# 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





# C O N S U L T I N G



#### 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 Dicon, 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

Workflow Temp	lates   $P \lor \cdots$	,* ×
8	Description	
	Administration	
	Finance	
	Integration	
	Purchases and Payables	
	Purchase Documents	
	Sales and Marketing	
	Sales Documents	
	Transfer Documents	
$\rightarrow$	Transfer Order Approval Workflow	

## SEND APPROVAL REQUEST

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

ander Order 🖉 et + 🖩 1002	√Saved	d 3
× The available inventory for item 1900-S is lower than the entered quantity at this location. Show details    Don't show again		~
Iome Prepare Print/Send Order Approve Request Approval More options		٥
Send Approval Request Record Account Record		18

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

Transfer Order 1002		Ø \$	+	8		√Saved 🖾 s <sup>v</sup>
× The available inventory for item 1900-S in	is lower than the entered quar	tity at this location. Show	details   Don't	show again		~
Home Prepare Print/Send Order	Approve Request Appro	al More options				
🕸 Send Approval Request 🛛 🐺 Cancel App	proval Request					18
General						Show less
Transfer-from Code OI	NUEST	An approval request has be	FABR			
Transfer-to Code	ST				MOYEN	
Direct Transfer				ОК		
In-Transit Code	ATERNE	× I	Status ····		Pending Approval	
Posting Date	1/04/2022					



### **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.

$\leftarrow$	Requests to Approve						0 4 2	
	🔎 Search 📲 Open Record	~	Approve	🗙 Reject	Delegate	Comments	View ····	@ 7 ■
	To Approve		Details			Comm	n Sender ID	Approval Due Date 1
	Transfer Order 1002		En-tête tra	ansfert: 1002			M.MEDDAH	H 03/12/2022

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"**.



