WORKFLOW SETUP & PROCESS

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1. Introduction:

1.1 Welcome to Workflow Setup

Welcome to the Workflow Setup and Process User Manual for Microsoft Dynamics 365 Business Central. This manual is designed for users with no prior technical background or experience with Business Central workflows.

This comprehensive manual will guide you through every aspect of workflow setup and management, from initial configuration to advanced approval scenarios. By the end of this guide, you'll have the knowledge to implement robust approval processes that improve efficiency, maintain control, and ensure compliance across your organization.

1.2 What is a Workflow?

Workflow is an automated business process that helps you manage approvals, notifications, and task assignments within your organization. Think of it as a digital assistant that ensures important business decisions follow the proper approval chain.

Why Use Workflows?

- Ensure proper approval processes are followed
- Reduce manual errors and delays
- Maintain audit trails for compliance
- Improve business efficiency and accountability
- Standardize business processes across your organization

Common Uses:

- Purchase order approvals
- Invoice approvals
- Customer credit limit changes
- Item master data changes
- Vendor approvals

2. Understanding workflows:

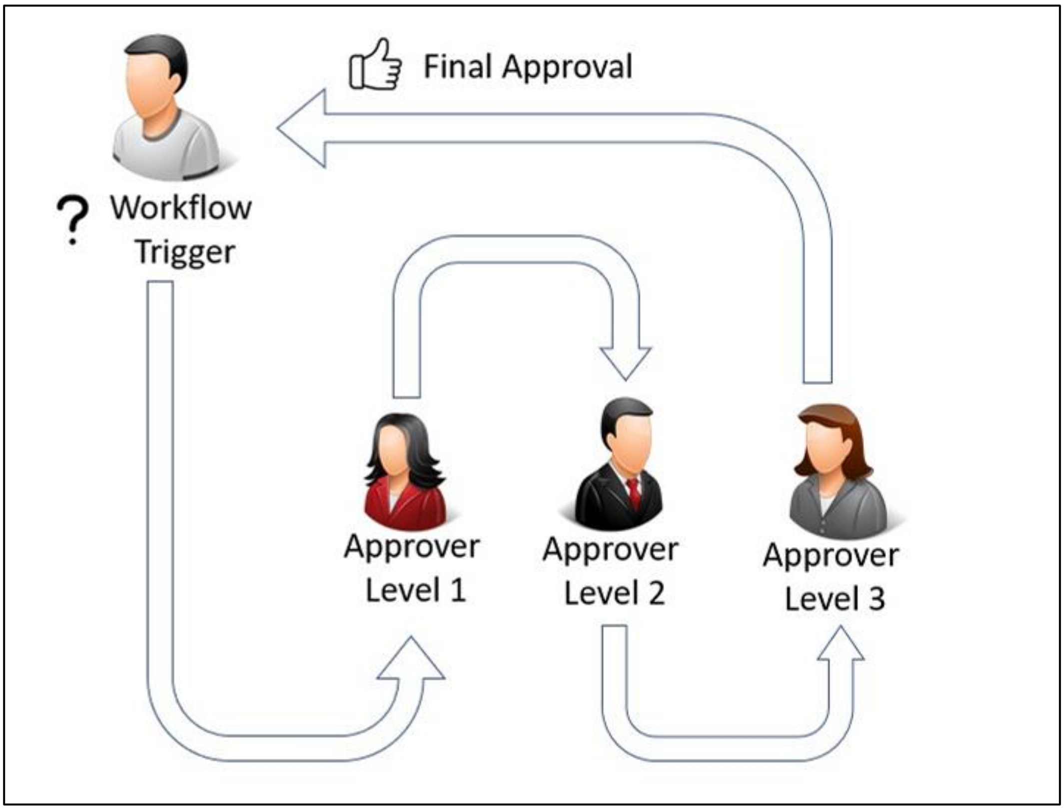
A workflow is a sequence of tasks triggered by an action, a condition, or a rule. Workflows are usually implemented to integrate business logic into an organization, such as the separation of duties, unifying processes, or to apply best practices.

The workflows can be designed to create requests for approval of a record field change while keeping the old data in case the request isn't approved. The new value won't be implemented until the last request is approved.

The business logic could be the approval of:

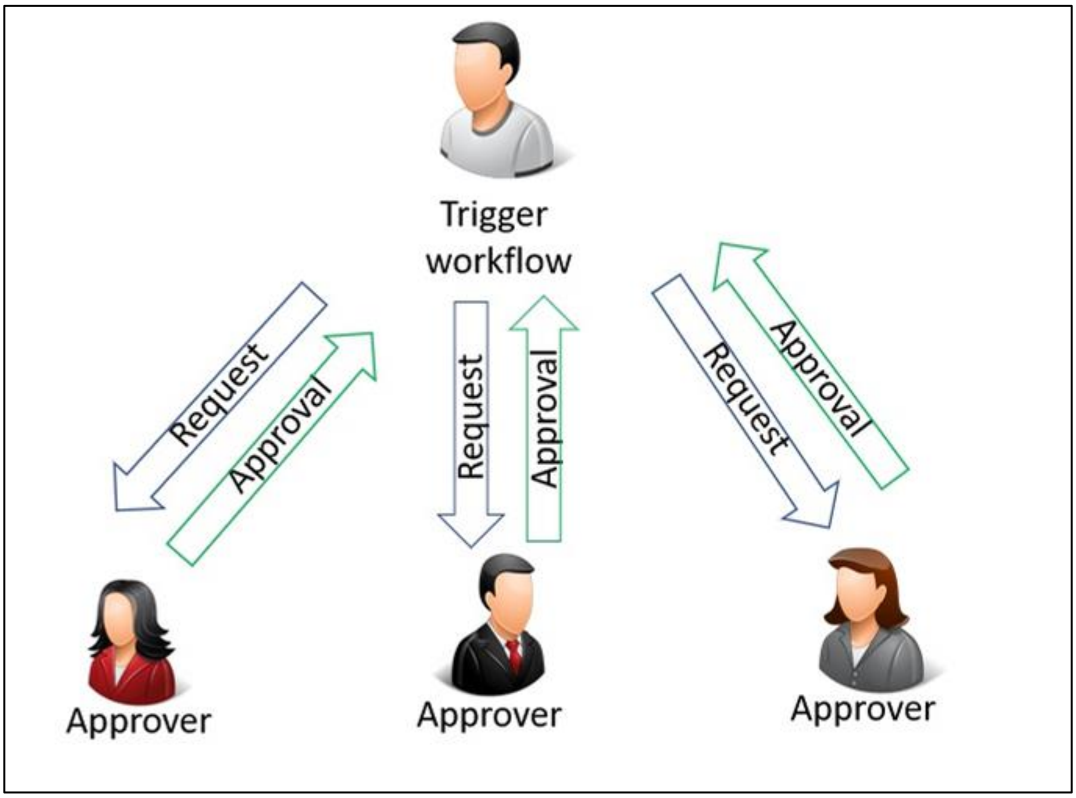
- New master data such as general ledger (G/L) accounts, customers, vendors, or items.
- Changes to fields in existing records containing sensible information, such as Vendor Bank Account No. or Customer Credit Limit.
- Changes to fields in existing records containing business critical information, such as Item Sales Prices Item Sales Prices.
- Purchase documents

The following illustration is example of a workflow with sequential approval triggered by a user. By triggering the workflow, an approval request is created for the first approver.



You see in the illustration above how the request must be approved by the first approver before it's sent on to the next one. If the request isn't approved by the first approver, the request will never go to the next.

The following illustration shows a parallel approval triggered by the user. A parallel approval means the approval request is sent to a l Approvers simultaneously.



NOTE:

For a workflow with multiple approvers, all approvers must approve each step before the workflow can move forward to the next event. Approval from just one approver will not move the workflow forward.

The default version of Business Central supports three types of workflows:

- **Built-In Approval Workflows.**
  - Template-based workflows designed for common business scenarios.
- **Power Automate Flows.**
  - Automated Flows: Triggered by Business Central events.
  - Instant Flows: Manually triggered from action menus.
  - Approval Flows: Complex approval routing with external integration.
- **Custom Workflows.**
  - Specialized workflows created through code customization for unique business requirements not covered by standard templates.

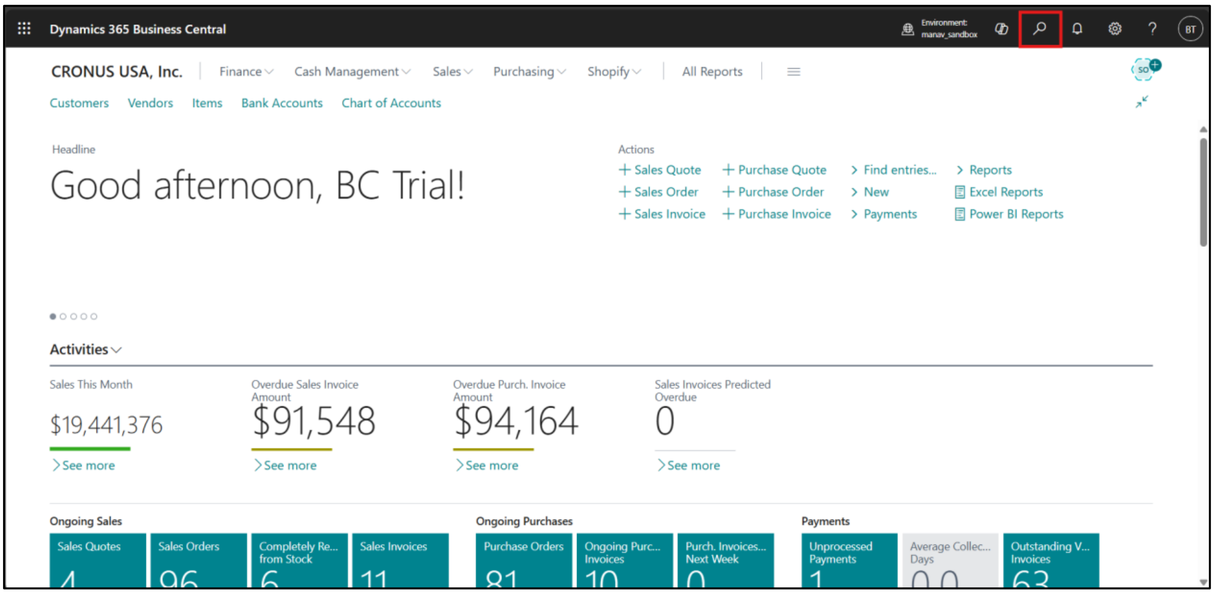
3. Setup Approval User:

Before you can create workflows that involve approval steps, you must set up the workflow users who are involved in approval processes. On the **Approval User Setup** page, you also set amount limits for specific types of requests and define substitute approvers to whom approval requests are delegated when the original approver is absent.

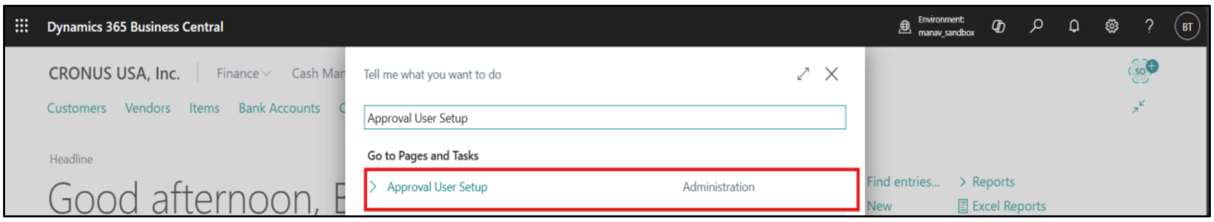
Enabled when "**Approver Type**" is set to "**Approval**".

To setup Approval Users:

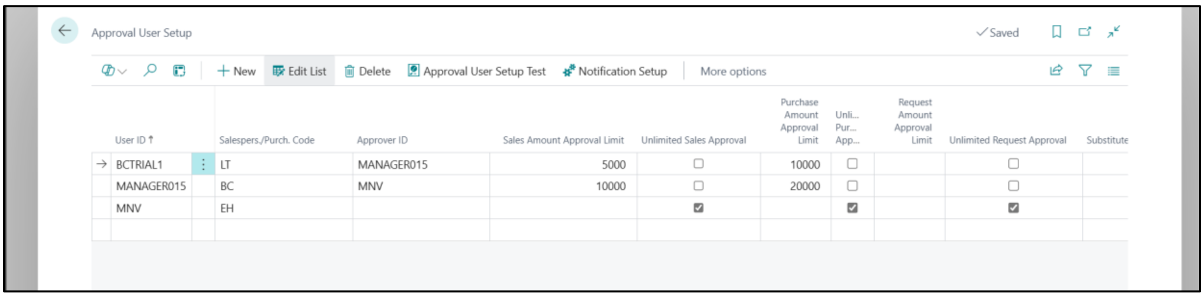
I. Open Business Central and Click the **Tell me icon** (magnifying glass in the top-right corner). Or (Alt + Q)



II. Type "**Approval User Setup**" in the Search Box



III. It'll open this page



Field	Description
User ID	Select the user ID of the person involved in the approval process.
Salesperson/Purch. Code	Specify the salesperson or purchaser code that applies to the user. Typically used when the salesperson or purchaser responsible for the customer or vendor is also the approver of sales or purchase requests.
Approver ID	Select the user ID of the person who must approve requests made by the person specified in the User ID field.
Sales Amount Approval Limit	Specify the maximum sales amount in LCY that the person in the User ID field can approve.
Unlimited Sales Approval	Indicates that the person in the User ID field can approve all sales requests, regardless of the amount. Cannot be used in conjunction with the Sales Amount Approval Limit.
Purchase Amount Approval Limit	Specify the maximum purchase amount in LCY that the person in the User ID field can approve.
Unlimited Purchase Approval	Indicates that the person in the User ID field can approve all purchase requests, regardless of the amount. Cannot be used in conjunction with the Purchase Amount Approval Limit.
Request Amount Approval Limit	Specify the maximum amount in LCY that the person in the User ID field can approve for purchase quotes. Requires the Approver Chain setting in the Approver Limit Type field on the Workflow Response page.
Unlimited Request Approval	Indicates that the person in the User ID field can approve all purchase quote requests, regardless of the amount. Cannot be used with Request Amount Approval Limit.
Substitute	Select the user ID of the substitute approver. This user approves requests if the primary approver is unavailable. The system prioritizes the substitute, then the direct approver, then the approval administrator.
Email	Specify the email address of the person in the User ID field.
Approval Administrator	Specify the user who can manage and override approval workflows, including delegating approvals or deleting overdue requests. Only one person can be the approval administrator.

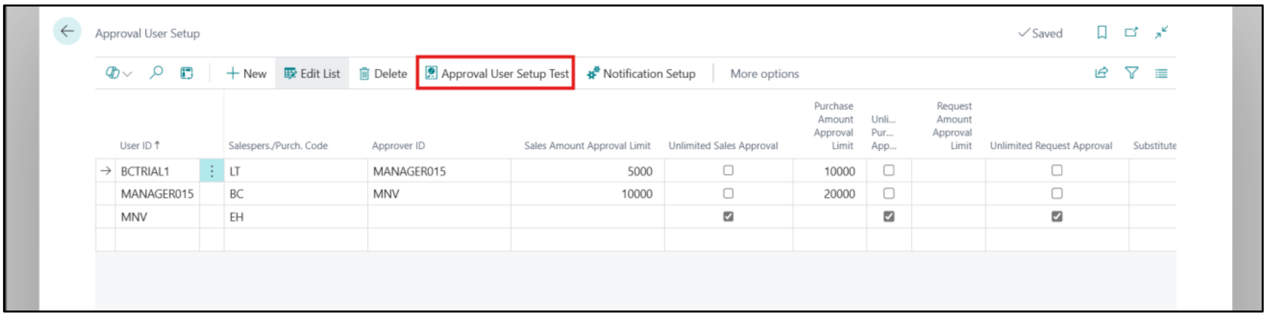
NOTE:

The Approval User Setup defines a tiered approval process. **BCTRIAL1** can approve up to 5,000 for sales and 10,000 for purchases—anything above must be approved by **MANAGER015**. Similarly, **MANAGER015** can approve up to 10,000 for sales and 20,000 for purchases; beyond that, approval must come from **MNV**, who has unlimited approval rights. This ensures that higher-value approvals are escalated to the appropriate authority.

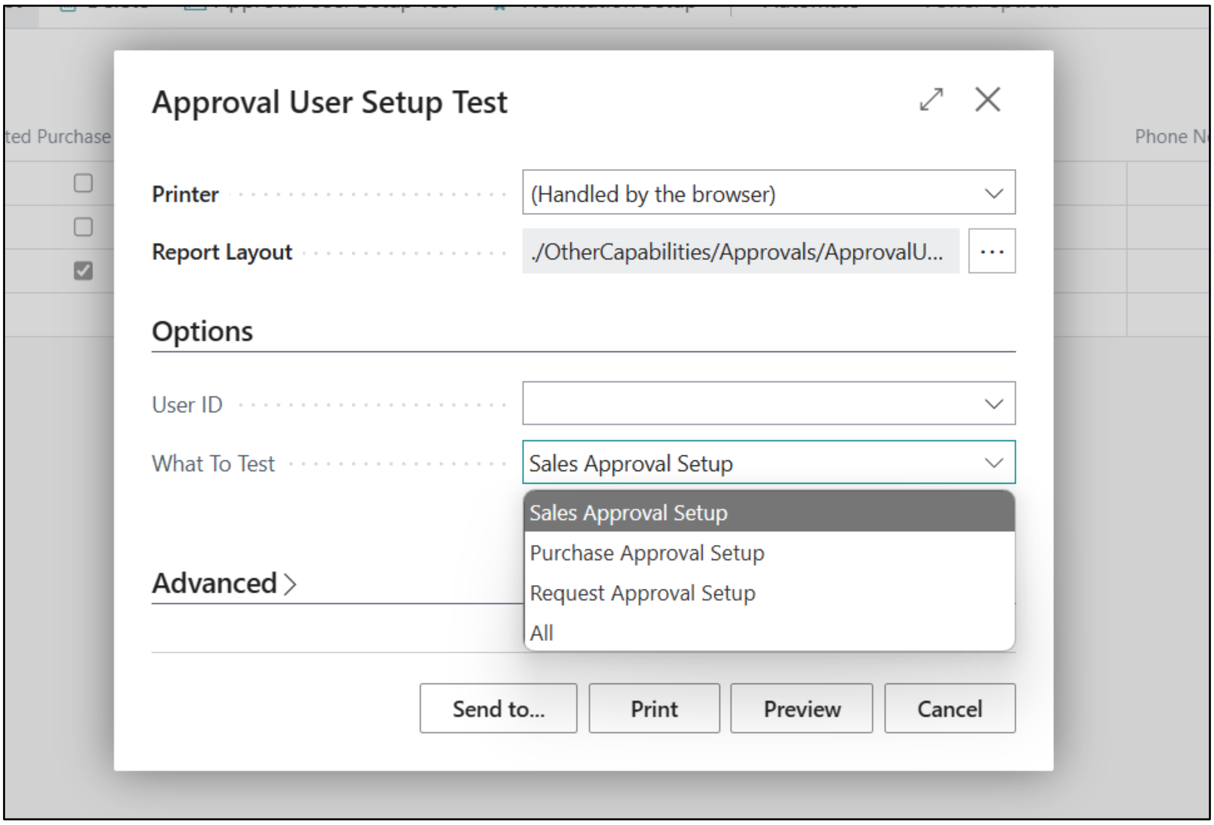
IV. To test the approval user setup, choose the Approval User Setup Test action. This validation ensures:

- All required fields are properly configured.
- Approval hierarchies are logical and complete.

- Email addresses are valid for notifications.
- No circular approval references exist.
- Click On “**Approval User Setup Test**”



- It’ll Open a Request Page



- After selecting “**User**” and “**what to Test**” field, when you click on preview it will run a report which shows the flow of the workflow.

4.Workflow User Group Setup:

Before you can create workflows, you must set up the users who take part in workflows. This is necessary, for example, to specify who will receive a notification to act on a workflow step.

On the Workflow User Group page, you set up users under workflow user groups, and you specify the users' number in a process sequence, such as an approver chain.

Enabled when "**Approver Type"** is set to "**Workflow User groups**".

Workflow User Groups enable sophisticated approval **routing beyond simple one-to-one approver relationships**. They support:

- Sequential Approvals: Multi-level approval chains
- Parallel Approvals: Multiple approvers at the same level
- Conditional Routing: Different approval paths based on criteria
- Team-Based Approvals: Group approval scenarios

NOTE: Workflow User Groups vs. Approval User Setup

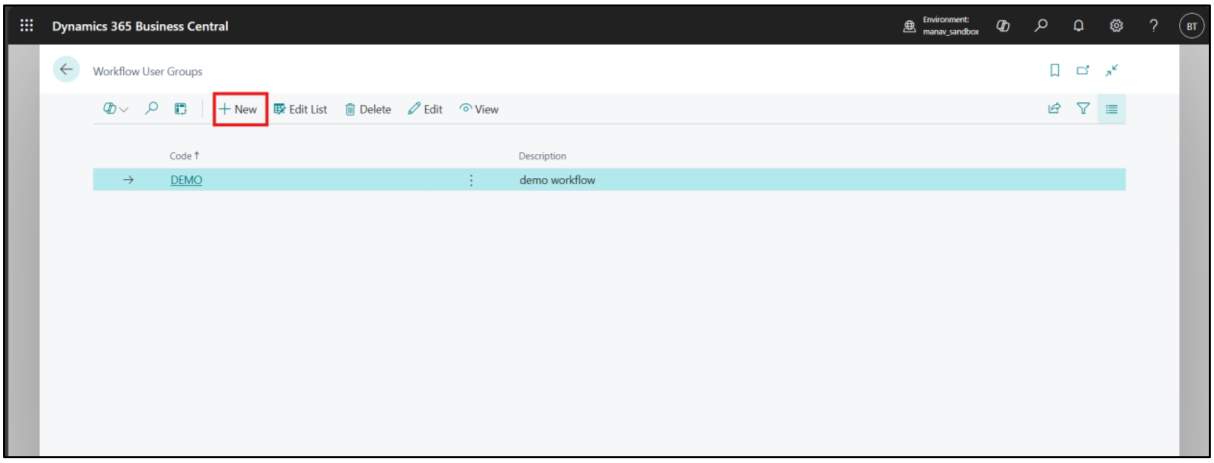
- Workflow User Groups are used to define a sequence of users for structured process routing (e.g., multi-step approvals for document workflows or purchase requisitions). Ideal for scenarios requiring step-by-step involvement from multiple users.
- Approval User Setup is used to configure individual approval permissions and monetary limits (e.g., a manager can approve up to $2,000; a director can approve up to $10,000). Best for financial control and individual authority.

To Setup **Workflow user groups**:

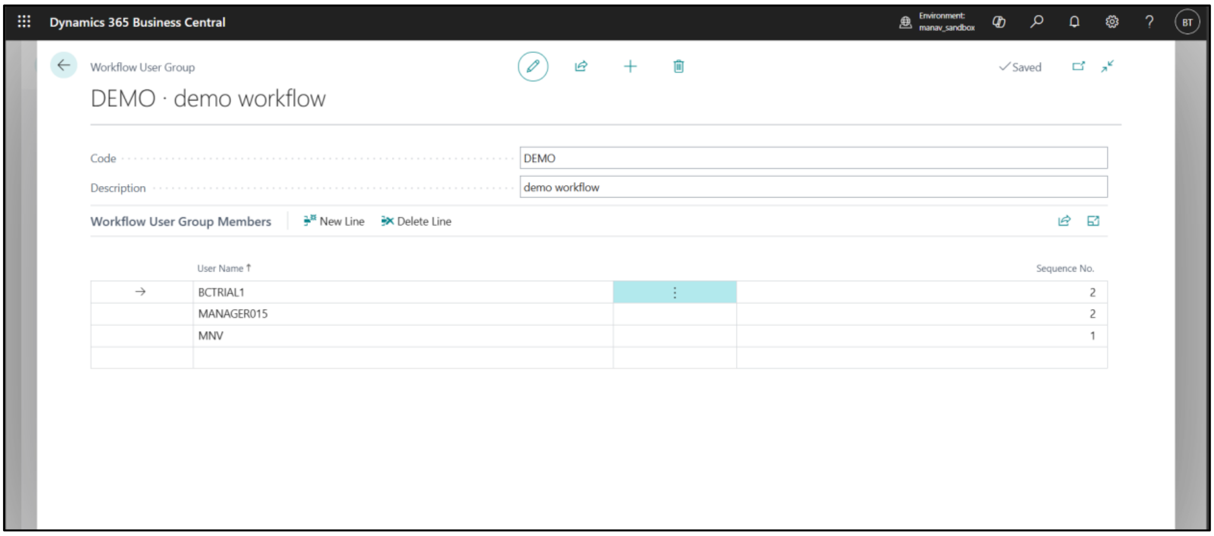
I. Open Business Central and Click the **Tell me icon** (magnifying glass in the top-right corner). Or Use (Alt + Q).

II. Search for "**Workflow User Groups**".

III. It'll open a List page, now Click on "**New**" to Create Workflow user groups.



IV. Now it opens "**Workflow user groups**" page.



V. In the **Code** field, enter a maximum of 20 characters to identify the workflow.

VI. In the **Description** field, describe the workflow.

VII. On the Workflow User Group Members FastTab, fill in the fields on the first line, as described in the following table.

Field	Description
User Name	Specify the user who participates in the workflow. The user must exist in the User Setup page. This ensures the user has necessary permissions to perform workflow actions. You can select User form the Lookup, which will open when you enter the cell.
Sequence No.	Determines the order in which the user participates in the workflow relative to other members in the group. This is especially useful when using Workflow User Groups as part of a multi-step approval process.

NOTE:

In the Workflow User Group **'DEMO'**, the workflow will follow the approval sequence defined by the Sequence No. field for each user.

- **MNV** (Sequence No. 1) will be the first to receive and act on the workflow step.
- **BCTRIAL1** and **MANAGER015** (both with Sequence No. 2) will receive the workflow simultaneously, but only after **MNV** has completed their approval.
- Both **BCTRIAL1** and **MANAGER015** must approve the request for the workflow to proceed or be considered fully approved.

5.Creating Workflow:

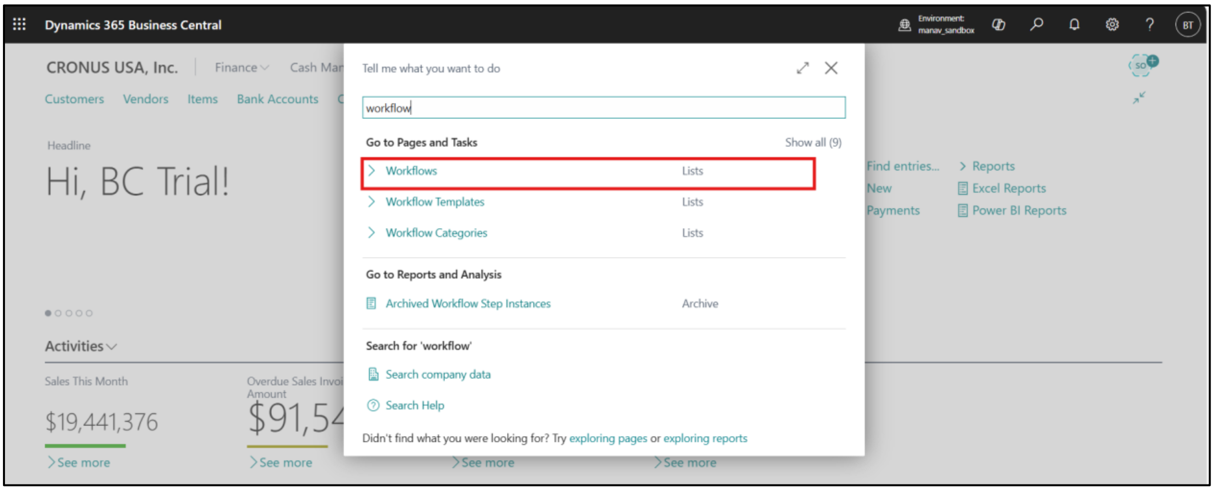
You can create workflows that connect business-process tasks performed by different users. System tasks, such as automatic posting, can be included as steps in workflows, preceded or followed by user tasks. Requesting and granting approval to create new records are typical workflow steps.

On the Workflow page, you create a workflow by listing the involved steps on the lines. Each step consists of a workflow event moderated by event conditions and a workflow response with response options. You define workflow steps by filling fields on workflow lines from fixed lists of event and response values representing scenarios that are supported by the application code.

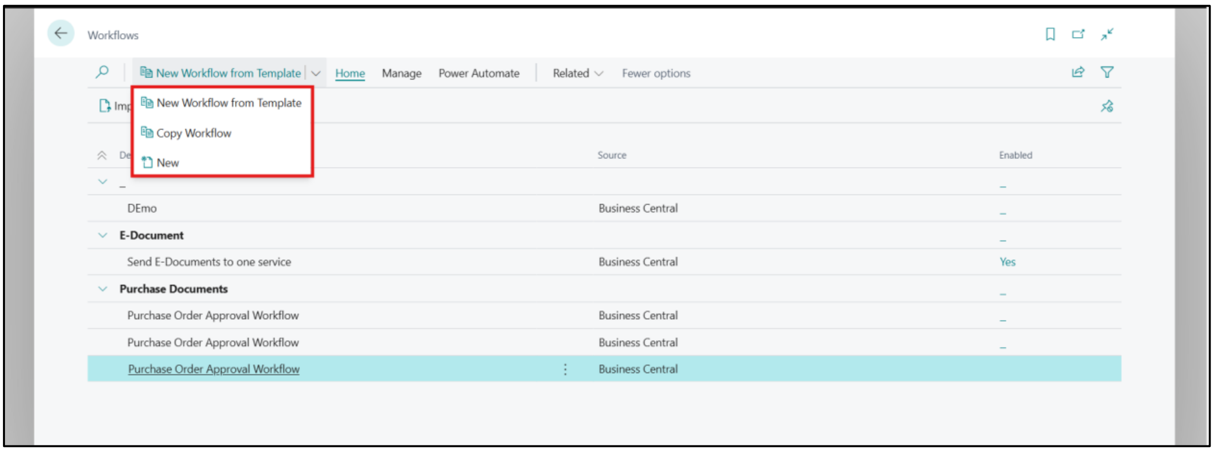
5.1 To create a workflow:

Here we are creating a workflow using Template for **Purchase order Approval**.

I. Open Business Central and Click the **Tell me** icon (magnifying glass in the top-right corner). Or Use (Alt + Q), Enter “**Workflow**” and select related link.



II. User here mainly can see three options for Creating Workflow



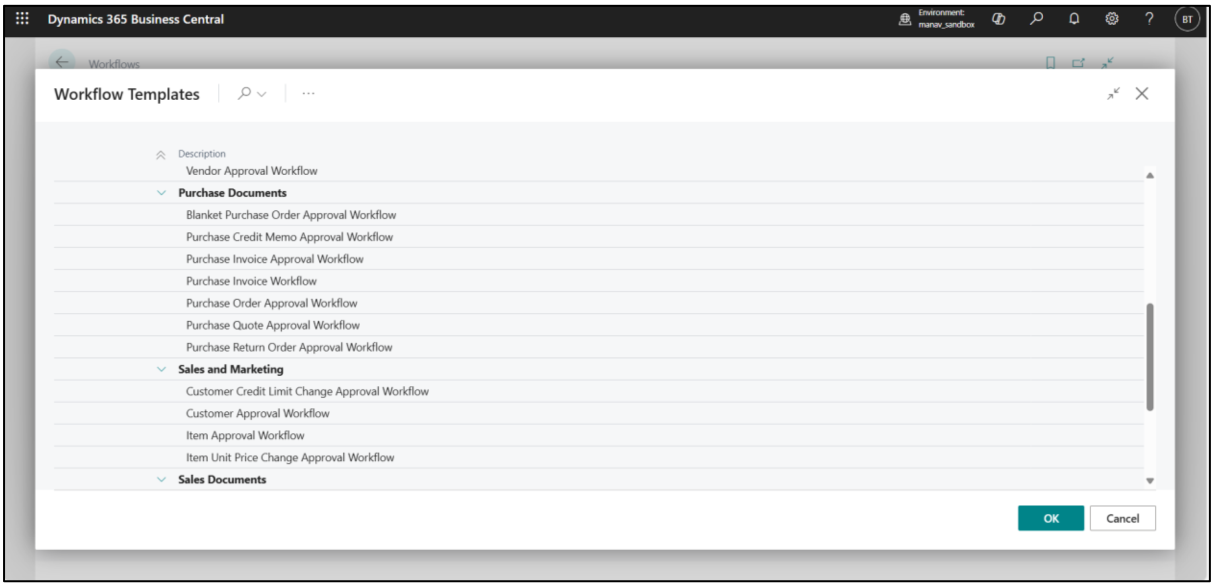
The Table below describes the use of each option:

Option	Description
New Workflow from Template	Use this to quickly create a workflow based on predefined templates (e.g., Purchase Order Approval).
Copy Workflow	Duplicate an existing workflow. Useful when you want to reuse and modify a current workflow.
New	Create a blank workflow from scratch. Gives you full control over events, conditions, and responses.

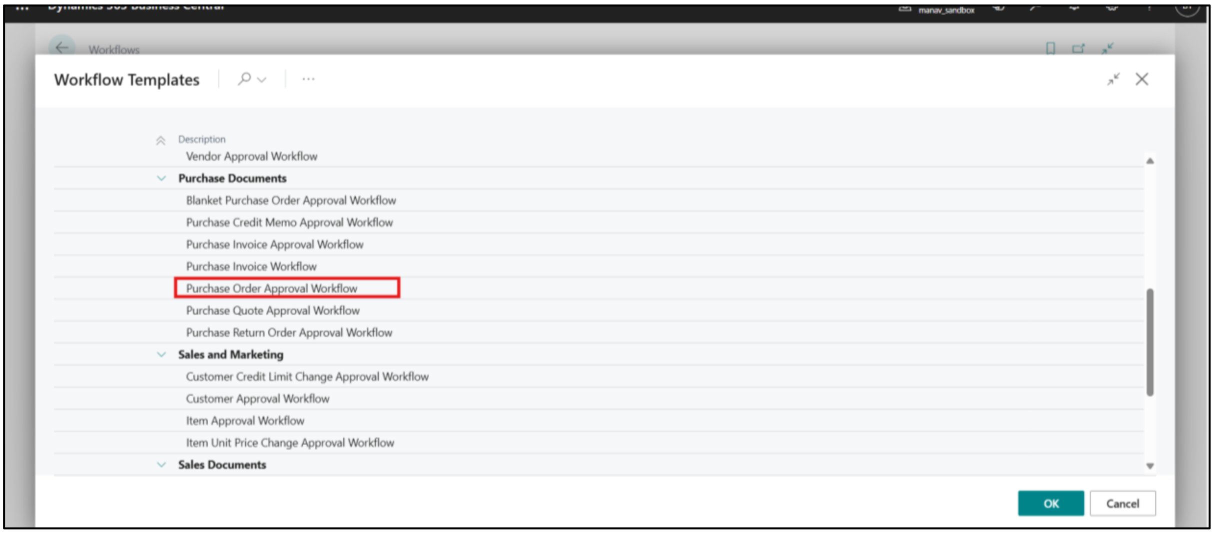
NOTE:

Here we are creating with "**New Workflow from Template**" here we are using "**Purchase order approval**", user can refer Create New Workflow from scratch.

III. Select "**New Workflow from Template**", which opens "**Workflow Templates**"

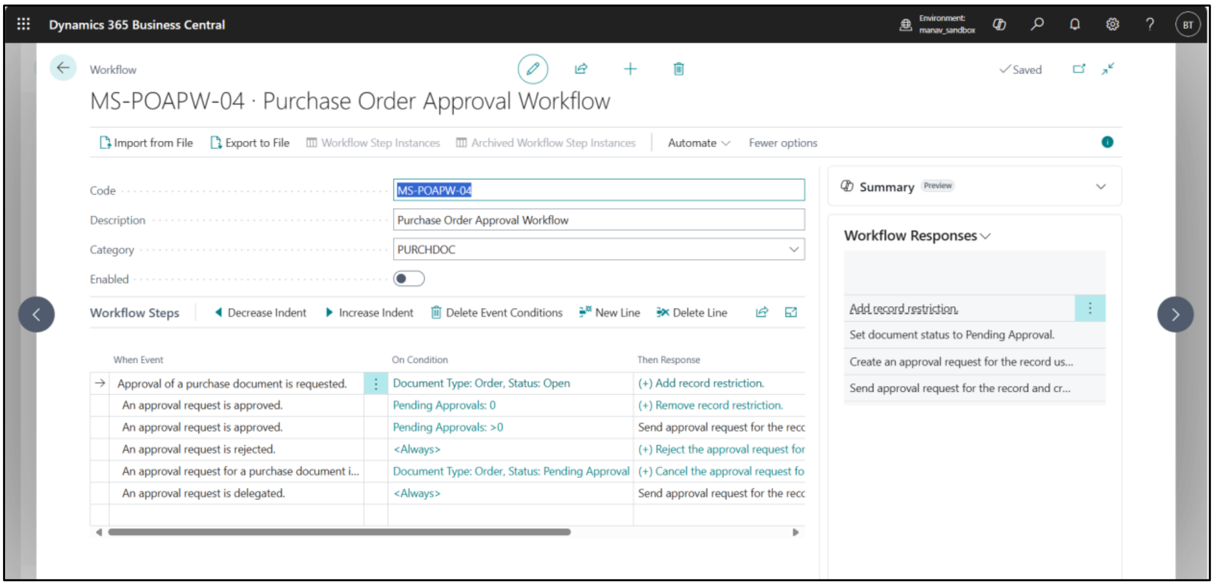


IV. Select a workflow template, then choose OK.



The Workflow page opens for a new workflow containing all the information of the selected template. The value in the Code field is extended with, for example, "-01" to indicate that this is the first workflow created from the workflow template.

V. It opens workflow page with all information of selected Template



Below Table Describes or explains each field:

Field	Description
Code	A unique identifier for the workflow. This helps you distinguish it from other workflows in the system. Example: `MS-POAPW-04`.
Description	A short and clear explanation of what the workflow does. It helps users understand the purpose (e.g., *Purchase Order Approval Workflow*).
Category	Defines the type of record or document the workflow applies to. Example: `PURCHDOC` for purchase-related documents like purchase orders.

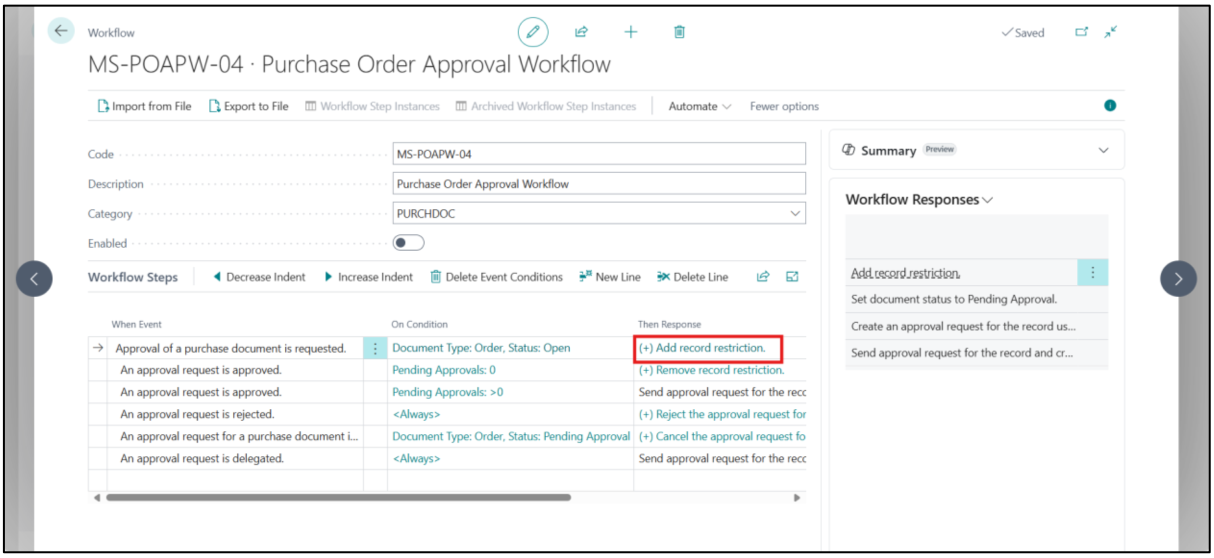
A workflow is divided into three sections:

1. When **Event**
   This is where the trigger is selected.
   Examples of a trigger:
   - A master data record is changed
   - An incoming document is created or released
   - Approval of a document is requested
2. On **Condition**
   The conditions are related to the event and allows creating filters to decide on how the workflow continues.

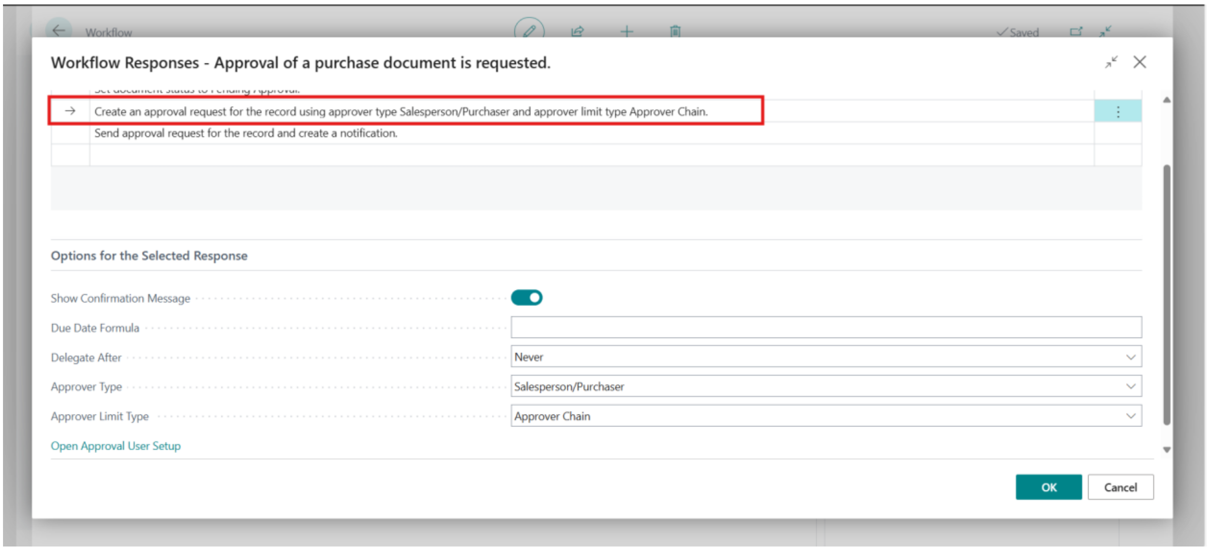
3. Then **Response**
   The responses specify the next steps in the workflow.

The options for events and responses are system-defined. To add new options, you'll need to develop an extension.
To learn more about Event, conditions & Responses refer [Event,Conditions&Responses]

VI. In the "**Then Response**" field, specify the action that should occur when the workflow event is triggered.
When you choose the field, the "**Workflow Responses**" page lists all available workflow responses and response options.
Click on Response:



It shows all available options for the workflow responses and response options:

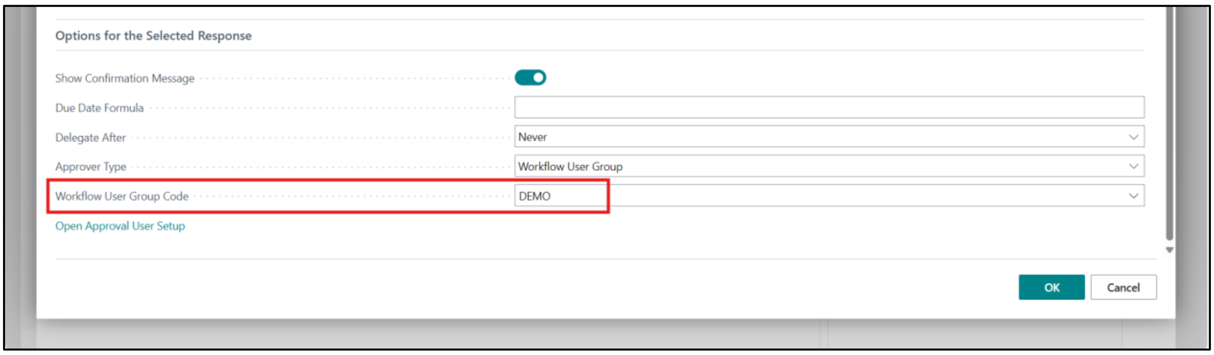


Workflow Options for each response varies, hence based on the Workflow type you need, add the response based on it.

Below Table Describes each field:

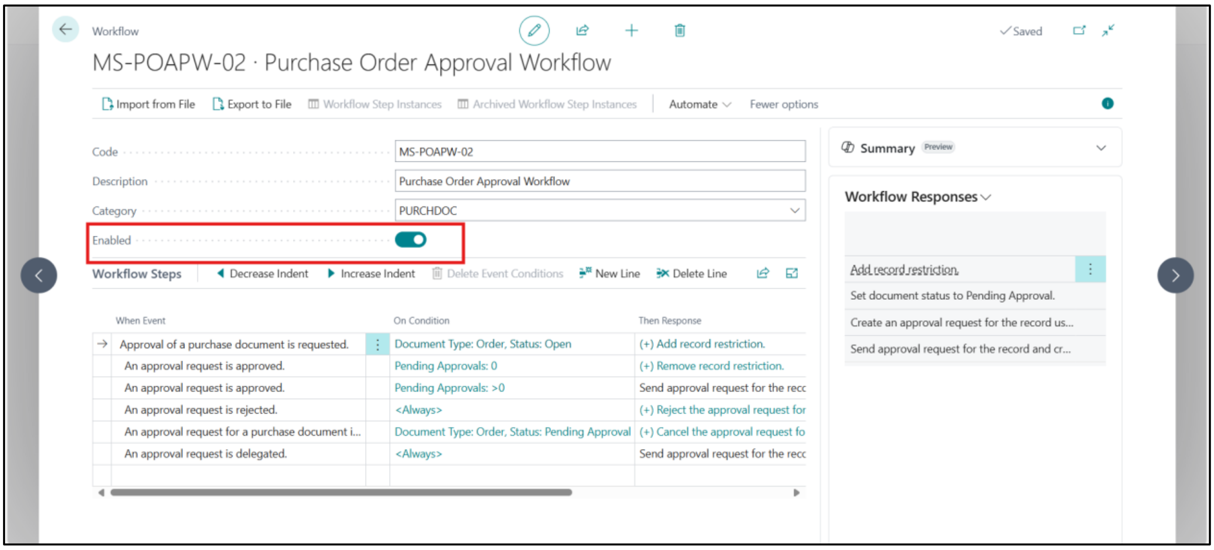
Field	Description
Due Date Formula	Specify the number of days the approver has to resolve the request. The period starts when the request is sent. Values can be: 1D, 1M, 1Y etc.
Delegate After	Specify if and when an approval request is automatically delegated to the substitute. You can select to automatically delegate one, two, or five days after the date when the approval was requested.
Approver Type	Specify who the approver is, according to the setup of approval users and workflow users. • Salesperson/Purchaser, the user specified in the Salesperson/Purch. Code field on the Approval User Setup page determines the approver. • Approver: Follows the flow defined on the Approval user setup • Workflow User Groups: Flow defined on the Workflow user group page.
Show Confirmation Message	Specify whether to show a confirmation message after a user requests an approval.
Approver Limit Type	Specify the effect of limits for approvers. An approver's approval limit must be above the value on the request. Options include: • Approver Chain – Approval entries created for all approvers up to and including the first qualified approver. • Direct Approver – Entry created only for the requester's immediate approver. • First Qualified Approver – Entry created only for the first approver with sufficient limit. • Specific Approver – Notify the user specified in the Approver ID field.

VII. When user select Approver Type as "**Workflow user group**", the field below changes to "**Workflow user group code**"



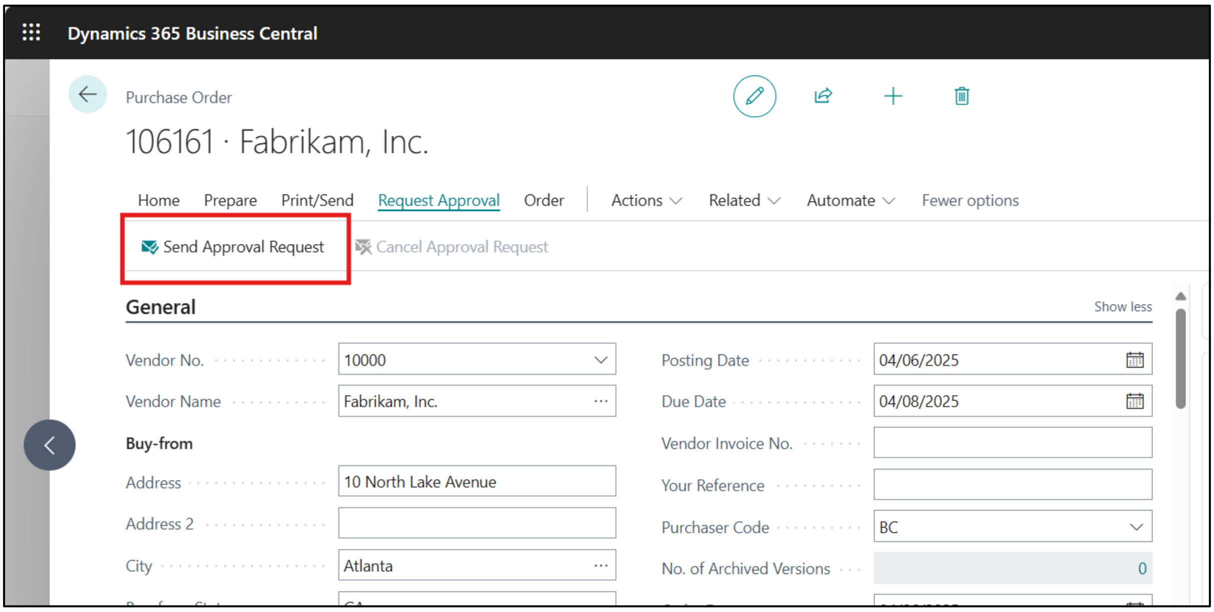
VIII. After Adding required Configuration, click on OK to save.

IX. Then on the "**Enable**" Boolean to enable the workflow.



Hence, as workflow is enabled whenever the user exceeds the "purchase amount approval limit" defined on the "**approval user setup**", User needs to send approval request before posting, similarly if the approver type is "workflow user group" then everytime before posting user needs to take approval (depends on the hierarchy).

X. Approval requests are sent through "**Send approval request**"



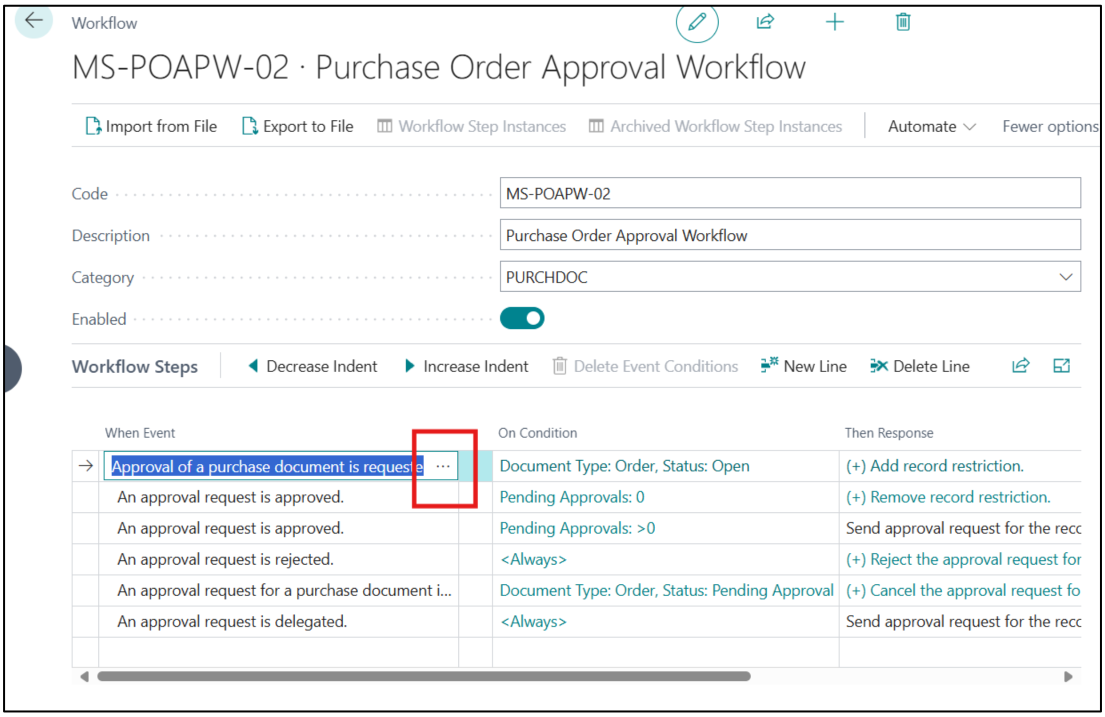
All Approval request entries are available in "**Approval request entries**" and all requests to approve are available on "**requests to approve**" page.

5.2 Event, conditions & Responses:

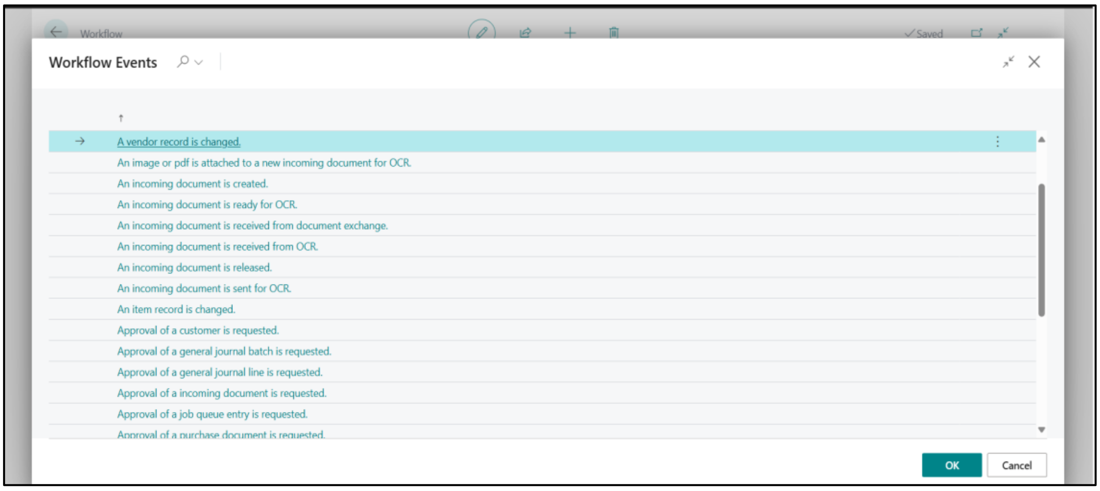
Here's a structured explanation of Event, Condition, and Response:

- **Event**:
  An Event is a trigger that initiates a workflow. It defines when a workflow should start. Events are based on specific actions or changes that occur within Business Central.

  - Open Business Central and search "**workflow**" and then choose the related link and on the list page select any workflow.
  - Now, on the workflow page in Event column click on Assist button.



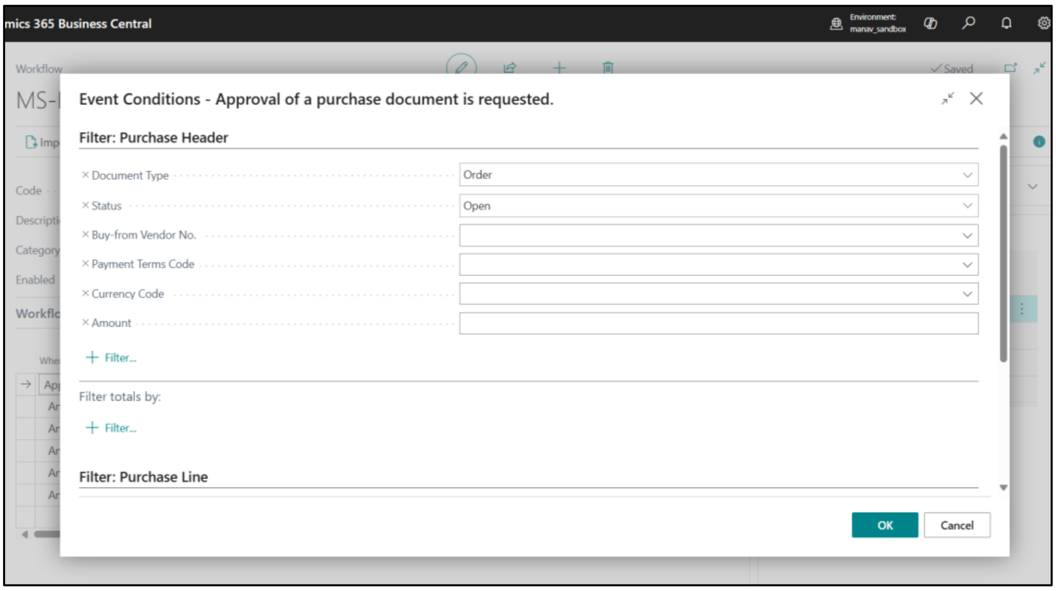
  - When the User clicks on it, it will open a list page of Event which are pre-defined in business central.



- Example Events: A record is created, a field is modified, a document is released etc.

- **Condition**:
  A Condition is a logical check that determines whether the workflow should proceed after the event occurs. It refines the workflow by adding specific requirements that must be met before executing responses.

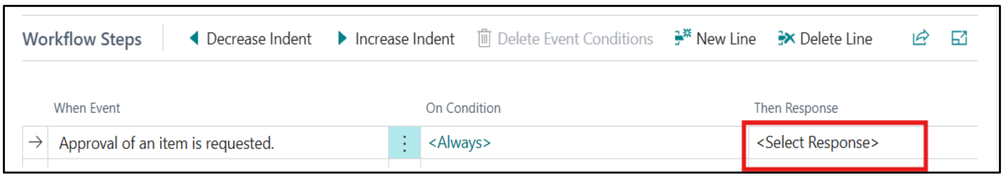
  - Now, on the workflow page in condition column click on Assist button, it will open “**event conditions**” page, where you can define condition.



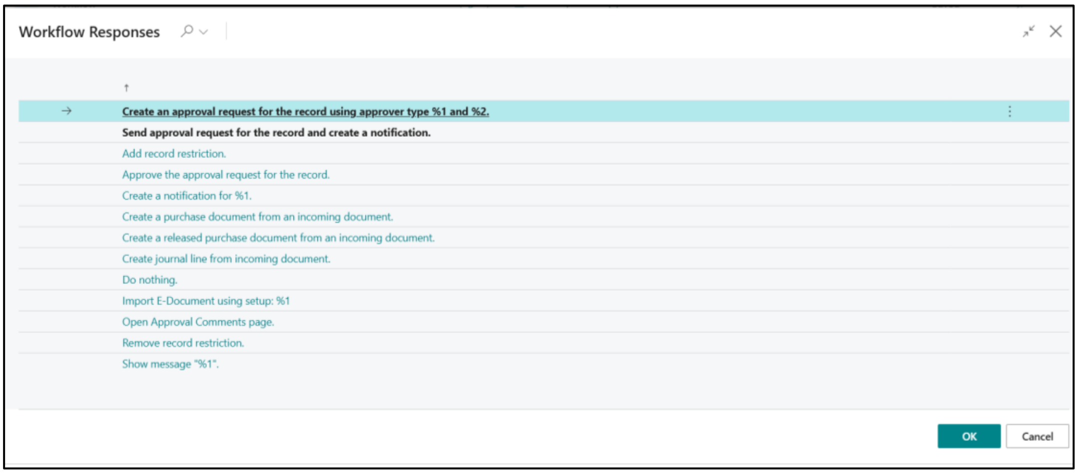
  - So here the condition is Document type should be order and status should be open, hence if condition matches the event will get triggered.
  - The Conditions varies based on the event selected.

- **Responses**:
  A Response is the action taken by the workflow when both the event occurs and the condition is met. Multiple responses can be added to a workflow to handle various scenarios.

  - When User click on <Select Response>, it will open “**workflow responses**” request page.



- Here is the “**workflow responses**” page

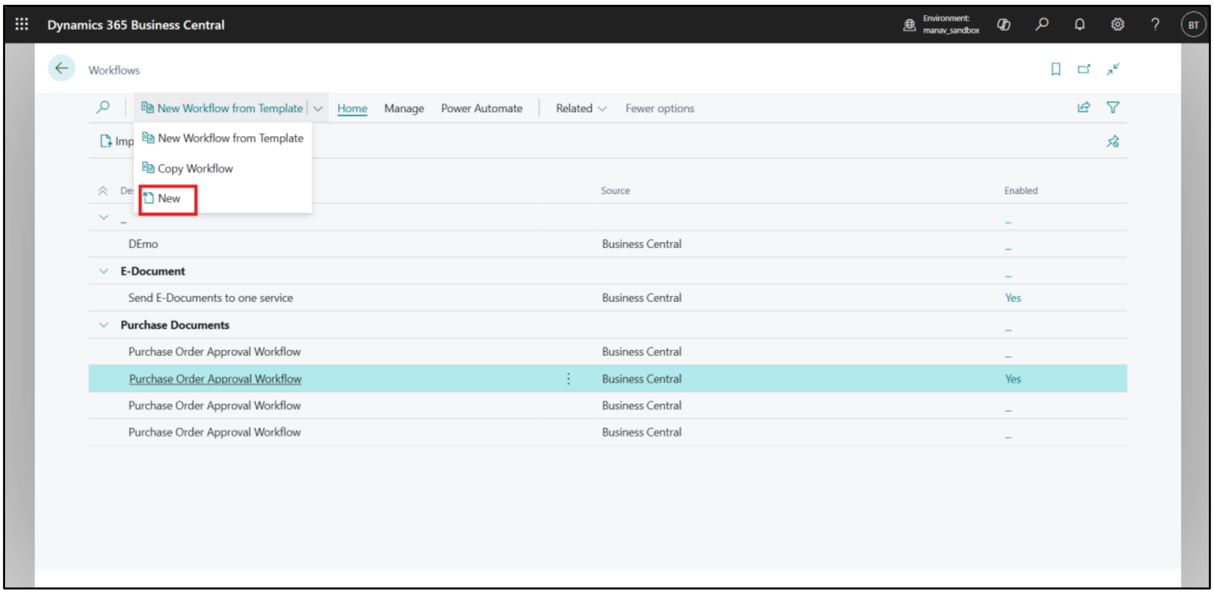


- The page includes all available responses pre-defined in the business central, custom responses can be added through al coding.

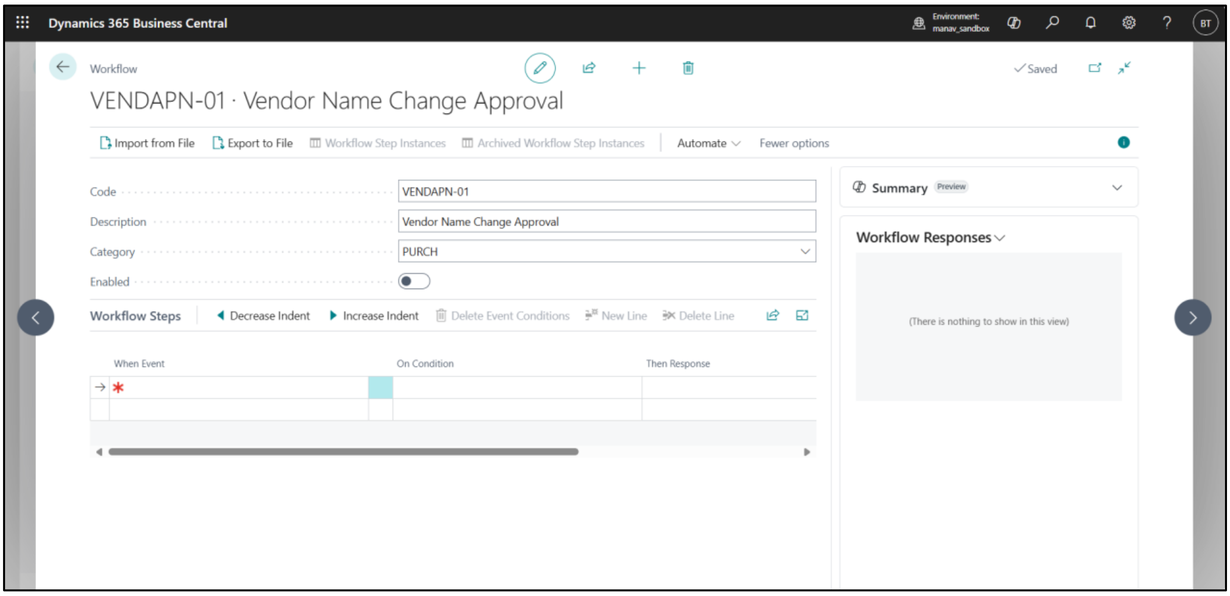
6. Create new Workflow from Scratch:

Here are steps to create from scratch:

I. Open Business Central and Click the **Tell me** icon (magnifying glass in the top-right corner). Or Use (Alt + Q), Enter "**Workflow**" and select related link.
II. Then click on "**New**"

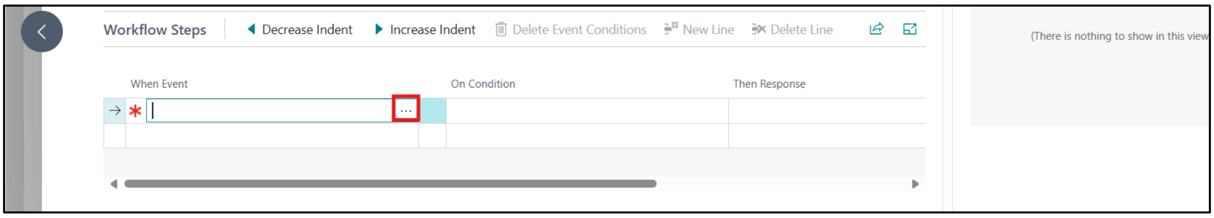


III. In the **Code** field, enter a maximum of 20 characters to identify the workflow.
IV. In the **Description** field, describe the workflow.
V. In the **Category** field, specify which category the workflow belongs to, as shown.

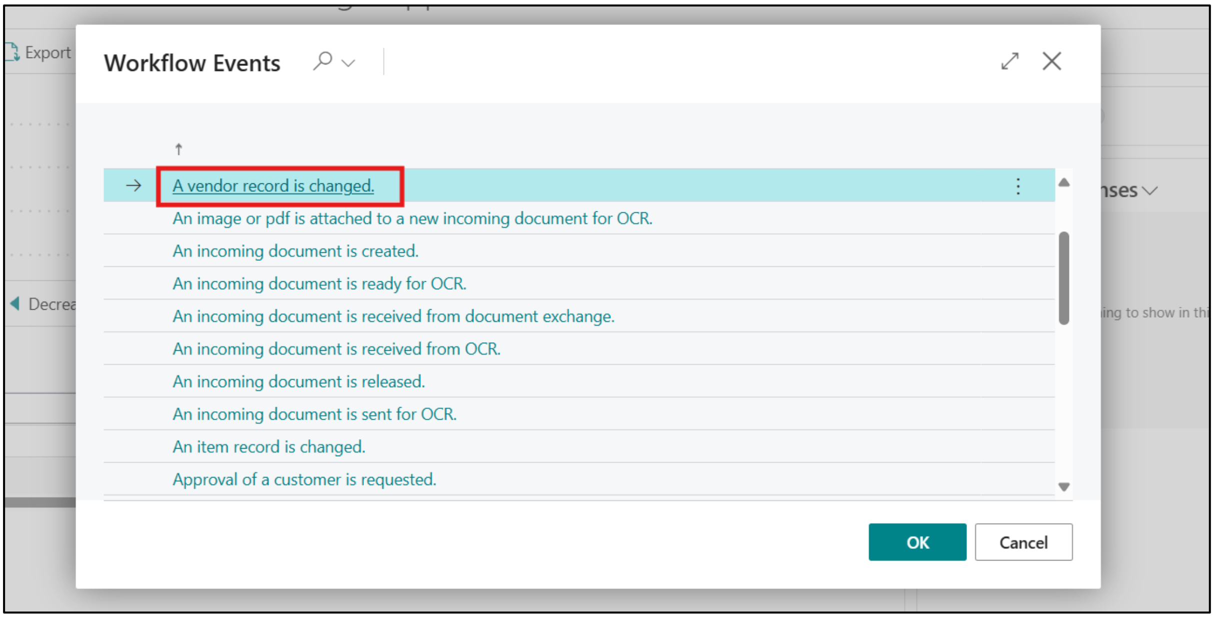


Hence, in this case, we are creating an approval workflow that triggers an approval request whenever the Vendor Name is modified.

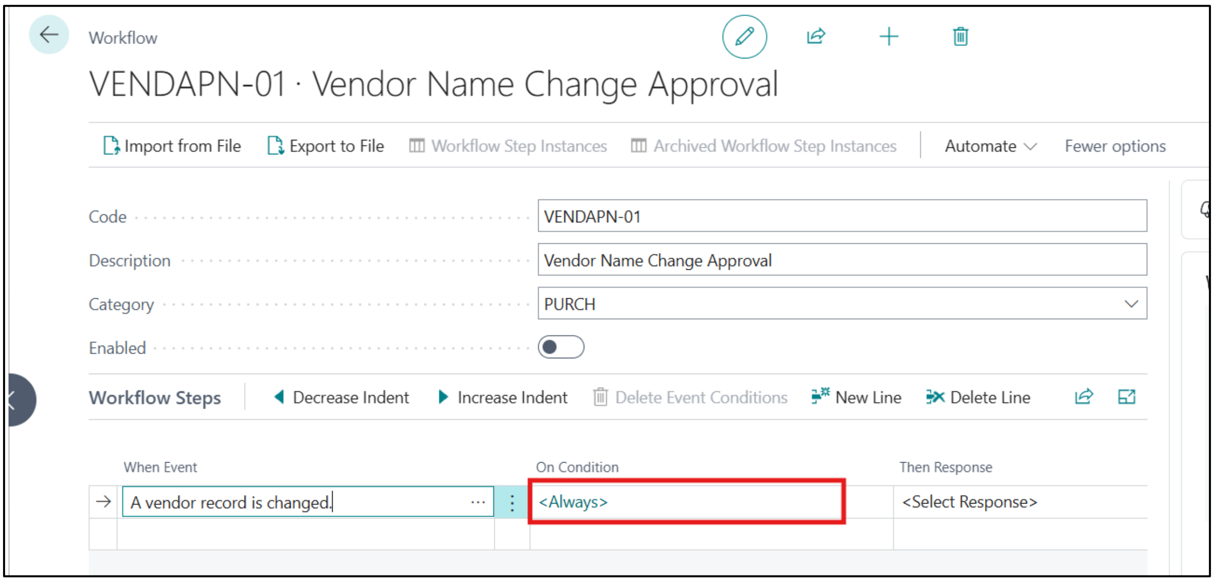
VI. Click on Assist button, which will open Workflow event page.

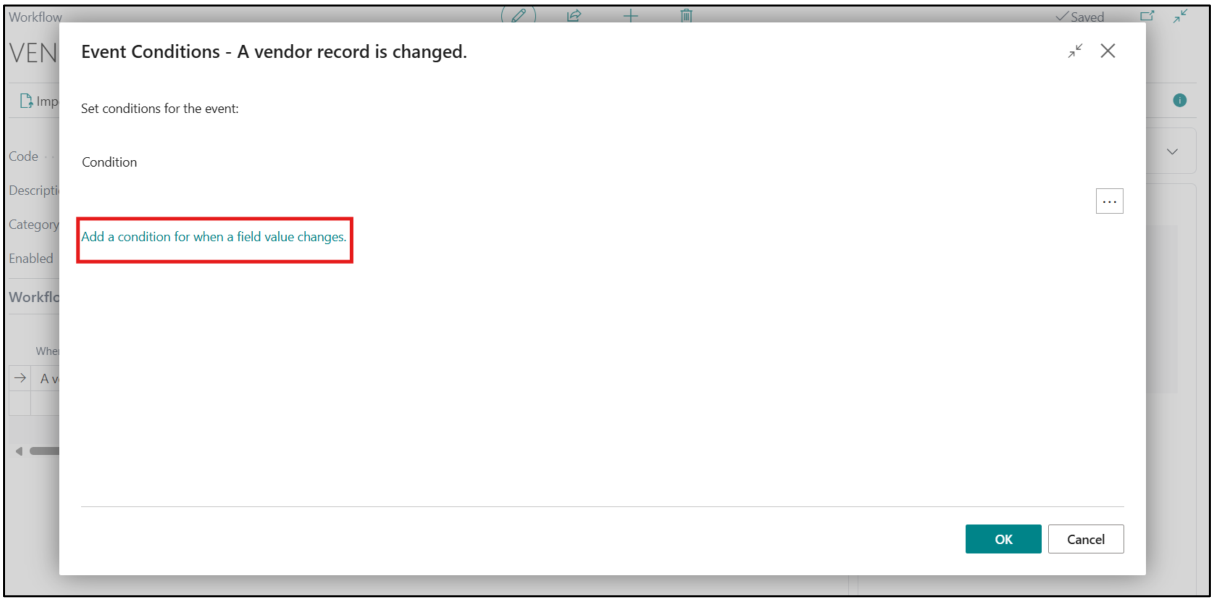


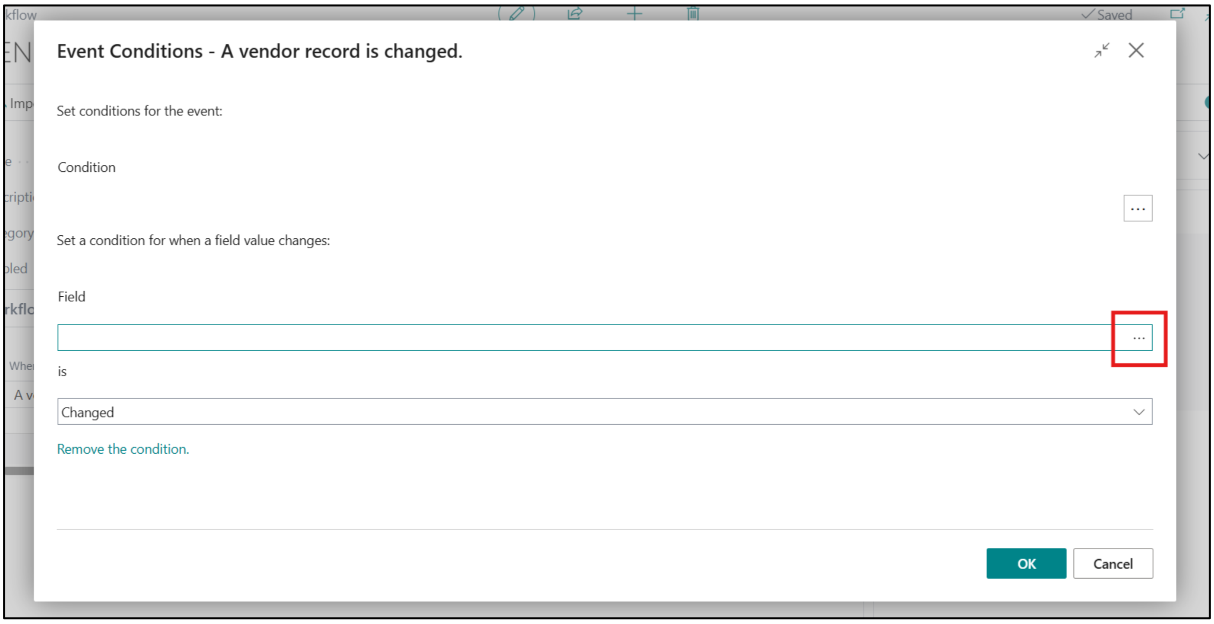
VII. In the "**When Event**" field, specify A vendor record is changed.

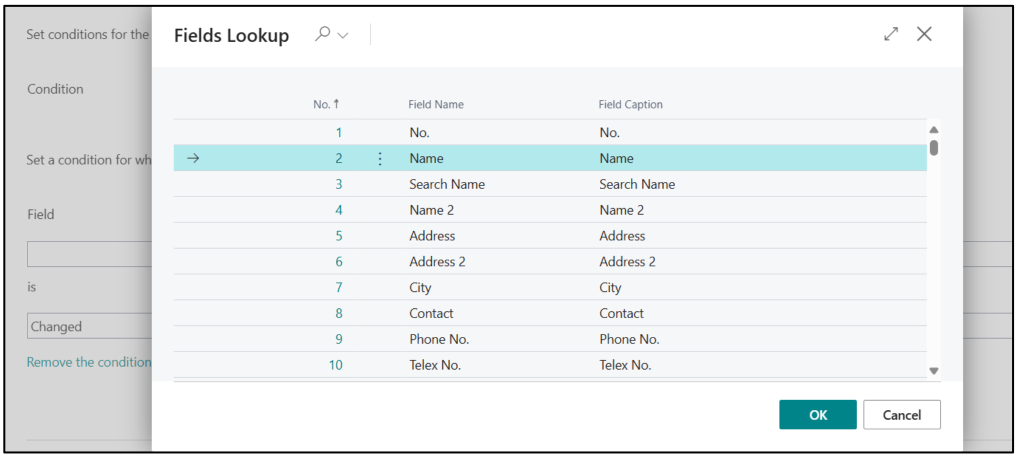


VIII. In the On Condition field, choose the word "**Always**". Then, on the Event Conditions page, choose the "**Add a condition for when a field value changes**" link, then select the Name field. The result of this step is that the condition reads as Name Is Changed.

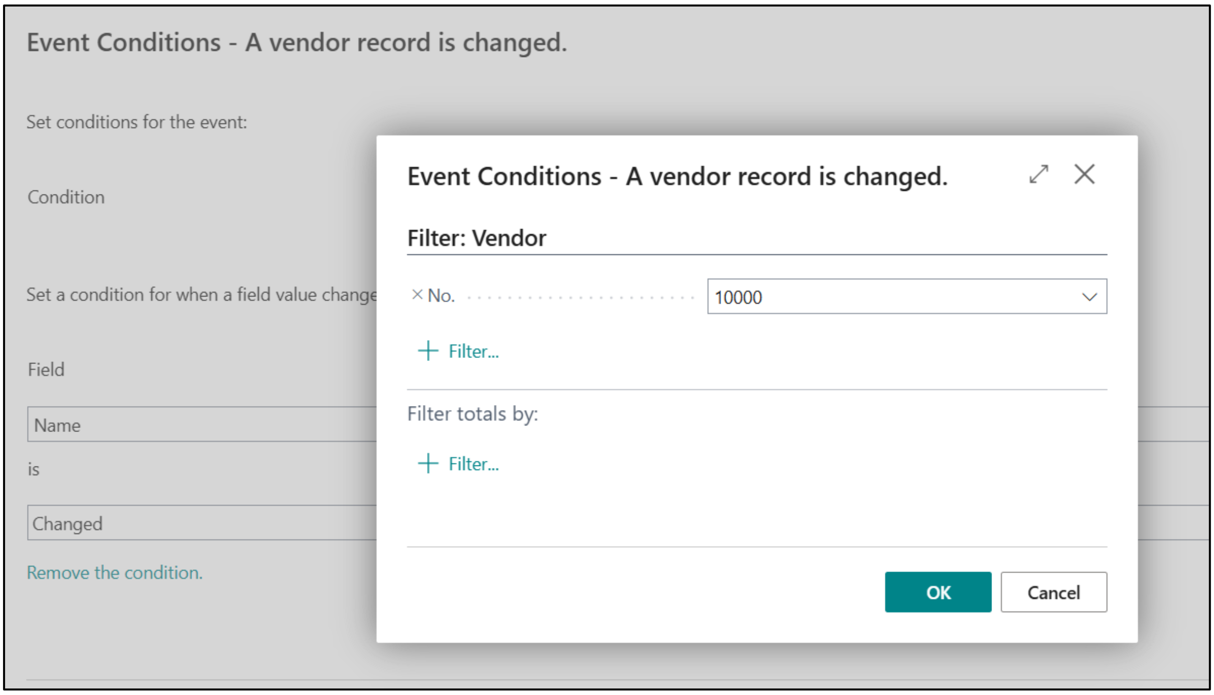



Event Conditions - A vendor record is changed.
Set conditions for the event:
Condition
Add a condition for when a field value changes.
OK
Cancel


Event Conditions - A vendor record is changed.
Set conditions for the event:
Condition
Set a condition for when a field value changes:
Field
is
Changed
Remove the condition.
OK
Cancel

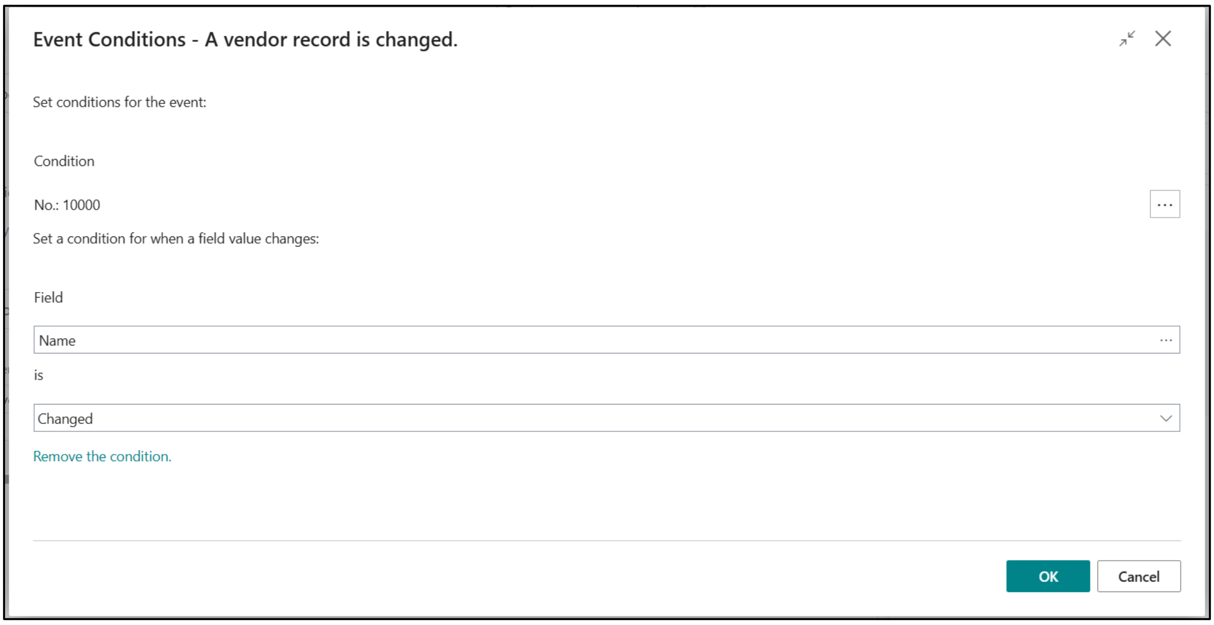

Fields Lookup
No.
Field Name
Field Caption
1 No. No.
2 Name Name
3 Search Name Search Name
4 Name 2 Name 2
5 Address Address
6 Address 2 Address 2
7 City City
8 Contact Contact
9 Phone No. Phone No.
10 Telex No. Telex No.
OK
Cancel

IX. User can also set it for specific vendor

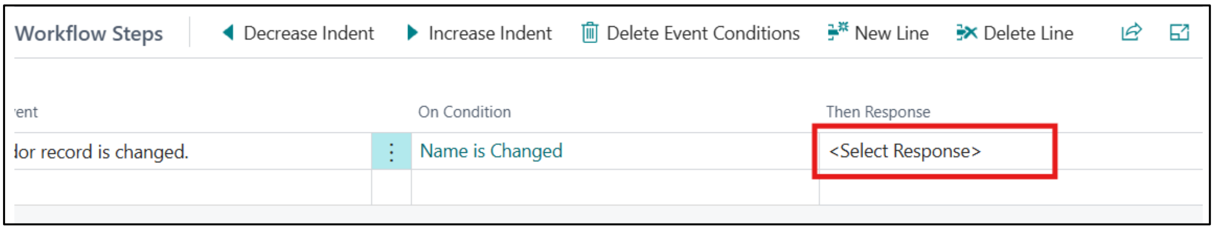


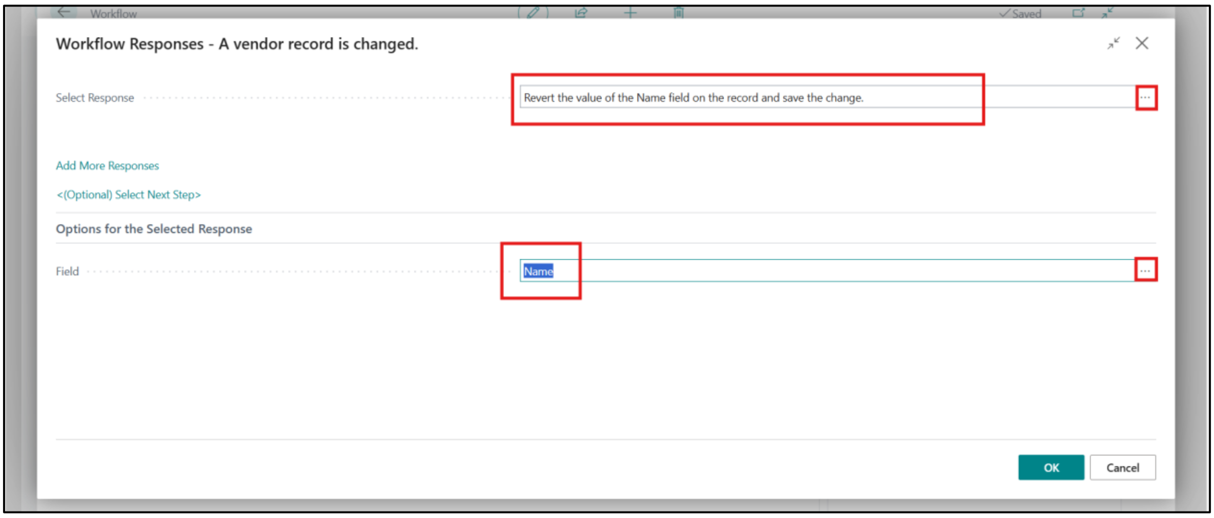
- Hence User can filter it out for specific vendor filter.

X. This is how Event condition page looks like after defining condition. Then Click on “OK”

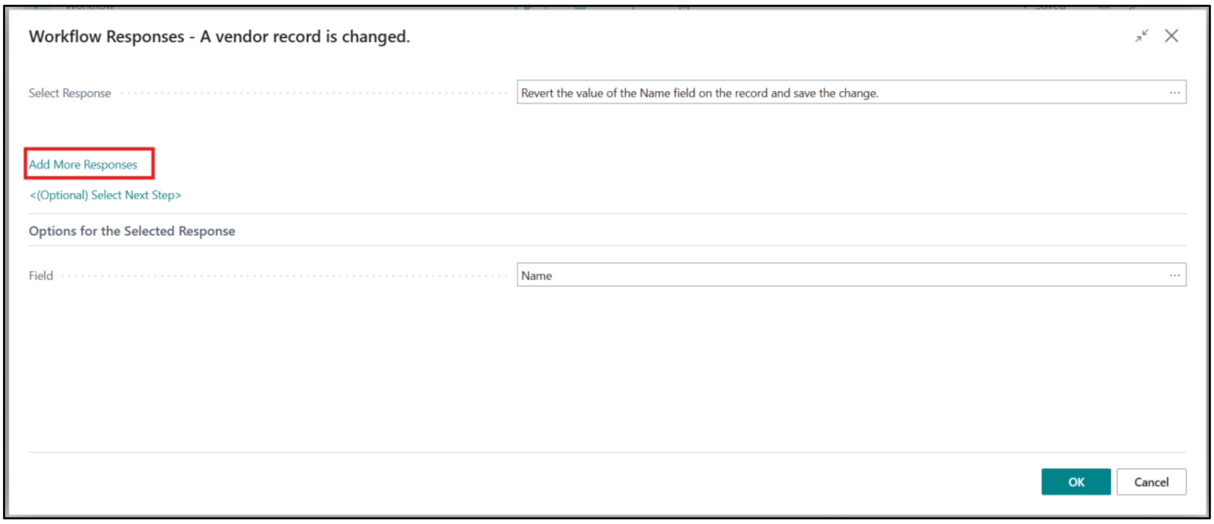


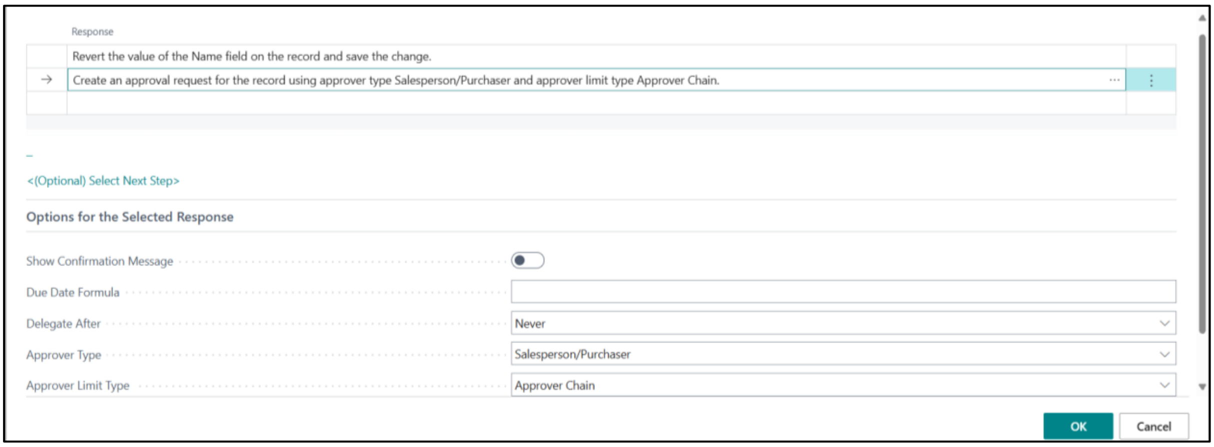
XI. In the Then Response field, choose the Select Response link. Then, on the Workflow Responses page, in the Select Response field, choose the Revert the value of the <Field> field on the record and save the change response. Then, in the Options for the Selected Response section, specify the Name field.



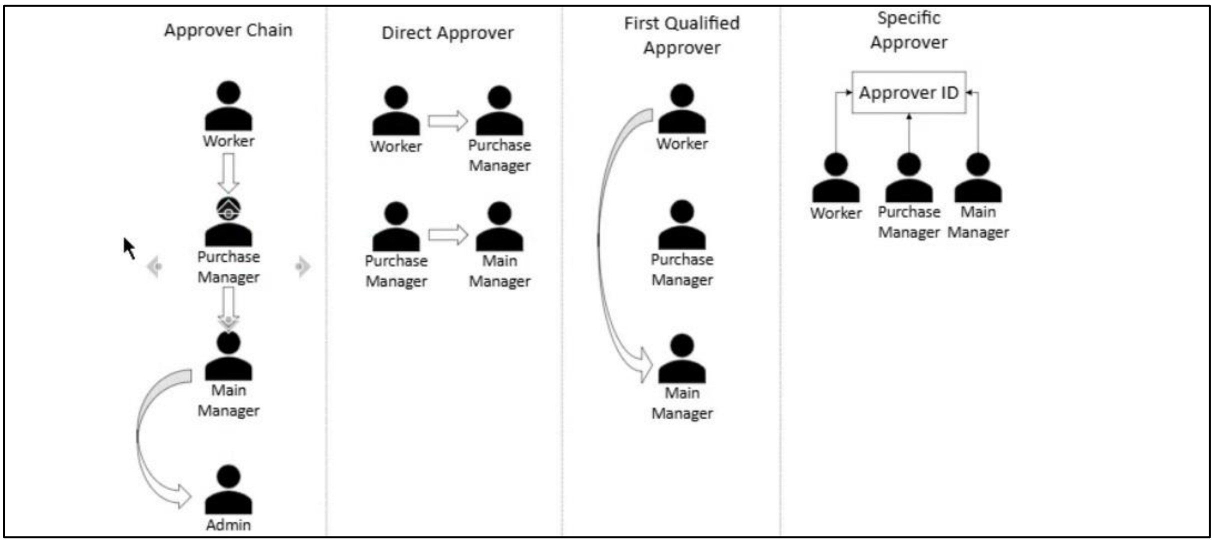


XII. Choose the Add More Responses link, then add an entry for the **Create an approval request for the record using approver type <%1> and <%2>** response.

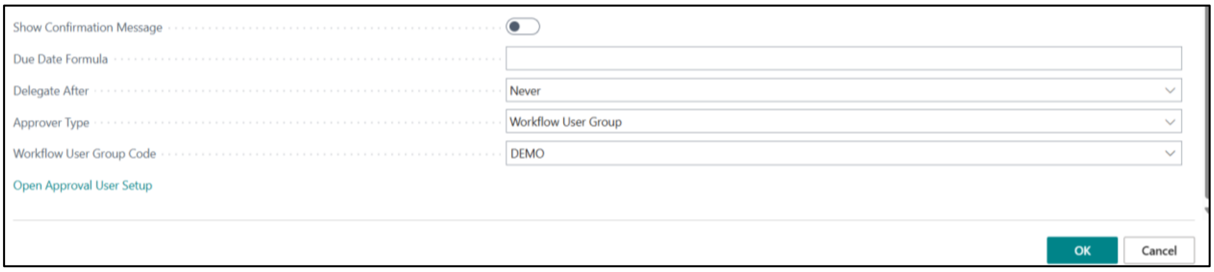




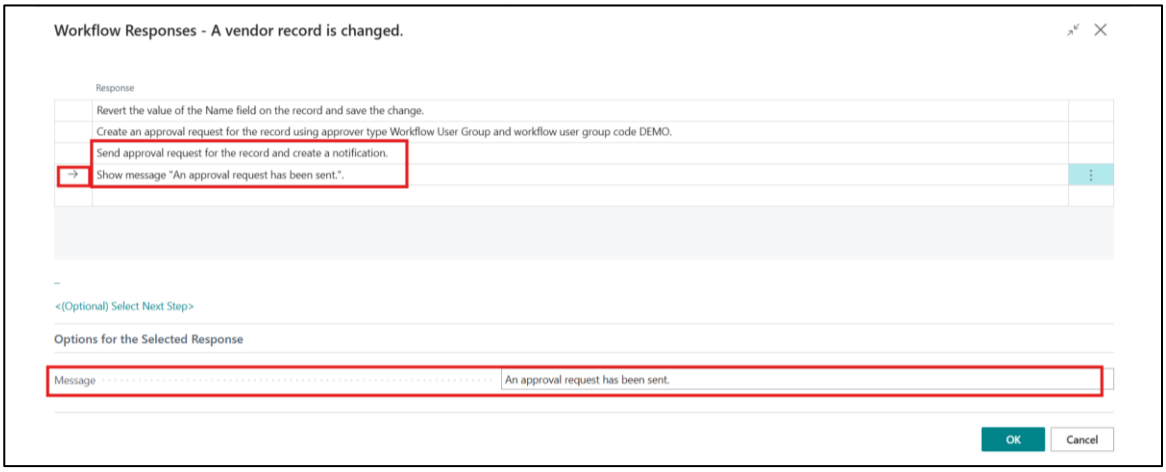
- Refer the image shown below for understanding different methods of "**Approver limit type**".



XIII. In the Options for the Selected Response section for the new response, change the Approver type field to **Workflow User Group**. Then, in the Workflow User Group field, specify the user group.

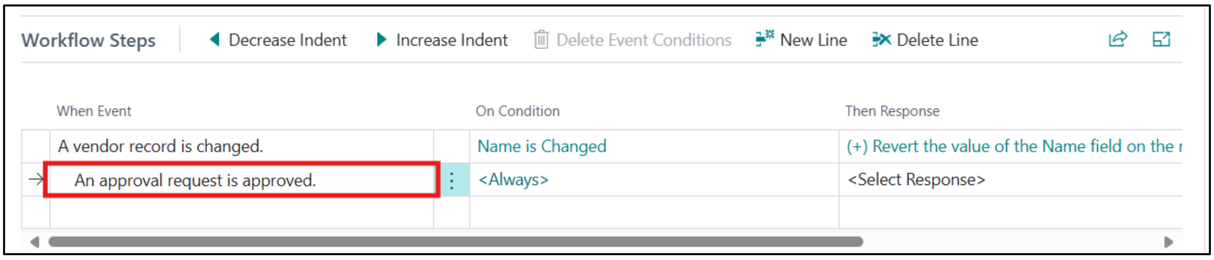


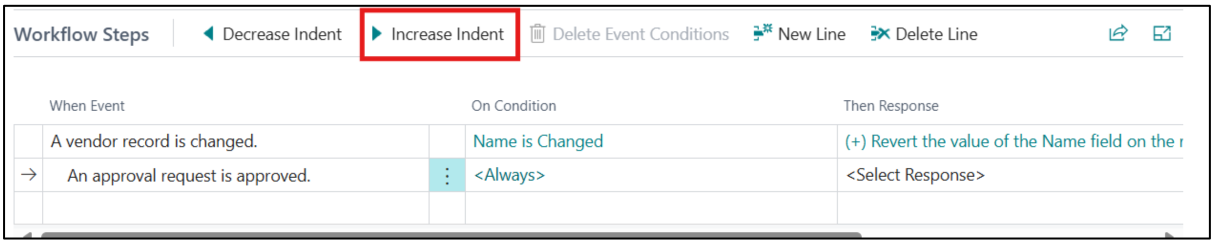
XIV. In the third and fourth response, add "**Send approval request for the record and create a notification**" and "Show message "%1"". Add message in the "message" field in the options of the fourth response added. Click OK after finishing.

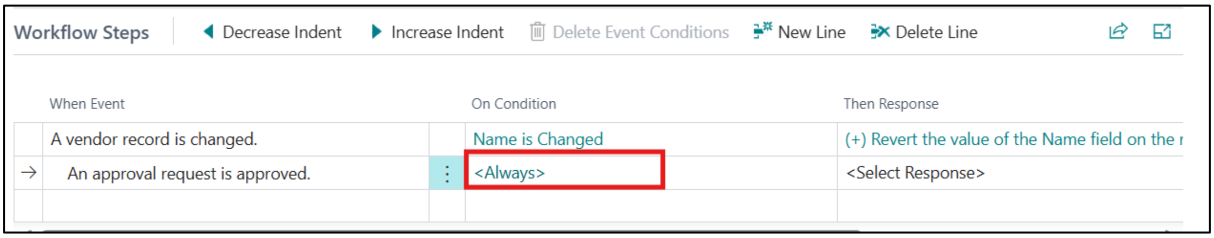


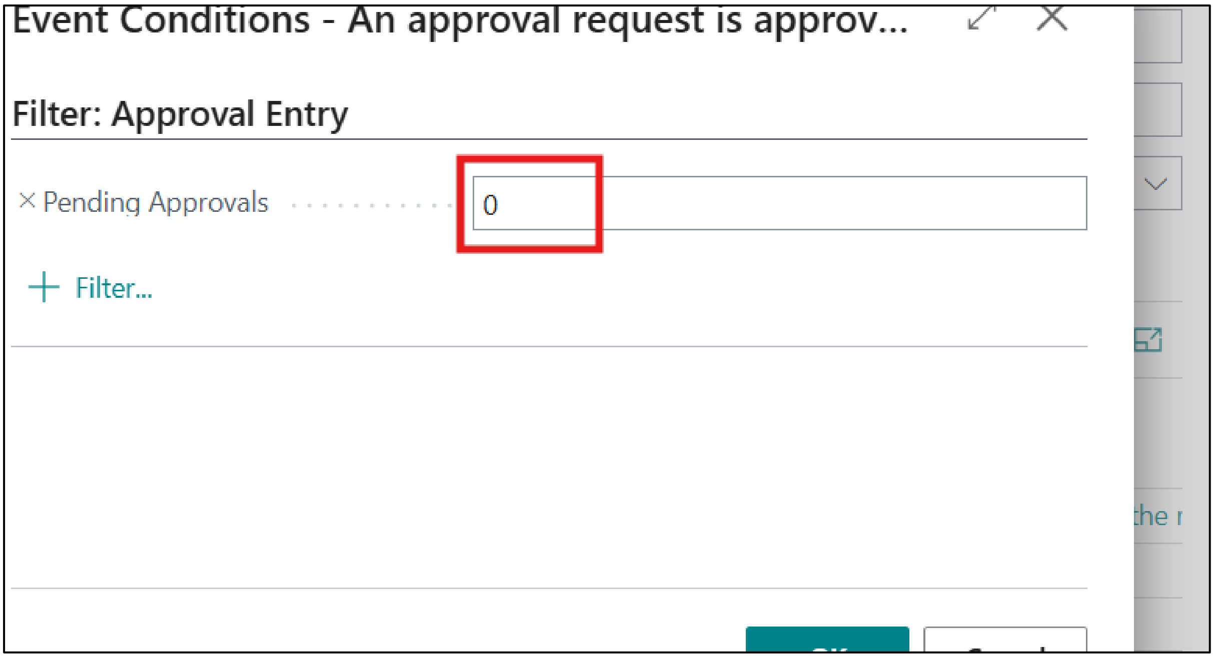
XV. In the next line, add a new workflow step for the "**An approval request is approved**" event.

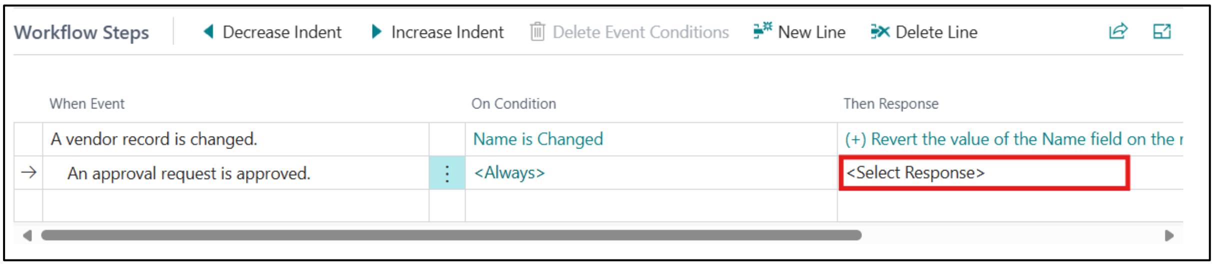
- Action: Choose Increase Indent (to nest this under a parent step)
- On Condition: Click on "**Always**", add Pending approval=0.
- Add Response "**Apply new Values**".

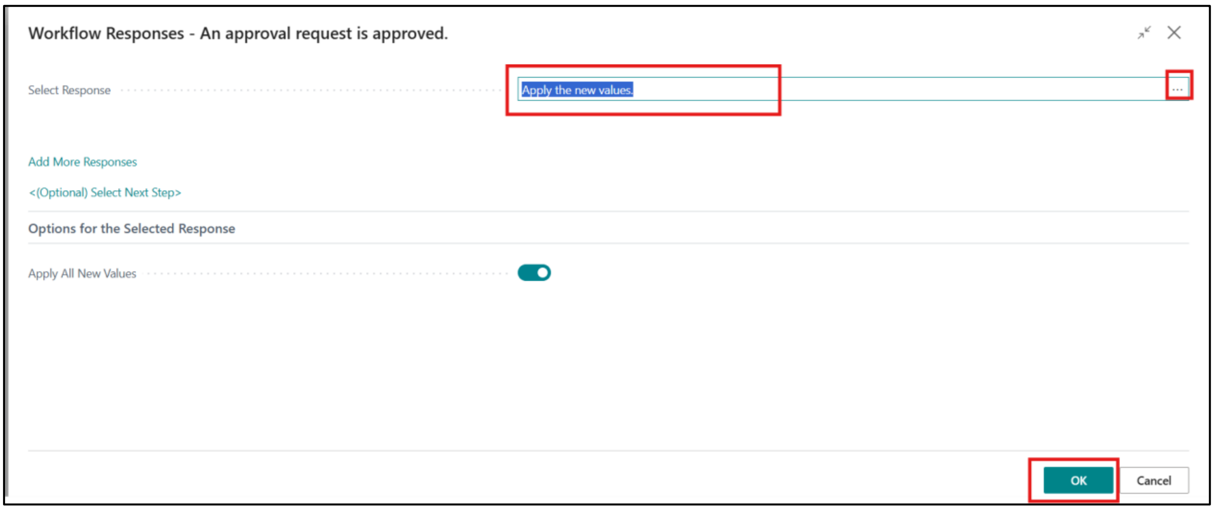


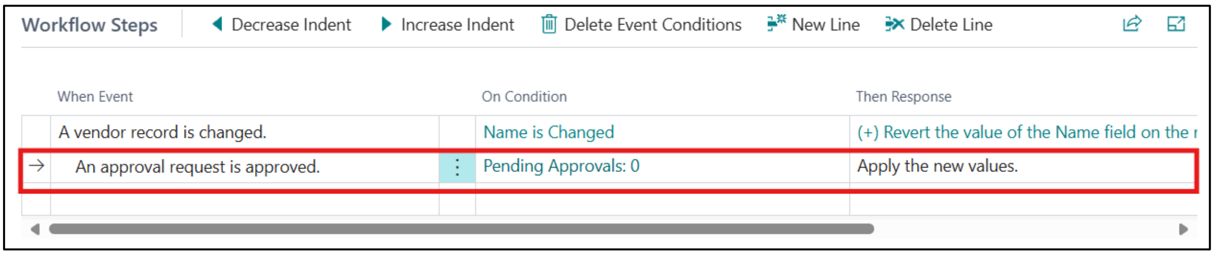






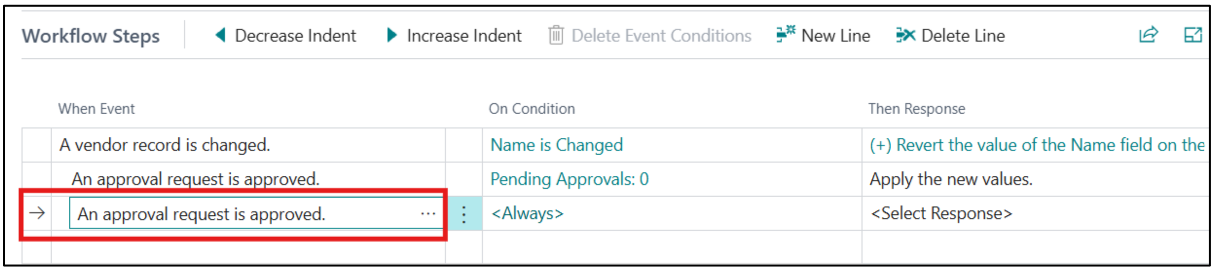


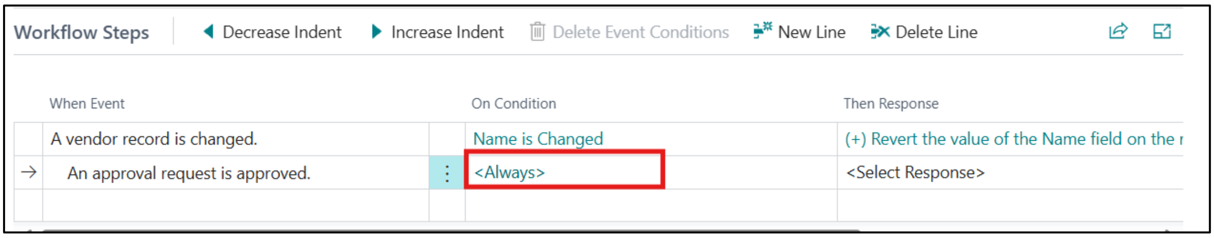


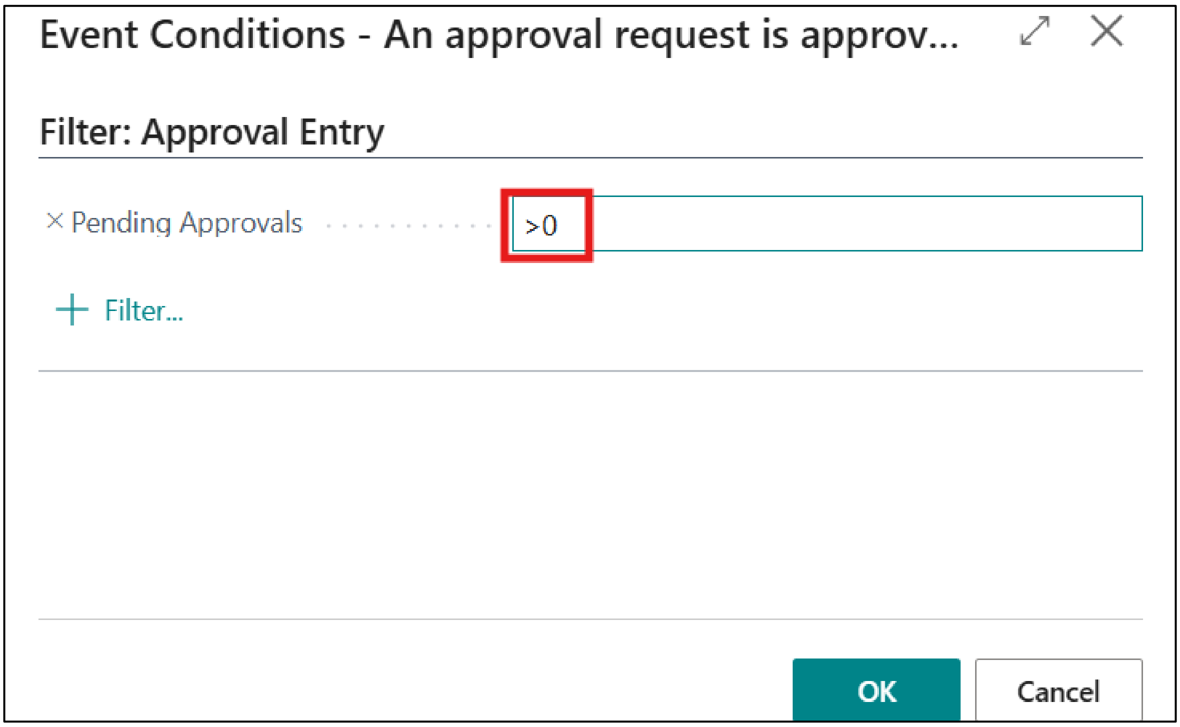


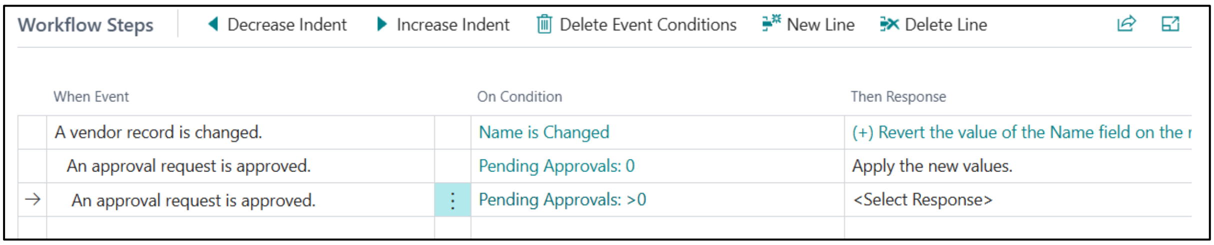
XVI. In the next line, add a second workflow step for the "**An approval request is approved**" event.

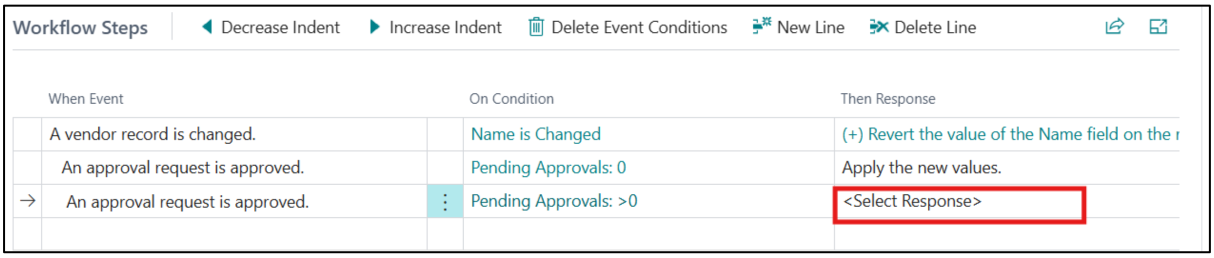
- Action: (No indent change – keep at current level).
- On Condition: Click on "**Always**", add Pending Approvals > 0.
- Then Response: Add response "**Send approval request for the record and create a notification**".

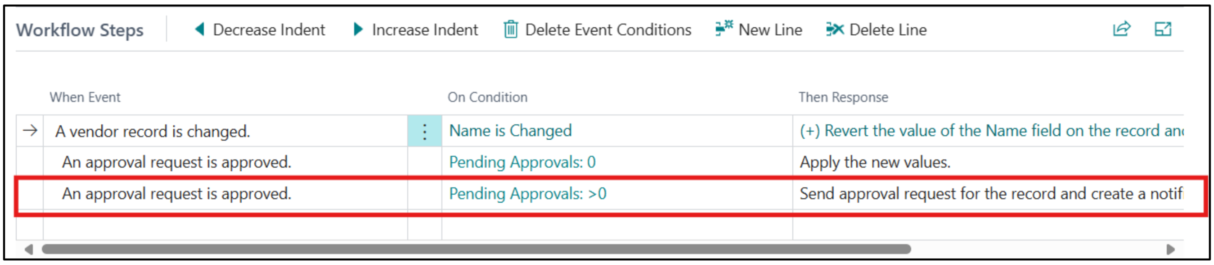



Workflow Steps
Decrease Indent
Increase Indent
Delete Event Conditions
New Line
Delete Line
When Event
On Condition
Then Response
A vendor record is changed.
Name is Changed
(+) Revert the value of the Name field on the r
An approval request is approved.
<Always>
<Select Response>


Event Conditions - An approval request is approv...
Filter: Approval Entry
Pending Approvals
>0
Filter...
OK
Cancel

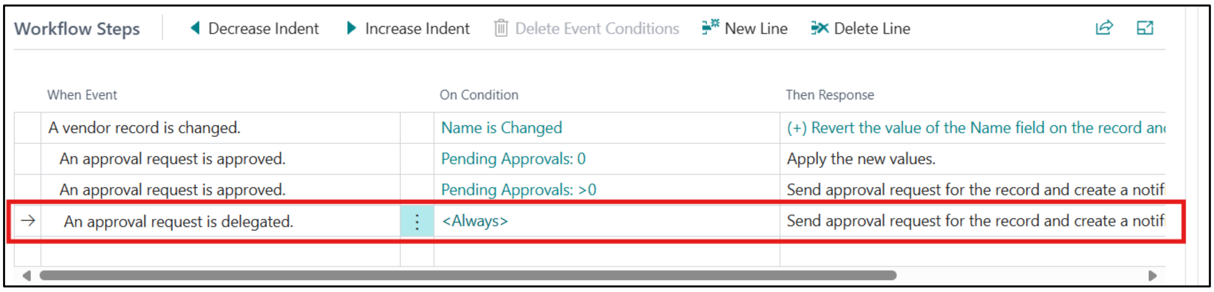

Workflow Steps
Decrease Indent
Increase Indent
Delete Event Conditions
New Line
Delete Line
When Event
On Condition
Then Response
A vendor record is changed.
Name is Changed
(+) Revert the value of the Name field on the r
An approval request is approved.
Pending Approvals: 0
Apply the new values.
An approval request is approved.
Pending Approvals: >0
<Select Response>


Workflow Steps
Decrease Indent
Increase Indent
Delete Event Conditions
New Line
Delete Line
When Event
On Condition
Then Response
A vendor record is changed.
Name is Changed
(+) Revert the value of the Name field on the r
An approval request is approved.
Pending Approvals: 0
Apply the new values.
An approval request is approved.
Pending Approvals: >0
<Select Response>



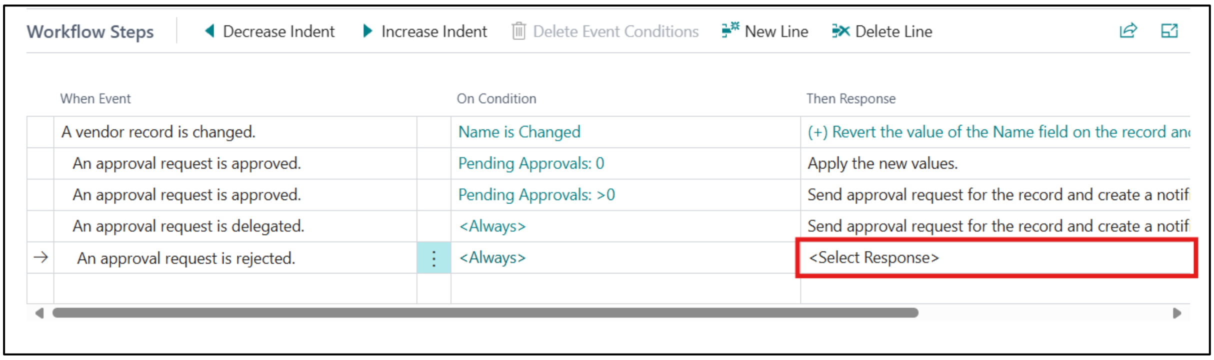
XVII. In the next line, add a workflow step for the "**An approval request is delegated**" event.

- Action: No indent changes i.e. keep at current level.
- On Condition: Leave the value as "**Always**".
- Then Response: Add response "**Send approval request for the record and create a notification**".

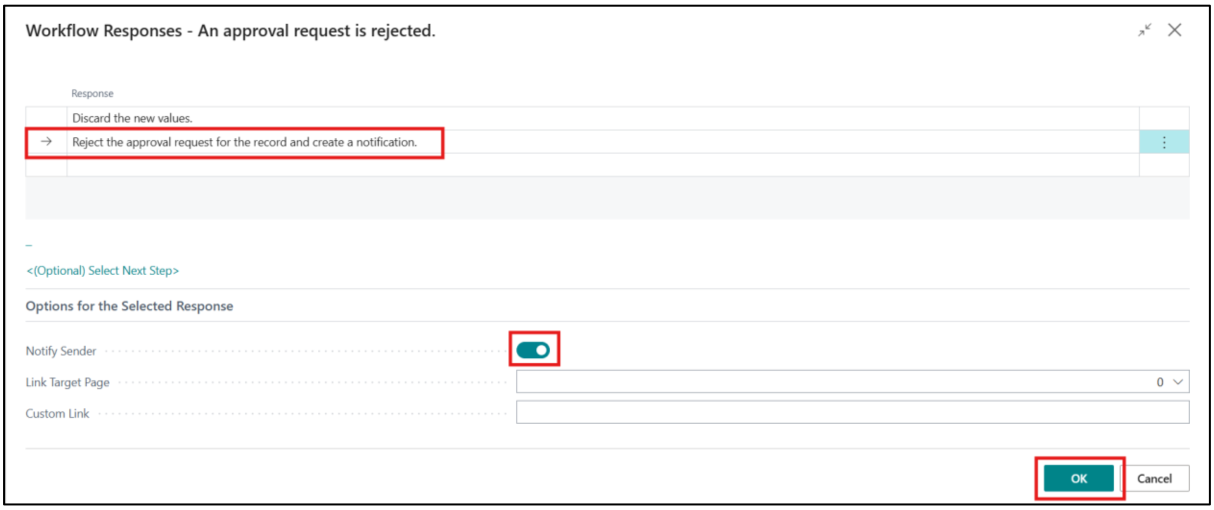


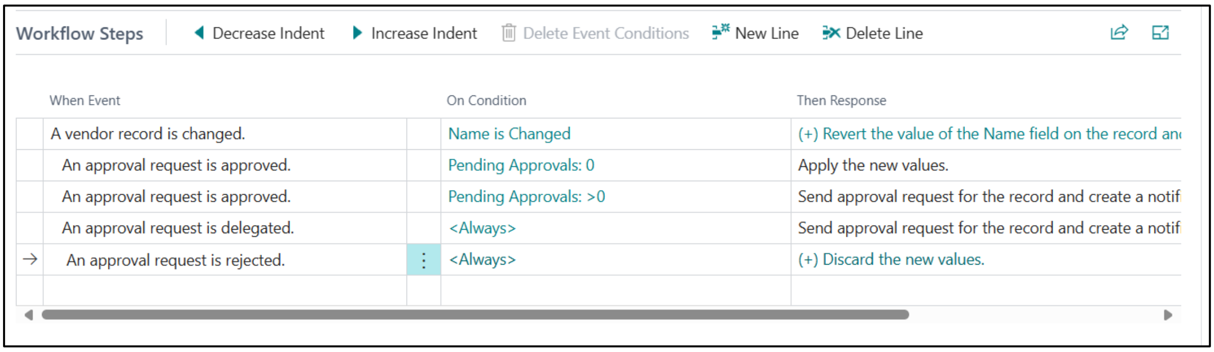
XVIII. In the next line, add a second workflow step for the "**An approval request is rejected**" event.

- Action: No indent changes i.e. keep at current level.
- On Condition: Leave the value as "**Always**".
- Then Response: Add responses "**Discard the new values**" and "**Reject the approval request for the record and create a notification**".

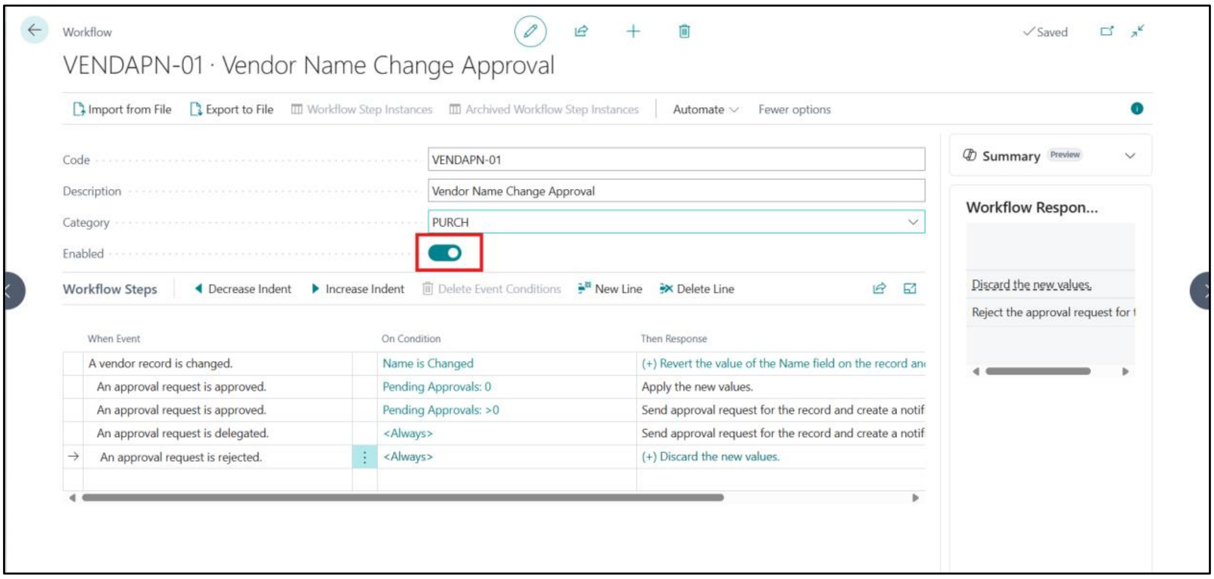


- First Click on Asist, then select "**Discard the new values**" and then click on link "**Add More Responses**".

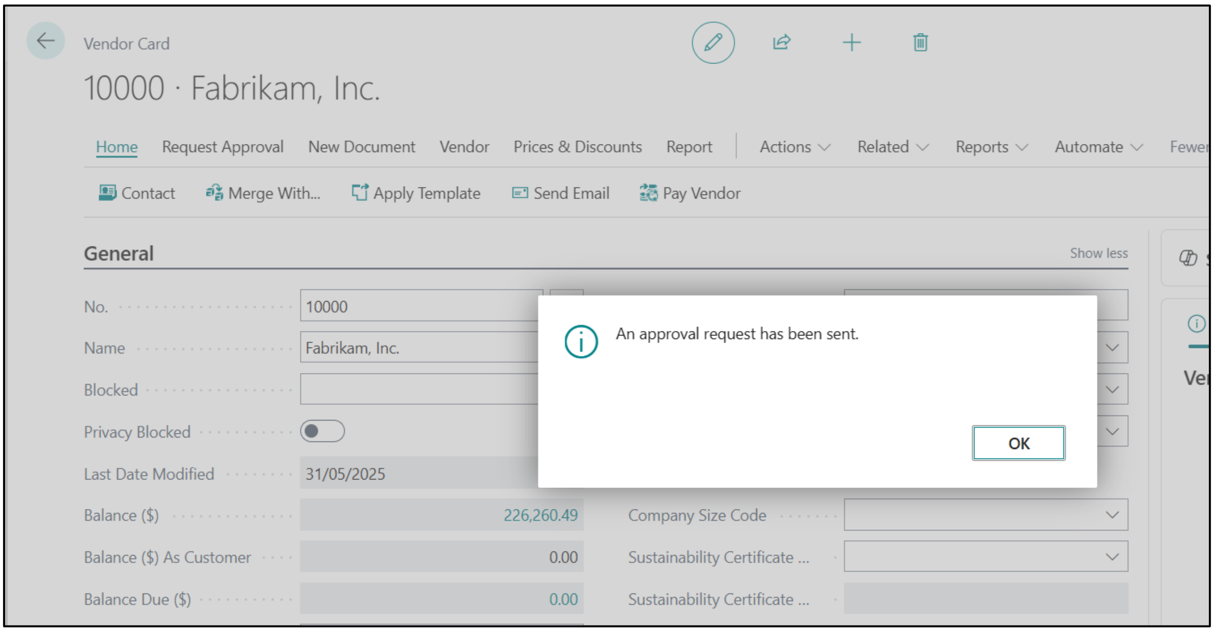




XIX. To enable the workflow, turn on the **Enabled** toggle.

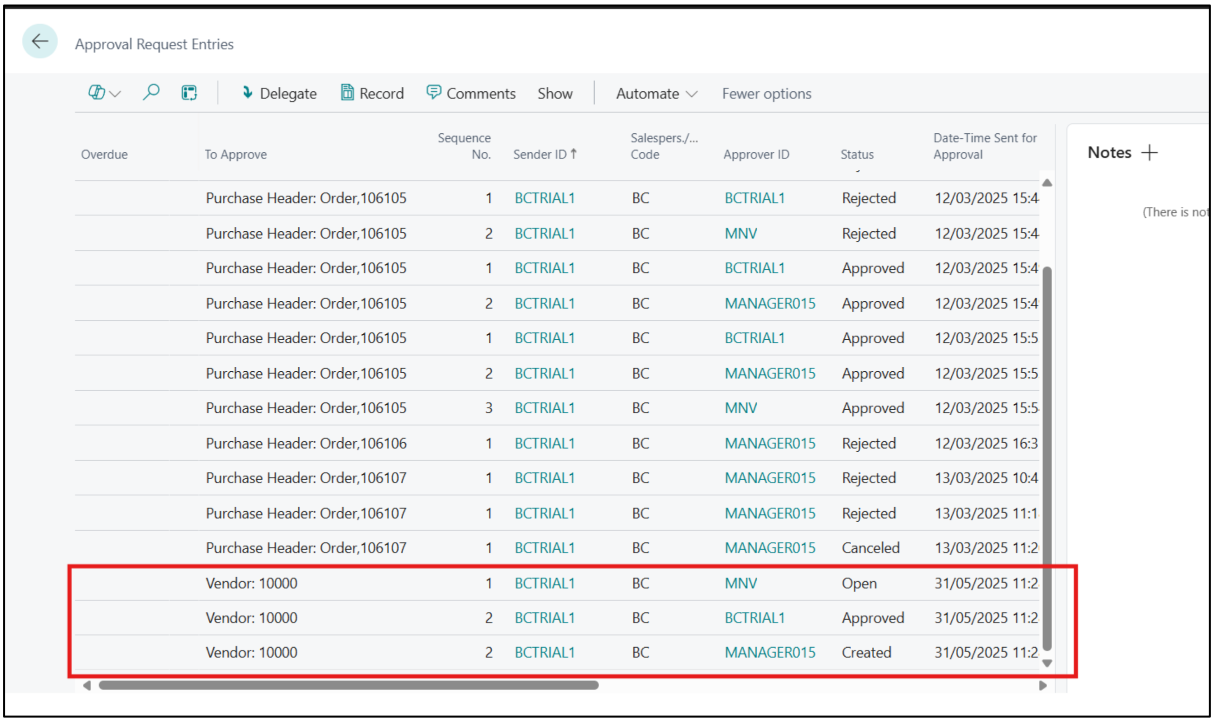


XX. When User tries to change the vendor's name, an approval request will be sent.



XXI. To check the approval entries, Navigate to "**Approval Request entries**" through search.

- If suppose, the user is approver as well as requester then its approval request will get automatically approved as it was in this case, we have two users at same level one is the **BC Trail** and another is **Manager015**.
- As **BC Trail** is requester as well as approver its request will get automatically approved, but also needs other user's approval for updating.



Overdue	To Approve	Sequence No.	Sender ID	Salespers./... Code	Approver ID	Status	Date-Time Sent for Approval
	Purchase Header: Order,106105	1	BCTRIAL1	BC	BCTRIAL1	Rejected	12/03/2025 15:4
	Purchase Header: Order,106105	2	BCTRIAL1	BC	MNV	Rejected	12/03/2025 15:4
	Purchase Header: Order,106105	1	BCTRIAL1	BC	BCTRIAL1	Approved	12/03/2025 15:4
	Purchase Header: Order,106105	2	BCTRIAL1	BC	MANAGER015	Approved	12/03/2025 15:4
	Purchase Header: Order,106105	1	BCTRIAL1	BC	BCTRIAL1	Approved	12/03/2025 15:5
	Purchase Header: Order,106105	2	BCTRIAL1	BC	MANAGER015	Approved	12/03/2025 15:5
	Purchase Header: Order,106105	3	BCTRIAL1	BC	MNV	Approved	12/03/2025 15:5
	Purchase Header: Order,106106	1	BCTRIAL1	BC	MANAGER015	Rejected	12/03/2025 16:3
	Purchase Header: Order,106107	1	BCTRIAL1	BC	MANAGER015	Rejected	13/03/2025 10:4
	Purchase Header: Order,106107	1	BCTRIAL1	BC	MANAGER015	Rejected	13/03/2025 11:1
	Purchase Header: Order,106107	1	BCTRIAL1	BC	MANAGER015	Canceled	13/03/2025 11:2
	Vendor: 10000	1	BCTRIAL1	BC	MNV	Open	31/05/2025 11:2
	Vendor: 10000	2	BCTRIAL1	BC	BCTRIAL1	Approved	31/05/2025 11:2
	Vendor: 10000	2	BCTRIAL1	BC	MANAGER015	Created	31/05/2025 11:2

7. Setting up Workflow Notifications:

Workflow notifications in Dynamics 365 Business Central are essential for alerting users about events requiring their attention, such as approvals or overdue tasks. These notifications can be delivered via email or internal notes, ensuring timely responses and streamlined business processes.

7.1 Prerequisites:

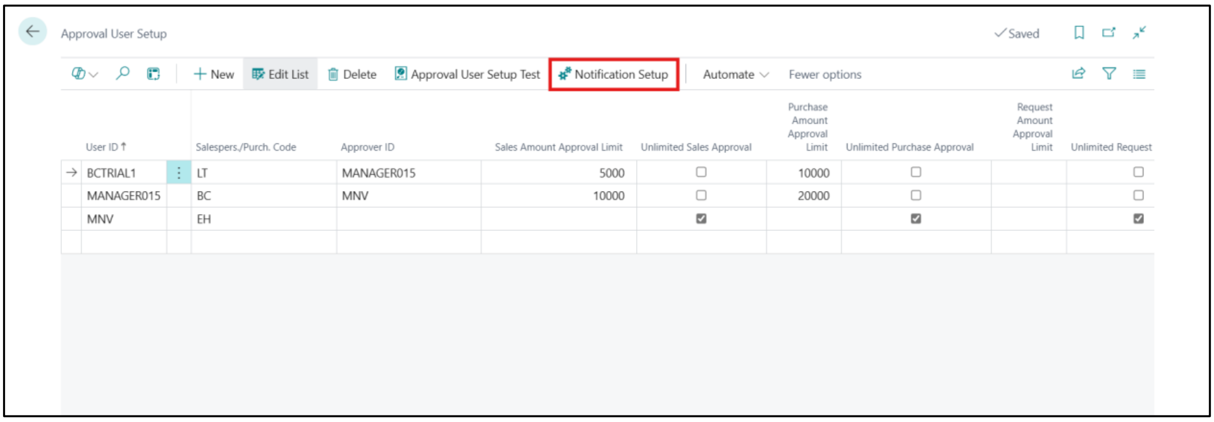
Before configuring workflow notifications, ensure the following:

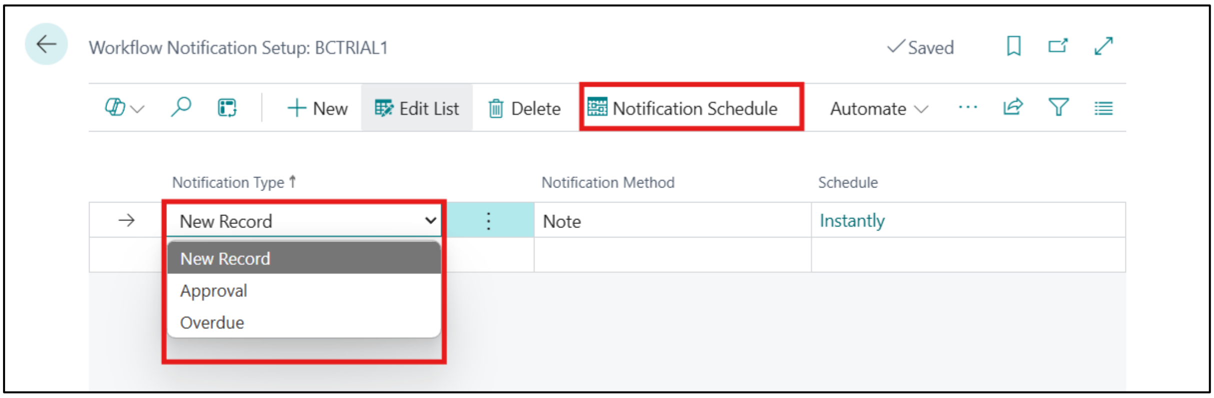
- Approval Users: Set up users involved in approval processes on the Approval User Setup page.
- Email Configuration: Configure email settings for both senders and recipients to enable email notifications.
- Job Queue Setup: Ensure the job queue is configured to handle workflow notifications and that the "Start Automatically from Server" option is selected.

7.2 Set Up Workflow Notifications:

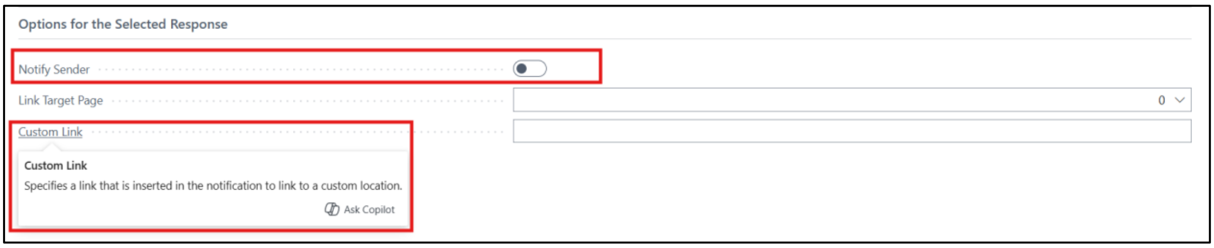
You can set up different aspects of workflow notifications in the following places:

- User can setup notification by navigating to “**Approval user setup**” for specific user through “**Notification schedule**”.





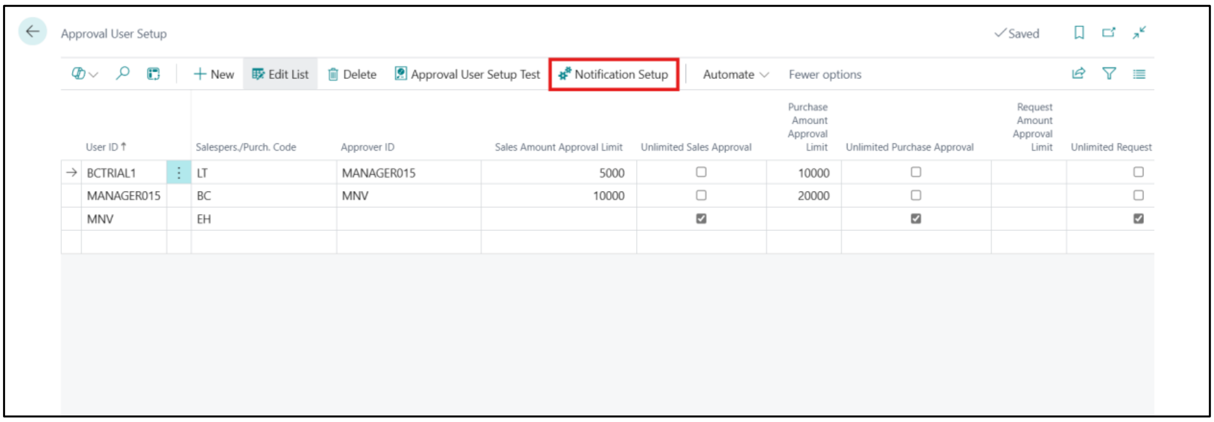
- User can also "**notify sender**" to notify the requested about the status of approval request.



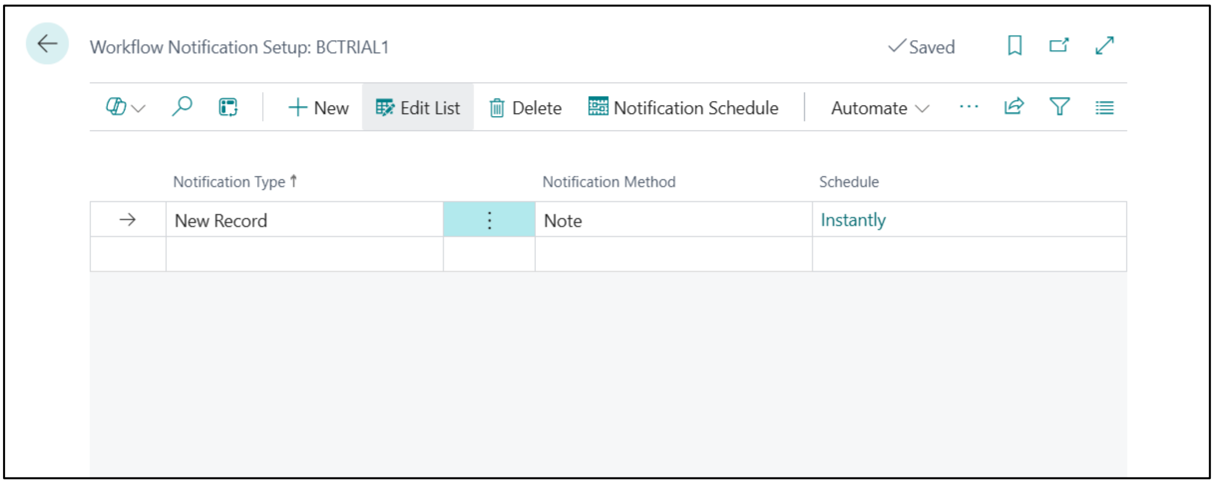
7.3 Steps for workflow notification setup:

I. Open Business Central and Click the **Tell me** icon (magnifying glass in the top-right corner). Or Use (Alt + Q), Enter "**Approval user setup**" and select related link.

II. Select the line for the user you want to set up notification preferences for, then choose the Notification Setup action.

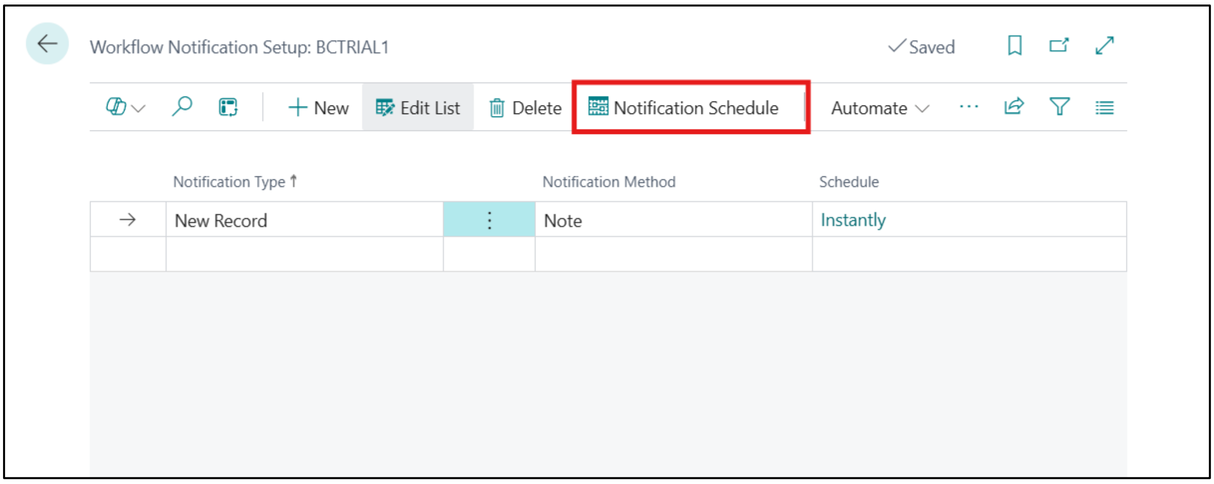


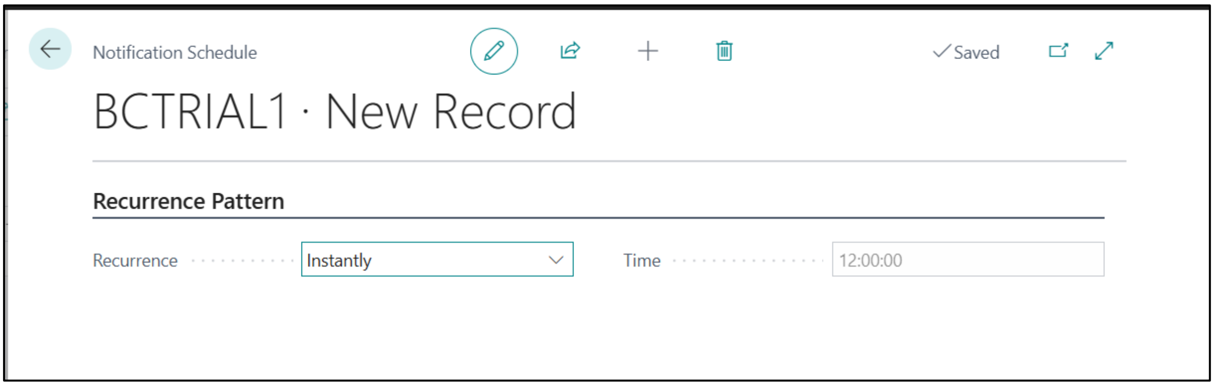
III. On the "**Workflow Notification Setup**" page, fill in the fields as described in the following table.



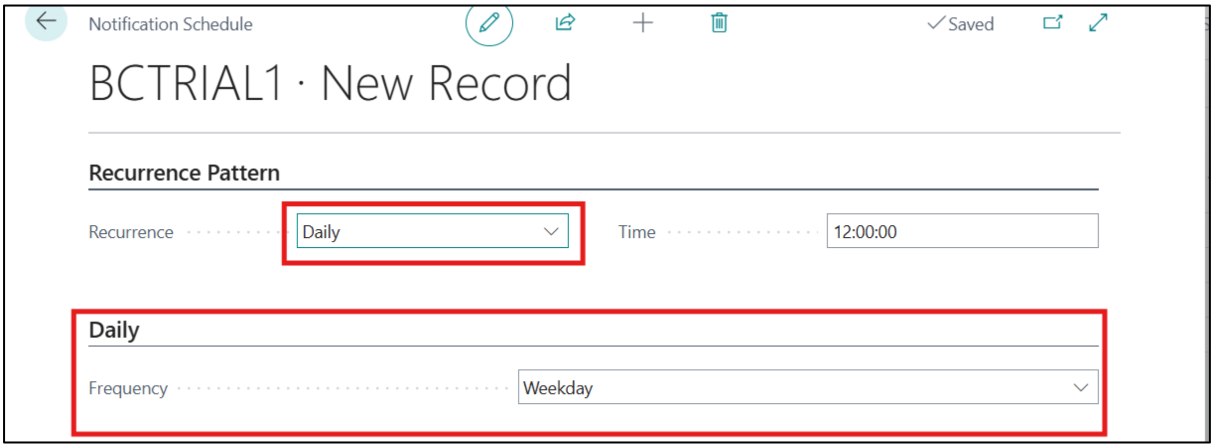
Field	Description
Notification Type	Specify the type of event the notification is about. Select one of the following options: - New Record specifies that the notification is about a new record, such as a document, that the user must act on. - Approval specifies that the notification is about one or more approval requests. - Overdue specifies that the notification is to remind users that they're late in acting on an event.
Notification Method	Specify if the notification is an email or an internal note.

IV. Choose the **Notification Schedule** action.

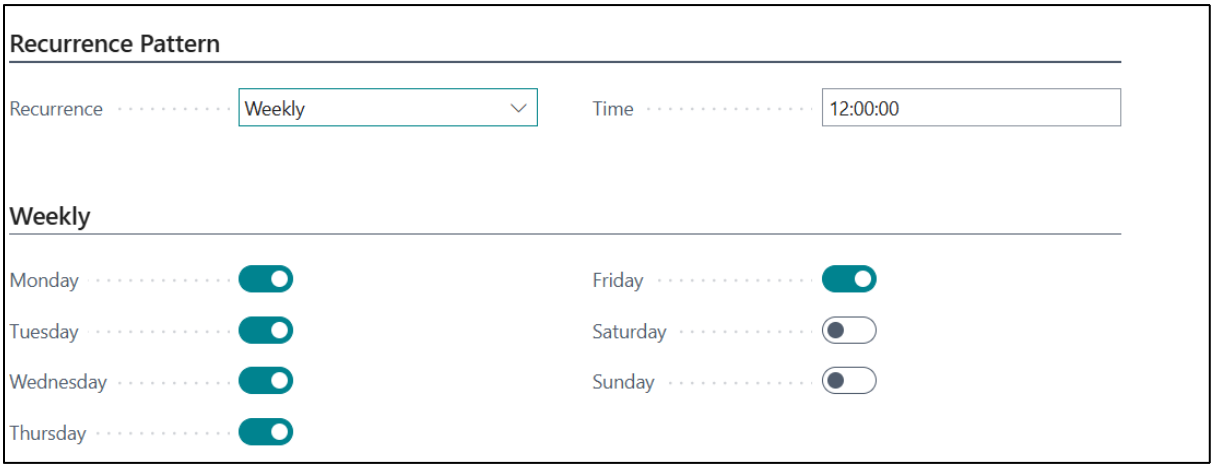




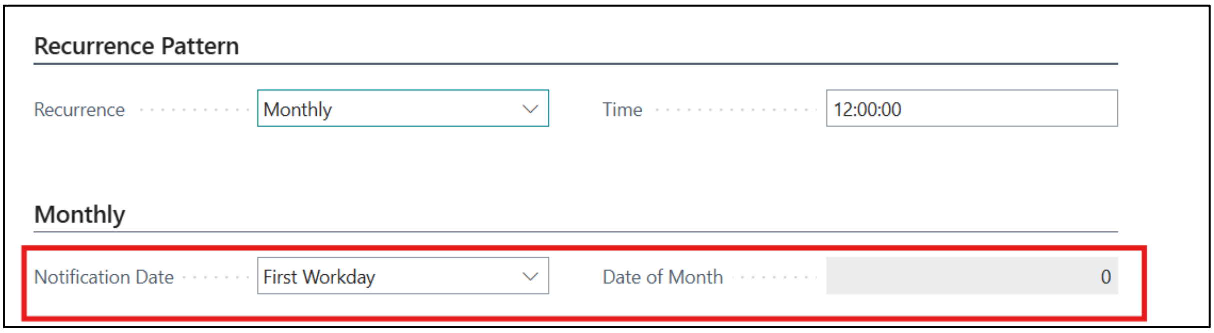
Field	Description
Recurrence	Specify the recurring pattern in which notifications are sent to the user.
Time	Specify the time of day when notifications are sent, applicable when Recurrence is set to anything other than instantly.



Field	Description
Daily Frequency	Specify the type of days the user receives notifications when Recurrence is Daily. Options: • Weekday – Every workday. • Daily – Every day, including weekends.



Field	Description
Monday through Sunday	Specify on which days the user receives notifications when Recurrence is Weekly.



Field	Description
Date of Month	Specify whether the user receives notifications on the first, last, or a specific date of the month.
Monthly Notification Date	Specify the exact date of the month the user receives notifications when Date of Month is set to Custom.

NOTE:

If you open the “Workflow Notification Setup” page from the “Approval User Setup” page the notification setup is linked to the approval user. The approval user will always receive workflow notifications according to that notification setup. If you use the Tell Me feature to open the Workflow Notification Setup page, the notification setup applies to all users.

8. Import & Export in Workflow:

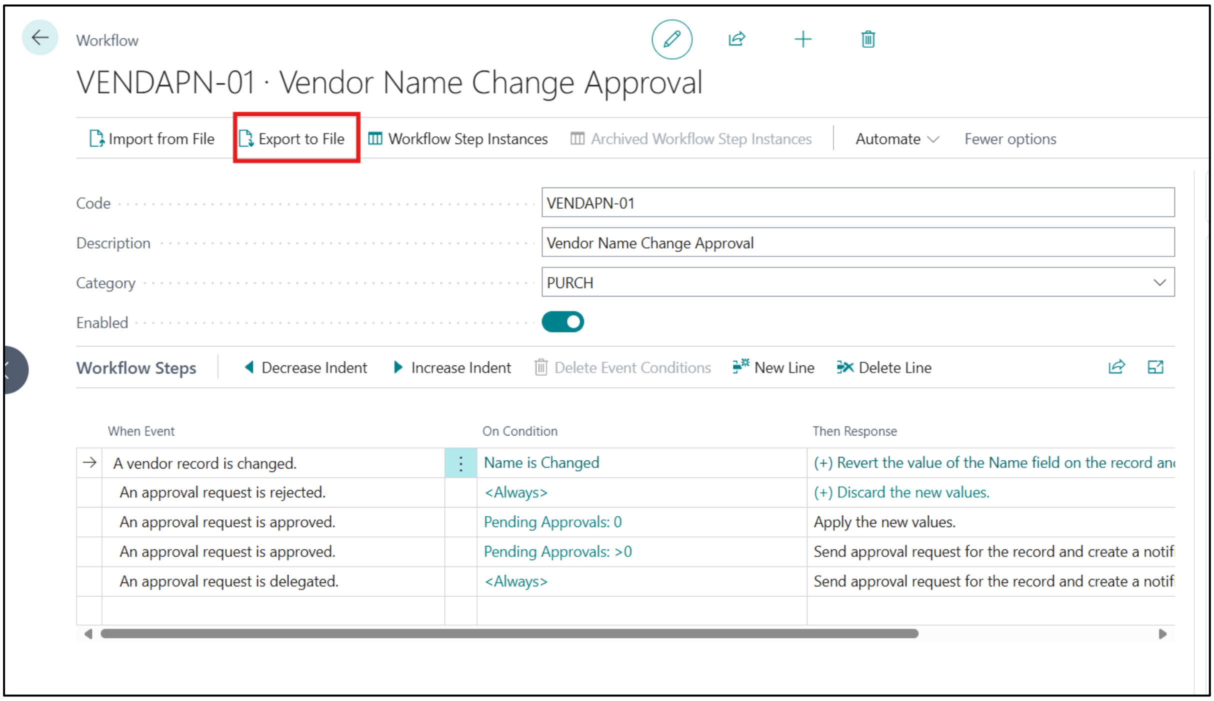
In Microsoft Dynamics 365 Business Central, the Export and Import Workflow feature enables users to transfer workflows between different databases or environments. This is especially useful for replicating workflow setups across companies, backing up existing workflows, or saving time when creating similar workflows in new environments.

After importing a workflow, review and adjust the event conditions, approval users, and responses to fit the current environment's needs. Imported workflows are disabled by default remember to enable them manually after validation.

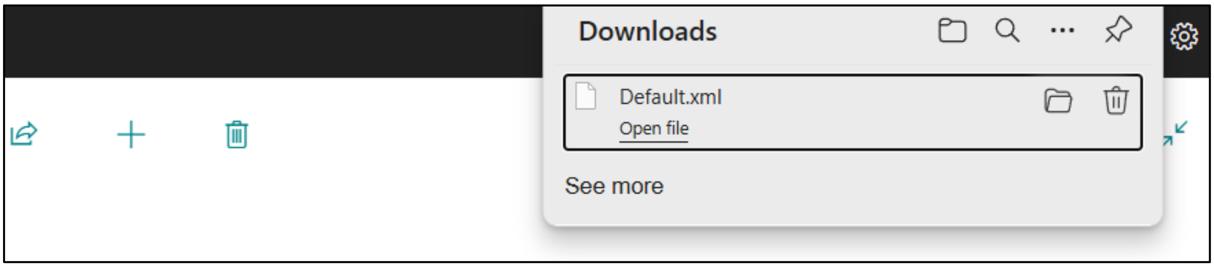
8.1 To export workflow:

I. Open Business Central and Click the Tell me icon (magnifying glass in the top-right corner). Or Use (Alt + Q), Enter "**Workflow**" and select related link.

II. Select a workflow, and then choose the Export to File action.



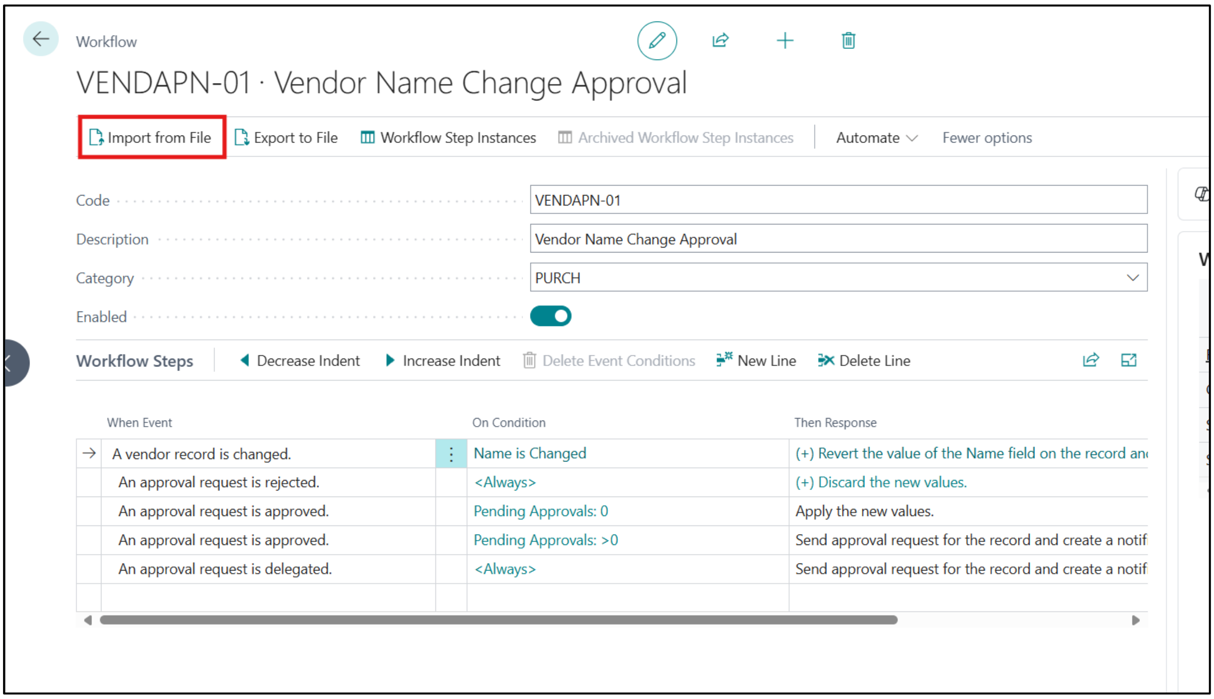
III. The Workflow file be download in xml format:



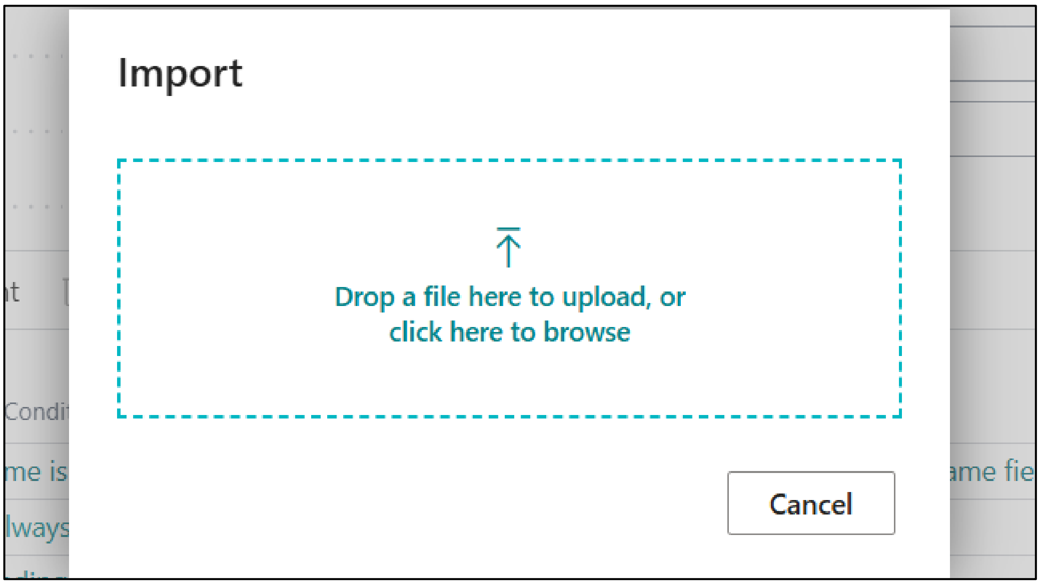
8.2 To import workflow:

I. Open Business Central and Click the Tell me icon (magnifying glass in the top-right corner). Or Use (Alt + Q), Enter “Workflow” and select related link.

II. Select a workflow, and then choose the Import to File action.



III. On the Import page, choose the XML file that contains the workflow, and then choose the Open button to Import.



NOTE: When importing a workflow, ensure that the workflow code does not already exist in the target environment. If it does, the existing workflow steps will be overwritten by the imported workflow