User Documentation AppSource

Aptean Advanced Workflow

April 2nd, 2020

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Contents

Important additional information:

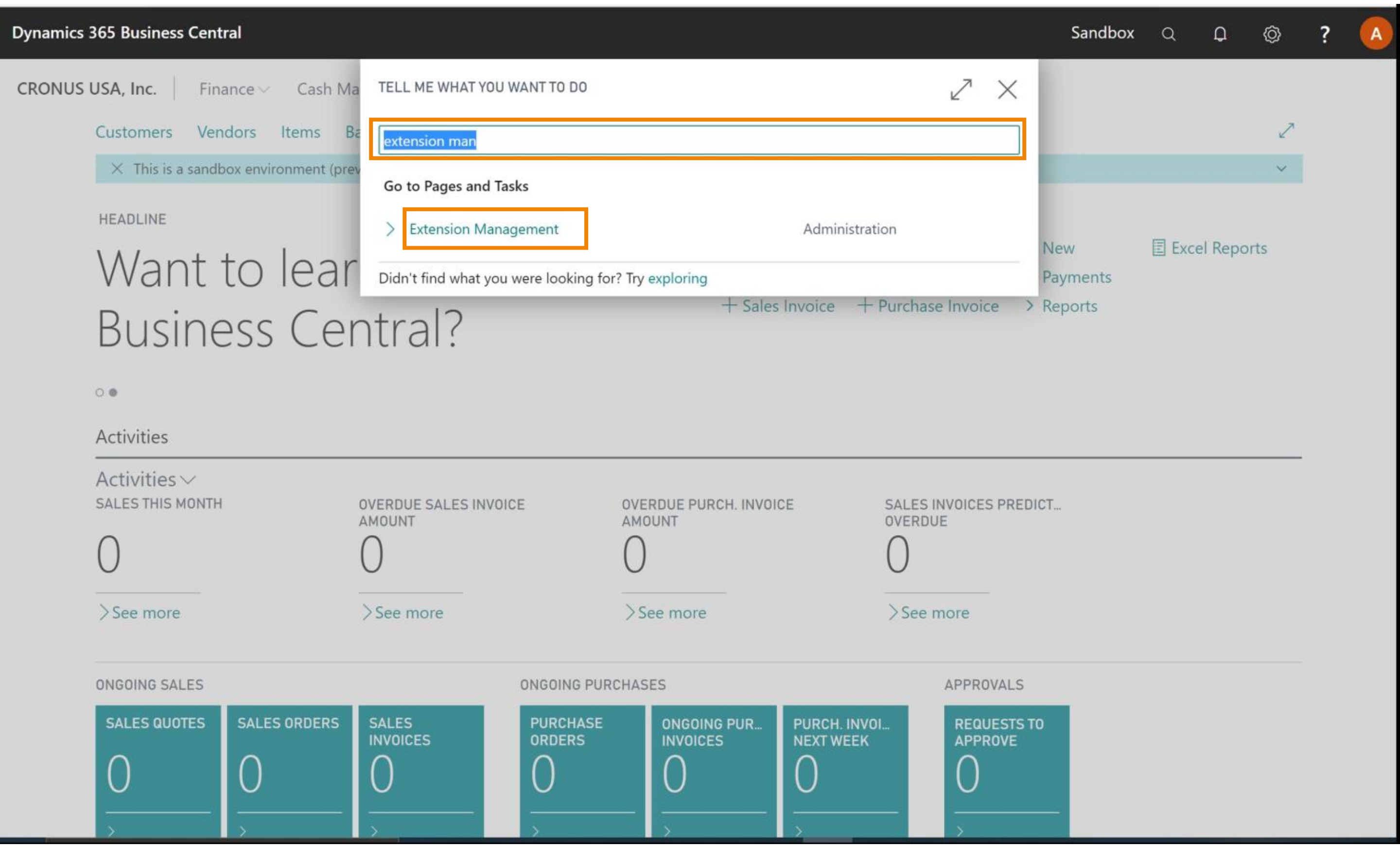
The User Documentation was done in a US database in
Microsoft Dynamics 365 Business Central Wave1 2020 (BC16).

Set your Work Date to System Date.

Basic Setup

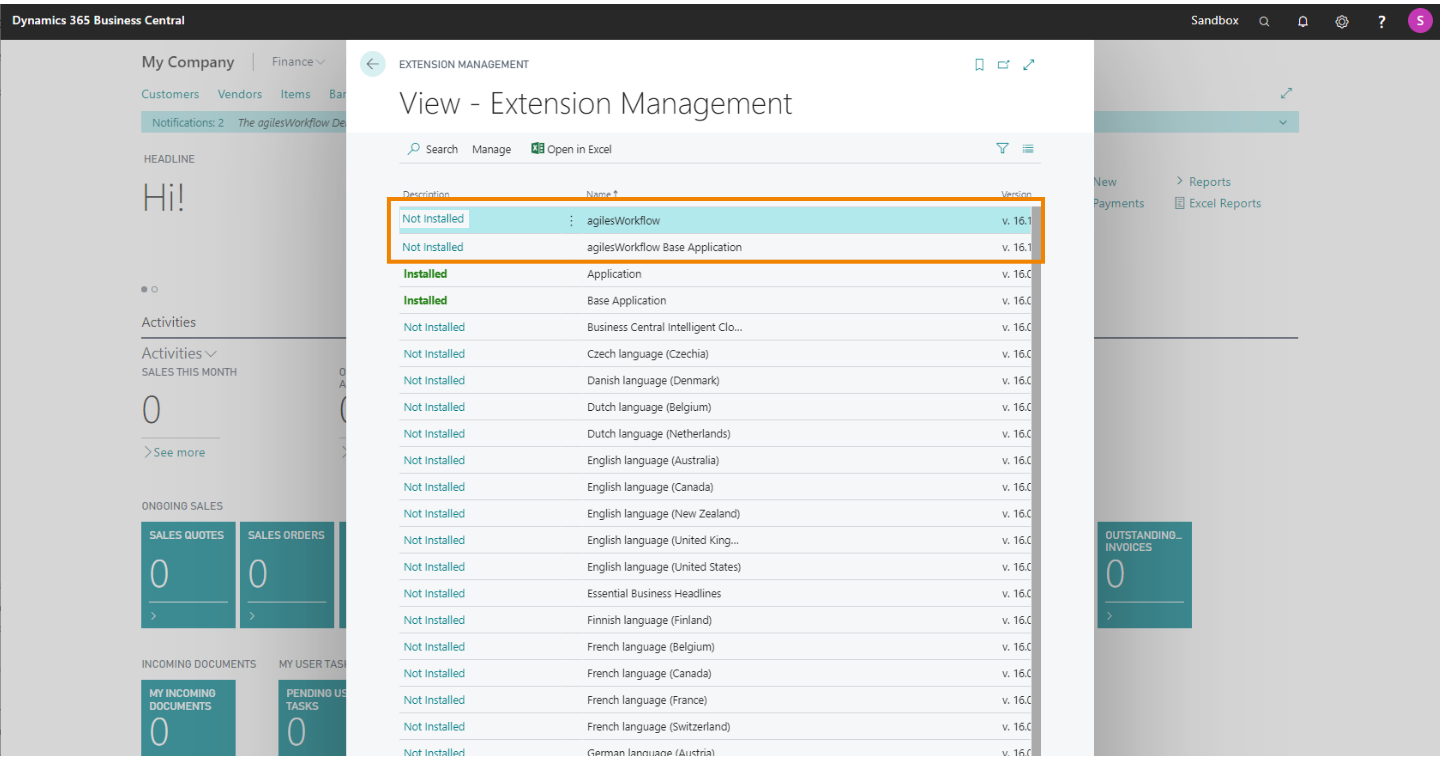
Basic Setup – Load Extension

1) Open Extension Management



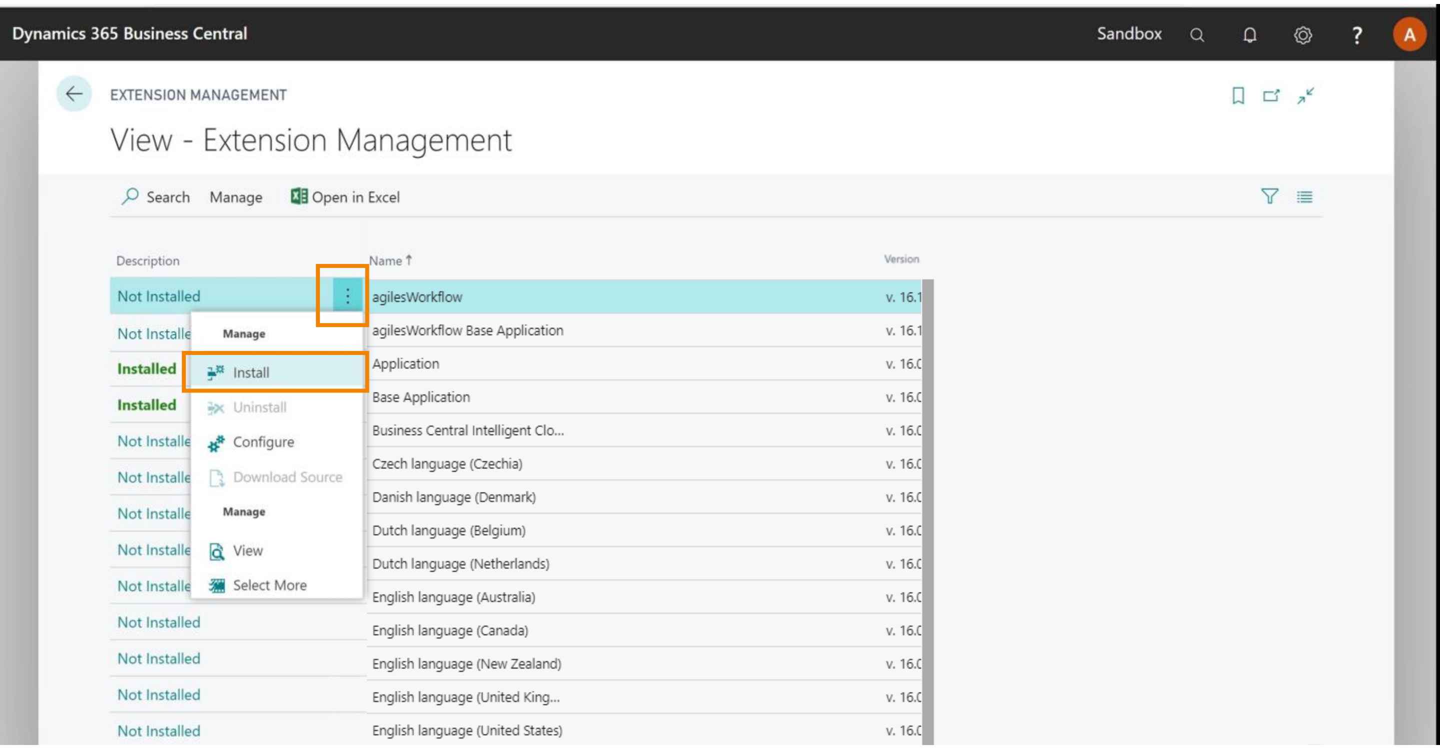
Basic Setup – Load Extension

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



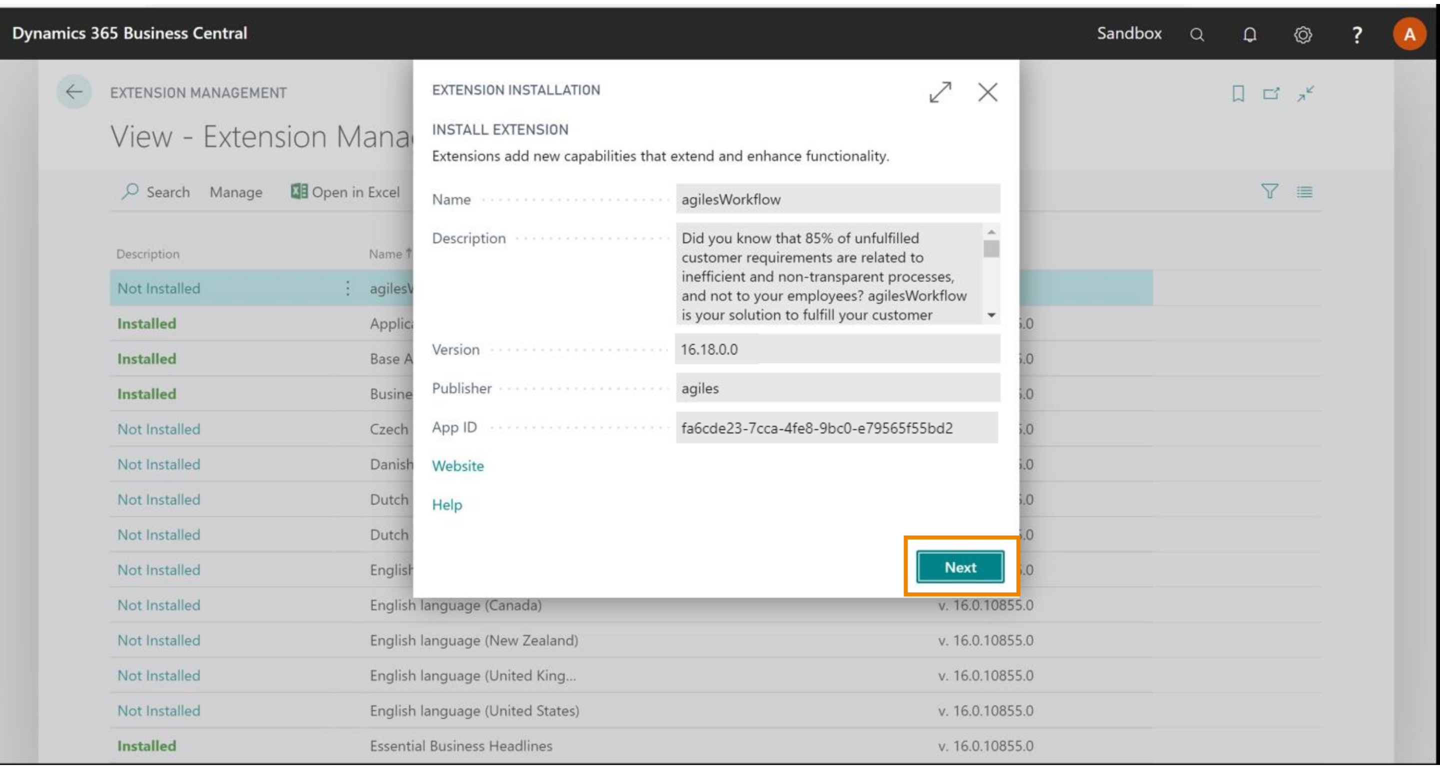
Basic Setup – Load Extension

1) Click on Install



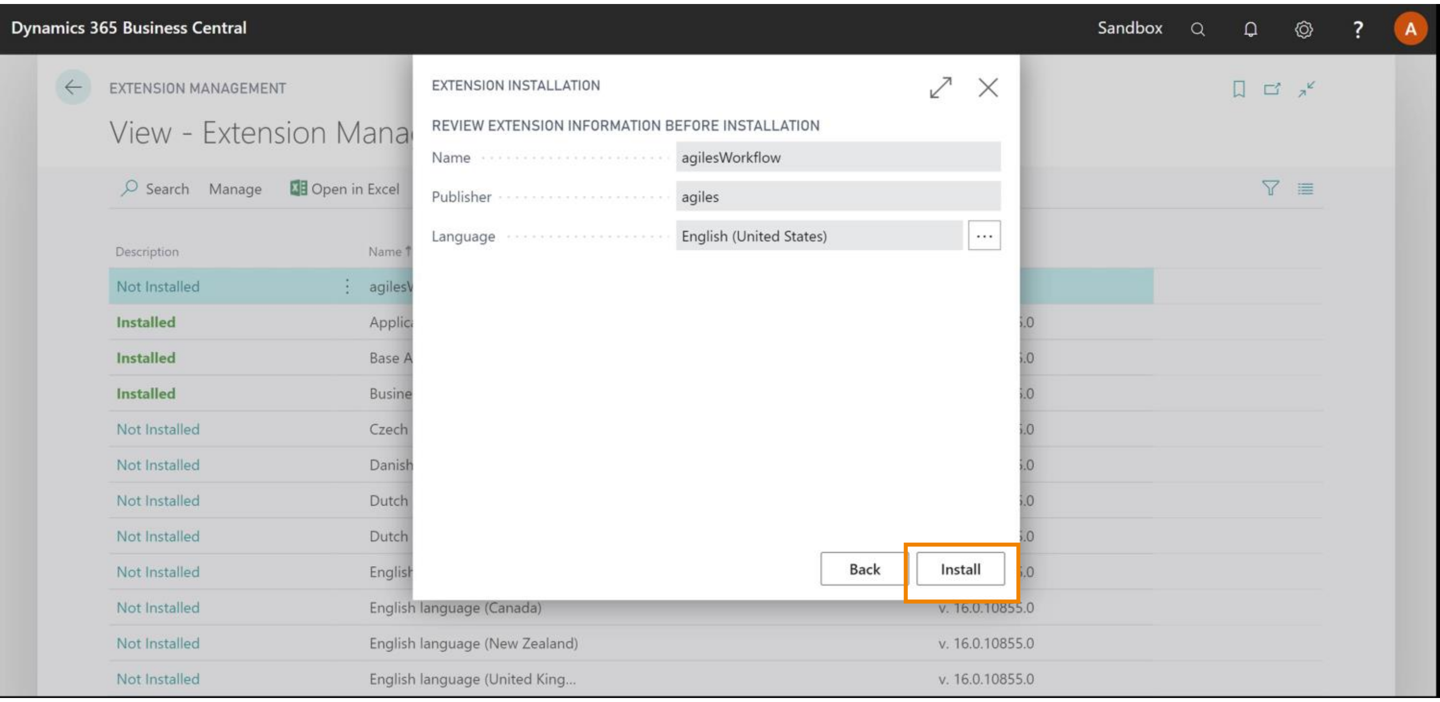
Basic Setup – Load Extension

1) Click on Next



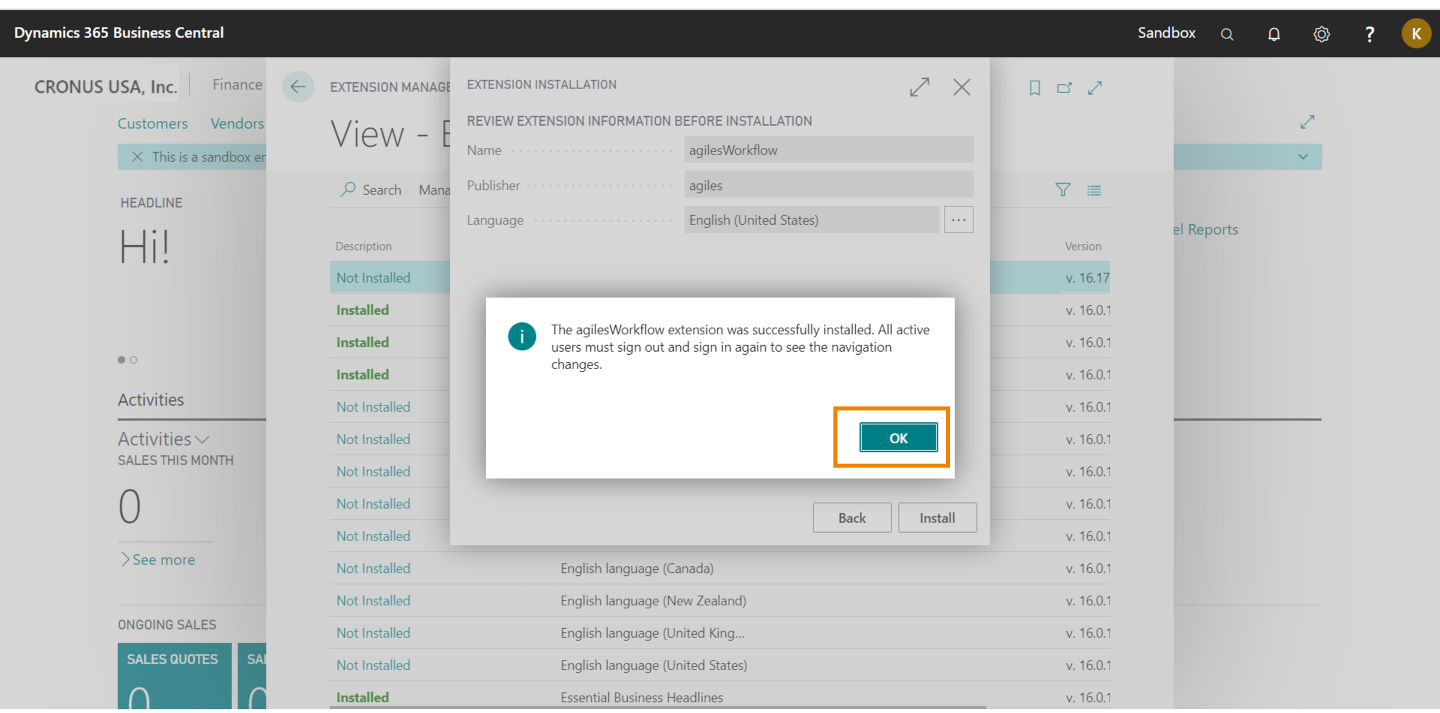
Basic Setup – Load Extension

1) Click on Install



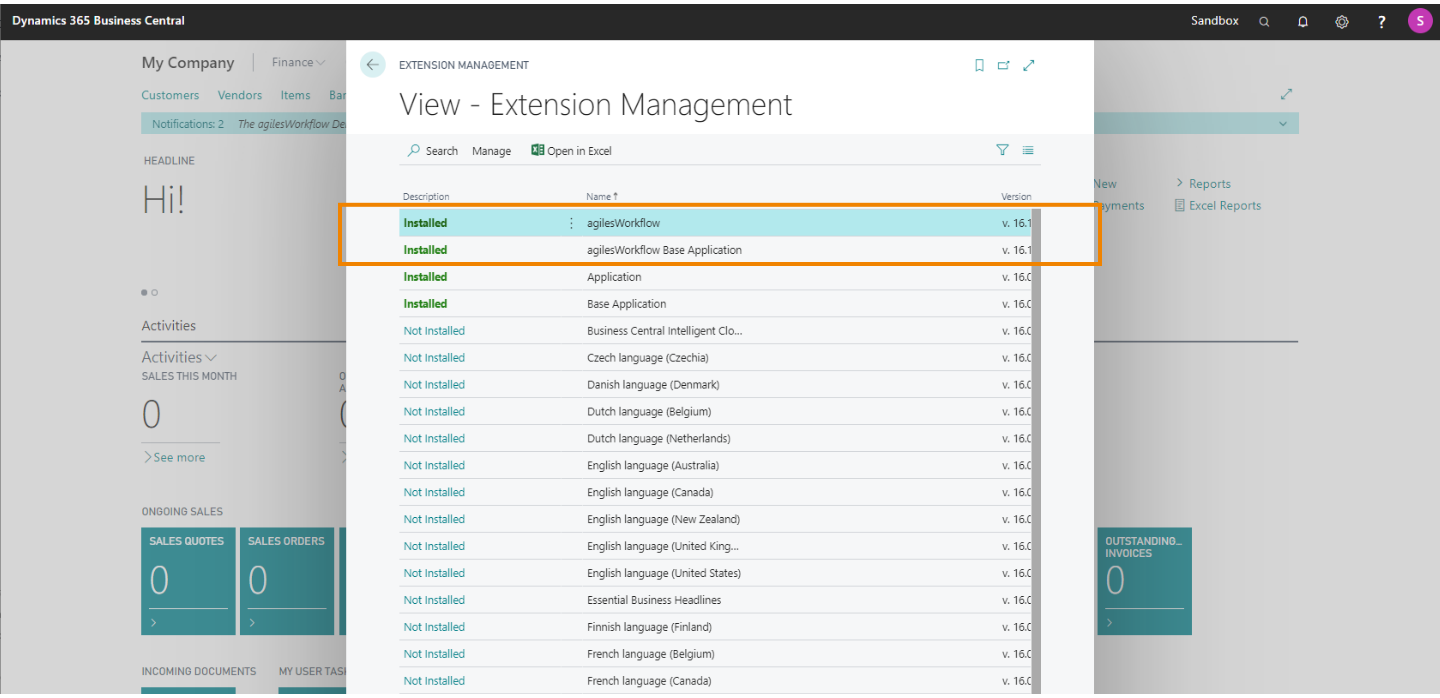
Basic Setup – Load Extension

1) Click on Ok



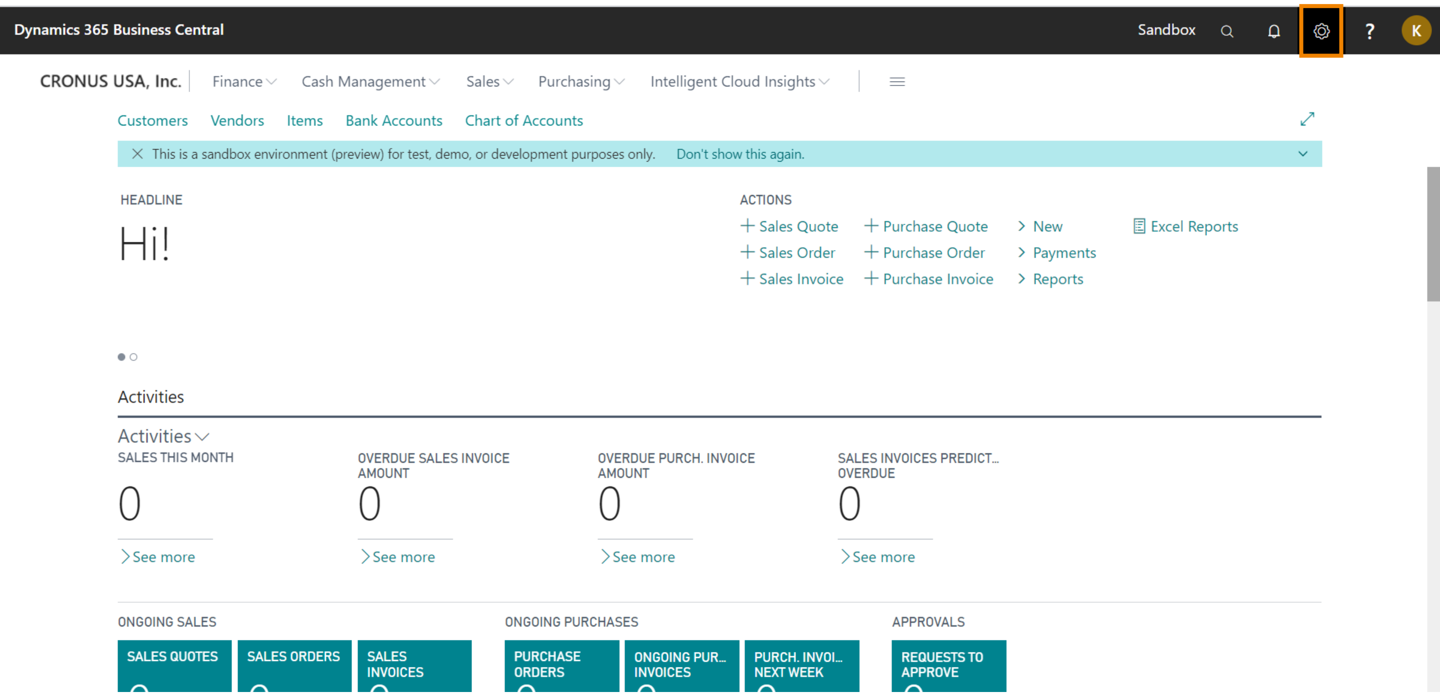
Basic Setup – Load Extension

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.



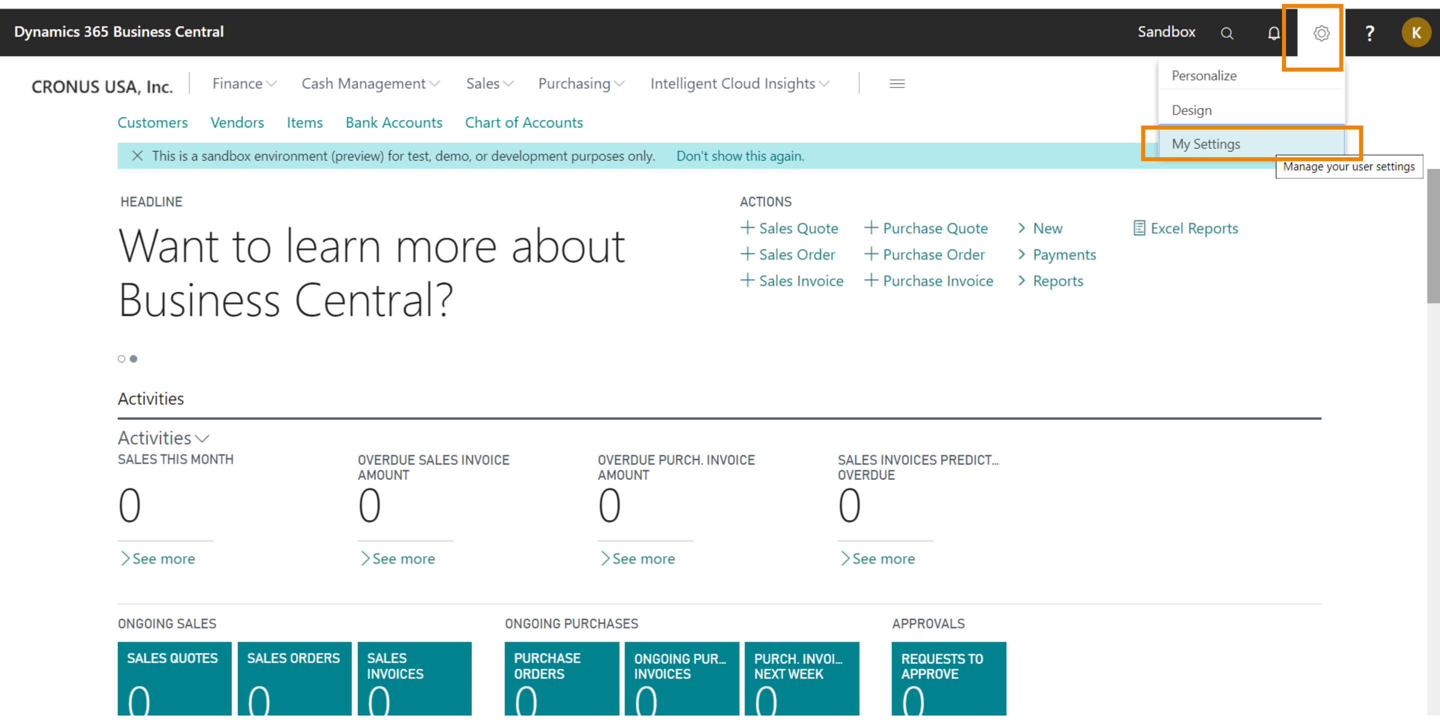
Basic Setup – Change Role Center

1) Click on Settings



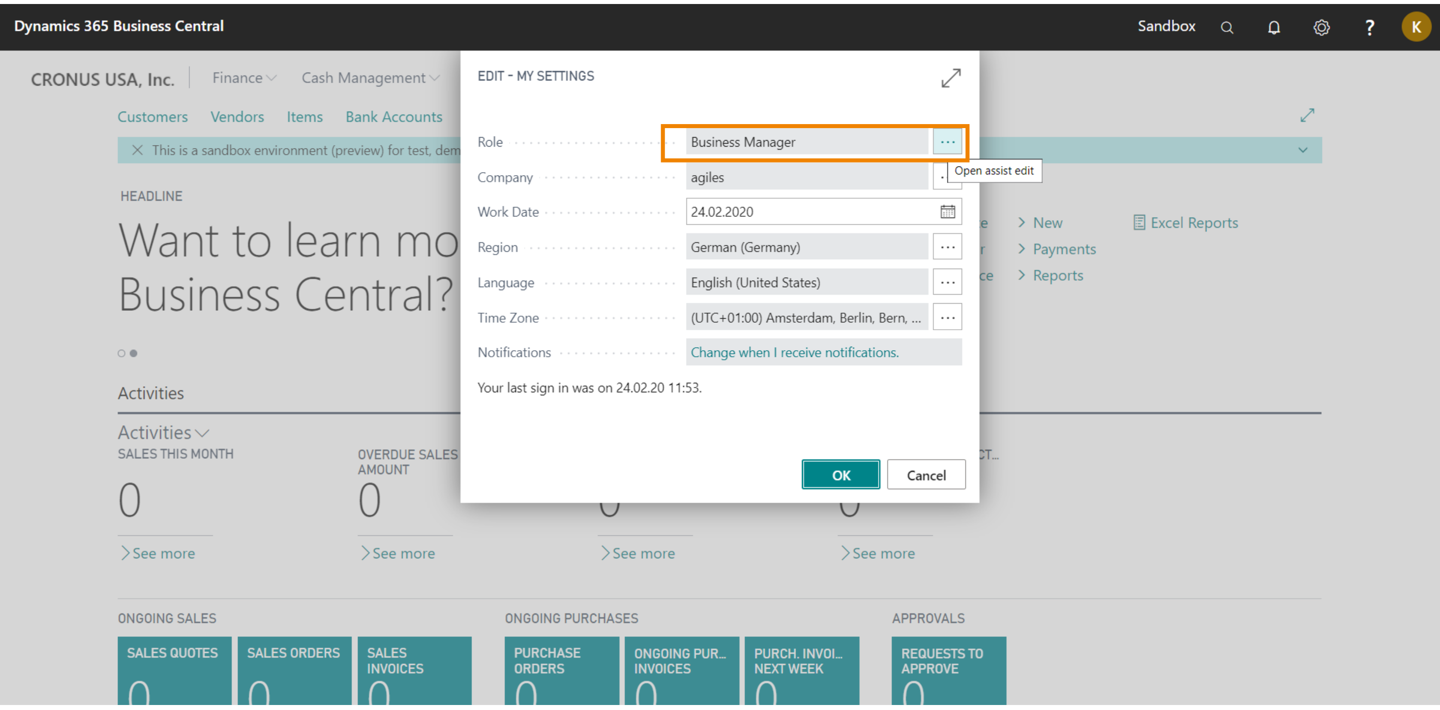
Basic Setup – Change Role Center

1) Click on Settings
2) Click on My Settings



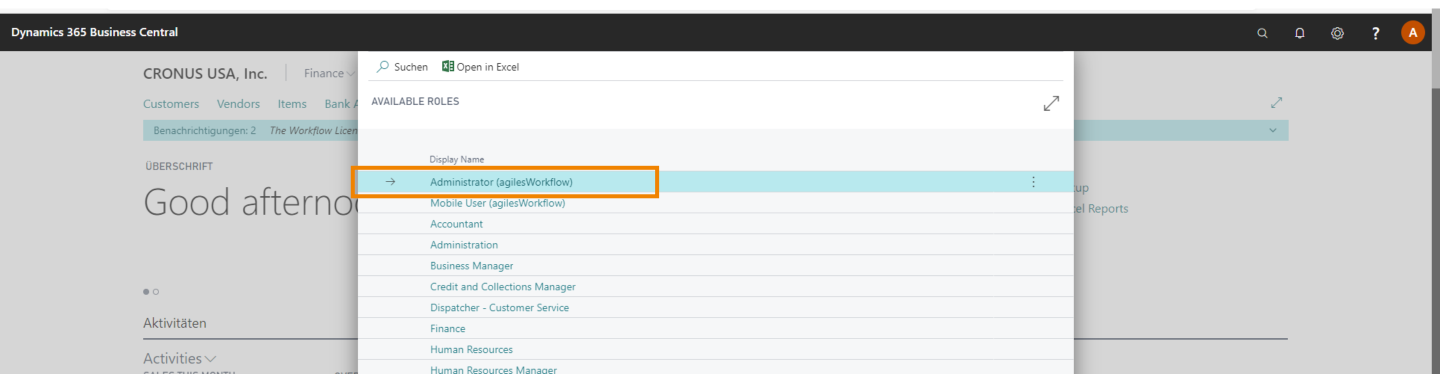
Basic Setup – Change Role Center

1) Use look up value



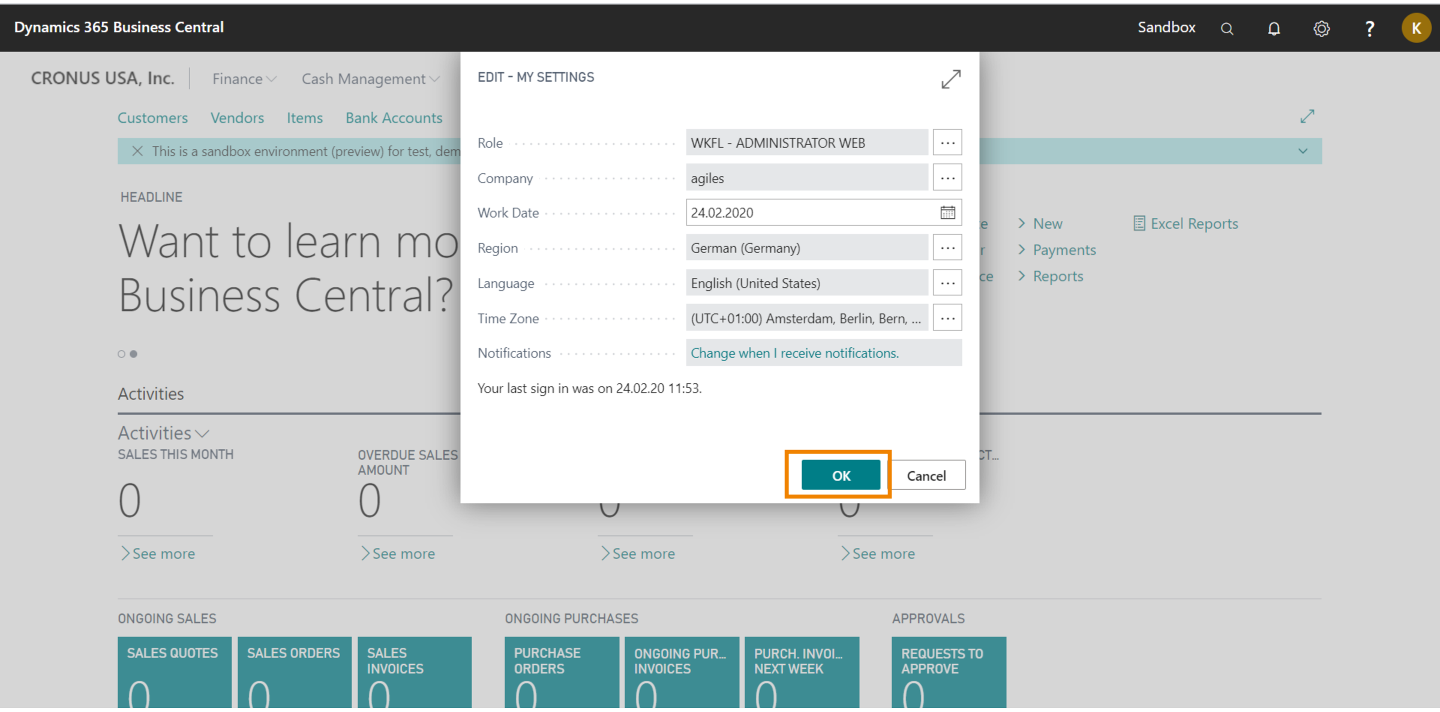
Basic Setup – Change Role Center

1) Select ADMINISTRATOR (Aptean Advanced Workflow)



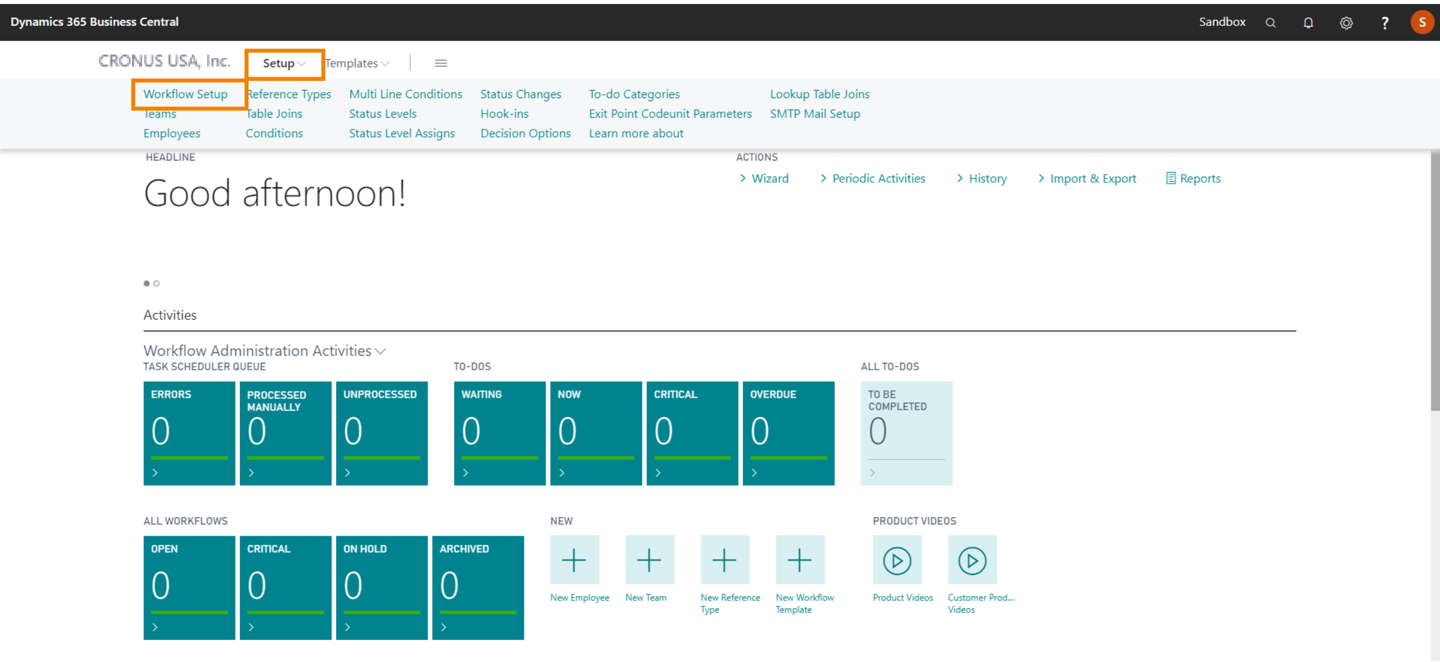
Basic Setup – Change Role Center

1) Click on Ok



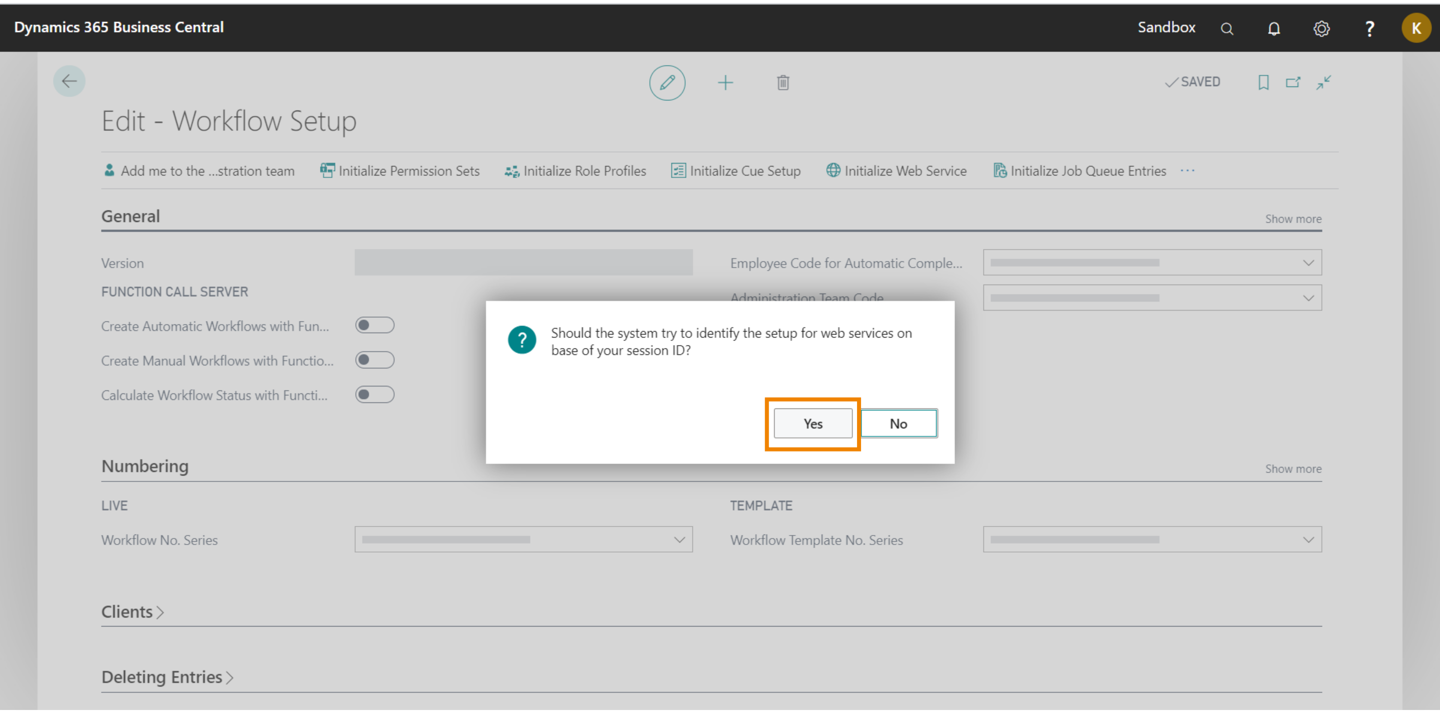
Basic Setup

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



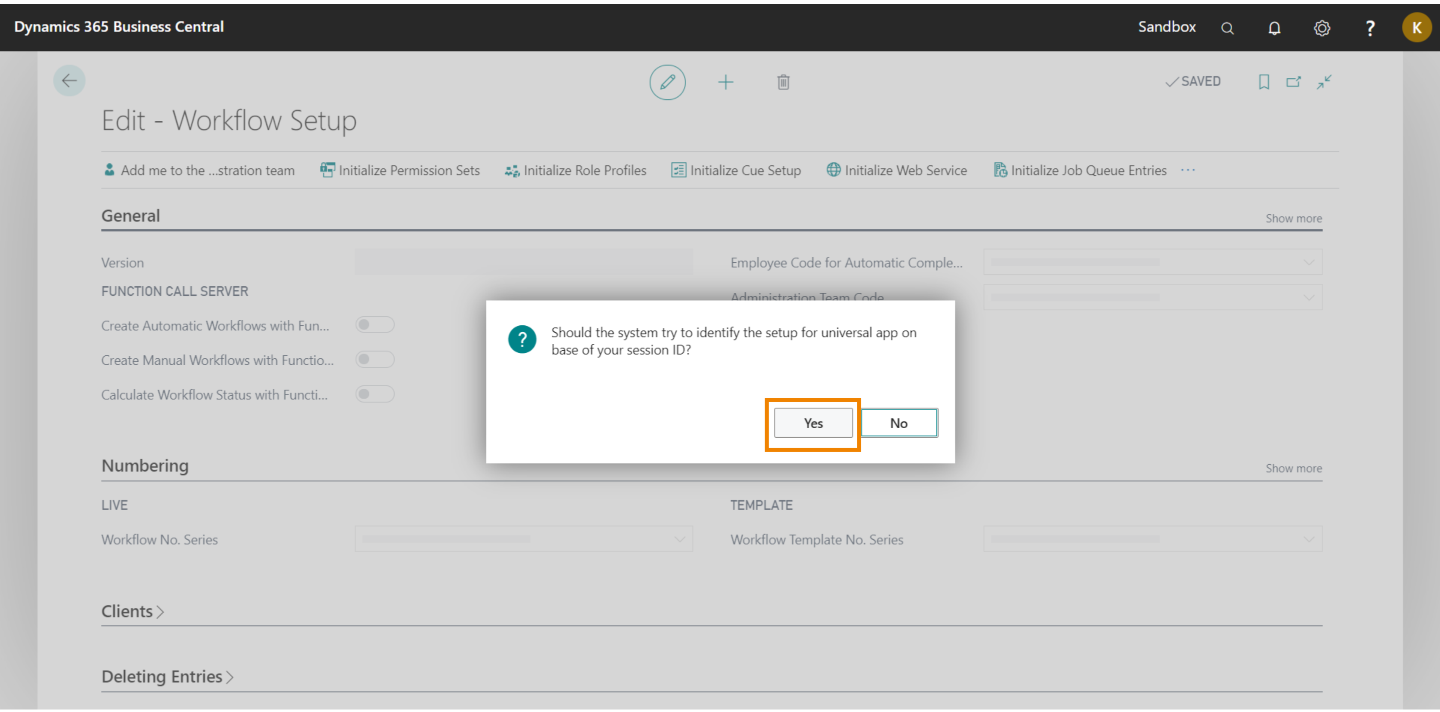
Basic Setup

1) Click Yes



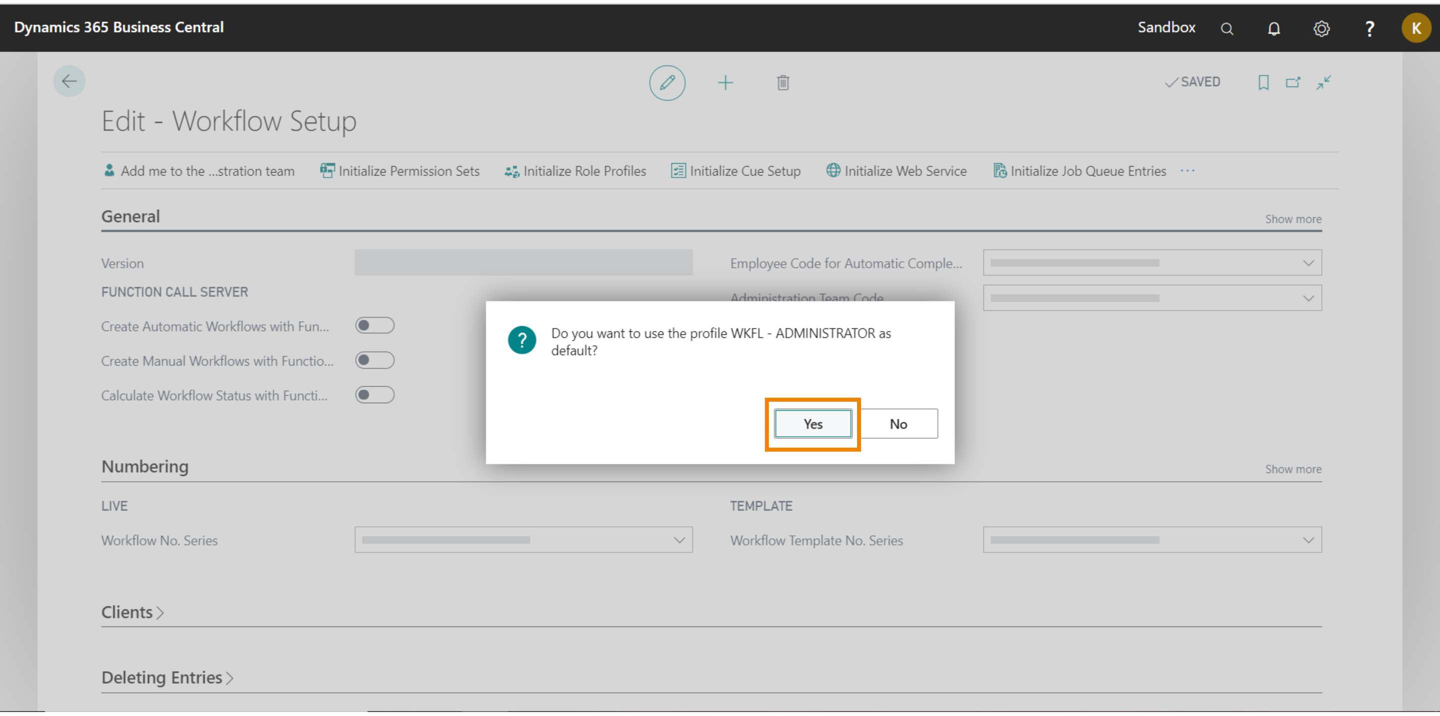
Basic Setup

1) Click Yes



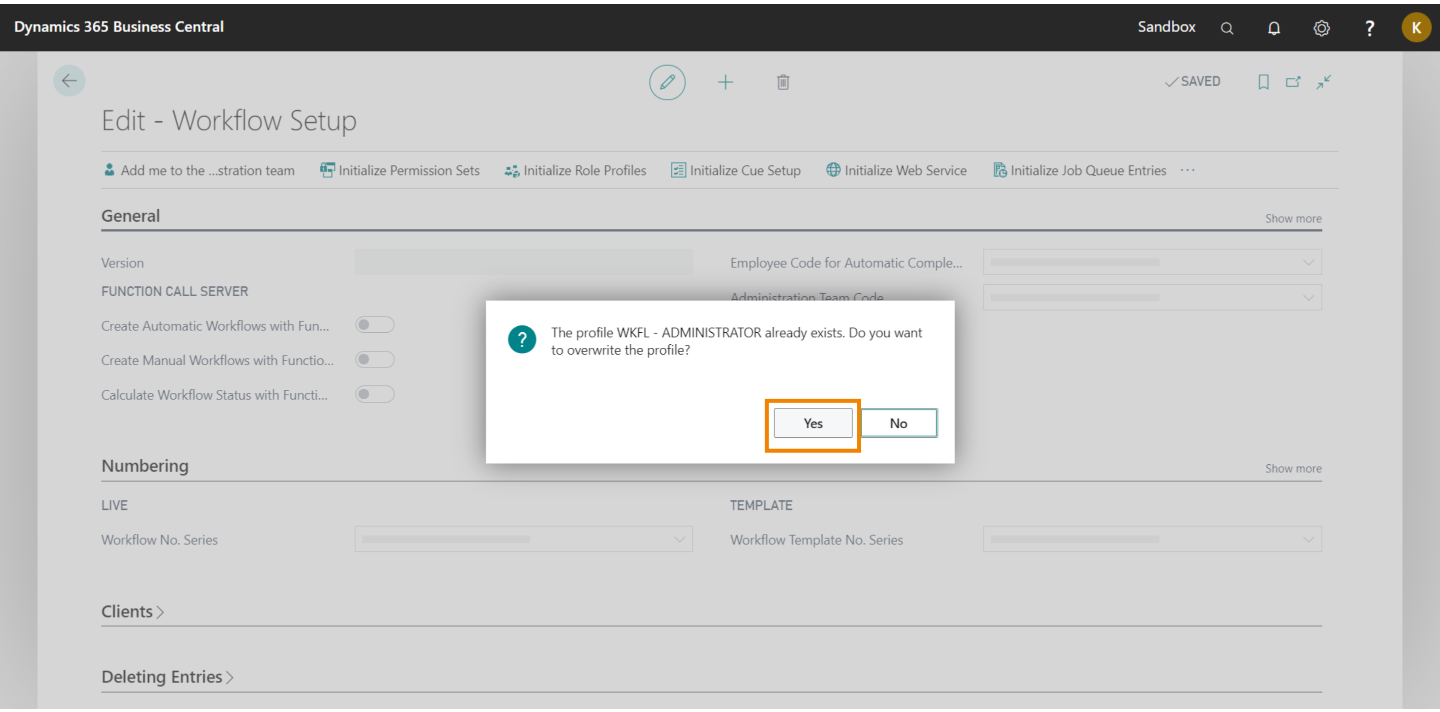
Basic Setup

1) Click Yes



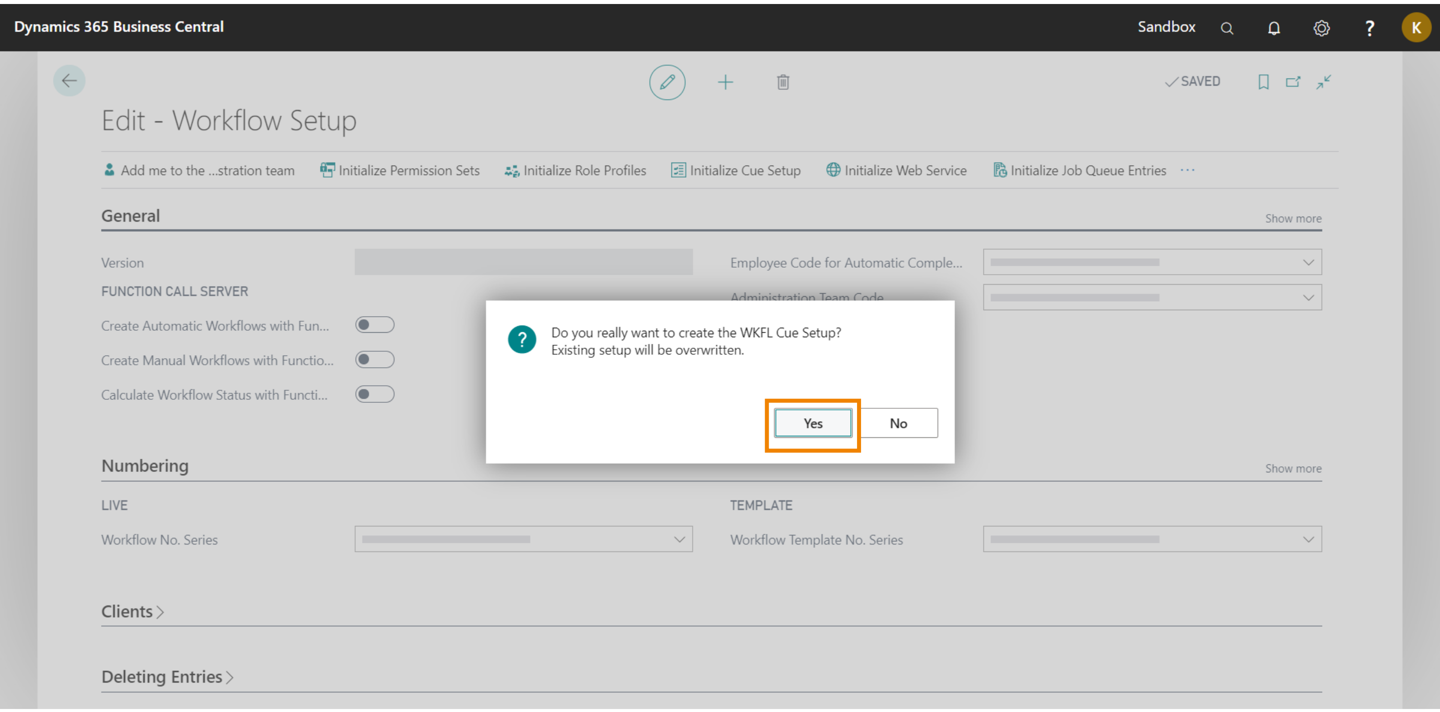
Basic Setup

1) Click Yes



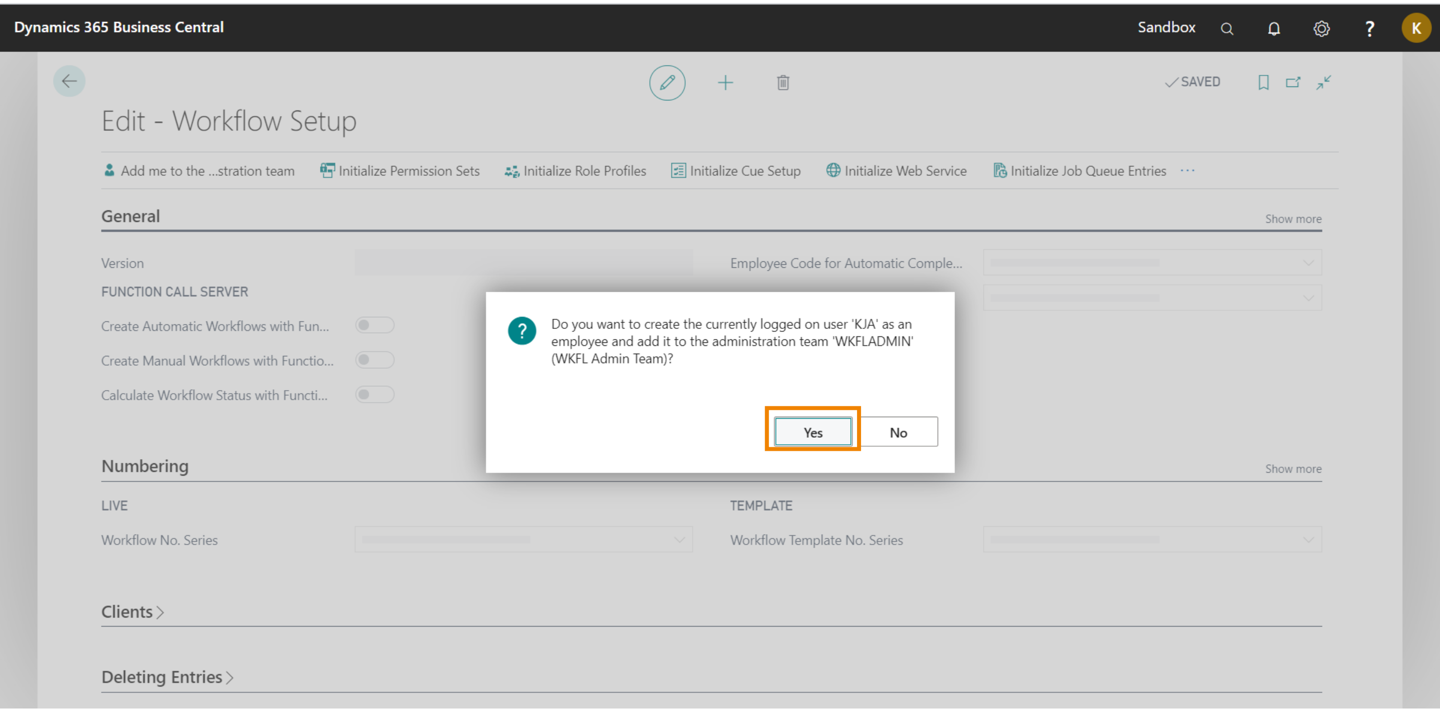
Basic Setup

1) Click Yes



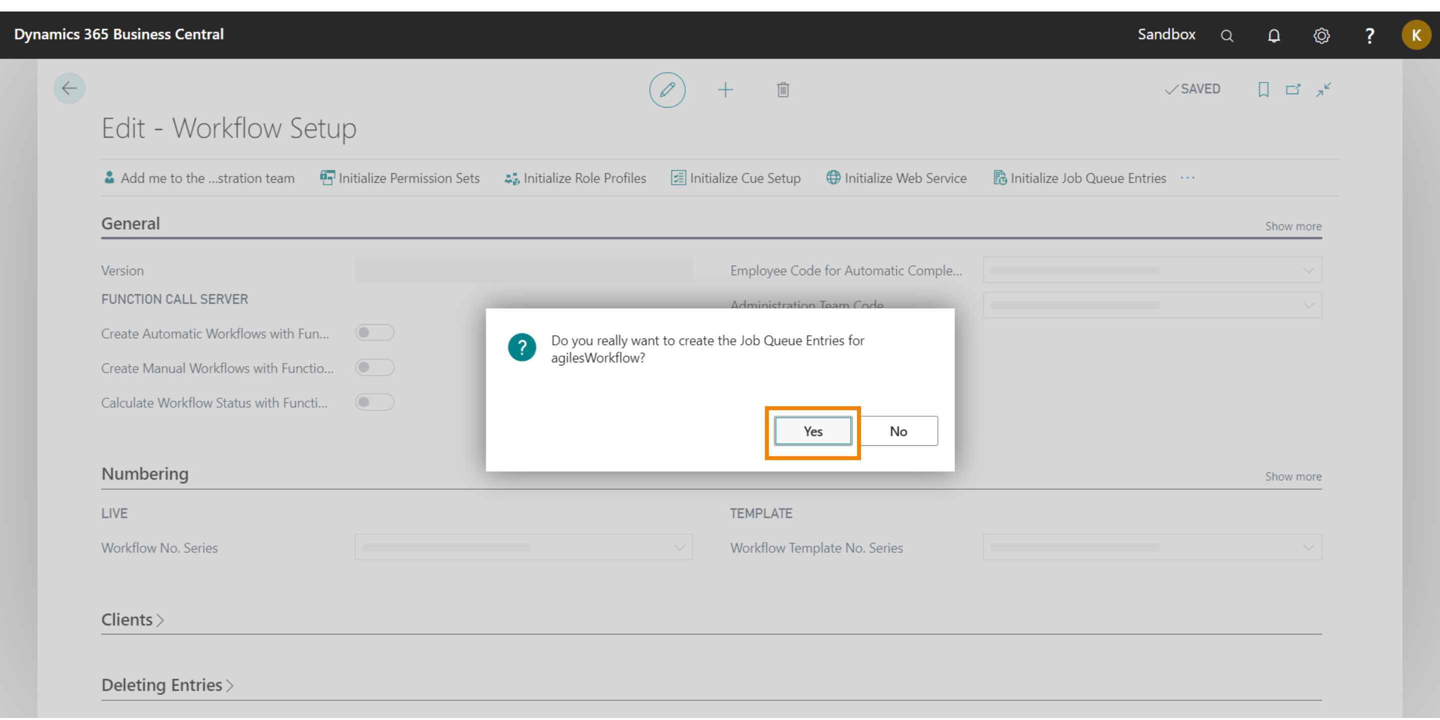
Basic Setup

1) Click Yes



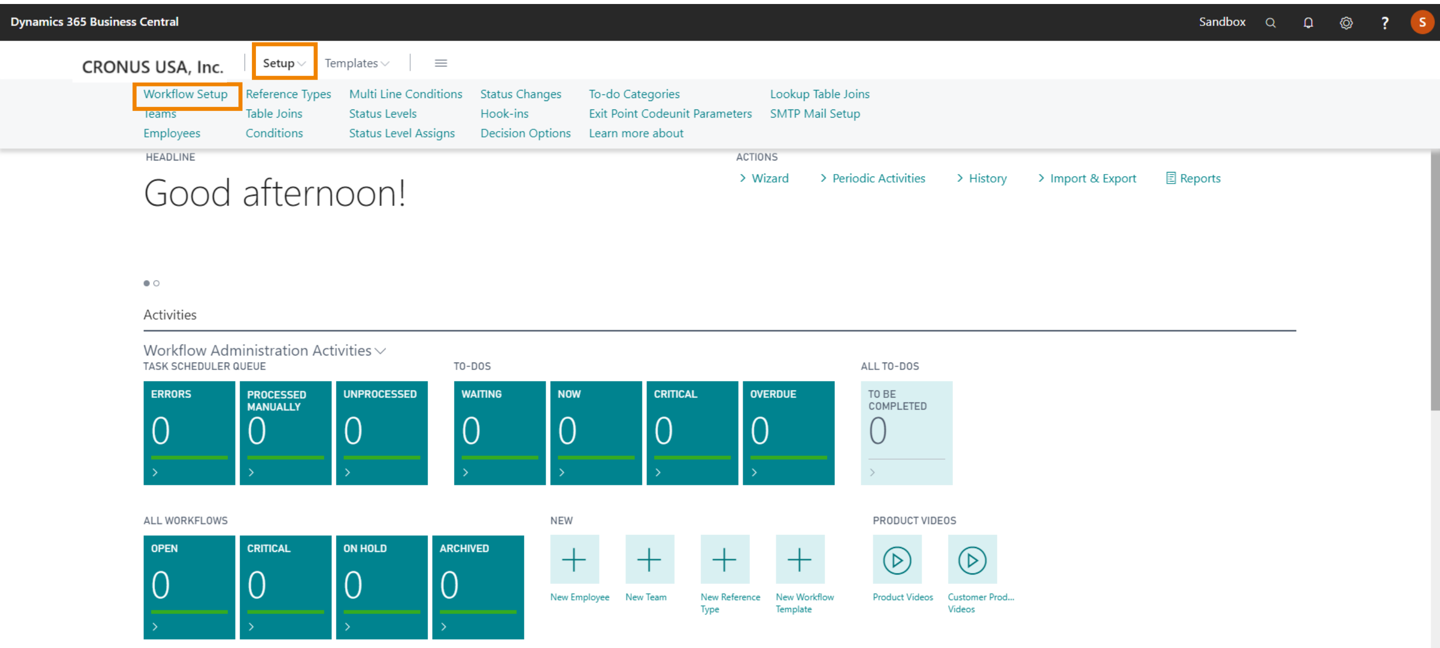
Basic Setup

1) Click Yes



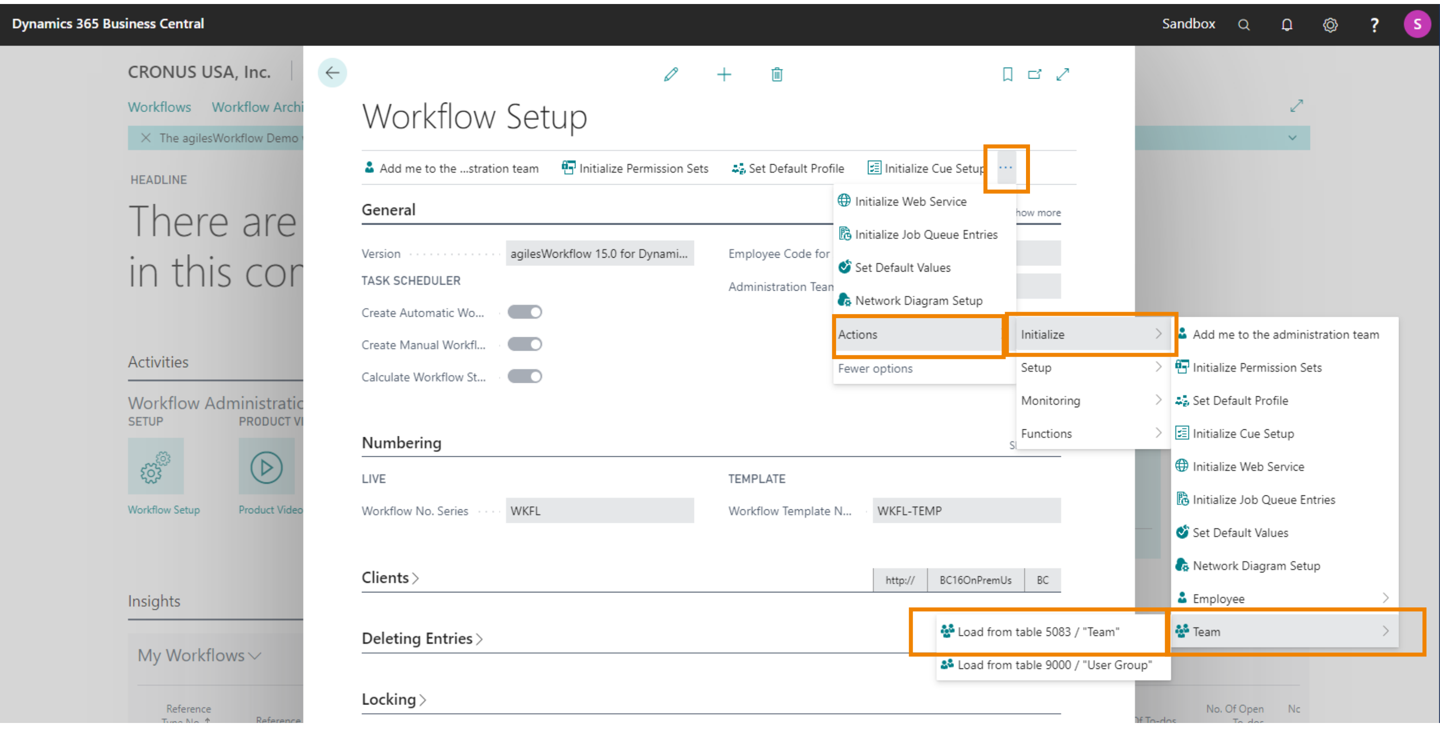
Basic Setup – Load Teams and Employees

1) Click on Setup
2) Click on Workflow Setup



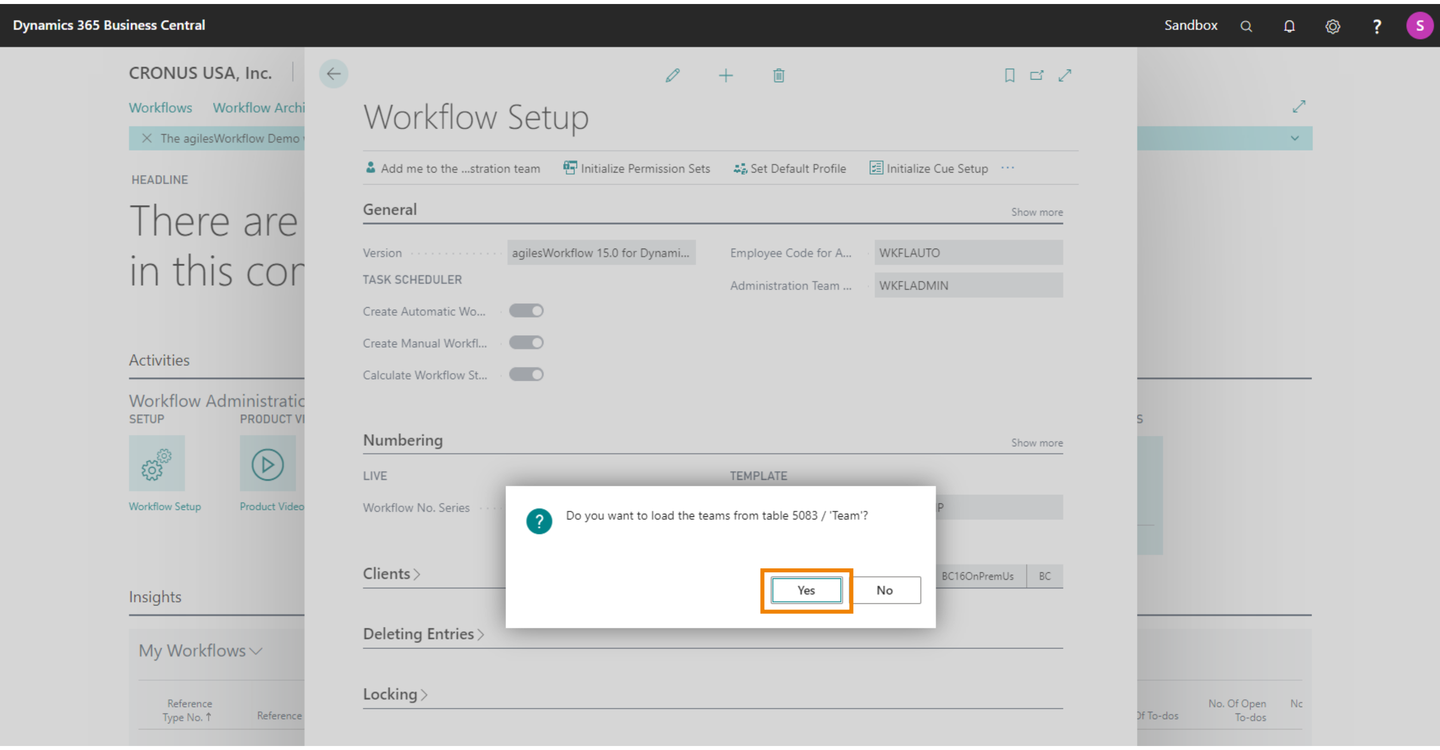
Basic Setup – Load Teams and Employees

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“



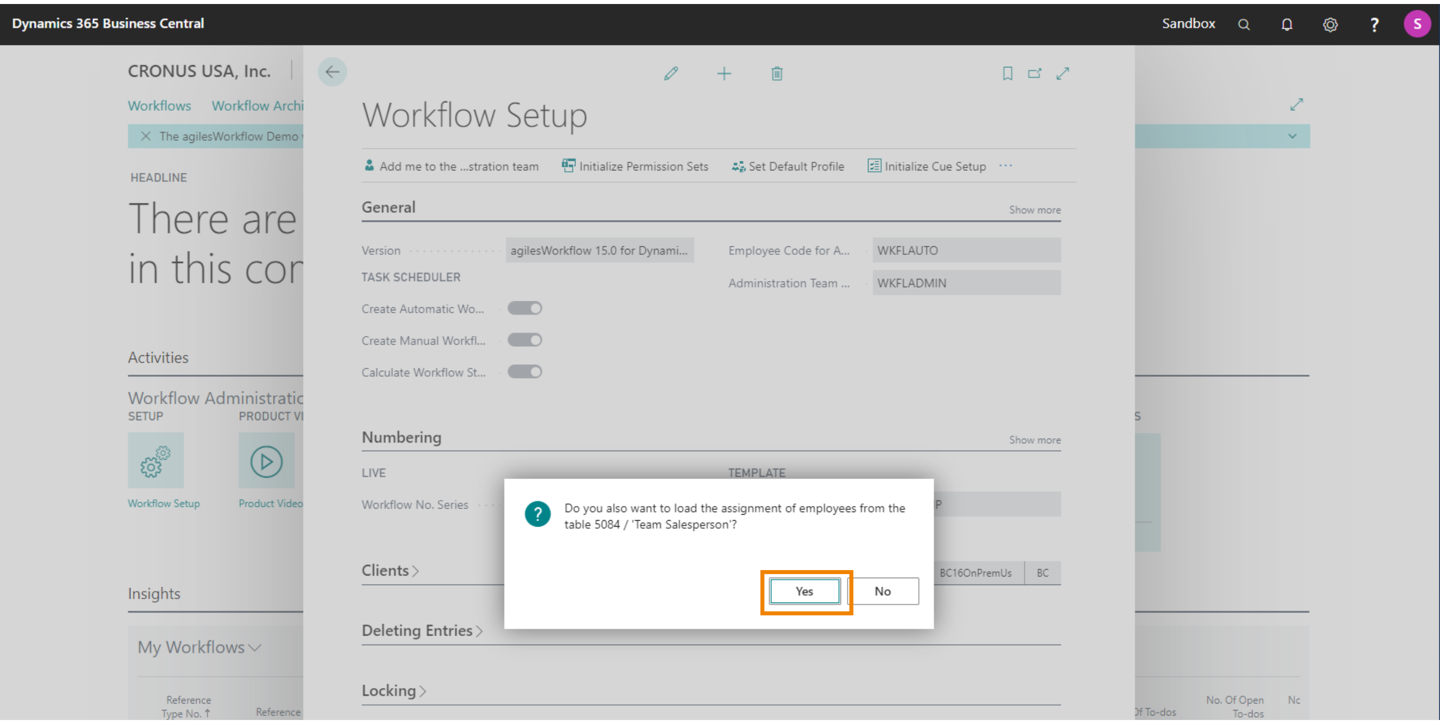
Basic Setup – Load Teams and Employees

1) Click on Yes



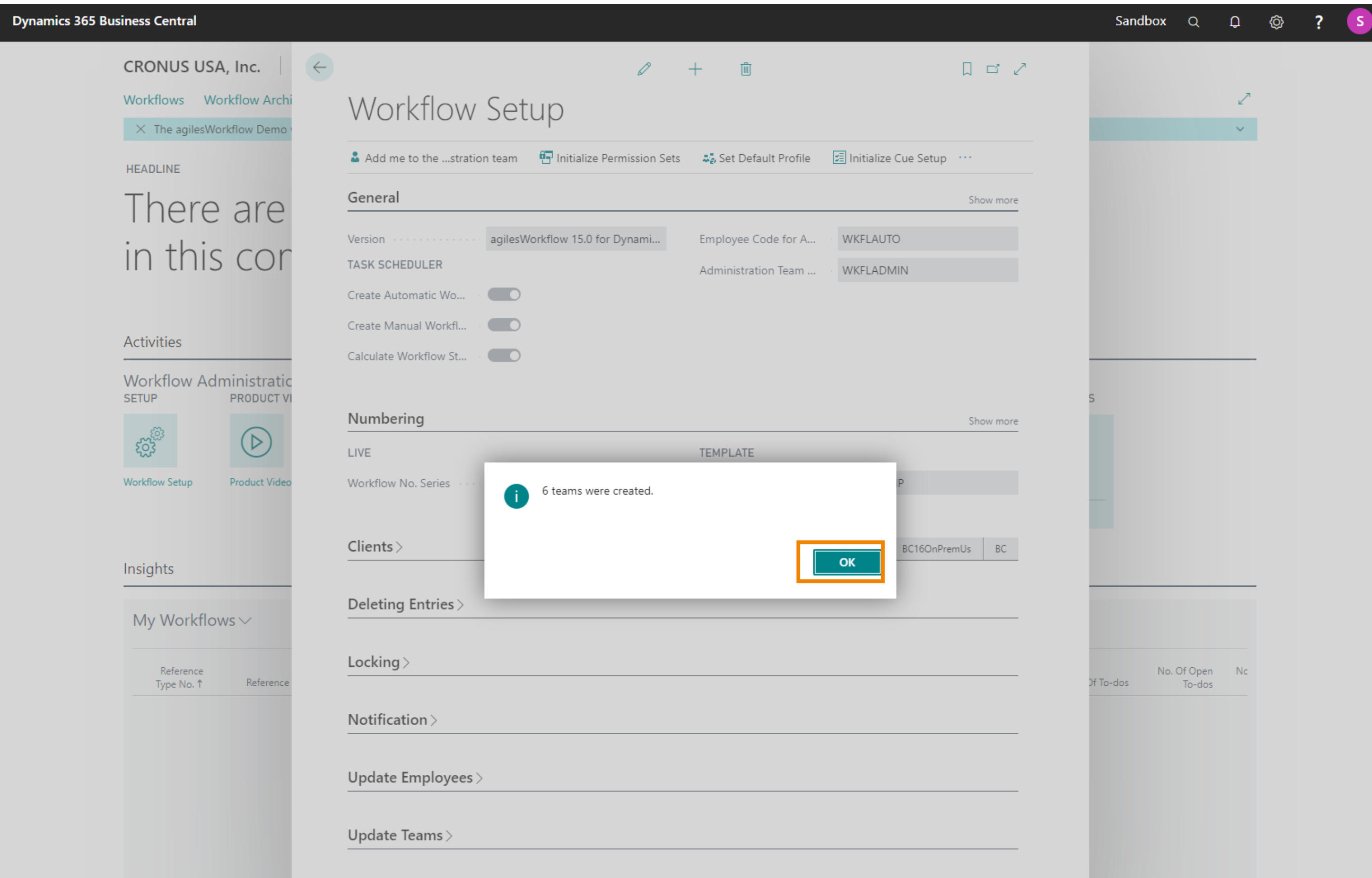
Basic Setup – Load Teams and Employees

1) Click on Yes



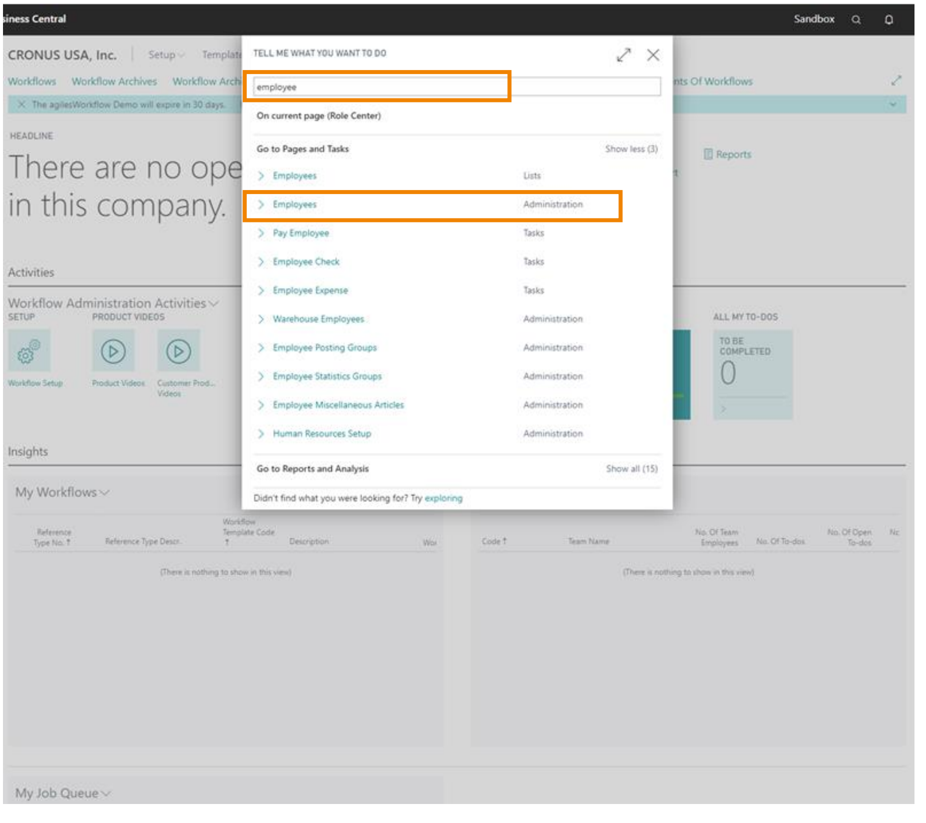
Basic Setup – Load Teams and Employees

1) Click on Ok



Basic Setup – Load Teams and Employees

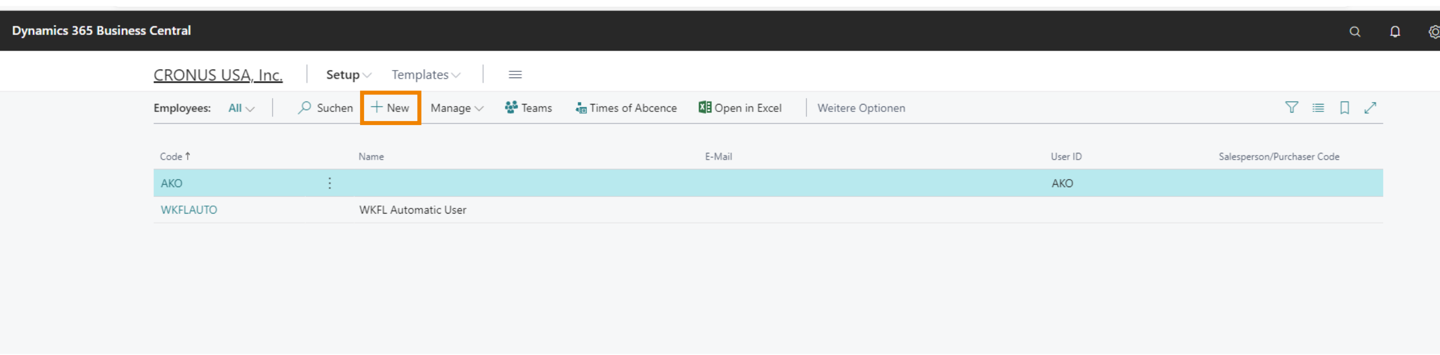
1) Search for Employees
2) Click on Employees



Basic Setup – Load Teams and Employees

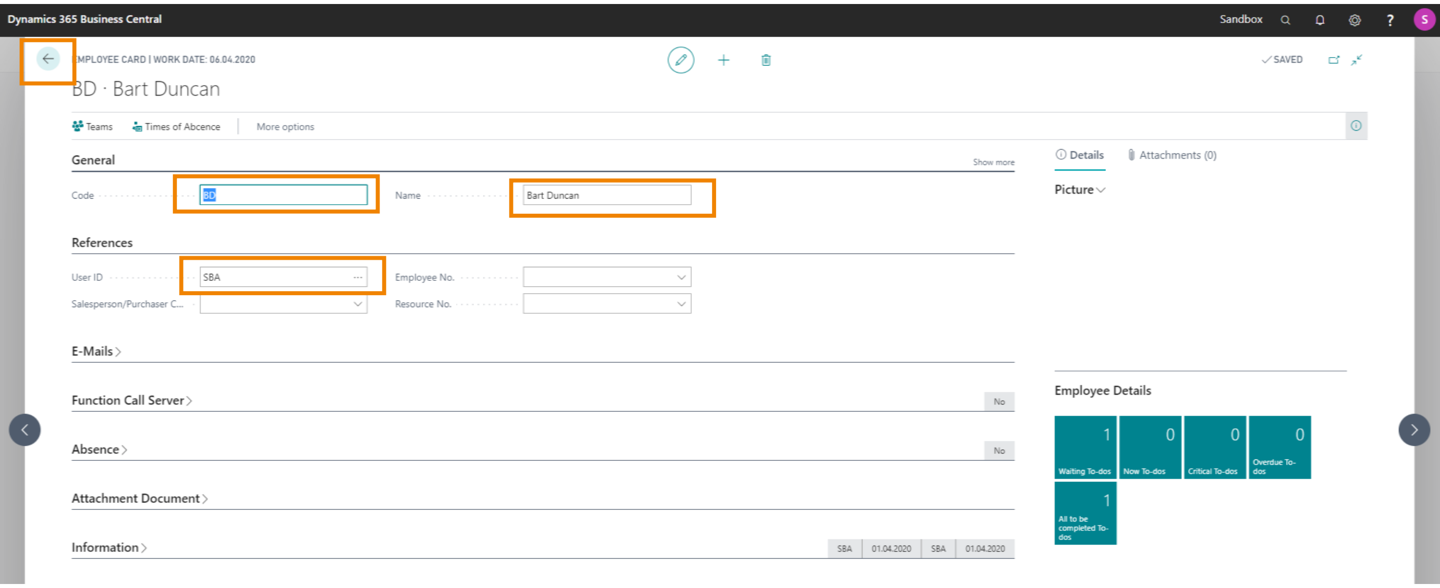
1) Enter Salesperson Code in Aptean Employee Table for later use: BD Bart Duncan, AH Annette Hill:

2) Click on +New



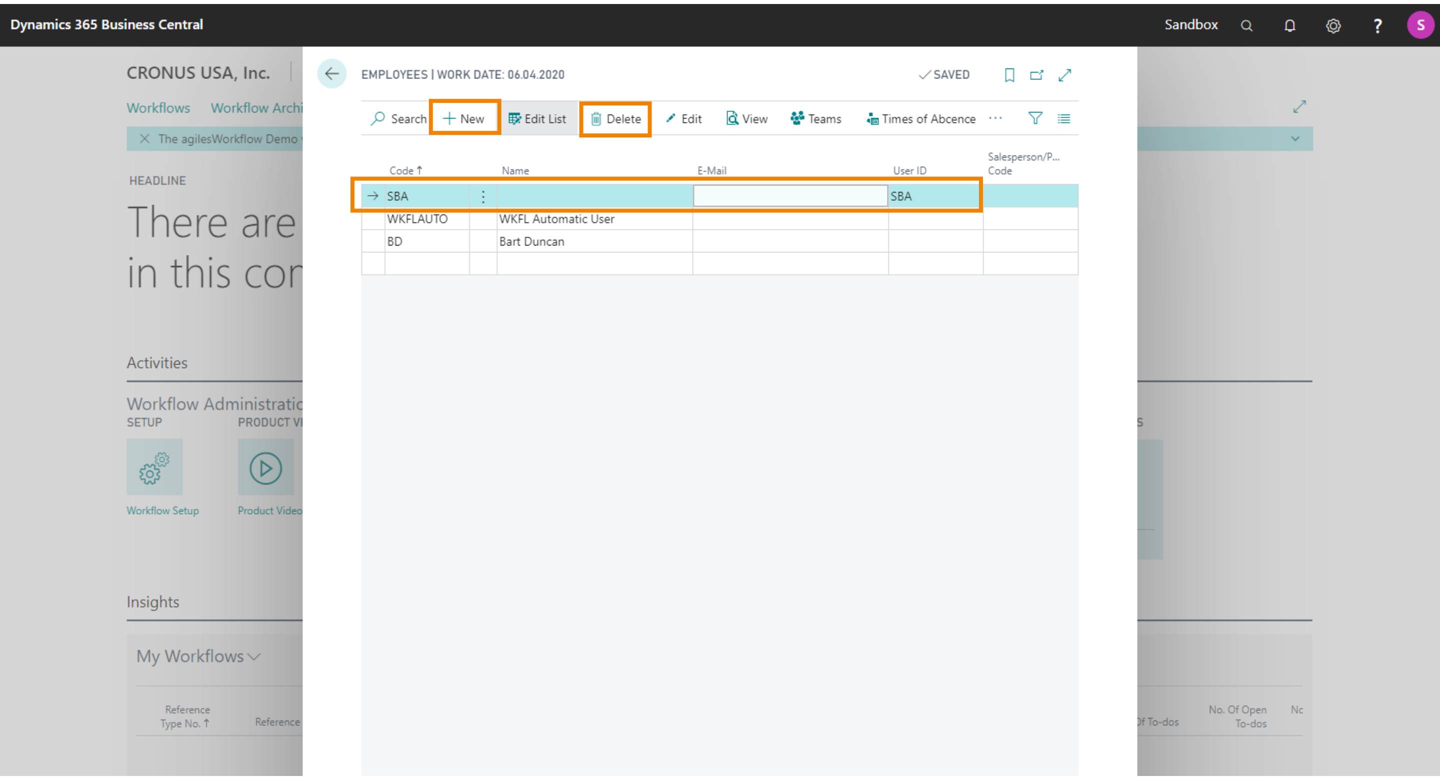
Basic Setup – Load Teams and Employees

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



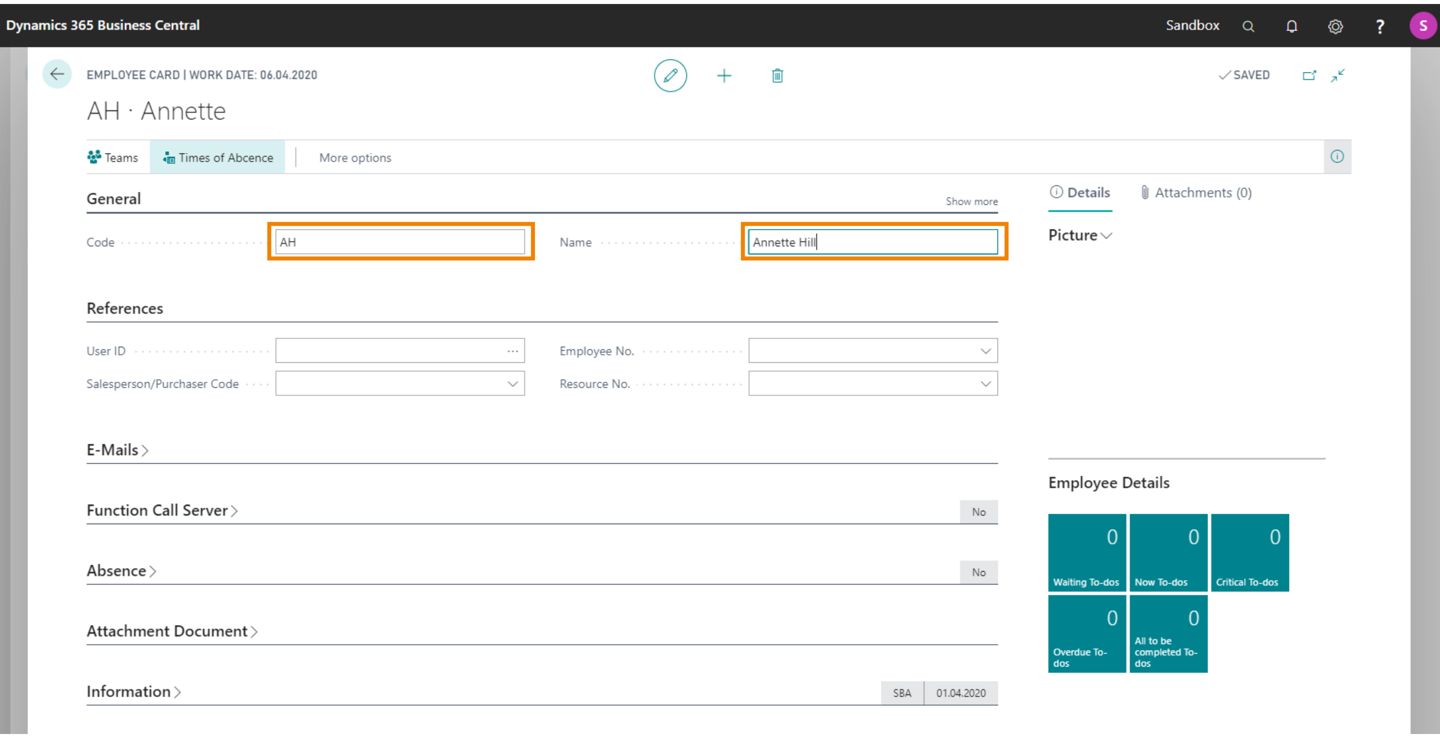
Basic Setup – Load Teams and Employees

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



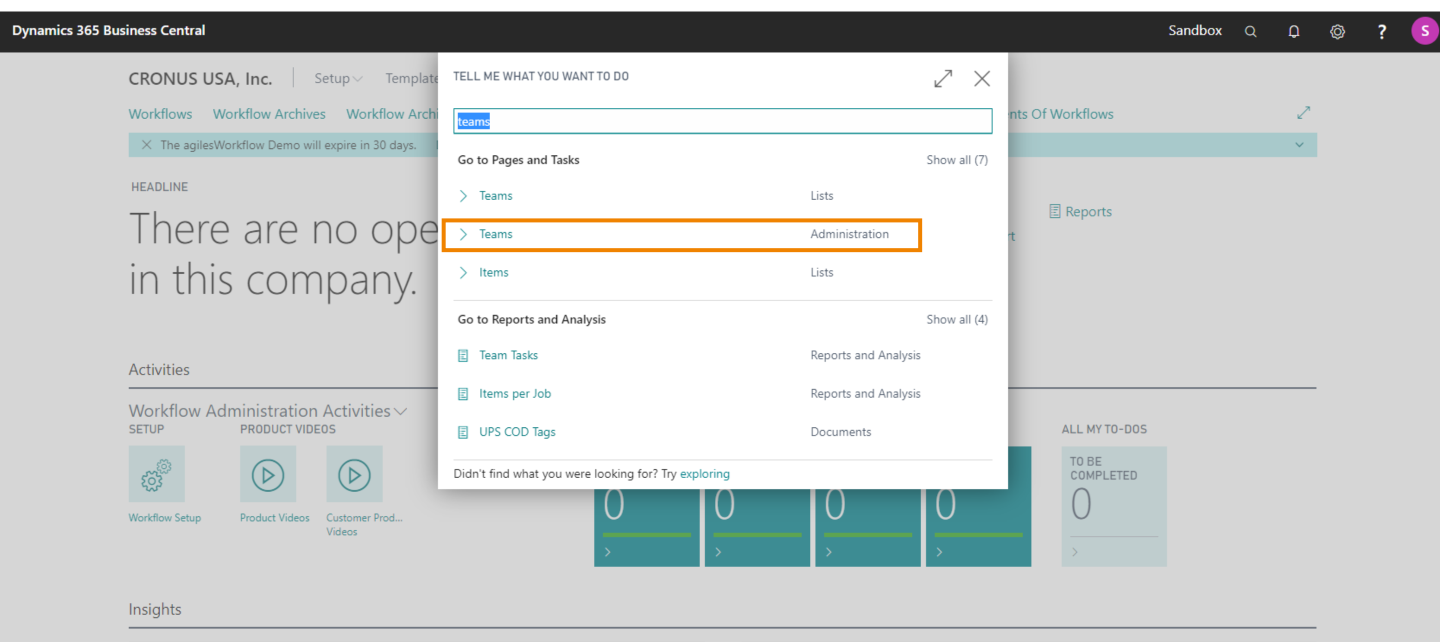
Basic Setup – Load Teams and Employees

1) Enter Code AH
2) Enter Name Annette Hill



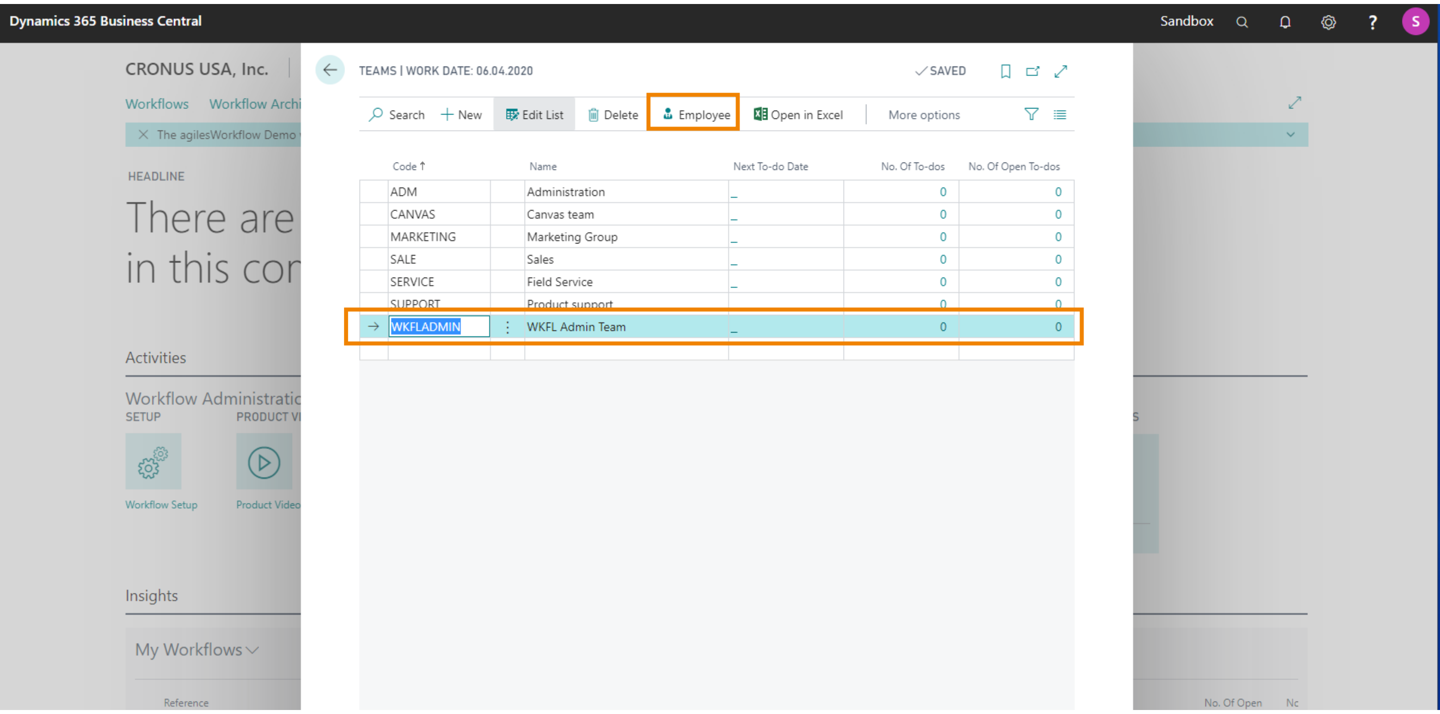
Basic Setup – Load Teams and Employees

1) Search for Teams
2) Click on Teams



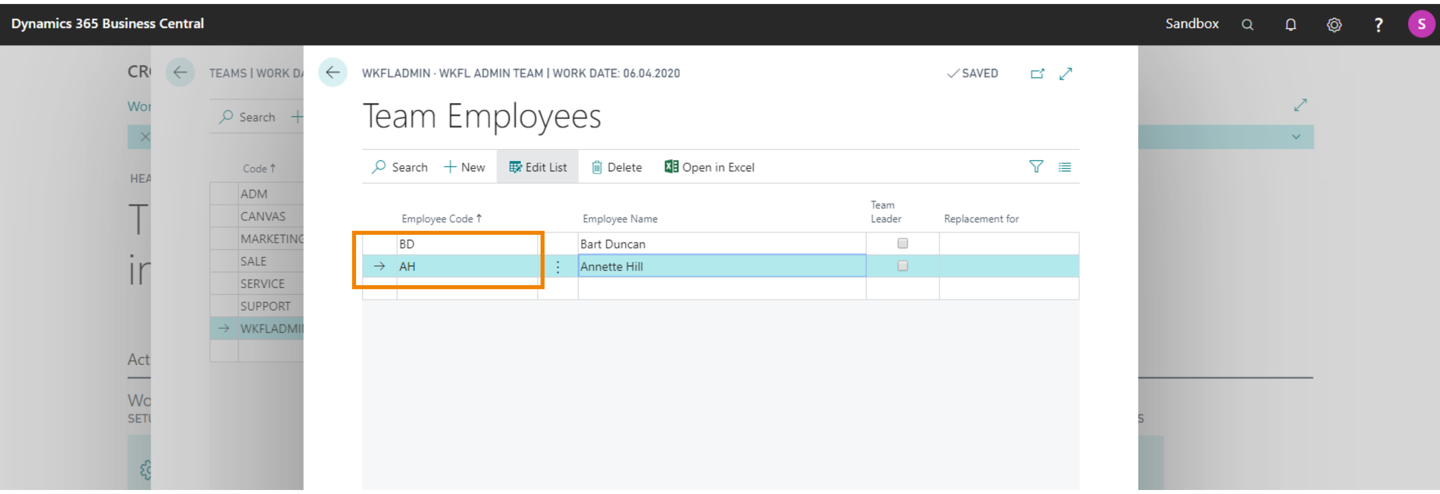
Basic Setup – Load Teams and Employees

1) Select Workflow Admin
2) Click on Employee



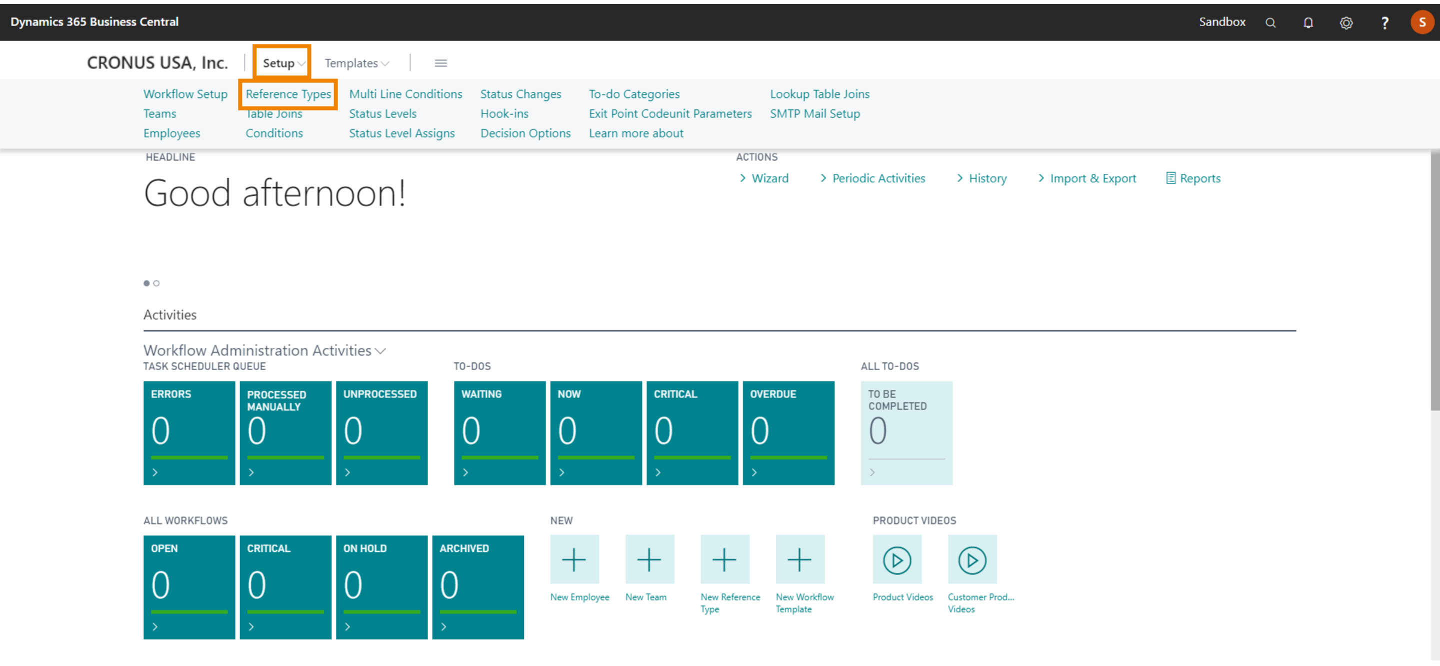
Basic Setup – Load Teams and Employees

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



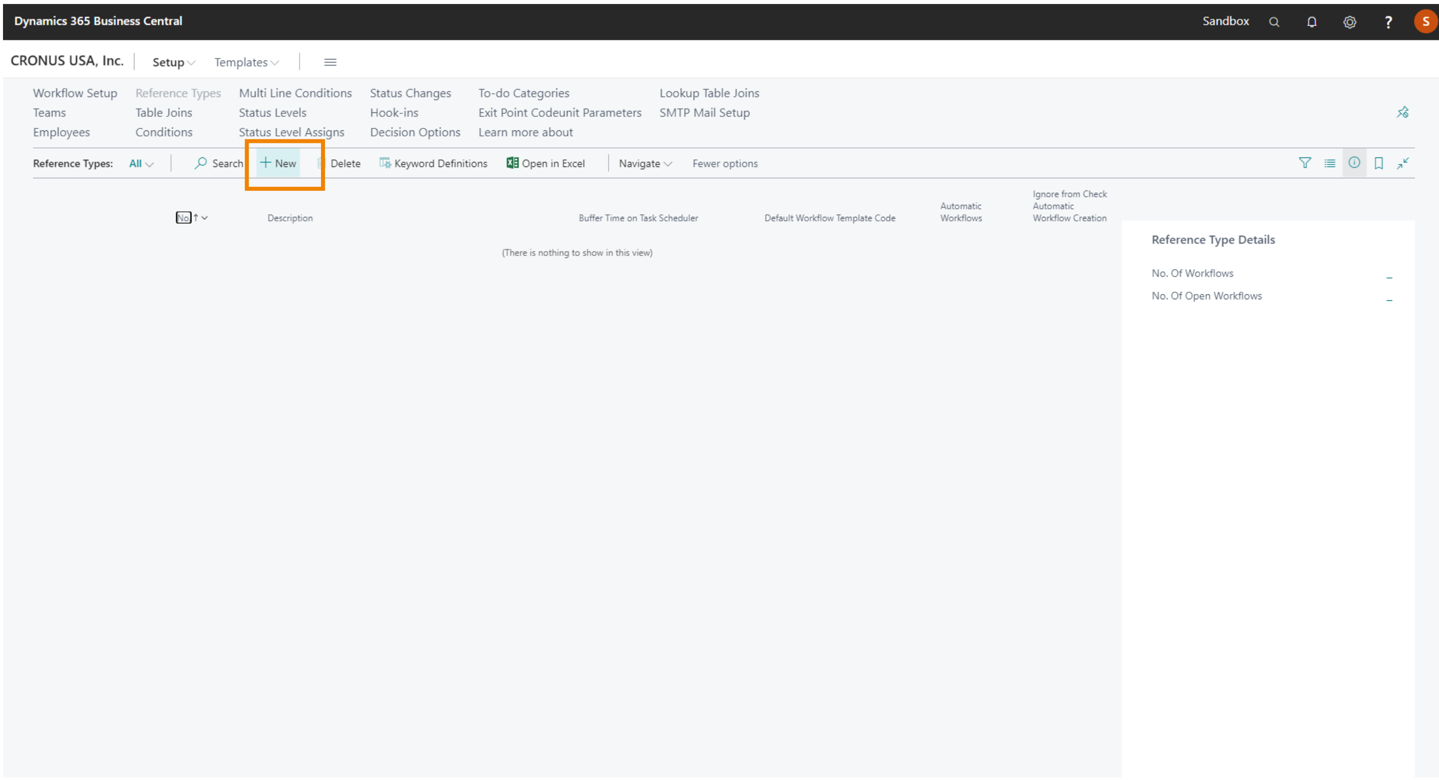
Basic Setup

1) Click on Setup
2) Click on Reference Types



Basic Setup

1) Click on +New



Basic Setup

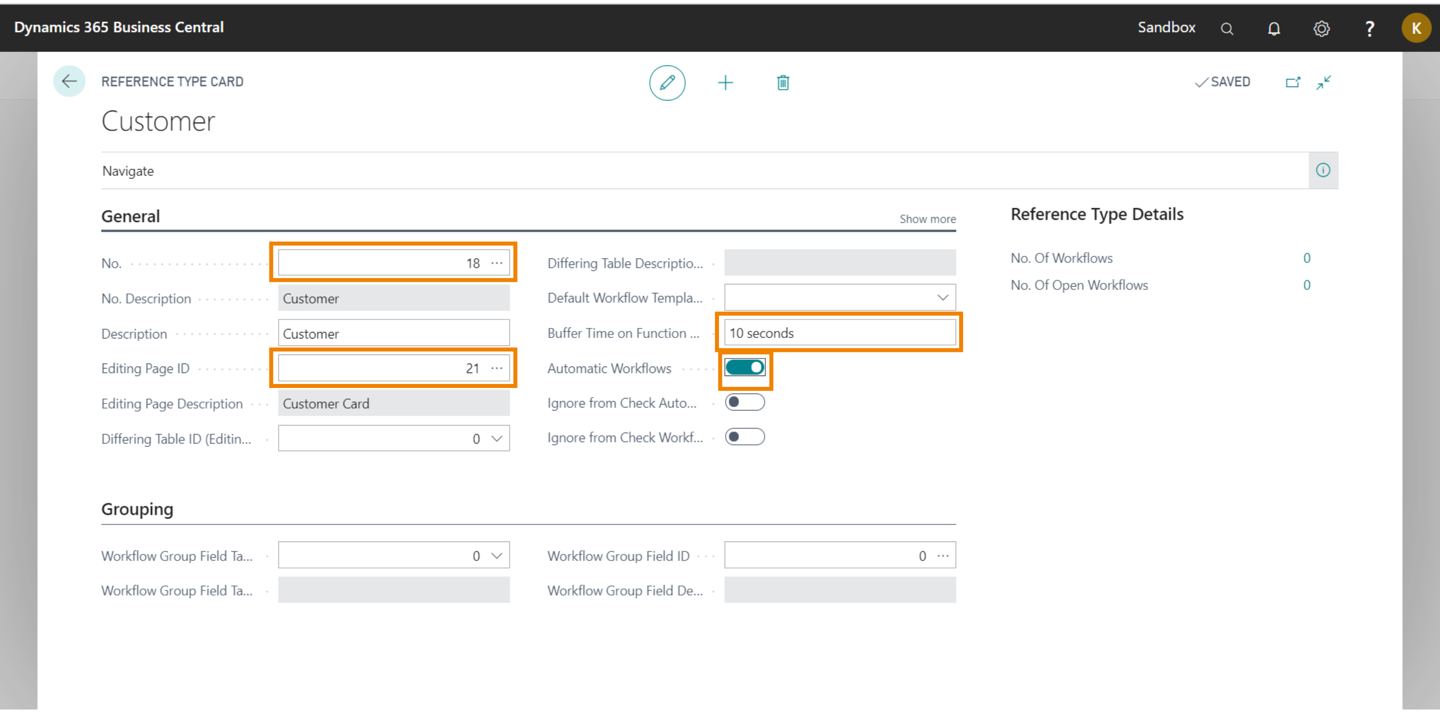
1) **General:**

Select No. → 18

Select Editing Page ID → 21

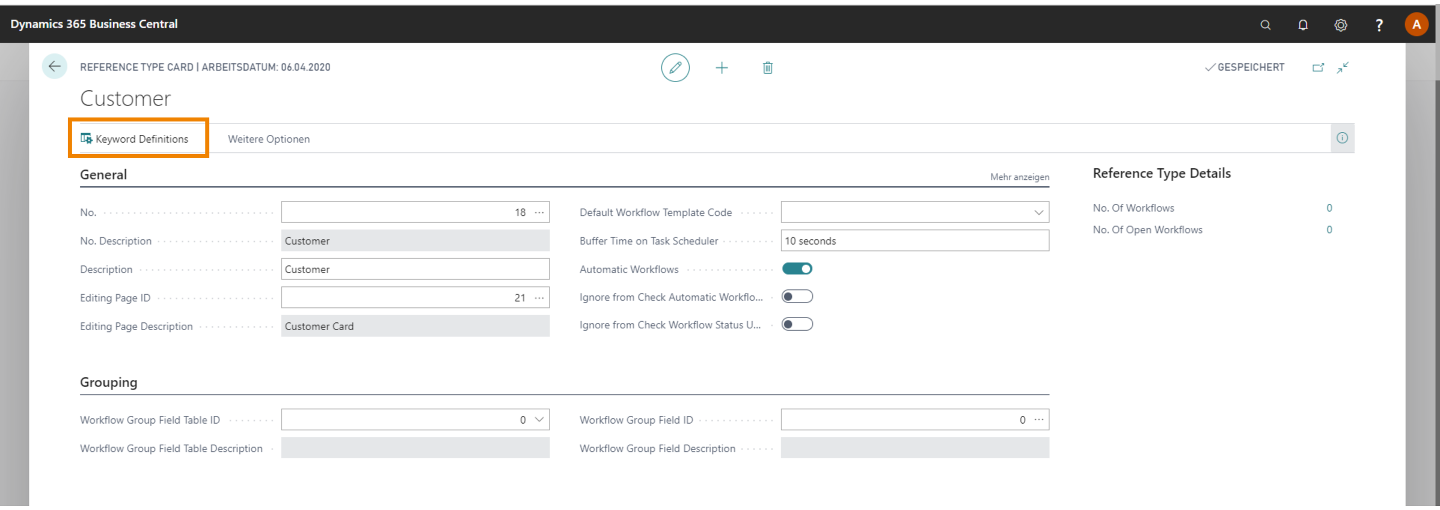
Enter Buffer Time on Task Scheduler→ 10 seconds

Activate Automatic Workflows



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

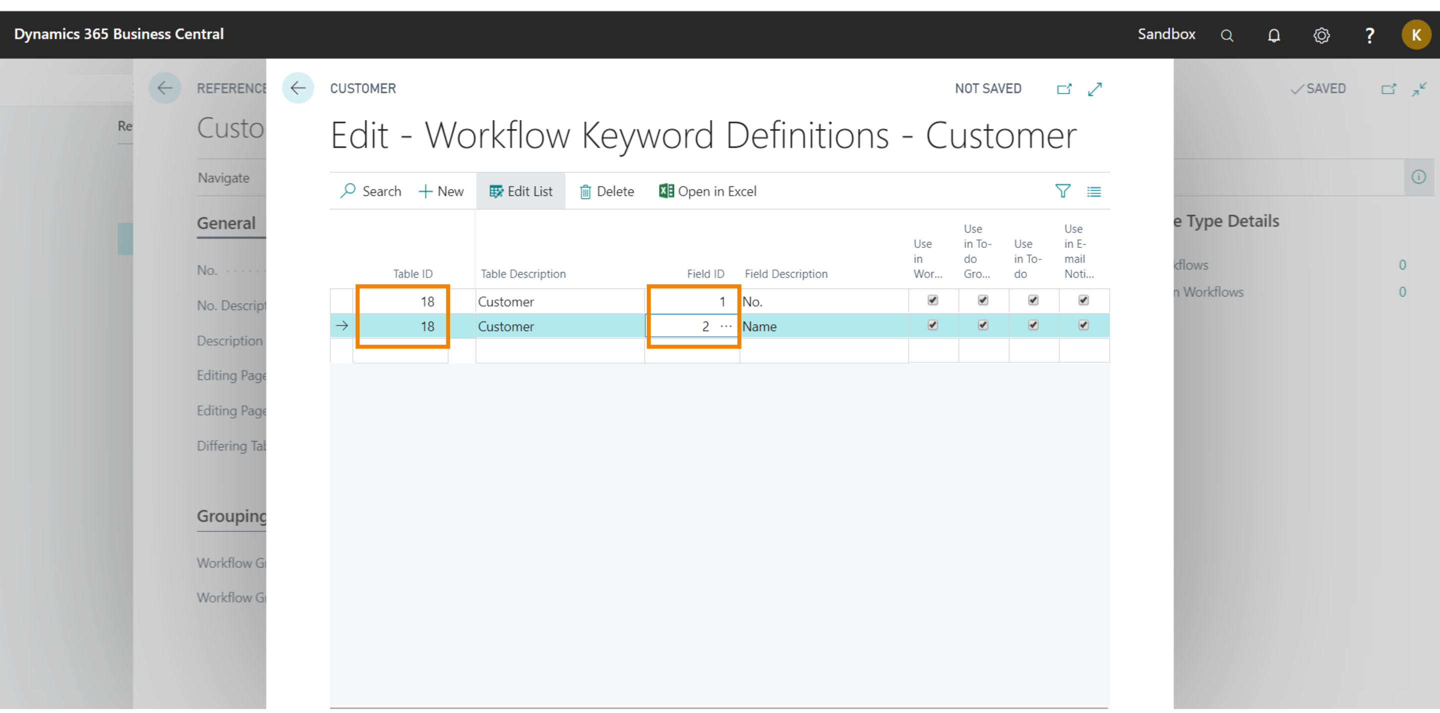
   Select Field ID → 1

   Second line

   Enter Table ID → 18

   Select Field ID → 2

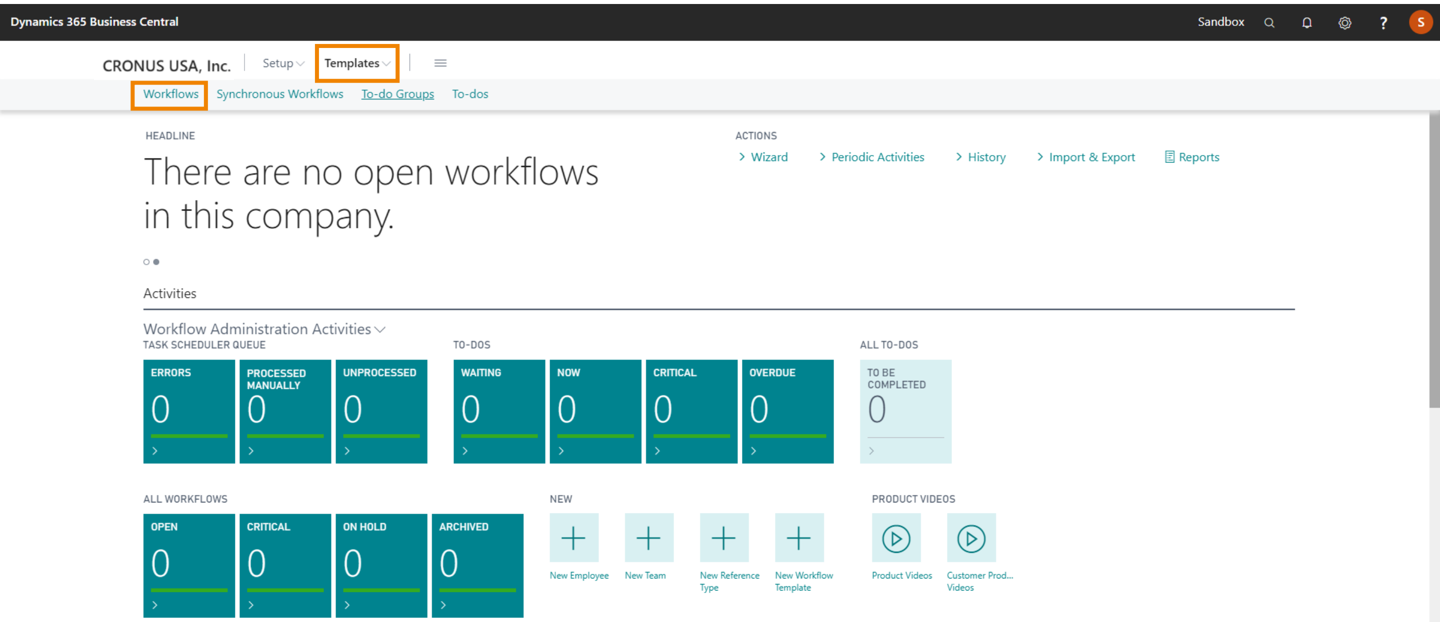
2) Close all pages and go back to the Role Center



Scenario 1
New Customer

Scenario 1: New Customer – Workflow Template

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



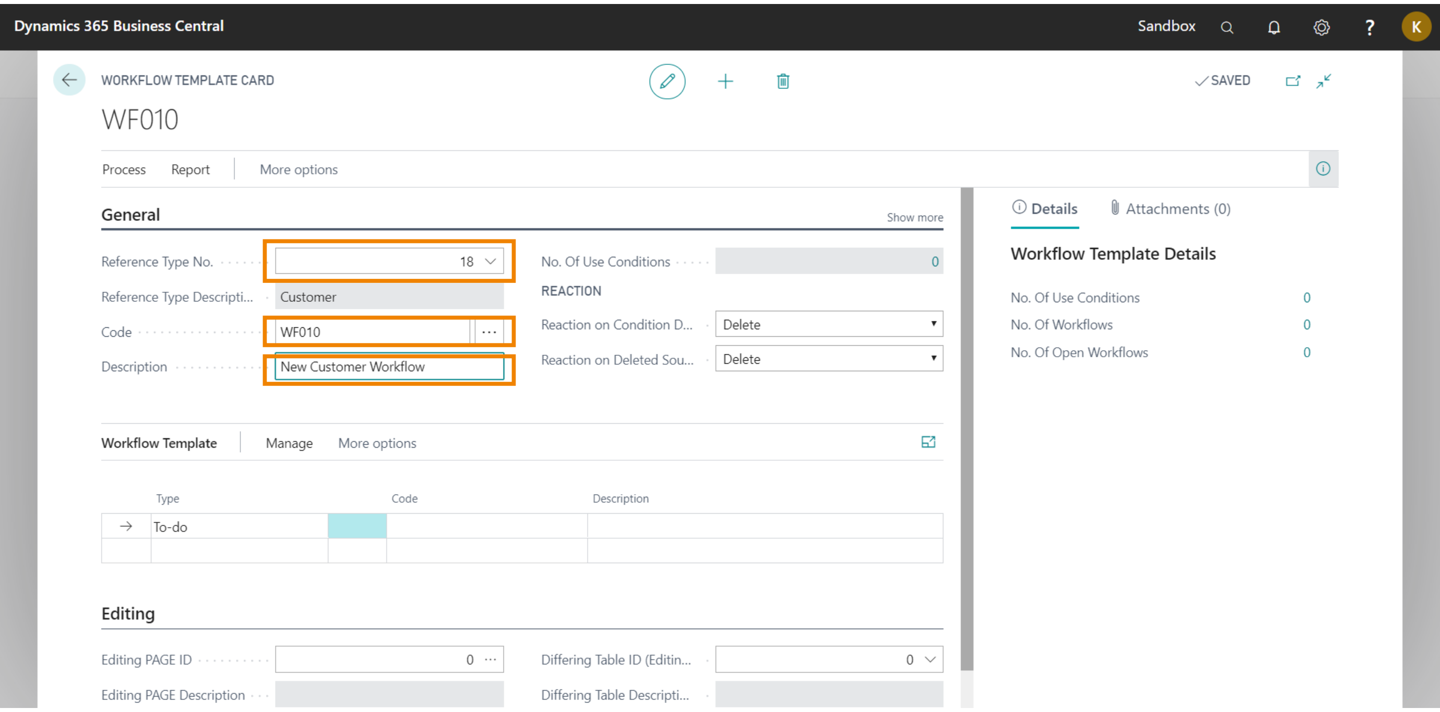
Scenario 1: New Customer – Workflow Template

1) General:

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

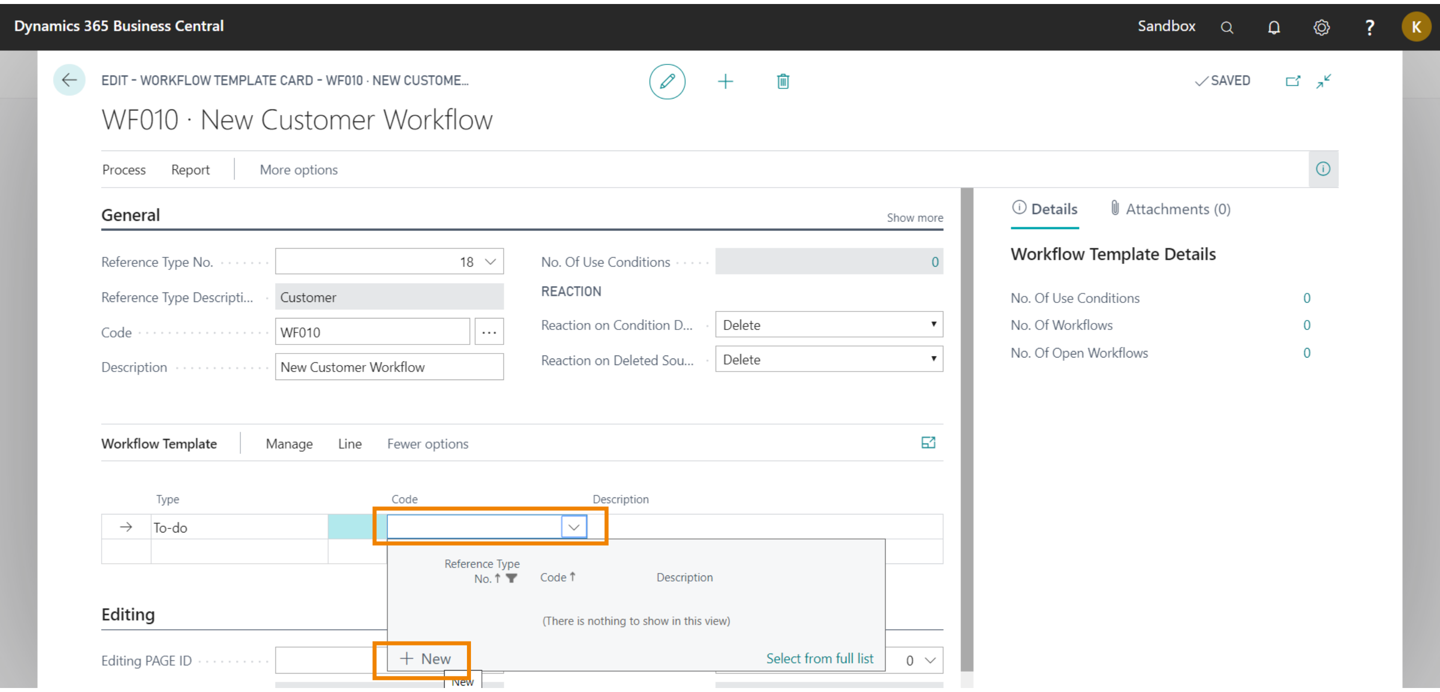
Enter Code → WF010

Enter Description → New Customer Workflow



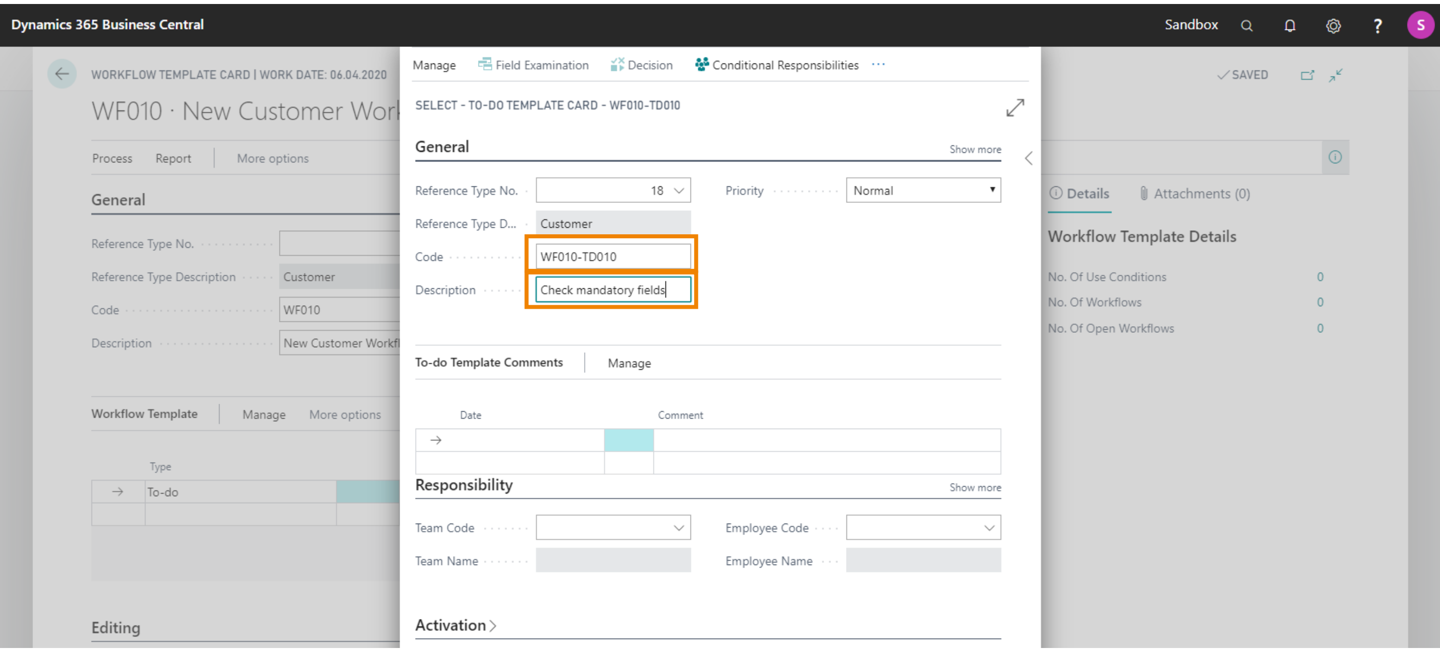
Scenario 1: New Customer – Workflow Template

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



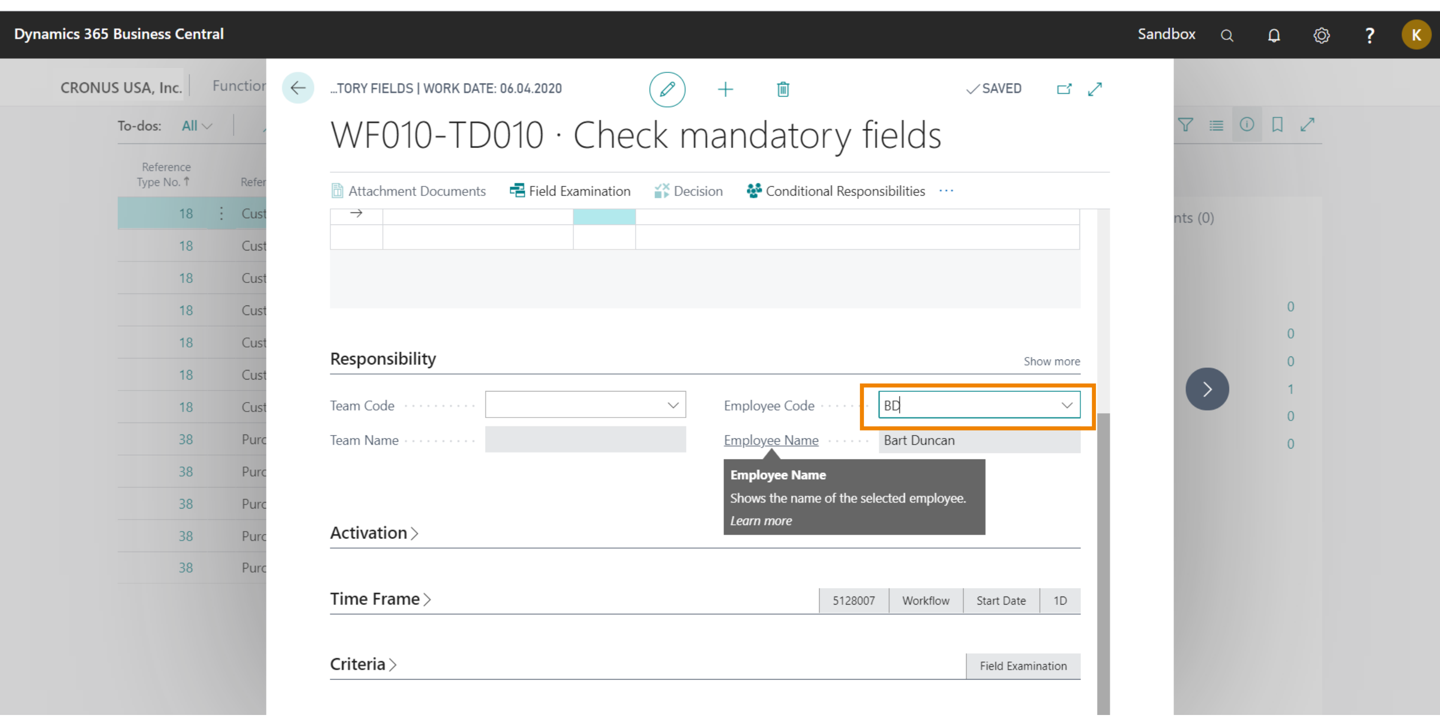
Scenario 1: New Customer – Workflow Template

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



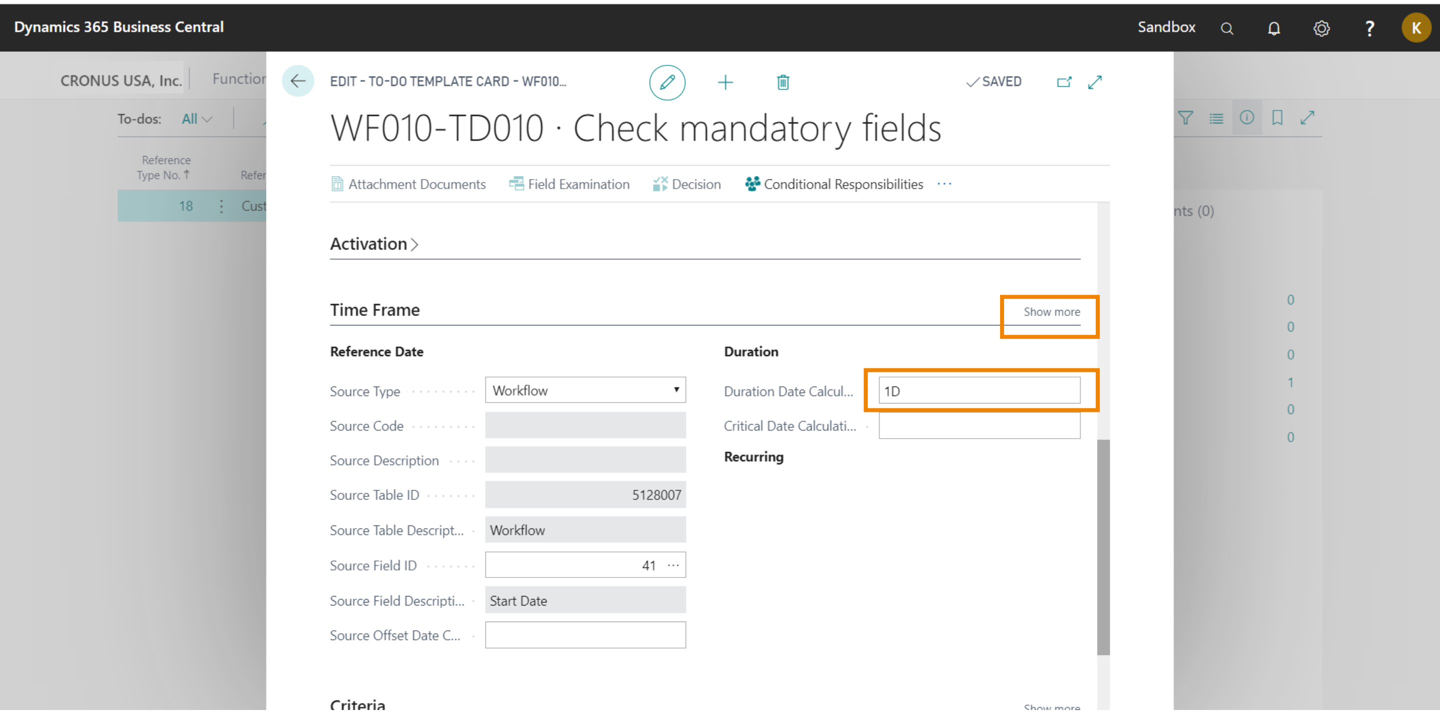
Scenario 1: New Customer – Workflow Template

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



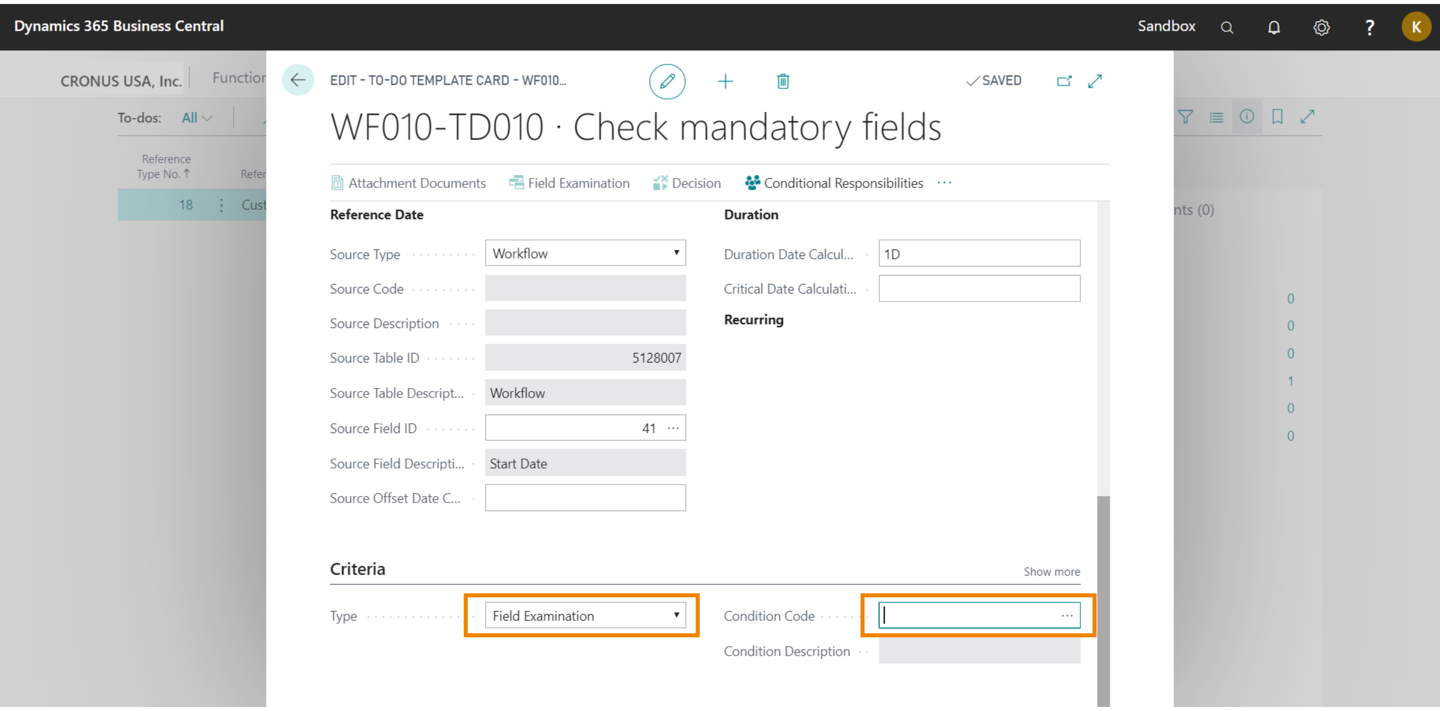
Scenario 1: New Customer – Workflow Template

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



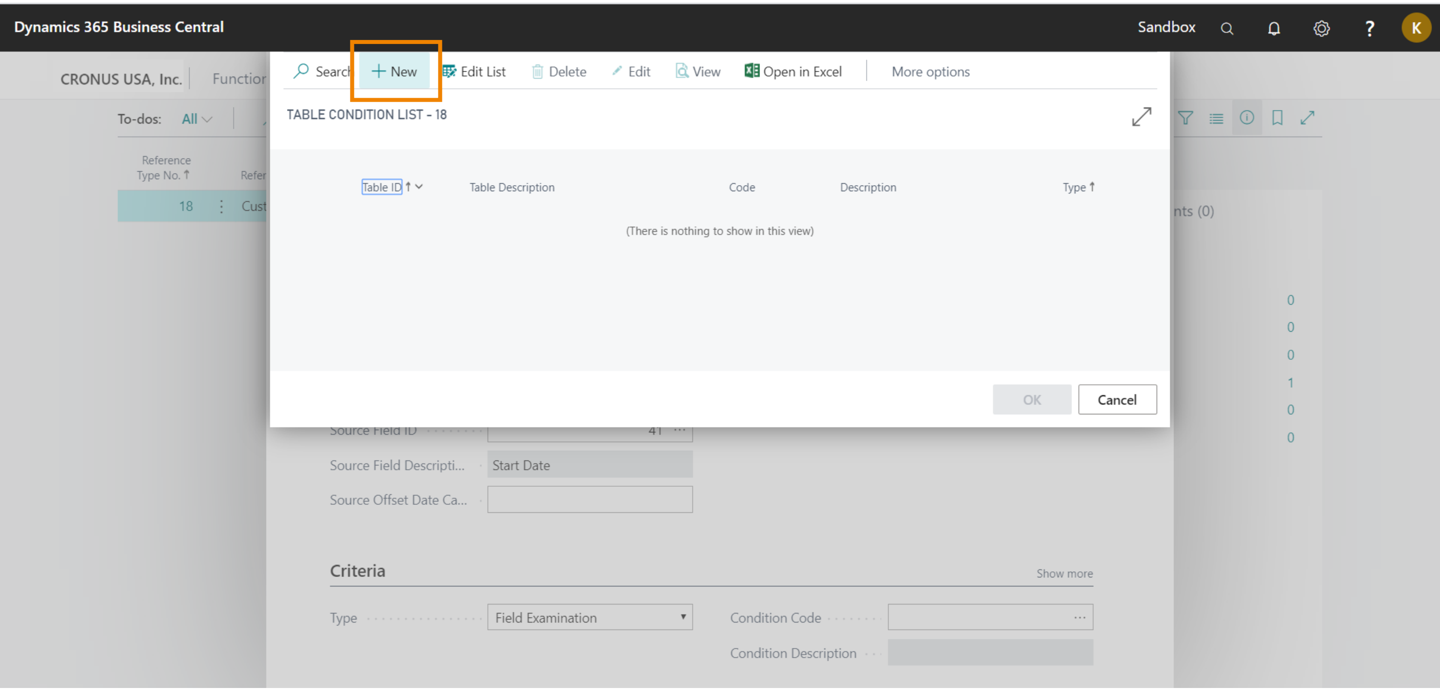
Scenario 1: New Customer – Workflow Template

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



Scenario 1: New Customer – Table Condition

1) Click on +New



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 → <>“

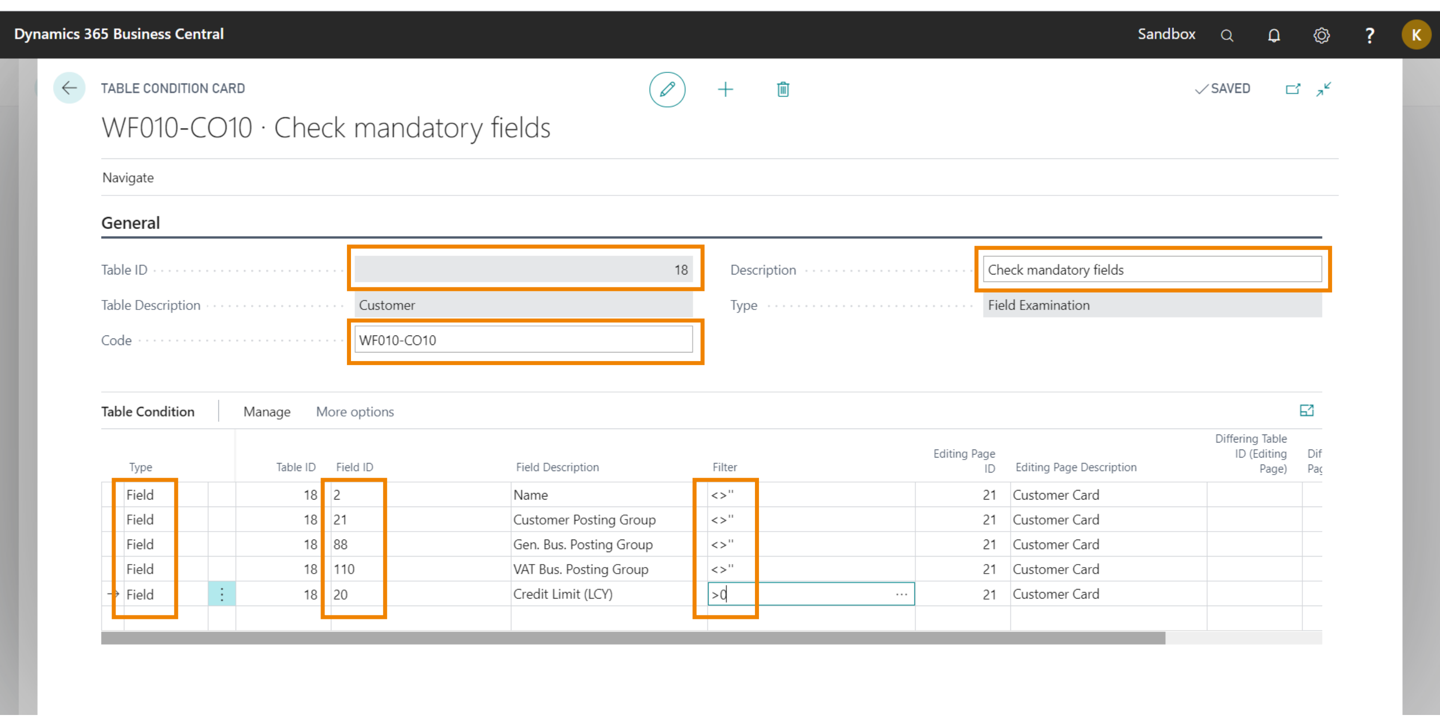
   Type → Field, Field ID → 88, Filter → <>“

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

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

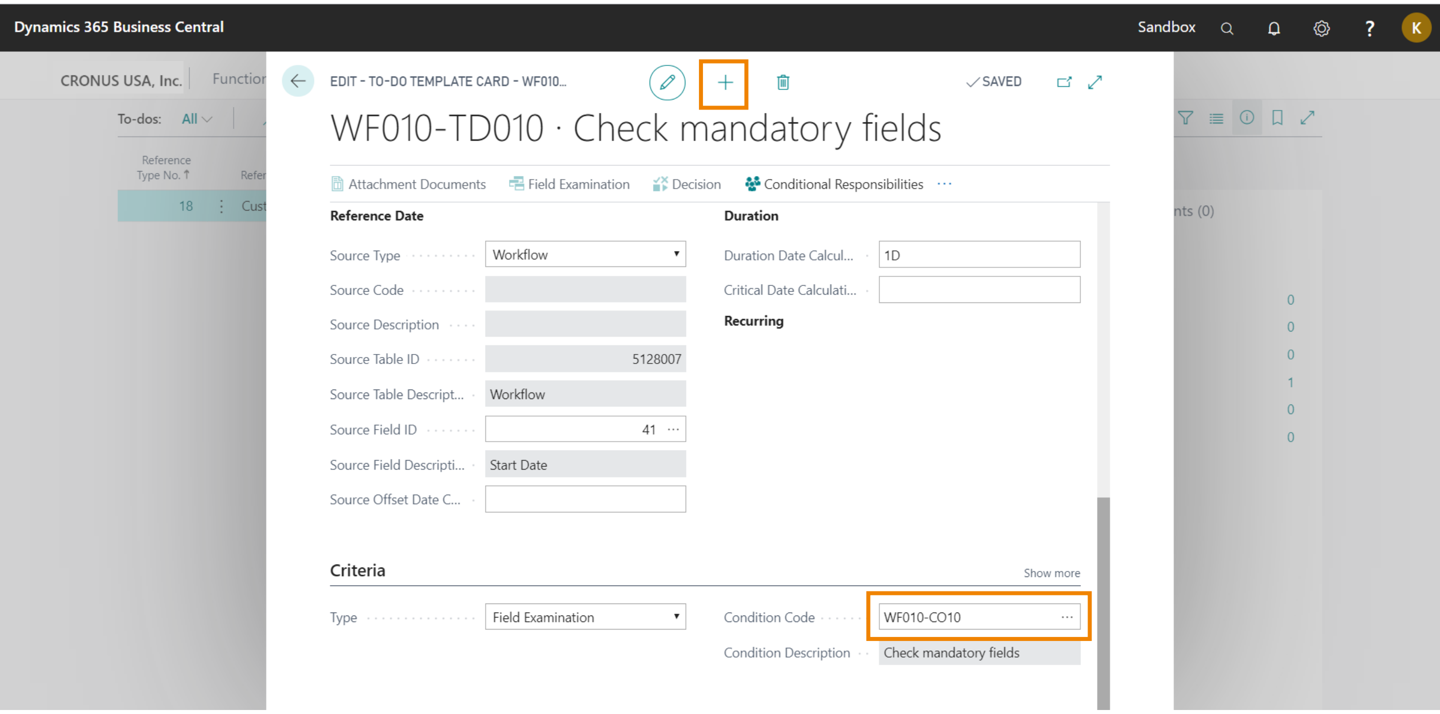
3) Close page

4) Click on Ok



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



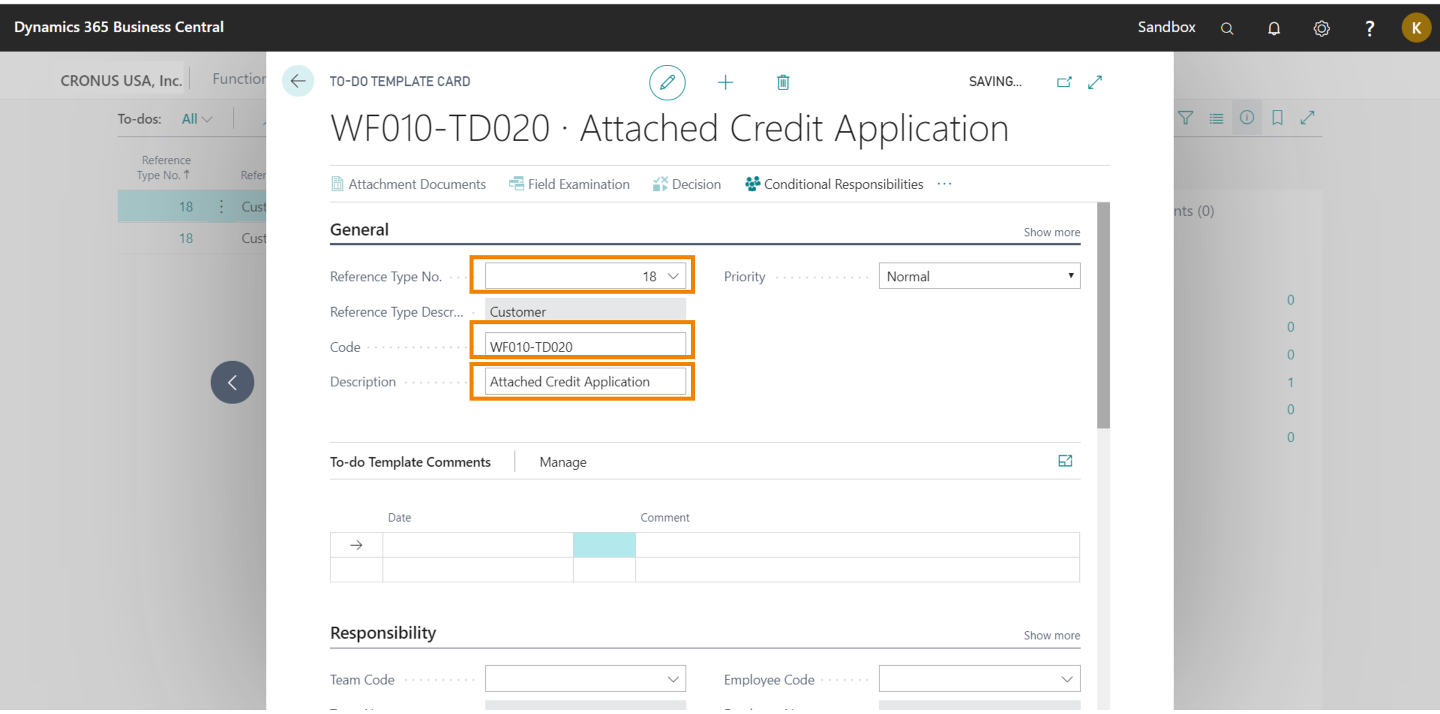
Scenario 1: New Customer – To-Do Template

1) General:

Enter Reference Type No. → 18

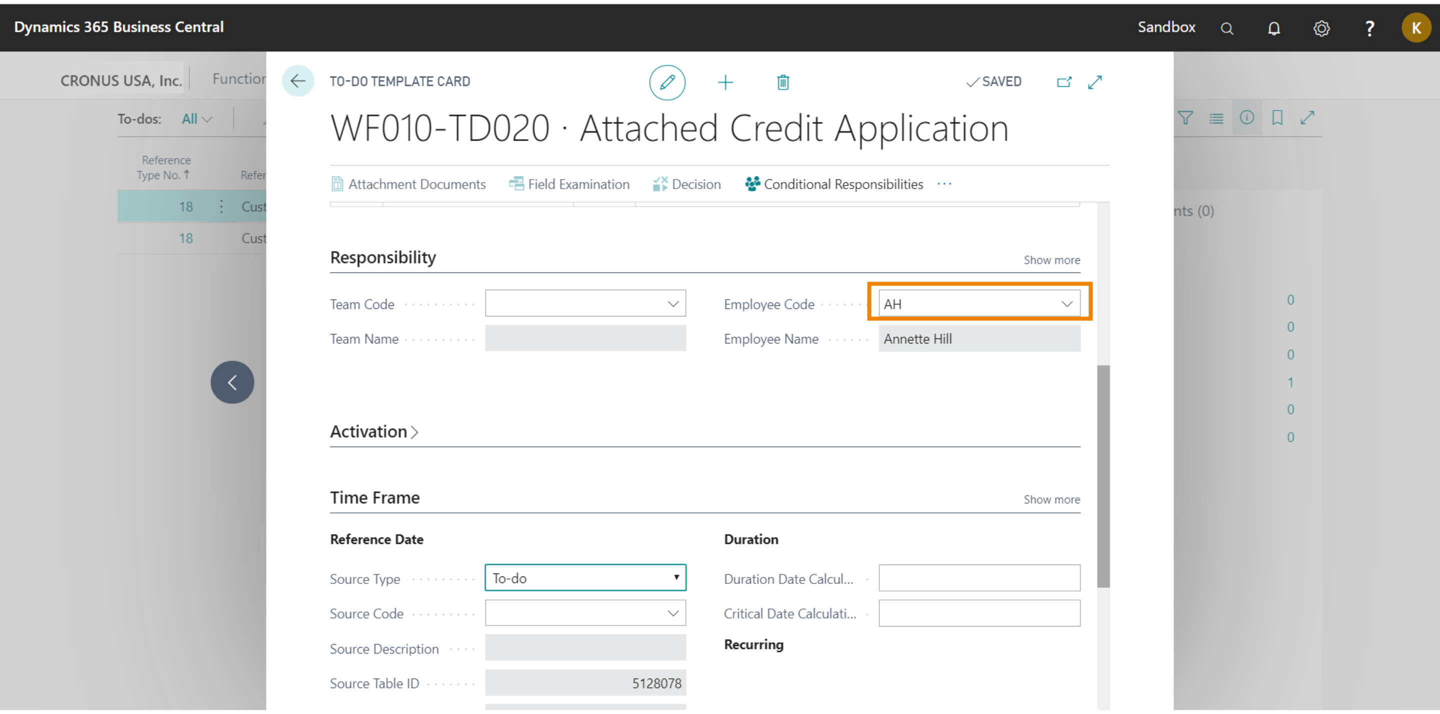
Enter Code → WF010-TD020

Enter Description → Attached Credit Application



Scenario 1: New Customer – To-Do Template

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



Scenario 1: New Customer – To-Do Template

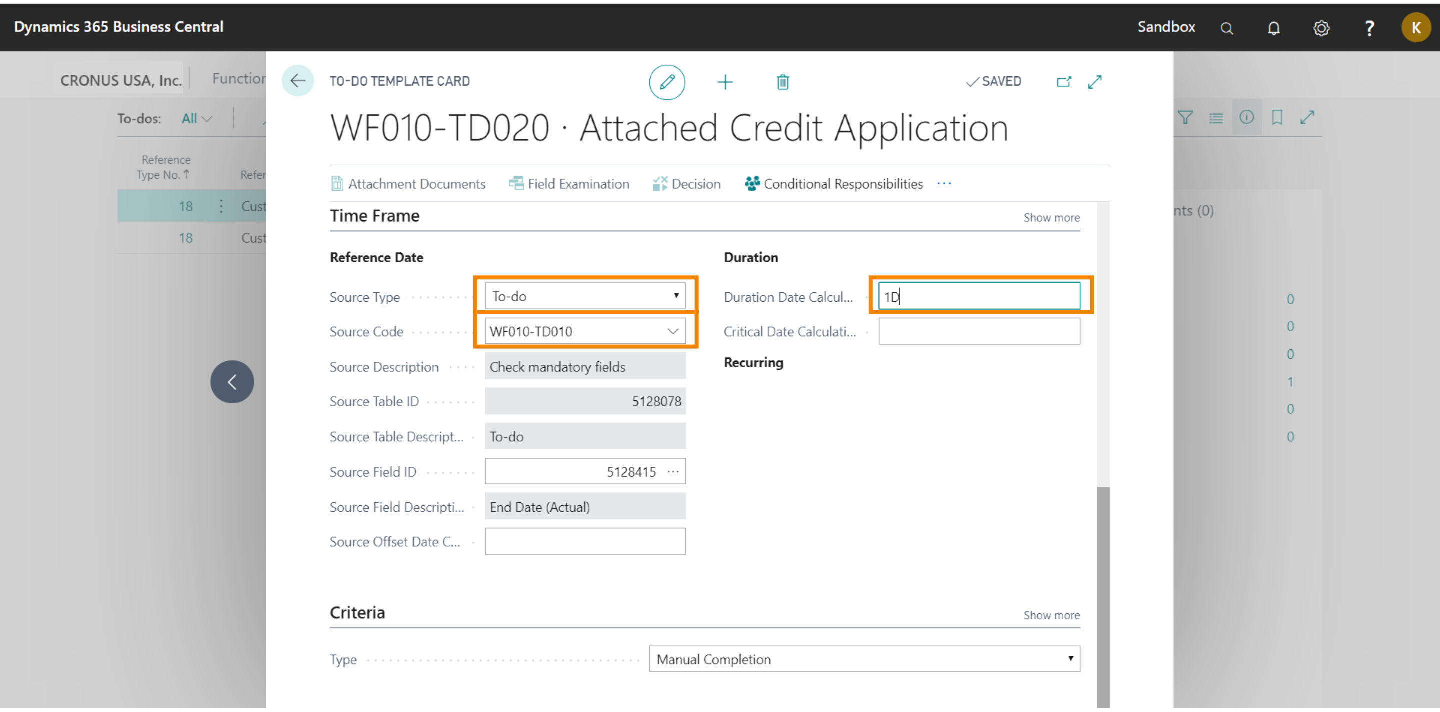
Scenario 1: New Customer – To-Do Template

1) Time Frame:

Enter Source Type → To-do

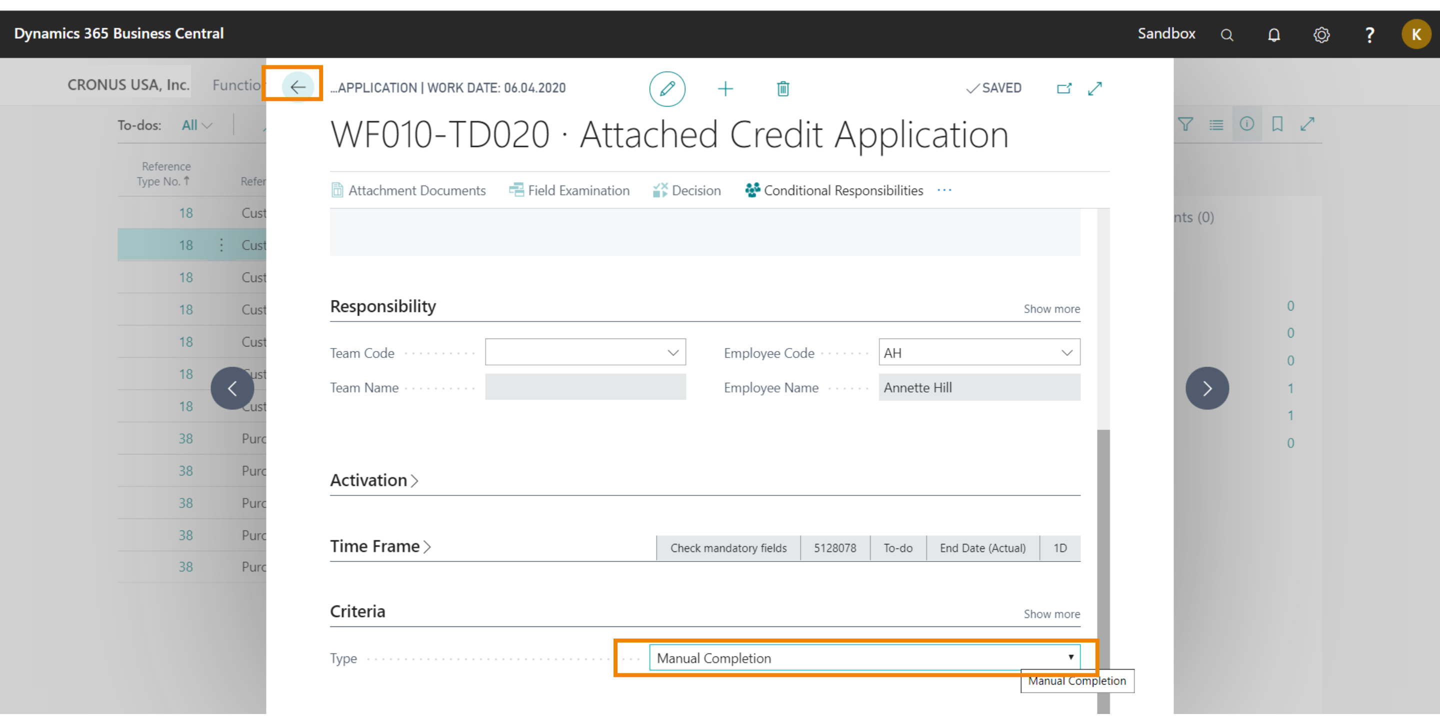
Enter Source Code → WF010-TD010

Enter Duration Date → 1D



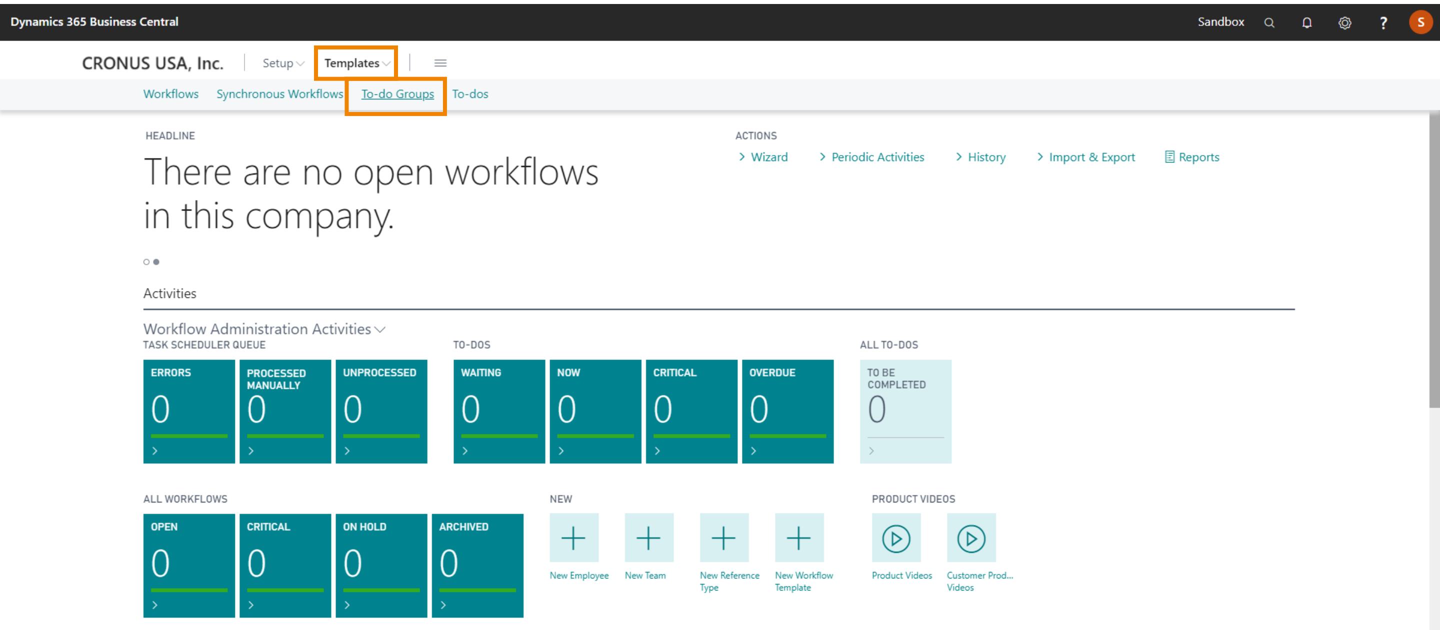
Scenario 1: New Customer – To-Do Template

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



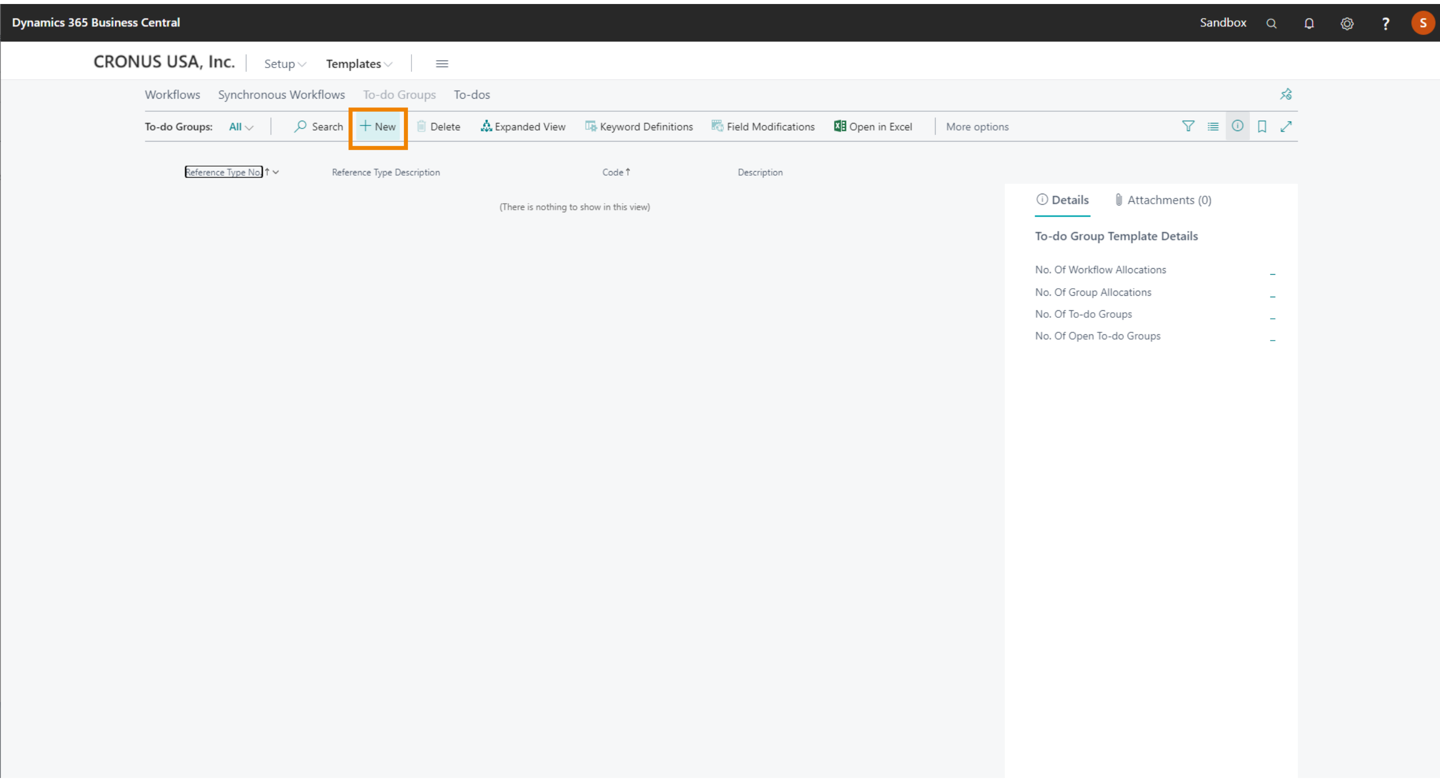
Scenario 1: New Customer – To-Do Group Template

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



Scenario 1: New Customer – To-Do Group Template

1) Click on +New



Scenario 1: New Customer – To-Do Group Template

1) **General:**

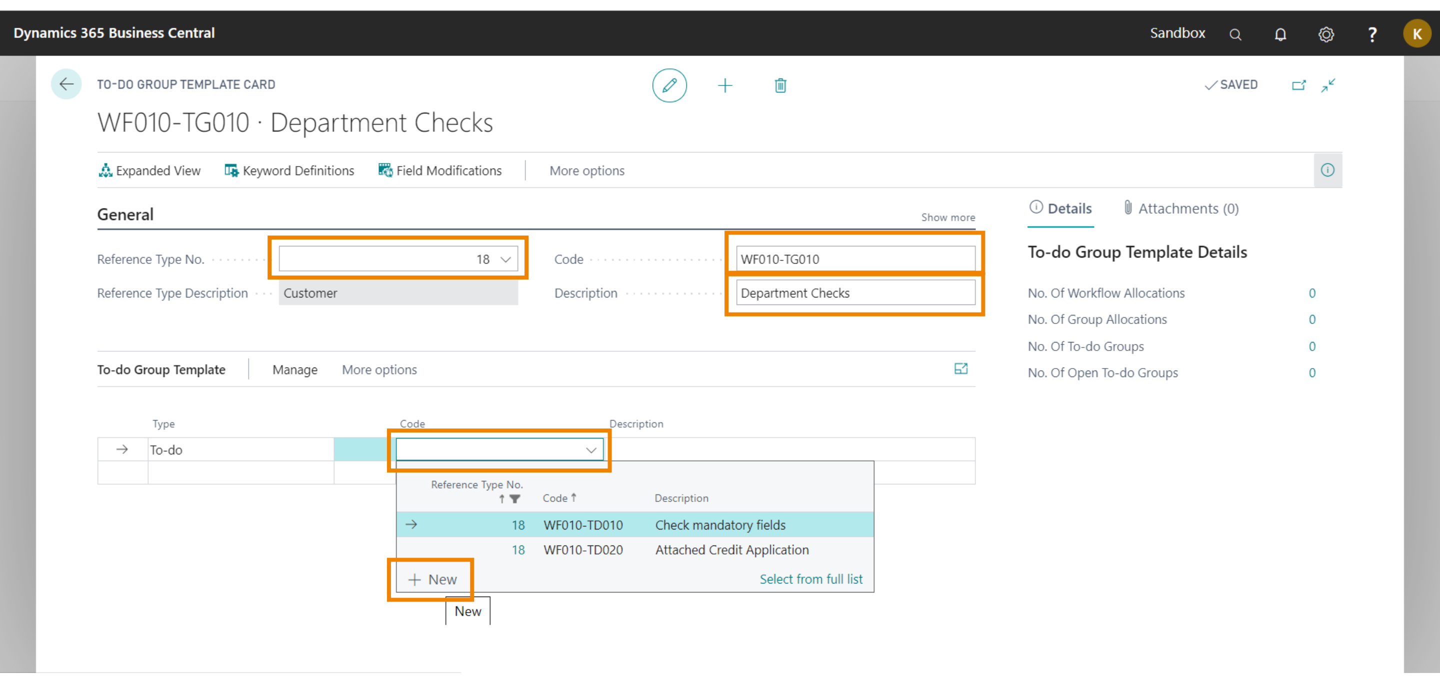
   Enter Reference Type No. → 18

   Enter Code → WF010-TG010

   Enter Description → Department Checks

2) Use look up value in field Code

3) Click on +New



Scenario 1: New Customer – To-Do Group Template

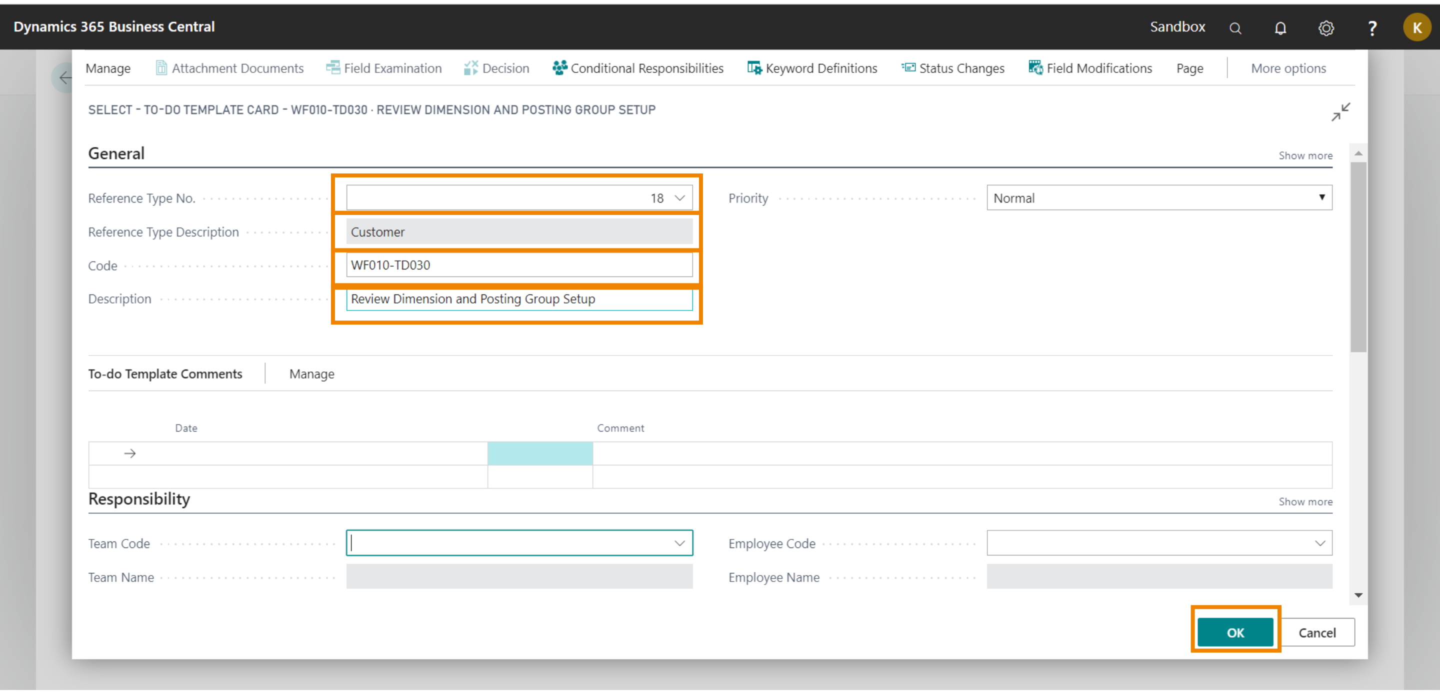
1) **General:**

Enter Reference Type No. → 18

Enter Reference Type Description → Customer

Enter Code → WF010-TD030

Enter Description → Review Dimension and Posting Group Setup

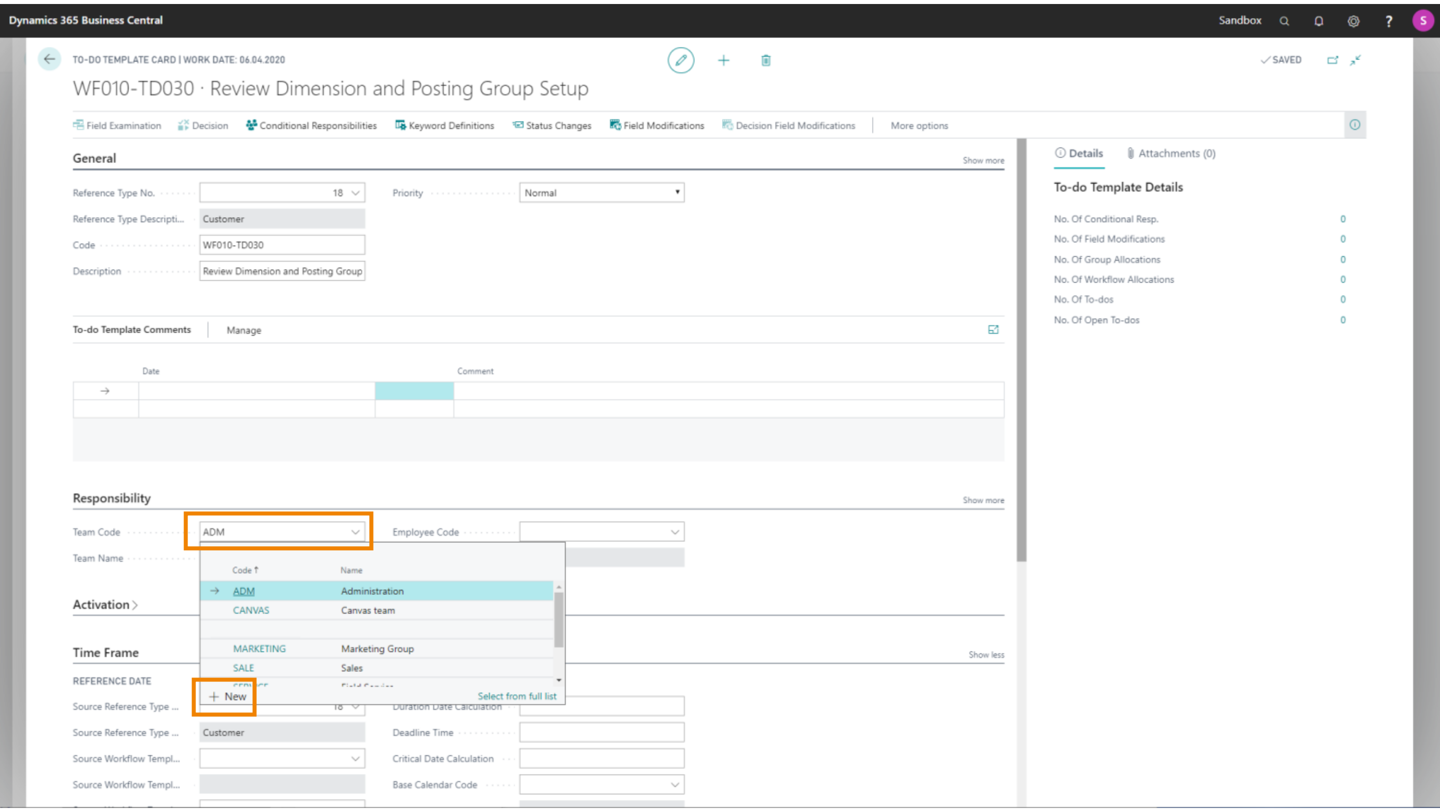


Scenario 1: New Customer – To-Do Group Template

1) Responsibility:

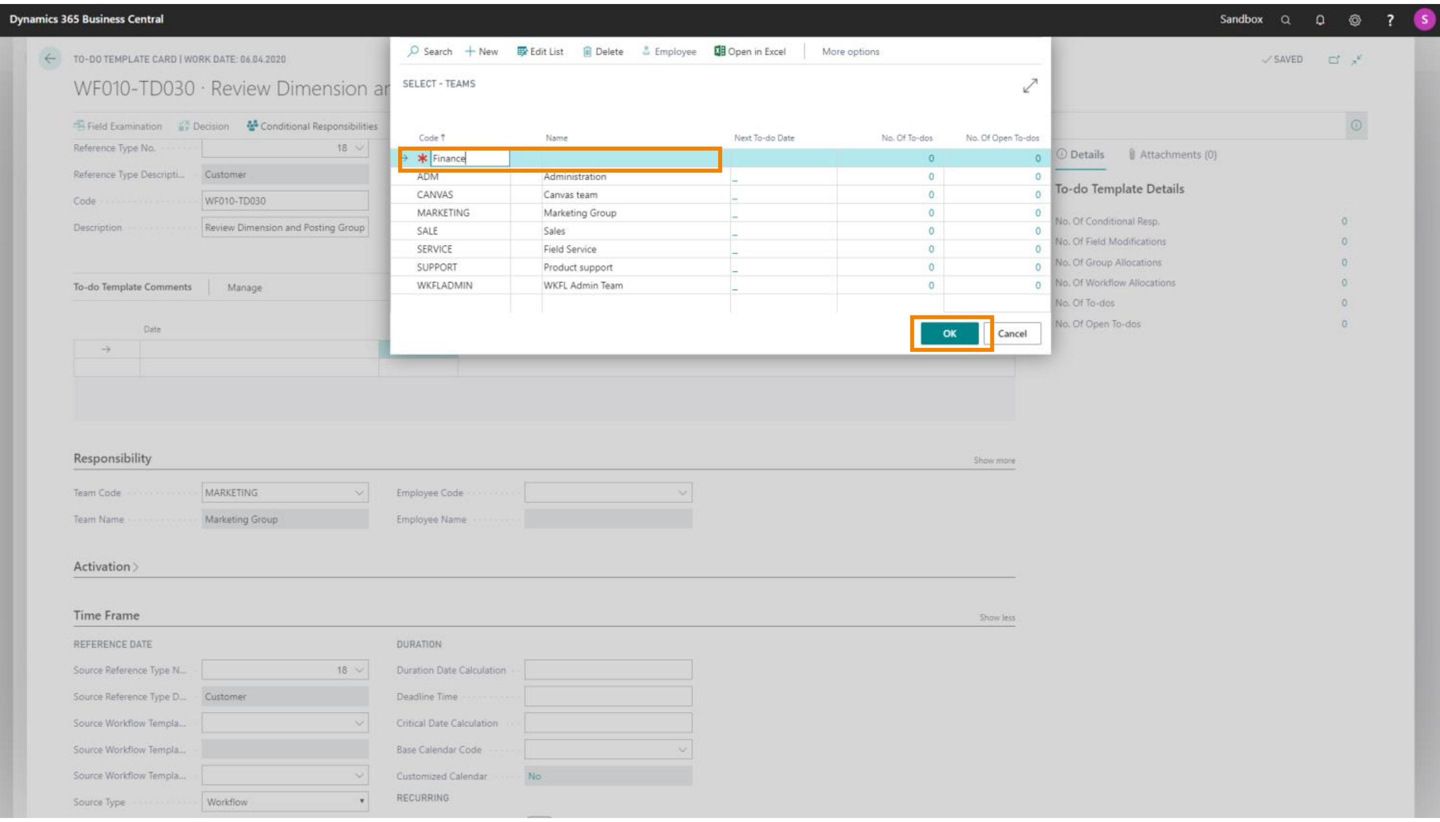
Click in field Team Code

Click on +New



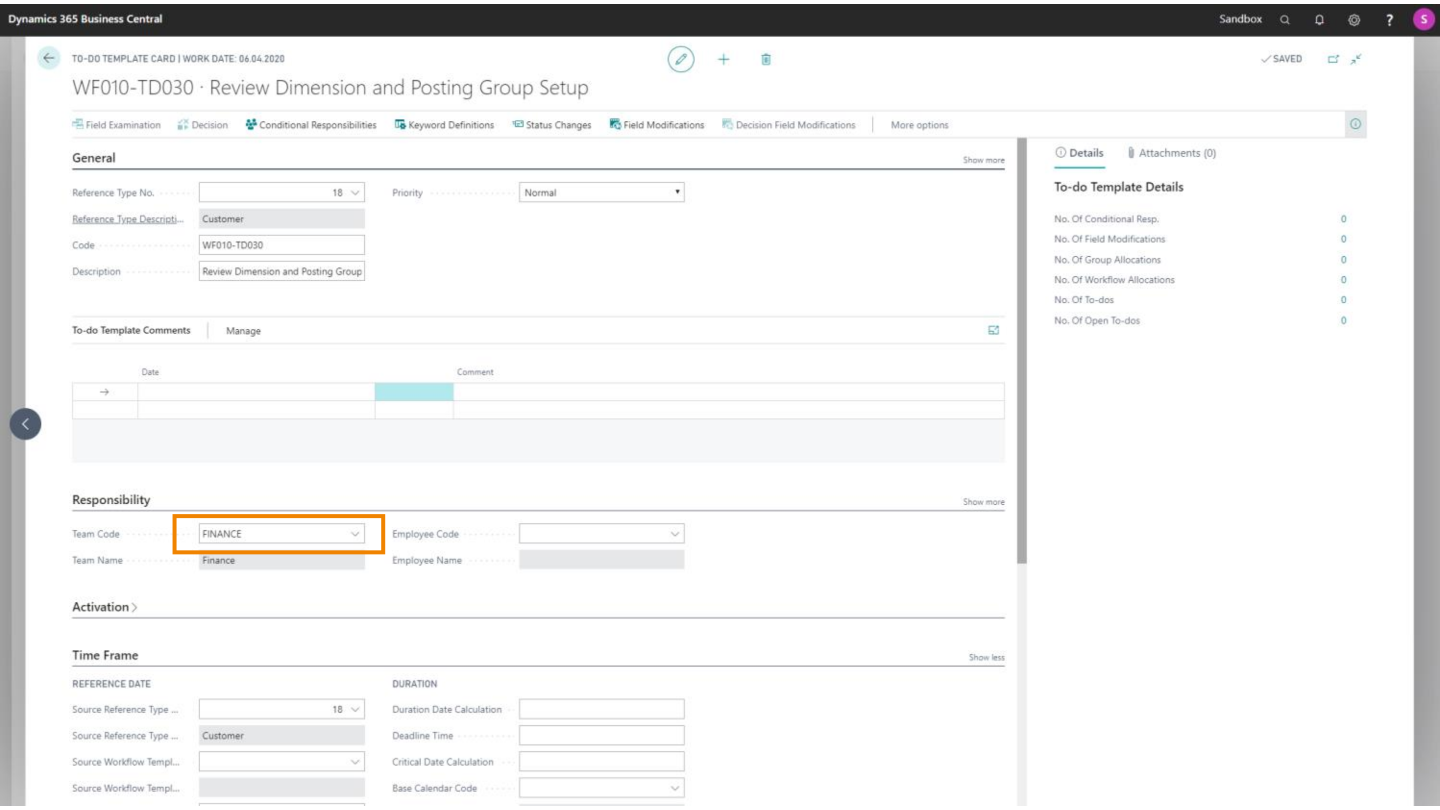
Scenario 1: New Customer – To-Do Group Template

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



Scenario 1: New Customer – To-Do Group Template

1) **Responsibility:** Finance Team is entered



Scenario 1: New Customer – To-Do Group Template

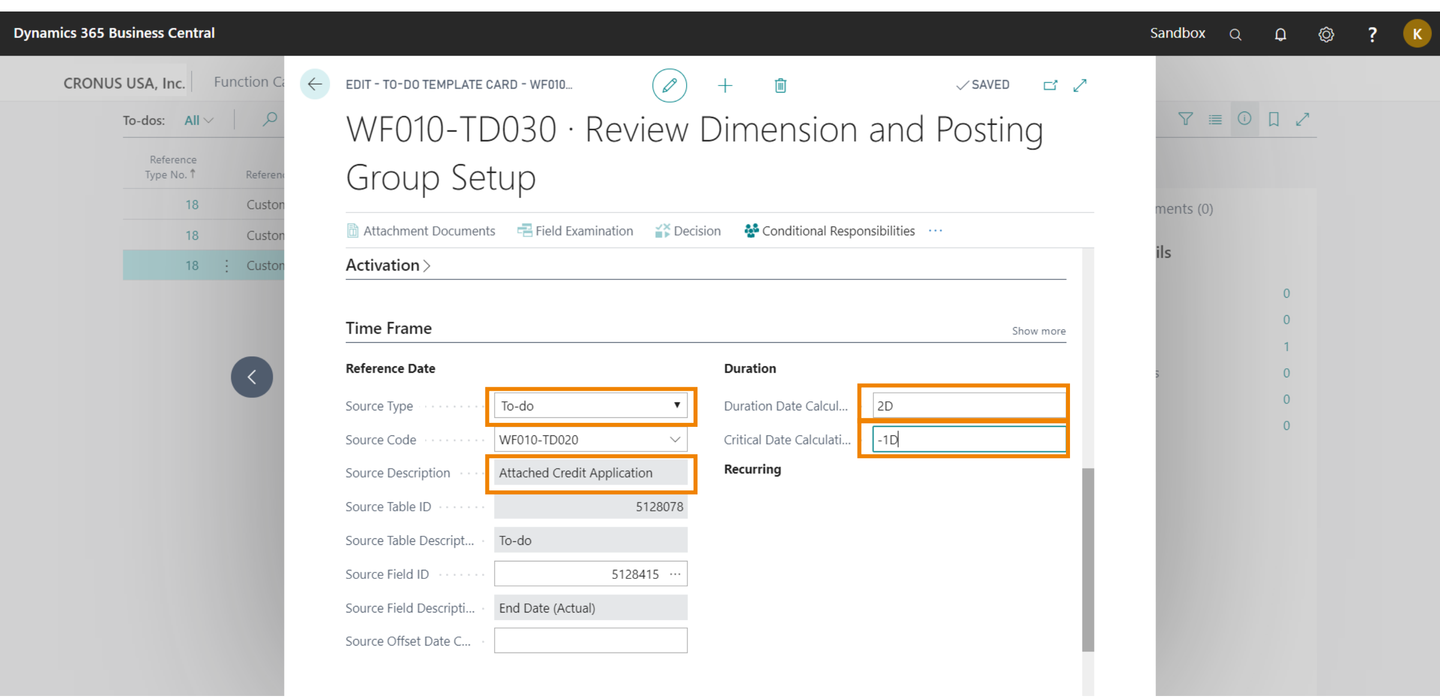
1) **Time Frame:**

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

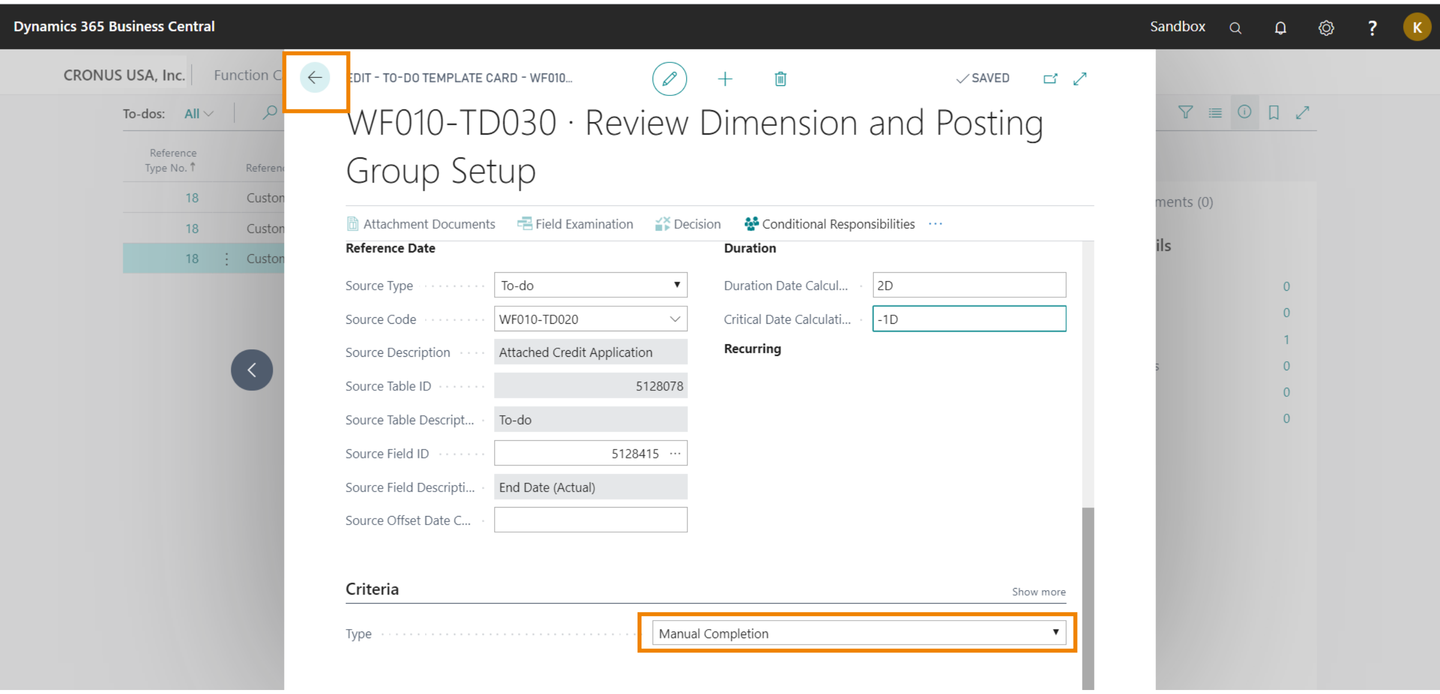


Scenario 1: New Customer – To-Do Group Template

1) Criteria:

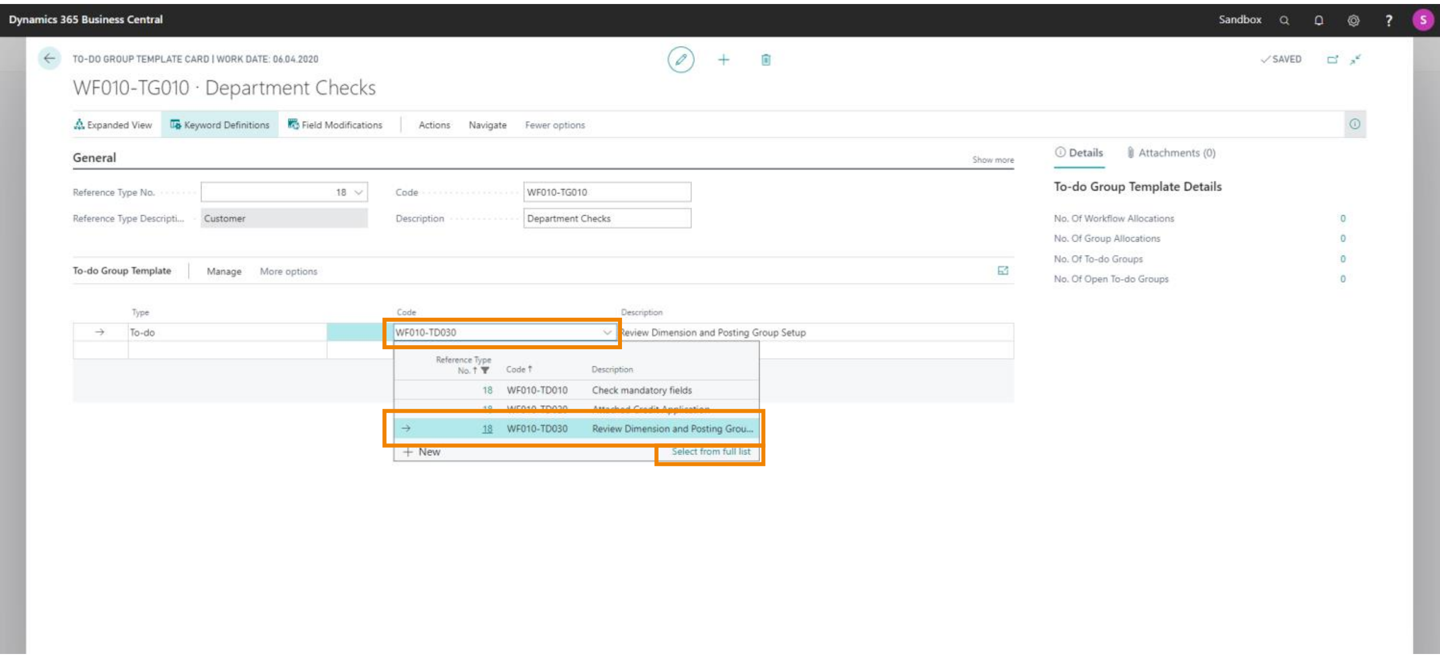
Enter Type → Manual Completion

2) Close this page



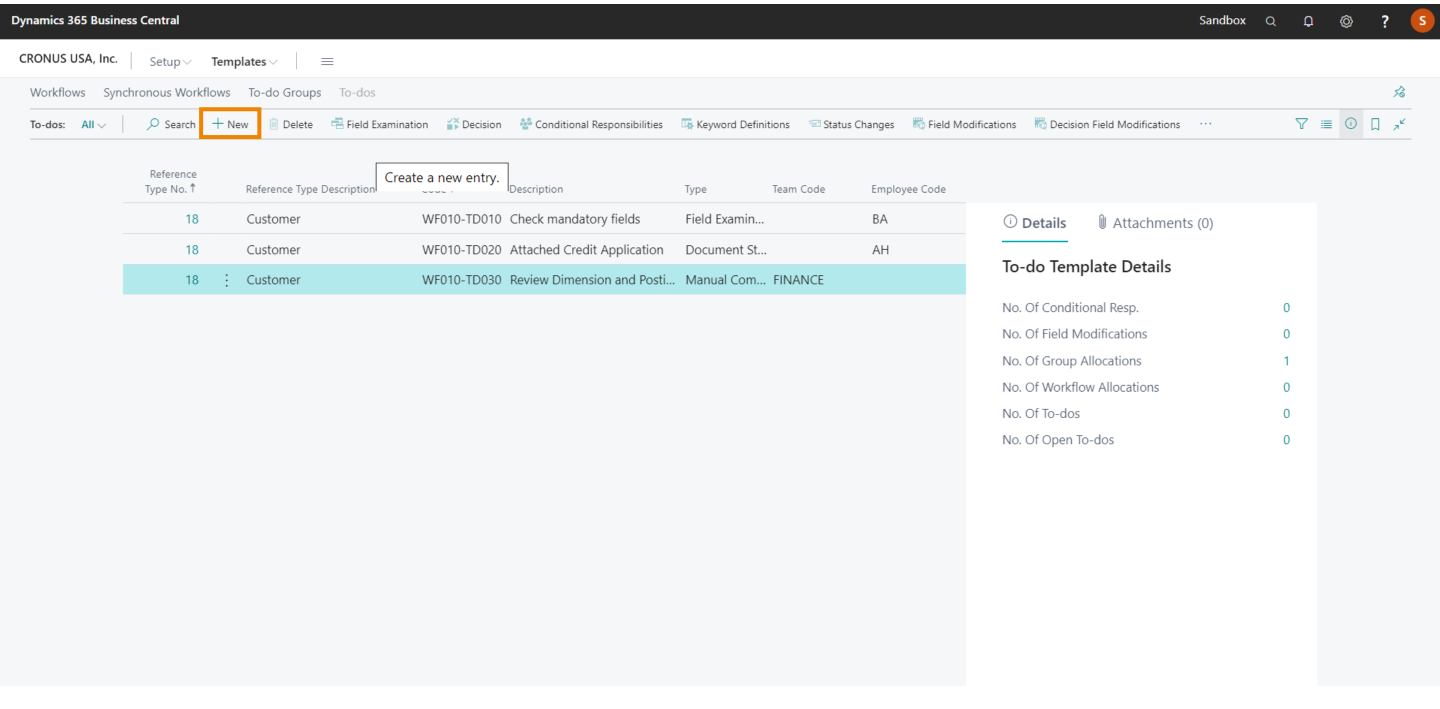
Scenario 1: New Customer – To-Do Group Template

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



Scenario 1: New Customer – To-Do Group Template

1) Click on +New



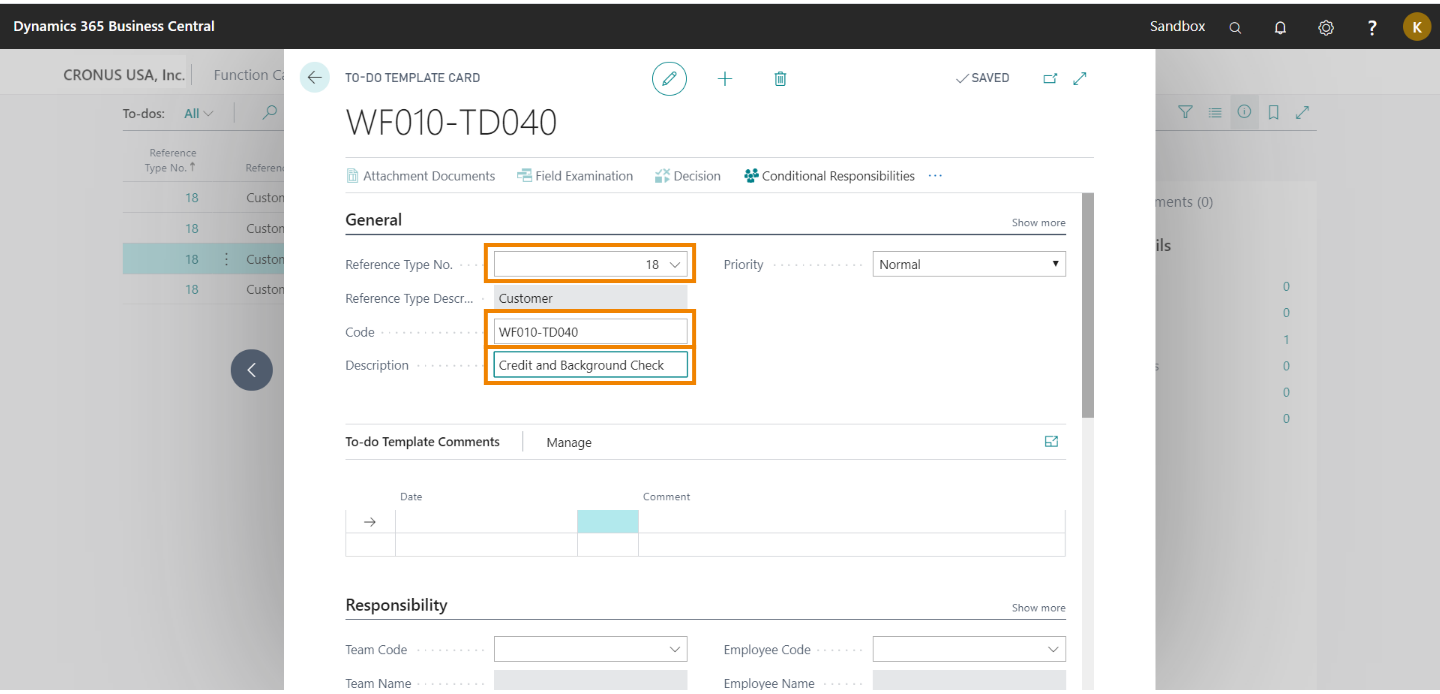
Scenario 1: New Customer – To-Do Group Template

1) **General:**

Enter Reference Type No. → 18

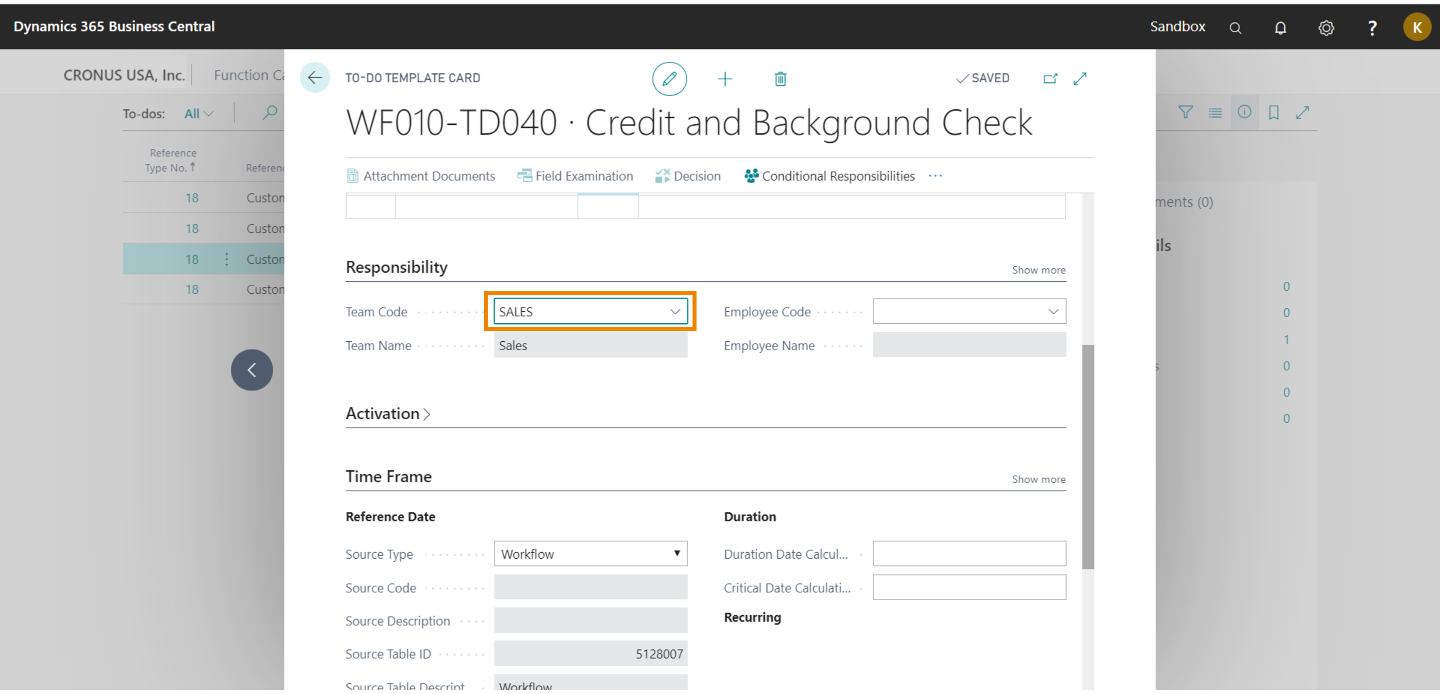
Enter Code → WF010-TD040

Enter Description → Credit and Background Check



Scenario 1: New Customer – To-Do Group Template

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



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

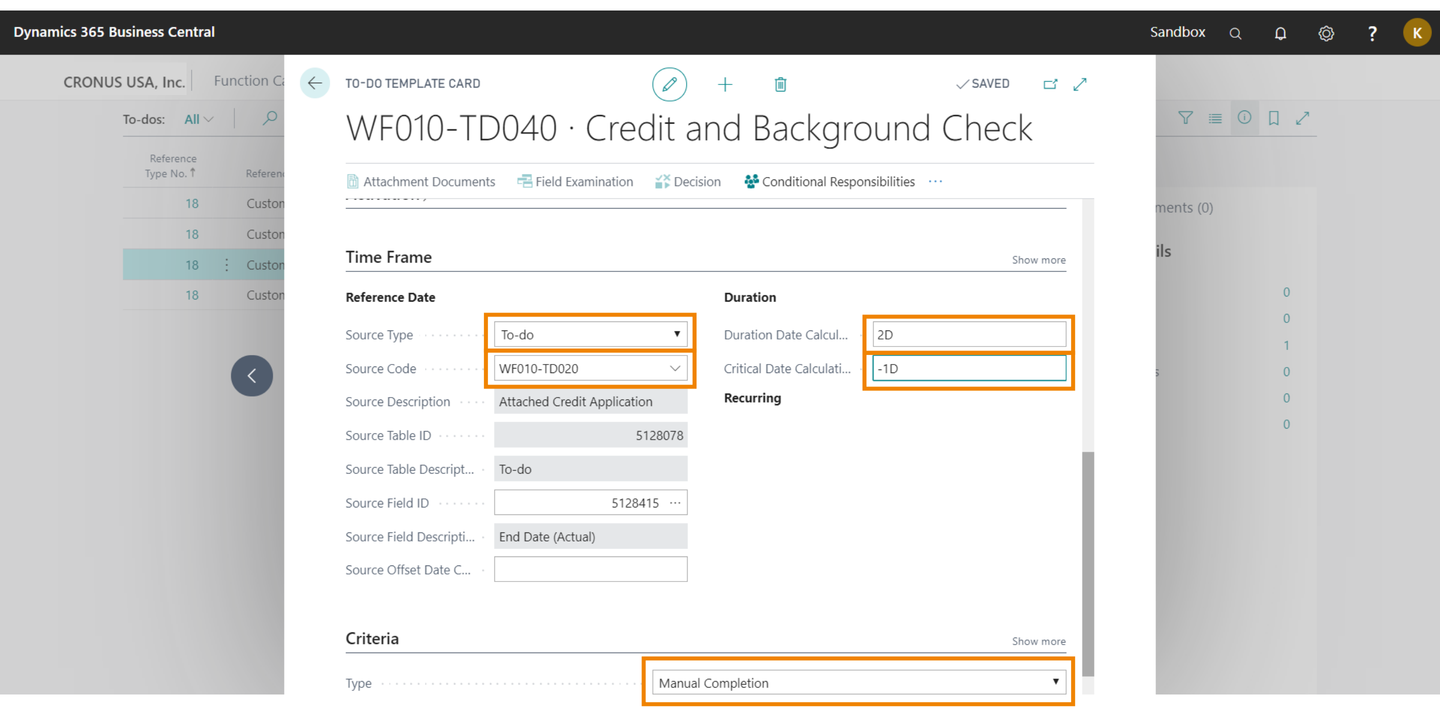
   Enter Duration Date Calculation → 2D

   Enter Critical Date Calculation → -1D

2) **Criteria:**

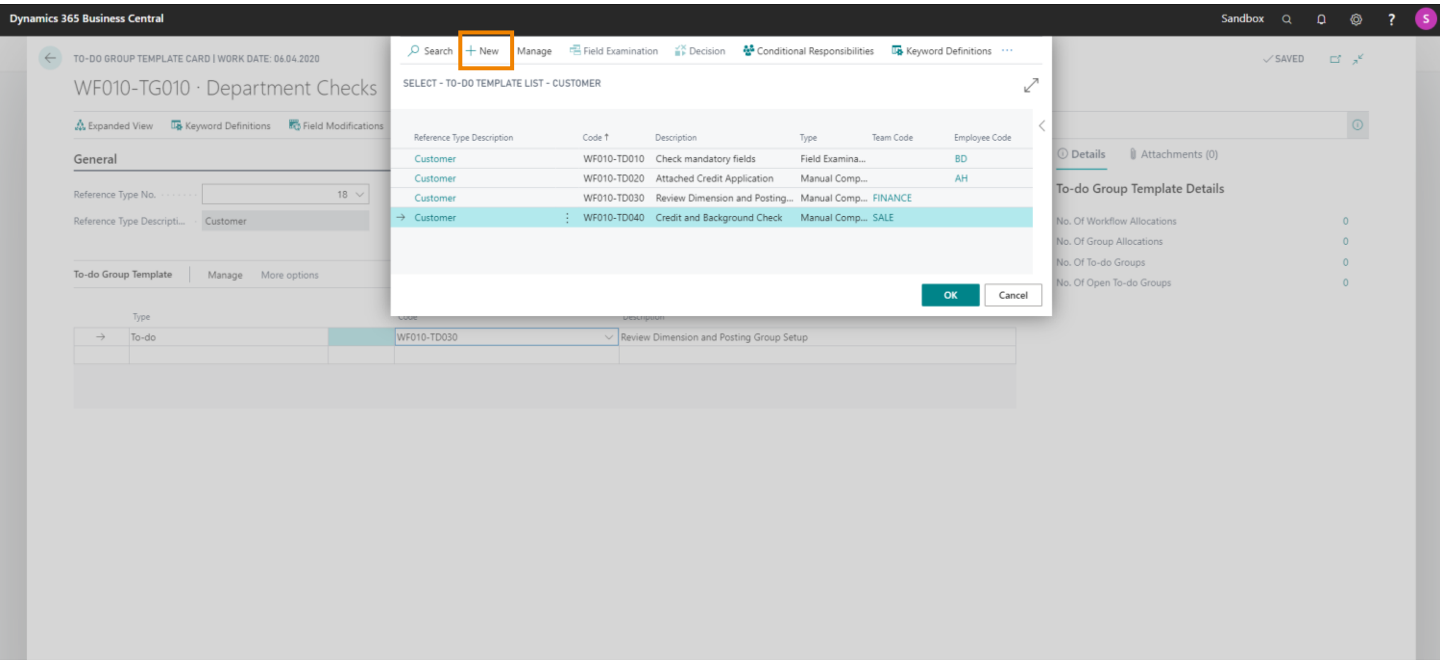
   Use look up value in field Type and select Manual Completion

3) Close Page



Scenario 1: New Customer – To-Do Group Template

1) Click on +New



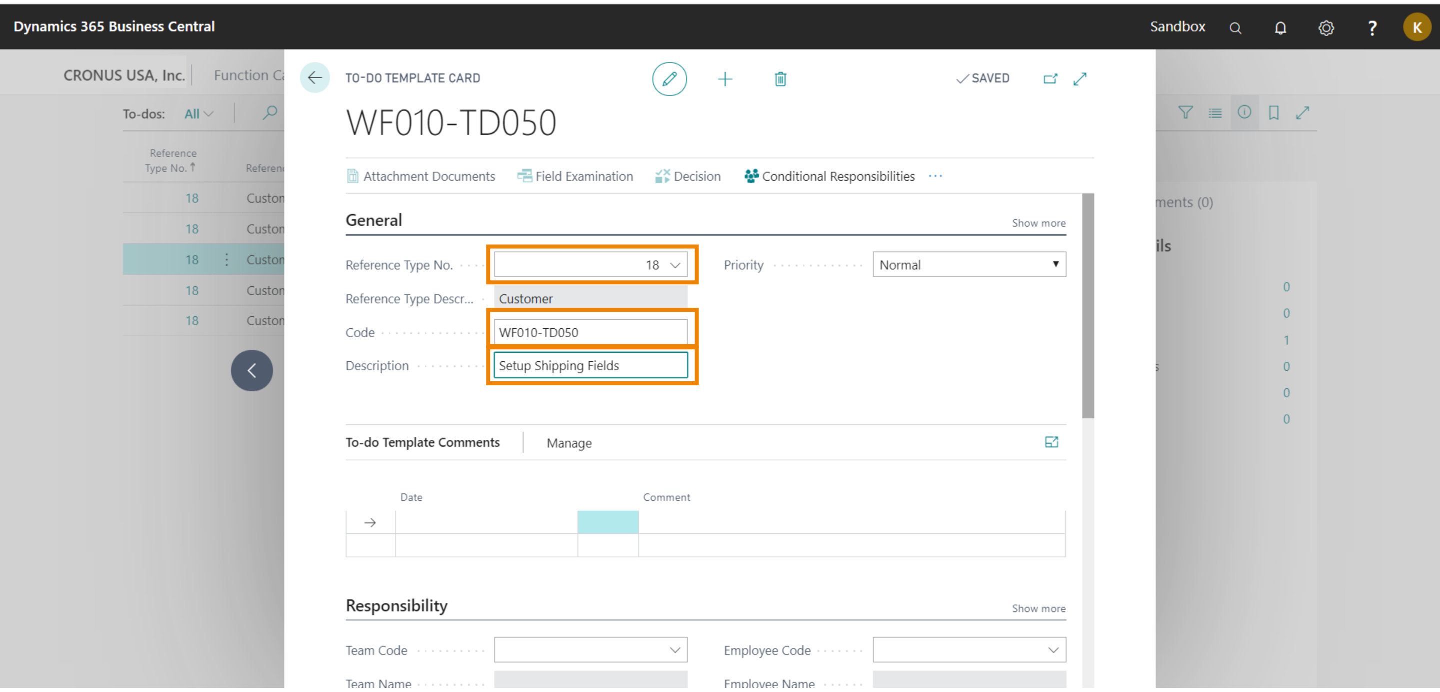
Scenario 1: New Customer – To-Do Group Template

1) General:

Enter Reference Type No. → 18

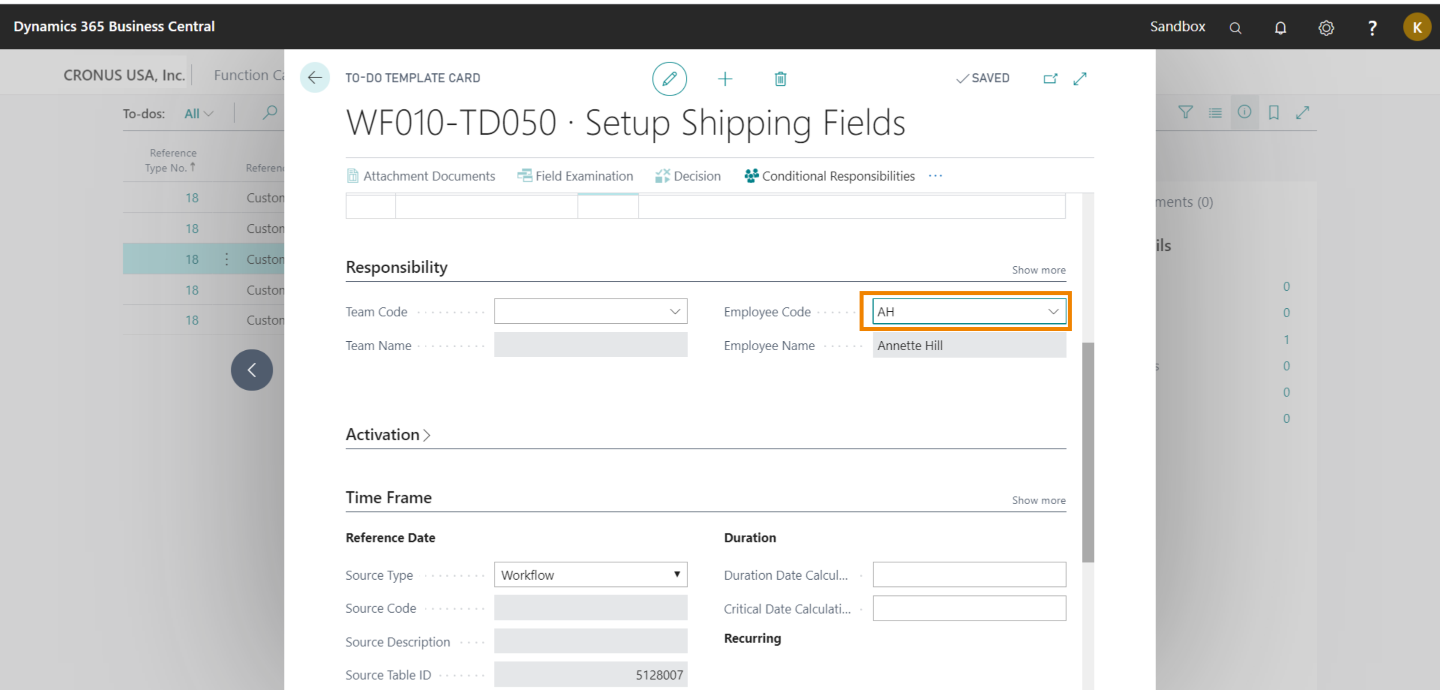
Enter Code → WF010-TD050

Enter Description → Setup Shipping Fields



Scenario 1: New Customer – To-Do Group Template

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



Scenario 1: New Customer – To-Do Group Template

1) **Time Frame:**

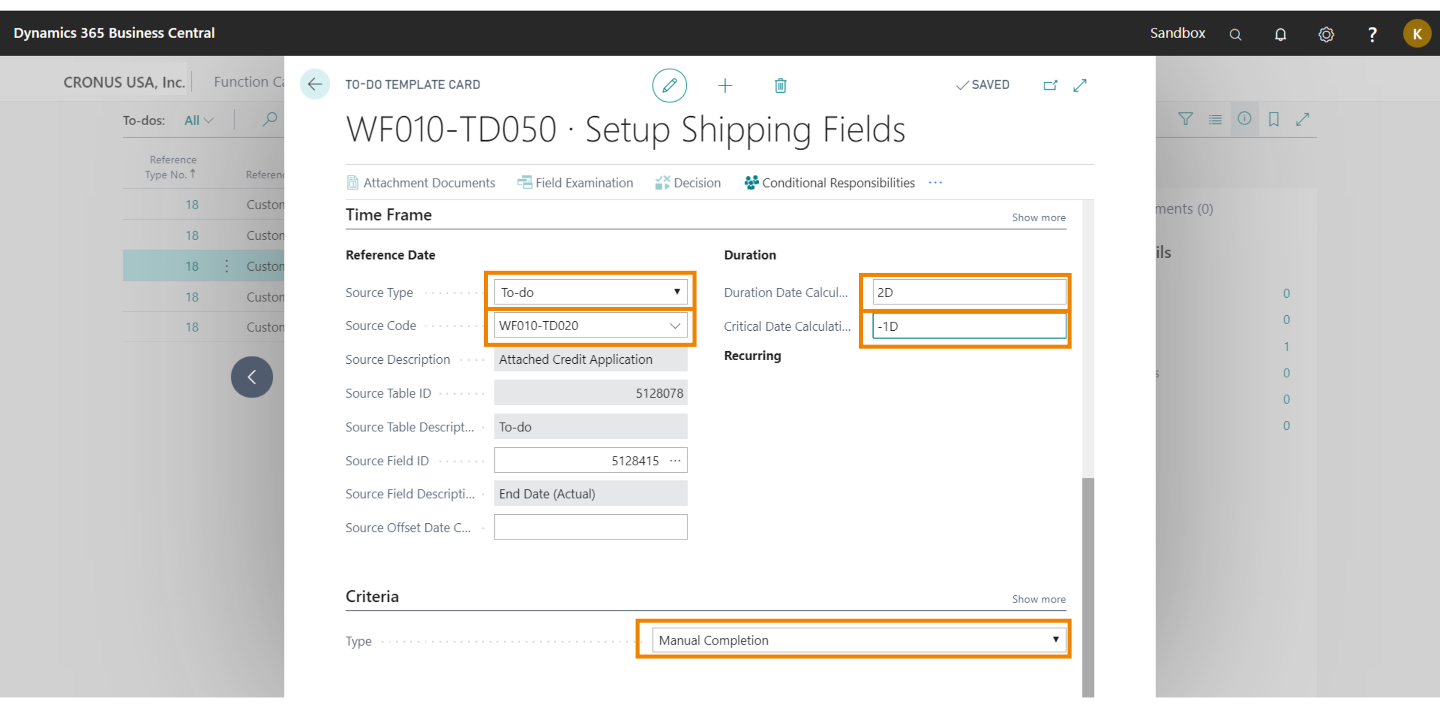
   Use look up Source Type → To-do

   Enter Source Code → WF010-TD020

   Enter Duration Date Calculation → 2D

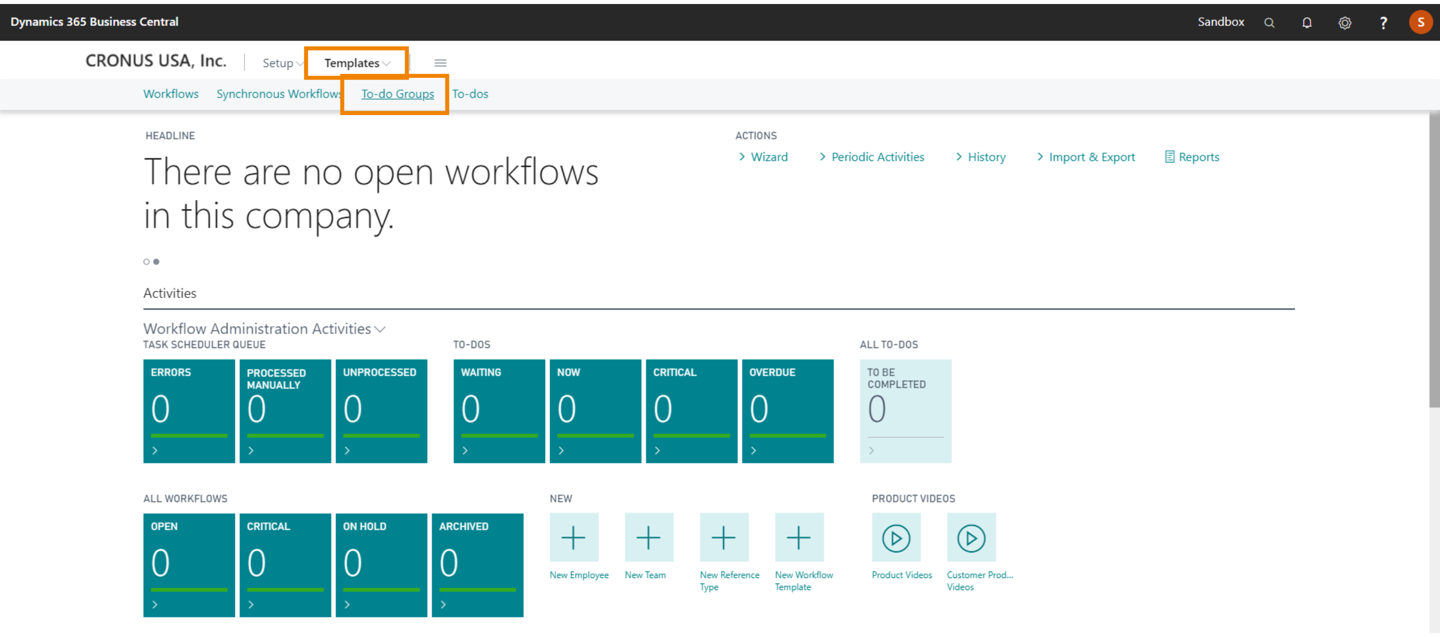
   Enter Critical Date Calculation → -1D

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



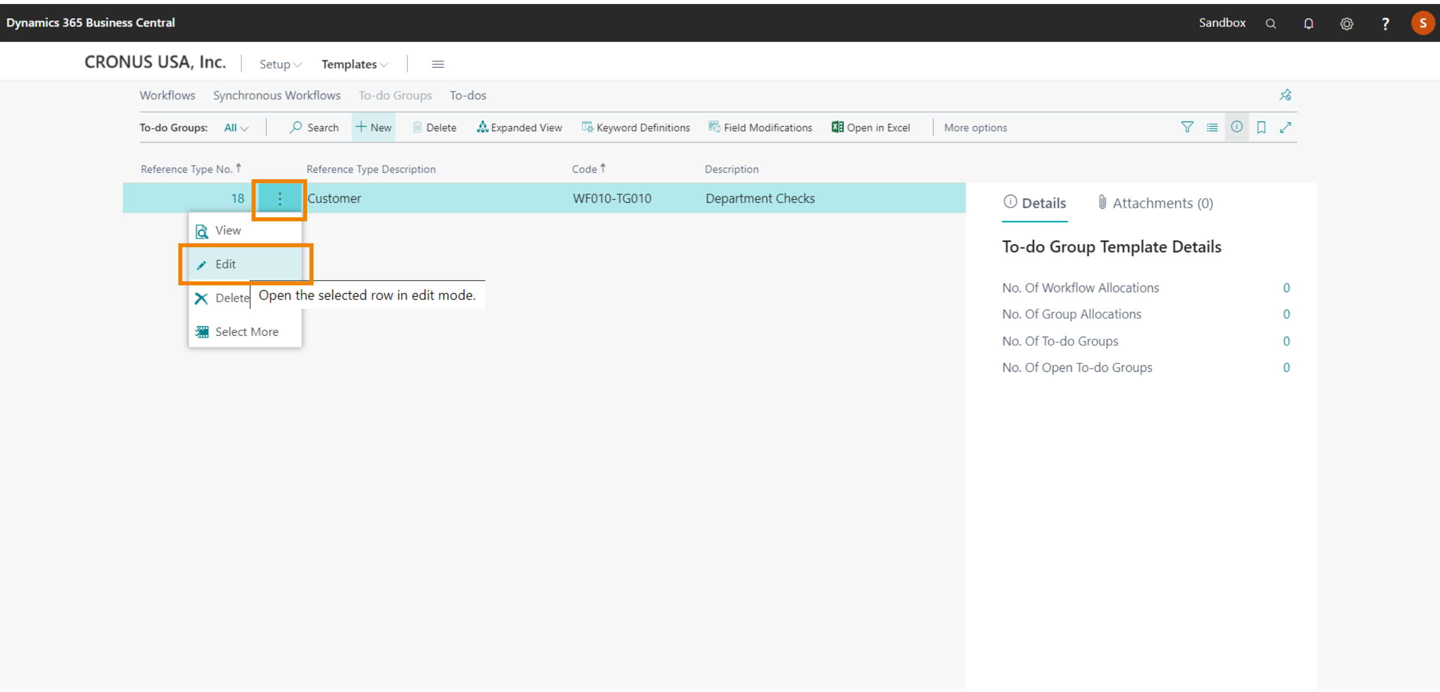
Scenario 1: New Customer – To-Do Group Template

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



Scenario 1: New Customer – To-Do Group Template

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



Scenario 1: New Customer – To-Do Group Template

1) To do Group Template:

Second line

Enter To-do in field Type

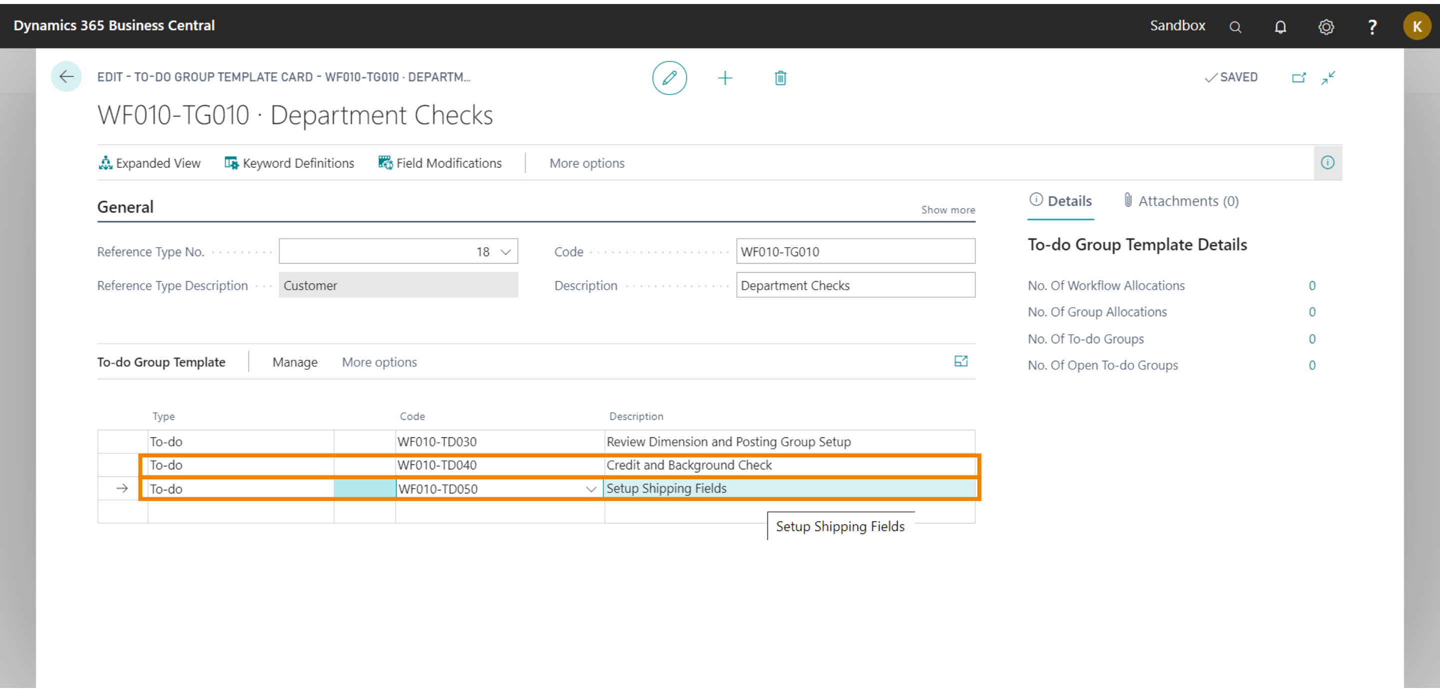
Enter Credit and Background Check in field Description

Third line

Enter To-do in field Type

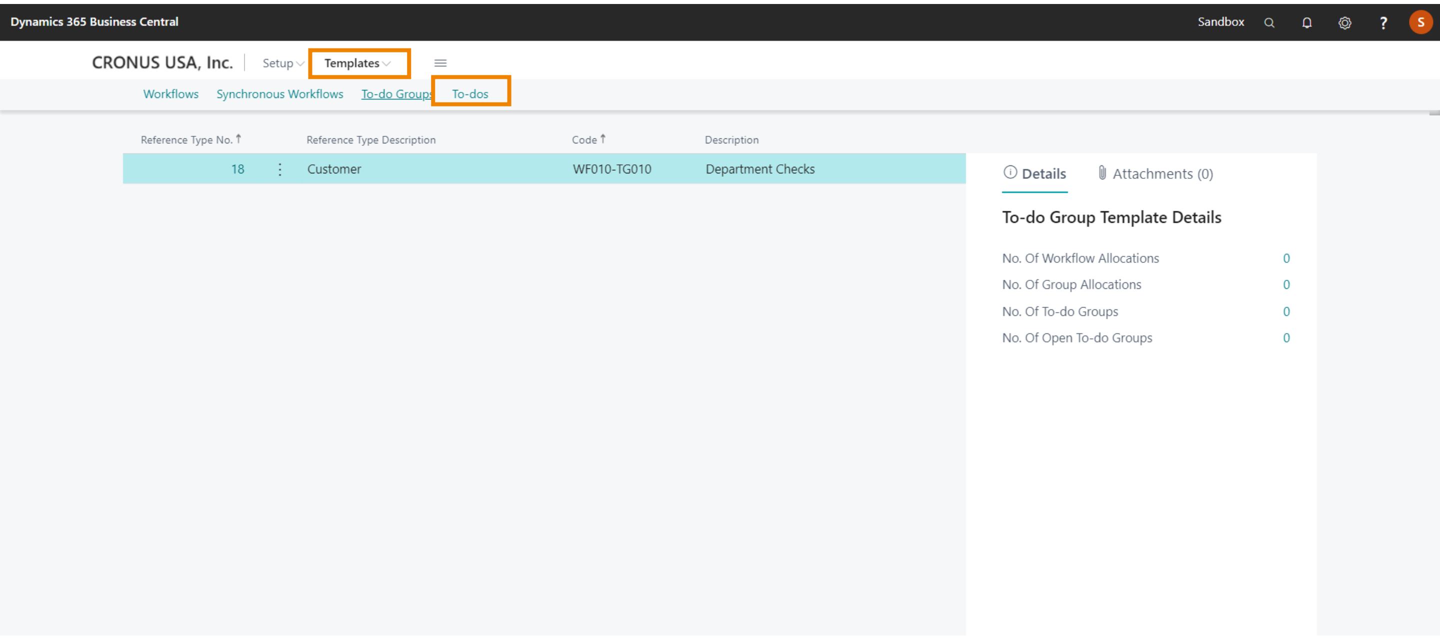
Enter Setup Shipping Fields in field Description

2) Close page



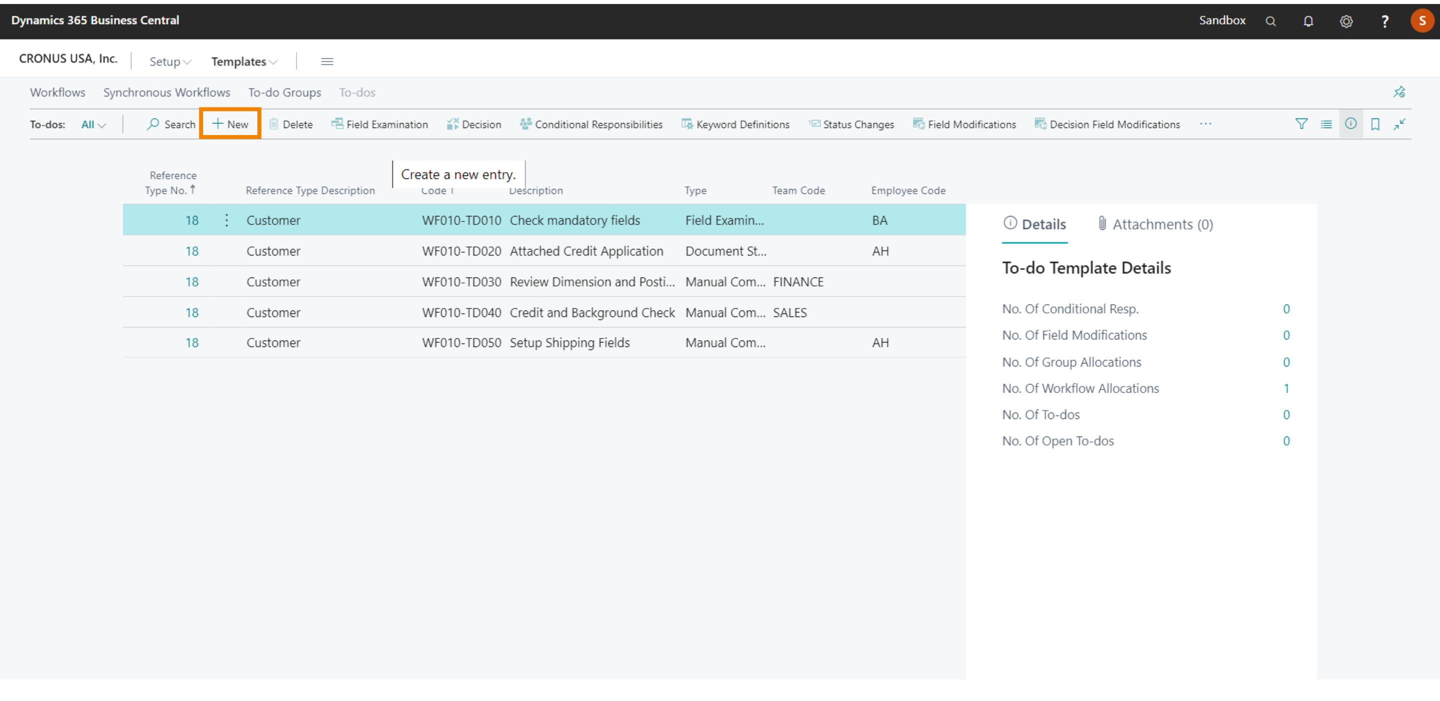
Scenario 1: New Customer – To-Do Template

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



Scenario 1: New Customer – To-Do Template

1) Click on +New



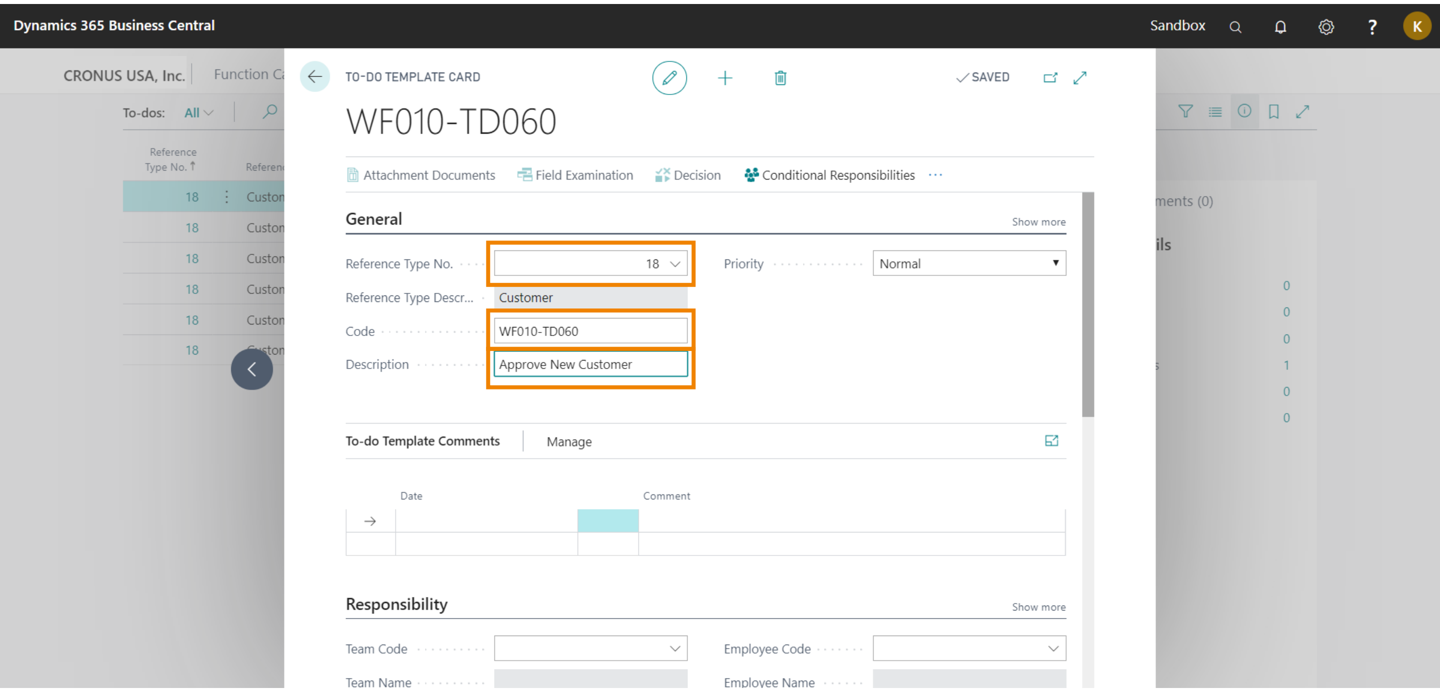
Scenario 1: New Customer – To-Do Template

1) **General:**

Enter Reference Type No. → 18

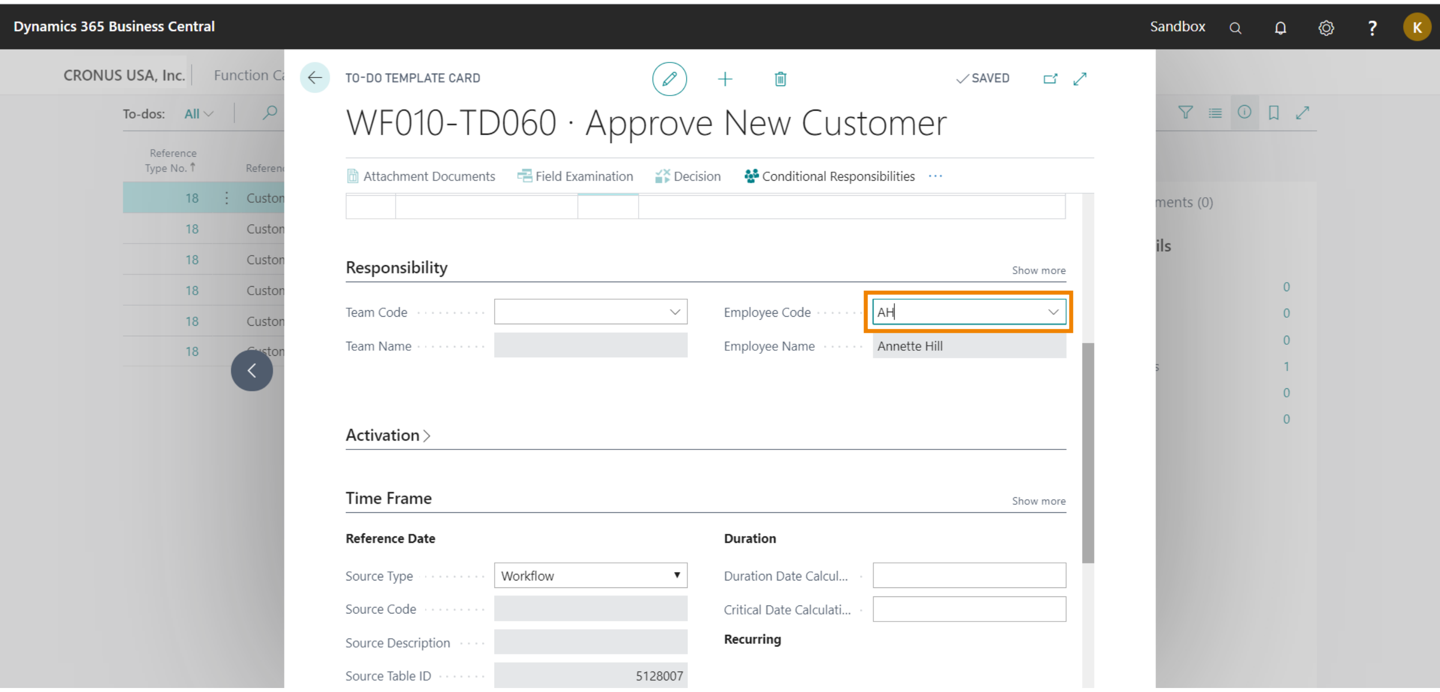
Enter Code → WF010-TD060

Enter Description → Approve New Customer



Scenario 1: New Customer – To-Do Template

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



Scenario 1: New Customer – To-Do Template

1) **Time Frame:**

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

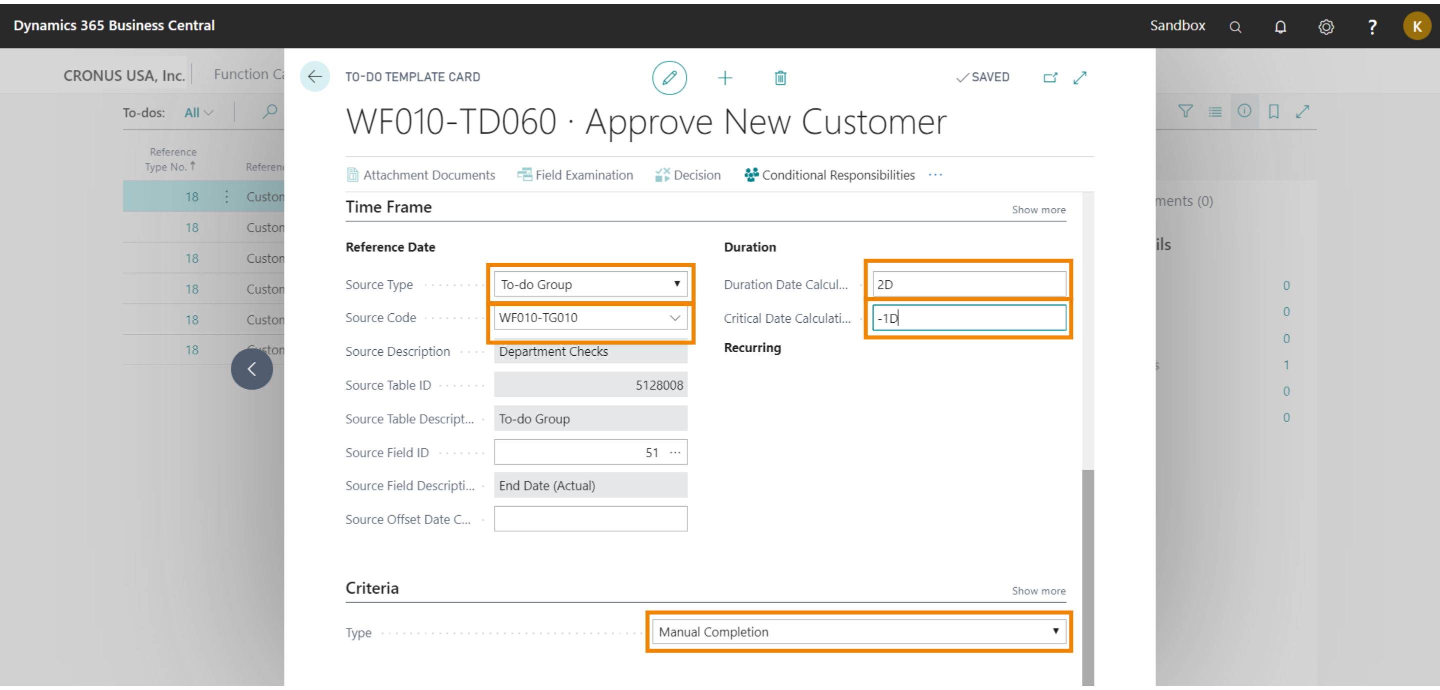
   Enter Source Code → WF010-TG010

   Enter Duration Date Calculation → 2D

   Enter Critical Date Calculation → -1D

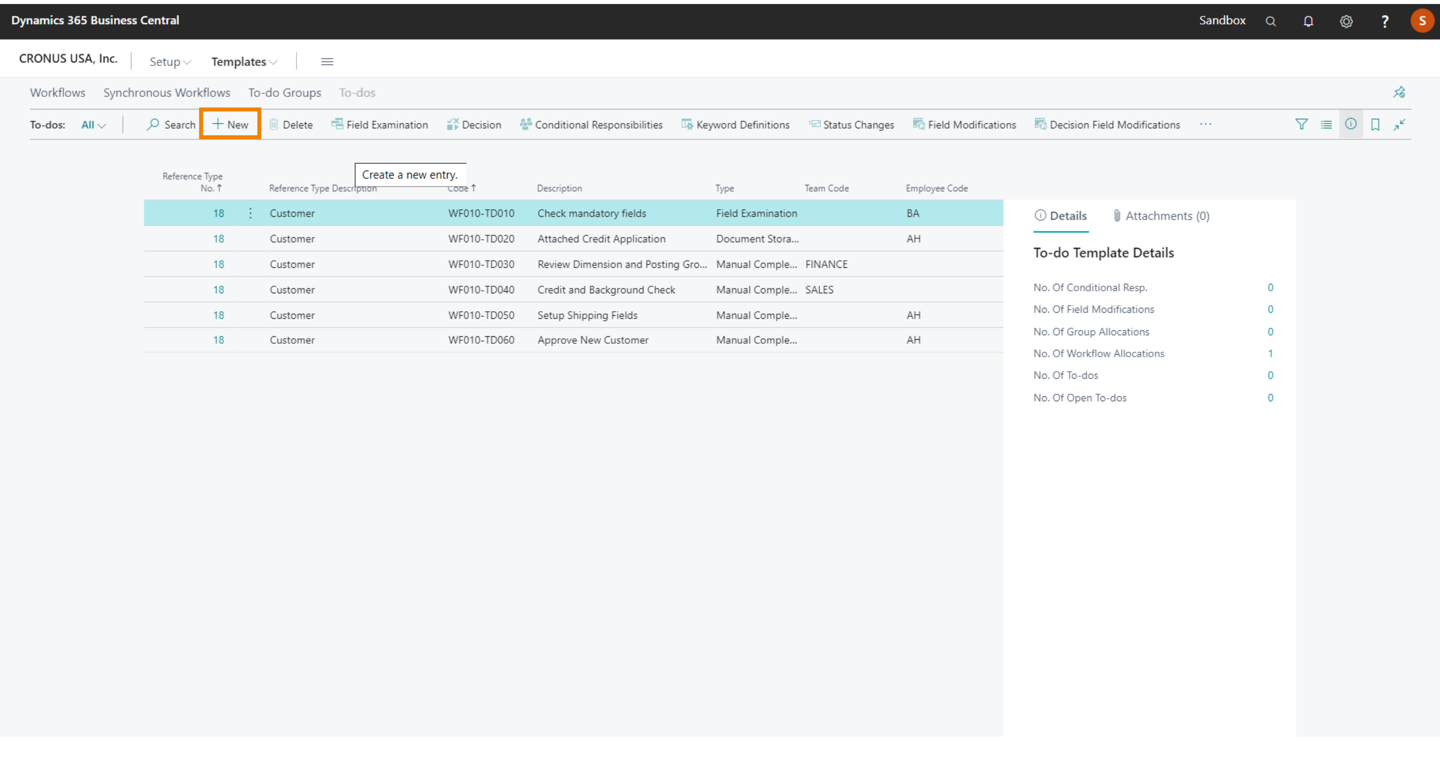
2) **Criteria:** Enter Type → Manual Completion

3) Close PAGE



Scenario 1: New Customer – To-Do Template

1) Click on +New



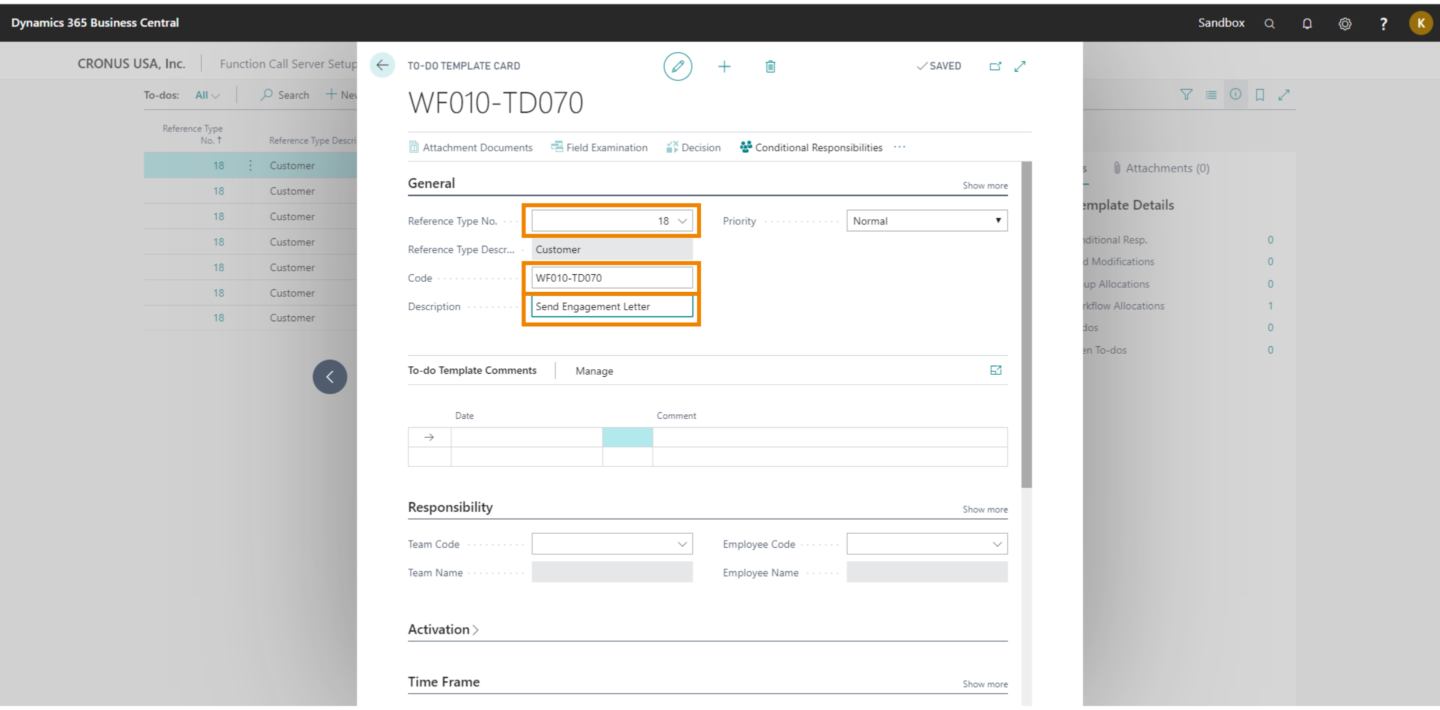
Scenario 1: New Customer – To-Do Template

1) **General:**

Enter Reference Type No. → 18

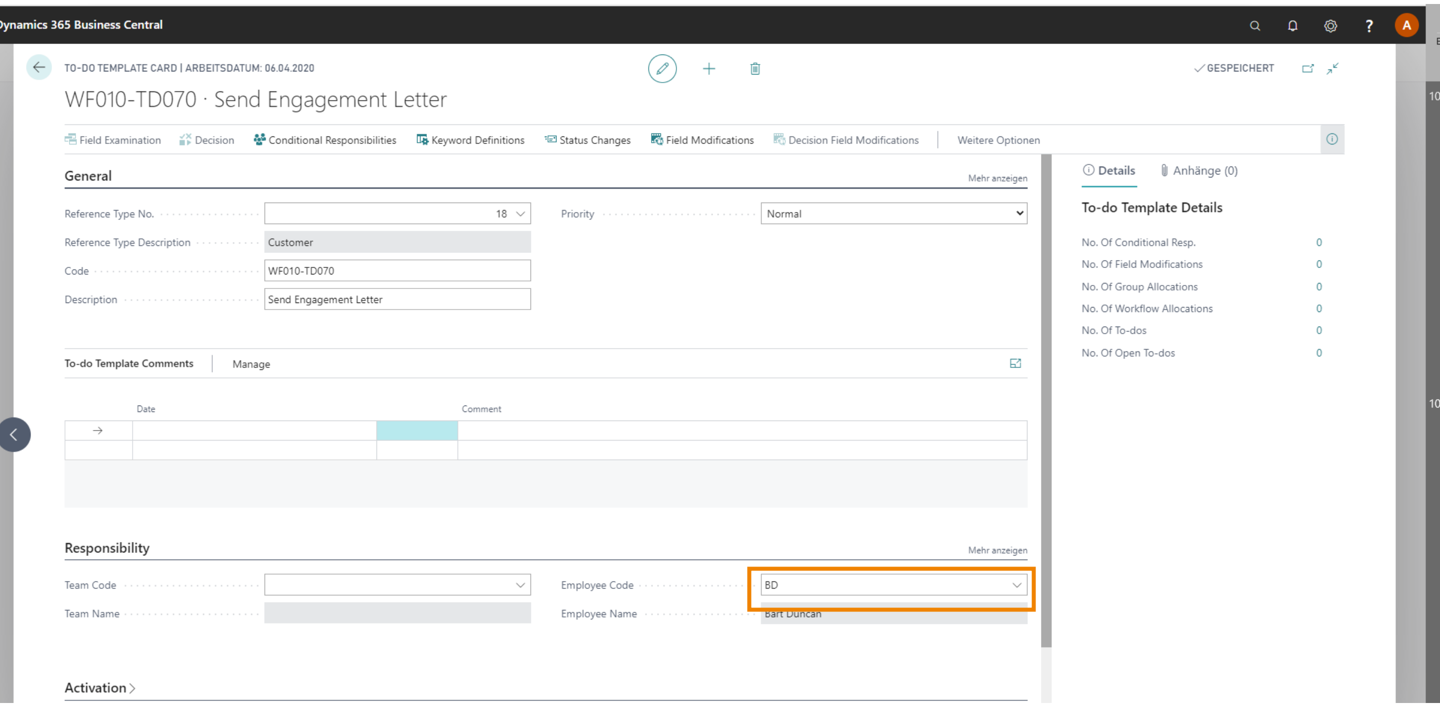
Enter Code → WF010-TD070

Enter Description → Send Engagement Letter



Scenario 1: New Customer – To-Do Template

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



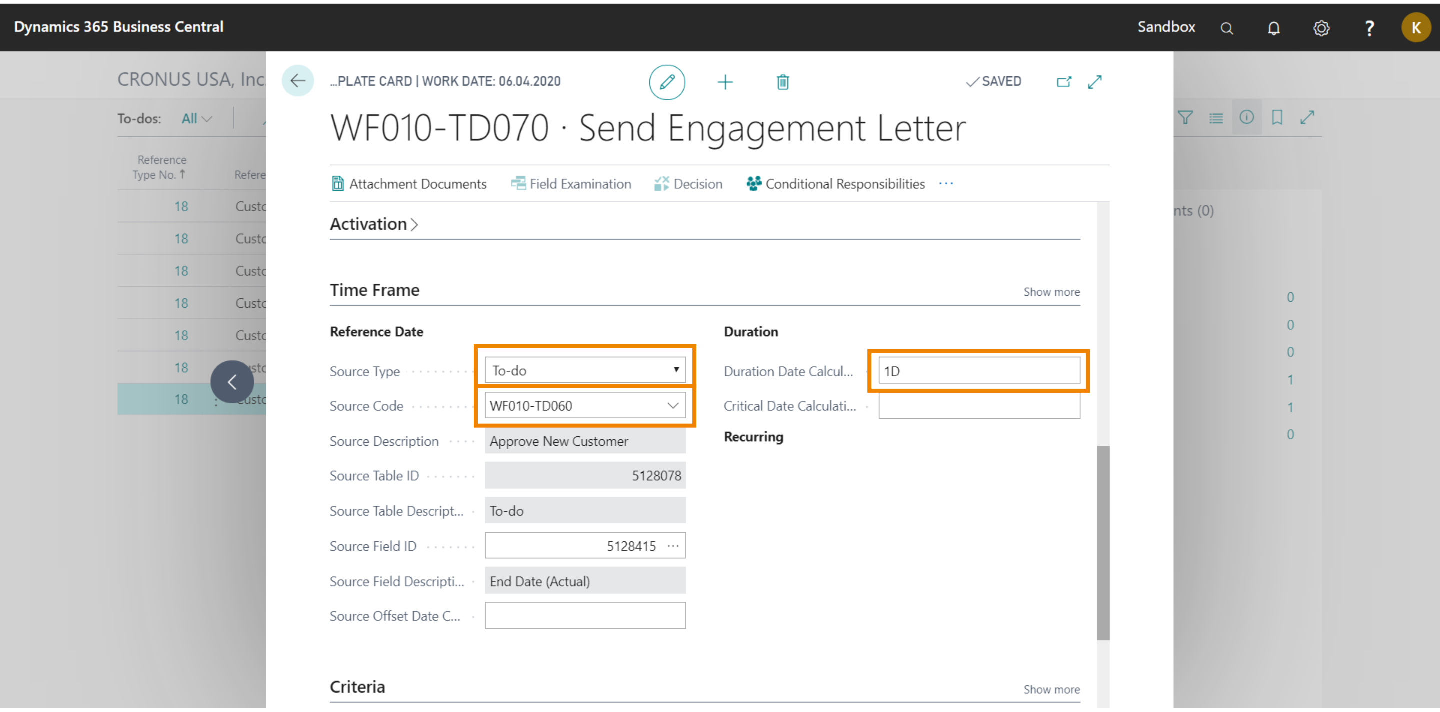
Scenario 1: New Customer – To-Do Template

1) Time Frame:

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

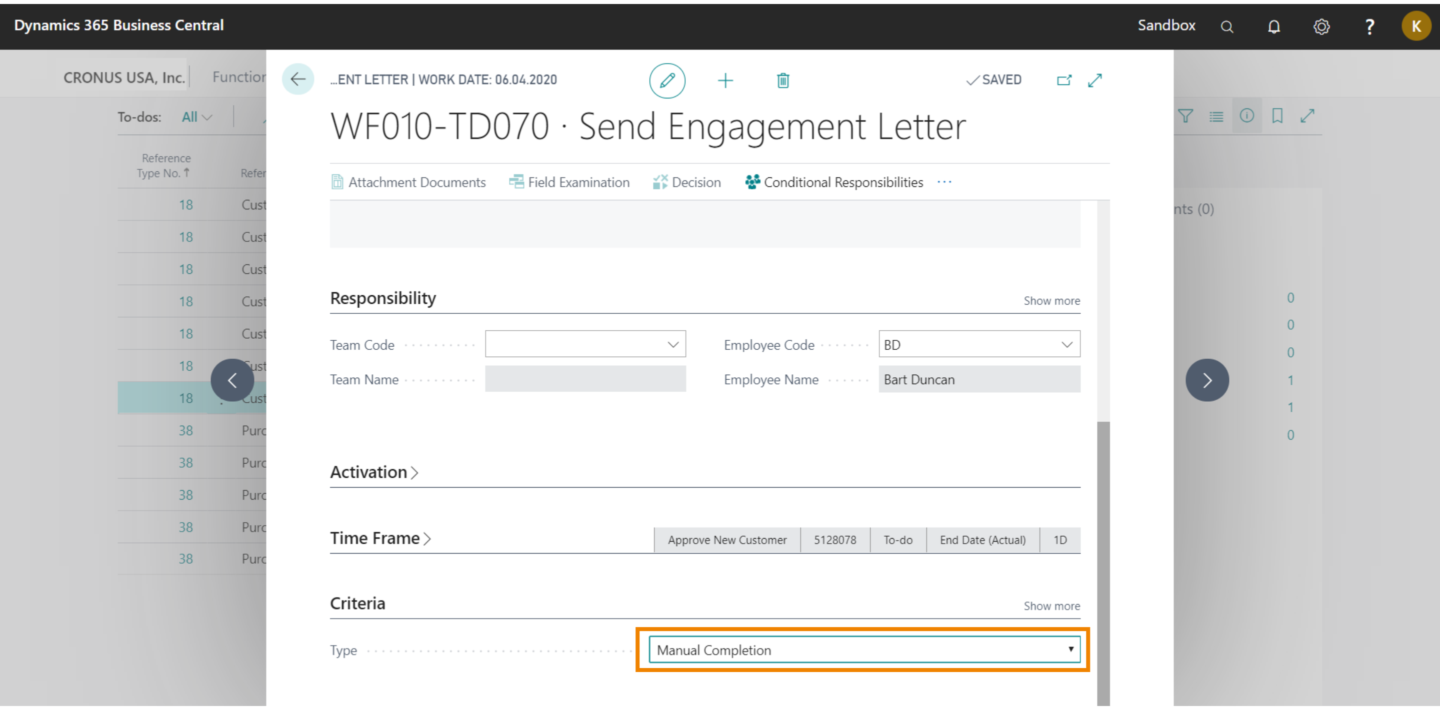
Enter Source Code → WF010-TD060

Enter Duration Date Calculation → 1D



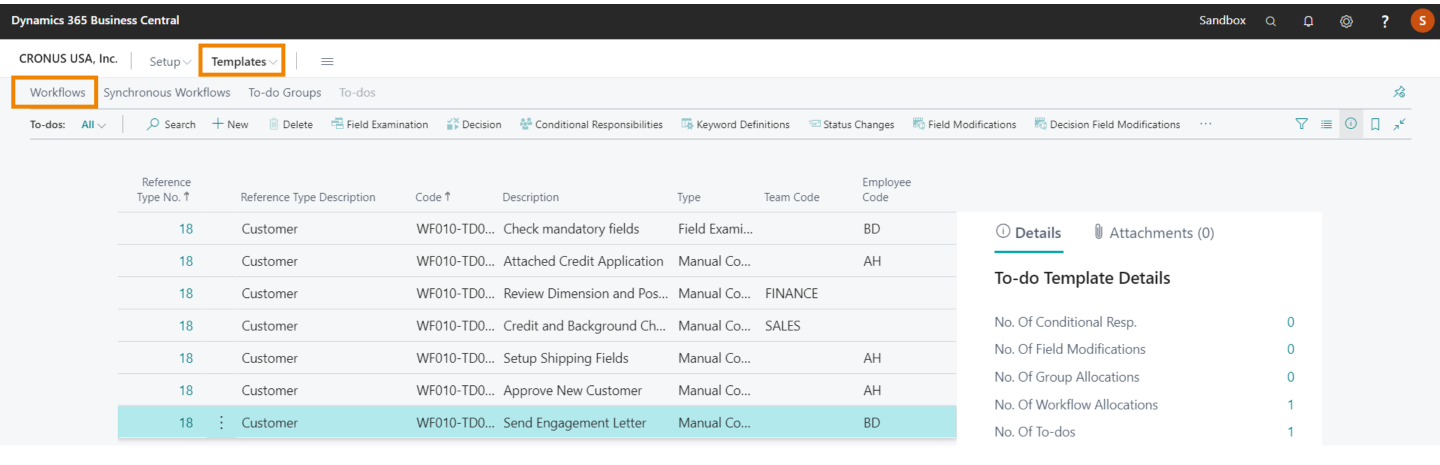
Scenario 1: New Customer – To-Do Template

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



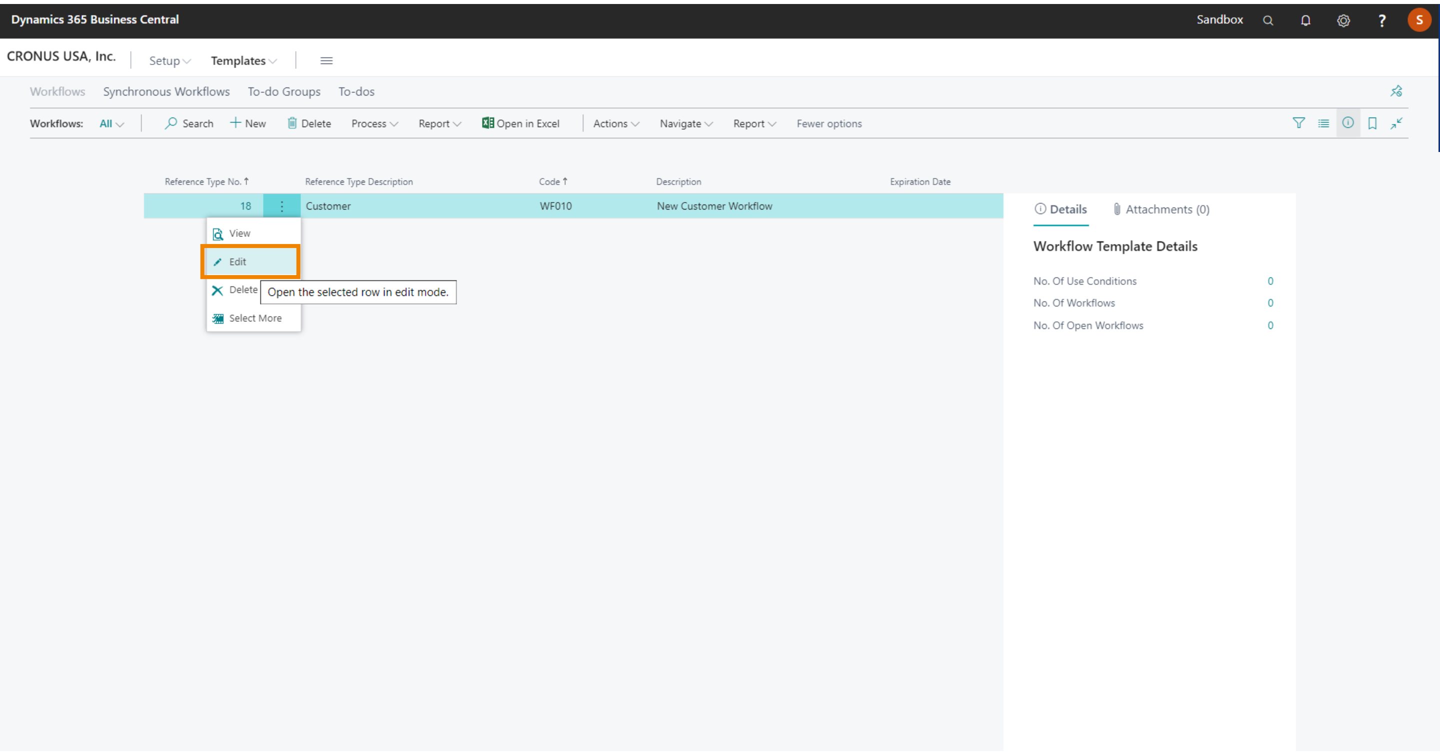
Scenario 1: New Customer – Workflow Template

1) Click on Templates
2) Click on Workflows



Scenario 1: New Customer – Workflow Template

1) Click on Edit



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

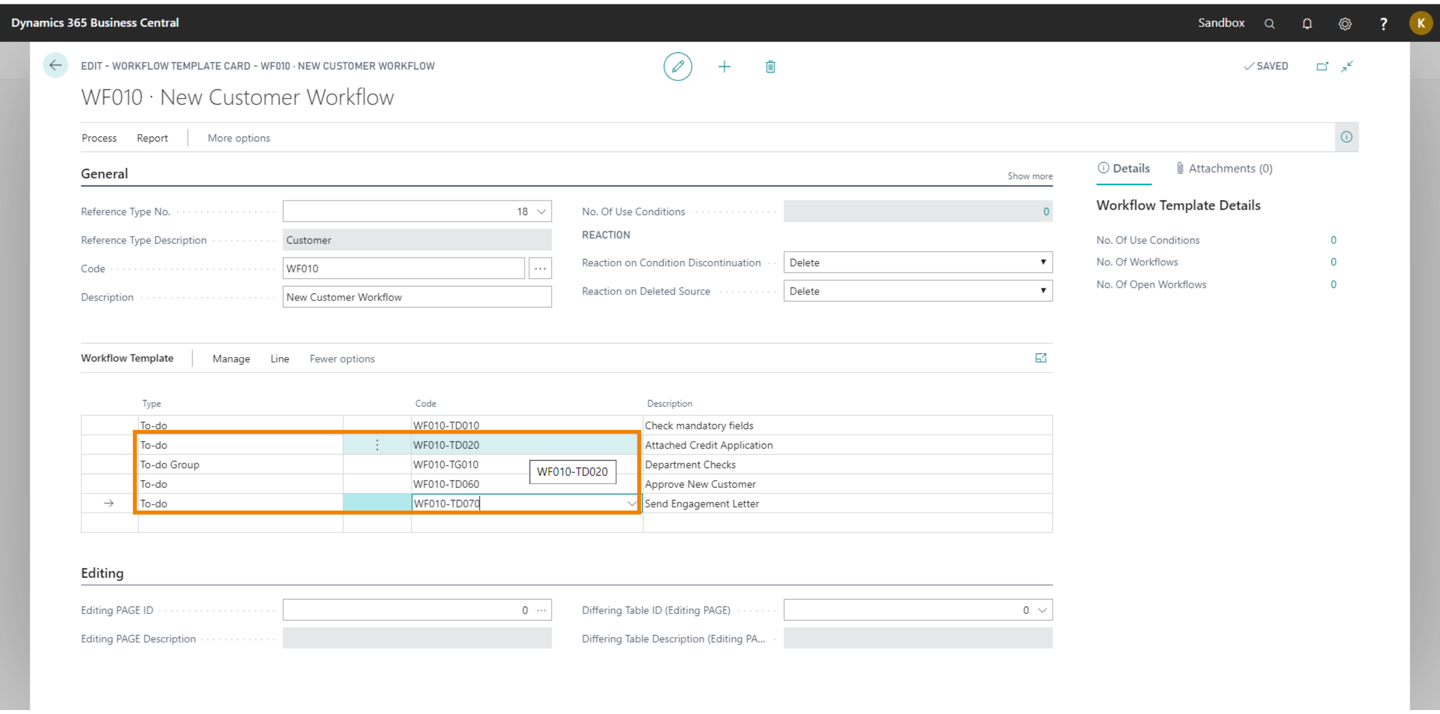
Enter Code → WF010-TD060

Fifth line

Enter Type → To-do

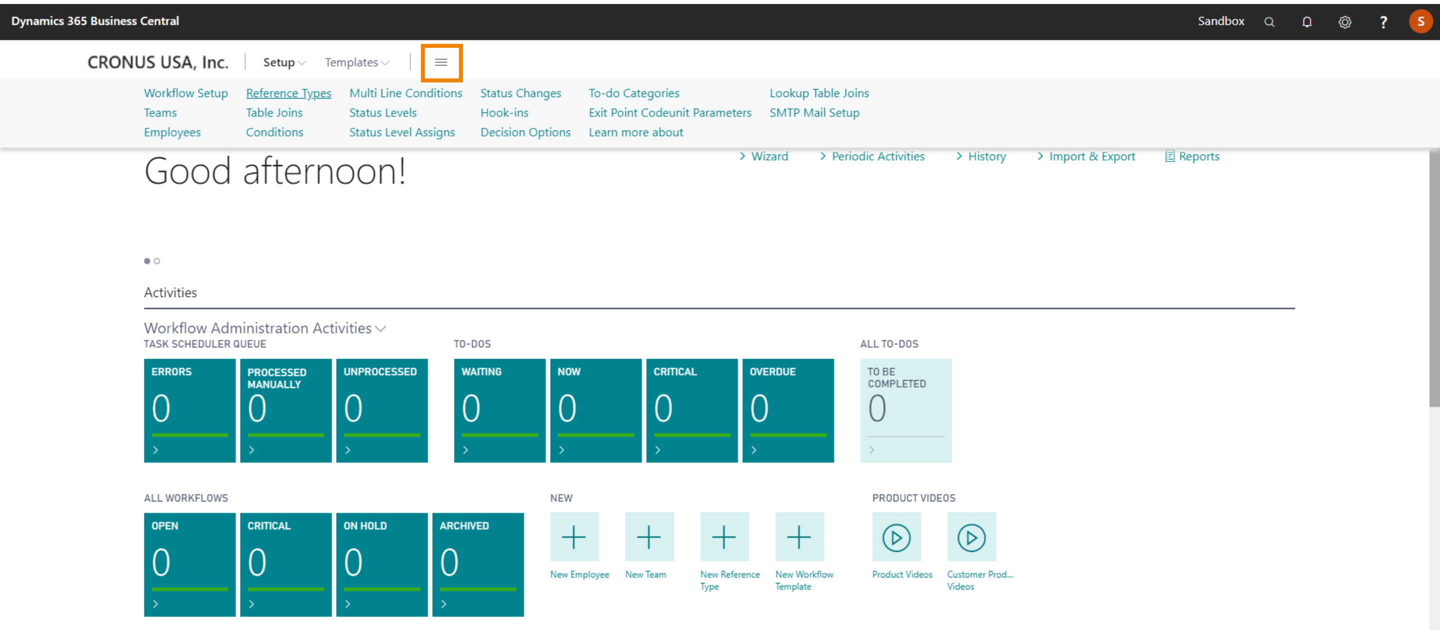
Enter Code → WF010-TD070

2) Close PAGE



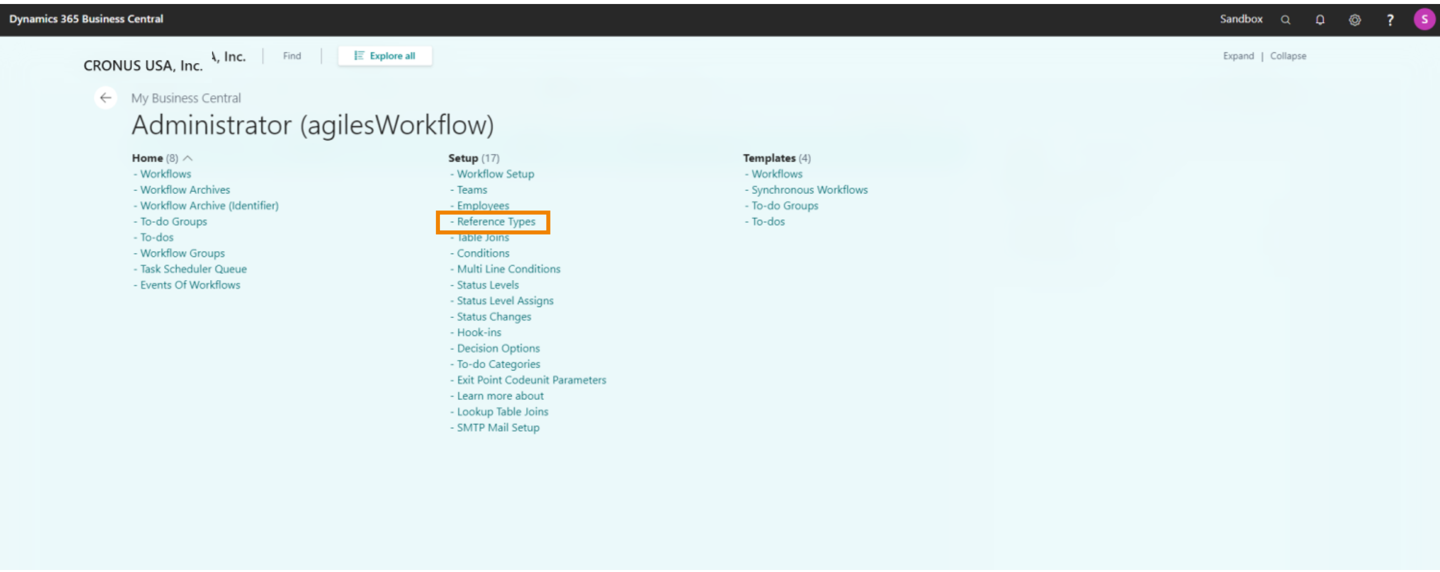
Scenario 1: New Customer – Reference Types

1) Click on the Burger Menu



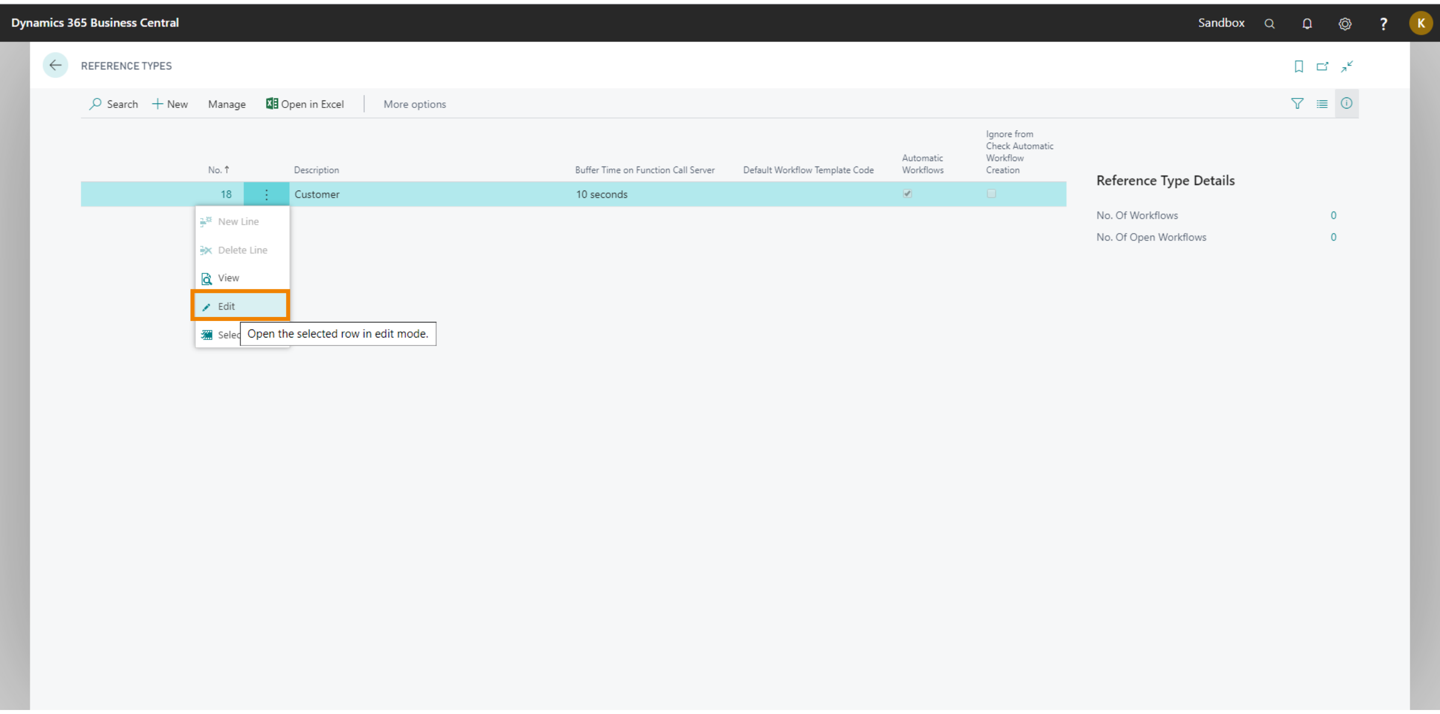
Scenario 1: New Customer – Reference Types

1) Click on Reference Types



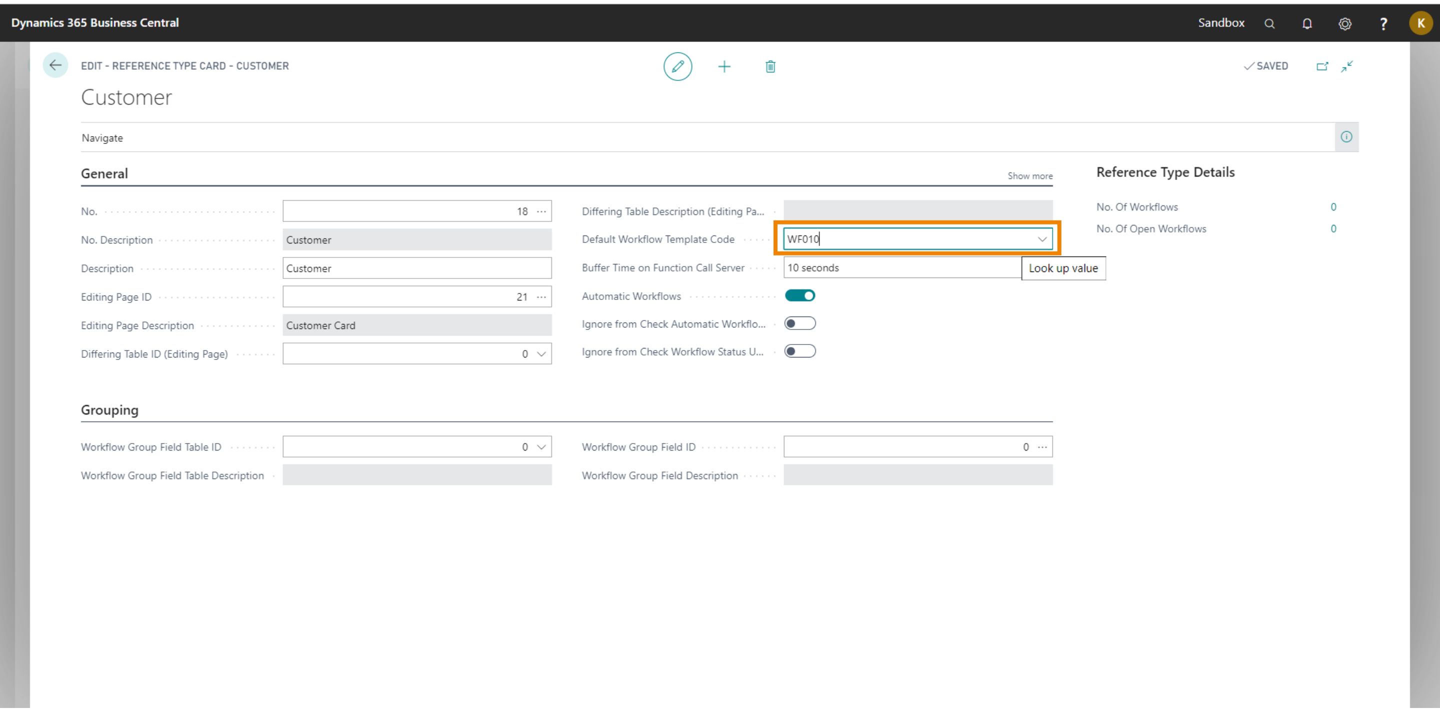
Scenario 1: New Customer – Reference Types

1) Click on Edit



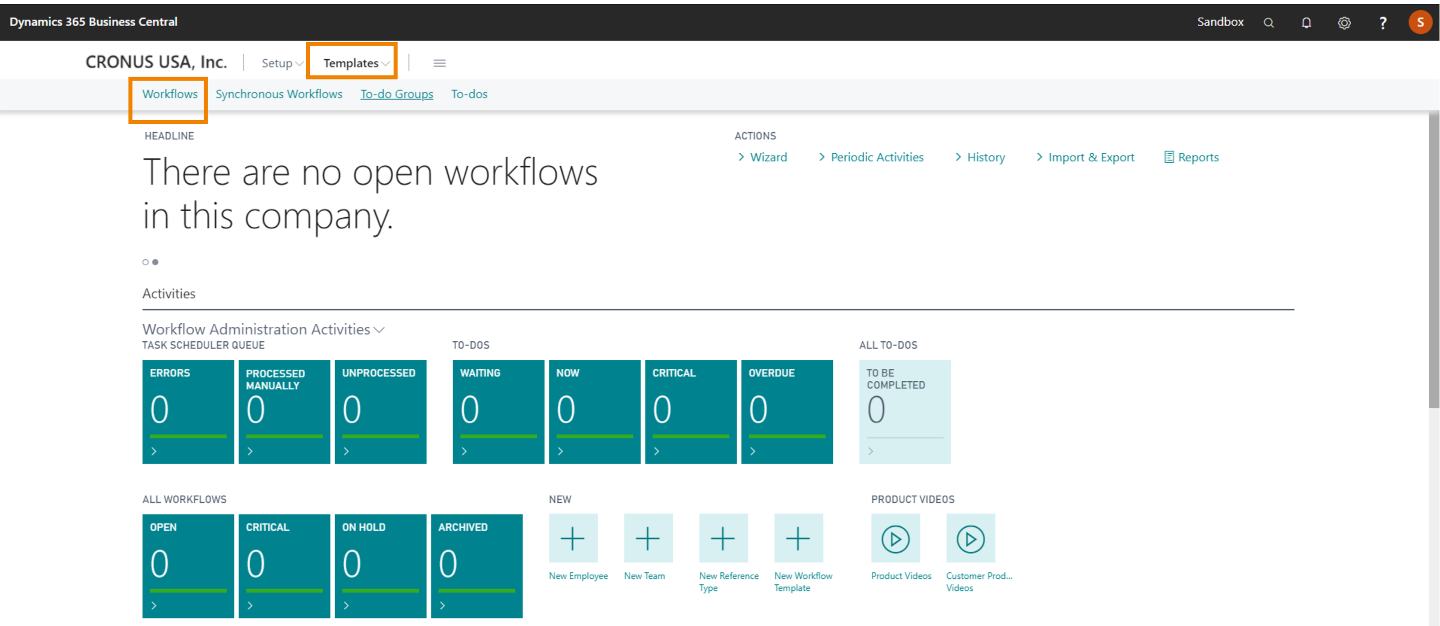
Scenario 1: New Customer – Reference Types

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



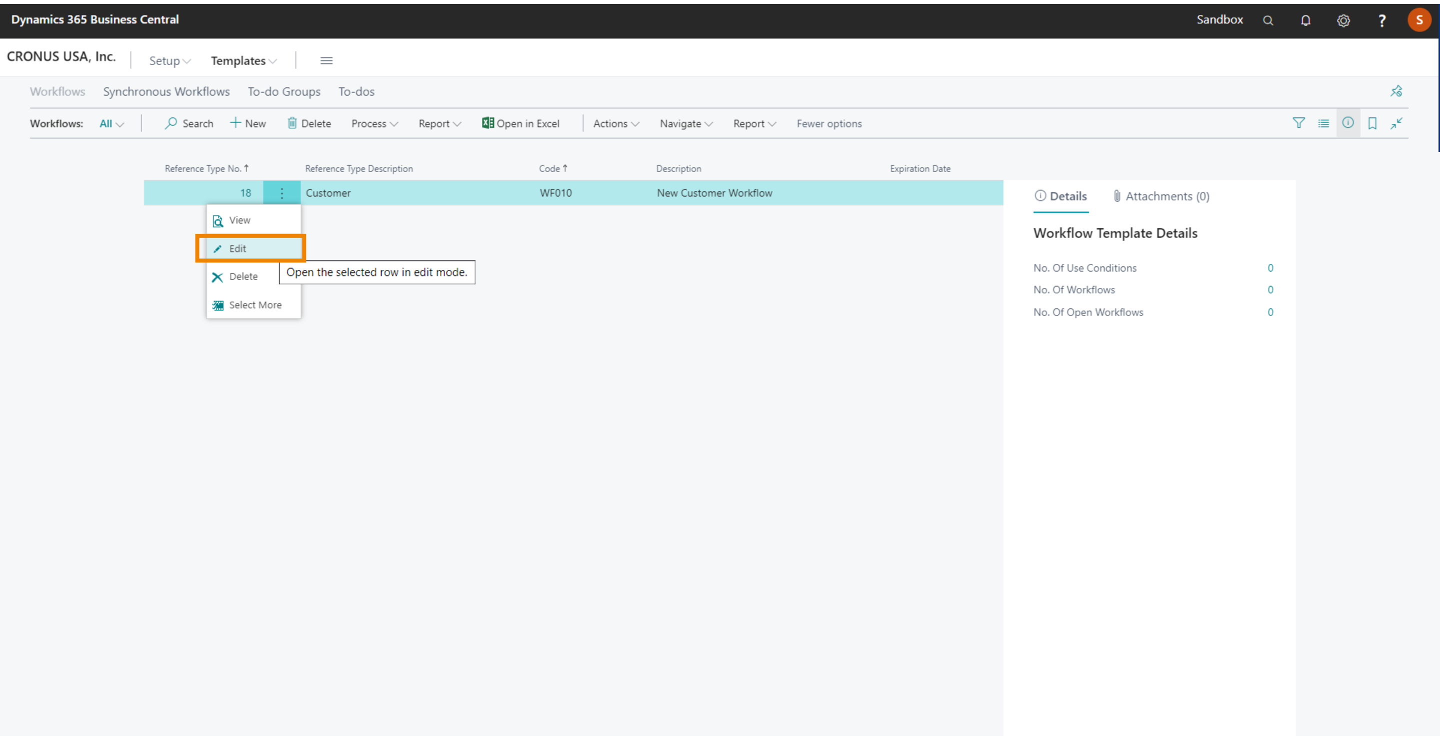
Scenario 1: New Customer – Workflow Template

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



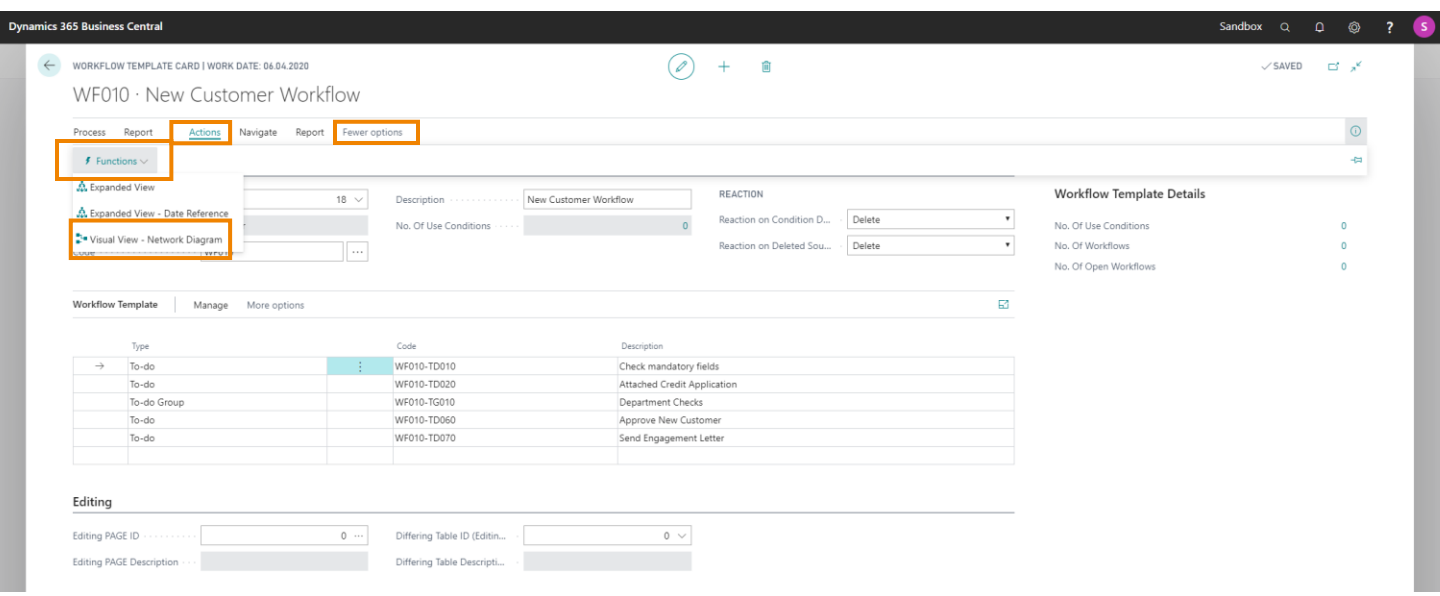
Scenario 1: New Customer – Workflow Template

1) Click on Edit



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



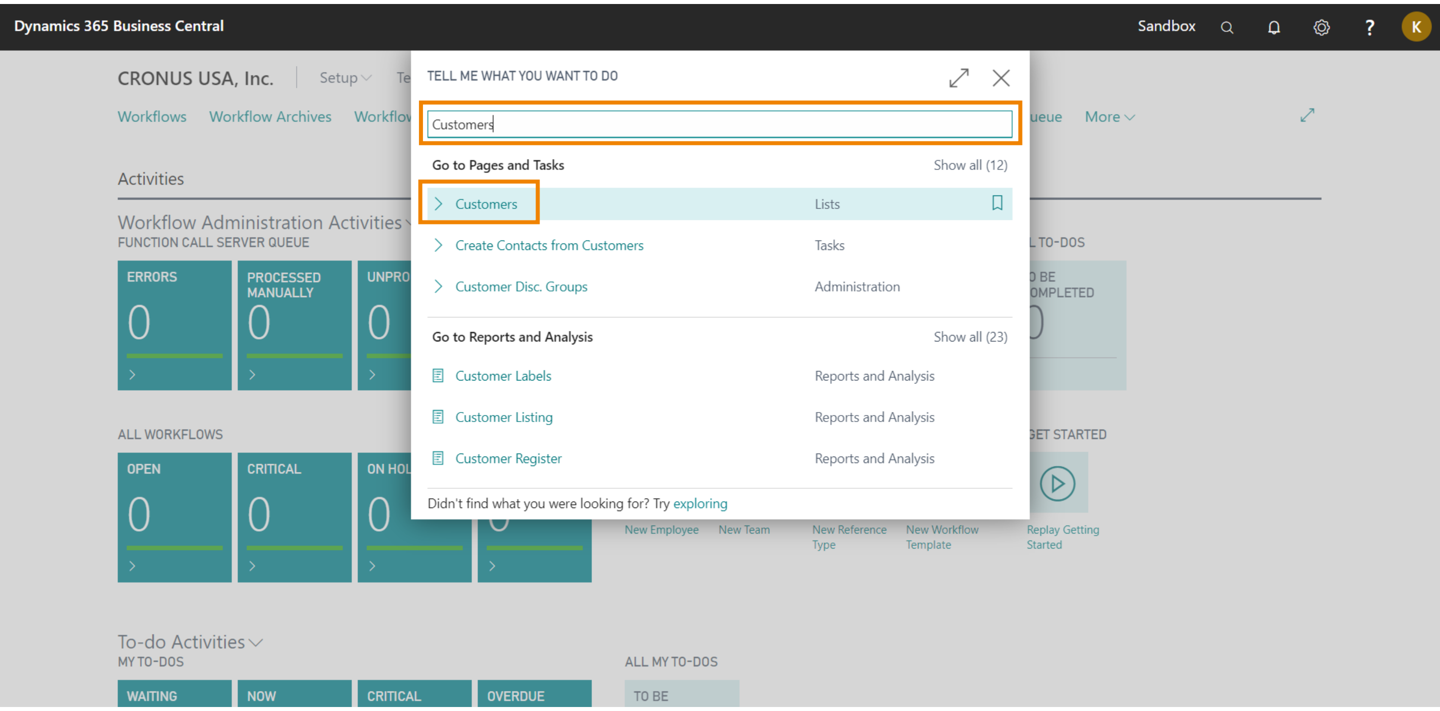
Scenario 1: New Customer – Workflow Template

1) Final Workflow Template

User Perspective Scenario 1

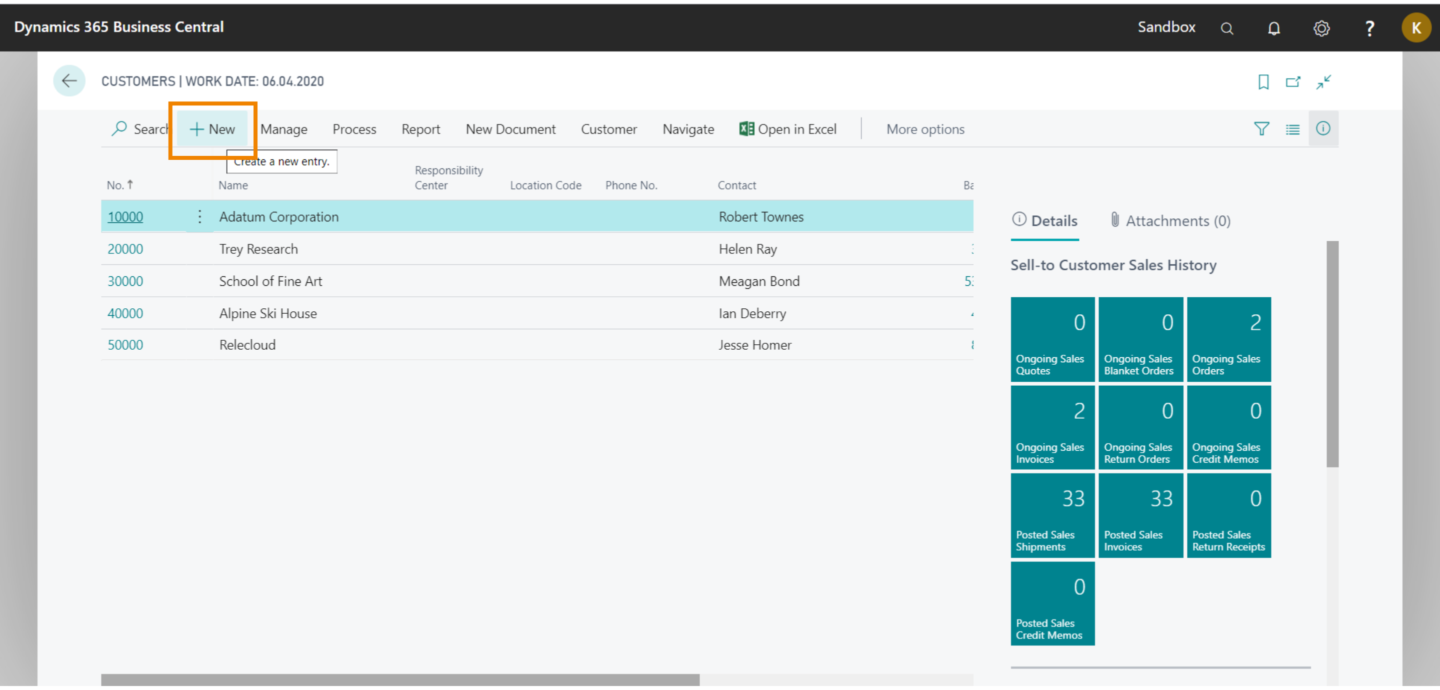
User Perspective Scenario 1

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



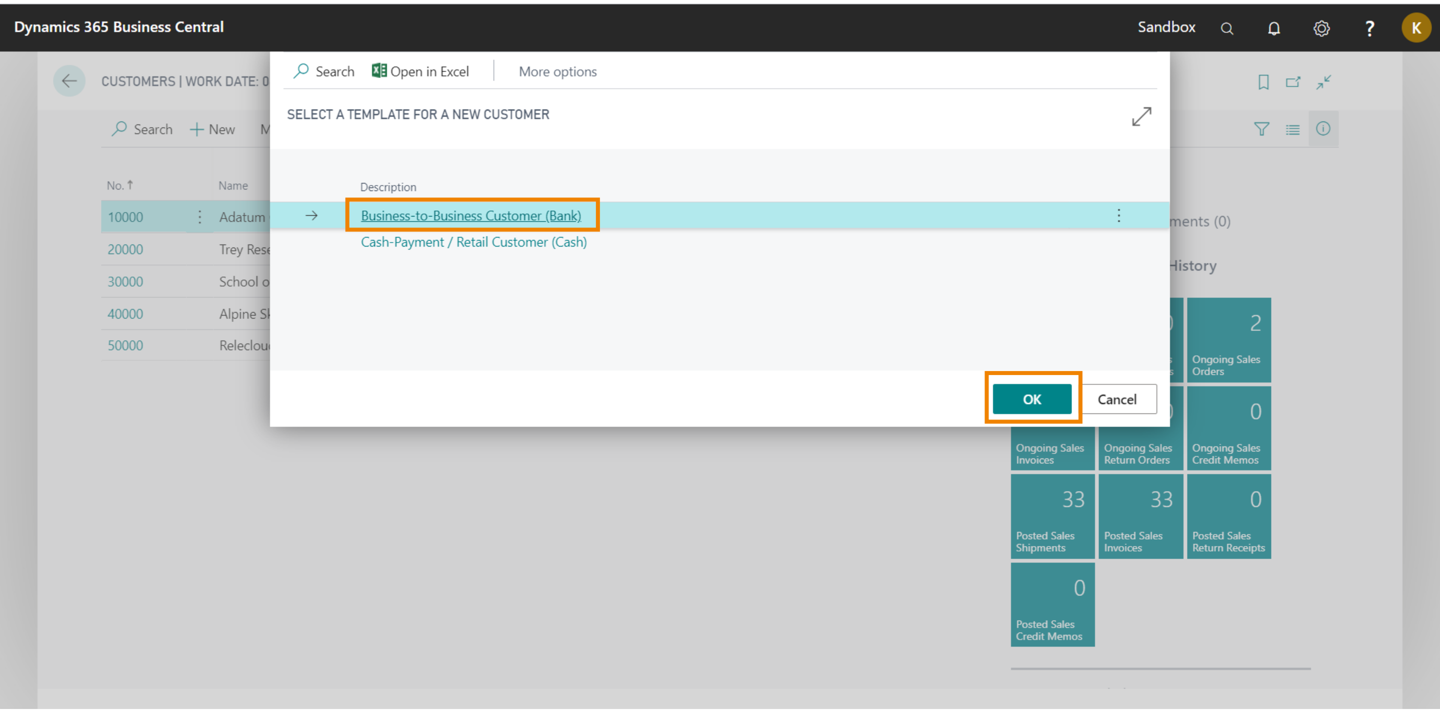
User Perspective Scenario 1

1) Click on +New



User Perspective Scenario 1

1) Click on B2B
2) Click on Ok

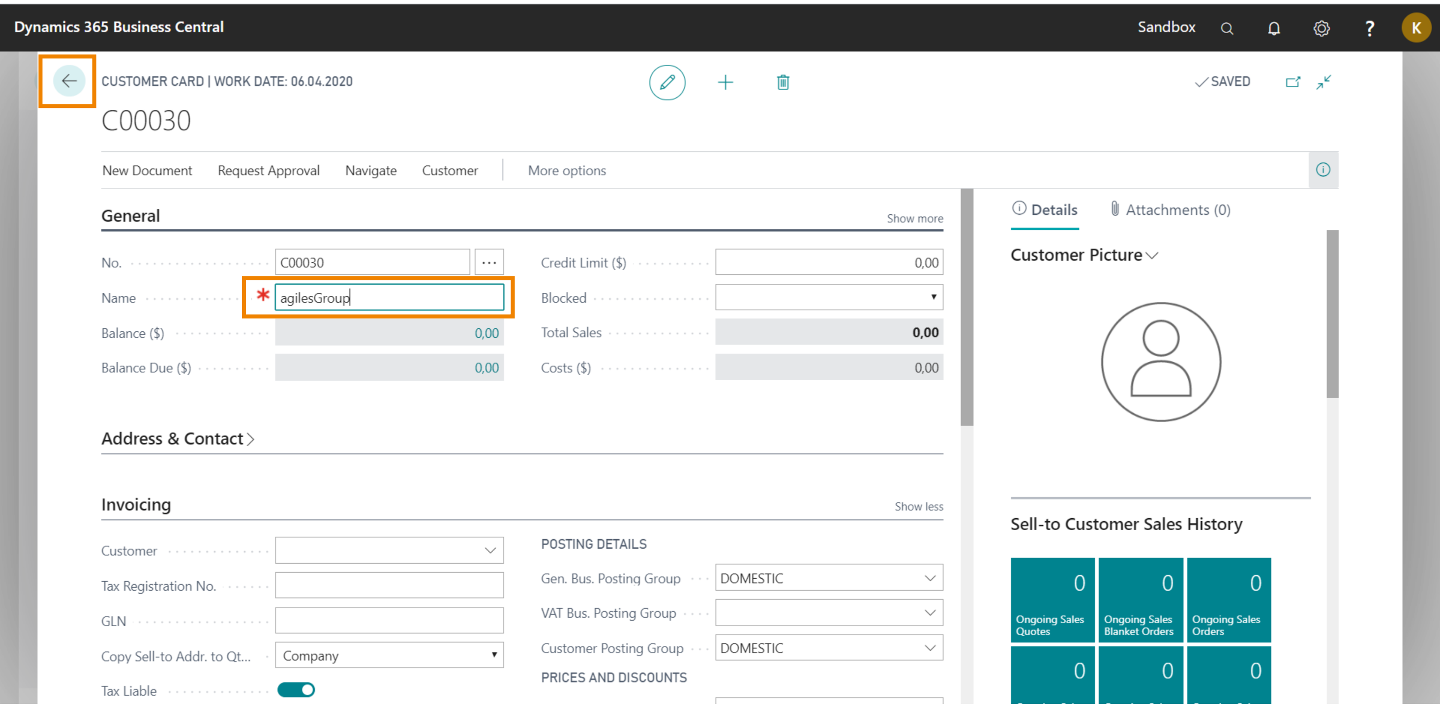


User Perspective Scenario 1

1) **General:**

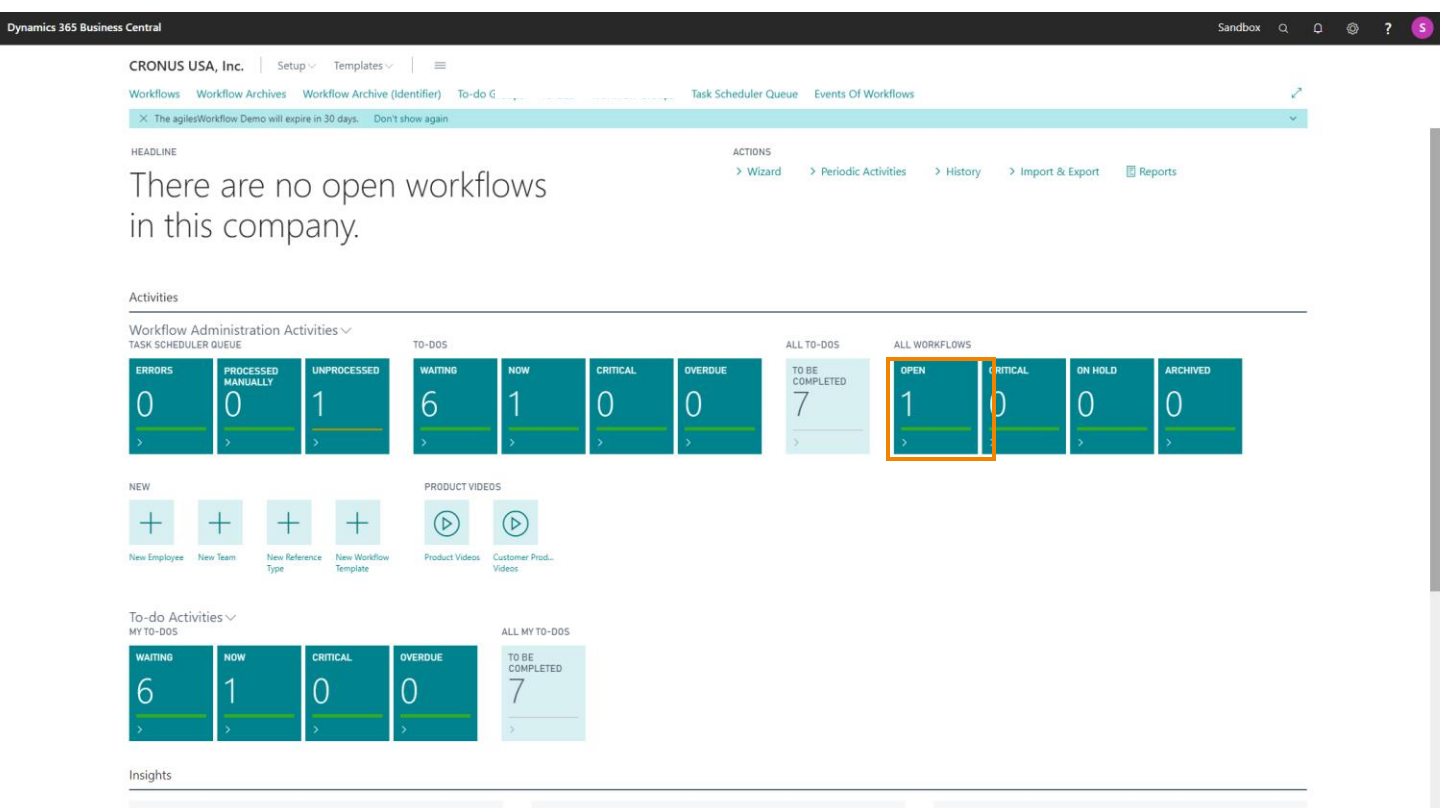
   Enter Name → e.g. Aptean Group

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



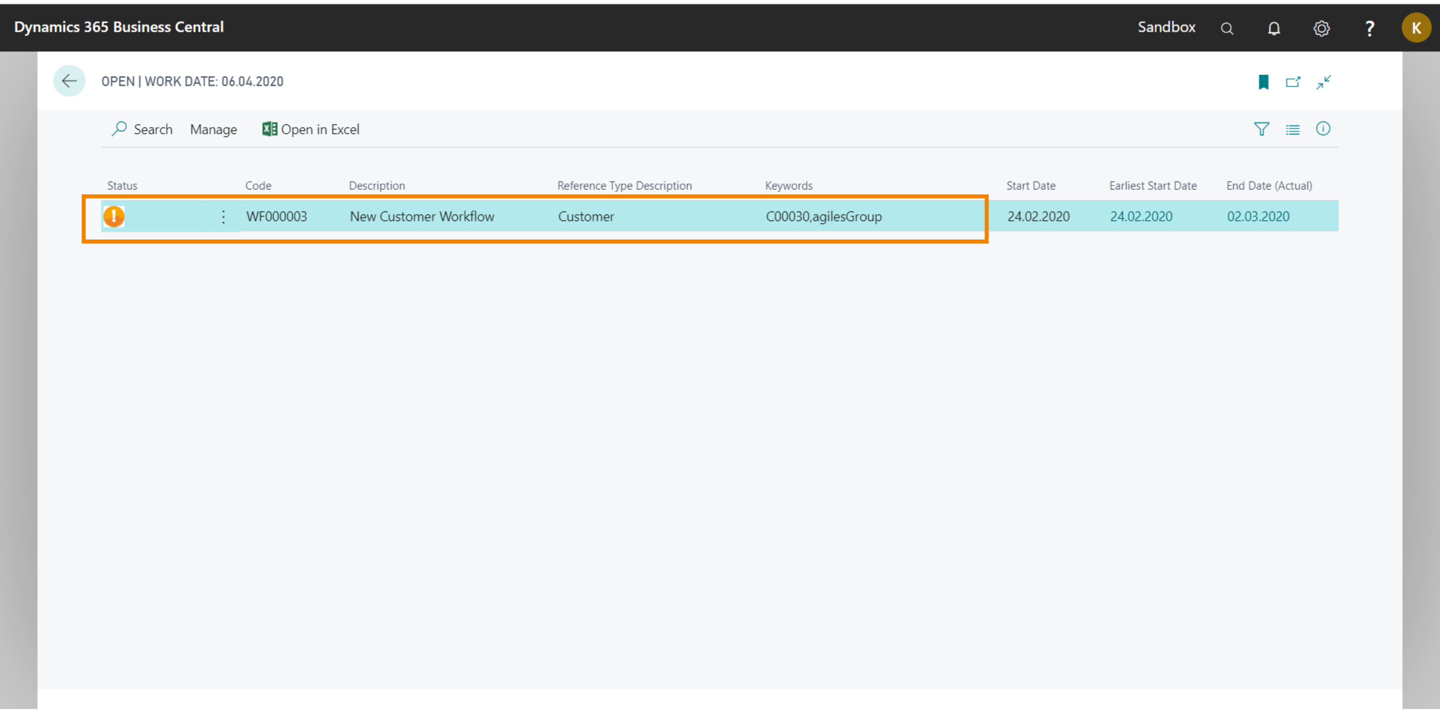
User Perspective Scenario 1

1) All Workflows: Click on Activity Open



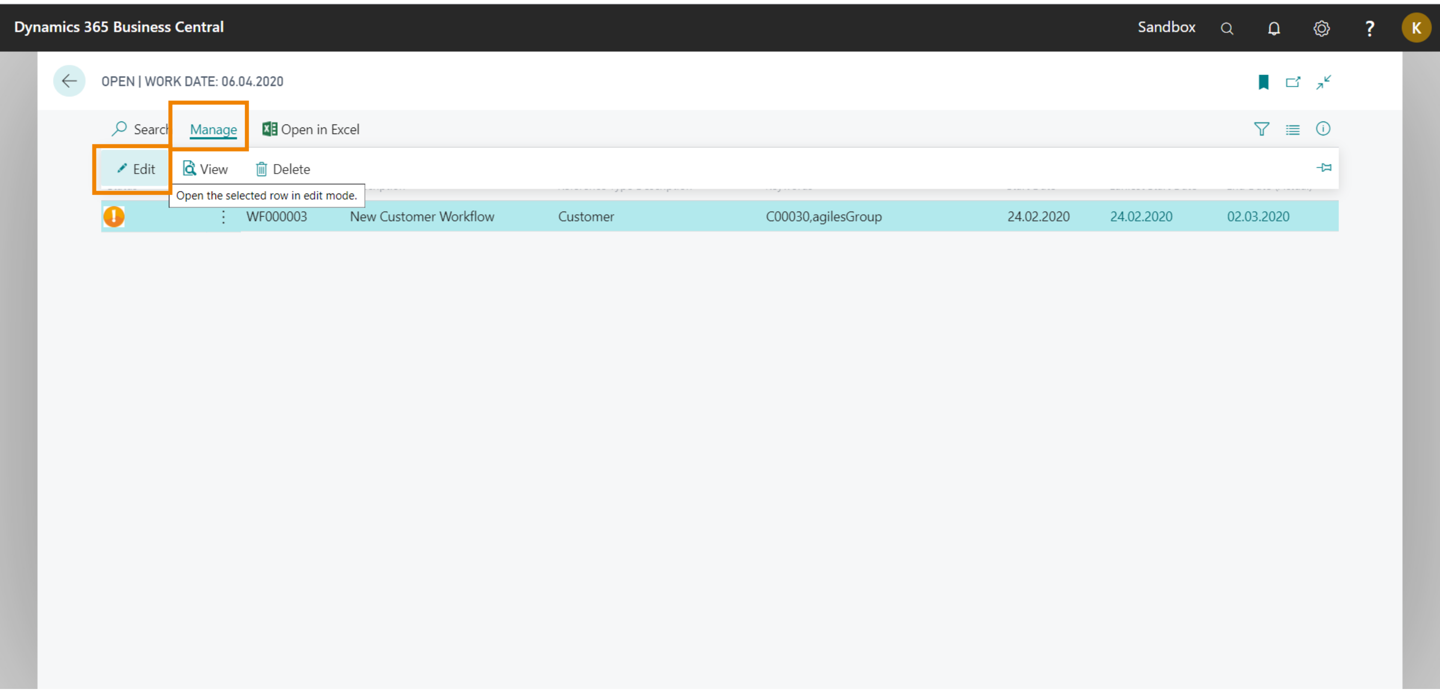
User Perspective Scenario 1

1) Show new created workflow



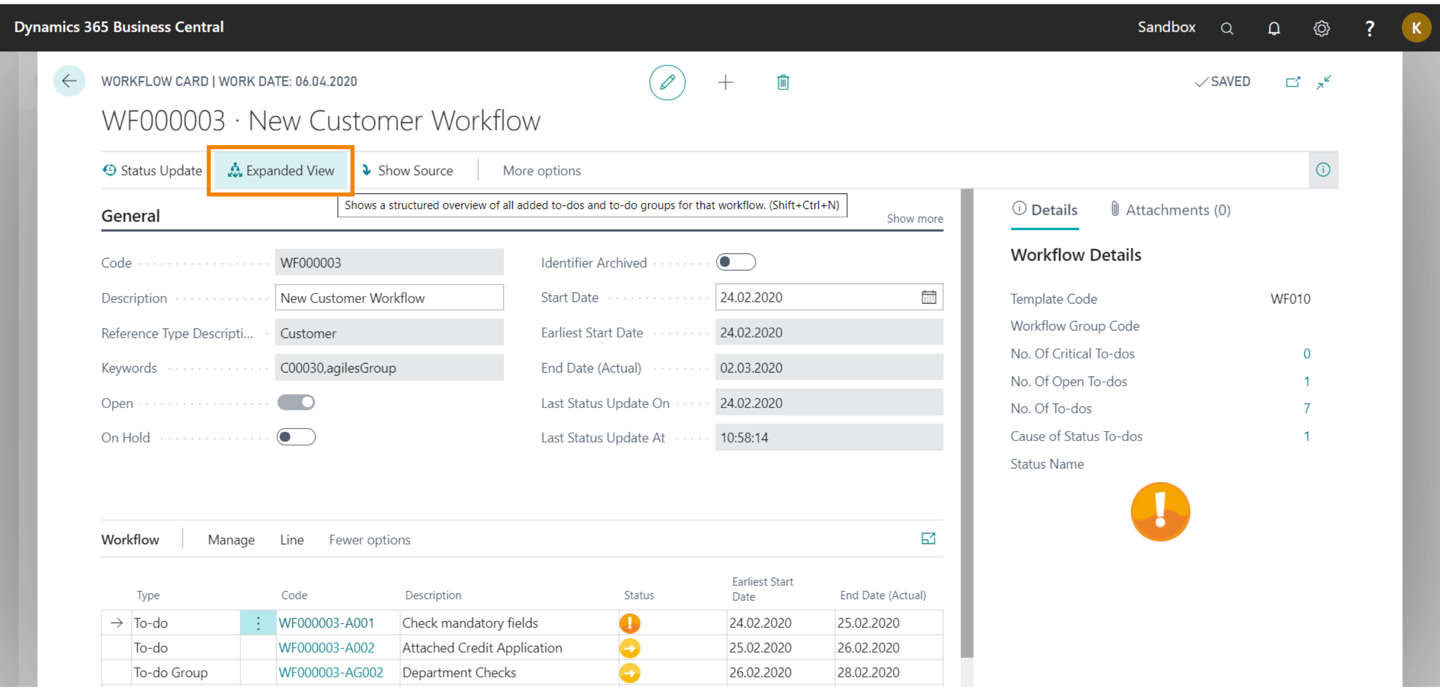
User Perspective Scenario 1

1) Click on Manage
2) Click on Edit



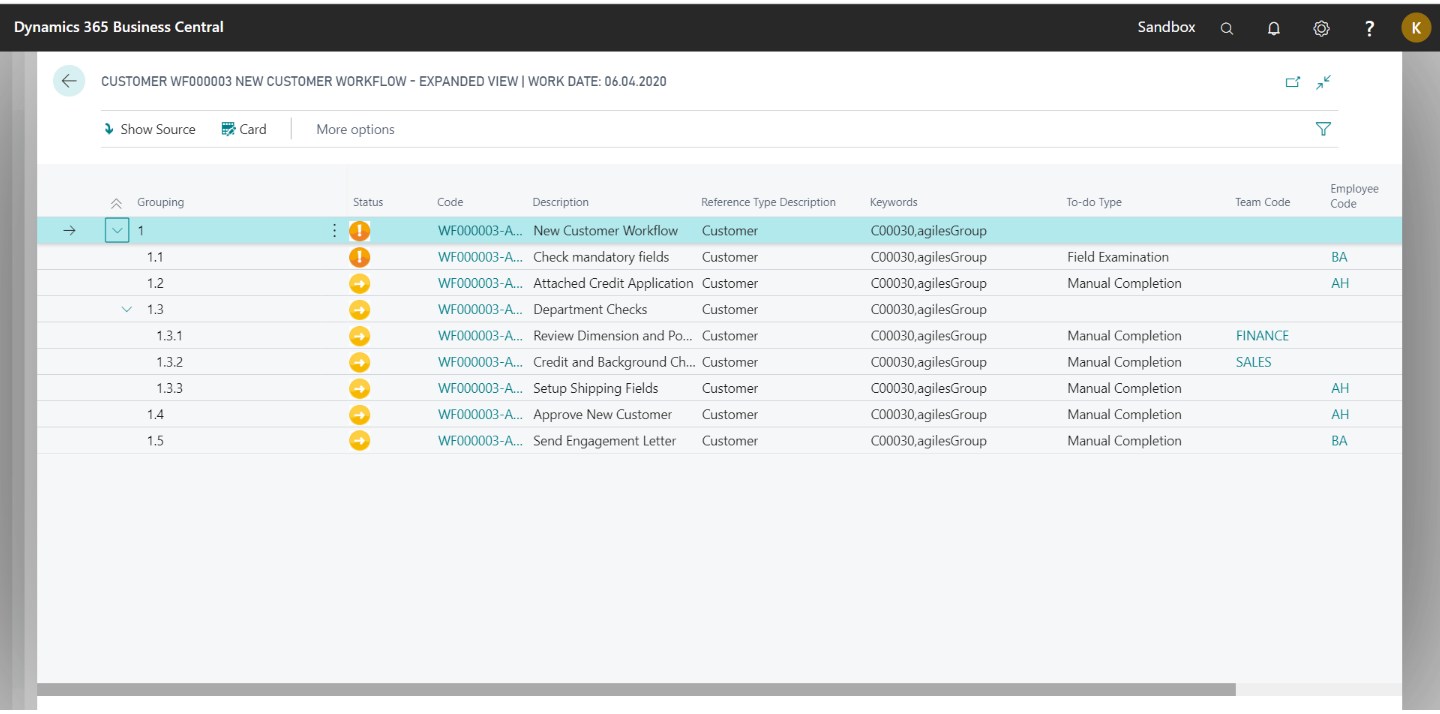
User Perspective Scenario 1

1) Click on Expanded View



User Perspective Scenario 1

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

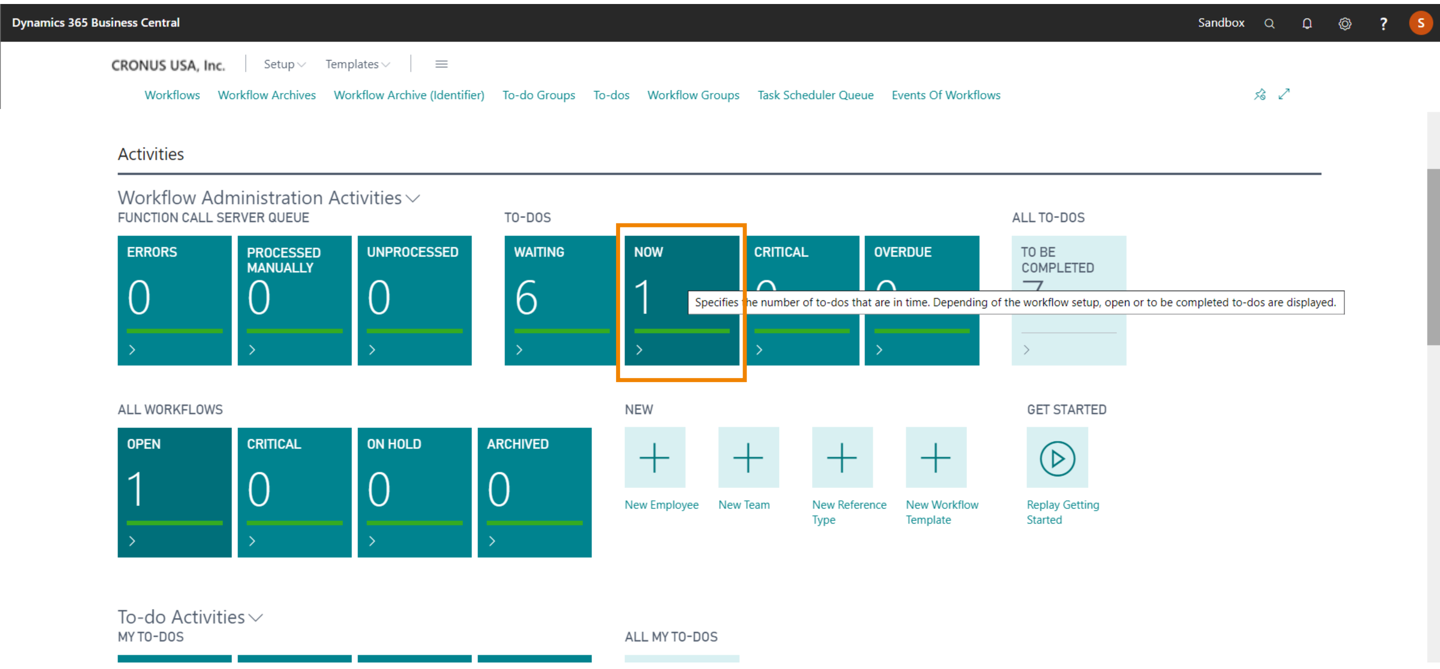

Dynamics 365 Business Central
Sandbox
K
CUSTOMER WF000003 NEW CUSTOMER WORKFLOW - EXPANDED VIEW | WORK DATE: 06.04.2020
Show Source
Card
More options

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

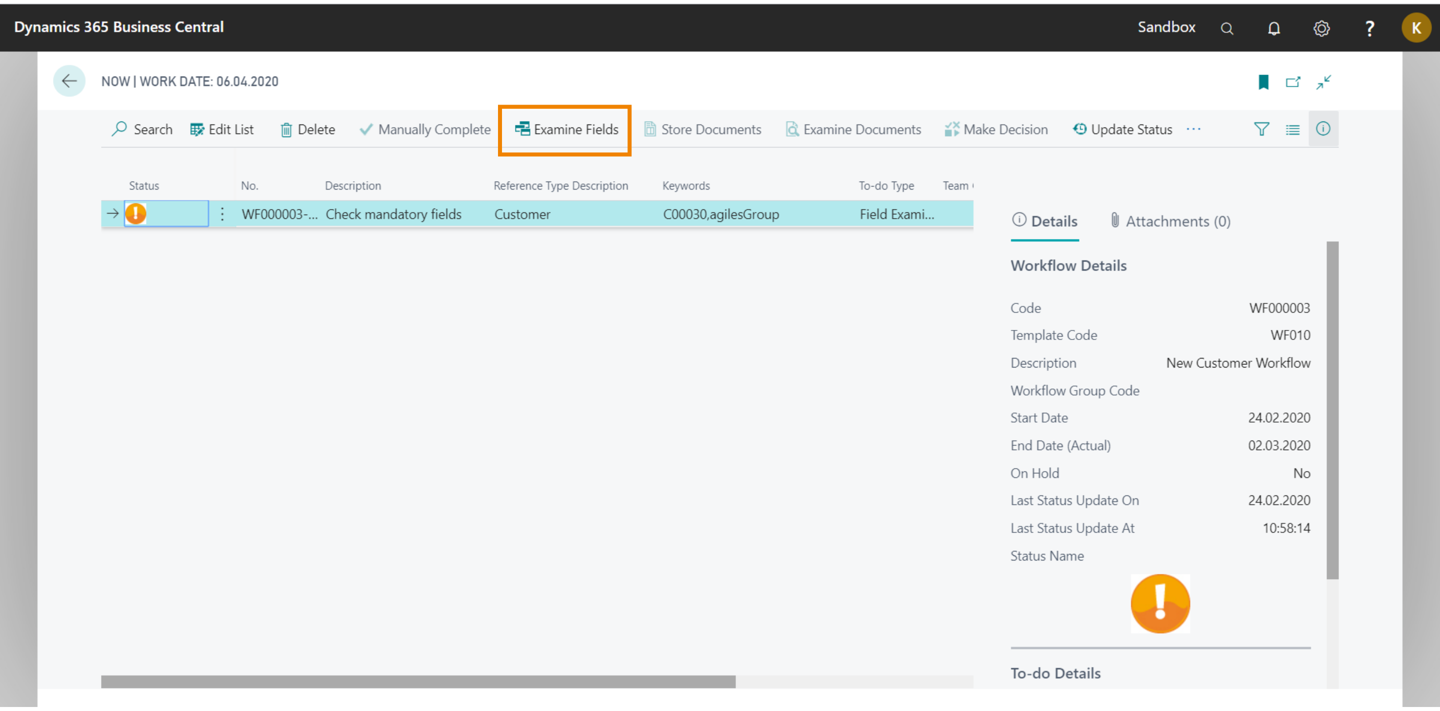
1) Close all pages and go back to the Role Center
2) **To Dos:**

   Click on Activity Now



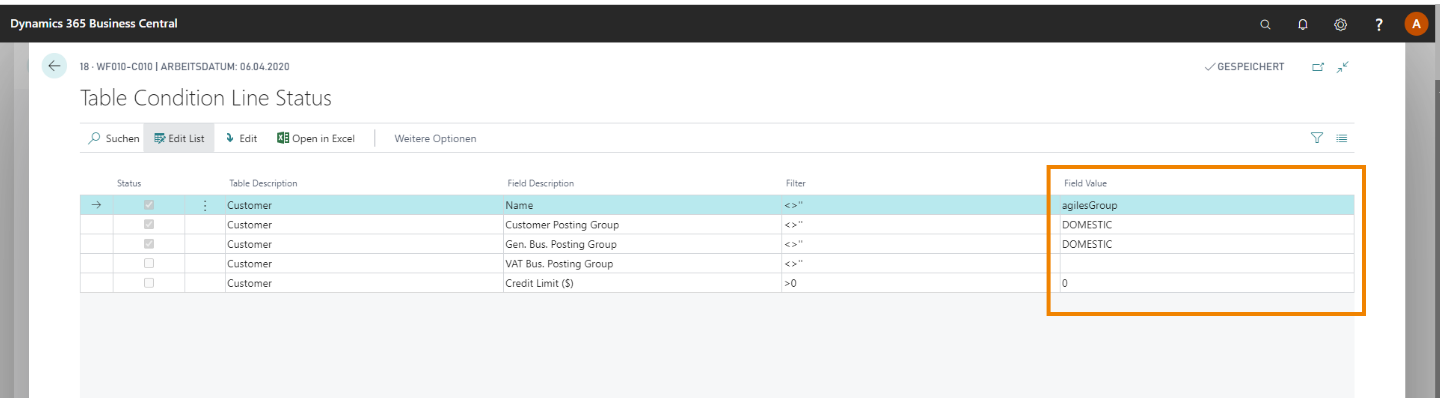
User Perspective Scenario 1

1) Click on Examine Fields



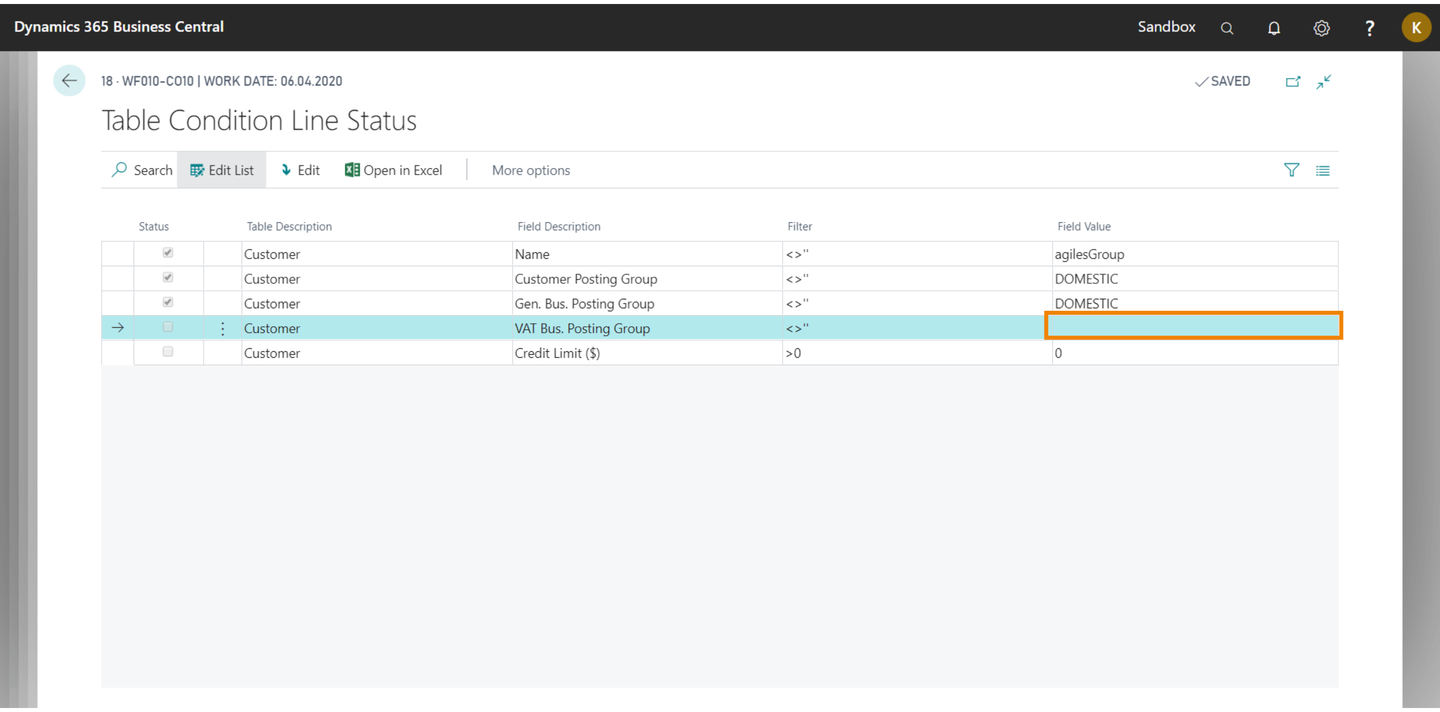
User Perspective Scenario 1

1) Add a new Column → Field Value



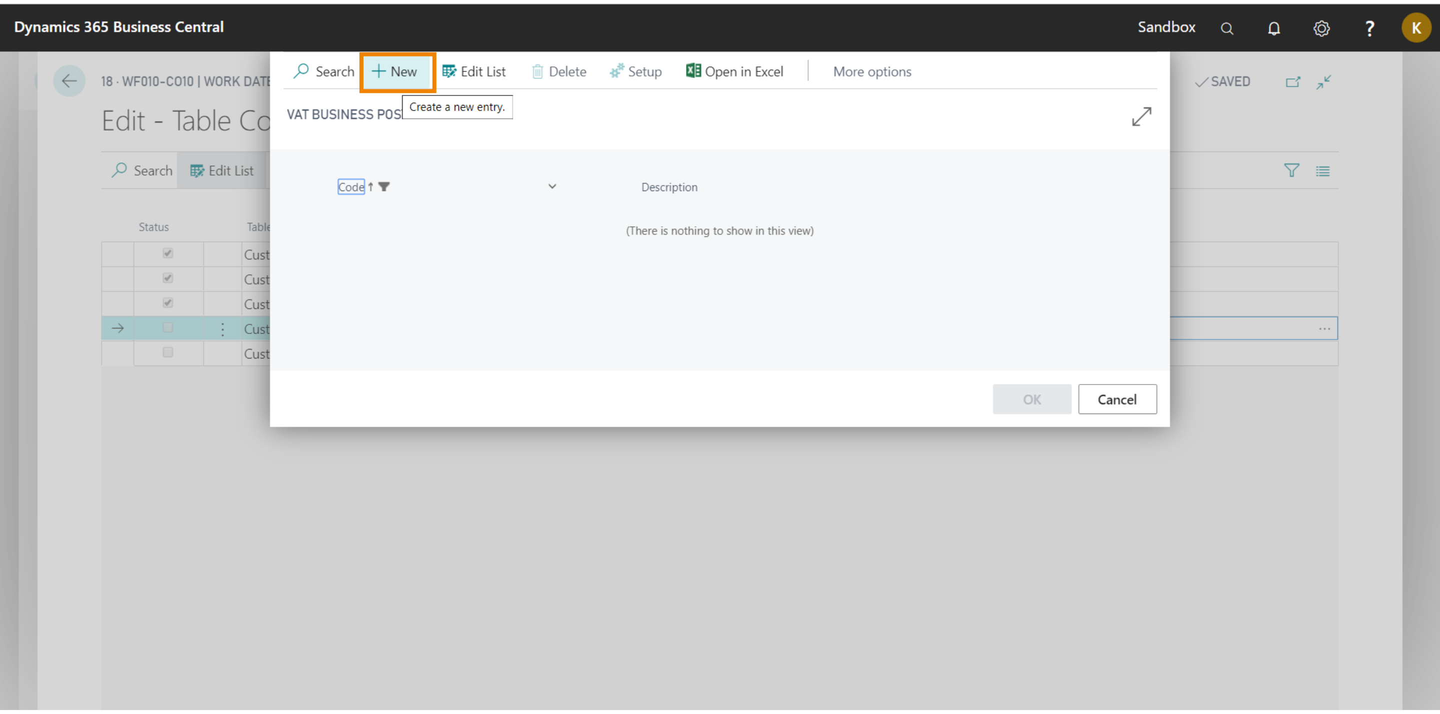
User Perspective Scenario 1

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



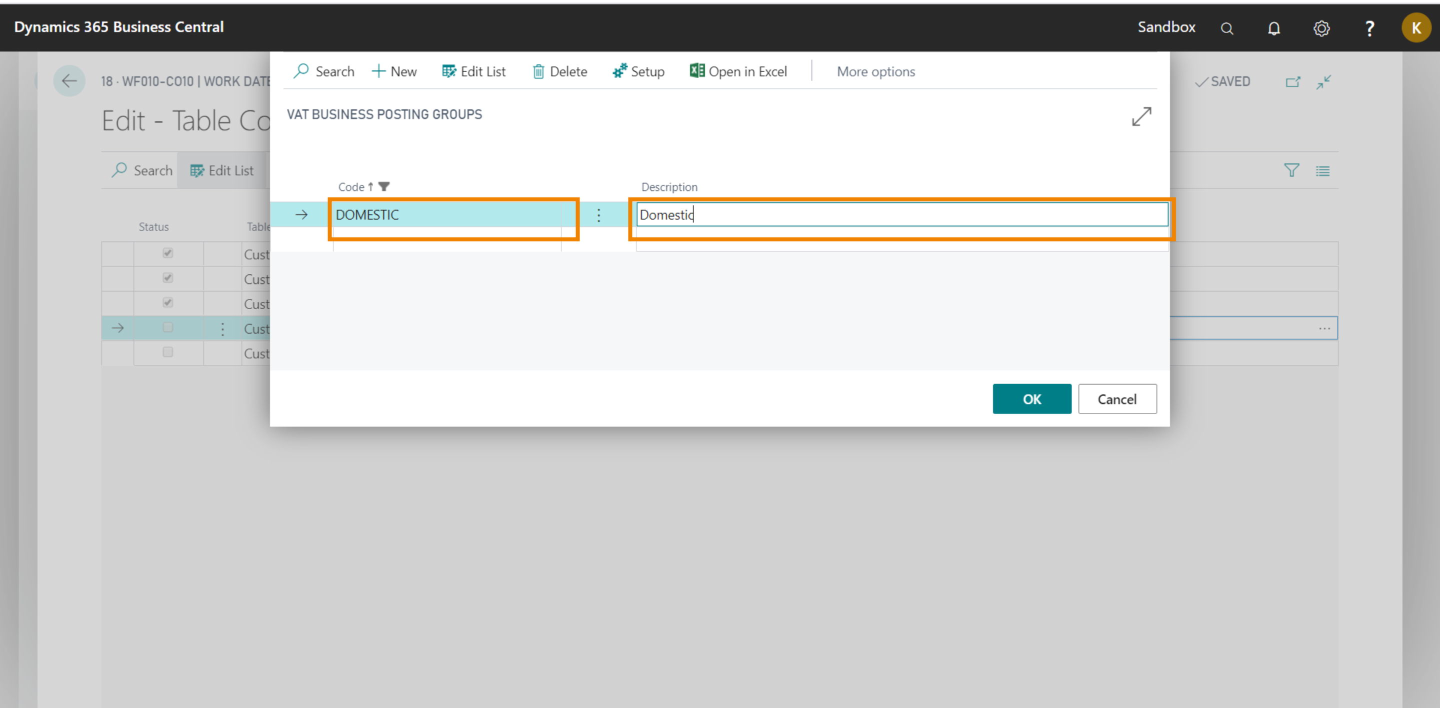
User Perspective Scenario 1

1) Click on +New



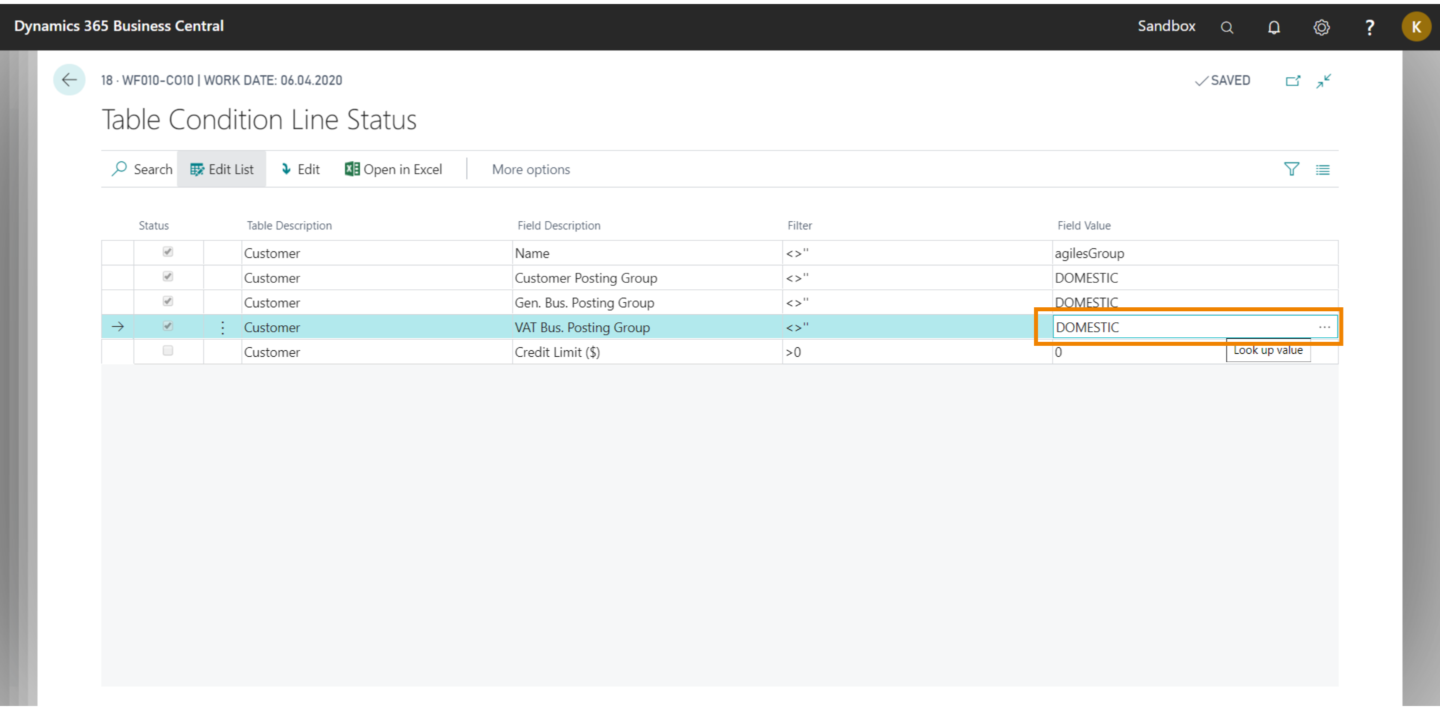
User Perspective Scenario 1

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



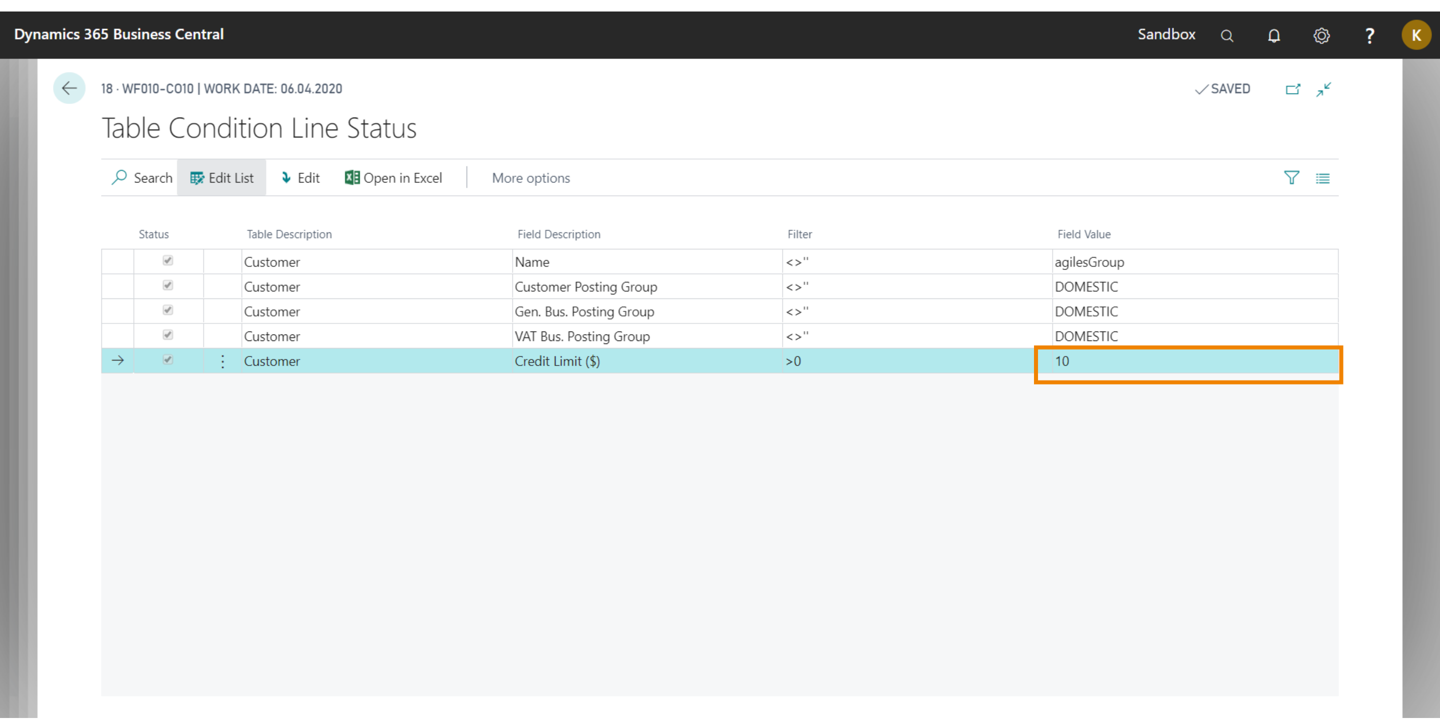
User Perspective Scenario 1

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



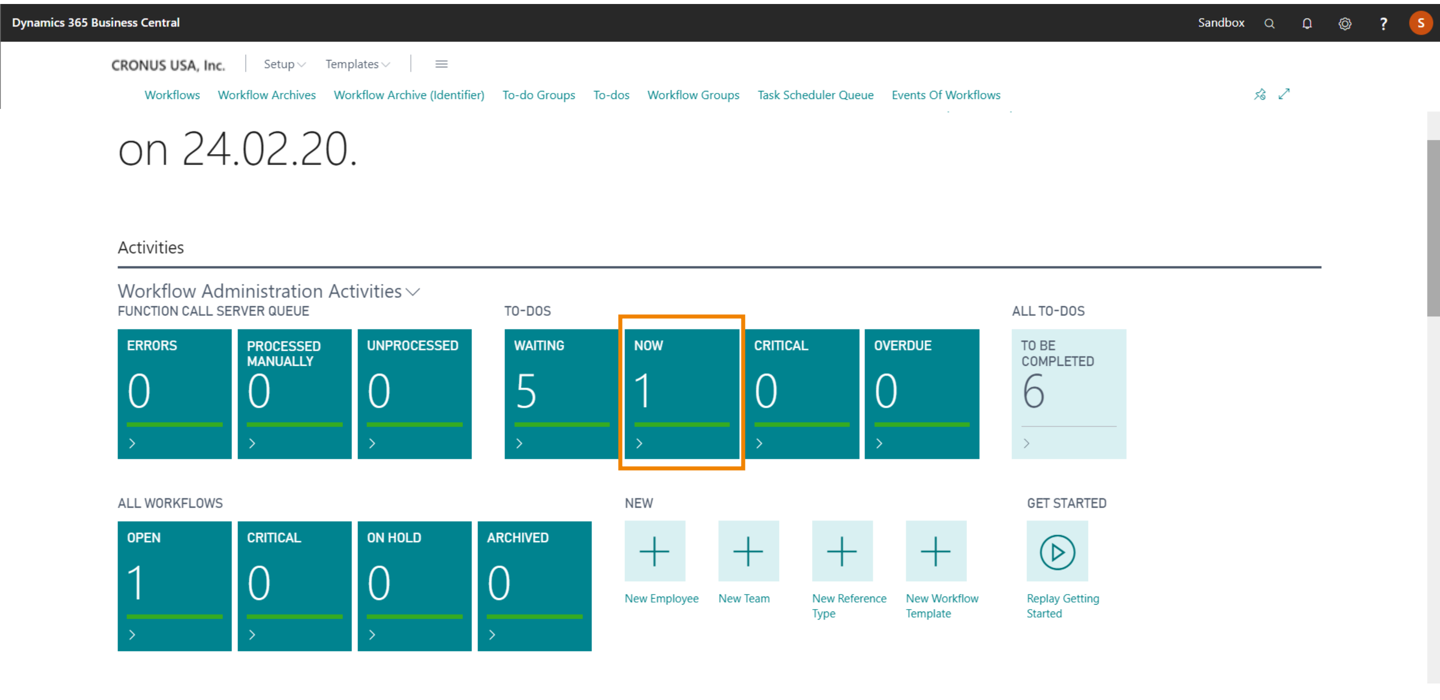
User Perspective Scenario 1

1) **Fifth line:** Enter Field Value → 10



User Perspective Scenario 1

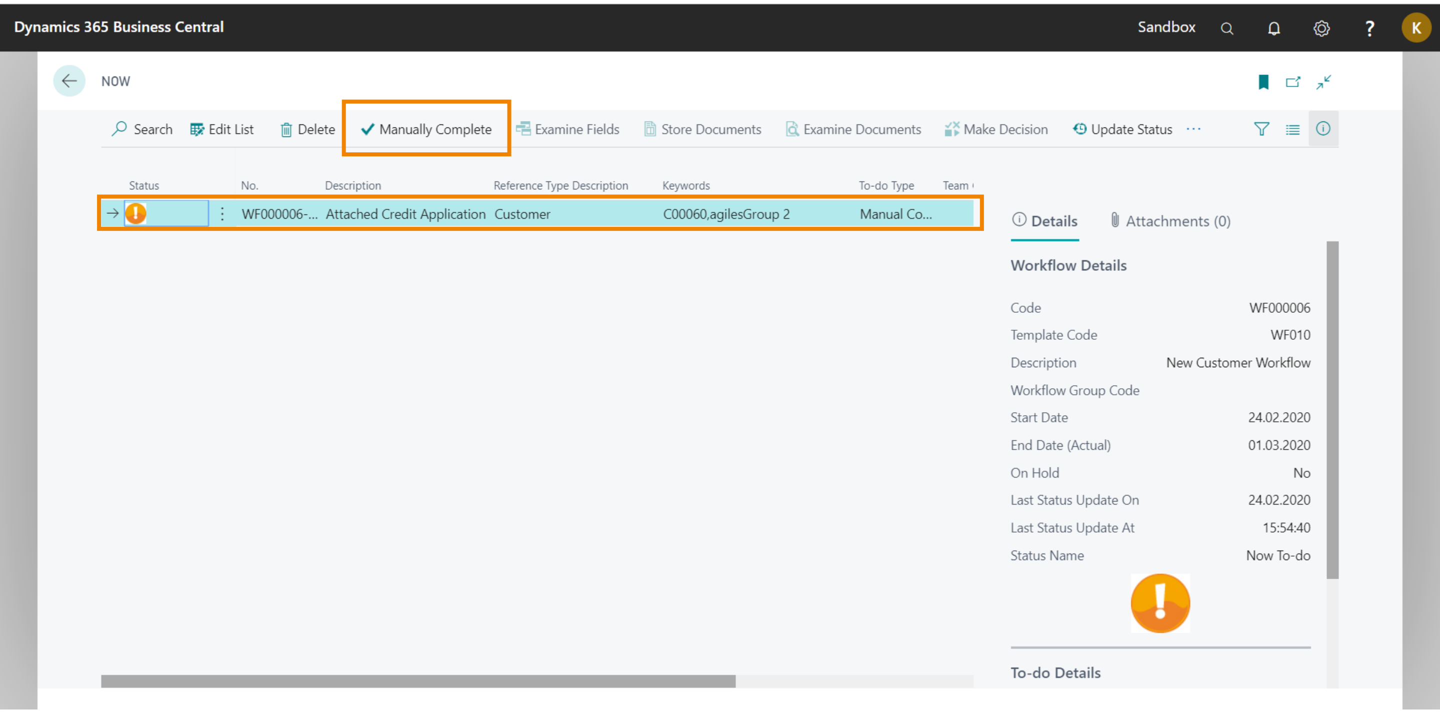
1) Close all pages and go back to the Role Center
2) **To-Dos:** Click on the Activity Now



User Perspective Scenario 1

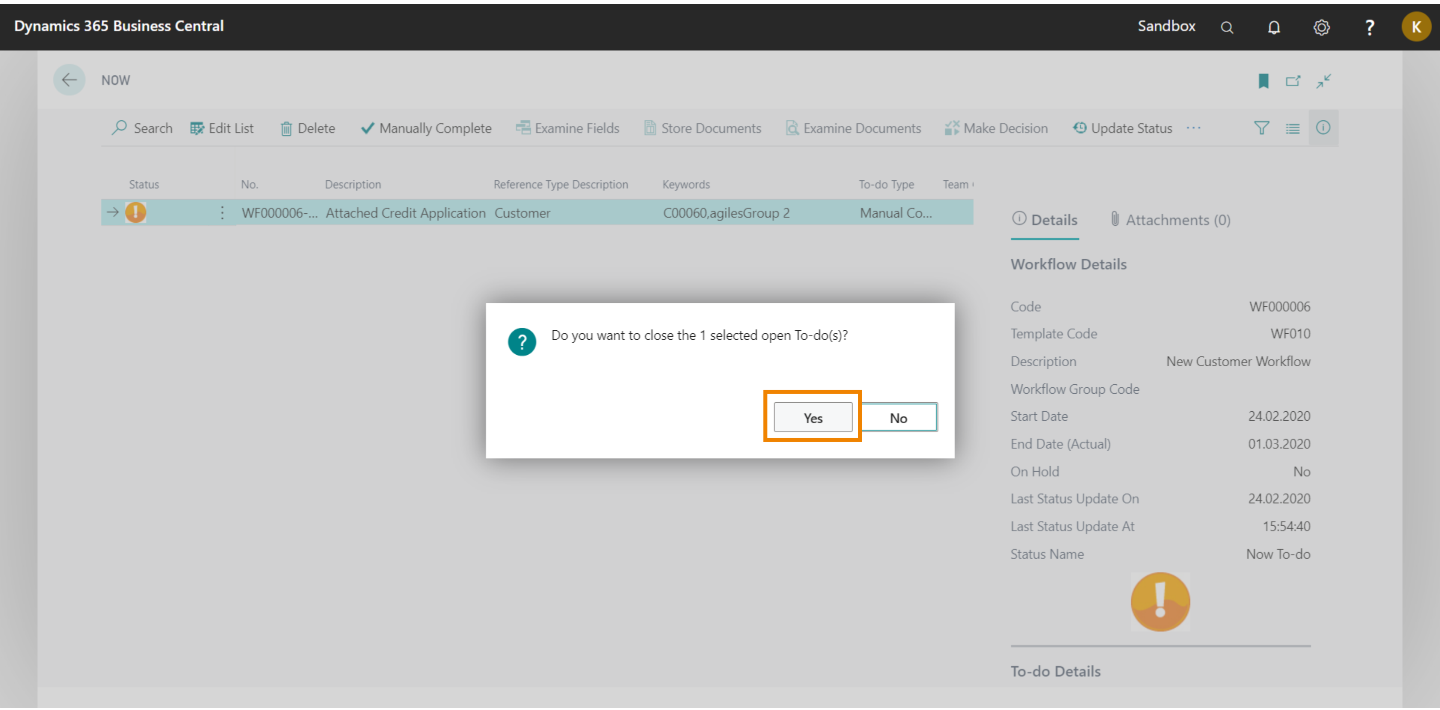
To close the To-do:

1) Select WF000003-T002
2) Click Manually Complete



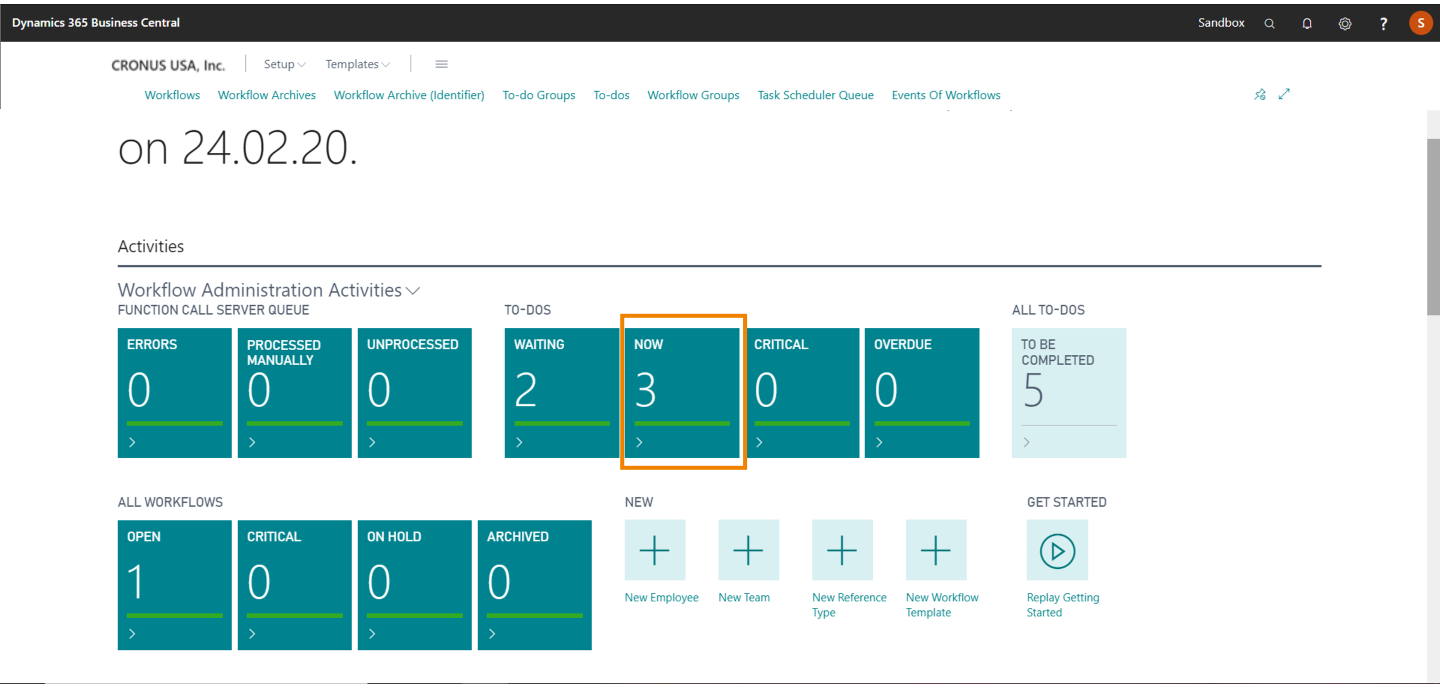
User Perspective Scenario 1

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



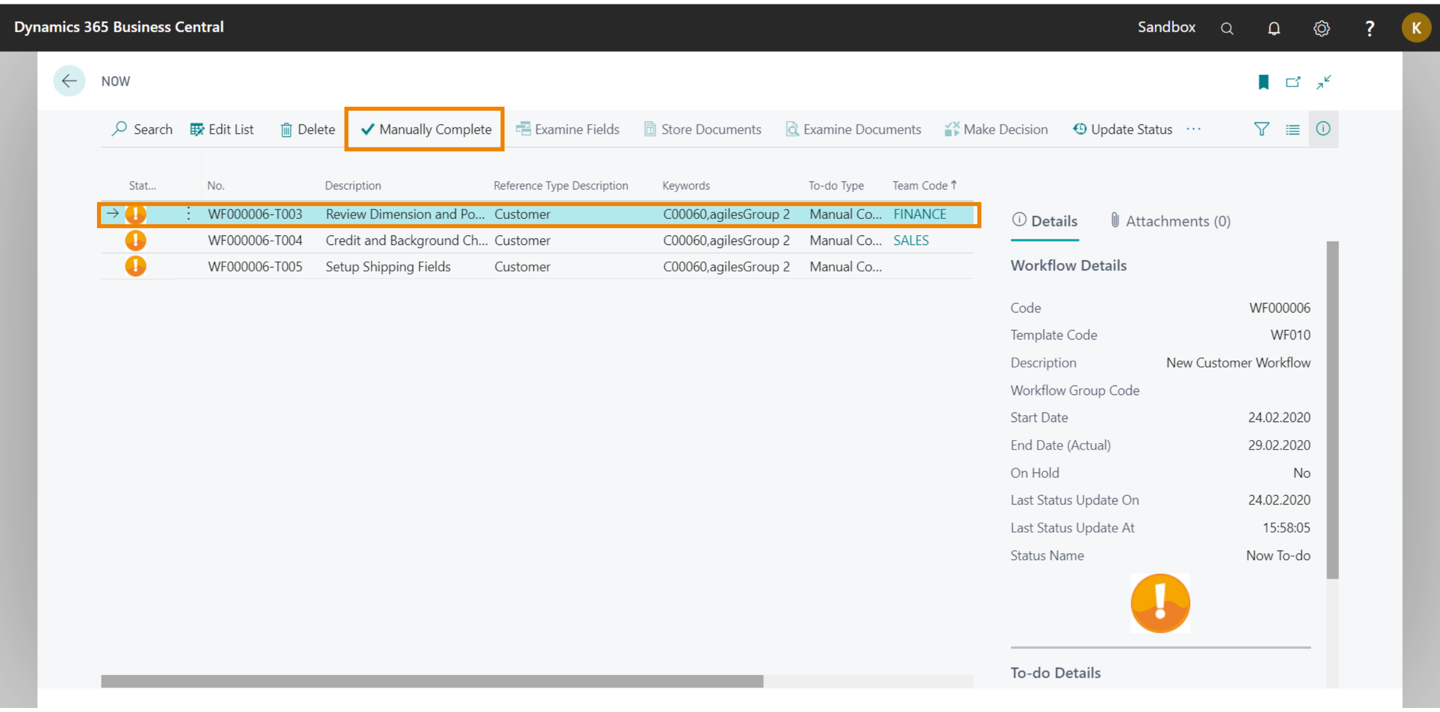
User Perspective Scenario 1

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



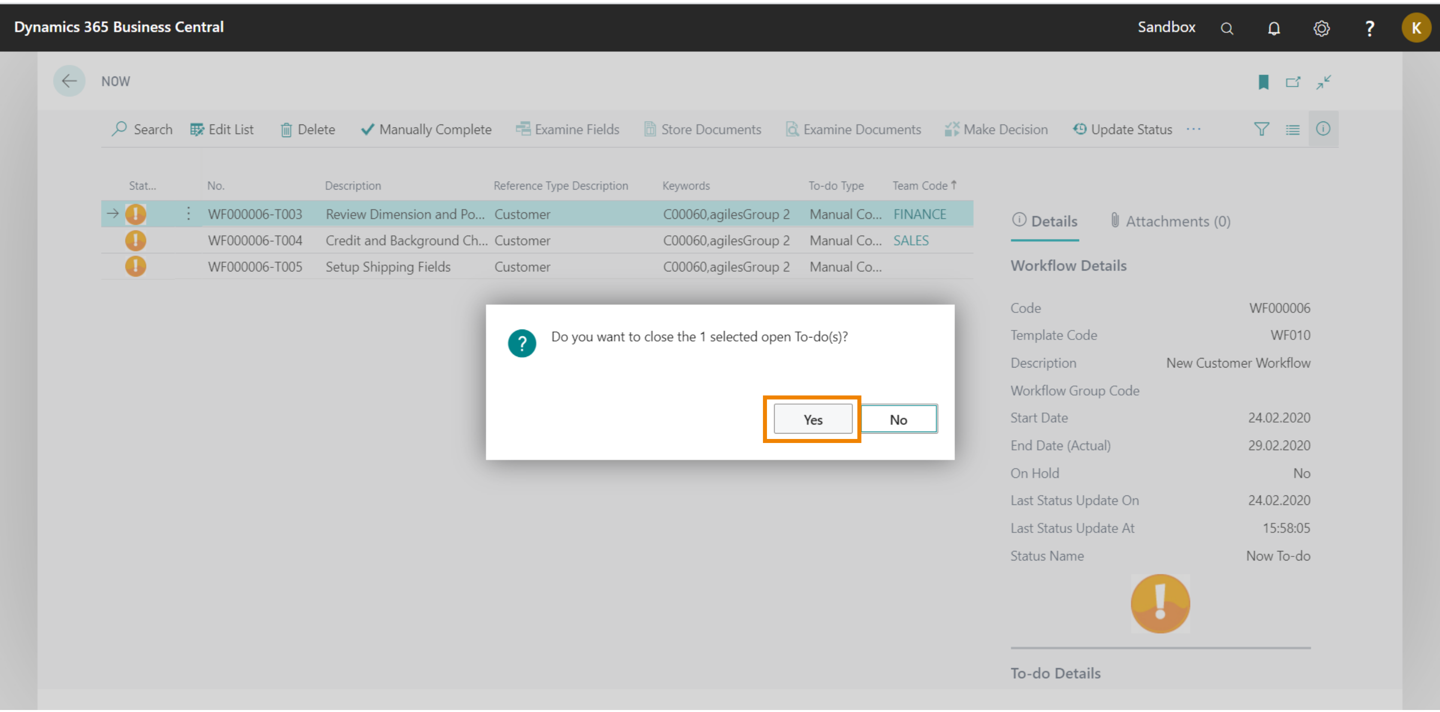
User Perspective Scenario 1

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



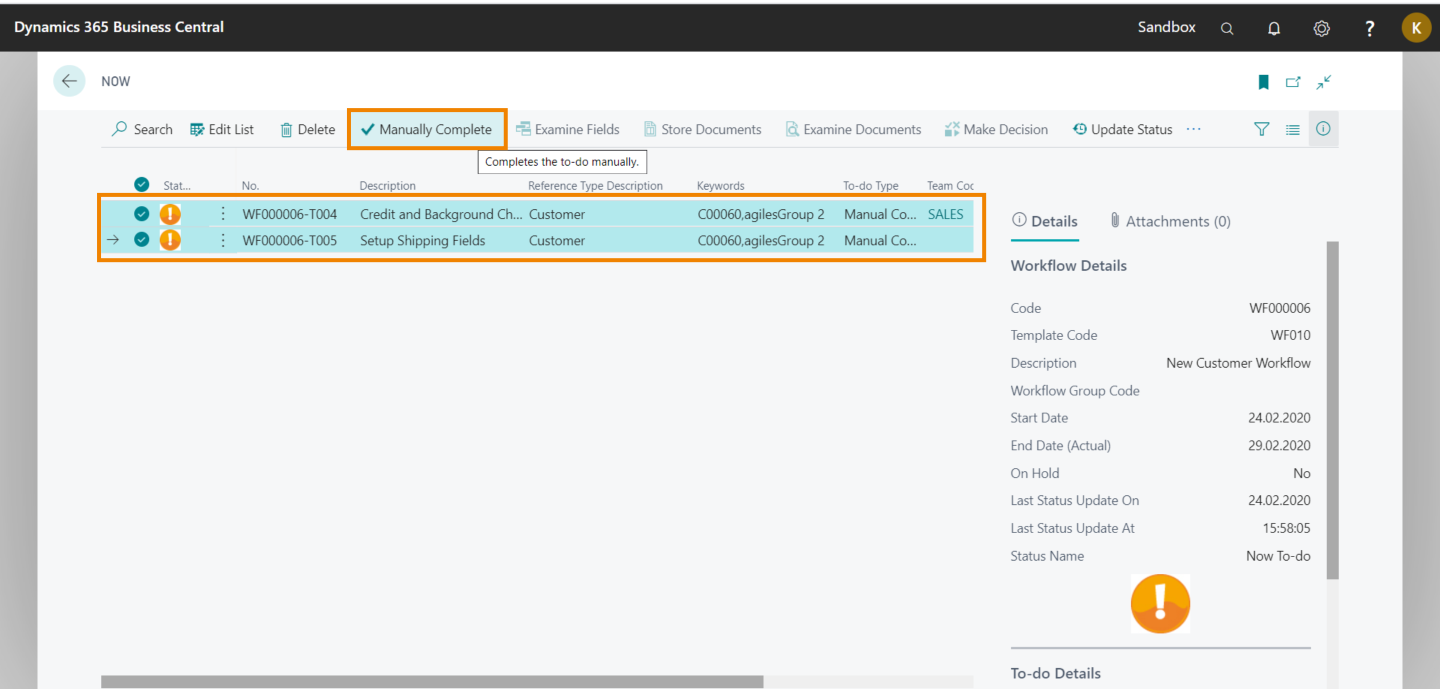
User Perspective Scenario 1

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



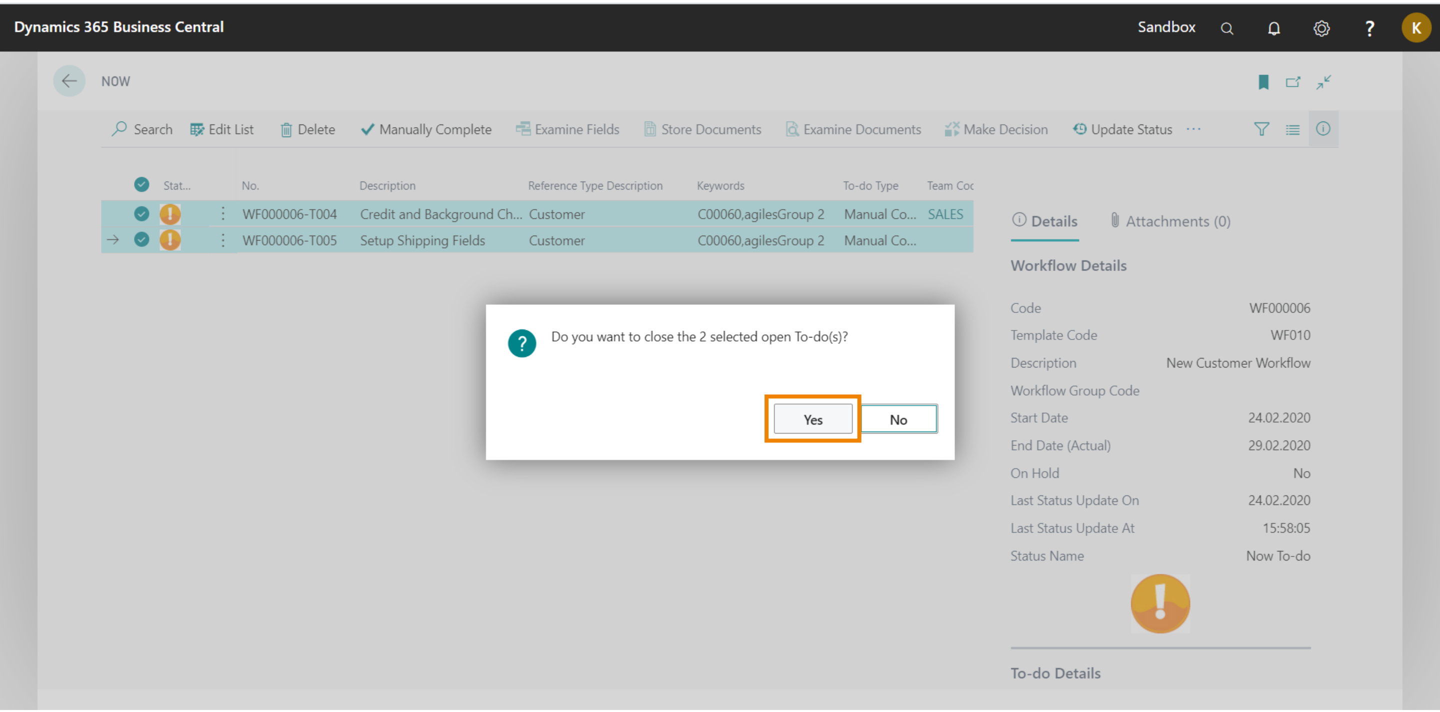
User Perspective Scenario 1

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



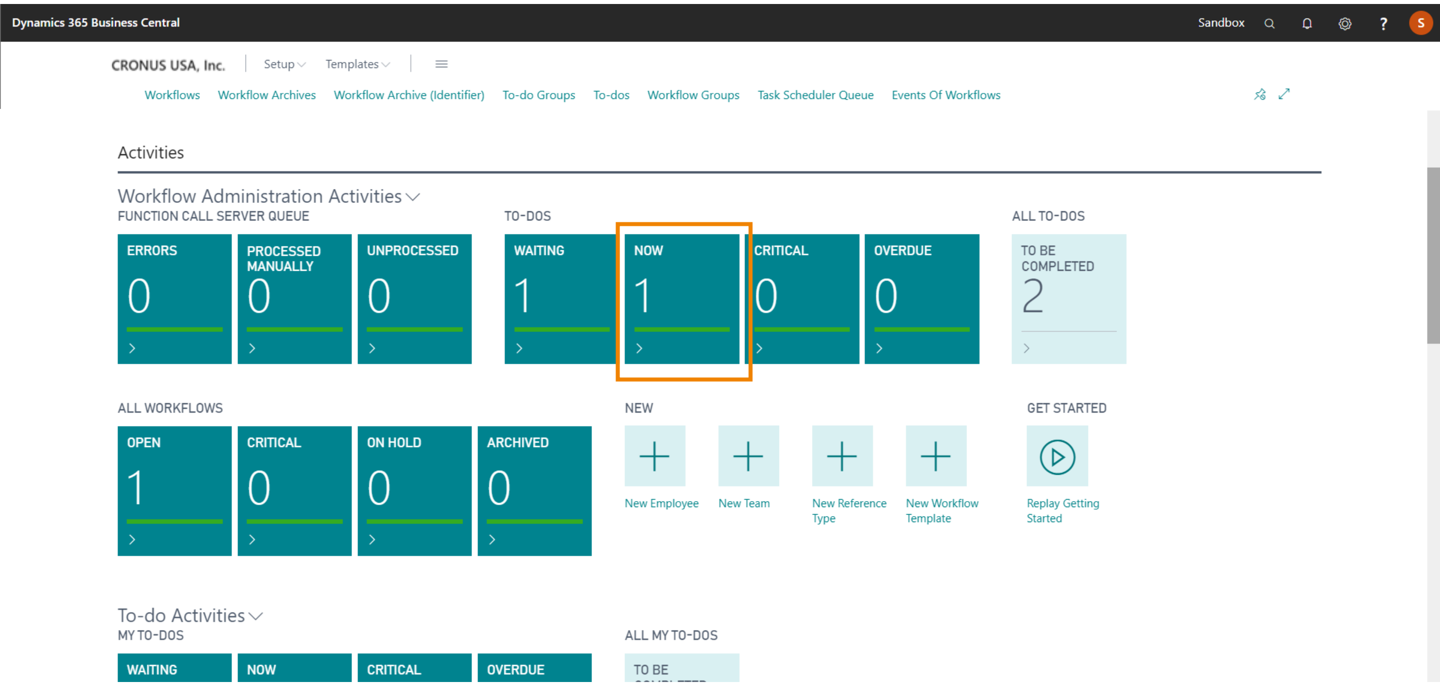
User Perspective Scenario 1

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



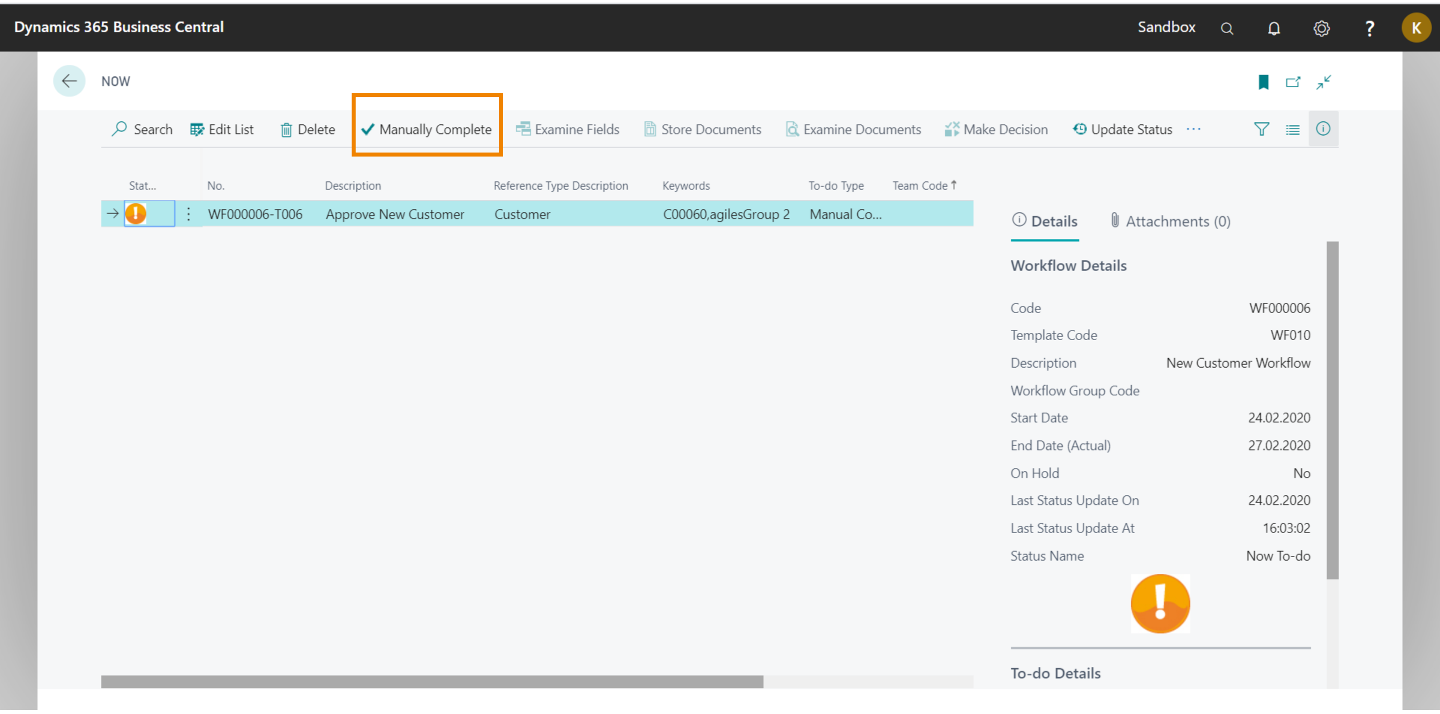
User Perspective Scenario 1

1) To-Dos: Click on Activity Now



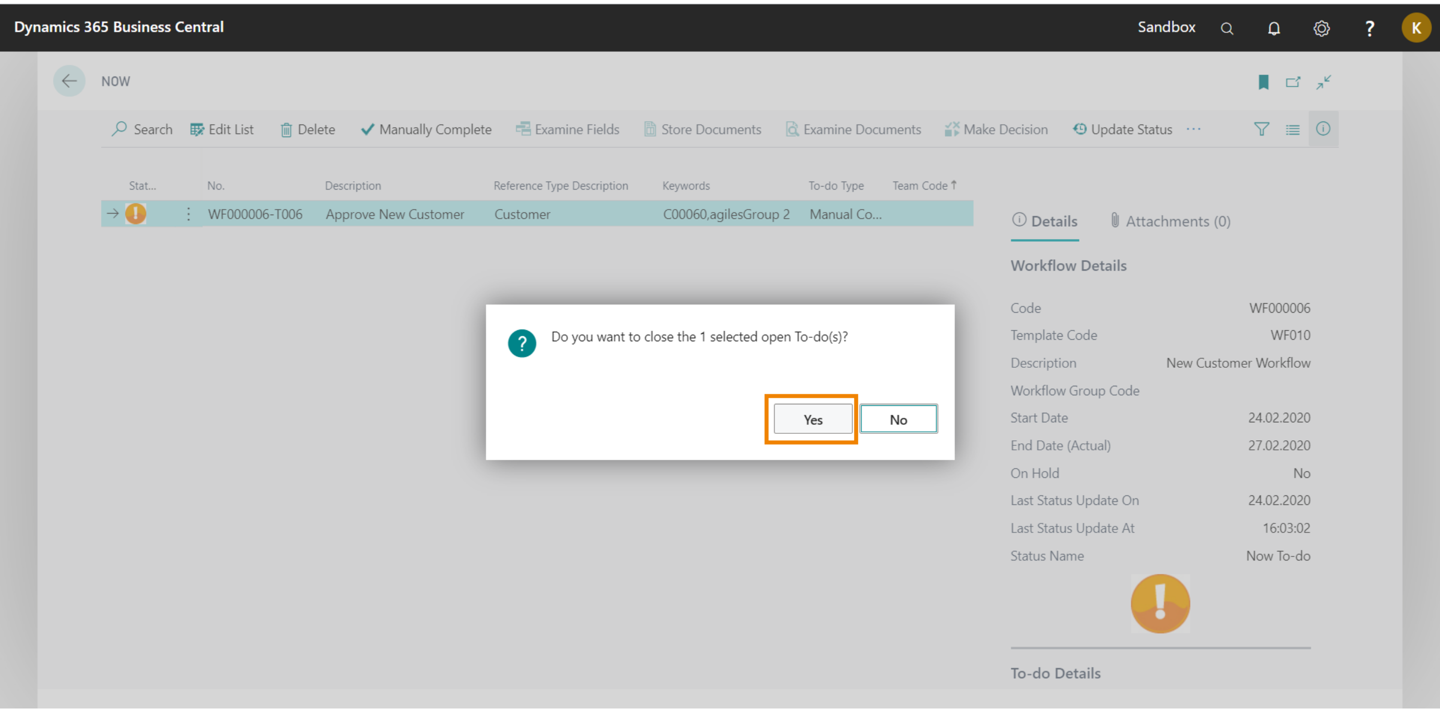
User Perspective Scenario 1

1) Click on Manually Complete



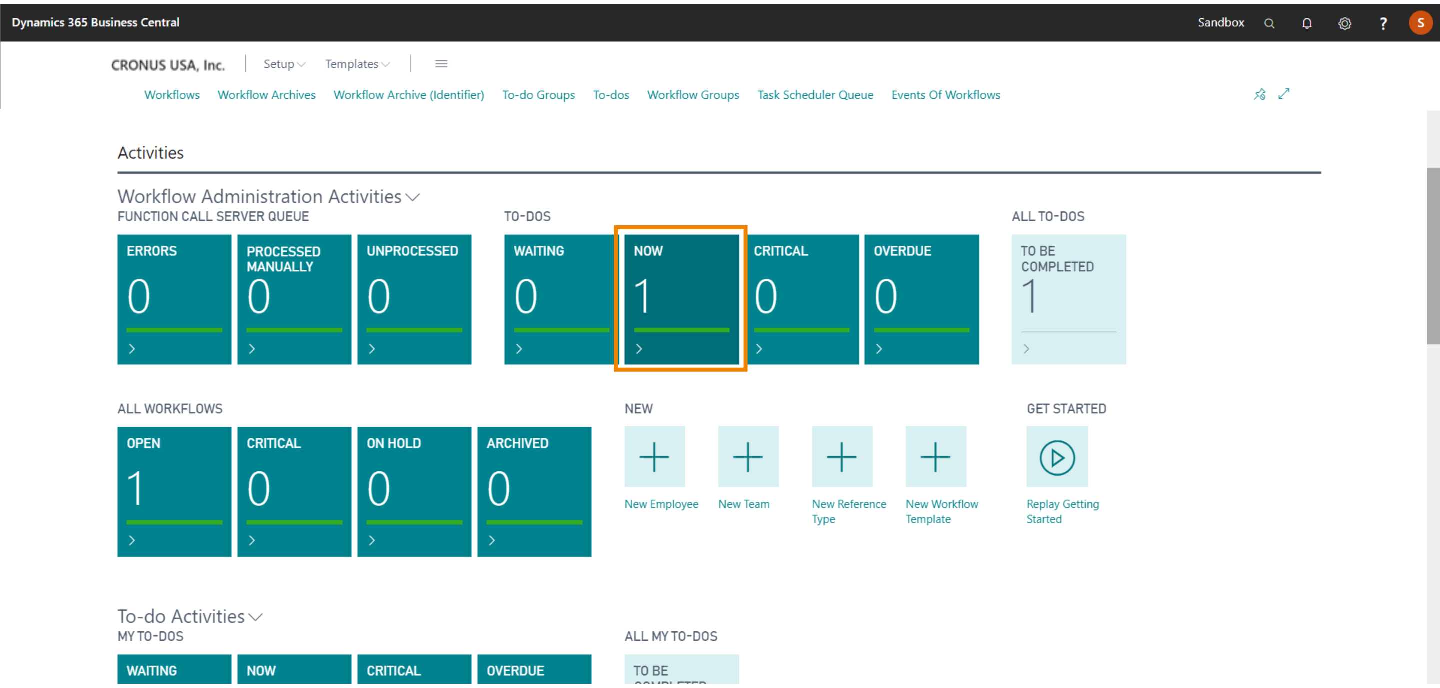
User Perspective Scenario 1

1) Click Yes
2) Go back to Role Center



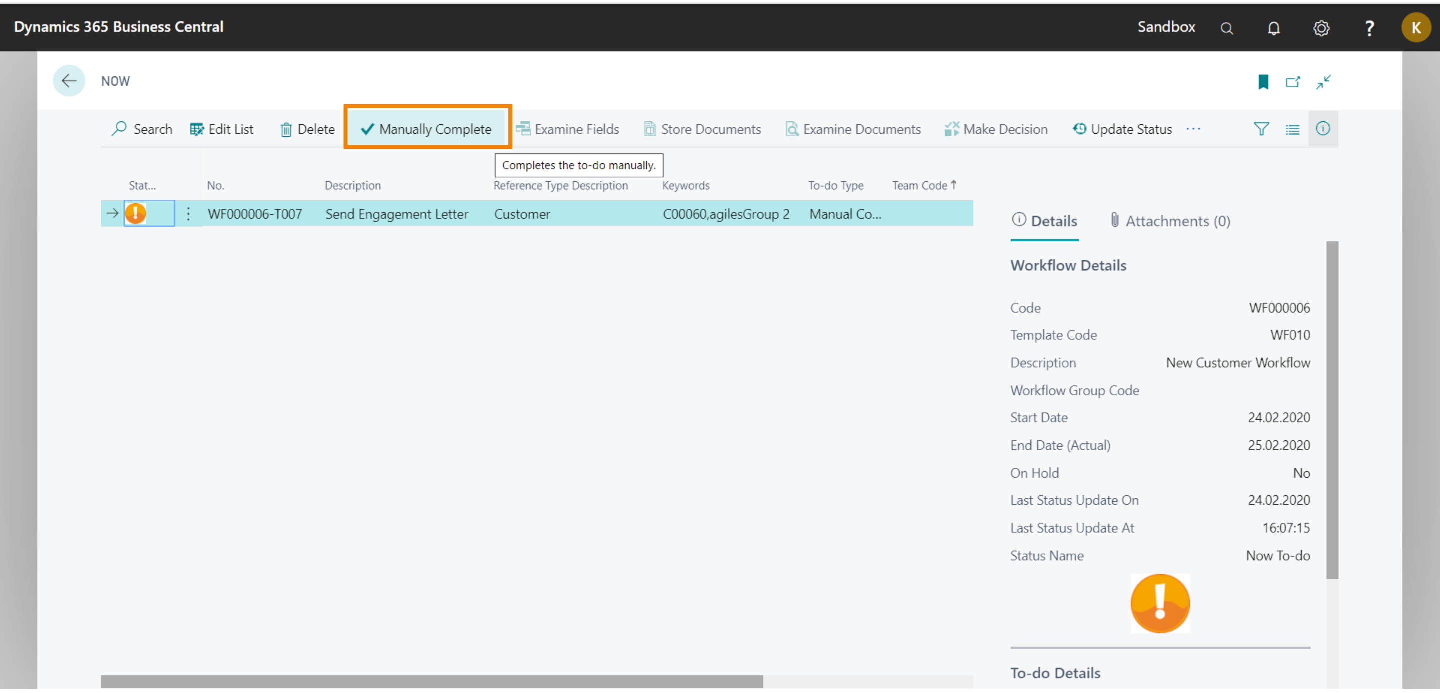
User Perspective Scenario 1

1) To-Dos: Click on Activity Now



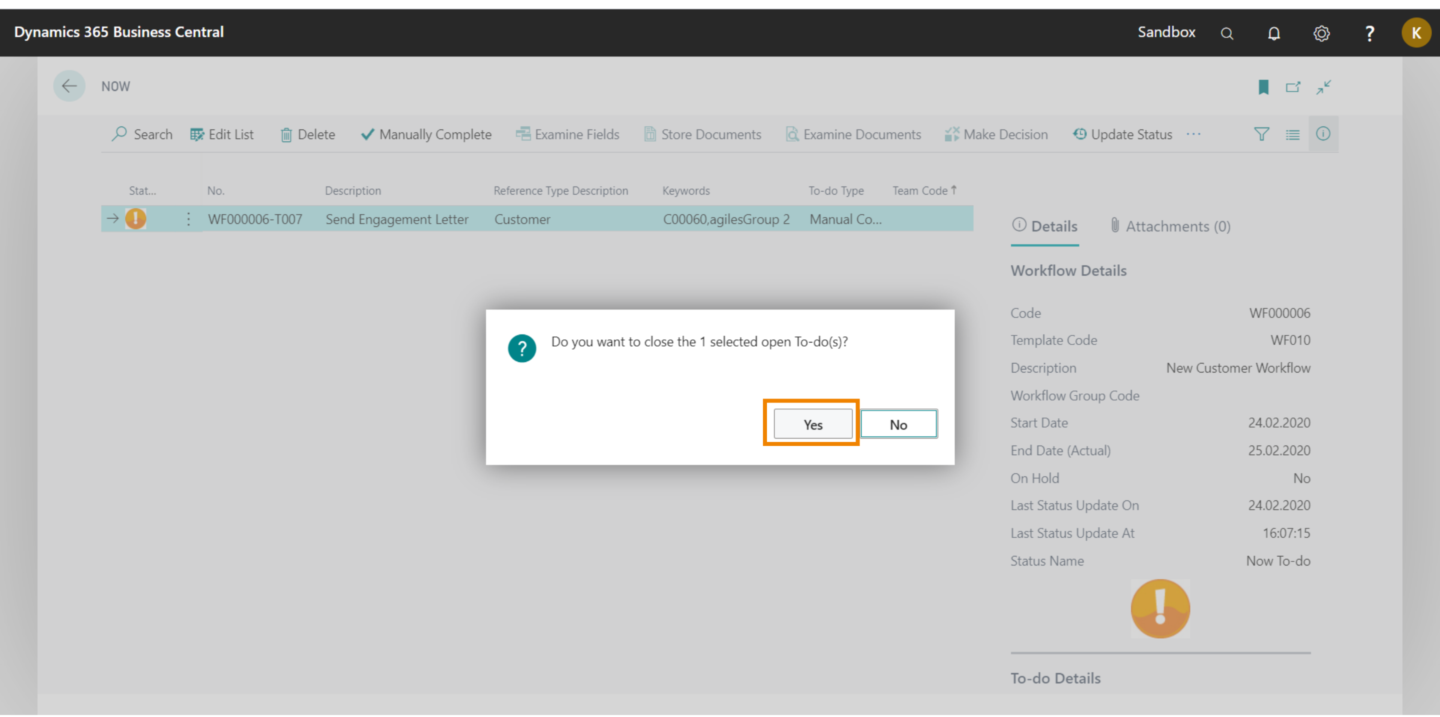
User Perspective Scenario 1

1) Click on Manually Complete



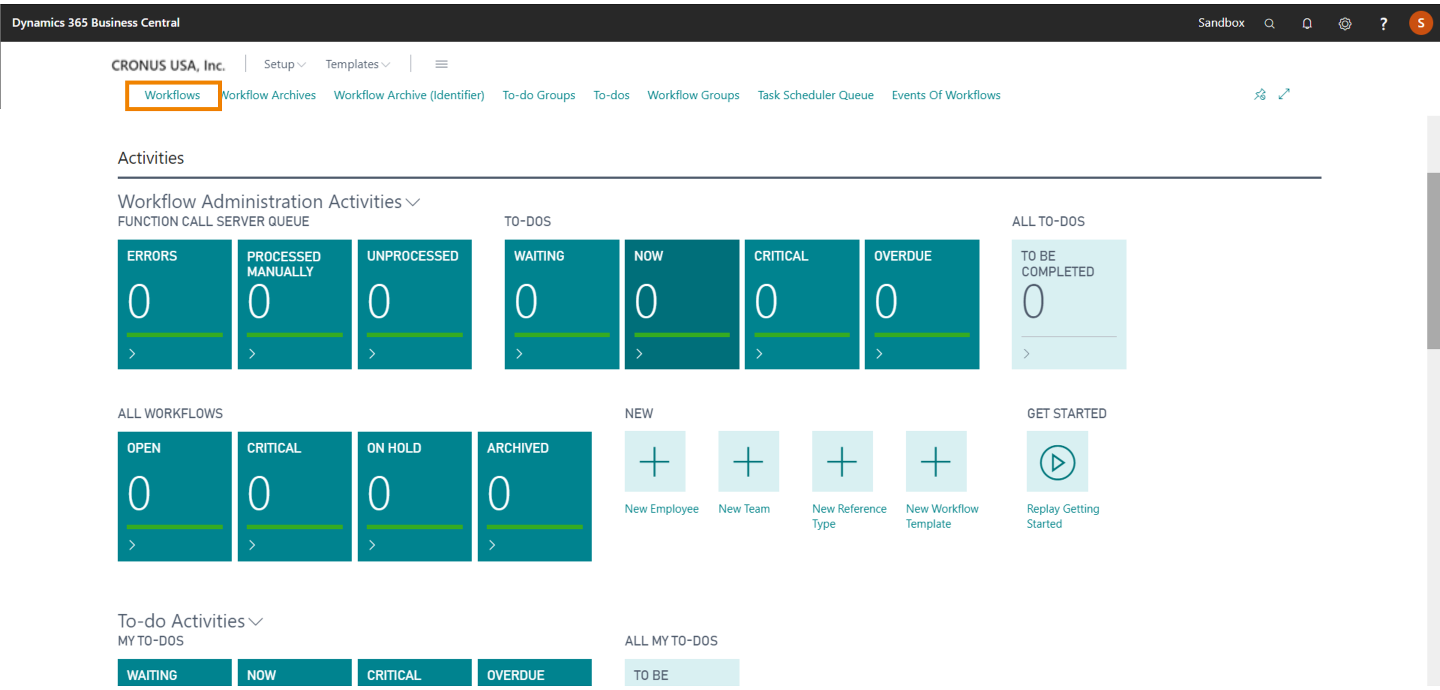
User Perspective Scenario 1

1) Click Yes



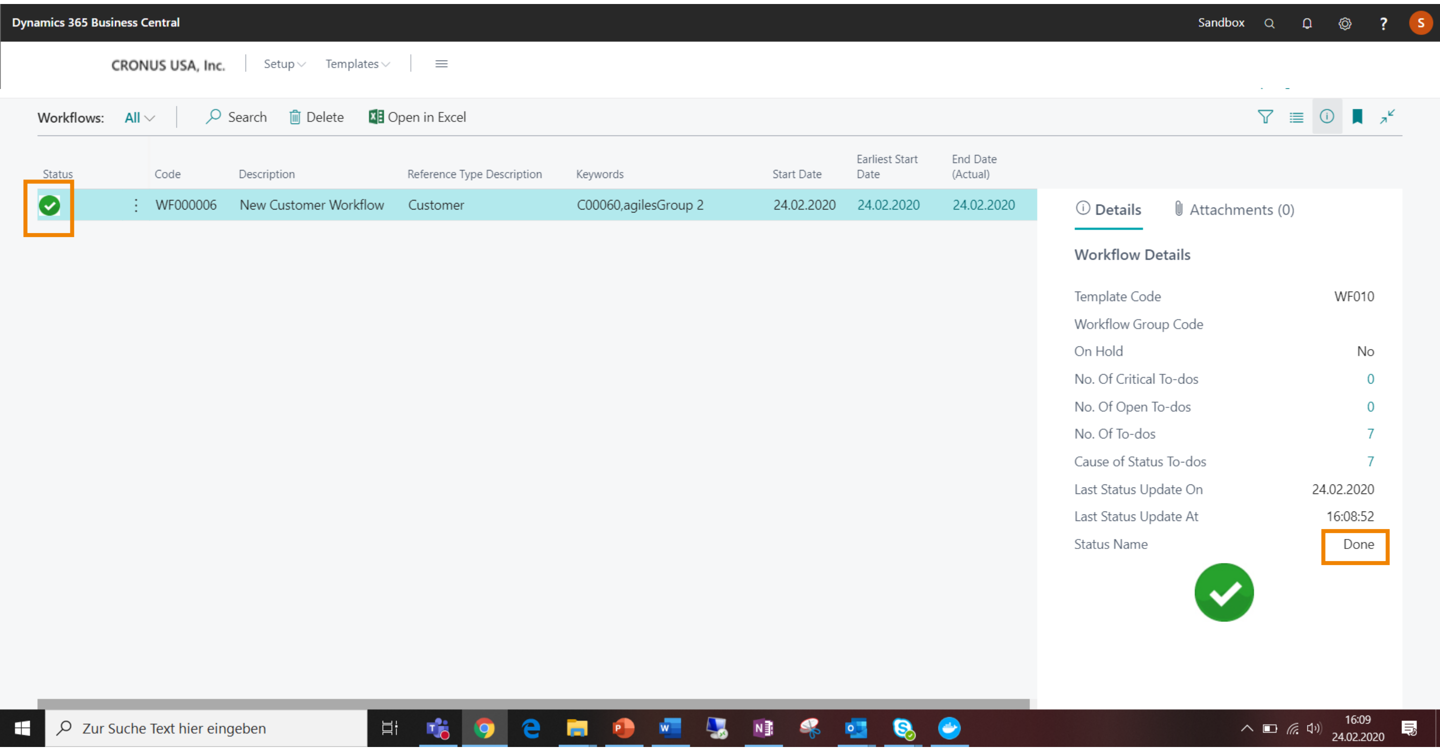
User Perspective Scenario 1

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



User Perspective Scenario 1

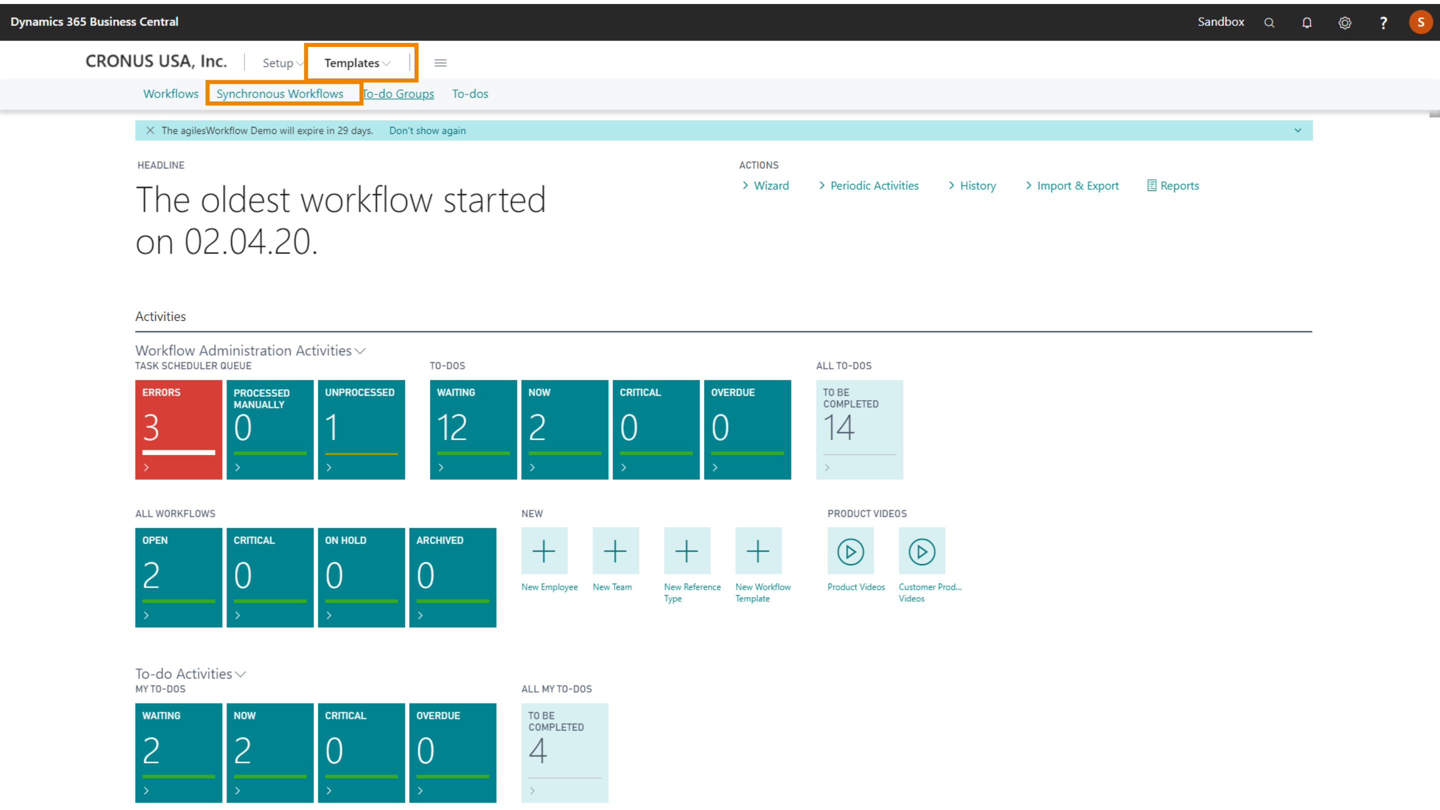
1) Workflow is done



Scenario 2
Stop Posting

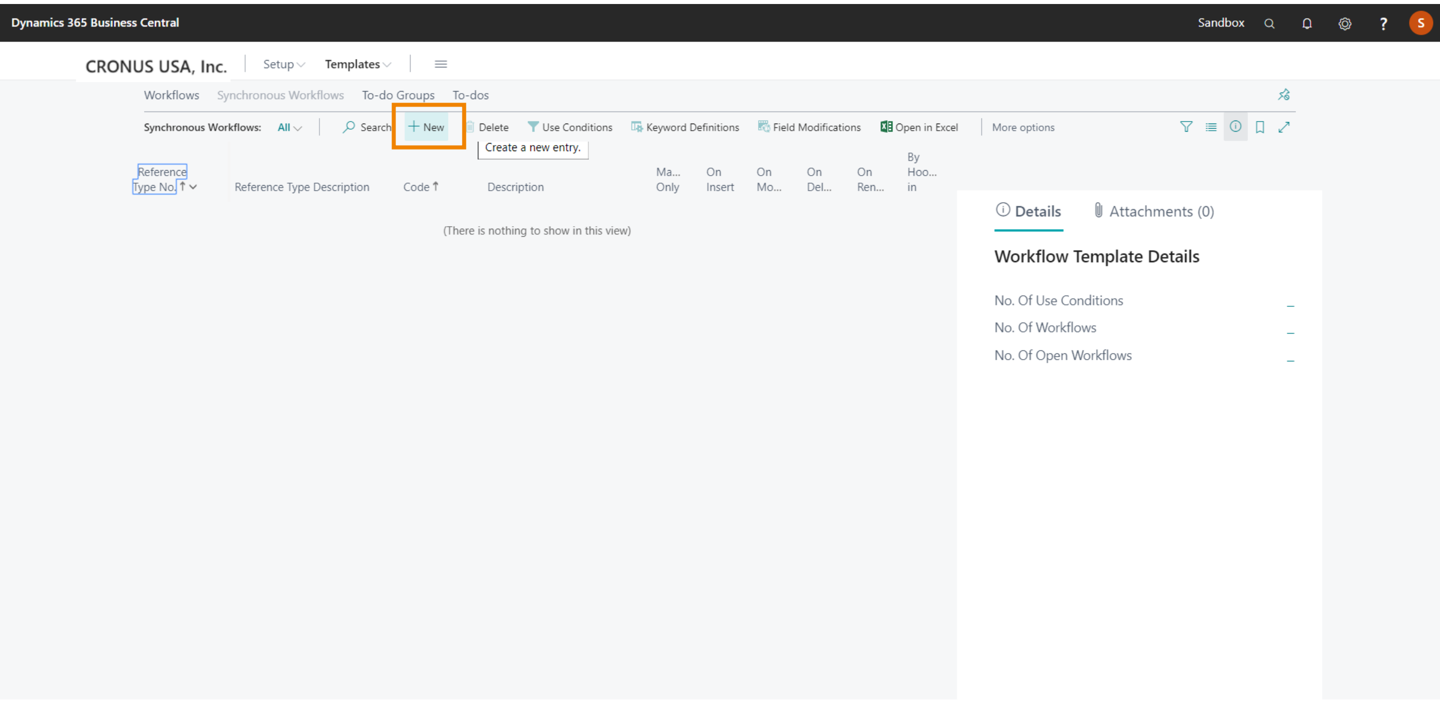
Scenario 2: Stop Posting – Synchronous Workflow

1) Click on Templates
2) Click on Synchronous Workflow



Scenario 2: Stop Posting – Workflow Template

1) Click on +New



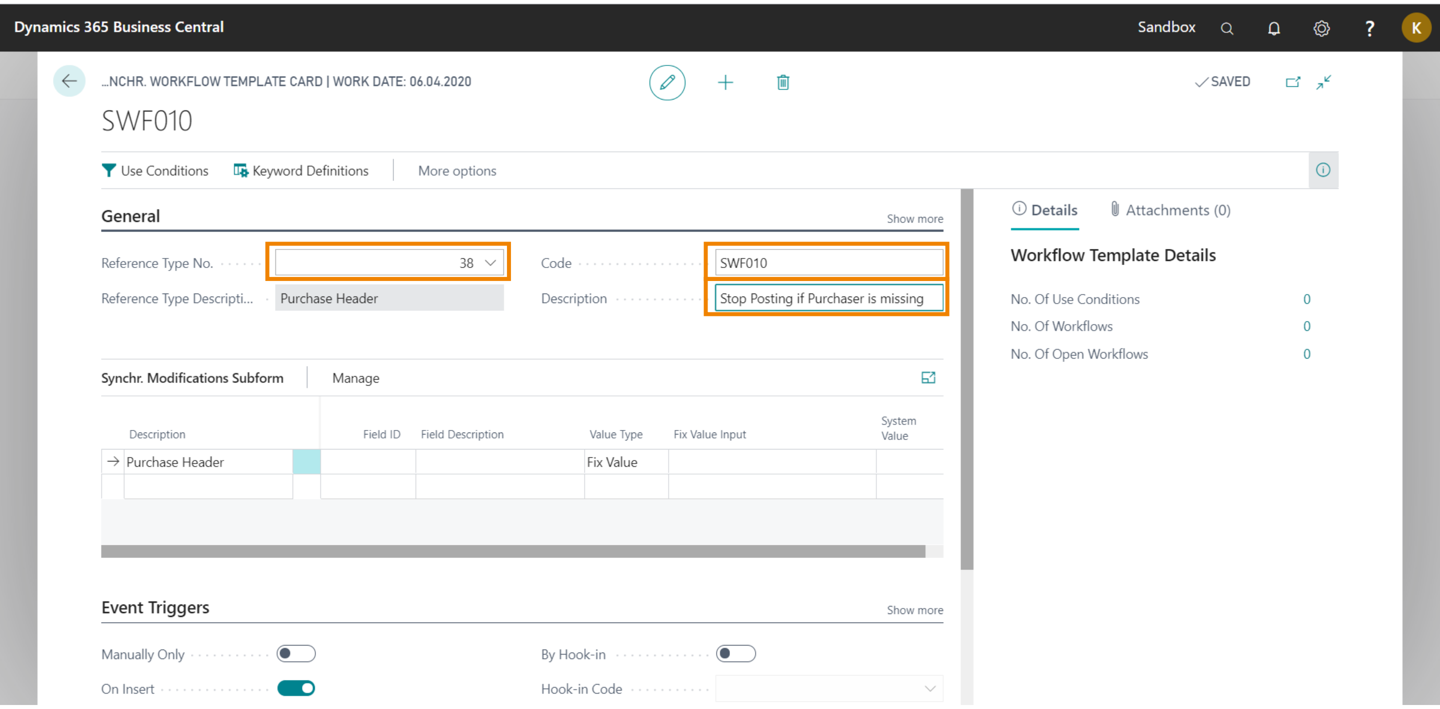
Scenario 2: Stop Posting – Workflow Template

1) **General:**

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

Enter Code → SWF010

Enter Description → Stop Posting if Purchaser is missing



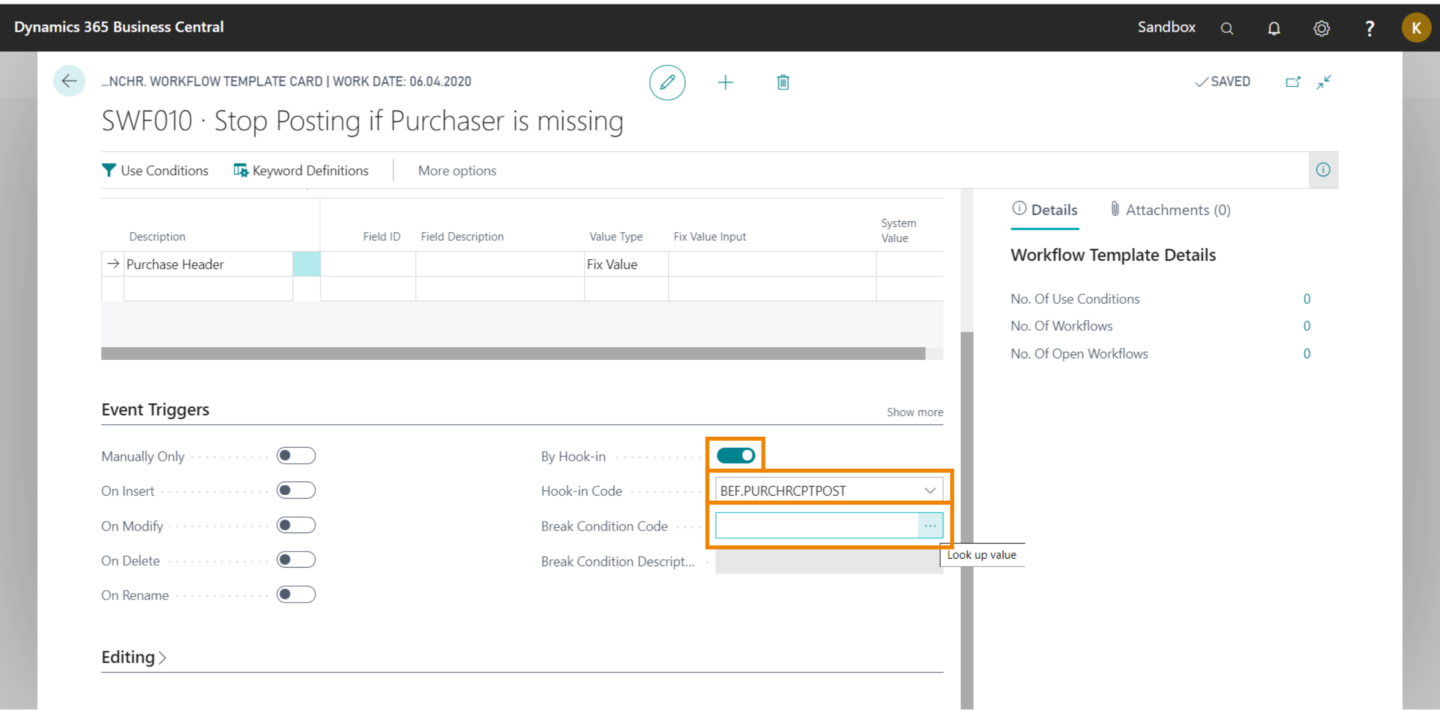
Scenario 2: Stop Posting – Workflow Template

1) Event Triggers:

Activate Hook-in

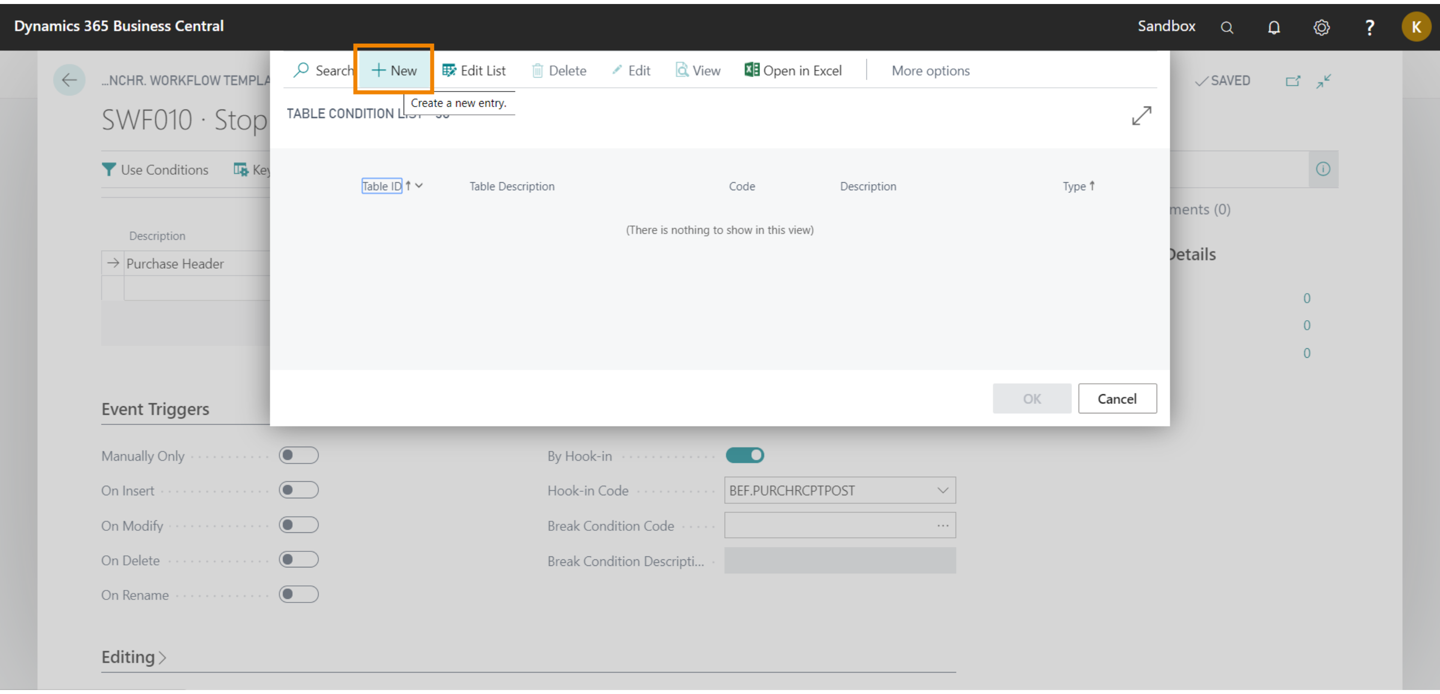
Use look up value in field Hook-in Code and select Before Purchase Receive Post

Use look up value in field Break Condition Code



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:**

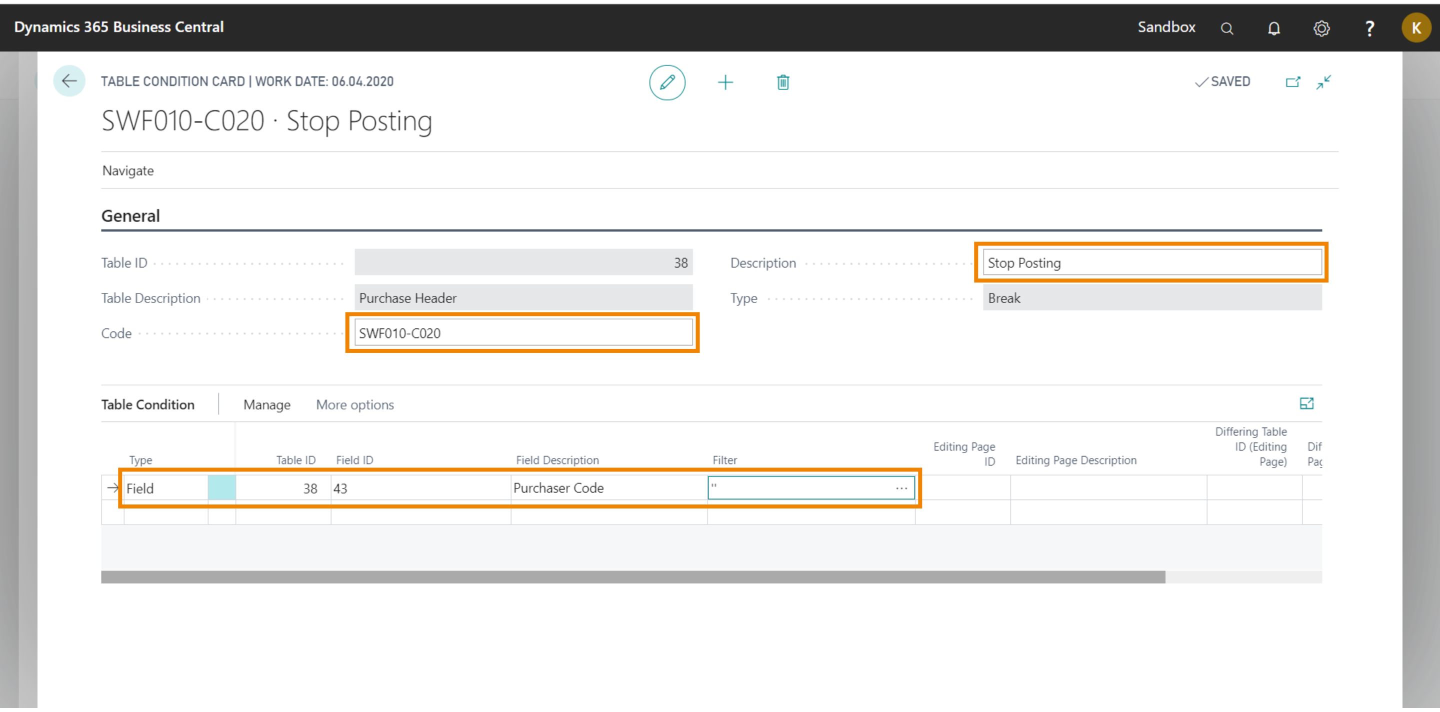
   Enter Type → Field

   Enter Table ID →38

   Enter Field ID → 43

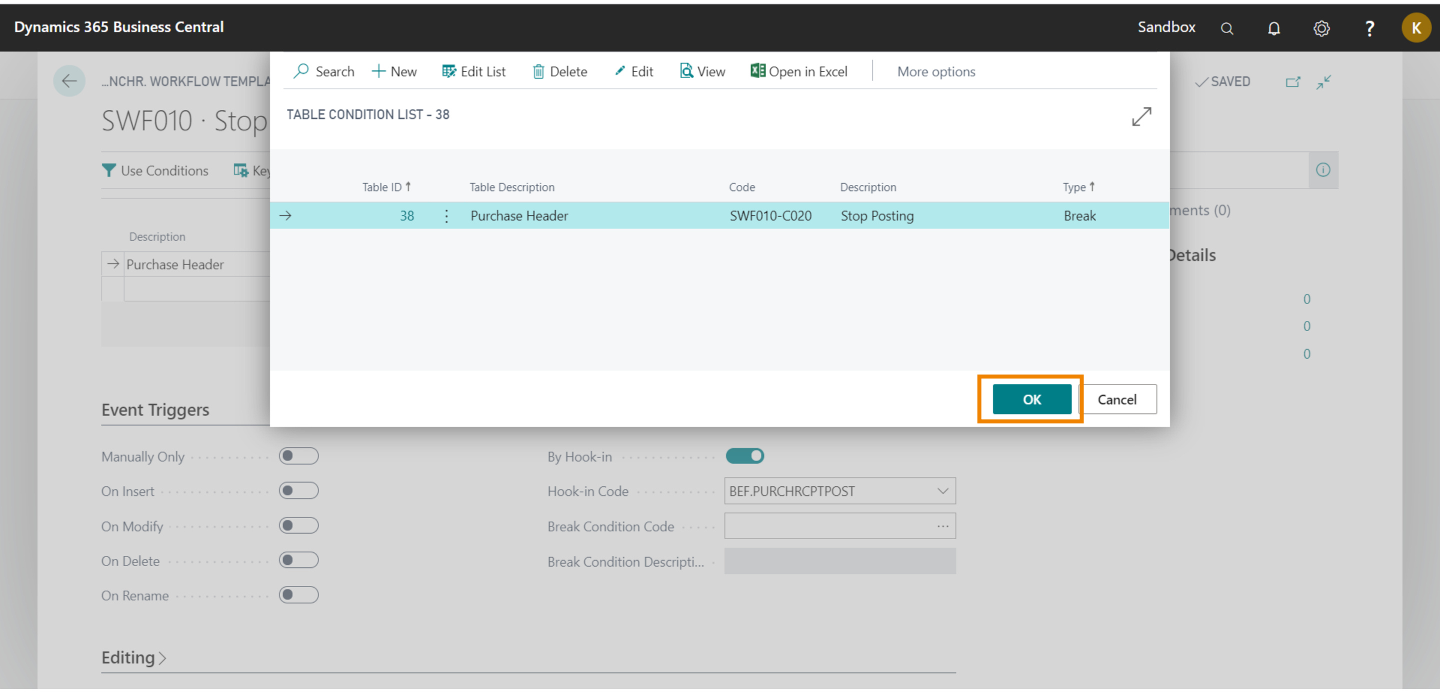
   Enter Filter → “

3) Go back one page



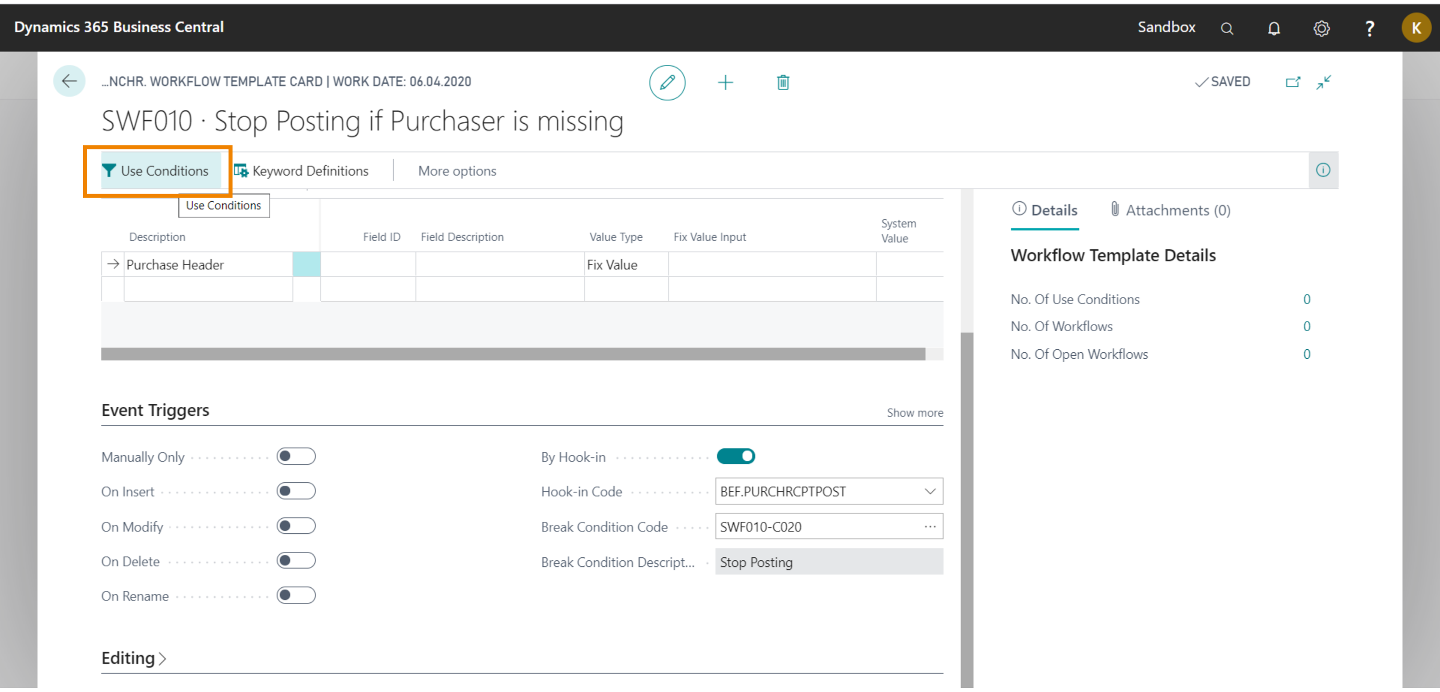
Scenario 2: Stop Posting – Table Condition

1) Click on Ok



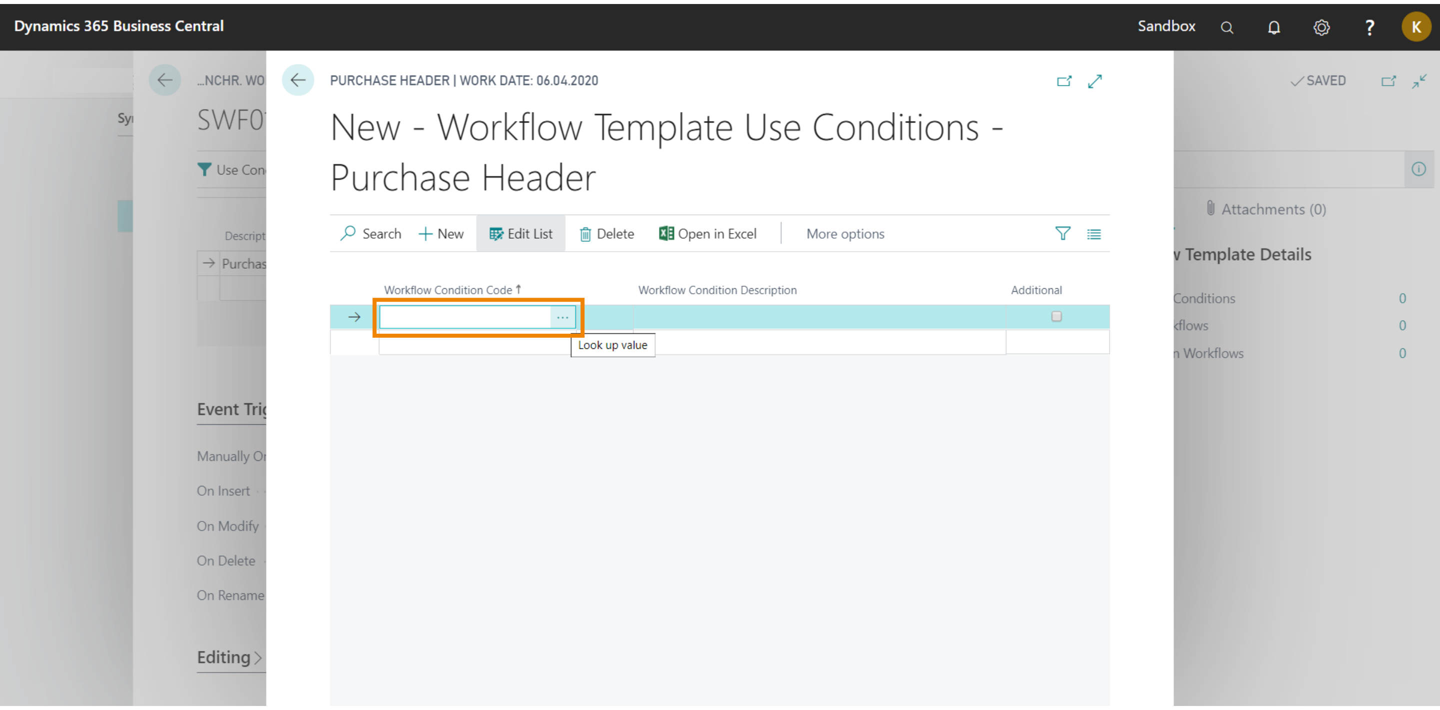
Scenario 2: Stop Posting – Table Condition

1) Click on Use Conditions



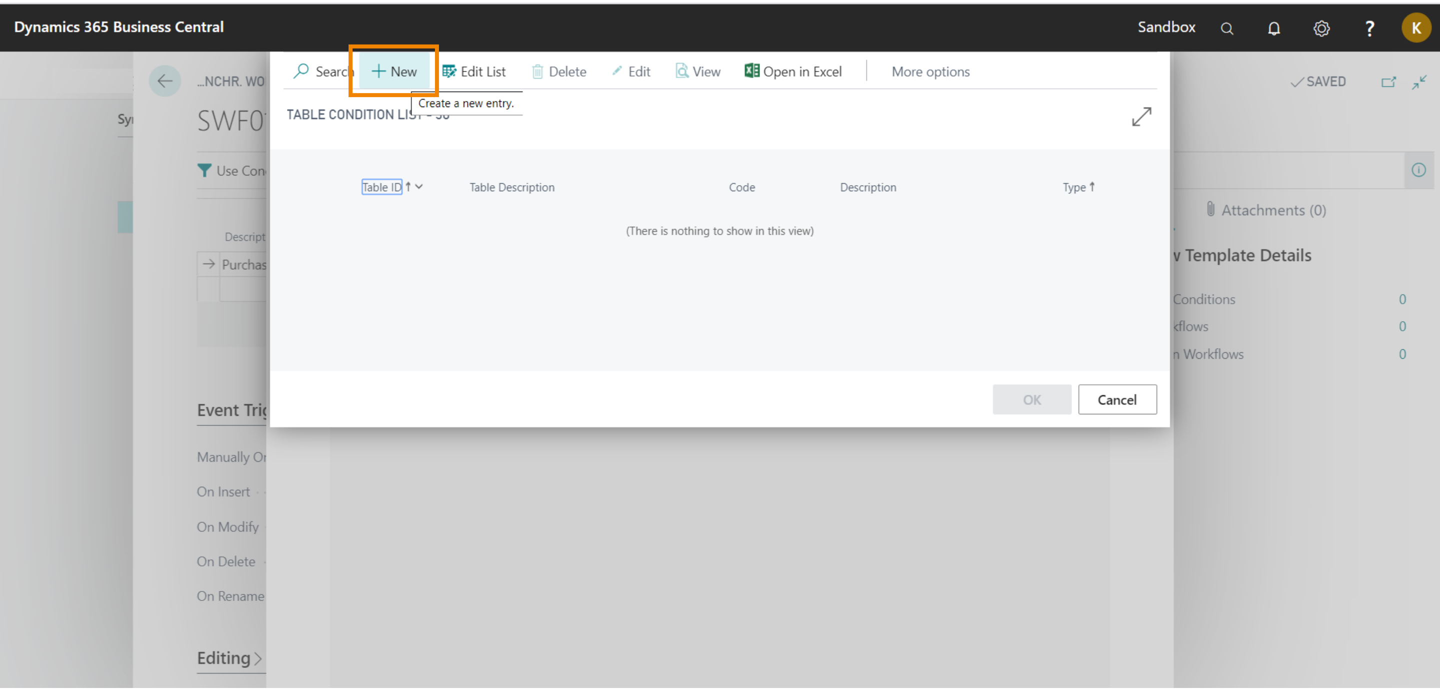
Scenario 2: Stop Posting – Table Condition

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:**

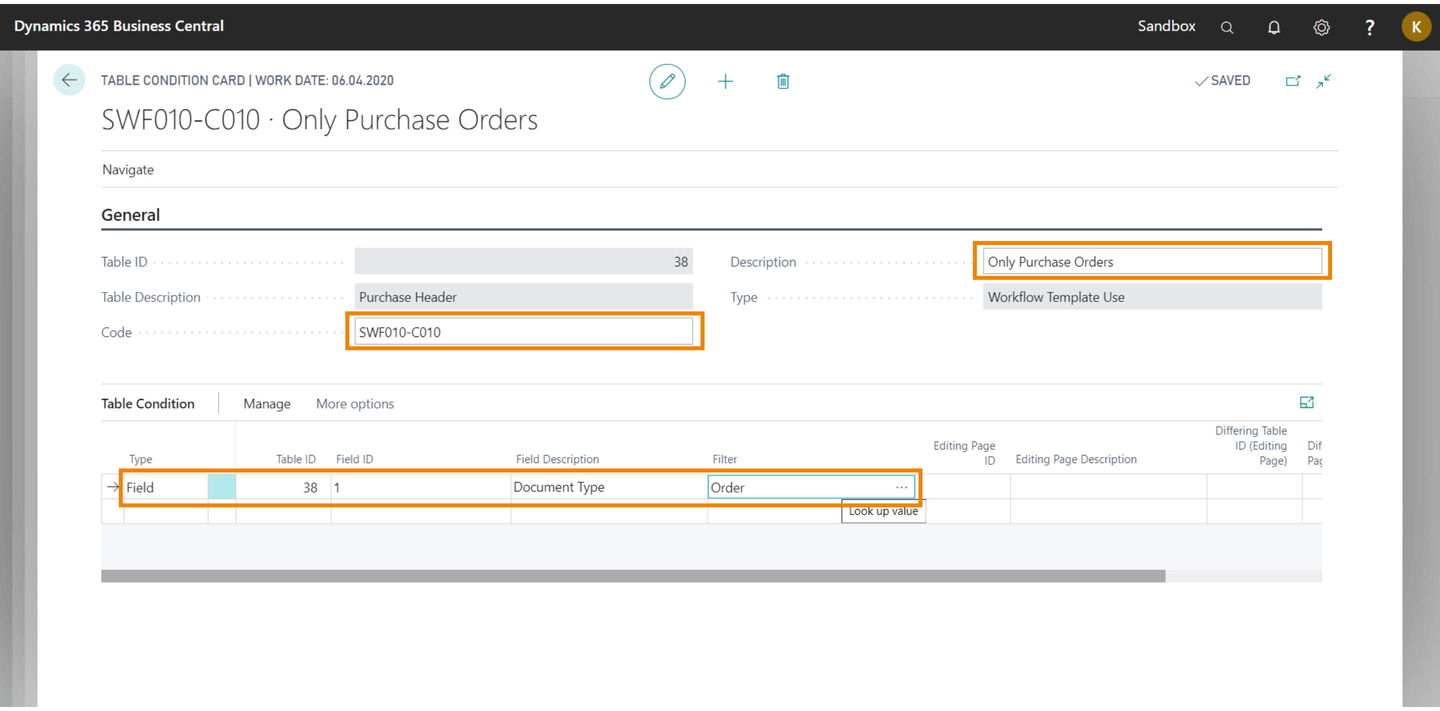
   Enter Type → Field

   Enter Table ID → 38

   Enter Field ID → 1

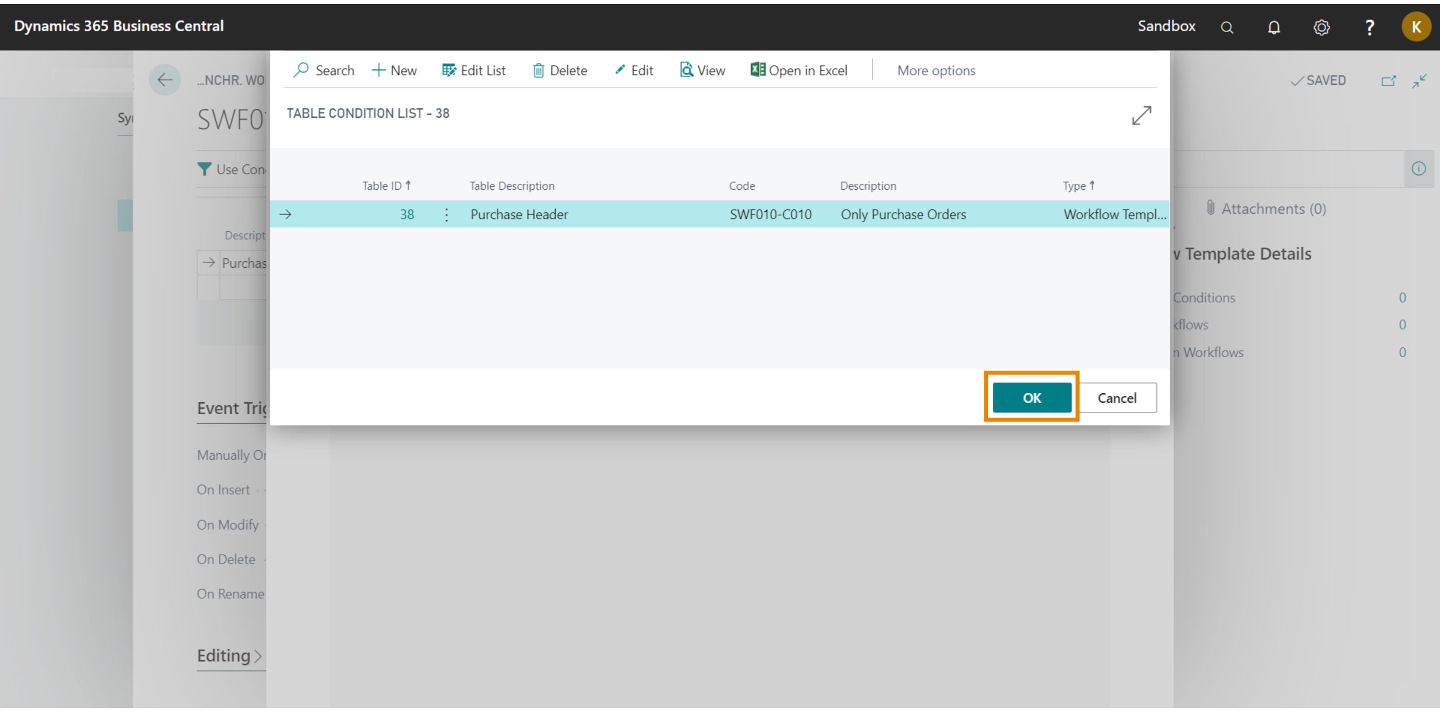
   Enter Filter → Order

3) Close page



Scenario 2: Stop Posting – Table Condition

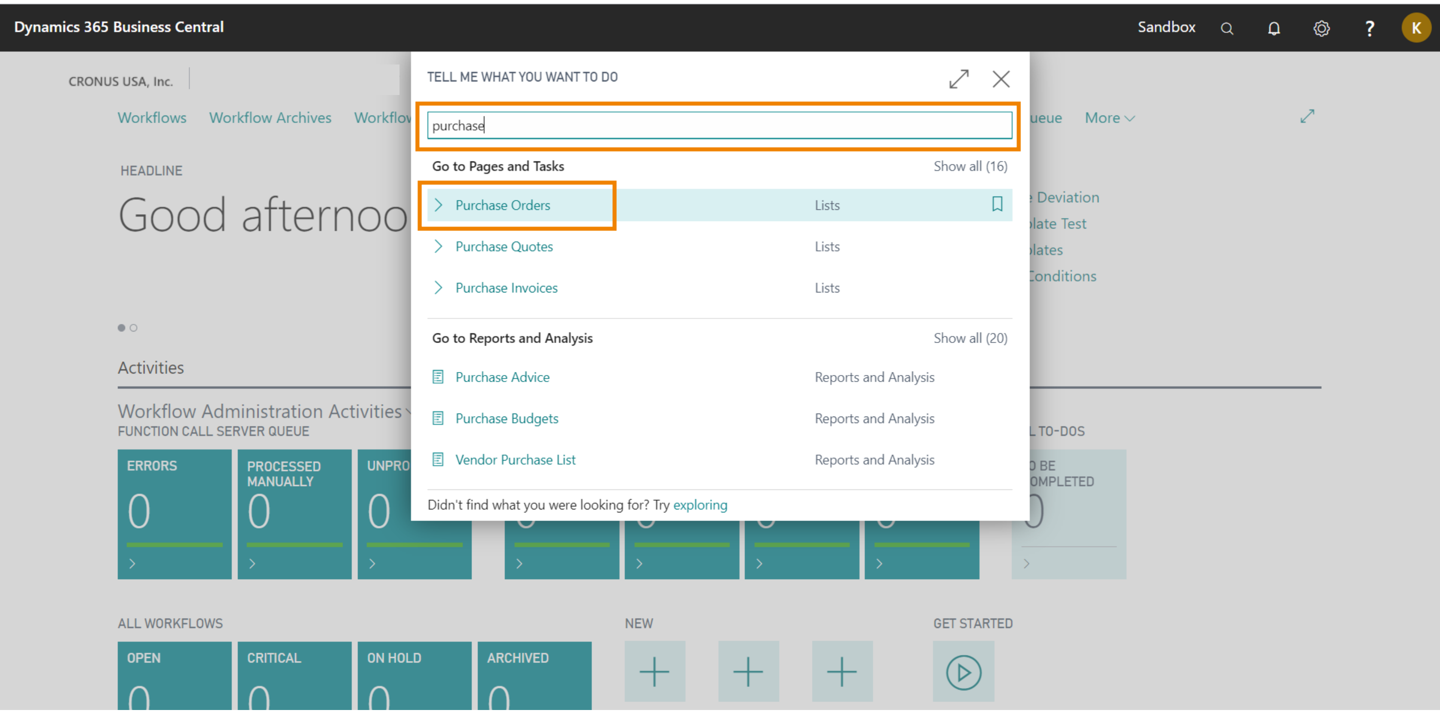
1) Click on Ok
2) Close all pages



User Perspective Scenario 2

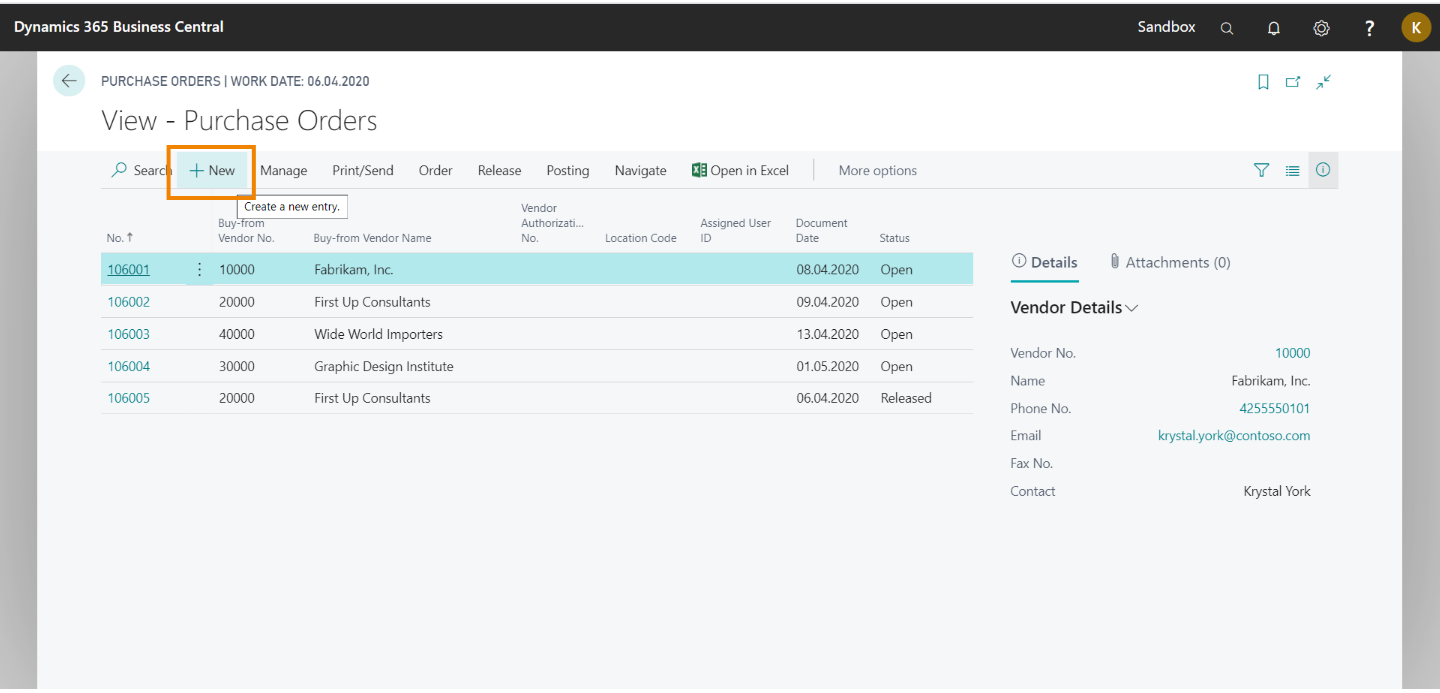
User Perspective Scenario 2

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



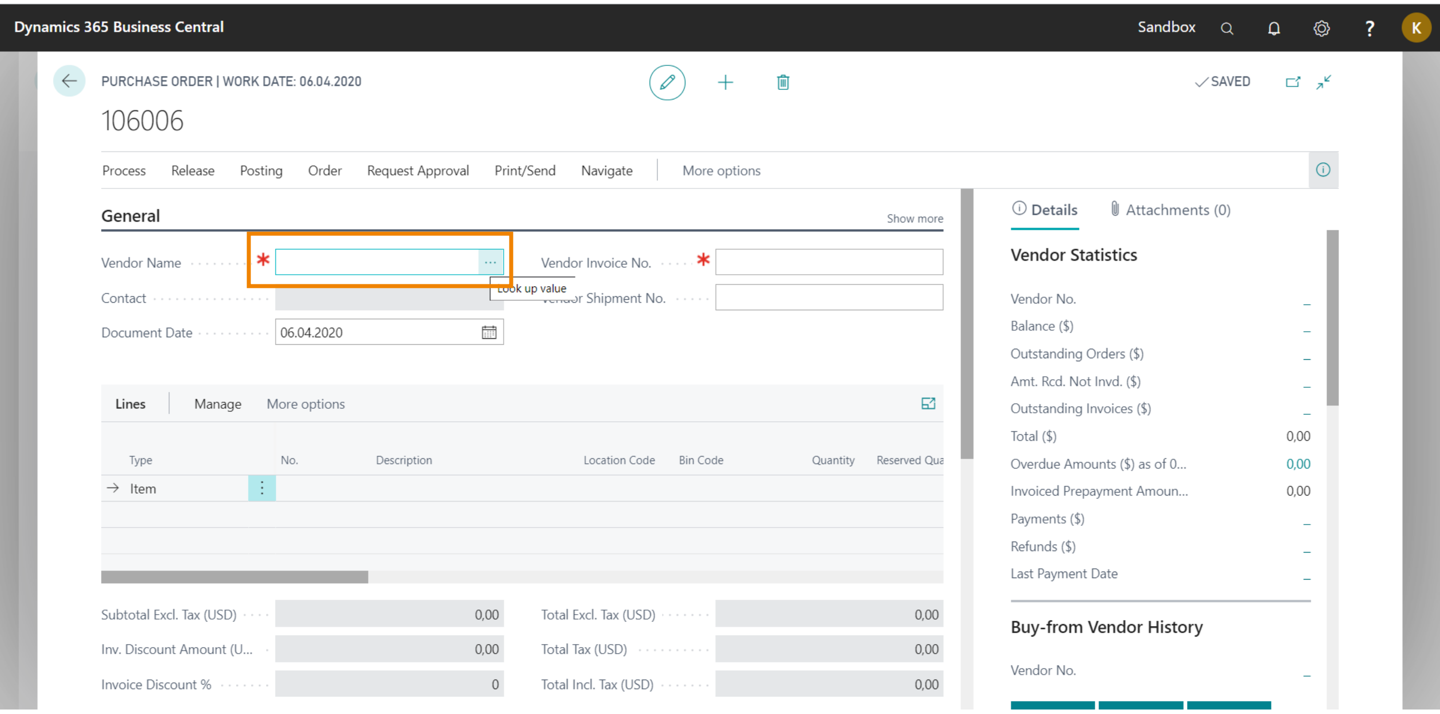
User Perspective Scenario 2

1) Click on +New



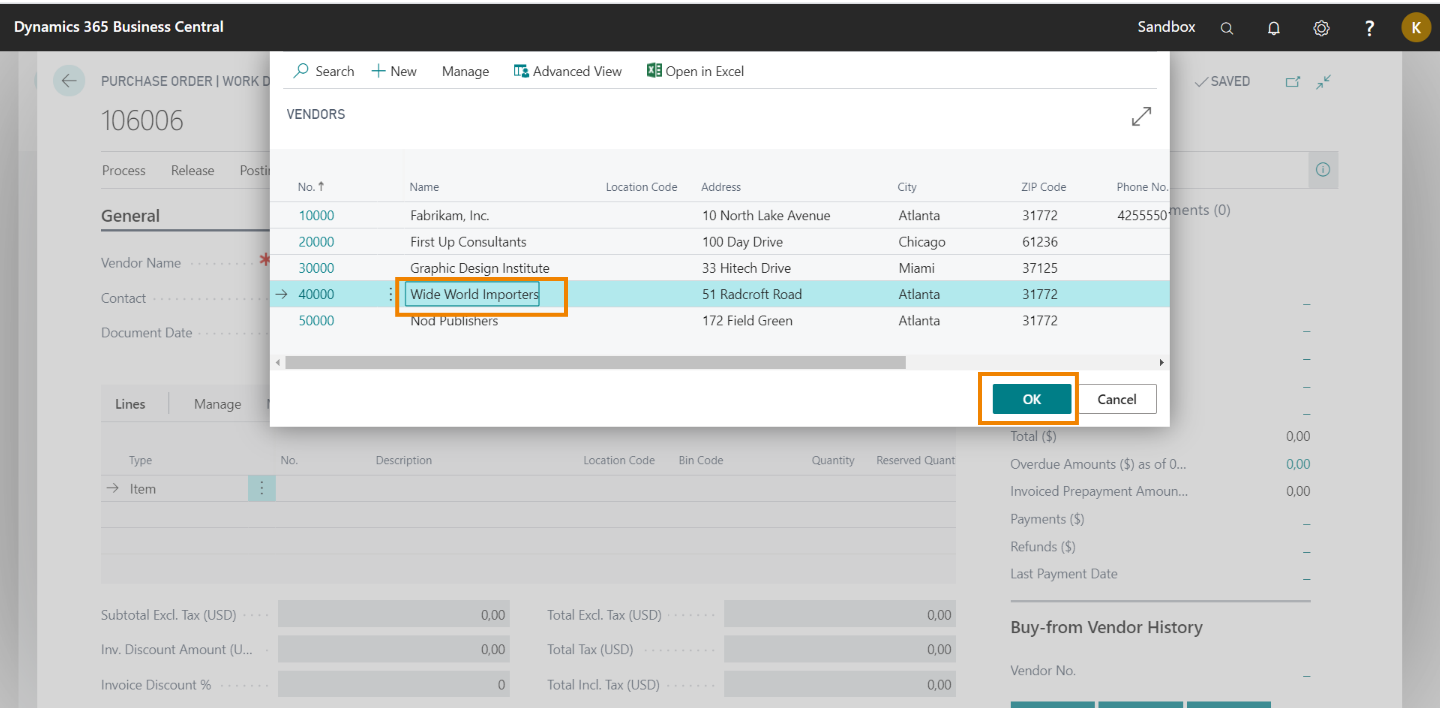
User Perspective Scenario 2

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



User Perspective Scenario 2

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



User Perspective Scenario 2

1) **General:**

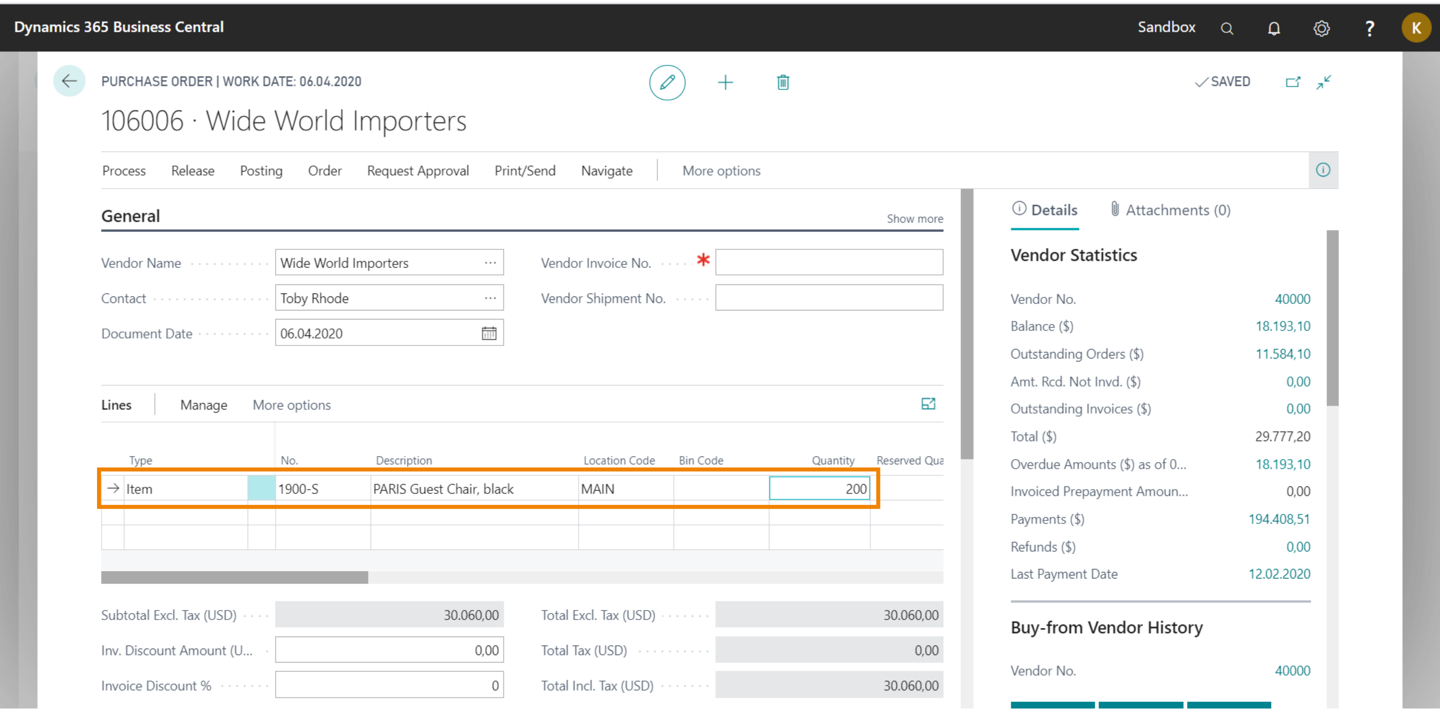
Enter Type → Item

Enter No. → 1900-S

Enter Description → Paris Guest Chair, black

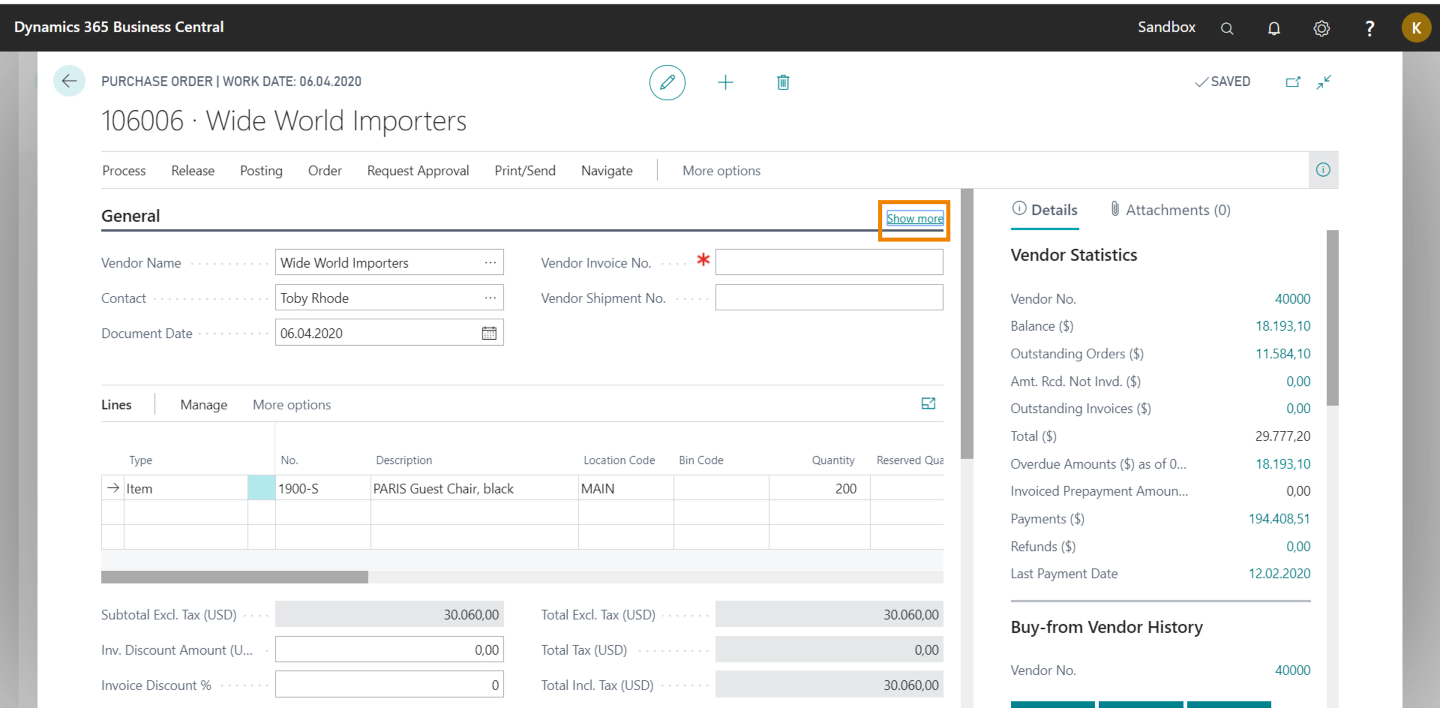
Enter Location Code → MAIN

Enter Quantity → 200



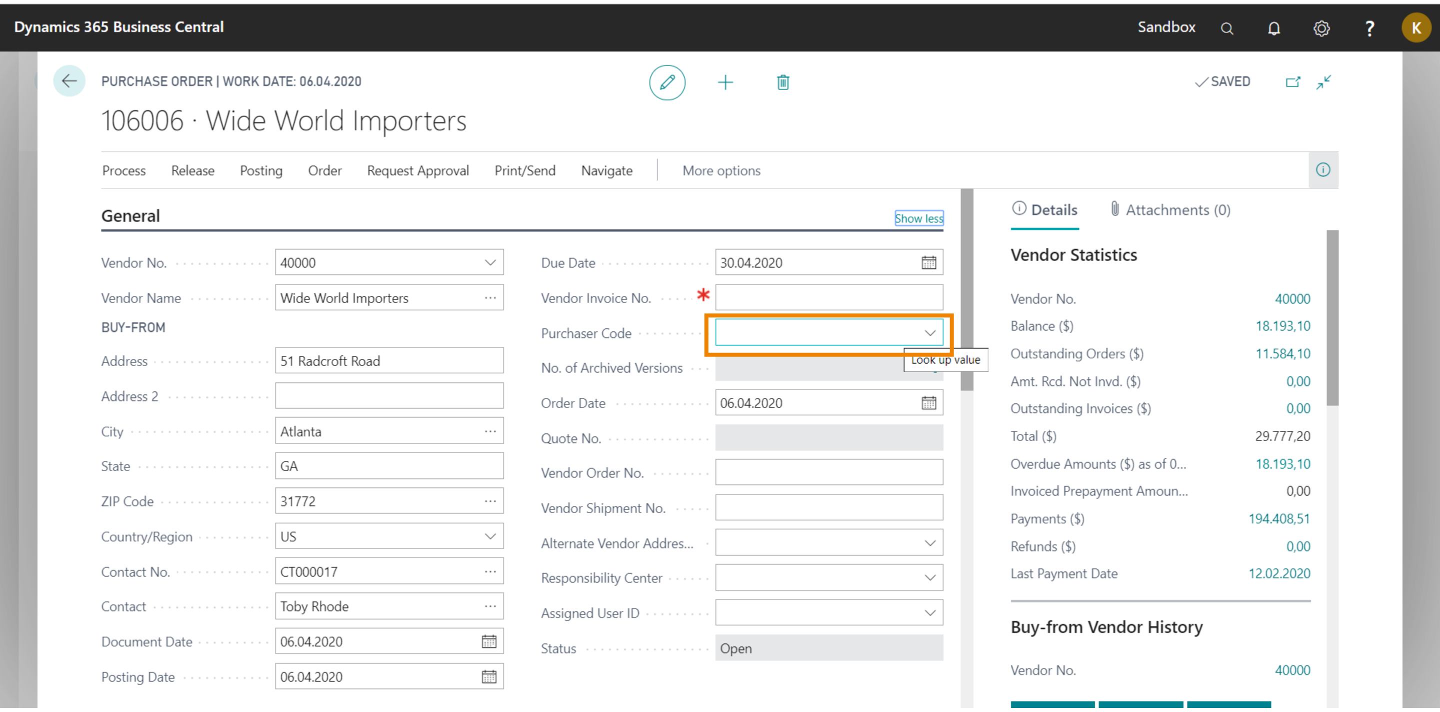
User Perspective Scenario 2

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



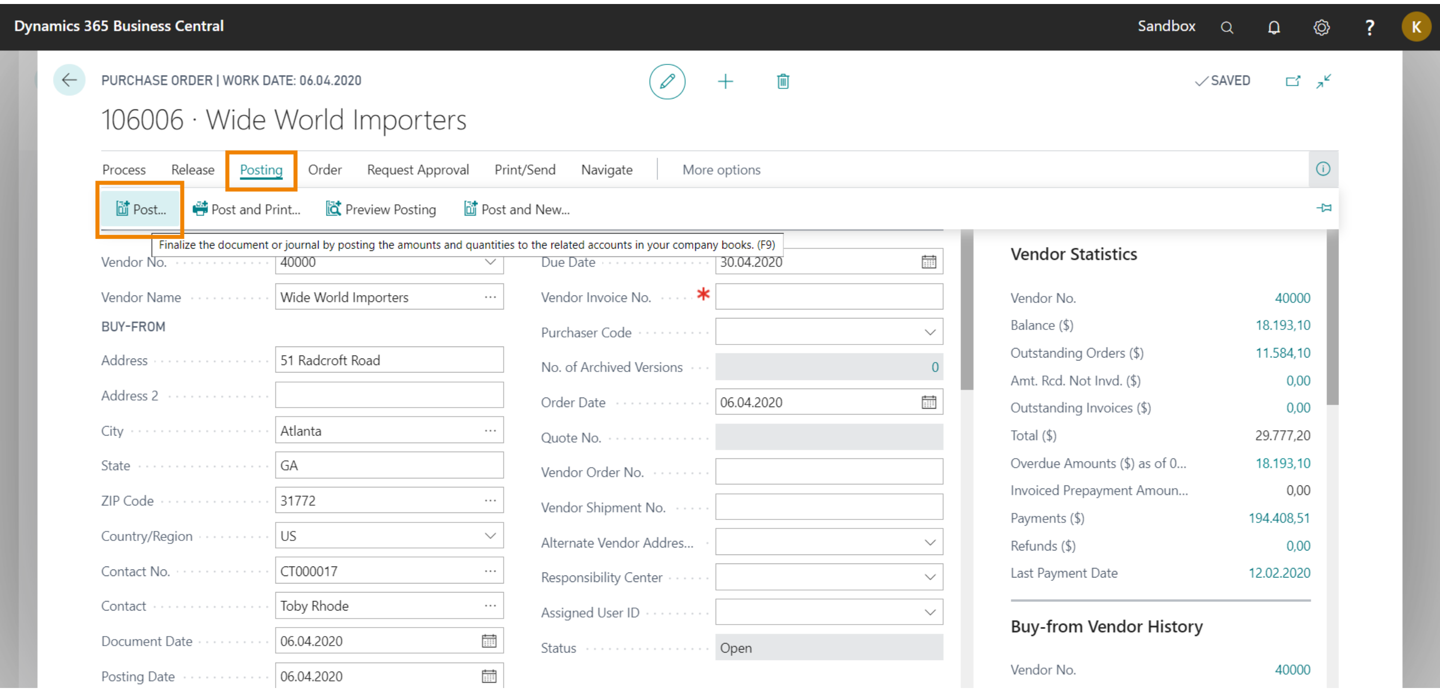
User Perspective Scenario 2

1) **General:** Field Purchaser Code is empty



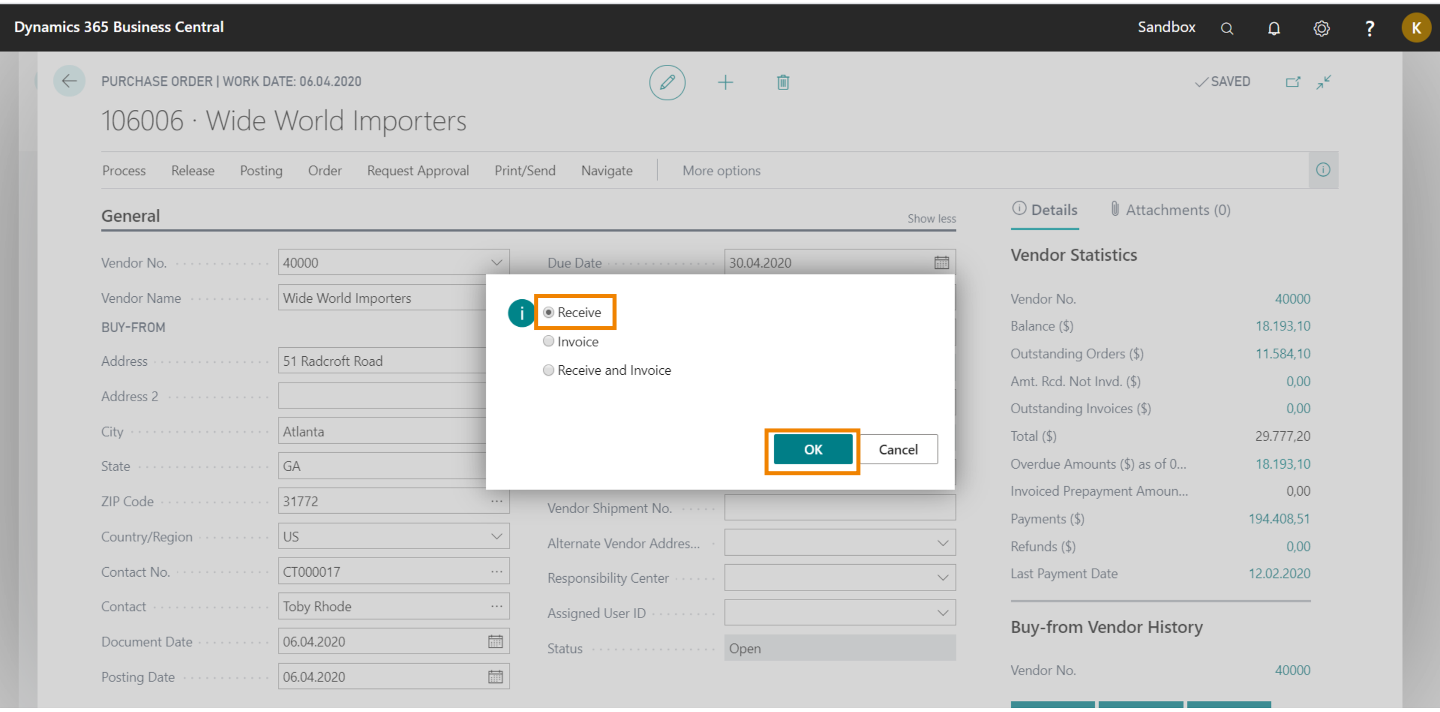
User Perspective Scenario 2

1) Click on Posting
2) Click on Post



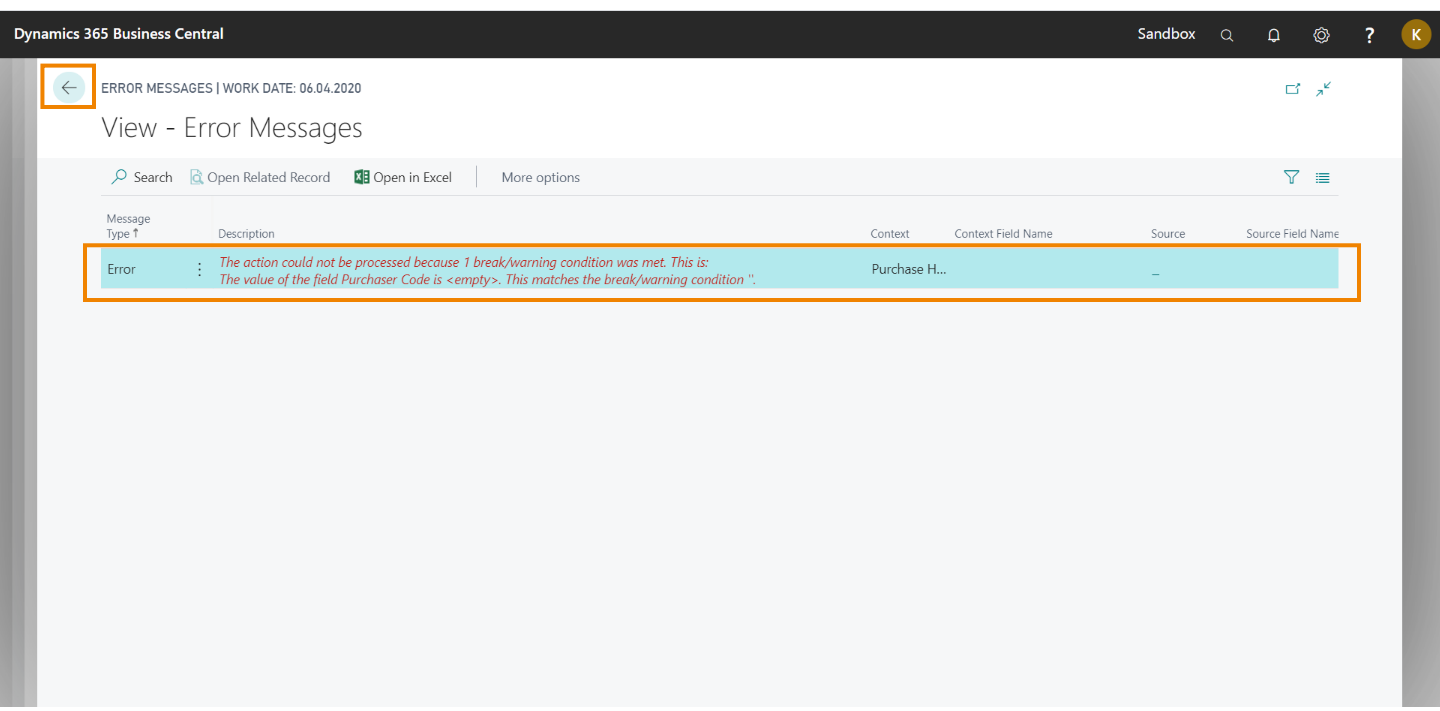
User Perspective Scenario 2

1) Click on Receive
2) Click on Ok



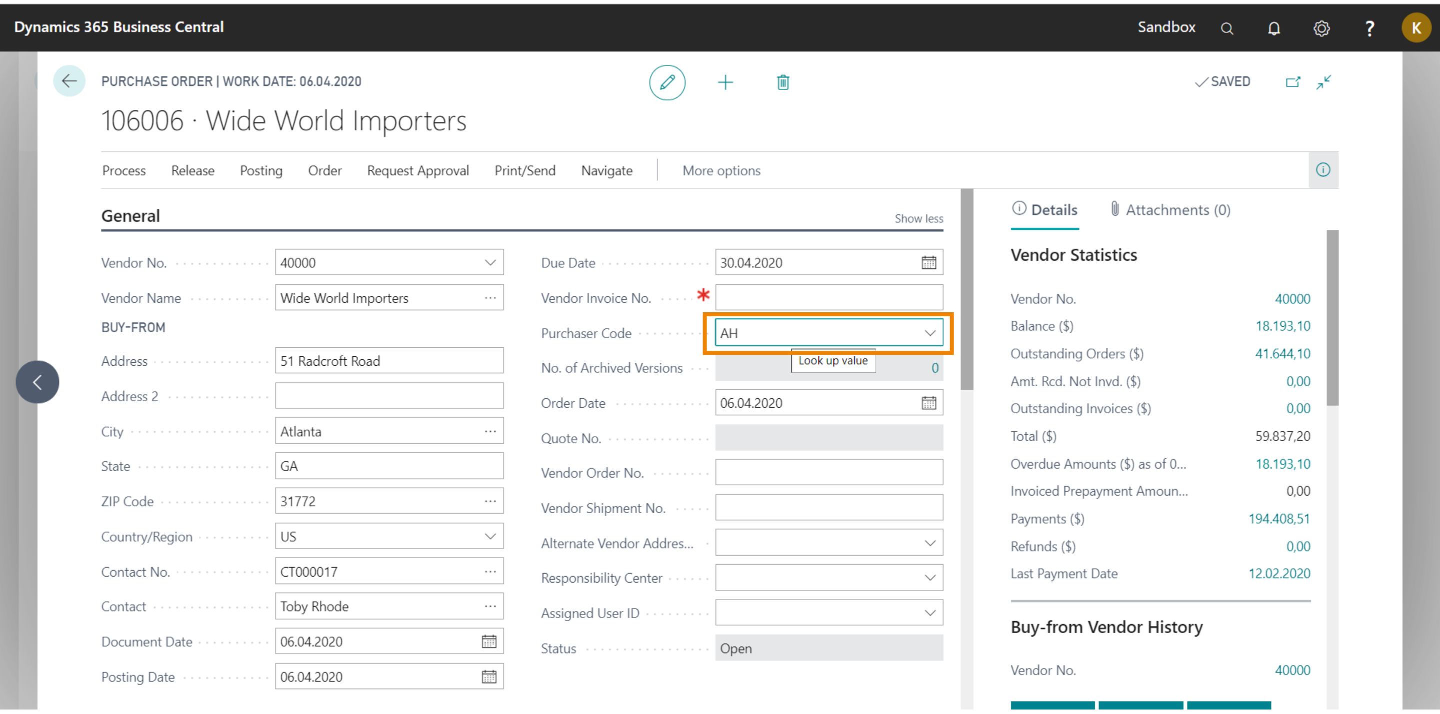
User Perspective Scenario 2

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



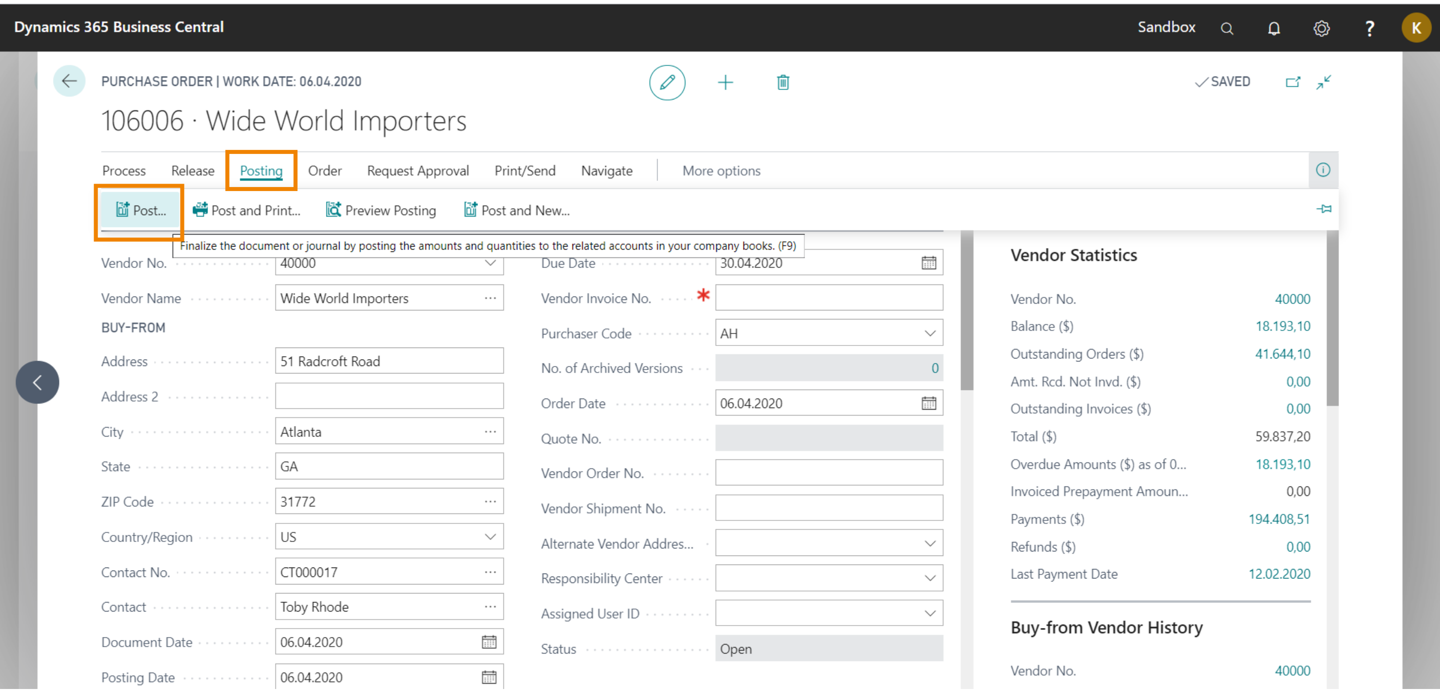
User Perspective Scenario 2

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



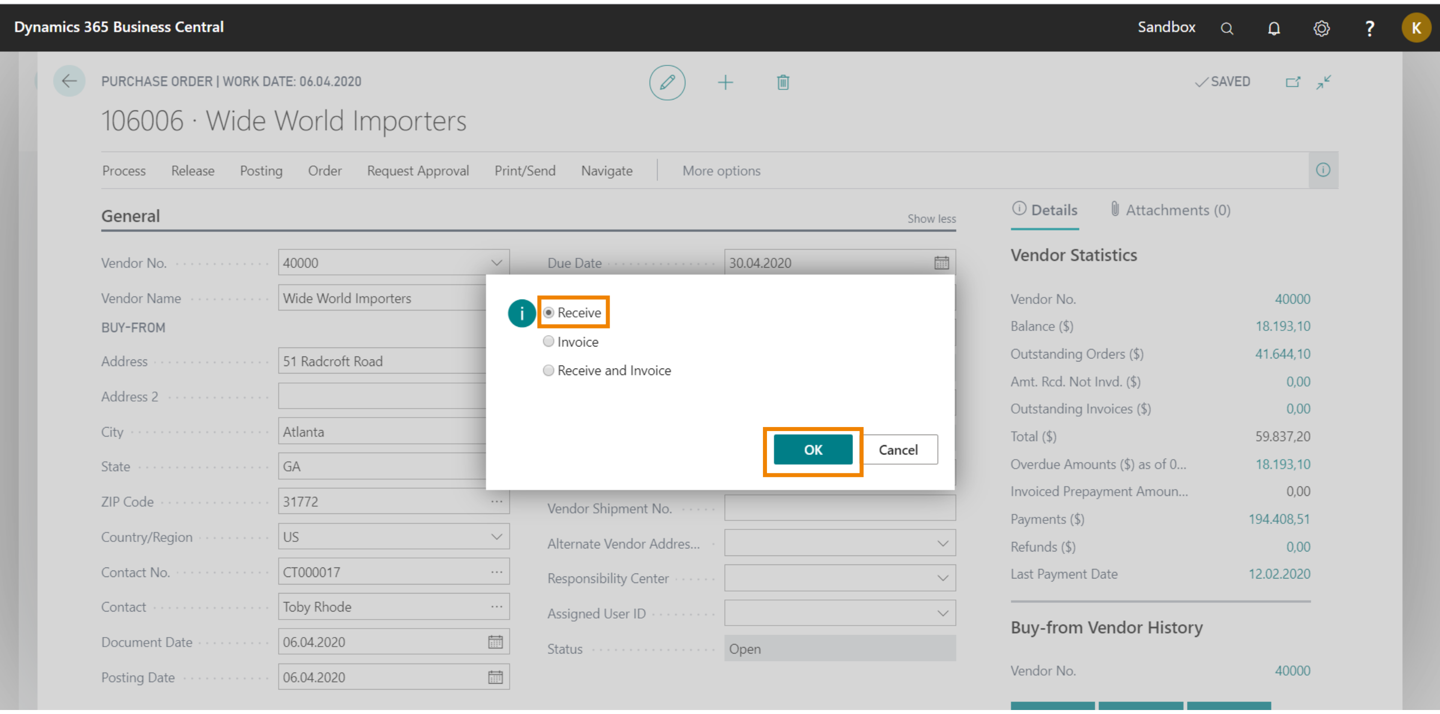
User Perspective Scenario 2

1) Click on Posting
2) Click on Post



User Perspective Scenario 2

1) Click on Receive
2) Click on Ok



User Perspective Scenario 2

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