate More options

General Show more

Vendor Name: Wide World Importers Vendor Invoice No. *

Contact: Toby Rhode Vendor Shipment No.

Document Date: 06.04.2020

Lines Manage More options

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved Qua
→ Item	1900-S	PARIS Guest Chair, black	MAIN		200	

Subtotal Excl. Tax (USD) 30.060,00 Total Excl. Tax (USD) 30.060,00

Inv. Discount Amount (U...) 0,00 Total Tax (USD) 0,00

Invoice Discount % 0 Total Incl. Tax (USD) 30.060,00

Details Attachments (0)

Vendor Statistics

Vendor No.	40000
Balance (\$)	18.193,10
Outstanding Orders (\$)	11.584,10
Amt. Rcd. Not Invd. (\$)	0,00
Outstanding Invoices (\$)	0,00
Total (\$)	29.777,20
Overdue Amounts (\$) as of 0...	18.193,10
Invoiced Prepayment Amoun...	0,00
Payments (\$)	194.408,51
Refunds (\$)	0,00
Last Payment Date	12.02.2020

Buy-from Vendor History

Vendor No.	40000
------------	-------

User Perspective Scenario 2

1) General: Click on **Show more**

Dynamics 365 Business Central | Sandbox

PURCHASE ORDER | WORK DATE: 06.04.2020

106006 · Wide World Importers

Process Release Posting Order Request Approval Print/Send Navigate More options

General Show more

Vendor Name: Wide World Importers Vendor Invoice No. * []

Contact: Toby Rhode Vendor Shipment No. []

Document Date: 06.04.2020

Lines Manage More options

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved Qu
→ Item	1900-S	PARIS Guest Chair, black	MAIN		200	

Subtotal Excl. Tax (USD) 30.060,00 Total Excl. Tax (USD) 30.060,00

Inv. Discount Amount (U... 0,00 Total Tax (USD) 0,00

Invoice Discount % 0 Total Incl. Tax (USD) 30.060,00

Vendor Statistics

Vendor No. 40000

Balance (\$) 18.193,10

Outstanding Orders (\$) 11.584,10

Amt. Rcd. Not Invd. (\$) 0,00

Outstanding Invoices (\$) 0,00

Total (\$) 29.777,20

Overdue Amounts (\$) as of 0... 18.193,10

Invoiced Prepayment Amoun... 0,00

Payments (\$) 194.408,51

Refunds (\$) 0,00

Last Payment Date 12.02.2020

Buy-from Vendor History

Vendor No. 40000

User Perspective Scenario 2

1) General: Field Purchaser Code is empty

Dynamics 365 Business Central | Sandbox

PURCHASE ORDER | WORK DATE: 06.04.2020

106006 · Wide World Importers

Process Release Posting Order Request Approval Print/Send Navigate More options

General [Show less](#)

Vendor No.	40000	Due Date	30.04.2020
Vendor Name	Wide World Importers	Vendor Invoice No. *	
BUY-FROM		Purchaser Code	
Address	51 Radcroft Road	No. of Archived Versions	
Address 2		Order Date	06.04.2020
City	Atlanta	Quote No.	
State	GA	Vendor Order No.	
ZIP Code	31772	Vendor Shipment No.	
Country/Region	US	Alternate Vendor Address... ..	
Contact No.	CT000017	Responsibility Center	
Contact	Toby Rhode	Assigned User ID	
Document Date	06.04.2020	Status	Open
Posting Date	06.04.2020		

Details Attachments (0)

Vendor Statistics

Vendor No.	40000
Balance (\$)	18.193,10
Outstanding Orders (\$)	11.584,10
Amt. Rcd. Not Invd. (\$)	0,00
Outstanding Invoices (\$)	0,00
Total (\$)	29.777,20
Overdue Amounts (\$) as of 0...	18.193,10
Invoiced Prepayment Amoun...	0,00
Payments (\$)	194.408,51
Refunds (\$)	0,00
Last Payment Date	12.02.2020

Buy-from Vendor History

Vendor No.	40000
------------	-------

User Perspective Scenario 2

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

Dynamics 365 Business Central

Sandbox

PURCHASE ORDER | WORK DATE: 06.04.2020

106006 · Wide World Importers

Process Release **Posting** Order Request Approval Print/Send Navigate More options

Post... Post and Print... Preview Posting Post and New...

Finalize the document or journal by posting the amounts and quantities to the related accounts in your company books. (F9)

Vendor No.	40000	Due Date	30.04.2020
Vendor Name	Wide World Importers	Vendor Invoice No.	*
BUY-FROM		Purchaser Code	
Address	51 Radcroft Road	No. of Archived Versions	0
Address 2		Order Date	06.04.2020
City	Atlanta	Quote No.	
State	GA	Vendor Order No.	
ZIP Code	31772	Vendor Shipment No.	
Country/Region	US	Alternate Vendor Address	
Contact No.	CT000017	Responsibility Center	
Contact	Toby Rhode	Assigned User ID	
Document Date	06.04.2020	Status	Open
Posting Date	06.04.2020		

Vendor Statistics

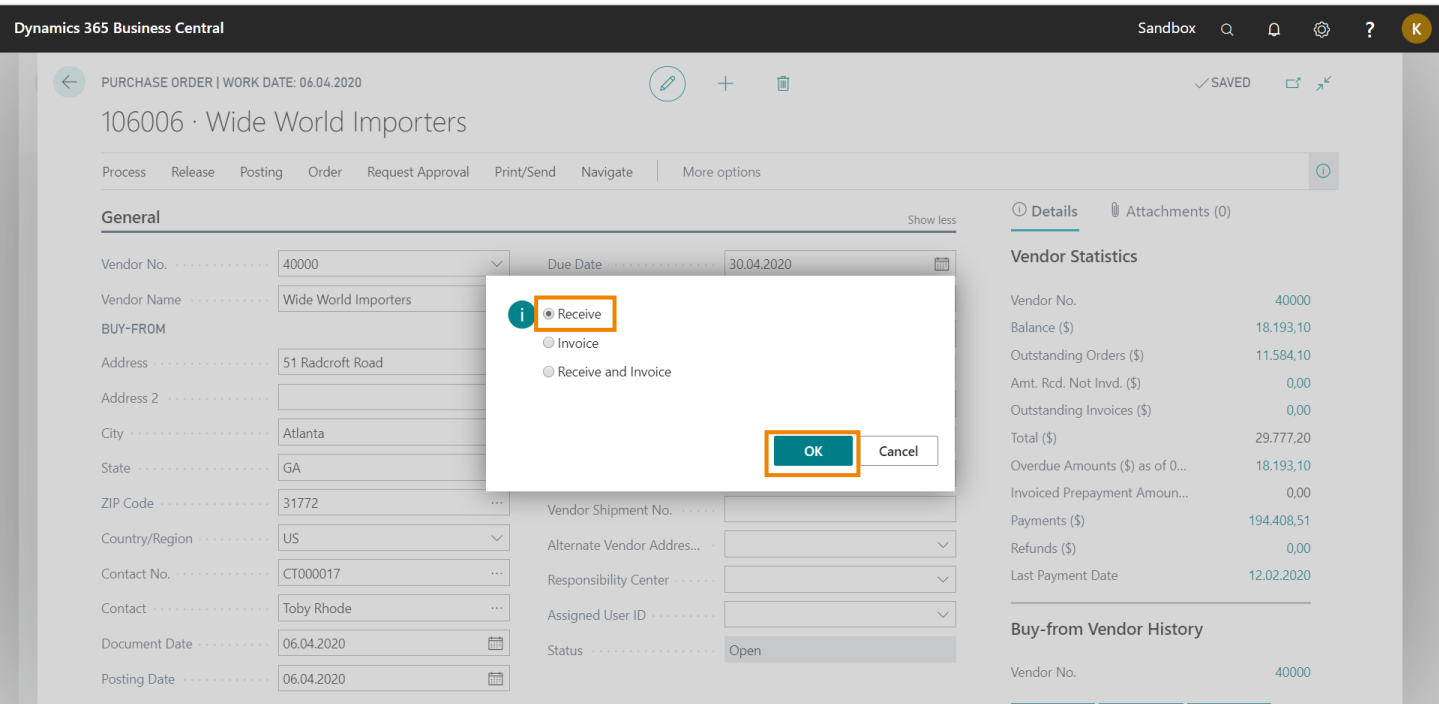
Vendor No.	40000
Balance (\$)	18,193.10
Outstanding Orders (\$)	11,584.10
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	0.00
Total (\$)	29,777.20
Overdue Amounts (\$ as of 0...	18,193.10
Invoiced Prepayment Amoun...	0.00
Payments (\$)	194,408.51
Refunds (\$)	0.00
Last Payment Date	12.02.2020

Buy-from Vendor History

Vendor No.	40000
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User Perspective Scenario 2

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



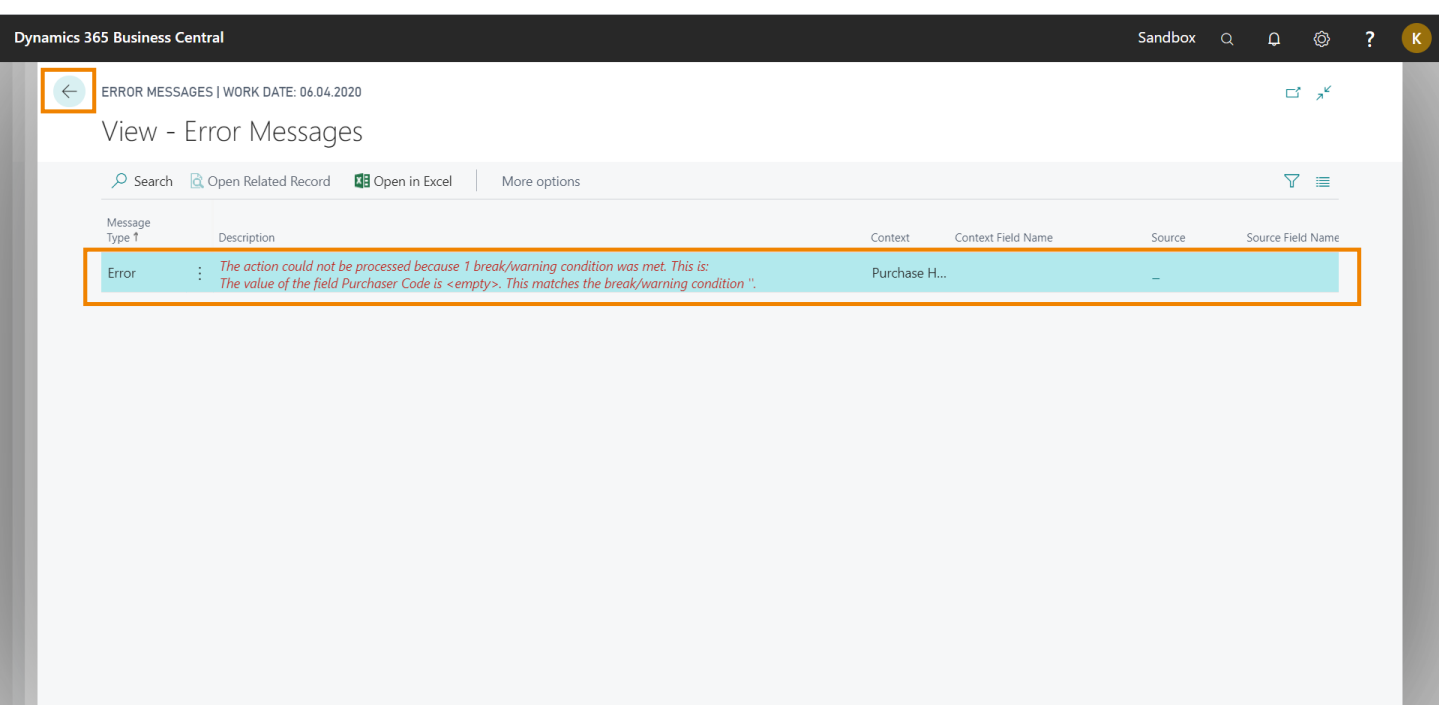
The screenshot displays the Dynamics 365 Business Central interface for a purchase order. The main header shows 'PURCHASE ORDER | WORK DATE: 06.04.2020' and '106006 · Wide World Importers'. The 'General' tab is active, showing fields for Vendor No. (40000), Due Date (30.04.2020), Vendor Name (Wide World Importers), and Address (51 Radcroft Road, Atlanta, GA). A modal dialog is open in the center, with the 'Receive' option selected and highlighted by an orange box. The 'OK' button in the dialog is also highlighted with an orange box. To the right, the 'Vendor Statistics' section shows a table of financial data for vendor 40000.

Vendor Statistics	
Vendor No.	40000
Balance (\$)	18,193.10
Outstanding Orders (\$)	11,584.10
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	0.00
Total (\$)	29,777.20
Overdue Amounts (\$) as of 0...	18,193.10
Invoiced Prepayment Amoun...	0.00
Payments (\$)	194,408.51
Refunds (\$)	0.00
Last Payment Date	12.02.2020

Buy-from Vendor History	
Vendor No.	40000

User Perspective Scenario 2

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



The screenshot shows the Dynamics 365 Business Central interface. At the top, it says "Dynamics 365 Business Central" on the left and "Sandbox" on the right. Below the header, there is a navigation bar with a back arrow icon and the text "ERROR MESSAGES | WORK DATE: 06.04.2020". The main content area is titled "View - Error Messages". Below the title, there are several action buttons: "Search", "Open Related Record", "Open in Excel", and "More options". A table displays error messages with the following columns: "Message Type", "Description", "Context", "Context Field Name", "Source", and "Source Field Name". One error message is highlighted with a red box:

Message Type	Description	Context	Context Field Name	Source	Source Field Name
Error	The action could not be processed because 1 break/warning condition was met. This is: The value of the field Purchaser Code is <empty>. This matches the break/warning condition .	Purchase H...		-	

User Perspective Scenario 2

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

Dynamics 365 Business Central

PURCHASE ORDER | WORK DATE: 06.04.2020

106006 · Wide World Importers

Process Release Posting Order Request Approval Print/Send Navigate More options

General Show less

Vendor No.	40000	Due Date	30.04.2020
Vendor Name	Wide World Importers	Vendor Invoice No. *	
BUY-FROM		Purchaser Code	AH
Address	51 Radcroft Road	No. of Archived Versions	Look up value 0
Address 2		Order Date	06.04.2020
City	Atlanta	Quote No.	
State	GA	Vendor Order No.	
ZIP Code	31772	Vendor Shipment No.	
Country/Region	US	Alternate Vendor Addr... ..	
Contact No.	CT000017	Responsibility Center	
Contact	Toby Rhode	Assigned User ID	
Document Date	06.04.2020	Status	Open
Posting Date	06.04.2020		

Details Attachments (0)

Vendor Statistics

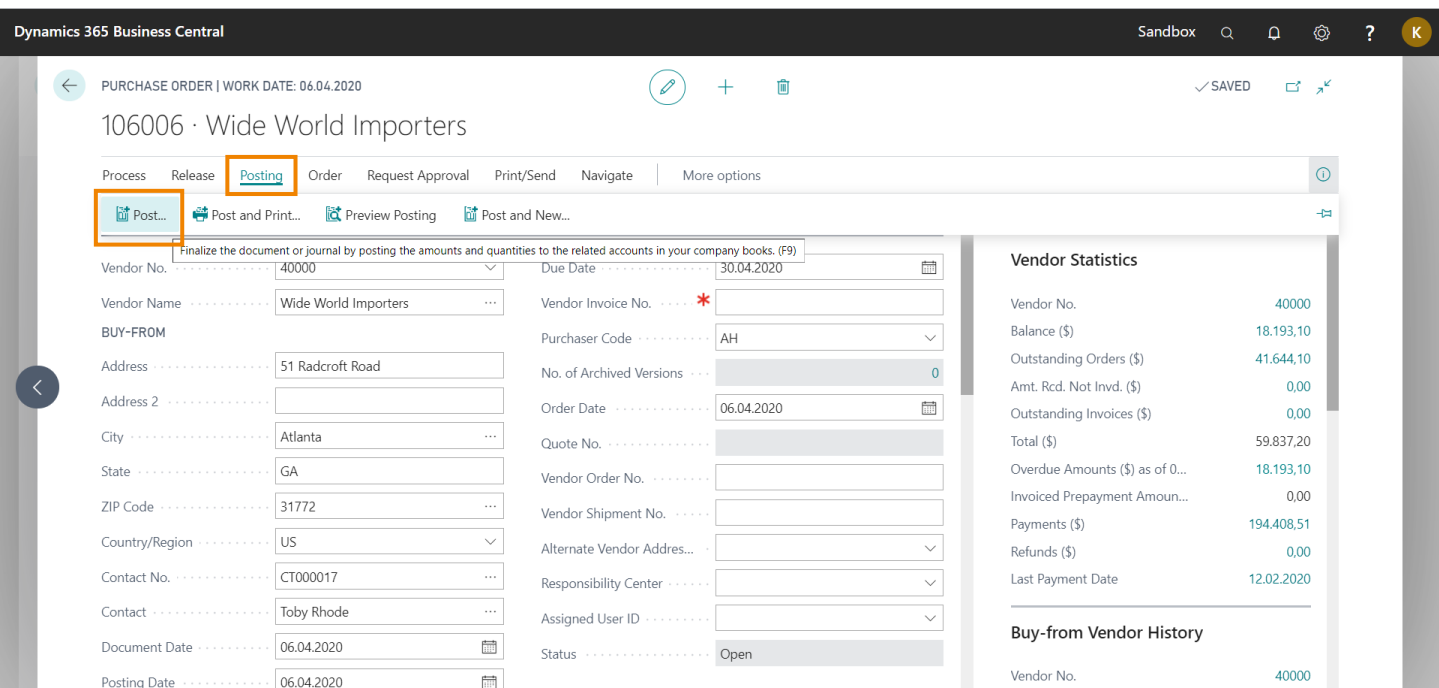
Vendor No.	40000
Balance (\$)	18,193.10
Outstanding Orders (\$)	41,644.10
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	0.00
Total (\$)	59,837.20
Overdue Amounts (\$) as of 0...	18,193.10
Invoiced Prepayment Amoun...	0.00
Payments (\$)	194,408.51
Refunds (\$)	0.00
Last Payment Date	12.02.2020

Buy-from Vendor History

Vendor No.	40000
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User Perspective Scenario 2

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



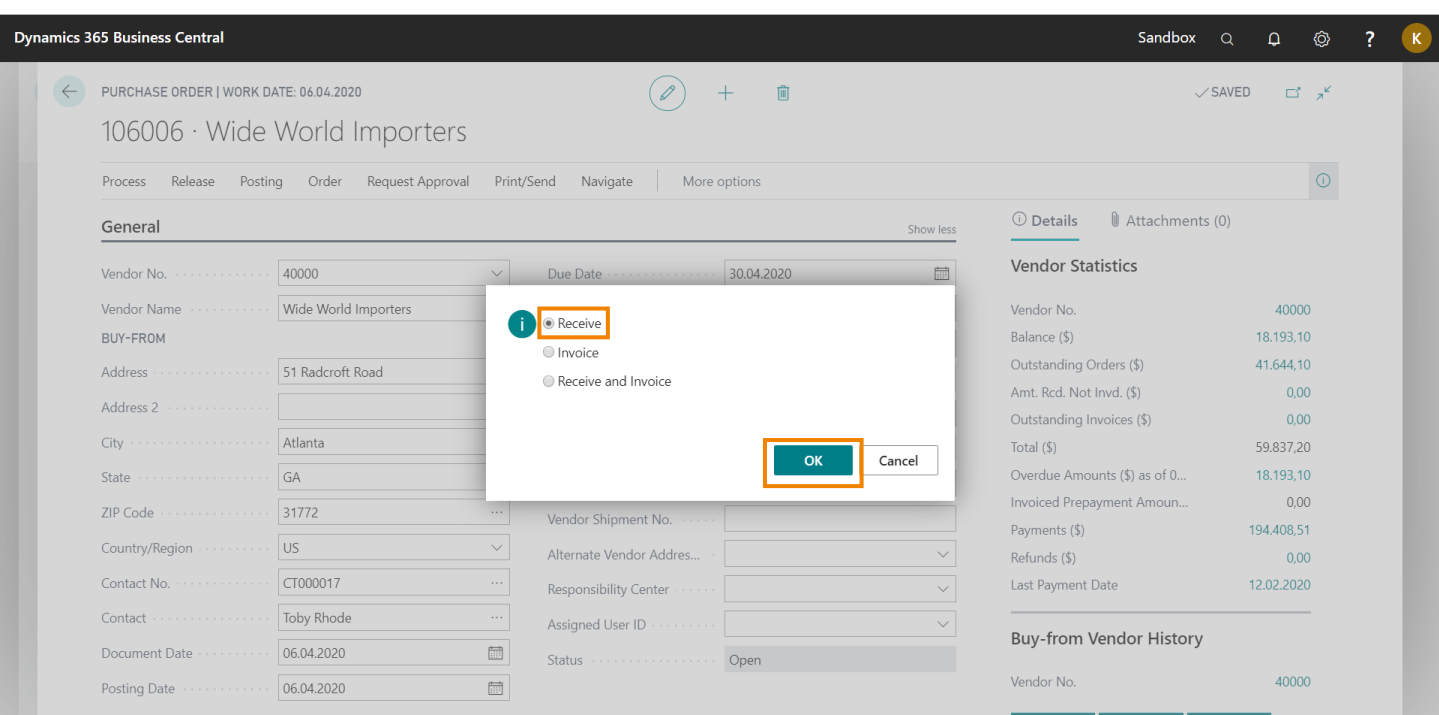
The screenshot displays the Dynamics 365 Business Central interface for a purchase order. The breadcrumb navigation shows 'PURCHASE ORDER | WORK DATE: 06.04.2020'. The main title is '106006 · Wide World Importers'. The 'Posting' tab is selected in the top navigation bar. Below the navigation bar, there are four buttons: 'Post...', 'Post and Print...', 'Preview Posting', and 'Post and New...'. The 'Post...' button is highlighted with an orange box. A tooltip for the 'Post...' button reads: 'Finalize the document or journal by posting the amounts and quantities to the related accounts in your company books. (F9)'. The main form contains fields for Vendor No. (40000), Vendor Name (Wide World Importers), Address (51 Radcroft Road), City (Atlanta), State (GA), ZIP Code (31772), Country/Region (US), Contact No. (CT000017), Contact (Toby Rhode), Document Date (06.04.2020), and Posting Date (06.04.2020). On the right side, there is a 'Vendor Statistics' section with a table of financial data and a 'Buy-from Vendor History' section.

Vendor No.	Balance (\$)	Outstanding Orders (\$)	Amt. Rcd. Not Invd. (\$)	Outstanding Invoices (\$)	Total (\$)	Overdue Amounts (\$) as of 0...	Invoiced Prepayment Amoun...	Payments (\$)	Refunds (\$)	Last Payment Date
40000	18,193.10	41,644.10	0.00	0.00	59,837.20	18,193.10	0.00	194,408.51	0.00	12.02.2020

Vendor No.
40000

User Perspective Scenario 2

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



The screenshot displays the Dynamics 365 Business Central interface for a purchase order. The main window shows the 'General' tab for a purchase order with Vendor No. 40000 and Vendor Name 'Wide World Importers'. A modal dialog is open in the center, titled 'i', with three radio button options: 'Receive' (selected and highlighted with an orange box), 'Invoice', and 'Receive and Invoice'. The 'OK' button in the dialog is also highlighted with an orange box. The background interface includes a top navigation bar with 'Dynamics 365 Business Central', 'Sandbox', and search icons. Below the navigation bar, there are tabs for 'Process', 'Release', 'Posting', 'Order', 'Request Approval', 'Print/Send', 'Navigate', and 'More options'. The 'General' section contains fields for Vendor No., Vendor Name, BUY-FROM, Address, City, State, ZIP Code, Country/Region, Contact No., Contact, Document Date, and Posting Date. On the right side, there is a 'Vendor Statistics' section with a table of financial data and a 'Buy-from Vendor History' section.

Vendor Statistics	
Vendor No.	40000
Balance (\$)	18,193.10
Outstanding Orders (\$)	41,644.10
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	0.00
Total (\$)	59,837.20
Overdue Amounts (\$) as of 0...	18,193.10
Invoiced Prepayment Amoun...	0.00
Payments (\$)	194,408.51
Refunds (\$)	0.00
Last Payment Date	12.02.2020

Buy-from Vendor History	
Vendor No.	40000

User Perspective Scenario 2

- 1) Check if posting was successfully
- 2) Quantity Received is 200 → This posting was successfully

Dynamics 365 Business Central

PURCHASE ORDER | WORK DATE: 06.04.2020

106006 · Wide World Importers

Process Release Posting Order Request Approval Print/Send Navigate More options

Contact Toby Rhode Vendor Shipment No.

Document Date 06.04.2020

Type	Quantity Received	Qty. to Invoice	Quantity Invoiced	Qty. to Assign	Qty. Assigned	Promised Receipt Date	Planned Receipt Date
→ Item	200	200		0	-		06.04.2020

Subtotal Excl. Tax (USD) 30.060,00 Total Excl. Tax (USD) 30.060,00

Inv. Discount Amount (U.S.) 0,00 Total Tax (USD) 0,00

Invoice Discount % 0 Total Incl. Tax (USD) 30.060,00

Invoice Details Show more

Vendor Statistics

Vendor No. 40000

Balance (\$) 18.193,10

Outstanding Orders (\$) 11.584,10

Amt. Rcd. Not Invd. (\$) 30.060,00

Outstanding Invoices (\$) 0,00

Total (\$) 59.837,20

Overdue Amounts (\$) as of 0... 18.193,10

Invoiced Prepayment Amoun... 0,00

Payments (\$) 194.408,51

Refunds (\$) 0,00

Last Payment Date 12.02.2020

Buy-from Vendor History

Vendor No. 40000