

TRANSFER APPROVAL WORKFLOW

The Transfer Approval Workflow is an app for Microsoft Dynamics 365 Business Central. This is perfect for customers who are looking to automate their approval process, allowing you to set up approvals for all transfer order in Dynamics 365.

Main feature

- Workflow Template
- Send Approval Request
- Approve, Reject, Delegate request
- Add comment related to the approval

YOU WANT TO SEND US YOUR
SUGGESTIONS ?

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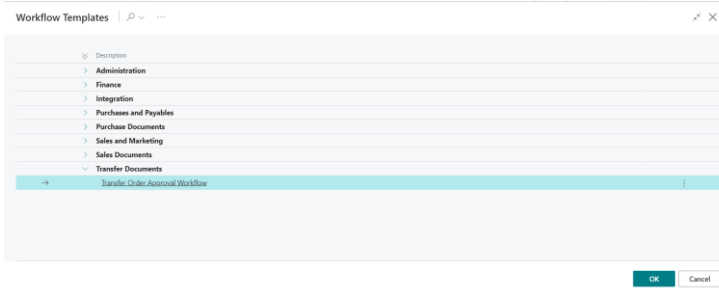
WORKFLOW TEMPLATE

To save time when creating a new approval workflow, you can use "Transfer Order Approval Workflow" template.

"Transfer Order Approval Workflow" is non-editable.

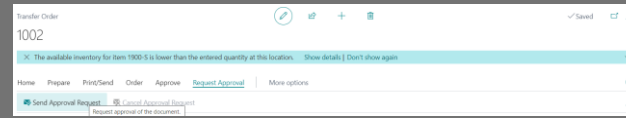
To create a workflow from a workflow template:

- 1- Choose the  icon, enter **Workflow**, then choose related link
- 2- Choose the **New Workflow from Template** action. The **Workflow Templates** page opens
- 3- Select "**Transfer Order Approval Workflow**", then choose **OK**

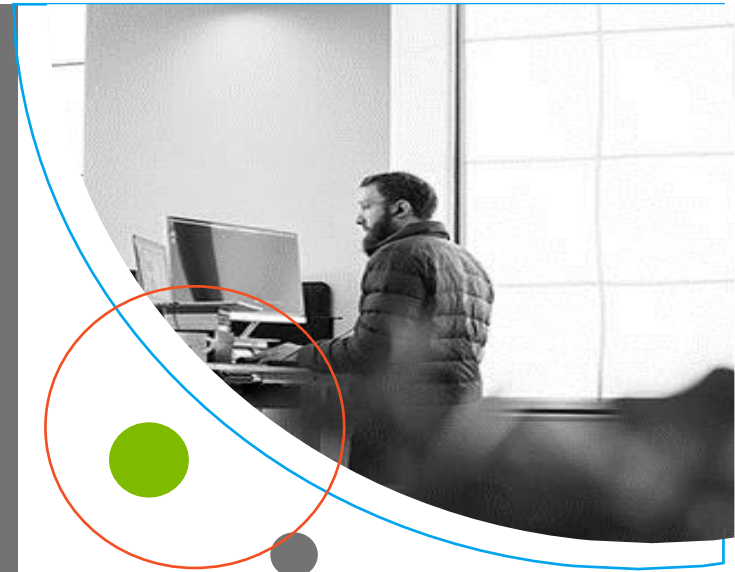
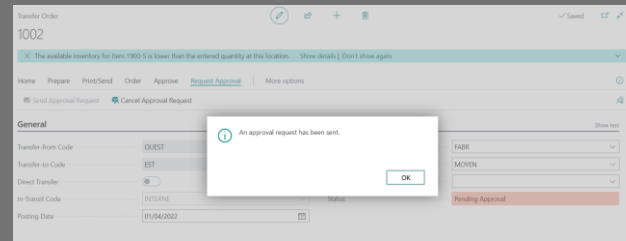


SEND APPROVAL REQUEST

Once we have the transfer order ready we can send the approval request.

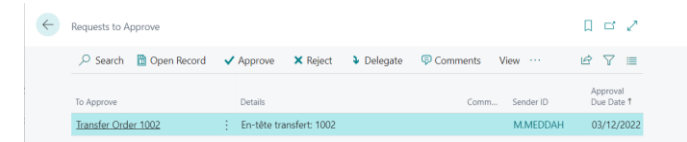


A request has been sent to the appropriate user and the status on the document changes to "Pending Approval".



APPROVE DOCUMENT

You can find pending approvals from the cues of the role center or just by searching "**Requests to Approve**". Is in this page where the approver will have to accept or reject the requests that has received.



At this point we can go to the **Transfer order** with the "**Open Record**" action to verify the information about the approval. We can approve, reject, or delegate it. If we approve, the status of the **Transfer order** turns to "**Released**".

