

User Manual

Aptean Food and Beverage ERP

Aptean Advanced Workflow

Product Documentation



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Release notes

Article • 9/2/2025 • 1 min read

To view what's new or changed in each release of the Aptean Advanced Workflow extension, select the specific release version.

Date	Release version	Description
August 2025	26.0.36.250816	Stability release
January 2025	25.0.34.250125	Feature release
October 2024	24.0.33.241001	Feature release
April 2024	24.0.31.240401	Stability release
December 2023	23.0.28.231117	Stability release
December 2023	23.0.27.231017	Stability release
December 2023	21.0.26.230311	Stability release
September 2022	20.0.25.220916	Stability release
June 2022	20.0.24.220527	Stability release
February 2023	20.0.23.220405	Stability release
February 2023	19.4.25.220916	Stability release
February 2023	19.4.22.220213	Stability release
February 2023	19.1.21.211213	Stability release
February 2023	18.4.25.220916	Stability release
February 2023	18.4.22.220213	Stability release
February 2023	18.3.20.210913	Stability release
February 2023	18.0.19.210525	Stability release
February 2023	18.0.19.210429	Stability release
February 2023	Release 17 BC 14	Stability release
February 2023	Release 17 BC 13	Stability release



February 2023	16.18.0.4	Stability release
February 2023	16.18.0.1	Stability release
February 2023	Release 16	Stability release
February 2023	15.17.4.0	Stability release
February 2023	15.17.3.0	Stability release



26.0.36.250816

Release Note • 8/18/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Workflow extension,

- The following event publishers have added to the *aWF - Task Scheduler* codeunit to provide greater flexibility and extensibility.
 - The *OnBeforeCreateTask* and *OnAfterCreateTask* publishers have been added to the *CreateTask* procedure.
 - The *OnBeforeSetTaskReady* publisher has been added to the *SetTaskReady* procedure.
 - The *CreateMultipleTask* publisher has been added to the *OnBeforeCreateMultipleTask* procedure.
 - The *CreateSingleTask* publisher has been added to the *OnBeforeCreateSingleTask* procedure.
- Technical validation checks have been added to prevent the system from creating a task scheduler job entry for an invalid task scheduler job queue entry.

Resolved issues

The following issue has been resolved in this release.

ID	Description
302161	The system incorrectly performs a license check for temporary workflow employees when to-do responsibilities are reassigned from an absent employee.



25.0.34.250125

Release Note • 1/27/2025 • 1 min read

Features

With this release of the Aptean Advanced Workflow extension, you can reverse the sign of the calculated date field values by selecting the **Reverse Sign** checkbox on the **Table Condition Sub Wild Card Values** and **Table Condition Multi Line Wild Card** pages. For example, you can change *5D* to *-5D* or *-2W* to *2W*.

UI/UX changes

The **Reverse Sign** field has been added to the **Table Condition Sub Wild Card Values** and **Table Condition Multi Line Wild Card** pages.

Resolved issues

The following issues have been resolved in this release.

ID	Description
239365	The system fails to open the associated Table Condition Card page upon executing the Field Examination action on the To-do Template List page. This issue occurs when the Type field value is set to <i>Field Examination</i> , and the Condition Code field value exists on the Alerts FastTab of the To-do Template Card page.
227682	The system fails to update the changes made to to-do templates upon selecting OK on the Transfer To-do Template Setup page.
241083	The system fails to update all the fields on existing to-do templates upon selecting OK on the Transfer To-do Template Setup page.



24.0.33.241001

Release Note • 10/2/2024 • 3 min read

Features

With the features added in this release of the Aptean Advanced Workflow extension, you can:

- Set mandatory comments for a specific decision value on a decision type to-do template card by selecting a value in the **Mandatory Comment Decision Value Filter** field. For more information, see [To create a to-do template](#).
- Turn on the **Copy Comment as a Note to Source** toggle on the **General** FastTab of the **To-do Template Card** page for all to-do types if you want the system to copy comments as a note to the source document automatically. For more information, see [To create a to-do template](#).
- Define sub wild card values to include date formula values from a source document (for example, customer) to calculate a date upon selecting the **Formula Wild Card Values** action on the **Table Condition Wild Card Values** and **Table Condition Multi Line Wild Card** pages, when the **Value Type** field is set to *System Value* and the **System Value** field is set to *Workdate* or *Today*. Additionally, you can use date field values in combination with the new date formula sub wild card calculation.

Enhancements/Modifications

With this release of the Aptean Advanced Workflow extension, the following enhancements and modifications have been made.

- The action bar of the **Workflow To-do List** page has been enhanced to improve readability.
- The *Commission* and *Print Document* options from the **Type** field on the **Table Condition Card** page have been made obsolete as these condition types are not required anymore.
- The after and before run warehouse post receipt and shipment hook-in codes have been added to the **Hook-ins** page.

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Mandatory Comment Decision Value Filter** field has been added to the **To-do Template Card** page.
- The **Copy Comment as a Note to Source** toggle has been moved from the **Criteria** FastTab to the **General** FastTab on the **To-Do Template Card** page.
- The *AF.WHSE.RCPT.L.POST*, *AF.WHSE.SHPT.L.POST*, *BEF.WHSE.RCPT.L.POST*, and *BEF.WHSE.SHPT.L.POST* hook-in codes have been added to the **Hook-ins** page.



- The *Commission* and *Print Document* options have been removed from the **Type** field on the **Table Condition Card** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
155714	The system incorrectly opens a shadow To-Do Card page upon selecting a to-do record associated with the employee from the Workflow To-Do List page, preventing the changes from being synchronized.
224888	An error occurs when selecting the AssistEdit button in the Filter field on the Table Condition Card page. This issue occurs when the value selected in the Field ID field is of type <i>Boolean</i> .



24.0.31.240401

Article • 4/5/2024 • 1 min read

Enhancements/Modifications

The following enhancements have been made in this release:

- The **Activation Condition** action opens the **Condition Card** page directly based on the **Condition Code** field value.
- The following publisher events are added:
 - Comments given in the system during a decision can be influenced, and the result is visible, for example, in the **Public Workflow Comments** FactBox.
 - Default responsibility replacement settings can be overridden with customized rules.
- Microsoft has removed some standard role centers and added some with BC24. The corresponding Aptean Advanced Workflow adjustments have been made (**Activity** subpages).

UI/UX changes

The **Activation Condition** action is added to the **To-do Template Card** page.

Resolved issues

Minor issues in the monthly and yearly subscriptions of the Aptean Advanced Workflow app in Microsoft AppSource.



23.0.28.231117

Article • 12/21/2023 • 1 min read

Resolved issues

The following issues have been fixed in this release:

- An error occurs when manually defining user permission sets on the **User Card** page.
- Unable to download the Aptean Advanced Workflow extension in languages other than German, even if they are supported.



23.0.27.231017

Article • 12/21/2023 • 2 min read

Features

The features in this release are listed below:

- The entitlement feature is now introduced for access control to seamlessly integrate with Microsoft licensing and roles. This release uses Microsoft 365 Admin Centre roles, such as the powerful Global Administrator job and Microsoft Entitlements. By doing so, it grants users license-based and role-based access through this extension.
- The default model for permissions in this extension has transitioned from XML files to AL objects. You can now define permission sets and permissions directly within the AL code.

Enhancements/Modifications

The enhancements in this release are listed below:

- Minor technical changes were made to keep our apps in line with the *updated* coding guidelines for Business Central.
- Minor technical changes were made by refactoring the **To-do** page to enhance navigation and improve overall usability.
- The newly developed hook-ins are introduced into the existing master data setup on the **Hook-ins** page to integrate seamlessly with the Aptean [Grower Return](#) extension.
- A set of additional keys are added to enhance the performance of the **Workflow** and **To-do** tables. These optimizations aim to provide a smoother and more efficient user experience, especially for users with large datasets or complex task structures.
- The **Reference Condition Code** value from the **Reference Type Card** page is displayed in the export workflow templates record.
- The **No, Description** and **Multi Line Check** fields are added to the **Examine To-dos** page to improve user experience and data maintenance.

Resolved issues

The following issue has been fixed in this release:

An error occurs, indicating that the specified value in the **Field Value** field on the **Examine To-dos** table does not exist, even though the value is registered.



21.0.26.230311

Article • 12/21/2023 • 1 min read

Enhancements/Modifications

The following enhancement has been made in this release:

Added *Fix Value Date*, *Fix Value Time*, *Fix Value Date Time*, *Fix Value Decimal*, *Fix Value DateFormula*, and *Fix Value Duration* options in the **Value Type** field on the **Field Modification** page to address the challenge of manipulating date fields within record sets, especially when dealing with different date formats across regions.

Resolved issues

The following issues have been fixed in this release:

- Headlines are not displayed on the Web Client.
- The code specified in the **Base Calendar Code** field is not used for the calculation.
- The file import fails even if the system states that it was successful.
- Permission error occurs when entering the to-do comments on the **To-do** page.
- An error occurs after executing the **Set Archive Identifier** action on the **Workflows** page, stating that the page must be reloaded to see the records again.
- After performing the **Manually Complete** action on the **Workflows** page, the page is not reloaded/refreshed.
- The new hook-in procedure for Processor Symbols has a length of 50 characters rather than 20.



20.0.25.220916

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

The enhancements in this release are listed below:

- A new option, '*Date Time*,' is added in the **System Value** field:
 - On the **Asynchronous Field Modification Card** page. With this new addition, you can also change the field values of type '*Date Time*'.
 - On the **Table Condition Wild Card Values** page and the **Table Condition Multi Line Wide Card** page. With this new addition, you can also use and compare the field values of type '*Date Time*' in conditions.
- You can load and customize the newly developed Hook-ins into the existing master data setup on the **Hook-ins** page by clicking the **Load Hook-ins** action.

Resolved issues

The following issue has been fixed in this release:

The new hook-in procedure for Processor Symbols has a length of 50 characters rather than 20.



20.0.24.220527

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

The enhancements in this release are listed below:

- A localized version of the Advanced Workflow extension is made available for the Netherlands market with the addition of Dutch language code [nl-NL].
- Publisher offers the ability to initialize workflow employees, such as salespersons and purchasers.



20.0.23.220405

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made to keep our apps in line with the *updated* coding guidelines for Business Central.



19.4.25.220916

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

In this release the following enhancements are intended for new and existing customers of Microsoft Dynamics Version 19.0:

- A localized version of the Advanced Workflow extension is made available for the Netherlands market with the addition of Dutch language code [nl-NL].
- Publisher offers the ability to initiate workflow processes for employees, such as salespersons and purchasers.
- A new option, '*Date Time*,' is added in the **System Value** field:
 - On the **Asynchronous Field Modification Card** page. With this new addition, you can also change the field values of type '*Date Time*'
 - On the **Table Condition Wild Card Values** page and the **Table Condition Multi Line Wide Card** page. With this new addition, you can also use and compare the field values of type '*Date Time*' in conditions.
- You can load and customize the newly developed Hook-ins into the existing master data setup on the **Hook-ins** page by clicking the **Load Hook-ins** action.

Resolved issues

The following issue has been fixed in this release:

- The new hook-in procedure for Processor Symbols has a length of 50 characters, rather than 20.



19.4.22.220213

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

In this release, the following enhancements are intended for new and existing customers of Microsoft Dynamics Version 19.0:

- A localized version of the Advanced Workflow extension is made available for the Netherlands market with the addition of Dutch language code [nl-NL].
- A new task scheduler has been implemented, which allows tasks to be set to run at a specific time and date, and additional checks have been added to ensure tasks are correctly executed.
- Addition of mail functionality to the workflow employee system. This new feature allows you to send emails from within the workflow system, streamlining communication and collaboration.
- A custom exit point codeunit is included, which allows you to customize your workflow setup.

Resolved issues

The following issues have been fixed in this release:

- Certain fields in the Dutch version are mistranslated.
- Umlaut characters are translated incorrectly (e.g., äöü)
- The new hook-in procedure for Processor Symbols has a length of 50 characters rather than 20.



19.1.21.211213

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

In this release the enhancements are intended for new and existing customers of Microsoft Dynamics Version 19.0:

A localized version of the Advanced Workflow extension is made available for the Netherlands market with the addition of Dutch language code [nl-NL].

Resolved issues

The following issue has been fixed in this release:

- The parameter type in the cryptography management method was set as Option instead of Enum.



18.4.25.220916

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

In this release the following enhancements are intended for new and existing customers of Microsoft Dynamics Version 18.0:

- A localized version of the Advanced Workflow extension is made available for the Netherlands market with the addition of Dutch language code [nl-NL].
- Publisher offers the ability to initialize workflow employees, such as salespersons and purchasers.
- A new option, '*Date Time*,' is added in the **System Value** field:
 - On the **Asynchronous Field Modification Card** page. With this new addition, you can also change the field values of type '*Date Time*'
 - On the **Table Condition Wild Card Values** page and the **Table Condition Multi Line Wide Card** page. With this new addition, you can also use and compare the field values of type '*Date Time*' in conditions.
- You can load the customized and the newly developed Hook-ins into the existing master data setup on the **Hook-ins** page by clicking the **Load Hook-ins** action.

Resolved issues

The following issue has been fixed in this release:

The new hook-in procedure for Processor Symbols has a length of 50 characters rather than 20.



18.4.22.220213

Article • 4/3/2023 • 1 min read

Enhancements / Modifications

In this release the following enhancements are intended for new and existing customers of Microsoft Dynamics Version 18.0:

- A localized version of the Advanced Workflow extension is made available for the Netherlands market with the addition of Dutch language code [nl-NL].
- A new task scheduler has been implemented which allows tasks to be set to run at a specific time and date, and additional checks have been added to ensure tasks are correctly executed.
- A custom exit point codeunit is included allowing users to customize their workflow setup.

Resolved issues

The following issues have been fixed in this release:

- Certain fields in the Dutch version are mistranslated.
- Umlaut characters are translated incorrectly (e.g., äöü)
- The new hook-in procedure for Processor Symbols has a length of 50 characters rather than 20.



18.3.20.210913

Article • 4/3/2023 • 2 min read

Features

The features in this release are listed below:

- A checklist feature has been provided in Business Central, which enables you to streamline onboarding tasks that opens on the Role Center page when accessed for the first time.
- A new "OnBeforeCheckIsEmptyWorkflowChangeLogEntryIsEmpty" publisher in the "Workflow Management" codeunit enables you to change the behavior of the system before the Aptean Advanced Workflow change log is checked.

Enhancements/Modifications

The enhancements in this release are listed below:

- Added a card page to the **Synchronous Field Modification List** to improve user experience and simplify data maintenance.
- Templates are provided to show users how to customize their workflow projects and combine them with external tools.
- The agilesWorkflow has been rebranded to Aptean Advanced Workflow.

Resolved issues

The following issues have been fixed in this release:

- The length of the field values overflows when adding an employee in the To-dos template.
- An error occurs when trying to reprocess a scheduled task.
- The field values for the wild card and sub-wild card are not displayed correctly in relation to the conditions on the **Table Condition Card** page.
- The field values for the wild card and sub-wild card are not displayed correctly in relation to the selected additional condition code on the **To-do Template Card** page.
- The Table ID value is not getting cleared when setting the page ID for the To-dos template.
- Unable to use Enum fields instead of Option fields in conditions and field modifications.
- The length of the field values overflows when scheduling tasks on the **Job Queue Entries** page.



- When clicking the values in the flow fields on the **To-do Group Template Details** and **To-do Template Details** Factboxes, it does not navigate the relevant pages.



18.0.19.210525

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

The agilesWorkflow has been rebranded to Aptean Advanced Workflow.



18.0.19.210429

Article • 4/3/2023 • 1 min read

Features

With this release of the Aptean Advanced Workflow extension, supports are added for dynamic links based on the connected service, which enhances user experience and improves performance.

Enhancements/Modifications

The enhancements in this release are listed below:

- The BC employee table now uses the company email address instead of the private email address for agilesWorkflow employees.
- Added the ability to work with multiple tenants and modified the link so that the users can jump to the source in my to-dos for a customer, item, vendors etc.
- Users can now manage their workflows with the expanded view option available for both To-dos and To-do Groups.
- Emails are now sent from the BC Mail accounts instead of SMTP (Simple Mail Transfer Protocol).

Resolved issues

The following issue has been fixed in this release:

- Unable to change the status in to-do responsibilities when a filter is applied.
- Overflow error occurs when copying field values.



Release 17 BC14

Article • 4/3/2023 • 1 min read

Features

In this release, the following features are intended for new and existing customers of Microsoft Dynamics Version 14.0:

- Use extensions for agilesWorkflow on-premises version.
- Use a new lookup table, **Codeunit Metadata List** in the **Exit Point Codeunit ID** field on the **To-Do Status Changes** page.
- Use a new option, **Changed Source**, in the **Type** field on the **Table Condition Card** page.

Enhancements/Modifications

The GUI is optimized for the Web Administrator role for a better user experience.

Resolved Issues

The following issues have been fixed in this release:

- Unable to access the company parameter while logging through the Web client link.
- Unable to set up default Network Diagram.
- The character limit of the fields is upgraded in compliance with the updated coding guidelines for Business Central.
- Workflow Subscriber has been added to subscribe to the post of a document such as purchase order and sales order.
- The length of the Decision Option Value Description has been updated to support different language translations.
- On the **Table Join Card** page, the values under the **Table Join** FastTab are not populated when you select **Table ID to Join**.



Release 17 BC13

Article • 4/3/2023 • 1 min read

Features

In this release, the following features are intended for new and existing customers of Microsoft Dynamics Version 13.0:

- Use extensions for agilesWorkflow on-premises version.
- Use a new lookup table, **Codeunit Metadata List** in the **Exit Point Codeunit ID** field on the **To-Do Status Changes** page.
- Use a new option, **Changed Source**, in the **Type** field on the **Table Condition Card** page.

Enhancements/Modifications

The GUI is optimized for the Web Administrator role for a better user experience.

Resolved Issues

The following issues have been fixed in this release:

- Unable to access the company parameter while logging through the Web client link.
- Unable to set up default Network Diagram.
- The character limit of the fields is upgraded in compliance with the updated coding guidelines for Business Central.
- Workflow Subscriber has been added to subscribe to the post of a document such as purchase order and sales order.
- The length of the Decision Option Value Description has been updated to support different language translations.
- On the **Table Join Card** page, the values under the **Table Join** FastTab are not populated when you select **Table ID to Join**.



16.18.0.4

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

The GUI is optimized for the Web Administrator role for a better user experience.



16.18.0.1

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

The GUI is optimized for the Web Administrator role for a better user experience.



Release 16

Article • 4/3/2023 • 1 min read

Features

With this release of the Aptean Advanced Workflow extension, you can view a headline on the Role Center page, which contains special information that can be accessed quickly. This information is updated every 15 seconds based on the change in data.

Resolved Issues

The following issue was resolved in this release:

- On the **Condition** page, the FlowFields in the condition lines were not calculated while a workflow was being executed.



15.17.4.0

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

The enhancements in this release are listed below:

- The visibility of invisible FastTabs, such as Loop Group in **To-do Groups Templates**, have been enabled to optimize the web client user interface.
- The visibility of invisible FactBoxes, such as Public Workflow Comments in **To-dos**, have been enabled to optimize the web client user interface.



15.17.3.0

Article • 4/3/2023 • 1 min read

Enhancements/Modifications

The GUI is optimized for the Web Administrator role for a better user experience.



Introduction

Article • 4/3/2023 • 1 min read

The Aptean Advanced Workflow (AAW) extension helps you to increase productivity, reduce costs and react faster using real-time information. With this extension, you can prioritize, optimize and automate tasks across every business process you have with this extension. Aptean Advanced Workflow gives you unprecedented control and insight into your company. This frees up time to work on more pressing obligations, while leading to fewer errors from manual workflow management and the costs that come from those errors. You can achieve a completely optimized process chain with flexible configuration parameters and the ability to easily scale for growth.

The Aptean Advanced Workflow illustrates your business processes in your business central database by adding or enhancing functions not provided by the core platform. This enables you to manage tasks by visually modelling your business process and associating the different steps in that process to Archer actions. These functions will help to increase productivity and decrease complexity in your workflow.

Aptean Advanced Workflow provides the following key features:

- Enhanced Productivity
- Reduced Costs
- Better Decision-Making
- Future Flexibility
- Easy Setup & Use
- No Programming or Coding



Setup

Article • 10/14/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up the extension](#)
- [Set up the Role Center](#)
- [Set up the workflow](#)
- [Manage teams and employees](#)



Manage permission sets

Article • 10/14/2024 • 4 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Admin
- Basic
- Business Central default
- License
- License Internal
- User

Admin permission sets

Users with this permission set can access and utilize all features without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *AWF - ADMIN*.

Basic permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform specific actions. These permissions typically involve additional conditions or approvals before the action can be completed.

The basic permission set ID for this extension is *AWF - BASIC*.

Business Central default permission sets

Users with this permission set can access the Business Central default calendars. This is used in conjunction with other permission sets.

The BC default permission set ID for this extension is *AWF - BCDEFAULT*.



License permission sets

Users with this permission set can use the entitlements feature of Business Central to gain access to the license of this extension.

The license permission set ID for this extension is *AWF - LICENSE*.

License internal permission sets

Users with this permission set can use Business Central's entitlements feature to access this extension's internal license.

The license permission set ID for this extension is *AWF – LICENSE INTERNAL*.

User permission sets

Users with this permission set can receive tasks and complete them. These permission sets provide limited access, users assign or configure any tasks or workflows.

The user permission set ID for this extension is *AWF - USER*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see [Assign permissions to users and groups](#).

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.

The **Users** list page opens.

2. Navigate to the username for which you want to assign the permission set and select it.

The **User Card** page opens.

3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.

The associated fields are automatically updated based on the entered value. The user has the necessary permissions to use the features of the Aptean Advanced Workflow extension, ensuring secure and role-based access.



Set up advanced workflow

Article • 10/14/2024 • 3 min read

The following procedure outlines how to install the Aptean Advanced Workflow extension.

1. Select the Search icon , enter **Extension Management**, and then choose the related link.

The **Extension Management** list page opens.

2. Select and click **Aptean Advanced Workflow**.

3. On the context menu, click **Install**.

The **Extension Installation** page opens.

4. Click **Next**.

5. Click **Install** on REVIEW EXTENSION INFORMATION BEFORE INSTALLATION.

The extension is installed, and a prompt appears to confirm the same.

6. Click **OK**.

7. Similarly, install the **Aptean Advanced Workflow Base Application** extension.

On installing the two extensions, the description in the **EXTENSION MANAGEMENT** page changes to **Installed**.



Set up the Role Center

Article • 10/14/2024 • 2 min read

The following procedure outlines how to set up the Role Center.

1. On the Business Central Role Center, click **Settings** .
2. Select **My Settings** from the dropdown menu.
3. On the **My Settings** page, change **Role** to **Administrator (Aptean Advanced Workflow)** from the AssistEdit button.
4. Click **OK**.



Set up the workflow

Article • 10/14/2024 • 9 min read

The following procedure outlines how to set up the workflow.

1. On the Role Center in Business Central, click **Setup**.
2. Select and click **Workflow Setup**.

The **Workflow Setup** page opens. A confirmation prompt appears to check if the system should try to identify the setup for web services on the base of your session ID.

3. Click **Yes**.

A prompt appears to check if the system should try to identify the setup for universal app on the base of your session ID.

4. Click **Yes**.

A prompt appears to confirm whether you want to use the profile WKFL - ADMINISTRATOR as default.

5. Click **Yes**.

A prompt appears notifying you that the profile WKFL -ADMINISTRATOR already exists and to confirm whether you want to overwrite the profile.

6. Click **Yes**.

A prompt appears to confirm whether you want to create the WKFL Cue Setup and notify you that the existing setup will be overwritten.

7. Click **Yes**.

A prompt appears to confirm whether you want to create the currently logged user as an employee and add it to the administration team 'WKFLADMIN'.

8. Click **Yes**.

A prompt appears to confirm whether you want to create the Job Queue Entries for Aptean Advanced Workflow.

9. Click **Yes**.



Set up workflow template

Article • 4/23/2024 • 10 min read

To create a workflow template for new customer

1. On the Role Centre, go to **Templates > Workflows**.
2. On the action bar, click **New**.
The **Workflow Template Card** page opens.
3. On the **General** FastTab, enter values in the **Reference Type No.**, **Code** and **Description** fields.
4. On the **Workflow Template** FastTab, select the type in the **Type** field.
5. In the **Code** field, choose the lookup button and select an existing code. Alternatively, choose the **New** action to create a new code as explained in [To create a to-do template for the customer](#).
6. Add additional workflow template lines if required.
7. Setup the reference type for the customer; see how [to set up the customer reference type](#).
8. On the action bar, go to **Actions > Functions > Visual View – Network Diagram**.
You can view the final workflow template.
9. Close the page.

To set up customer reference type

1. Click the Menu icon.
2. Select the **Reference Types** under the **Setup** section.
3. On the **Reference Types** page, open the card for a customer you want to create a reference.
4. Click the Context Menu and select the **Edit** option.
5. On the **Customer** page, under **General** FastTab, select the value from the existing list in the **Default Workflow Template Code** field.

To create a to-do template

The following procedure outlines how to create a to-do template.



1. Select the Search icon, enter **To-Do Template List**, and then choose the related link.
The **To-Do Template List** page opens.
2. On the action bar, select **New**.
The **To-Do Template Card** page opens.
3. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Reference Type No.	Select the reference type number that the to-do is based on.
Reference Type Description	Specifies the description of the selected reference type number.
Code	Enter a code for the to-do template.
Description	Enter a description for the to-do template.
Priority	Select the priority of the to-do template. The available options are: <i>Low</i> , <i>Normal</i> , and <i>High</i> . In combination with status level assignments, it is possible to define a different status behavior for a to-do.
Category Code	Select the category code. This provides another possibility of live to-dos in the to-do overview later.
Transfer Comment	Turn on the toggle if you want the comment lines to automatically transfer to the to-do card when this is part of a workflow.
Mandatory Comment	Turn on the toggle if you want the person responsible to enter a comment before they can close this to-do.
Copy Comment as a Note to Source	Turn on the toggle if you want the system to copy comments automatically as a note to the source.
Copy Comments as Notification to User	Select the user you want to notify the copied comments to. This field is editable only when the Copy Comment as a Note to Source toggle is turned on.
Update Keywords Automatically	Select when the keywords for the to-do must be automatically updated. The available options are: <i>On Status Update</i> , <i>On Creation</i> , and <i>Not</i> .

4. On the **To-do Template Comments** FastTab, you can add comment lines for the template and enter the required information in the following fields:



Field	Description
Date	Select or enter a date for the comment.
Preview Text	Preview the comment text. This field value is derived from the Rich Content Editor text.
Public Comment	Select this checkbox if you want this comment to be public.
Use in E-mail Notification	Select this checkbox if you want this comment to be used in e-mail notification.
Copy Comment as Note to Source	Select this checkbox if you want the system to copy this comment as a note to the source document.
Copy Comments as Notification to User	Select the user you want to notify this copied comment to. This field is editable only when the Copy Comment as a Note to Source checkbox is selected.

5. On the **Responsibility** FastTab, enter the required information in the following fields:

Field	Description
Team Code	Select the team responsible for the to-do. Anyone on the selected team can view and work on the to-do.
Team Name	Specifies the name of the selected team.
Employee Code	Select the employee responsible for the to-do.
Employee Name	Specifies the name of the selected employee.

6. On the **Activation** FastTab, enter the required information in the following fields:

Field	Description
Decision To-Do Template Code	Select a relevant to-do template code containing a decision.
Decision To-Do Template Description	Specifies the description of the selected decision to-do template.
Decision Value Filter	Select the decision option from the selected decision to-do template to activate the to-do template.
Condition Code	Select the table condition code to activate the to-do template.



Condition Description

Specifies the description of the selected table condition.

7. On the **Time Frame** FastTab, enter the required information in the following fields:

Field	Description
Reference Date	
Source Type	Select the source of the reference date for the calculation of the to-do duration. The available options are: <i>Workflow</i> , <i>Reference Table</i> , <i>To-do Group</i> , and <i>To-do</i> .
Source Code	Select the source code if you have selected <i>To-do Group</i> or <i>To-Do</i> in the Source Type field.
Source Description	Specifies the description of the selected source.
Duration	
Duration Date Calculation	Enter the date formula to use to calculate the duration of the to-do.
Critical Date Calculation	Enter the date formula to use to calculate the critical date of the to-do.

8. On the **Criteria** FastTab, enter the required information in the following fields:

Field	Description
Type	Select the type of to-do for this to-do template code. The available options are: <i>Manual Completion</i> , <i>Date Monitoring</i> , <i>Reference Table</i> , <i>Field Examination</i> , and <i>Decision</i> .
Condition Code	Select a condition code. This field is visible if you have selected the <i>Field Examination</i> option in the Type field.
Condition Description	Specifies the description of the selected condition. This field is visible if you have selected the <i>Field Examination</i> option in the Type field.
Decision Option Set Code	Select a decision option code. This field is visible if you have selected <i>Decision</i> option in the Type field.
Decision Options Set Description	Specifies the description of the selected decision option. This field is visible if you have selected the <i>Decision</i> option in the Type field.



No Comment for Selection of Decision Values	Turn on the toggle if you do not want any comment to be entered for any decision values. This field is visible if you have selected the <i>Decision</i> option in the Type field.
Mandatory Comment Decision Value Filter	Select a decision value for which a comment is mandatory. This field value can be set as a filter value based on the Decision Option Set Code field value. This field is visible if you have selected <i>Decision option</i> in the Type field and is editable only when the Mandatory Comment toggle on the General FastTab is turned on. This field is not editable if you have turned on the No Comment for Selection of Decision Values toggle.

The to-do template has been created.

To create a table condition code

1. Select the search icon  Tell me what you want to do , enter **Table Condition List**, and then choose the related link.
2. On the **Table Condition List** page, select the **New** action.
The **Table Condition Card** page opens.
3. On the **General** FastTab, enter values in the **Table ID**, **Code** and **Description** fields.
4. On the **Table Condition** FastTab, perform the following steps:
 - a. In the **Type** field, select the type.
 - b. In the **Field ID** field, specify the table where the value in the Column Caption field is mapped.
 - c. In the **Filter** field, specify which field the column in the column no. field maps to.
5. Repeat step 4 for any additional conditional lines that you want to add.
6. Close the page.

To create a to-do group template

1. On the **Role Centre**, go to **Templates > To-do Groups** or select the search icon  Tell me what you want to do , enter **To-Do Group Template List**, and then choose the related link.
2. On the **To-do Group Template List** page, select the **New** action.



3. On the **To-do Group Template Card** page, on the **General** FastTab, fill in the fields as necessary.
4. On the **To-do Group Template** FastTab, in the **Code** field, choose the lookup button and select an existing code.
Alternatively, choose the **New** action to create a new code as explained in [To create a to-do template code.](#)
5. Add additional To-Do Group Template lines if required.
6. Close the page.



Manage teams and employees

Article • 10/14/2024 • 15 min read

Load teams

1. On the Role Center of Business Central, click **Setup**.
2. Select and click **Workflow Setup**.

The **Workflow Setup** page opens.

3. On the action bar, click the AssistEdit button, select **Actions** > **Initialize** > **Team** > **Load from table 5083 / "Team"**.

A prompt appears to confirm whether you want to load the teams from the table 5083/ "Team".

4. Click **Yes**.

A prompt appears to confirm whether you want to load the assignment of employees from the table 5084 / 'Team Salesperson'.

5. Click **Yes**.

A prompt appears to notify the creation of teams.

6. Click **OK**.

Load employees

1. Select the Search icon , enter **Employees**, and then choose the related link.
The **Employees** page opens.

2. On the action bar, click **New**.

The **Employee Card** page opens.

3. On the **General** FastTab, enter the **Code** and **Name** field values.

4. On the **References** FastTab, enter the ID in the **User ID** field.

5. Click the Back button to navigate to the **Employees** page.

6. To delete a user, select the required line and click **Delete** on the action bar.



Update teams

1. Select the Search icon , enter **Teams**, and then choose the related link.

The **Teams** Administration page opens.

2. Select and click **Workflow Admin** in the **Code** field.

3. On the action bar, click **Employee**.

The **Team Employees** page opens.

4. Select and click the required **Employee Code** to choose the employees.

5. Click the Back button to navigate to the Role Center.

Define keywords as information about the data item

1. On the Role Center, go to **Setup > Reference Types**.

The **Reference Types** page opens.

2. On the action bar, click **New** to open the **Reference Type Card**.

3. On the **General** FastTab, enter values in the **No.**, **Editing Page ID** and **Buffer Time on Function** fields.

4. Turn on the **Automatic Workflows** toggle.

5. On the action bar, click **Keyword Definitions**.

The **Workflow Keyword Definitions - Customer** page opens.

6. Enter the **Table ID** and **Field ID** to define Keywords as Information about the Data Item.

7. Click the Back button to navigate to the Role Center.



User perspective: Scenario 1

Article • 4/3/2023 • 9 min read

1. Select the search icon  Tell me what you want to do , enter **Customer**, and then choose the related link.
2. On the **Customer** list page, select the **New** action.
3. Select a template for a new customer, e.g. B2B, and then click **OK**.
The **Customer Card** page opens.
4. Enter the name in the **Name** field.
5. Click the Back button to navigate to the Role Center.
6. On the Activities cues, under the **To-Dos** section and select the **NOW** data cues.
7. The **Now** list page opens and select the workflow from the list.
8. On the action bar, select the **Examine Fields** function.
9. Add a new column, e.g. Field value.
10. If all the conditions are met, the **Status** check box for the table condition line is set; if it is not, you must fill the missing values in the particular fields. To specify the value in the newly added column, see [To specify the value in the newly added column](#).
11. Close the page.

To specify the value in the newly added column

1. Choose the lookup button in the newly added column (Field Values) and select an existing code. Alternatively, choose the **New** action to create a new VAT Business Posting Groups code.
2. Click **New**.
3. Enter **Code**.
4. Enter the **Description** for the code.
5. Click **OK**.

To view the to-dos of the workflow in the current status

1. On the **Role Centre** page, you can see all the workflows.



2. Select the **Open** data cues on the Activity cues.

You can view the newly created workflow.

3. Select the workflow from the list.

4. On the action bar, go to **Manage > Edit**.

5. On the **Workflow Card** page, select the **Expand View** on the action bar to show all the To-dos of the Live Workflow in their status.

6. Close the page.

To close the to-dos of the workflow

1. Select the **Now** data cues on the Activities cues from Role Centre.

2. Select the workflow from the **NOW** list page that you want to close.

3. On the action bar, select the **Manually Complete** function.

A prompt appears to confirm whether you want to close the selected open To-do(s)

4. Choose **Yes**.

5. Click the Back button to navigate to the Role Center.

6. On the **Role Centre** page, select **Workflows**.

You can view that the workflow process is completed.



User perspective: Scenario 2

Article • 4/3/2023 • 3 min read

1. Select the search icon  Tell me what you want to do , enter **Purchase Order**, and then choose the related link.
2. On the **Purchase Order list** page, select the **New** action.
The **Purchase Order** page opens.
3. Select or enter the name in the **Vendor Name** field.
4. Expand the **General** FastTab and ensure that the **Purchase Code** field is not blank. If this field is left blank, an error message will be displayed.
5. On the **Lines** FastTab, perform the following steps:
 - a. In the **Type** field, select Item.
 - b. In the **No.** field, specify the number of products according to the type of line selected.
 - c. Enter the values in the **Description**, **Location Code** and **Quantity** fields.
6. Now to post the **Purchase Order**, click **Posting** > **Post**.
7. On posting the **Purchase Order**, a dialog box appears.
8. Select **Receive** and then click **OK**.
9. See the **Quantity Received** field on the **Lines** FastTab for the posted purchase lines to check whether the posting was successful.



Stop posting synchronous workflow: Scenario 2

Article • 4/3/2023 • 3 min read

1. On the Role Centre, go to **Template > Synchronous Workflows**.
2. On the **Synchronous Workflows list** page, select the **New** action.
The **Synchronous Workflows Card** page opens.
3. On the **General** FastTab, enter the values in the **Reference Type No**, **Code** and **Description** fields.
4. On the **Event Triggers** FastTab, perform the following steps:
 - a. Turn on the **By Hook-in** toggle button.
 - b. Select and enter the value in the **Hook-in Code** field.
 - c. Select the value in the **Break Condition Description** field. Alternatively, choose the **New** action to create a new value.
5. On the action bar, select the **Use Conditions** function.
The **Purchase Header** page opens.
6. In the **Workflow Condition Code** field, enter the code.
After you specify a **Workflow Condition Code**, several fields are automatically populated based on the values specified on the **Table Condition Card** page.
7. Close the page.



Workflow scenario

Article • 4/3/2023 • 1 min read

This section contains examples of Aptean Advanced Workflow(AAW) scenarios.



Example 0

Article • 4/3/2023 • 3 min read

Type: Basic Setup

Department: Workflow

Learning Objective

Aptean Advanced Workflow basic setup into a new database after import of workflow objects in the customer database.

Aptean Advanced Workflow Diagram

.

Aptean Advanced Workflow Basic Setup

Workflow Setup → Set Default Values

.



Example 1

Article • 4/3/2023 • 4 min read

Type: New Dataset

Department: Purchase

Learning Objectives

Workflow Template

The Workflow Template is a superior system created to structure and display business processes within the company. Individual tasks as well as group tasks are specified on the template to ensure full completion of tasks.

Reference Type

A Reference Type assists to define the possible charts and tables based on a Workflow.

To-Do Template

The tasks which have been mentioned above are defined on the To-Do Template, this means specific tasks are linked to specific employees or teams considering various conditions.

Manual Completion

If a task is a Manual Completion, the person responsible for the task must complete the task through one click by hand.

Document Storage

As soon as the Document needed is attached by the person who is responsible for, the task will be completed by default and the document will be stored.



Default Template

Once a Workflow is set as a Basic Template within a Reference Type, every regeneration of a new dataset of the same Reference Type will trigger the same Workflow.

Business Process "New Vendor"

The secretary has to make a new folder and create a new vendor for it furthermore, they need to attach the vendor contract. Once this has been done, the contract is controlled of the right Dimensions and Posting Groups by a member of the Financial Management Team.

Aptean Advanced Workflow Diagram

Aptean Advanced Workflow Setup

Reference Type

No.: 23 (Vendor)

Editing Page ID: 26 (Vendor Card)

Buffer Time on Function Call Server: 10 Seconds

Automatic Workflows: Yes

Keyword Definition Lines

Tick all Use Fields

Table ID: 23 (Vendor)

Keyword Definition Line 1

Field ID: 1 (No.)

Keyword Definition Line 2

Field ID: 2 (Name)



To-Do Templates

To-Do Template 1 Reference Type No.: 23 (Vendor) Code: WF010-TD010 Description: Create Vendor Folder	
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Manual Completion

To-Do Template 2 Reference Type No.: 23 (Vendor) Code: WF010-TD020 Description: Attach Vendor Contract	
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF010-TD010 Duration Date Calculation: 1D
WHAT	Type: Document Storage

To-Do Template 3 Reference Type No.: 23 (Vendor)Code: WF010-TD030Description: Review Dimensions and	
WHO	Team Code: Finance
WHY	No Activation
WHEN	Source Type: To-DoSource Code : WF010-TD020Duration Date Calculation: 1D
WHAT	Type: Manual Completion

Workflow Template

Reference Type No: 23 (Vendor)

Code: WF010

Description: New Vendor

Use Condition: None (Default Template on Reference Type)

Workflow Line 1



Type: To-Do

Code: WF010-TD010

Workflow Line 2

Type: To-Do

Code: WF010-TD020

Workflow Line 3

Type: To-Do

Code: WF010-TD030

Reference Type

Default Template: WF010



Example 2

Article • 4/3/2023 • 4 min read

Type: Basic Notification

Department: Inventory

Learning Objectives

Use Condition

It is important to setup the conditions of a Workflow due to the fact that the condition is the actual trigger of a Workflow. When any change in the business occurs which matches the condition setup, this will trigger the Workflow.

Field Examination Condition

It is necessary to determine all the fields required on the Field Examination Condition. This setup regulates an automatic completion.

Wild Card (Field Value) Condition

A Wild Card is a tool which allows you to make a comparison between the values of two fields.

Field Examination

The Field Examination is completed when all the Mandatory Fields (fields which must be entered) are filled in. The required fields have been set up on the Field Examination Condition before.

Reaction on Condition Discontinuation

In the case that a condition which triggers a Workflow is not given anymore, this is the field where the steps which will follow are setup and defined.



Business Process "Inventory"

If the inventory falls below the Reorder Point, the Purchase Manager will be notified by default (critical stock).

Aptean Advanced Workflow Diagram

Aptean Advanced Workflow Setup

Reference Type

No.: 27 (Item)

Editing Page ID: 30 (Item Card)

Buffer Time on Function Call Server: 30 Seconds

Automatic Workflows: Yes

Keyword Definition Lines

Tick all Use Fields

Table ID: 27 (Item)

Tick all Use Fields

Keyword Definitions Line 1

Field ID: 1 (No.)

Keyword Definitions Line 2

Field ID: 3 (Description)

To-Do Templates

To-Do Template 1 Reference Type No.: 27 (Item) Code: WF020-TD010 Description: Reorder Stock



WHO	Employee Code: BD
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF020-C010

Condition

Table ID: 27 (Item)

Code: WF020-C010

Description: Reorder Stock

Type: Field Examination

All Condition Lines

Active: Yes

Type: Field

Table ID: 27 (Item)

Condition Line 1

Field ID: 68 (Inventory)

Wild Card Values

Wild Card No.: 1

Value Type: Field Value

Field Value Table ID: 27 (Item)

Field Value Field ID: 34 (Reorder Point)

Filter: >%1

Workflow Template

Reference Type No.: 27 (Item)

Code: WF020



Description: Stock Reorder Notification

Reaction on Condition Discontinuation: Keep active

Workflow Line 1

Type: To-Do

Code: WF020-TD010

Use Condition: WF020-C020

Condition

Table ID: 27 (Item)

Code: WF020-C020

Description: Reorder Stock

Type: Workflow Template Use

All Condition Lines:

Active: Yes

Type: Field

Table ID: 27 (Item)

Condition Line 1

Field ID: 11 (Inventory Posting Group)

Filter: RAW MAT

Condition Line 2

Field ID: 68 (Inventory)

Wild Card Values:

Wild Card No.: 1

Value Type: Field Value

Table ID Field Value: 27 (Item)



Field ID Field Value: 34 (Reorder Point)

Filter: <=%1



Example 3

Article • 4/3/2023 • 3 min read

Type: Basic Notification

Department: Receivables (Customer)

Learning Objectives

Critical Date Calculation

This is the field where the time frame of priorities is set, as soon as the given date (e.g. two days before the due date) is reached, the task is shifted and shown as "critical".

Additive Use Condition

There is the possibility to trigger (condition) several Workflows in regards to one record data (e.g. New Customer Workflow + Over Credit Limit Workflow), it is called an Additive Use Condition. This condition is checked continuously to make sure a Workflow is triggered. That is important due to the fact that there is the chance of an already existing Workflow of the same reference type.

Wild Card (Calculation)

Wild Cards of the arithmetic operation can be used to calculate a field value based on a new value (e.g. - 10%) and to compare it with another.

Business Process "Customer nearly over Credit Limit"

When customers have approached 90% of their balance, the accountant is notified by default in this matter. A notification will be sent out to warn the accountant concerning a potential violation of the customer's credit limit.

Aptean Advanced Workflow Diagram

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Aptean Advanced Workflow Setup

Reference Type

- No.: 18 (Customer)
- Editing Page ID: 21 (Customer Card)
- Buffer Time on Function Call Server: 30 Seconds
- Automatic Workflows: Yes
- Keyword Definition Lines
- Tick all Use Fields
- Table ID: 18
- Tick all Use Fields
- Keyword Definitions Line 1
- Field ID: 1 (No.)
- Keyword Definitions Line 2
- Field ID: 2 (Name)

To-Do Templates

To-Do Template 1 Reference Type No.: 18 (Customer) Code: WF030-TD010 Description: Customer nearly over	
WHO	Employee Code: GD
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 7D Critical Date Calculation: -3D
WHAT	Type: Manual Completion



Workflow Template

Reference Type No.: 18 (Customer)

Code: WF030

Description: Nearly Over Credit Limit Notification

Use Condition: WF030-C010

Additional: Yes

Condition

Table ID: 18 (Customer)

Code: WF030-C010

Description: Nearly Over Credit Limit Notification

Type: Workflow Template Use

All Condition Lines

Active: Yes

Type: Field

Table ID: 18 (Customer)

Condition Line 1

Field ID: 20 (Credit Limit (LCY))

Filter: <>0

Condition Line 2

Field ID: 59 (Balance (LCY))

Wild Card Values

Wild Card No.: 1

Value Type: Calculation

Field Value Table ID: 18 (Customer)



Field Value Field ID: 20 (Credit Limit (LCY))

Calculation Formula Value: 0,9*%1 (show column)

Filter: >%1

Workflow Line 1

Type: To-Do

Code: WF030-TD010



Example 4

Article • 4/3/2023 • 4 min read

Type: Basic Notification

Department: Inventory (Item)

Learning Objectives

Wild Card (System Value) in Condition

Wild Cards cannot only be used to compare two field values but also to make a comparison between a field value and a system value (e.g. the Working Date).

Date Calculation in Condition

The exact date on which the condition (trigger) shall eventuate can be calculated (If Work Date – 2 days).

Absence Management

The Absence Management is a system created to shift the tasks of employees (e.g. Salesperson/Purchaser). This is required if an employee is momentary absent or the employee is away for a specific period of time. The tasks of that specific employee will be transmitted to a deputy. As soon as that person is returning, the task will be transmitted back.

Business Process "Expired Lot Number"

Once the current date exceeds the expiration date of an item or a lot, the employee DC from the warehouse is informed by default. This is important to avoid unnecessary occupation of storage. The employee DC is leaving the company for one month due to vacation. Therefore the To-Dos can be forwarded to the employee AH during that period of time.

Aptean Advanced Workflow Diagram

.



Aptean Advanced Workflow Setup

Reference Type

- No.: 32 (Item Ledger Entry)
- Editing Page ID: 38 (Item Ledger Entry)
- Buffer Time on Function Call Server: 30 Seconds
- Automatic Workflows: Yes
- Keyword Definition Lines
- All Keyword Lines
- Table ID: 32 (Item Ledger Entry)
- Tick all Use Fields
- Keyword Definitions Line 1
- Field ID: 2 (Item No.)
- Keyword Definitions Line 2
- Field ID: 6501 (Lot No.)
- Keyword Definitions Line 3
- Field ID: 6503 (Expiration Date)

To-Do Templates

To-Do Template 1 Reference Type No.: 32 (Item Ledger Entry) Code: WF040-TD010 Description: Expired Lot M	
WHO	Employee Code: DC
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 7D Critical Date Calculation: -3D
WHAT	Type: Manual Completion



Workflow Template

Reference Type No.: 32 (Item Ledger Entry)

Code: WF040

Description: Expired Lot Notification

Use Condition: WF040-C010

Condition

Table ID: 32 (Item Ledger Entry)

Code: WF040-C010

Description: Expired Stock

Type: Workflow Template Use

Condition Line 1

Active: Yes

Type: Field

Table ID: 32 (Item Ledger Entry)

Field ID: 6503 (Expiration Date)

Wild Card Values

Wild Card No.: 1

Value Type: System Value

System Value: Work Date

Date Calculation: -2D

Filter: <>"&<%1

Workflow Line 1

Type: To-Do

Code: WF040-TD010



Absence Management on Salesperson/Purchaser Table

Employee: DC

Replaced by: AH

Absence Time

Absence Time: 01.02.2014..28.02.2014

Description: Vacation



Example 5

Article • 4/3/2023 • 6 min read

Type: Basic New Record Workflow

Department: Sales (Customer)

Learning Objectives

To-Do Group Template

To-Dos can be defined as group tasks (To-Do Group) within this template.

Field Modification

Field values can be changed automatically depending on the status of a Workflow, To-Dos or the To-Do Groups.

Team Responsibility

It is in the option to assign a To-Do either to a particular person or to an entire team.

Document Group

The system allows to subordinate several document types within one Document Group (e.g. document types such as "Item Specification" and "Quality Log" can be part of a Document Group e.g. named "Item Documents").

Document Type

The document for attachment is specified in the Document Type and is matched to a Data Table (Reference Type). Furthermore, the default file names are set to automate the location of a document.

Business Process "New Customer"

When a new customer is created, Mandatory Fields will be checked and the Credit Contract attached by the secretary. Subsequently, approvals by various departments will take place: The setup of the Dimension and Posting Group as well as the creditworthiness of the new customer are verified by the Finance Department. Furthermore, the



Warehouse Department arranges all steps which are necessary for shipping. Once this has been done, the new costumer needs to be confirmed by an employee before the contract can be sent out by the secretary.

Aptean Advanced Workflow Diagram

Aptean Advanced Workflow Setup

Reference Type

- No.: 18 (Customer)
- Editing Page ID: 21 (Customer Card)
- Buffer Time on Function Call Server: 30 Seconds
- Automatic Workflows: Yes
- Default Workflow Template Code: WF050
- Keyword Definitions Line 1
- Table ID: 18 (Customer)
- Field ID: 1 (No.)
- Tick all Use Fields
- Keyword Definitions Line 2
- Table ID: 18 (Customer)
- Field ID: 2 (Name)
- Tick All Use Fields

To-Do Templates

To-Do Template 1 Reference Type No.:18 (Costumer) Code: WF050-TD010 Description: Check Mandatory Fie	
WHO	Employee Code: AH



WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF050-C010

Condition

Table ID: 18 (Customer)

Code: WF050-C010

Description: Check Mandatory Fields

Type: Field Examination

All Condition Lines

Active: Yes

Type: Field

Table ID: 18 (Customer)

Process Time ID: 21 (Customer Card)

Condition Line 1

Field ID: 2 (Name)

Filter: <>"

Condition Line 2

Field ID: 21 (Customer Posting Group)

Filter: <>"

Condition Line 3

Field ID: 88 (Gen. Bus. Posting Group)

Filter: <>"

Condition Line 4

Field ID: 110 (VAT. Bus. Posting Group)

Filter: <>"



Condition Line 5

Field ID: 20 (Credit Limit (LCY))

Filter: >0

To-Do Template 2 Reference Type No.:18 (Costumer) Code: WF050-TD020 Description: Attach Credit Applica	
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD010 Duration Date Calculation: 1D
WHAT	Type: Document Storage Att. Document Type Code : Credit application

Document Group

Code: CONTRACT

Description: Contracts

Directory Path Name: C:\Temp\

Insert Record Link Yes

File Filter:

Display Order: 1

File Filter Code: PDF

File Filter

Code: PDF

Description: PDF

Filter: *PDF

Document Type

Reference Type: 18 (Customer)

Code: CREDIT APPLICATION



Description: Credit Application

Document Group: CONTRACT

Table Join (automatic request)

Table ID: 5128007 (Workflow)

Table ID to join: 18 (Customer)

Table Join Line 1

Field ID: 1 (No.)

Value Type: Field

Value: 26 (Assigned To No.)

To-Do Template 3 Reference Type No.:18 (Costumer) Code: WF050-TD030 Description: Review Dimensions a	
WHO	Team Code: FINANCE
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD020 Duration Date Calculation: 2D Critical Date Calcula
WHAT	Type: Manual Completion

To-Do Template 4 Reference Type No.:18 (Costumer) Code: WF050-TD040 Description: Credit and Backgrou	
WHO	Team Code: ACCOUNTS
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD020 Duration Date Calculation: 2D Critical Date Calcula
WHAT	Type:Manual Completion

To-Do Template 5 Reference Type No.:18 (Costumer) Code: WF050-TD050 Description: Setup Shipping Fields	
WHO	Team Code: Warehouse
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD020 Duration Date Calculation: 2D Critical Date Calculation:-1D



WHAT	Type: Manual Completion
------	-------------------------

To-Do Group Template

Reference Type No.: 18 (Customer)

Code: WF050-TG010

Description: Examination by Departments

To-Do Group Line 1

Type: To-Do

Code: WF050-TD030

To-Do Group Line 2

Type: To-Do

Code: WF050-TD040

To-Do Group Line 3

Type: To-Do

Code: WF050-TD050

To-Do Template 6 Reference Type No.:18 (Costumer) Code: WF050-TD060 Description: Approve New Custom	
WHO	Employee Code: PS
WHY	No Activation
WHEN	Source Type: To-Do Group Source Code: WF050-TDG010 Duration Date Calculation: 2D Critical Date Calculation:-1D
WHAT	Type: Manual Completion

To-Do Template 7 Reference Type No.:18 (Costumer) Code: WF050-TD070 Description: Send Engagement Le	
WHO	Employee Code: AH
WHY	No Activation



WHEN	Source Type: To-Do Source Code: WF050-TD060 Duration Date Calculation: 1D
WHAT	Type: Document Storage Att. Document Type Code: Customer Contract

Document Group

Code: CONTRACT

Description: Contracts

Directory Path Name: C:\Temp\

Insert Record Link: Yes

File Filter:

Display Order: 1

File Filter Code: PDF

File Filter

Code: PDF

Description: PDF

Filter: *.PDF

Document Type

Reference Type: 18 (Customer)

Code: CUSTOMER CONTRACT

Description: Customer Contract

Document Group: Contract

Workflow Template

Reference Type No.: 18 (Customer)

Code: WF050



Description: New Customer

Use Condition: None (Default Workflow Template on Reference Type)

Workflow Line 1

Type: To-Do

Code: WF050-TD010

Workflow Line 2

Type: To-Do

Code: WF050-TD020

Workflow Line 3

Type: To-Do Group

Code: WF050-TG010

Workflow Line 4

Type: To-Do

Code: WF050-TD060

Workflow Line 5

Type: To-Do

Code: WF050-TD070

Field Modification Line 1:

Old Status Level Filter: 0..14

New Status Level Filter: <>2

Field ID: 39 (Blocked)

Fix Value Input: All

Field Modification Line 2:

Old Status Level Filter: 0..14

New Status Level Filter: 2



Field ID: 39 (Blocked)

Fix Value Input: [Option Value is empty]

Fix Value: 0



Example 6

Article • 4/3/2023 • 6 min read

Type: Basic New Record Workflow

Department: Human Resources

Learning Objectives

Activation Condition

If an Activation Condition is met, the To-Do is created in regards to that specific condition. If the condition is not met, the task will be created admittedly but get the status of "no status".

Decision (Document Examination)

In terms of a Document Examination, it is possible to tick off a ballot box which causes that a document is revised in regards to Decisions.

Absence Management

The Absence Management is a system created to shift the tasks of employees (e.g. Salesperson/Purchaser). This is required if an employee is momentary absent or the employee is away for a specific period of time. The tasks of that specific employee will be transmitted to a deputy. As soon as that person is returning, the task will be transmitted back.

Business Process "New Employee"

If a new employee is hired, the Secretary looks if all Mandatory Fields for the company are filled in (fields such as Name, Employment Date, Employee Contract Code and Social Security Number), then they attach the contract. The Human Resource Department revises the employment contract and the IT Manager takes care of the computer installation, setups and accesses needed by the New Employee (cell phone in addition). Simultaneously, the Financial Management reports the tax and superannuation forms and can requests a union membership number.

Aptean Advanced Workflow Diagram



Aptean Advanced Workflow Setup

Reference Type

- No.: 5200 (Employee)
- Editing Page ID: 5200 (Employee Card)
- Buffer Time on Function Call Server: 30 Seconds
- Automatic Workflows: Yes
- Keyword Definition Lines
- Tick all Use Fields
- Table ID: 5200 (Employee)
- Tick all Use Fields
- Keyword Definitions Line 1
- Field ID: 1 (No.)
- Keyword Definitions Line 2
- Field ID: 2 (First Name)
- Keyword Definitions Line 3
- Field ID: 4 (Last Name)

To-Do Templates

To-Do Template 1 Reference Type No.: 5200 (Employee) Code: WF060-TD010 Description: Check Mandatory	
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF060-C010



Condition

Table ID: 5200 (Employee)

Code: WF060-C010

Description: Check Mandatory Fields

Type: Field Examination

All Condition Lines

Active: Yes

Type: Field

Table ID: 5200 (Employee)

Editing Form ID: 5200 (Employee Card)

Condition Line 1

Field ID: 2 (First Name)

Filter: <>"

Condition Line 2

Field ID: 4 (Last Name)

Filter: <>"

Condition Line 3

Field ID: 29 (Employment Date)

Filter: <>"

Condition Line 4

Field ID: 27 (Employmt. Contract Code)

Filter: <>"

Condition Line 5

Field ID: 21 (Social Security No.)

Filter: <>"



To-Do Template 2 Reference Type No.: 5200 (Employee) Code: WF060-TD020 Description: Attach Employee C	
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD010 Duration: 1D
WAS	Type: Document Storage

To-Do Template 3 Reference Type No.: 5200 (Employee) Code: WF060-TD030 Description: Examine Employee	
WHO	Team Code: HR
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD020 Duration Date Calculation: 2D Duration Date Calcula -1D
WHAT	Type: Decision Decision Option Set Code: Code: EXAMINATION Description: Examination Option Ex option Line 1 Value: OK Description: Ok Examination Option Line 1 Value: NOT OK Description: Not Decision Option Code: EXAMINATION Document Examination Activate: Yes Document Storage To-D Template: WF060-TD020

To-Do Template 4 Reference Type No.: 5200 (Employee) Code: WF060-TD040 Description: Book Trainings and	
WHO	Team Code: HR
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD030 Duration Date Calculation: 2D Critical Date Calcula
WHAT	Type: Manual Completion

To-Do Template 5 Reference Type No.: 5200 (Employee) Code: WF060-TD050 Description: Setup Computer a	
WHO	Employee Code: MP
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD020 Duration Date Calculation: 2D Critical Date Calcula
WHAT	Type: Manual Completion



To-Do Template 6 Reference Type No.: 5200 (Employee) Code: WF060-TD060 Description: Organize Mobile P	
WHO	Employee Code: MP
WHY	Activation Condition Code: Table ID: 5200 (Employee) Code: WF060-C020 Description: Management Employee Type: Activation Condition Line 1 Active: Yes Art: Field Table ID: 5200 (Employee) Field ID: (Employmt. Contract Code) Filter: Management Condition Code: WF060-C020
WHEN	Source Type: To-Do Source Code: WF060-TD050 Duration Date Calculation: 2D Critical Date Calcula -1D
WHAT	Type: Field Examination

Field Examination

Table ID: 5200 (Employee)

Code: WF060-C030

Description: Check Mobile Phone No.

Type: Field Examination

Condition Line 1

Active: Yes

Art: Field

Table ID: 5200 (Employee)

Editing Form ID: 5200 (Employment Card)

Field ID: 14 (Mobile Phone No.)

Filter: <>"

To-Do Template 7 Reference Type No.: 5200 (Employee) Code: WF060-TD070 Description: Complete Tax and	
WHO	Team Code: Pay Role
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD020 Duration Date Calculation: 2D Critical Date Calcula



WHAT	Type: Manual Completion
------	-------------------------

To-Do Template 8 Reference Type No.: 5200 (Employee) Code: WF060-TD080 Description: Apply for Union M	
WHO	Team Code: Pay Role
WHY	Activation Condition Code: Table ID: 5200 (Employee) Code: WF060-C040 Description: Union Type: Active: Yes Art: Field Table ID: 5200 (Employee) Field ID: 22 (Union Code) Filter: <>" Condition Code
WHEN	Source Type: To-Do Source Code: WF060-TD070 Duration Date Calculation: 2D Critical Date Calcula
WHAT	Type: Field Examination

Field Examination Condition

Table ID: 5200 (Employee)

Code: WF060-C050

Description: Check Union Membership No.

Type: Field Examination

Condition Line 1

Active: Yes

Type: Field

Table ID: 5200 (Employee)

Editing Form ID: 5200 (Employee Card)

Field ID: 23 (Union Membership No.)

Filter: <>"

Workflow Template

Reference Type No.: 5200 (Employee)

Code: WF060

Description: New Employee Workflow



Aptean Advanced Workflow

Use Condition: WF060-C060

Condition

Table ID: 5200 (Employee)

Code: WF060-C060

Description: New Employee

Type: Workflow Template Use

Condition Line 1

Active: Yes

Type: Field

Table ID: 5200 (Employee)

Field ID: 29 (Employment Date)

Wild Card Values

Wild Card No.: 1

Value Type: System Value

System Value: Workdate

Filter: >=%1

Workflow Lines

Type: To-Do

Code: To-Do 1-8



Example 7

Article • 4/3/2023 • 5 min read

Type: Basic Process Workflows

Department: Sales

Learning Objectives

Source Offset Data Calculation

When a task is provided with a Source Offset Data Calculation formula, the calculated start date will be moved antedate or will be postponed in regards to the specified value.

Timeframe referred to Reference Table

When the Source Type of a task has been chosen to be a Reference Table, the task will start in dependence of the value of a defined field on the Reference Table.

Editing Form on Workflow Template

The indication of an Editing Form ID within a Workflow Template supports the setup of an Editing Form ID in the Reference Type. Consequently, this can be overwritten and the data source is opened on a detached site.

Table Join

The definition of a Table Join makes it possible that the system has access to the data of two tables. Only a connection up to two tables is possible.

Business Process "Pre Sales Shipment Workflow"

The Logistic Manager books the truck and confirms the appointment two days prior to the due day. They then compiles the order picking and adds the list to the loading list and updates the Shipping No. In addition, export documents can be created for foreign customers.



Aptean Advanced Workflow Diagram

Aptean Advanced Workflow Setup

Reference Type

No.: 36 (Sales Header)

Buffer Time on Function Call Server: 30 Seconds

Automatic Workflows: Yes

Keyword Definitions Lines

Tick all use Fields

Table ID: 36 (Sales Header)

Tick all use Fields

Keyword Definitions Line 1

Field ID: 3 (No.)

Keyword Definitions Line 2

Field ID: 79 (Sell-to Customer Name)

Table Join

Table ID: 36 (Sales Header)

Table ID to join: 18 (Customer)

Table Join Line 1

Field ID: 1 (No.)

Value Type: Field

Value: 2 (Sell-to Customer No.)



To-Do Templates

To-Do Template 1 Reference Type No.:36 (Sales Header) Code: WF070-TD010 Description: Book Truck and Co	
WHO	Employee Code: BA
WHY	No Activation
WHEN	Source Type: Reference Table Source Field: 21 (Shipment Date) Source Offset Date Calculation: -2D Calculation: 2D Critical date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 2 Reference Type No.:36 (Sales Header) Code: WF070-TD020 Description: Prepare Con Note	
WHO	Employee Code: BA
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Manual Completion

To-Do Template 3 Reference Type No.:36 (Sales Header) Code: WF070-TD030 Description: Update Package T	
WHO	Employee Code: BA
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF070-TD020 Duration Date Calculation: 1D
WHAT	Type:Field Examination Condition Code: WF070-C010

Condition

Table ID: 36 (Sales Header)

Code: WF070-C010

Description: Check Package Tracking No.

Type: Field Examination

Condition Line 1



Active: Yes

Type: Field

Table ID: 36 (Sales Header)

Field ID: 106 (Tracking No.)

Filter: <>''

Editing Page ID: 42 (Sales Order)

To-Do Group Template

Reference Type No.: 36 (Sales Header)

Code: WF070-TG010

Description: Transport Tasks

To-Do Group Lines

Type: To-Do

To-Do Group Line1

Code: WF070-TD010

To-Do Group Line 2

Code: WF070-020

To-Do Group Line 3

Code: WF070-030

To-Do Template 4 Reference Type No.:36 (Sales Header) Code: WF070-TD040 Description: Prepare Export Doc	
WHO	Employee Code: BA
WHY	Condition Code Table ID: 36 (Sales Header) Code: WF070-C020 Description: Foreign Customer Type Condition Line 1 Active: Yes Type: Field Table ID: 36 (Sales Header) Field ID: 31 (Customer Posting G FOREIGN Condition Code: WF070-C020
WHEN	Source Type: To-Do Source Code: WF070-TG010 Duration Date Calculation: 2D Duration Date Calcu



WHAT	Type: Manual Completion
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Workflow Template

Reference Type No.: 36 (Sales Header)

Code: WF070

Description: Pre Sales Shipment Workflow

Editing Page ID: 42 (Sales Order)

Use Condition: WF070-C030

Condition

Table ID: 36 (Sales Order)

Code: WF070-C030

Description: Sales Order Ready to Ship

Type: Workflow Template Use

Condition Line 1

Active: Yes

Type: Field

Table ID: 36 (Sales Header)

Field ID: 1 (Document Type)

Filter: Order

Condition Line 2

Active: Yes

Type: Field

Table ID: 36 (Sales Header)

Field ID: 120 (Status)

Filter: Released



Condition Line 3

Active: Yes

Type: Field

Table ID: 18 (Customer)

Field ID: 39 (Blocked)

Filter: [Option Value is empty]

Workflow Line 1

Type: To-do Group

Code: WF070-TG010

Workflow Line 2

Type: To-Do

Code: WF070-TD040



Example 8

Article • 4/3/2023 • 6 min read

Type: Basic Process Workflow

Department: CRM

Learning Objectives

Consolidation of the learning objectives so far.

Business Process "Costumer Complaint"

Once a customer complaint comes in, fields such as evaluation and comment has to be checked, it must be made sure that those fields are filled in. If this is the case, an employee will take further steps. One week (or more) after the complaint, the customer is contacted by an employee from the Purchase Team via telephone. If the evaluation turns out to be very adverse, the case is forwarded to a customer advisor. An Apologize Letter will be sent to foreign customers and a meeting will be arranged for in-country customers. To ascertain intended improvements, both customers again could be approached by phone after one month.

Aptean Advanced Workflow Diagram

.

Aptean Advanced Workflow Setup

Table Join

Table ID: 5065 (Interaction Log Entry)

Table ID to join: 5050 (Contact)

Table Join Line 1

Field ID: 1 (No.)

Value Type: Field

Value: 3 (Contact Company No.)



Reference Type

- No.: 5065 (Interaction Log Entry)
- Editing Page ID: 5076 (Interaction Control Log Entry)
- Buffer Time on Function Call Server: 30 Seconds
- Automatic Workflows: Yes
- Keyword Definition
- Keyword Definitions Line 1
- Table ID: 5065 (Interaction Control Log Entry)
- Field ID: 3 (Contact Company No.)
- Tick all Use Fields
- Keyword Definitions Line 2
- Table ID: 5050 (Contact)
- Field ID: 5052 (Company Name)
- Tick all Field Use

To-Do Templates

To-Do Template 1 Reference Type No.: 5065 (Interaction Control Log Entry) Code: WF080-TD010 Description	
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Art: Field Examination

Condition

- Table ID: 5065 (Interaction Log Entry)
- Code: WF080-B010



Description: Check Mandatory Fields

Type: Field Examination

Condition Line 1

Active: Yes

Type: Field

Table ID: 5065 (Interaction Log Entry)

Field ID: 19 (Evaluation)

Filter: <> [Option Value empty]

Editing Form ID: 5076 (Interaction Log Entry)

Condition Line 2

Active: Yes

Type: Field

Table ID: 5065 (Interaction Log Entry)

Field ID: 43 (Comment)

Filter: Yes

Editing Form ID: 5076 (Interaction Log Entry)

To-Do Template 2 Reference Type No.: 5065 (Interaction Log Entry) Code: WF080-TD020 Description: Follow A	
WHO	Employee Code: PS
WHY	No Activation
WHEN	Source Type: Reference Date Source Field ID: 4 (Date) Source Offset Date Calculation: 1W Duration Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 3 Reference Type No.: 5065 (Interaction Log Entry) Code: WF080-TD030 Description: Send A	
WHO	Employee Code: LM



WHY	Activation Condition Table ID: 5065 (Activation Condition) Code: WF080-C020 Description: V. Neg. Foreign Cust Type: Activation Condition Line 1 Active: Yes Type: Field Table ID: 5065 (Interaction Log Entry) Field ID: 19 (Evaluation) Filter: very negative Condition Line 2 Active: Yes Type: Field Table ID: 5050 (Contact) Field ID: 15 (Territory Code) Filter: Foreign Condition Code: WF080-B020
WHEN	Source Type: To-Do Source Code: WF080-TD020 Duration Date Calculation: 1W
WHAT	Type: Document Storage Att. Document Type Code: LETTER (Table join by default) Table Join Table ID: 5128007 (Workflow) Table ID to join: 5065 (Interaction Log Entry) Table Join Line 1 Field ID: 1 (Entry No.) Value Type: Field Value: 23 (Assigned To Entry No.)

Document Group

Code: POST

Description: Posting

Directory Path Name: C:\Temp\

Insert Record Link: YES

Document Type

Reference Type: 5065 (Interaction Log Entry)

Code: LETTER

Description: Letter of Complaint

Document Group: POST

To-Do Template 4 Reference Type No.: 5065 (Interaction Log Entry) Code: WF080-TD040 Description: Organizational	
WHO	Employee Code: LM
WHY	Activation Condition Table ID: 5065 (Interaction Log Entry) Code: WF080-C030 Description: V.Neg Type: Activation Condition Line 1 Aktiv: Yes Type: Field Table ID: 5065 (Interaction Log Entry) Field ID: 19 (Evaluation) Filter: very negative Condition Line 2 Active: Yes Type: Field Table ID: 5050 (Contact) Field ID: 15 (Territory Code) Filter: Foreign Condition Code: WF080-C030
WHEN	Source Type: To-Do Source Code: WF080-TD020 Duration Date Calculation: 1W
WHAT	Type: Manual Completion



To-Do Template 5 Reference Type No.: 5065 (Interaction Log Entry) Code: WF080-TD050 Description: Follow	
WHO	Employee Code: LM
WHY	Activation Condition Table ID: 5065 (Interaction Log Entry) Code: WF080-C040 Description: Very Ne Condition Line 1 Active: Yes Type: Field Table ID: 5065 (Activation Condition) Field ID: 19 (Evaluation Code: WF080-B040
WHEN	Source Type: To-Do Group Source Code: WF080-TG010 Source Offset Date Calculation: 1M Duratio Calculation: -3D
WHAT	Type: Manual Completion

To-Do Group Template

Reference Type No.: 5065 (Interaction Log Entry)

Code: WF080-TG010

Description: Very Negative Complaint

To-Do Group Line 1

Type: To-Do

Code: WF080-TD030

To-Do Group Line 2

Type: To-Do

Code: WF080-TD040

Workflows Template

Reference Type No.: 5065 (Interaction Log Entry)

Code: WF080

Description: Costumer Complaint Workflow

Condition

Table ID: 5065 (Interaction Log Entry)



Aptean Advanced Workflow

Code: WF080-C050

Description: Complaint Interaction

Type: Workflow Template Use

Condition Line 1

Active: Yes

Type: Field

Table ID: 5065 (Interaction Log Entry)

Field ID: 13 (Interaction Template Code)

Filter: S_RET_ORD [Sales claim]

Use Condition: WF080-C050

Workflow Line 1

Type: To-Do

Code: WF080-TD010

Workflow Line 2

Type: To-Do

Code: WF080-TD020

Workflow Line 3

Type: To-Do Group

Code: WF080-TG010

Workflow Line 4

Type: To-Do

Code: WF080-TD050



Example 9

Article • 4/3/2023 • 3 min read

Type: Advanced Notification

Department: Sales

Learning Objectives

Trigger for Workflow

The time when a Workflow shall take place can be controlled by the Trigger e.g. in the case of dataset change.

Reaction to changed Reference Type

If a dataset has been changed, further steps which will follow are defined in this field. The fields are connected to the Field Change Activity Log, this then narrows down the fields which will cause a reaction.

Field Change Activity Log

The Change Activity Log Field makes it possible to delete and recreate a Workflow in case that one of the selected fields have been changed (Combination Setup: Reaction to changed Reference Type Field: Delete when Field changes).

Business Process "Notification for Customer Changes"

The Sales Manager is informed on each and every change on the customer cards via notification.

Aptean Advanced Workflow Diagram

.

Aptean Advanced Workflow Setup



Reference Type

No.: 18 (Customer)

Editing Page ID: 21 (Customer)

Buffer Time on Function Call Server: 10 Seconds

Automatic Workflows: Yes

Keyword Definitions

Keyword Definitions Line 1

Table ID: 18 (Customer)

Field ID: 1 (No.)

Tick all Use Field

Keyword Definitions Line 2

Table ID: 18 (Customer)

Field ID: 2 (Name)

Tick all Use Field

To-Do Template

To-Do Template 1 Reference Type No.: 18 (Customer) Code: WF090-TD010 Description: Customer Field Chan	
WHO	Employee Code: PS
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

Workflow Template

Reference Type.: 18 (Customer)



Code: WF090

Description: Customer Field Change Notification

Reaction on Changed Source: Delete

Use Condition: WF090-C010

Additional: Yes

Condition

Table ID: 18 (Customer)

Code: WF090-C010

Description: Dummy Examination

Type: Workflow Template Use

Condition Line 1

Active: Yes

Type: Field

Table ID: 18 (Customer)

Field ID: 1 (No.)

Filter: <>"

Workflow Line 1

Type: To-Do

Code: WF090-TD010

Trigger:

On Modify: Yes

Event Triggers

On Modify: Yes



Example 10

Article • 4/3/2023 • 6 min read

Example 10

Type: Advanced Notification

Department: Sales

Learning Objectives

Priorities (To-Do)

With the use of priorities, To-Dos can be further differentiated which then supports the determination of status levels.

Priorities (Condition)

After the Priorities had been defined, the conditions are revised. As soon as a condition matches the highest Priority, a Workflow is created. If the condition does not match the highest Priority, the condition is compared with the second highest Priority, the third highest priority and so forth.

Status Change Notification

Once the status of a To-Do has changed, an employee or a team will be informed via an e-mail notification. This can be that a notification is setup on the Status Change Notification.

Date Monitoring

The To-Do Type Date Monitoring allows the examination of two data fields within a specified period of time. If the examination results negatively, the To-Dos will open up.

Reaction on Condition Discontinuation

If the data set which triggers a Workflow has been deleted, further steps of the process are defined in this field.



Keywords on To-Do Templates

Keywords on To-Do Templates control the field information of a data set which are shown on selected To-Dos, this information can also be sent through e-mails.

Business Process "Notification on Delivery Date"

The Sales Manager is on notice on Requested Delivery Dates which cannot be met via notification. So therefore the Sales Manager will be able to inform the correlating costumer in this matter.

Aptean Advanced Workflow Setup

Table Join

Table ID: 37 (Sales Line)

Table ID to join: 36 (Sales Header)

Table Join Line 1

Field ID: 1 (Document Type)

Value Type: Field

Value: 1 (Document Type)

Table Join Line 2

Field ID: 3 (No.)

Value Type: Field

Value: 3 (Document No.)

Reference Type

No.: 37 (Sales Line)

Buffer Time on Function Call Server: 10 Seconds

Automatic Workflows: Yes



Keyword Definition Lines

Tick all Use Fields

Keyword Definitions Line 1

Table ID: 37 (Sales Line)

Field ID: 3 (Document Type)

Keyword Definitions Line 2

Table ID: 36 (Sales Header)

Field ID: 79 (Sell-to Customer Name)

Keyword Definitions Line 3

Table ID: 37 (Sales Line)

Field ID: 11 (Description)

To-Do Template

To-Do Template 1 Reference Type No: 37 (Sales Line) Code: WF100-TD010 Description: Promised Del. Date w	
WHO	Employee Code: PS
WHY	No Activation
WHEN	Source Type: Reference Table Source Field: 5791 (Promised Delivery Date) Source Offset Date Calcul Calculation: -7D Critical Date Calculation: -3D
WHAT	Type: Date Monitoring Date to monitor Table ID: 37 (Sales Line) Field ID: 5794 (Planned Delivery Da Type: Reference Table Source Table ID: 37 (Sales Line) Source Field ID: 5791 (Promised Delivery Date Date Calculation Date Monitoring): -2D Time Frame: 2D

Status Change Notification

Status Change Notification Line 1

Old Status Level Filter: 0..14

New Status Level Filter: <>2



E-Mail Responsible Team/ Person: Yes

Employee Code: TZ

Keyword Definitions

Keyword Definition Lines

Tick all Use Fields

Table ID: 37 (Sales Line)

Keyword Definitions Line 1

Field ID: 5794 (Planned Delivery Date)

Keyword Definitions Line 2

Field ID: 5791 (Promised Delivery Date)

Workflow Template

Reference Type No.: 37 (Sales Line)

Code: WF100

Description: Promised Del. Date will not be met

Reaction on Condition Discontinuation: Hold

Reaction on Deleted Source: Hold

Use Condition: WF100-C010

Priority Level: 1 (show column)

Condition

Table ID: 37 (Sales Line)

Code: WF100-C010

Description: Order Promise

Type: Workflow Template Use

All Condition Lines



Table ID: 37 (Sales Line)

Condition Line 1

Active: Yes

Type: Field

Field ID: 1 (Document Type)

Filter: Order

Condition Line 2

Active: Yes

Type: Field

Field ID: 5791 (Promised Delivery Date)

Filter: <>''

Workflow Line 1

Type: To-Do

Code: WF100-TD010

Editing Page ID: 42 (Sales Order)

Differing Table ID (Editing Table): 36 (Sales Header)

To-Do Template

To-Do Template 1 Reference Type No: 37 (Sales Line) Code: WF105-TD010 Description: Requested Del. Date	
WHO	Employee Code: PS
WHY	No Activation
WHEN	Source Type: Reference Table Source Field: 5790 (Requested Delivery Date) Source Offset Date Calc Duration Date Calculation: -7D Critical Date Calculation: -3D
WHAT	Type: Date Monitoring Date to monitor Table ID: 37 (Sales Line) Field ID: 5794 (Planned Delivery Date) Date Source Type: Reference Table Source Table ID: 37 (Sales Line) Source Field ID: 5790(Requested Delivery Date) Time Frame Source Offset Date Calculation (Date Monitoring): -3D Time Frame: 5D



Keyword Definitions

Keyword Definition Lines:

Tick all use Fields

Table ID: 37 (Sales Line)

Keyword Definitions Line 1

Field ID: 5794 (Planned Delivery Date)

Keyword Definitions Line 2

Field ID: 5790 (Requested Delivery Date)

Workflow Template

Reference Type No.: 37 (Sales Line)

Code: WF105

Description: Requested Del. Date will not be met

Use Condition: WF105-C010

Priority Level: 2

(make field visible via "choose columns")

Condition

Table ID: 37 (Sales Line)

Code: WF105-C010

Description: Order Request

Type: Workflow Template Use

All Condition Lines

Table ID: 37 (Sales Line)

Condition Line 1



Aptean Advanced Workflow

Active: Yes

Type: Field

Field ID: 1 (Document Type)

Filter: Order

Condition Line 2

Active: Yes

Type: Field

Field ID: 5790 (Requested Delivery Date)

Filter: <>"

Workflow Line 1

Type: To-Do

Code: WF105-TD010

Editing Page ID: 42 (Sales Order)

Differing Table ID (Editing Table): 36 (Sales Header)



Example 11

Article • 4/3/2023 • 3 min read

Type: Recurring Notification

Department: CRM

Learning Objectives

Conditional Responsibilities

It is possible to connect specific To-Dos to specific employees using the conditions.

Recurring To-Do

Furthermore, it is possible to define a task as being repeated after a specific period of time.

Business Process "Monthly Phone Call Alert"

The most important costumers of the company are contacted monthly by the Sales Manager, who is in charge of (they will be reminded by an alert system).

Aptean Advanced Workflow Setup

Reference Type

No.: 5050 (Contact)

Editing Form ID: 5050 (Contact Card)

Buffer Time on Function Call Server: 30 Seconds

Automatic Workflows: Yes

Keyword Definitions:



Tick all Use Fields

Table ID: 5050 (Contact)

Keyword Definitions Line 1

Field ID: 2 (Name)

Keyword Definitions Line 1

Field ID: 9 (Phone No.)

Table Join

Table ID: 5050 (Contact)

Table ID to join: 5089 (Contact Profile Answer)

Table Join Line 1

Field ID: 1 (Contact No.)

Field Value: Field

Value: 1 (No.)

To-Do Template

To-Do Template 1 Reference Type No: 5050 (Contact) Code: WF110-TD010 Description: Monthly Account Mg	
WHO	Employee Code: PS Conditional Responsibility based on Salesperson Conditional Responsibilities C Responsibilities Line 1 Condition Code: WF110-C010 Condition Table ID: 5050 (Contact) Code: WF1 Description: Salesperson John Roberts Type: Responsibility Condition Line 1 Active: Yes Type: Field T (Contact) Field ID: 29 (Salesperson Code) Filter: JR Employee Code: JR Conditional Responsibilities L Condition Code: WF110-C020 Condition Table ID: 5050 (Contact) Code: WF110-C020 Description: S Linda Martin Type: Responsibility Condition Line 1 Active: Yes Type: Field Table ID: 5050 (Contact) Fi (Salesperson Code) Filter: LM Employee Code: LM
WHY	No Activation
WHEN	Source Type: Workflow DurationDate Calculation: 2DDuration Date Calculation: -1DRecurring: YesRe Interval: 1M Calc. Due Date from: Closing Date
WHAT	Type: Manual Completion



Workflow Template

Reference Type No.: 5050 (Contact)

Code: WF110

Description: Monthly Account Mgt. Phone Call

Use Condition: WF110-C030

Condition

Table ID: 5050 (Contact)

Code: WF110-C030

Description: Top 25% Costumer

Type: Workflow Template Use

Condition Line 1

Active: Yes

Type ID: 5089 (Contact Profile Answer)

Field ID: 5 (Answer)

Filter: Top 25% Costumer

[Warning: Lookup not possible, need to be copied from the profile questionnaire]

Workflow Line 1

Type: To-Do

Code: WF110-TD010



Example 12

Article • 4/3/2023 • 5 min read

Type: Advanced Approval Process Workflow

Department: Payables

Learning Objectives

Decision

It is possible to lodge a decision as an option to a To-Do and as soon as an employee who is responsible for this decision has made the decision, the To-do is completed by default. Next steps in the work process will be activated depending on the decision which had been made.

Business Process "Payment Approval"

Payments of over 1000 Euro are checked and possibly approved by the Accountant and then can be paid by the Secretary afterwards. In addition, an inquiry of payment decisions in a different currency will be sent to the Financial Manager for approval or rejection.

Aptean Advanced Workflow Setup

Reference Type

No.: 81 (Gen. Journal Line)

Buffer Time on Function Call Server: 30 Seconds

Automatic Workflows: Yes

Keyword Definition Lines

Tick all Use Fields.

Table ID: 81 (Gen. Journal Line)



Tick all Use Fields

Keyword Definitions Line 1

Field ID: 4 (Account No.)

Keyword Definitions Line 2

Field ID: 11 (Bal. Account No.)

Keyword Definitions Line 3

Field ID: 13 (Amount)

Keyword Definitions Line 4

Field ID: 12 (Currency Code)

To-Do Template

To-Do Template 1 Reference Type No: 81 (Gen. Journal Line) Code:WF120-TD010 Description: Approve Payment	
WHO	Employee Code: GS Conditional Responsibility based on Currency Code Conditional Responsibility Conditional Responsibilities Line 1 Condition Code: WF120-C010 Condition Table ID: 81 (Gen. Journal Line) Code: WF120-C010 Description: Currency Type: Responsibility Condition Line 1 Active: Yes Type: Responsibility Field Table ID: 81 (Gen. Journal Line) Field ID: 12 (Currency Code) Filter: <>" Employee Code: HA
WHY	No Activation
WHEN	Source Type: WorkflowDuration Date Calculation: 1D
WHAT	Type:Decision Code: APPROVAL Decision Option Set Code Code: APPROVAL Description: Approve Reject Decision Option Set Line 1 Value: Approved Description: Approved Decision Option Set Line Value: Rejected Description: Rejected Decision Option Set Code:APPROVAL

To-Do Template 2 Reference Type No: 81 (Gen. Journal Line) Code: WF120-TD020 Description: Payment Rejection	
WHO	Employee Code: AH
WHY	By Decision Type No.: 81 (Gen. Journal Line)Decision To-Do Template Code: WF120-TD010 Decision Value Filter: Rejected
WHEN	Source Type: To-Do Source Code: WF120-TD010 Duration Date Calculation: 1D
WHAT	Type: Manual Completion



To-Do Template 3 Reference Type No: 81 (Gen. Journal Line) Code: WF120-TD030 Description: Payment Appr	
WHO	Employee Code: AH
WHY	By Decision Type No: 81 (Gen. Journal Line) By Decision Template Code: WF120-TD010 Decision Val Filter: Approved
WHEN	Source Type: To-Do Source Code: WF120-TD010 Duration: 1D
WHAT	Type: Manual Completion

Field Modifications

Field Modification Line 1

Old Status Level Filter: 0..14

New Status Level Filter: 2

Table ID: 81 (Gen. Journal Line)

Field ID: 34 (On Hold)

Fix Value Input: [Field Value is empty]

Workflow Template

Reference Type: 81 (Gen. Journal Line)

Code: WF120

Description: Payment Authorize

Editing Page ID.: 256 (Payment Journal)

Use Condition: WF120-C020

Condition

Table ID: 81 (Gen. Journal Line)

Code: WF120-C020

Description: Vendor Payment

Type: Workflow Use Condition



All Condition Lines

Active: Yes

Type: Field

Table ID: 81 (Gen. Journal Line)

Condition Line 1

Field ID: 6 (Document Type)

Filter: Payment

Condition Line 2

Field ID: 3 (Account Type)

Filter: Vendor

Condition Line 3

Field ID: 16 (Amount (LCY))

Filter: > 1000

Use Condition: WF120-C030

Condition

Table ID: 81 (Gen. Journal Line)

Code: WF120-C030

Description: Vendor Balance Payment

Type: Workflow Use Condition

All Condition Lines

Active: Yes

Type: Field

Table ID: 81 (Gen. Journal Line)

Condition Line 1

Field ID: 6 (Document Type)



Filter: Payment

Condition Line 2

Field ID: 63 (Bal. Account Type)

Filter: Vendor

Condition Line 3

Field ID: 16 (Amount (LCY))

Filter: <-1000

Workflow Line 1

Type: To-Do

Code: WF120-TD010

Workflow Line 2

Type: To-Do

Code: WF120-TD020

Workflow Line 3

Type: To-Do

Code: WF120-TD030

Field Modification

Field Modification Line 1

Old Status Level Filter: 0..14

New Status Level Filter: >2

Table ID: 81 (Gen. Journal Line)

Field ID: 34 (On Hold)

Fix Value Input: Yes



Development

Standard NAV does not stop a Gen. Journal Line that is On Hold from being posted. So to enforce the approval process it is necessary to put a small piece of code in Codeunit 11 (directly at the beginning).

```
// >> Aptean Advanced Workflow example
```

```
TESTFIELD("On Hold","");
```

```
// << Aptean Advanced Workflow example
```



Example 13

Article • 4/3/2023 • 8 min read

Type: Advanced Process Workflow

Department: Manufacturing

Learning Objectives

Loop

Loop Groups are defined in the To-Do Group Template, the last To-Do which have been completed controls the continuation of the Loop. When the Loop is rerun, all the To-Dos will open up within the Loop.

File name Template in Document Storage

There is the possible to indicate an exact document name (e.g. Item@No.@) and furthermore, to name the place where the document should be stored (e.g. D:\Itempicture\). If a To-Do is a Document Storage, the system will prove the availability of a document within the specified directory. Once a document is determined by the system, the To-Do will be completed by default. Moreover, a linkage will be created between the document and the To-Do is deposited at the data source facultative.

Manual Completion allowed by

If a To-Do is not a Manual Completion, this is the field where it can be decided who the person will have the authority to complete the To-Do manually.

Business Process "New Production Item"

If the designer has developed a new product, that person will check all the required fields, attaches the product specifications and completes the bill of material. Accordingly, a prototype can be created as well as tested by the Production Team and a Testing Sheet attached. If insecurities concerning the quality are detected, the Production Team can then talk to the designer about the issues. If the product has passed the quality test, the new product can be released for new production.



Aptean Advanced Workflow Setup

Reference Type

- No.: 27 (Item)
- Editing Form ID: 30 (item Card)
- Buffer Time on Function Call Server: 30 Seconds
- Automatic Workflows: Yes
- Keyword Definitions
- Tick All Use Fields
- Table ID: 27 (Item)
- Keyword Definition Line 1
- Field ID: 1 (No.)
- Keyword Definition Line 2
- Field ID: 3 (Description)

To-Do Template

To-Do Template 1 Reference Type No: 27 (Item) Code: WF130-TD010 Description: Check Mandatory Fields	
WHO	Employee Code: MD Modification allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D Critical Date Calculation: -1D
WHAT	Type: Field Examination Condition Code: WF130-C010

Condition

- Table ID: 27 (Item)
- Code: WF130-C010



Description: Check Mandatory Fields

Type: Field Examination

All Condition Lines

Active: Field Examinations

Type: Field

Table ID: 27 (Item)

Editing Page ID: 30 (Item Card)

Condition Line 1

Field ID: 3 (Description)

Filter: <>''

Condition Line 2

Field ID: 8 (Base Unit of Measure)

Filter: <>''

Condition Line 3

Field ID: 11 (Inventory Posting Group)

Filter: Finished

Condition Line 4

Field ID: 99 (VAT. Prod. Posting Group)

Filter: VAT16

Condition Line 5

Field ID: 91 (Gen. Prod. Posting Group)

Filter: Retail

Condition Line 6

Field ID: 54 (Blocked)

Filter: Yes



To-Do Template 2 Reference Type No.: 27 (Item) Code: WF130-TD02 Description: Attach Product Specification	
WHO	Employee Code: MD
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF130-TD01 Duration: 2D Urgency: -1D
WHAT	Type: Document Storage Attach. Doc. Type Code: PRODSPEZ [Table Join by default] Table Join Table ID: 5128007 (Workflow) Table ID to join: 27 (Item) Table Join Line 1 Field ID: 1 (No.) Value Type: Field Value: 26 (Assigned to No.)

Document Group

Reference Type: 27

Code: ITEM DOCS

Description: Item Document

Directory Path Name: C:\Temp\

Insert Record Link: Yes

File Filter:

Display Order No.: 1

File Filter Code: PDF

File Filter

Code: PDF

Description: PDF

Filter: *.PDF

Document Type

Reference Type: 27 (Item)

Code: PRODSPEZ

Description: Item Specification



To-Do Template

To-Do Template 3 Reference Type No.: 27 (Item) Code: WF130-TD030Description: Complete BOM and Routing	
WHO	Employee Code: MD
WHY	No Activation
WHEN	Source Type: To-Do Source Code : WF130-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Field Examination Condition Code: WF130-C020

Condition

Table ID: 27 (Item)

Code: WF130-C020

Description: Check Manufacturing Fields

Type: Field Examination

All Condition Lines

Active: Yes

Type: Field

Table ID: 27 (Item)

Editing Page ID: 30 (Item Card)

Condition Line 1

Field ID: 99000751 (Production BOM No.)

Filter: <>"

Condition Line 2

Field ID: 99000750 (Routing No.)

Filter: <>"



Condition Line 3

Field ID: 24 (Standard Cost)

Filter: >0

To-Do Template 4 Reference Type No.: 27 (Item) Code: WF130-TD040 Description: Create Prototype	
WHO	Team Code: Production
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF130-TD030 Duration Date Calculation: 2W Critical Date Calculation: -10D
WHAT	Type: Manual Completion

To-Do Template 5 Reference Type No.: 27 (Item) Code: WF130-TD050 Description: Quality Test and Attach Te	
WHO	Team Code: Production
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF130-TD040 Duration Date Calculation: 2D Critical Date Calcula
WHAT	Type: Document Storage Attach Doc. Type Code: TEST SHEET

Document Type

Reference Type: 27 (Item)

Code: TEST SHEET

Description: Quality Test Sheet

File Name Default: @@Item%%No.@@_TEST

Document Group: ITEM DOCS

[Table Join by Default]

Table Join

Table ID: 5127903 (Attach Document)



Table ID to join: 27 (Item)

Table Join Line 1

Field ID: 1 (No.)

Value Type: Field

Value: 4 (Reference Code)

To-Do Template 6 Reference Type No.: 27 (Item) Code: WF130-TD060 Description: Passed Quality Test?	
WHO	Employee Code: RL
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF130-TD050 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Attach Doc. Type Code: QUALITY PASSED

Decision Option Set

Code: QUALITY PASSED

Description: Passed Quality Test?

Decision Option Set Line 1:

Value: YES

Description: Yes

Decision Option Set Line 2:

Value: NO

Description: No

Decision Option Set Line 3:

Value: MAYBE

Description: Maybe



To-Do Template 7 Reference Type No.: 27 (Item) Code: WF130-TD070 Description: Review by QC Supervisor	
WHO	Employee Code: MD
WHY	By Decision Type: 27 (Item) By Decision To-Do Template Code: WF130-TD060 Decision Value Filter: MAYBE
WHEN	Source Type: To-Do Source Code: WF130-TD060 Duration Date Calculation: 1D
WHAT	Type: Manual Completion

To-Do Template 8 Reference Type No.: 27 (Item) Code: WF130-TD080 Description: Approved for Production	
WHO	Employee Code: MD
WHY	By Decision Type: 27 (Item) By Decision To-Do Template Code: WF130-TD060 Decision Value Filter: YES
WHEN	Source Type: To-Do Source Code: WF130-TD060 Duration Date Calculation: 1D
WHAT	Type: Manual Completion

To-Do Group Template

Reference Type: 27 (Item)

Code: WF130-TDG010

Description: Product Development

[Customize This Page → FastTabs: Show "Loop"]

Loop Group Activate: Yes

Loop Group Start To-Do: WF130-TD020

Loop Group End To-Do: WF130-TD0060

Loop Group Decision Value: No

Loop Group Use Reopen Date: Yes

To-Do Group Line 1

Type: To-Do



Code: WF130-TD020

To-Do Group Line 2

Type: To-Do

Code: WF130-TD030

To-Do Group Line 3

Type: To-Do

Code: WF120-TD040

To-Do Group Line 4

Type: To-Do

Code: WF130-TD050

To-Do Group Line 5

Type: To-Do

Code: WF130-TD060

Workflow Template

Reference Type: 27 (Item)

Code: WF130

Description: New Manufactured Item Workflow

Use Condition: WF130-C030

Condition

Table ID: 27 (Item)

Code: WF130-C030

Description: New Manufactured Item

Type: Workflow Template Use

Condition Line 1



Active: Yes

Type: Field

Table ID: 27 (Item)

Field ID: 5419 (Replenishment System)

Filter: Prod. Order

Workflow Line 1

Type: To-Do

Code: WF130-TD010

Workflow Line 2

Type: To-Do Group

Code: WF130-TG010

Workflow Line 3

Type: To-Do

Code: WF130-TD080

Field Modification

Asynchronous Field Modification Line 1:

Old Status Level Filter: 0..14

New Status Level Filter: <>2

Field ID: 54 (Blocked)

Fixed Value Input: Yes

Asynchronous Field Modification Line 2:

Old Status Level Filter: 0..14

New Status Level Filter: 2

Field ID: 54 (Blocked)

Fixed Value Input: NO



Example 14

Article • 4/3/2023 • 9 min read

Type: Advanced Approval Process Workflow

Department: Purchasing

Learning Objectives

Multi Line Examination:

A Workflow can be executed on a Master Table (Head Table) and is able to implement examinations through sub tables (Line Table). This helps to find out if a particular amount out of all lines has been reached. For this purpose, setups conforming a FlowField are established. The possible options which are available are Amount, Existing, Minimum, Maximum and Average.

Flexible Teams/Employees:

The responsibility of a To-Do Template can be organized to be instructed towards an employee or a team. In addition, it is possible to setup which employee or team specifically will be responsible depending on the field value of the data set. For this purpose, fields which include references such as employee, user, user or employee establishments can be used.

Consolidation of the learning objectives so far

Business Process "Purchase Order Approval":

Purchases of the amount below 1.000 Euro are directly performed by the Purchasers but if the amount of a purchase is over 1.000 Euro, the head of department will be notified and an approval is necessary to release the purchase. Furthermore, a notification of purchases over 25.000 Euro is sent to the CFO who again will approve or reject the order and the head of department is also informed. Purchases Orders over 50.000 have to be released by the CEO before and the CFO will be notified in case of rejection.



Aptean Advanced Workflow Setup

Table Join

Table ID: 38 (Purchase Header)

Table ID to join: 39 (Purchase Line)

Table Join Line 1

Field ID: 1 (Document Type)

Value Type: Field

Value: 1 (Document Type)

Table Join Line 2

Field ID: 3 (No.)

Value Type: Field

Value: 3 (No.)

Reference Type

No.: 38 (Sales Header)

Buffer Time on Function Call Server:: 30 Seconds

Automatic Workflows: Yes

Keyword Definition Lines

Tick all Use Fields

Keyword Definitions Line 1

Table ID: 38 (Purchase Header)

Field ID: 3 (No.)

Keyword Definitions Line 2

Table ID: 38 (Purchase Header)



Field ID: 79 (Buy-from Vendor Name)

Keyword Definitions Line 3

Table ID: 39 (Purchase Line)

Field ID: 11 (Description)

No.: 39 (Sales Line)

Buffer Time on Function Call Server: 30 Seconds

Automatic Workflows: Yes

To-Do Template

To-Do Template 1 Reference Type No:38 (Purchase Header) Code: WF140-TD010 Description:Department Ma	
WHO	Team Code: WKFLADMIN Conditional Responsibility based on Department Code Conditional Respo Conditional Responsibilities Line 1 Condition Code: WF140-C010 Condition Table ID: 38 (Purchase WF140-C010 Description: Sales Department Type: Responsibility Condition Line 1 Active: Yes Type: (Purchase Header) Field ID :29 (Shortcut Dimension 1 Code) Filter: Sales Employee Code: PS Condit Responsibilities Line 2 Condition Code: WF140-C020 Condition Table ID: 38 (Purchase Header) Cod Description: Production Department Type: Responsibility Condition Line 1 Active: Yes Type: Field Tab (Purchase Header) Field ID: 29 (Shortcut Dimension 1 Code) Filter: Prod Employee Code: PS Condit Responsibilities Line 3 Condition Code: WF140-C030 Condition Table ID: 38 (Purchase Header) Cod Description: Administration Depart. Type: Responsibility Condition Line 1 Active: Yes Type: Field Tab (Purchase Header) Field ID:29 (Shortcut Dimension 1 Code) Filter: Adm Employee Code: AH
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: Examination Description: Examination Decision Option S OK Description: Ok Decision Option Set Line 1 Value: Not OK Description: Not Ok Decision Option S EXAMINATION

Field Modification

Field Modification Line 1:

Old Status Level Filter: 0..14



New Status Level Filter: <>2

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Fix Value Input: Pending Approval

Field Modification Line 2:

Old Status Level Filter: 0..12

New Status Level Filter: 2

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Fix Value Input: Released

To-Do Template 2 Reference Type No:38 (Sales Header) Code: WF140-TD010 Description: Purchase Rejected	
WHO	Team Code: Purchase Employee Table Choice: Employee (Sales Person/ Purchaser) Table ID: 38 (Purchase Header) Employee Field ID: 43 (Purchaser Code)
WHY	By Decision Type No: 38 (Purchase Header) By Decision Template Code: WF140-TD010 Decision Value: Pending Approval
WHEN	Source Type: To-Do Source Code: WF140-TD010 Duration Date Calculation: 1D
WHAT	Type: Manual Completion

Field Modification

Field Modification Line 1:

Old Status Level Filter: 0..14

New Status Level Filter: 0..14

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Fix Value Input: Pending Approval



To-Do Template 3 Reference Type No:38 (Purchase Header) Code: WF140-TD030 Description:CFO Approve	
WHO	Employee Code: HA
WHY	By Decision Type No.: 38 (Purchase Header) By Decision Template Code: WF140-TD010 Decision Value Filter: Ok Condition Code: WF140-C040 Activation Condition Table ID: 38 (Purchase Header) Code: WF140-C040 Description: Lime Amount > 25000 Type: Activation Condition Line 1 Active: Yes Type: Field Table ID: 38 (Purchase Header) Field ID: 103 Line Amount) Filter: >25000 Multi Line Check: Sum Additional Condition: WF140-C050 Additional Condition Table ID: 38 Code: WF140-B050 Description: Only Item Lines Condition Line 1 Table ID: 39 (Purchase Line) Field ID: 5 (Type) Filter: Item
WHEN	Source Type: To-Do Source Code: WF140-TD010 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type:Decision Decision Option Set Code: EXAMINATION

Field Modification

Field Modification Line 1:

Old Status Level Filter: 0..14

New Status Level Filter: <>2

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Fix Value Input: Pending Approval

Field Modification Line 2:

Old Status Level Filter: 0..14

New Status Level Filter: 2

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Fix Value Input: Released

To-Do Template 4 Reference Type No:38 (Purchase Header) Code: WF140-TD040 Description:Purchase Rejec



WHO	Team Code: WKFLADMIN Conditional Responsibility based on Department Code Conditional Responsibilities Conditional Responsibility Line 1 Condition Code: WF140-C010 Employee Code: PS Conditional Responsibility Line 2 Condition Code: WF140-C020 Employee Code: TZ Conditional Responsibility Line 3 Condition Code: WF140-C030 Employee Code: AH
WHY	By Decision Type No.: 38 (Purchase Header) By Decision Template Code: WF140-TD030 Decision Value Filter: Not Ok
WHEN	Source Type: To-Do Source Code: WF140-TD030 Duration Date Calculation: 1D
WHAT	Type : Manual Completion

Field Modification

Filed Modification Line 1:

Old Status Level Filter: 0..14

New Status Level Filter: 0..14

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Fixed Value Input: Pending Approval

To-Do Template 5 Reference Type No:38 (Purchase Header) Code: WF140-TD050 Description: Approve	
WHO	Employee Code: JR
WHY	Condition Code: WF140-C060 By Decision Type No.: 38 (Purchase Header) By Decision Template Code: WF140-TD030 Decision Value Filter:Ok
WHEN	Source Type: To-Do Source Code: WF140-TD030 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type : Decision Decision Option Set Code: EXAMINATION

Activation Condition

Table ID: 38 (Purchase Header)

Code: WF140-C060



Description: Line Amount > 50000

Type: Activation

Condition Line 1

Active: Yes

Type: Field

Table ID: 39 (Purchase Line)

Field ID: 103 (Line Amount)

Filter: >50000

Multi Line Check: Sum

Additional Condition: WF140-C050

Field Modification

Field Modification Line 1:

Old Status Level Filter: 0..14

New Status Level Filter: <>2

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Fixed Value Input: Pending Approval

Field Modification 2:

Old Status Level Filter: 0..14

New Status Level Filter: 2

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Fixed Value Input: Released



To-Do Template 6 Reference Type No:38 (Purchase Header) Code: WF140-TD060 Description: Purchase Rejected	
WHO	Employee Code: JR
WHY	By Decision Type No.: 38 (Purchase Header) By Decision Template Code: WF140-TD050 Decision Value Filter:NotOk
WHEN	Source Type: To-Do Source Code: WF140-TD050 Duration Date Calculation: 1D
WHAT	Type :Manual Completion

Field Modification

Field Modification Line 1:

Old Status Level Filter: 0..14

New Status Level Filter: 0..14

Table ID: 38 (Sales Header)

Field ID: 120 (Status)

Fix Value Input: Pending Approval

To-Do Template 7 Reference Type No:38 (Purchase Header) Code: WF140-TD070 Description: Purchase Approved	
WHO	Team Code: Purchase Conditional Responsibility based on Purchaser Conditional Responsibility Conditional Responsibility Line 1 Condition Code: WF140-C010 Employee Code: PS Conditional Responsibility Line 2 Condition Code: WF140-C020 Employee Code: TZ Conditional Responsibility Line 3 Condition Code: WF140-C030 Employee Code: AH
WHY	Condition Code: WF140-C070 Activation Condition Table ID: 38 (Purchase Header) Code: WF140-C070 Description: Purchase Released Type: Activation Condition Line 1 Active: Yes Type: Field Table ID: 38 (Purchase Header) Field ID: 120 (Status) Filter: Released
WHEN	Source Type: To-Do Group Source Code: WF140-TG010 Duration Date Calculation: 1D
WHAT	Type :Manual Completion

To-Do Group Template

Reference Type: 38 (Purchase Header)



Code: WF140-TG010

Description: Purchase Order Approval

To-Do Group Line 1

Type: To-Do

Code: WF140-TD010

To-Do Group Line 2

Type: To-Do

Code: WF140-TD020

To-Do Group Line 3

Type: To-Do

Code: WF140-TD030

To-Do Group Line 4

Type: To-Do

Code: WF140-TD040

To-Do Group Line 5

Type: To-Do

Code: WF140-TD050

To-Do Group Line 6

Type: To-Do

Code: WF140-TD060

Workflow Template

Reference Type: 38 (Purchase Header)

Code: WF140

Description: Purchase Order Approval



Reference Editing Form: 50 (Purchase Order)

Use Condition: WF140-C080

Condition

Table ID: 38 (Purchase Header)

Code: WF140-C080

Description: Purchase Order Approval Required

Type: Workflow Use Condition

All Condition Lines

Active: Yes

Type: Field

Condition Line 1

Table ID: 38 (Purchase Header)

Field ID: 1 (Document Type)

Filter: Order

Condition Line 2

Table ID: 39 (Purchase Line)

Field ID: 103 (Line Amount)

Filter: > 1000

Multi Line Check: Sum

Additional Condition: WF140-C050

Condition Line 3

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Filter: <>Released

Workflow Line 1



Type: To-Do Group

Code: WF140-TG010

Workflow Line 2

Type: To-Do

Code: WF140-TD070



Example 15

Article • 4/3/2023 • 10 min read

Example 15

Type: Advanced Process Workflow

Department: Purchase (International)

Learning Objectives

Interdependency of Workflows:

To-Dos of a Workflow can be influenced by other To-Dos of a different Workflow (e.g. depending on the starting day).

Consolidation of the learning objectives so far

Business Process "International Purchase":

Each and every order process starts with sending an order and attaching the supplier order confirmation, this is done by an employee of the Purchase Team. If the costs have not been revised, this needs to be done by the purchaser who is in charge of. In the case of an import order, import documentation are attached additionally and are sent to the freight forwarder. Furthermore, the bill of loading is attached and the foreign trade fields completed. The costs for each purchase line are examined and the expected receipt day will be confirmed. In case of delayed delivery, the Production Department (If Production Item) or the Sales Department will be informed in this matter.

Aptean Advanced Workflow Setup

Reference Type

No.: 38 (Purchase Header)

Buffer Time on Function Call Server: 30 Seconds

Automatic Workflows: Yes



Keyword Definitions

Keyword Definitions Line 1

Table ID: 38 (Purchase Header)

Field ID: 3 (No.)

Tick all Use Fields.

Keyword Definitions Line 2

Table ID: 38 (Purchase Header)

Field ID: 79 (Buy-from Vendor Name)

Tick all Use Fields.

To-Do Template

To-Do Template 1 Reference Type No.:38 (Purchase Header) Code: WF150-TD010 Description: Send Purchase	
WHO	Team Code: Purchase
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Manual Completion

To-Do Template 2 Reference Type No.: 38 (Purchase Header) Code: WF150-TD020 Description: Attach Purcha	
WHO	Team Code: Purchase
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF150-TD010 Duration Date Calculation: 7D Critical Date Calcula
WHAT	Type: Document Storage Att. Document Type Code: ORDER CONFIRM [Table Join by default] Table (Workflow) Table to join ID: 38 (Purchase Header) Table Join Line 1 Field ID: 1 (Document Type) Valu (Assigned to Art) Table Join Line 2 Field ID: 3 (Document No.) Value Type: Field Value: 26 (Assigned



Document Group

Code: PURCHASE DOCS

Description: Purchase Documents

Directory Path Name: C:\Temp\

Insert Record Link: Yes

File Filter:

Display Order: 1

File Filter Code: PDF

File Filter

Code: PDF

Description: PDF

Filter: *.PDF

Document Type

Reference Type: 38 (Purchase Header)

Code: ORDER CONFIRM

Description: Order Confirmation

File Name Format: @@Purchase Header%%No.@@

Document Group: PURCHASE DOCS

[Table Join by default]

Table Join

Table ID: 5127903 (Attach Document)

Table to join ID: 38 (Purchase Header)

Table Join Line 1

Field ID: 3 (No.)



Value Type: Field

Value: 4 (Reference Type Code)

To-Do Template 3 Reference Type No.: 38 (Purchase Header) Code: WF150-TD030 Description: Costs to be cl	
WHO	Team Code: Purchase
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF150-TD020 Duration Date Calculation: 2D Critical Date Calcula
WHAT	Type:Decision Decision Option Set Code: EXAMINATION Description: Examination Decision Decision Description: Ok Decision Option Set Line 2 Value: NOT OK Description: Not Ok Decision Option Set

Workflow Template

Reference Type No.: 38 (Purchase Header)

Code: WF150

Description: All Purchase Orders Workflow

Editing Form ID: 50 (Purchase Order)

Use Condition: WF150-C010

Condition

Table ID: 38 (Purchase Header)

Code: WF150-C010

Description: Released Purchase Order

Type: Workflow Use Condition

Condition Line 1

Active: Yes

Type: Field

Table ID: 38 (Purchase Header)

Field ID: 1 (Document Type)



Filter: Order

Condition Line2

Active: Yes

Type: Field

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Filter: Released

Workflow Line 1

Type: To-Do

Code: WF150- TD 010

Workflow Line 2

Type: To-Do

Code: WF150- TD 020

Workflow Line 3

Type: To-Do Group

Code: WF150- TD 030

To-Do Template

To-Do Template 1 Reference Type No.: 38 (Purchase Header) Code: WF150-TD010 Description: Attach Import	
WHO	Team Code: Purchase
WHY	No Activation
WHEN	Source Workflow Template Code: WF150 Source Type: To-Do Source Code: WF150-TD010 Duration: 7D Critical Date Calculation: -3D
WHAT	Type: Document Storage Attach. Doc. Type Filter: Sales Invoice Country of Origin



Document Group

Code: PURCHASE DOCS

Description: Purchase Documents

Directory Path Name: C:\Temp\

Insert Record Link: Yes

File Filter:

Display Order: 1

File Filter Code: PDF

File Filter

Code: PDF

Description: PDF

Filter: *.PDF

Document Type

Reference Type No: 38 (Purchase Header)

Code: SALES INVOICE

Description: Sales Invoice

Document Group: PURCHASE DOCS

Document Type

Reference Type No: 38 (Purchase Header)

Code: COUNTRY OF ORIGIN

Description: Country of Origin Certificate

Document Group: PURCHASE DOCS



To-Do Template 2 Reference Type No.:38 (Purchase Header) Code: WF150-TD020 Description: Send Import D	
WHO	Team Code: Purchase
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF152-TD010 Duration Date Calculation: 1D
WHAT	Type: Manual Completion

To-Do Template 3 Reference Type No.:38 (Purchase Header) Code: WF150-TD030 Description: Attach Bill Boa	
WHO	Team Code: Purchase
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF152-TD020 Duration Date Calculation: 1D Critical Date Calcula -3D
WHAT	Type: Document Storage

To-Do Template 4 Reference Type No.:38 (Purchase Header) Code: WF150-TD040 Description: Complete Fore	
WHO	Team Code: Purchase
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF152-TD030 Durer: 1D
WHAT	Type: Field Examination Condition Code: WF152-C010

Condition

Table ID: 38 (Purchase Header)

Code: WF152-C010

Description: Check Foreign Trade Fields

Type: Field Examination

All Condition Lines

Active: Yes

Type: Field



Table ID: 38 (Purchase Header)

Editing Form ID: 50 (Purchase Order)

Filter: <>''

Condition Line 1

Field ID: 32 (Currency Code)

Condition Line 2

Field ID: 76 (Transaction Type)

Condition Line 3

Field ID: 102 (Transaction Specification)

Condition Line 4

Field ID: 77 (Transport Method)

Condition Line 5

Field ID: 97 (Entry Point)

Condition Line 6

Field ID: 101 (Area)

Workflow Template

Reference Type: 38 (Purchase Header)

Code: WF152

Description: Import PO Workflow

Reference Editing Form ID: 50 (Purchase Order)

Use Condition: WF150-C010

Activation Condition

Table ID: 38 (Purchase Header)

Code: WF152-C020



Description: Import Po

Type: Activation

Condition Line 1

Active: Yes

Type: Field

Field ID: 31 (Vendor Posting Group)

Filter: Foreign

Condition Code: WF152-C020

Workflow Line 1

Type: To-Do

Code: WF152-TD010

Workflow Line 2

Type: To-Do

Code: WF152-TD020

Workflow Line 3

Type: To-Do

Code: WF152-TD030

Workflow Line 4

Type: To-Do

Code: WF152-TD040

Table Joins

Table ID: 39 (Purchase Line)

Table to join ID: 38 (Purchase Header)

Table Join Line 1



Field ID: 1 (Document Type)

Value Type: Field

Value: 1 (Document Type)

Table Join Line 2

Field ID: 3 (No.)

Value Type: Field

Value: 3 (Document No.)

Table ID: 39 (Purchase Line)

Table to join ID: 27 (Item)

Table Join Line 1

Field ID: 1 (No.)

Value Type: Field

Value: 6 (No.)

Reference Type

No.: 39 (Purchase Line)

Buffer Time on Function Call Server: 30 Seconds

Automatic Workflows: Yes

Workflow Numbers: WKFL

Keyword Definitions

Keyword Definitions Line 1

Table ID: 39 (Purchase Line)

Field ID: 3 (Document Type)

Tick all Use Fields

Keyword Definitions Line 2



Table ID: 38 (Purchase Header)

Field ID: 79 (Buy-from Vendor Name)

Tick all Use Fields

Keyword Definitions Line 3

Table ID: 39 (Purchase Line)

Field ID: 11 (Description)

Tick all Use Fields

To-Do Template

To-Do Template 1 Reference Type No:38 (Purchase Line) Code: WF154-TD010 Description:Department Purchase	
WHO	Team Code: Purchase Conditional Responsibility based on Department Code Conditional Responsibility Conditional Responsibilities Line 1 Condition Code: WF140-C010 Condition Table ID: 39(Purchase L WF154-C020 Description: Furniture Item Purchase Line Type: Responsibility Condition Line 1 Active Field Table ID: 39 (Purchase Line) Field ID :5709 (Item Category Code) Filter: Furniture Employee Co Conditional Responsibilities Line 2 Condition Code: WF154-C020 Condition Table ID: 39 (Purchase L Code: WF154-C020 Description:Misc. Item Purchase Line Type: Responsibility Condition Line 1 Activ Type: Field Table ID: 39 (Purchase Line) Field ID: 5709 (Item Category Code) Filter: MISC Employee C
WHY	By Decision Type No: 38 (Purchase Header) By Decision Workflow Template Code: WF150 By Decisi Template Code: WF150-TD030 Decision Value Filter: YES
WHEN	Reference Type No.: 38 (Purchase Header Source Workflow Template Code: WF150 Source Type: To Source Code: WF150-TD030 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 2 Reference Type No.:39 (Purchase Line) Code: WF154-TD020 DescriptionConfirm Expected	
WHO	Team Code:Purchase
WHY	No Administrator
WHEN	Reference Type No.: 38 (Purchase Header) Source Workflow Template Code: WF152 Source Type: W Difference Calculation: 7D Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion



To-Do Template 3 Reference Type No:39 (Purchase Line) Code: WF154-TD030 Description:Notification Delay	
WHO	Employee Code: TZ Conditional Responsibility based on Department Code Conditional Responsibility Responsibilities Line 1 Condition Code: WF154-C030 Condition Table ID: 39 (Purchase Line) Code: V Description: Raw mat Purchase Type: Responsibility Condition Line 1 Active: Yes Type: Field Table ID: Field ID :11 (Inventory Posting Group) Filter: Raw Mat Employee Code: TZ
WHY	No Activation
WHEN	Source Type: Reference Table Source Field: 5790 (Requested Delivery Date) Time Difference Calculat Date Calculation: 7D Critical Date Calculation: -3D
WHAT	Type:Date Monitoring Date to monitor Table ID: 39 (Purchase Line) Field ID: 10 (Expected Receipt D Source Type: Reference Table Herkunft TableID: 39 (Purchase Line) Herkunft Field ID: 5790 (Request Time frame Time Difference Calculation (Date Monitoring): -2D Time Frame: 4D

Keyword Definitions

Keyword Definitions Line 1

Table ID: 39 (Purchase Line)

Field ID: 5790 (Requested Receipt Date)

Tick all Use Fields

Keyword Definitions Line 2

Table ID: 39 (Purchase Line)

Field ID: 10 (Expected Receipt Date)

Tick all Use Fields

Workflow Template

Reference Type: 39 (Purchase Line)

Code: WF154

Description: All Po Lines Workflow

Reference Editing Form ID: 50 (Purchase Order)



Buffering Table ID (Editing Form): 38 (Purchase Header)

Use Condition: WF154-C040

Condition

Table ID: 39 (Purchase Line)

Code: WF154-C040

Description: Released Purchase Order Line

Type: Workflow Use Condition

Condition Line 1

Active: Yes

Type: Field

Table ID: 39 (Purchase Line)

Field ID: 1 (Document Type)

Filter: Order

Condition Line 2

Active: Yes

Type: Field

Table ID: 38 (Purchase Header)

Field ID: 120 (Status)

Filter: Released

Workflow Line 1

Type: To-Do

Code: WF154-TD010

Workflow Line 2

Type: To-Do

Code: WF154-TD020



Workflow Line 3

Type: To-Do

Code: WF154-TD030



Example 16

Article • 4/3/2023 • 6 min read

Type: Advanced Process Workflow

Department: Finance

Learning Objectives

Deadline Time:

You can specify the time when a To-Do shall be completed under Deadline Time.

Modify allowed by (when not open):

Open To-Dos are assigned to specific employees with authority to work on open To-Dos.

Business Process "Monthly Account Statements":

Monthly Account Statement are finished by the finance team. In order to complete these, orders of the Purchase Manager, Sales of the Sales Manager and production orders of the Production Manager have to be finalized first. Once this has been done, the Warehouse Manager can execute a stocktake. The accountant then can prepare the process of payment and close the debtor's file. Following this, the Sales Manager draws up a sales report in order that the Finance Team is able to complete the monthly account statements. If a New Fiscal Year starts, the Yearly Financial Statements will be appointed and the fiscal year and income statement will be closed additionally.

Aptean Advanced Workflow Setup

Reference Type

No.: 50 (Accounting Period)

Editing Page ID: 100 (Accounting Period)

Buffer Time on Function Call Server: 10 Seconds



Automatic Workflows: Yes

Keyword Definitions

Keyword Definitions Line 1

Table ID: 50 (Accounting Period)

Field ID: 1 (Starting Date)

Tick all Use Fields

To-Do Template

To-Do Template 1 Reference Type No.: 50 (Accounting Period) Code: WF160-TD010 Description: Finalize Purchase Order	
WHO	Employee Code: BD Modify allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: Workflow Duration : 1D Deadline Time: 12:00
WHAT	Type: Manual Completion

To-Do Template 2 Reference Type No.: 50 (Accounting Period) Code: WF160-TD020 Description: Finalize Sales Order	
WHO	Employee Code: PS Modify allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: Workflow Duration : 1D Deadline Time: 12:00
WHAT	Type: Manual Completion

To-Do Template 3 Reference Type No.: 50 (Accounting Period) Code: WF160-TD030 Description: Finalize Procurement Order	
WHO	Employee Code: RL Modify allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: Workflow Duration : 1D Deadline Time: 12:00
WHAT	Type: Manual Completion



To-Do Group Template

Reference Type No.: 50 (Accounting Period)

Code: WF160-TG010

Description: Pre Stocktake Tasks

To-Do Group Line 1

Type: To-Do

Code: WF160-TD010

To-Do Group Line 2

Type: To-Do

Code: WF160-TD020

To-Do Group Line 3

Type: To-Do

Code: WF160-TD030

To-Do Template 4 Reference Type No.: 50 (Accounting Period) Code: WF160-TD040 Description: Payment Ru	
WHO	Employee Code: GS Modify allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF160-TD010 Source Field: 5128414 (End Date Planned) Duratio : 1D Deadline Time: 15:00
WHAT	Type: Manual Completion

To-Do Template 5 Reference Type No.: 50 (Accounting Period) Code: WF160-TD050 Description: Costumer S	
WHO	Employee Code: GS Modify allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF160-TD020 Source Field: 5128414 (End Date Planned) Duratio Deadline Time: 15:00



WHAT	Type: Manual Completion
------	-------------------------

To-Do Template 6 Reference Type No.: 50 (Accounting Period) Code: WF160-TD060 Description: Stocktake	
WHO	Employee Code: DK Modify allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: To-Do Group Source Code: WF160-TD010 Source Field: 51(End Date Planned) Duration : 1D Deadline Time: 17:00
WHAT	Type: Manual Completion

To-Do Group Template

Reference Type No.: 50 (Accounting Period)

Code: WF160-TG020

Description: Department EOM Tasks

To-Do Group Line 1

Type: To-Do Group

Code: WF160-TG010

To-Do Group Line 2

Type: To-Do

Code: WF160-TD040

To-Do Group Line 3

Type: To-Do

Code: WF160-TD050

To-Do Group Line 4

Type: To-Do

Code: WF160-TD060



To-Do Template 7 Reference Type No.: 50 (Accounting Period) Code: WF160-TD070 Description: Change Allow	
WHO	Employee Code: HA Modify allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: To-Do Group Source Code: WF160-TD020 Duration : 1D
WHAT	Type: Manual Completion

To-Do Template 8 Reference Type No.: 50 (Accounting Period) Code: WF160-TD080 Description: EOM Sales F	
WHO	Team Code:PS Modify allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF160-TD070 Source Field: 51(End Date Planned) Duration : 3D Urgency: -1D
WHAT	Type: Manual Completion

To-Do Template 9 Reference Type No.: 50 (Accounting Period) Code: WF160-TD090 Description: Monthly Acco	
WHO	Team Code:Finance Modify allowed by (when not open): Administrator
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF160-TD070 Source Field: 51(End Date Planned) Duration : 3D U
WHAT	Type: Manual Completion

To-Do Template 10 Reference Type No.: 50 (Accounting Period) Code: WF160-TD100 Description: Yearly Acco	
WHO	Team Code:Finance Modify allowed by (when not open): Administrator
WHY	Activation Code: WF160-C010
WHEN	Source Type: To-Do Source Code: WF160-TD090 Duration : 1M Urgency: -7D
WHAT	Type: Manual Completion



Activation Condition

Table ID: 50 (Accounting Period)

Code: WF160-C010

Description: New Fiscal Year

Type: Activation

Condition Line 1

Active: Yes

Type: Field

Table ID: 50 (Accounting Period)

Field ID: 3 (New Fiscal Year)

Filter: Yes

To-Do Template 11 Reference Type No.: 50 (Accounting Period) Code: WF160-TD110 DescriptionClose Fiscal	
WHO	Team Code:Finance Modify allowed by (when not open): Administrator
WHY	Activation Code: WF160-C010
WHEN	Source Type: To-Do Source Code: WF160-TD100 Duration : 1D
WHAT	Type: Manual Completion

Workflow Template

Reference Type No.: 50 (Accounting Period)

Code: WF160

Description: EOM-EOY Workflow

Use Condition: WF160-C020

More Options -> Navigate -> Use Conditions

Condition



Table ID: 50 (Accounting Period)

Code: WF160-C020

Description: New Month

Type: Workflow Use Condition

Condition Line 1

Active: Yes

Table ID: 50 (Accounting Period)

Field ID: 1 (Starting Date)

Filter: >01.01.10

Workflow Line 1

Type: To-Do Group

Code: WF160-TG020

Workflow Line 2

Type: To-Do

Code: WF160-TD070

Workflow Line 3

Type: To-Do

Code: WF160-TD080

Workflow Line 4

Type: To-Do

Code: WF160-TD090

Workflow Line 5

Type: To-Do

Code: WF160-TD100

Workflow Line 6



Type: To-Do

Code: WF160-TD110



Example 17

Article • 4/3/2023 • 3 min read

Type: Check before Transaction is completed

Department: Sales

Learning Objectives

Hook-in:

Within Dynamics NAV there are specific Insert Codes such as Before Sales Post, After Sales Post, etc., these Insertion Codes can be used to set examinations in transaction processes (e.g. Posting).

Break Condition:

The condition when a transaction shall be stopped are defined in the Break Condition.

Business Process "Post Sales Order":

Specific fields which are Mandatory Fields are controlled before posting a sales order. If the employee tries to post, an error message will open as soon as Mandatory Fields are not completely fulfilled.

Aptean Advanced Workflow Setup

Reference Type

No.: 36 (Sales Header)

Buffer Time on Function Call Server: 10 Seconds

Automatic Workflows: Yes



Workflows Template

Reference Type No: 36 (Sales Header)

Code: WF170

Description: Check Sales Order at Posting

Event Trigger (via "Choose Columns"): By Hook-in

Hook-in Code: Before Sales Post

Break Condition Code: WF170-C010

Condition

Table ID: 36 (Sales Head)

Code: WF170-C010

Description: Check before Posting

Type: Break

Condition Line 1

Active: Yes

Type: Field

Table ID: 36 (Sales Header)

Field ID: 43 (Employee Code)

Filter: ="

Check Condition Group: A

Condition Line 2

Active: Yes

Type: Field

Table ID: 36 (Sales Header)

Field ID: 5700 (Responsibility Center)



Filter: ="

Check Condition Group: B



Example 18

Article • 4/3/2023 • 3 min read

Type: Recurring Notification

Department: Sales (Customer Ledger Entries)

Learning Objectives

Multi Line Examination:

A Workflow can be executed on a Master Table (Header Table) and is able to accomplish examinations through sub tables (Line Table). This e.g. helps to find out, if a particular amount out of all lines has been reached. For this purpose, setups conforming a FlowField are established. The possible options available are: Sum, Count, Exist, Minimum, Maximum and Average.

In this case we will use the option "Maximum", in order to determine the latest date of a given record set.

Business Process "Notification on Inactive Customer":

The Sales Manager is to be notified, when a customer has made no turnover for more than half a year. Therefore it will be checked, if the customer has ledger entries at all. And if so, then it will be checked, if the latest of these ledger entries is older than half a year.

Aptean Advanced Workflow Setup

Reference Type

No.: 18 (Customer)

Editing Page ID: 21 (Customer Card)

Buffer Time on Function Call Server: 10 Seconds

Automatic Workflows: Yes

Keyword Definitions Line 1



Table ID: 18 (Customer)

Field ID: 1 (No.)

Tick all Use Fields

Keyword Definitions Line 2

Table ID: 18 (Customer)

Field ID: 2 (Name)

Tick all Use Fields

Table Join

Table ID: 18 (Customer)

Table ID to Join: 21 (Customer Ledger Entry)

Table Join Line 1

Field ID: 3 (Customer No.)

Value Type: Field

Value: 1 (No.)

To-do Templates

To-Do Template 1	Reference Type No: 18 (Customer) Code: WF180-TD010 DescriptionCustomer Inactive for
WHO	Employee Code: PS
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Manual Completion

Workflow Template

Reference Type No.: 18 (Customer)



Code: WF180

Description: Notification on Inactive Customer

Use Condition: WF180-C010

Additional: Yes

Condition

Table ID: 18 (Customer)

Code: WF180-C010

Description: Last Customer Ledger Entry older than 6 Months

Type: Workflow Template Use

All Condition Lines

Enabled: Yes

Type: Field

Table ID: 21 (Customer Ledger Entry)

Condition Line 1

Field ID: 1 (Entry No.)

Multi Line Check: Exist [eventually make column visible]

Filter: Yes

Condition Line 2

Field ID: 4 (Posting Date)

Wild Card Values

Wild Card No.: 1

Value Type: System Value

System Value: Workdate

Calculation Data Formula: -6M

Multi Line Check: Max



Filter: <%1

Workflow Line 1

Type: To-do

Code: WF180-TD010

Event Triggers [eventually make FastTab visible]

None [Uncheck all]



Example 19

Article • 4/3/2023 • 15 min read

Type: Sales Order Approval Process

Department: Sales

Learning Objectives

Archiving:

If the data source is deleted (e.g. the sales order), then the process (i.e. the workflow) is also archived.

Combine a Workflow Template with Synchronous Workflow Template:

Processes are always created on the basis of templates. In the system, there is a workflow template as well as synchronous workflow templates. The synchronous workflow templates are not directly there to map a process - rather they are there to support the user. Workflow templates, on which the process is created in the system, can be linked to synchronous workflow templates. Synchronous workflows can be used, for example, to prevent the posting of sales orders at a certain point in time or until a certain condition is met. This means that posting is prevented with a synchronous workflow until the workflow has been processed. This can be, for example, the issuing of an approval.

Visual View:

This is the graphical visualization of the entire process with its tasks broken down into a network/waterfall diagram. This illustration shows which tasks the process contains, in which order the tasks run in the process and which tasks are based on each other.

Business Process "Sales Order Approval":

An approval is required to post a sales order. The sales manager and the finance manager must approve each sales order. In addition, management becomes involved if the amount limit of 100,000 euros is exceeded. In this case, a two-stage approval process becomes a three-stage one. Corrections to the respective approval processes are always made by the advisor (the person who is responsible for the sales order).



Aptean Advanced Workflow Diagram

Aptean Advanced Workflow Setup

Reference Type

- No.: 36 (Sales Header)
- Buffer Time on Function Call Server: 1 minute
- Automatic Workflows: Yes
- Keyword Definitions Line 1
- Table ID: 36 (Sales Header)
- Field ID: 1 (Document Type)
- Tick all Use Fields
- Keyword Definitions Line 2
- Table ID: 36 (Sales Header)
- Field ID: 3 (No.)
- Tick all Use Fields
- Keyword Definitions Line 3
- Table ID: 36 (Sales Header)
- Field ID: 2 (Sell-to Customer No.)
- Tick all Use Fields
- Keyword Definitions Line 4
- Table ID: 36 (Sales Header)
- Field ID: 79 (Sell-to Customer Name)



Tick all Use Fields

To-Do Templates

To-Do Template 1 Reference Type No.: 36 (Sales Header) Code: WF190-TD010 Description: 1st Level Approval	
WHO	Team Code: SALE
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

Decision Option Set

Code: APPROVAL

Description: Approval

Decision Option Set Line 1

Value: Approve

Description: Approve

Decision Option Set Line 2

Value: Reject

Description: Reject

To-Do Template 2 Reference Type No.: 36 (Sales Header) Code: WF190-TD020 Description: 2nd Level Approval	
WHO	Team Code: CFO
WHY	Decision To-do Template Code: WF190- TD010 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD010 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL



To-Do Template 3 Reference Type No.: 36 (Sales Header) Code: WF190-TD030 Description: 3rd Level Approva	
WHO	Team Code: CEO
WHY	Decision To-do Template Code: WF190- TD020 Decision Value Filter: Approve Condition Code: WF190-C010
WHEN	Source Type: To-do Source Code: WF190-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

Condition

Table ID: 36 (Sales Header)

Code: WF190-C010

Description: Amount > 100000

Type: Activation

All Condition Lines

Enabled: Yes

Type: Field

Table ID: 36 (Sales Header)

Condition Line 1

Field ID: 60 (Amount)

Filter: >100000

To-Do Template 4 Reference Type No.: 36 (Sales Header) Code: WF190-TD040 Description: [Auto:] E-Mail No	
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190- TD020 Decision Value Filter: Approve Condition Code: WF1
WHEN	Source Type: To-do Source Code: WF190-TD020 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

Condition



Table ID: 36 (Sales Header)

Code: WF190-C020

Description: Amount <= 100000

Type: Activation

All Condition Lines

Enabled: Yes

Type: Field

Table ID: 36 (Sales Header)

Condition Line 1

Field ID: 60 (Amount)

Filter: <=100000

Table ID: 36 (Sales Header)

Code: WF190-C030

Description: Close To-do automatically

Type: Field Examination

All Condition Lines

Enabled: Yes

Type: Field

Table ID: 36 (Sales Header)

Condition Line 1

Field ID: 3 (No.)

Filter: <>''

To-Do Template 5 Reference Type No.: 36 (Sales Header) Code: WF190-TD050 Description: [Auto:] E-Mail No	
WHO	Team Code: WKFLADMIN



WHY	Decision To-do Template Code: WF190- TD030 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD030 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-Do Template 6 Reference Type No.: 36 (Sales Header) Code: WF190-TD060 Description: Correct Sales Ord	
WHO	Team Code: SP Employee Table Option: Salesperson/Purchaser Employee Table ID: 36 Employee Fie ID: 43
WHY	Decision To-do Template Code: WF190-TD010 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD010 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 7 Reference Type No.: 36 (Sales Header) Code: WF190-TD070 Description: 1st Level Approva	
WHO	Team Code: SALE
WHY	Decision To-do Template Code: WF190-TD010 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD060 Duration Date Calculation: 1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-Do Template 8 Reference Type No.: 36 (Sales Header) Code: WF190-TD080 Description: 2nd Level Approv	
WHO	Team Code: CFO
WHY	Decision To-do Template Code: WF190-TD070 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD070 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-Do Template 9 Reference Type No.: 36 (Sales Header) Code: WF190-TD090 Description: 3rd Level Approv	
WHO	Team Code: CEO



WHY	Decision To-do Template Code: WF190-TD080 Decision Value Filter: Approve Condition Code: WF190-C010
WHEN	Source Type: To-do Source Code: WF190-TD080 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-Do Template 10 Reference Type No.: 36 (Sales Header) Code: WF190-TD100 Description: [Auto:] E-Mail N	
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD080 Decision Value Filter: Approve Condition Code: WF
WHEN	Source Type: To-do Source Code: WF190-TD080 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-Do Template 11 Reference Type No.: 36 (Sales Header) Code: WF190-TD110 Description: [Auto:] E-Mail N	
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190- TD090 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD090 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-Do Template 12 Reference Type No.: 36 (Sales Header) Code: WF190-TD120 Description: Correct Sales Or	
WHO	Team Code: SP Employee Table Option: Salesperson/Purchaser Employee Table ID: 36 Employee Fi ID: 43
WHY	Decision To-do Template Code: WF190- TD020 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 13 Reference Type No.: 36 (Sales Header) Code: WF190-TD130 Description: 1st Level Approv	
WHO	Team Code: SALE



WHY	Decision To-do Template Code: WF190-TD020 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD120 Duration Date Calculation: 1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-Do Template 14 Reference Type No.: 36 (Sales Header) Code: WF190-TD140 Description: 2nd Level Approval	
WHO	Team Code: CFO
WHY	Decision To-do Template Code: WF190- TD130 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD130 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-Do Template 15 Reference Type No.: 36 (Sales Header) Code: WF190-TD150 Description: 3rd Level Approval	
WHO	Team Code: CEO
WHY	Decision To-do Template Code: WF190-TD140 Decision Value Filter: Approve Condition Code: WF190-C010
WHEN	Source Type: To-do Source Code: WF190-TD140 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-Do Template 16 Reference Type No.: 36 (Sales Header) Code: WF190-TD160 Description: [Auto:] E-Mail Notification	
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD140 Decision Value Filter: Approve Condition Code: WF190-C030
WHEN	Source Type: To-do Source Code: WF190-TD140 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-Do Template 17 Reference Type No.: 36 (Sales Header) Code: WF190-TD170 Description: [Auto:] E-Mail Notification	
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD150 Decision Value Filter: Approve



WHEN	Source Type: To-do Source Code: WF190-TD150 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-Do Template 18 Reference Type No.: 36 (Sales Header) Code: WF190-TD180 Description: Correct Sales On	
WHO	Team Code: SP Employee Table Option: Salesperson/Purchaser Employee Table ID: 36 Employee FI ID: 43
WHY	Decision To-do Template Code:WF190-TD030 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD030 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 19 Reference Type No.: 36 (Sales Header) Code: WF190-TD190 Description: 1st Level Approv	
WHO	Team Code: SALE
WHY	Decision To-do Template Code: WF190- TD030 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD180 Duration Date Calculation: 1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-Do Template 20 Reference Type No.: 36 (Sales Header) Code: WF190-TD200 Description: 2nd Level Approv	
WHO	Team Code: CFO
WHY	Decision To-do Template Code: WF190-TD190 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD190 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-Do Template 21 Reference Type No.: 36 (Sales Header) Code: WF190-TD210 Description: 3rd Level Approv	
WHO	Team Code: CEO
WHY	Decision To-do Template Code: WF190-TD200 Decision Value Filter: Approve Condition Code: WF190-C010



WHEN	Source Type: To-do Source Code: WF190-TD200 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-Do Template 22 Reference Type No.: 36 (Sales Header) Code: WF190-TD220 Description: [Auto:] E-Mail N	
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD200 Decision Value Filter: Approve Condition Code: WF
WHEN	Source Type: To-do Source Code: WF190-TD200 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-Do Template 23 Reference Type No.: 36 (Sales Header) Code: WF190-TD230 Description: [Auto:] E-Mail N	
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD210 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD210 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-do Group Template

[Customize This Page... → FastTabs: Show “Loop”]

Reference Type No.: 36 (Sales Header)

Code: WF190-TG100

Description: Level 3 Rejected (Inner)

To-do Group Line 1

Type: To-do

Code: WF190-TD180

To-do Group Line 2

Type: To-do



Code: WF190-TD190

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD180

Loop Group End To-Do: WF190-TD190

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG090

Description: Level 3 Rejected (Middle)

To-do Group Line 1

Type: To-do Group

Code: WF190-TG100

To-do Group Line 2

Type: To-do

Code: WF190-TD200

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD180

Loop Group End To-Do: WF190-TD200

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG080

Description: Level 3 Rejected (Outer)

To-do Group Line 1

Type: To-do Group



Code: WF190-TD090

To-do Group Line 2

Type: To-do

Code: WF190-TD210

To-do Group Line 3

Type: To-do

Code: WF190-TD220

To-do Group Line 4

Type: To-do

Code: WF190-TD230

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD180

Loop Group End To-Do: WF190-TD210

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG070

Description: Level 2 Rejected (Inner)

To-do Group Line 1

Type: To-do

Code: WF190-TD120

To-do Group Line 2

Type: To-do

Code: WF190-TD130

Loop Group Activate: Yes



Loop Group Start To-Do: WF190-TD120

Loop Group End To-Do: WF190-TD130

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG060

Description: Level 2 Rejected (Middle)

To-do Group Line 1

Type: To-do Group

Code: WF190-TG070

To-do Group Line 2

Type: To-do

Code: WF190-TD140

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD120

Loop Group End To-Do: WF190-TD140

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG050

Description: Level 2 Rejected (Outer)

To-do Group Line 1

Type: To-do Group

Code: WF190-TG060

To-do Group Line 2



Type: To-do

Code: WF190-TD150

To-do Group Line 3

Type: To-do

Code: WF190-TD160

To-do Group Line 4

Type: To-do

Code: WF190-TD170

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD120

Loop Group End To-Do: WF190-TD150

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG040

Description: Level 1 Rejected (Inner)

To-do Group Line 1

Type: To-do

Code: WF190-TD060

To-do Group Line 2

Type: To-do

Code: WF190-TD070

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD060

Loop Group End To-Do: WF190-TD070



Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG030

Description: Level 1 Rejected (Middle)

To-do Group Line 1

Type: To-do Group

Code: WF190-TG040

To-do Group Line 2

Type: To-do

Code: WF190-TD080

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD060

Loop Group End To-Do: WF190-TD080

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG020

Description: Level 1 Rejected (Outer)

To-do Group Line 1

Type: To-do Group

Code: WF190-TG030

To-do Group Line 2

Type: To-do

Code: WF190-TD090



To-do Group Line 3

Type: To-do

Code: WF190-TD100

To-do Group Line 4

Type: To-do

Code: WF190-TD110

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD060

Loop Group End To-Do: WF190-TD090

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG010

Description: No Level Rejected (All Levels Direct Approved)

To-do Group Line 1

Type: To-do

Code: WF190-TD010

To-do Group Line 2

Type: To-do

Code: WF190-TD020

To-do Group Line 3

Type: To-do

Code: WF190-TD030

To-do Group Line 4

Type: To-do



Code: WF190-TD040

To-do Group Line 5

Type: To-do

Code: WF190-TD050

Workflow Template

Reference Type No.: 36 (Sales Header)

Code: WF190

Description: Sales Order Approval Process

Reaction on Condition Discontinuation: Keep Active

Archive on Deleted Source: Yes

Auto. Archive (Identifier) When Closed: Yes

Editing Page ID: 42

Use Condition: WF190-C040

Additional: Yes

Condition

Table ID: 36 (Sales Header)

Code: WF190-C040

Description: Released Sales Order

Type: Workflow Template Use

All Condition Lines

Enabled: Yes

Type: Field

Table ID: 36 (Sales Header)

Condition Line 1



Field ID: 1 (Document Type)

Filter: Order

Condition Line 2

Field ID: 120 (Status)

Filter: Released

Workflow Line 1

Type: To-do Group

Code: WF190-TG010

Description: No Level Rejected (All Levels Direct Approved)

Workflow Line 2

Type: To-do Group

Code: WF190-TG020

Description: Level 1 Rejected (Outer)

Workflow Line 3

Type: To-do Group

Code: WF190-TG050

Description: Level 2 Rejected (Outer)

Workflow Line 4

Type: To-do Group

Code: WF190-TG080

Description: Level 3 Rejected (Outer)

Synchronous Workflow Template

Reference Type No: 36 (Sales Header)

Code: WF192



Description: Stop Sales Order Posting

Event Trigger: By Hook-in

Hook-in Code: Before Sales Post

Break Condition Code: WF192-C010

Use Condition: WF192-C020

Additional: Yes

Condition

[Choose Columns... → "Template Code", "Check Condition Group"]

Table ID: 36 (Sales Header)

Code: WF192-C010

Description: Stop Sales Order Posting

Type: Break

All Condition Lines

Enabled: Yes

Type: Workflow Template

Table ID: 36 (Sales Header)

Condition Line 1

Template Code: WF190

Filter: <>2

Table ID: 36 (Sales Header)

Code: WF192-C020

Description: Stop Sales Order Posting / Reopen

Type: Workflow Template Use

All Condition Lines

Enabled: Yes



Type: Field

Table ID: 36 (Sales Header)

Condition Line 1

Field ID: 1 (Document Type)

Filter: Order

Reference Type No: 36 (Sales Header)

Code: WF194

Description: Stop Sales Order Reopen

Event Trigger: By Hook-in

Hook-in Code: Bef. Sales Reopen

Break Condition Code: WF194-C010

Use Condition: WF192-C020

Additional: Yes

Condition

Table ID: 36 (Sales Header)

Code: WF194-C010

Description: Stop Sales Order Reopen

Type: Break

All Condition Lines

Enabled: Yes

Type: To-do Template

Table ID: 36 (Sales Header)

Condition Line 1

Check Condition Group: A



Template Code: WF190-TD060

Filter: 2

Condition Line 2

Check Condition Group: A

Template Code: WF190-TD070

Filter: <>0

Condition Line 3

Check Condition Group: B

Template Code: WF190-TD120

Filter: 2

Condition Line 4

Check Condition Group: B

Template Code: WF190-TD130

Filter: <>0

Condition Line 5

Check Condition Group: C

Template Code: WF190-TD180

Filter: 2

Condition Line 6

Check Condition Group: C

Template Code: WF190-TD190

Filter: <>0

Condition Line 7

Check Condition Group: D

Template Code: WF190-TD060



Filter: 0

Condition Line 8

Check Condition Group: D

Template Code: WF190-TD120

Filter: 0

Condition Line 9

Check Condition Group: D

Template Code: WF190-TD180

Filter: 0



Automation flow

Article • 4/3/2023 • 2 min read

Aptean Advanced Workflow is a powerful tool for automating business processes. It allows you to create flows that trigger actions, such as creating documents and assigning tasks, when certain criteria are met. With the **Exit Point Codeunit** feature, you can also create custom codeunits that execute specific tasks within the flow. Using Exit Point Codeunits, you can create custom actions such as automatically creating a warehouse receipt when a certain item is received, creating a vendor compliance document when a certificate is received in a mailbox, or automatically creating a pallet file (manifest) when a vendor sends a file via mail. Aptean Advanced Workflow can also be used to automate the claim processes. For example, when a customer sends an e-mail with damaged goods or information about a sales shipment, a flow can be created that automatically creates a sales return order. Once the sales return order is created, the Aptean Advanced Workflow can be triggered for an approval process and post the sales return order automatically once all approvals are completed.

! Note

If you want to use Power Platform and Business Central data in a Flow or an App, you must ensure that you have the necessary permissions, such as creating a connection to the Business Central environment. Keep in mind that Aptean Advanced Workflow does not currently have an API for any of its tables. Hence, you can develop an extension with an API page that can be connected to the Workflow to-do table or other Workflow tables.



Create an item based on an incoming mail attachment

Article • 4/3/2023 • 2 min read

Scenario:

- Received a new incoming mail.
- The condition prevails as the Subject contains Power Automate.

If the above condition is satisfied, the received attachment is saved in a folder.

Note

When you select the Connector BC (On-Premises), and the BC table is not found, use ODATA Webservice.

1. In the Company name field, select **My Company**.
2. In the **API category** field, select v2.0 from the drop-down list.
3. In the **Table name** field, select items from the drop-down list.
4. In the **Display Name** field, enter the Item Description as the Mail Subject.

To Test the Flow use own online environment:

5. On the action bar, click **Test** to check if the created Flow runs without errors.
6. On **Test Flow**, select **Manually** to send an email to your inbox. This will trigger the flow and allow you to test it.
7. Check if a new item has been created.
8. On the action bar, select **Turn on** if all the tests are successful.



Create a sales order based on an incoming mail attachment

Article • 4/3/2023 • 3 min read

Scenario:

- Received a new incoming mail.
- The condition prevails as the Subject contains Power Automate.

If the above condition is satisfied, the received attachment is saved in a folder.

Note

When you select the Connector BC (On-Premises), and the BC table is not found, use ODATA Webservice.

1. In the Company name field, select **My Company**
2. In the **API category** field, select v2.0 from the drop-down list.
3. In the **Table name** field, select sales order from the drop-down list.
4. In the **Customer Name** field, enter the desired number.
5. On the **Table name** field, select sales order lines from the drop-down list.
6. In the **Line Type** field, select Item.
7. In the **Quantity** field, select the desired quantity.

To Test the Flow, use your own online environment:

8. On the action bar, click **Test** to check if the created Flow runs without errors.
9. On **Test Flow**, select **Manually** to send an email to your inbox. This will trigger the flow and allow you to test it.
10. Check if a new sales order has been created.
11. On the action bar, select **Turn on** if all the tests are successful.



Automation with Aptean Advanced Workflow extension

Article • 4/3/2023 • 8 min read

Release and Post a Sales Order

The following Aptean Advanced Workflow includes one to-do template and two Exit Point Codeunits, which can be used to process a Sales Order fully automated. This process involves setting a Sales Order on Status Release and Posting the Sales Order (Shipment + Invoice) through Batch Jobs, without a User. This could be a part of the flow to create a sales order and process a sales order fully automated. For more information, see [Create a sales order based on an incoming mail attachment](#).

You can perform the following activities after creating a sales order:

1. In **Aptean Advanced Workflow Template Card** page, you can select the workflow condition.

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2. In **To-do Template Card** page, you can select *Field Examination*.

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3. You can set Field Examination Condition as *Only for Sales Orders*.

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- This allows you to have sales order lines only when the line type is items.
- Sales order line cannot be created without a quantity.

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When the Field Examination Condition is met, the **To-do** page is closed.

4. The setup on Status Change is the place to assign one or more Exit Point Codeunits. If more than one is assigned, they run in a line sequence.

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- When the status of the To-do is closed, you can release the Sales Order.
- When the status of Exit Point Codeunit is released, and status of To-do is closed, you can post the Sales Order through Batch Job.



Automation in BC with workflow

Article • 4/3/2023 • 2 min read

Aptean Advanced Workflow is an application within Business Central that helps streamline business processes such as purchase invoice control and master data setup. With this workflow, you can set up an Exit Point Codeunit on a To-do Template by Status Change. When the status of a To-do changes from any status except *Open* to *Closed*, the Exit Point Codeunit is triggered. This codeunit can perform various tasks such as releasing, posting, and creating. Standard Exit Point Codeunits are provided, however, you can also add your own custom-made Exit Point Codeunits and Codeunit Parameters for more specific tasks.

To load Parameters:

- In the **Exit Point Codeunit Parameters** page, on the Action bar, select **Actions > Functions > Load Parameters**, before using Exit Point Codeunits.

Note

The Exit Point Codeunit itself is considered an individual customization and is not supported, trained, or included as part of the official releases of Aptean Advanced Workflow.

