User Guide

Custom Workflow Approvals

Last updated: February 6, 2025

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1. About

The Custom Workflow Approvals application is designed to help clients wherein the standard features do not meet their needs. The standard options are limited to adding a condition on some data element of the document to trigger the workflow. The application extended this to allow for group-based approvals, multiple tiers of groups, chained approvers, and more.

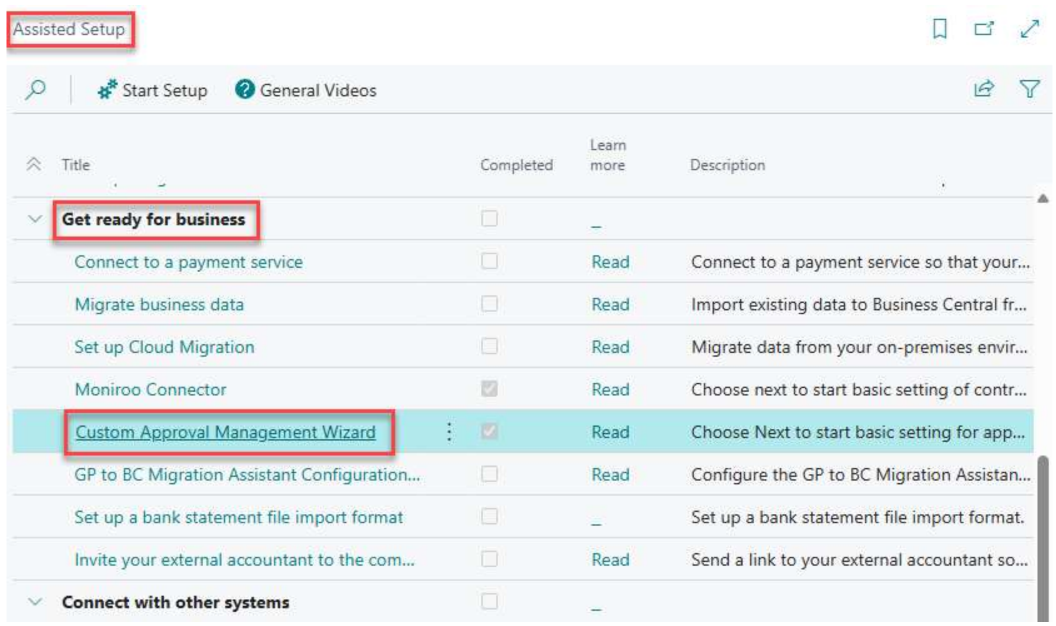
For more information, please go to https://www.websan.com/custom-workflow-approvals

2. BASIC SETUP

This section covers the basic system setup needed to use the Custom Workflow Approvals app. These steps should be completed prior to using the app.

To configure the application using a guided step-by-step wizard:

1. Use the magnifying glass tool to go to the Assisted Setup window.
2. In the Assisted Setup window, go to the section “Get ready for business”, and select the Custom Workflow Approvals Configuration Wizard.



3. Follow the instructions in the wizard. You will be ready to start using the application.

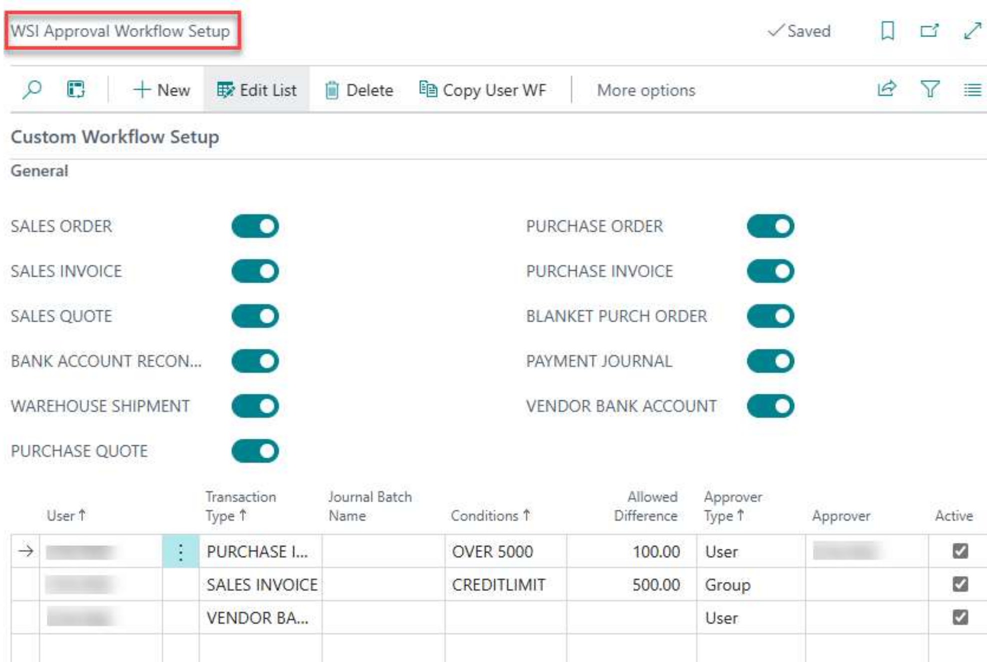
To manually configure the application, refer to the remaining topics of the Basic Setup section in this user guide.

General Settings

Use the magnifying glass tool to navigate to the WSI Approval Workflow Setup page. In the top half of the window, use the toggle fields to activate or deactivate the custom workflows supported by this application. When a custom workflow is activated, it will replace the corresponding base Dynamics 365 Business Central workflow. When deactivated, the base workflows will be used instead.

The Custom Workflow Approvals application supports custom workflows for the following documents/business processes:

- Sales Orders
- Sales Invoices
- Sales Quotes
- Bank Account Reconciliation
- Warehouse Shipment
- Purchase Quote
- Purchase Order
- Purchase Invoice
- Blanket Purchase Order
- Payment Journal
- Vendor Bank Account

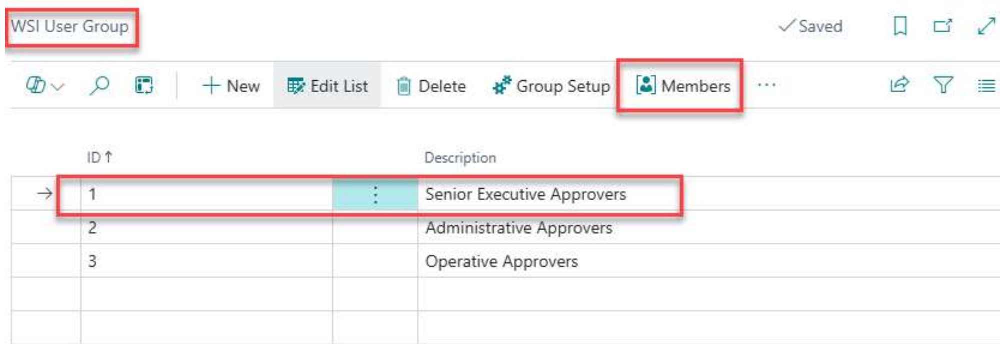


Approval Groups Setup

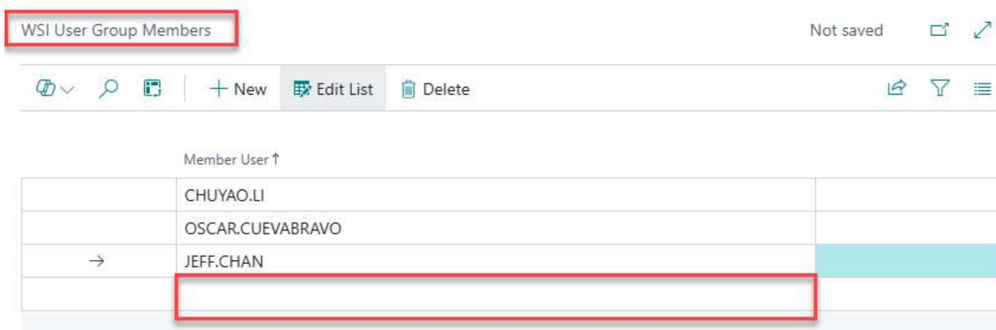
The Custom Workflow Approvals application expands the workflow approval options in base Microsoft Dynamics 365 Business Central to include group-based approvals, multiple tiers of approval groups, and chained approvers.

To setup approval groups:

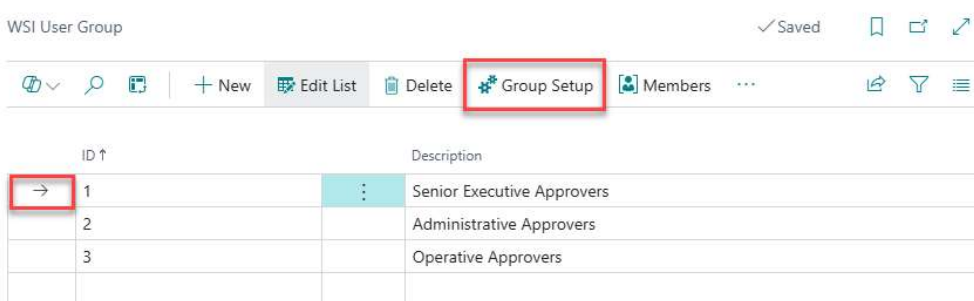
1. Use the magnifying glass tool to go to the WSI User Group page
2. In the window that appears, use the ID & Description columns to create a new user group. Add as many groups of approvers as needed.



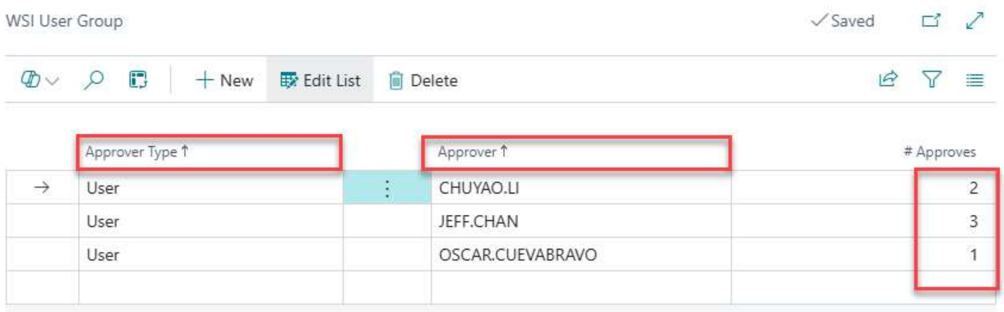
3. Once the necessary groups have been created, select a group from the list and click on Members. In the window that appears, use the Member User column to add new members to the approver group.



4. Once approver groups have been created and their members have been assigned, in the WSI User Group page, select your desired group and then click on User Setup.



5. In the window that appears, use the Approver Type column to choose the type of approver you want to select: User or Group. In the Approver column, add the approver members or groups of this group and the # Approves column to indicate the order in which each approver user or group will be asked to approve.

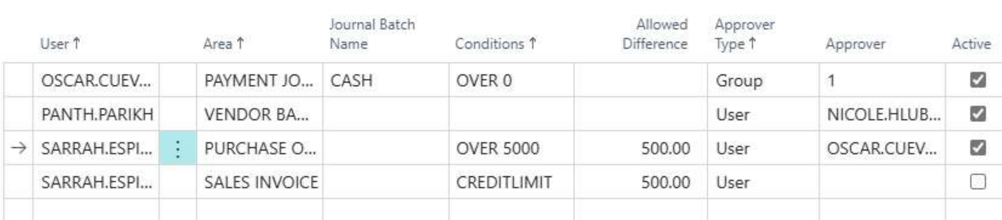


Approver Type ↑	Approver ↑	# Approves
User	CHUYAO.LI	2
User	JEFF.CHAN	3
User	OSCAR.CUEVABRAVO	1

Approval Workflow Creation

Custom Workflows can be crated once the desired custom workflows have been activated and approver groups have been configured. To create custom workflows:

1. Navigate to the WSI Approval Workflow Setup page.
2. In the bottom half of the screen, select a User if the workflow must be applicable for a single user. Leave the field empty if this needs to be a general workflow.
3. Select a custom workflow from the Area column.
4. If the workflow selected under the Area column is Payment Journal, use the Journal Batch Name column to select a Journal Batch for this workflow.
5. Use the Conditions column to set the condition that must be met for each of workflow. Note that each custom workflow has a different set of conditions available.
6. If the workflow area selected is for Purchase or Sales Documents, populate the Allow Difference field if necessary.
7. Use the Approver Type column to choose whether a group or user will approve the workflow.
8. Pick an approver under the Approver column.
9. Activate the custom workflow by ticking the box under the Active column.

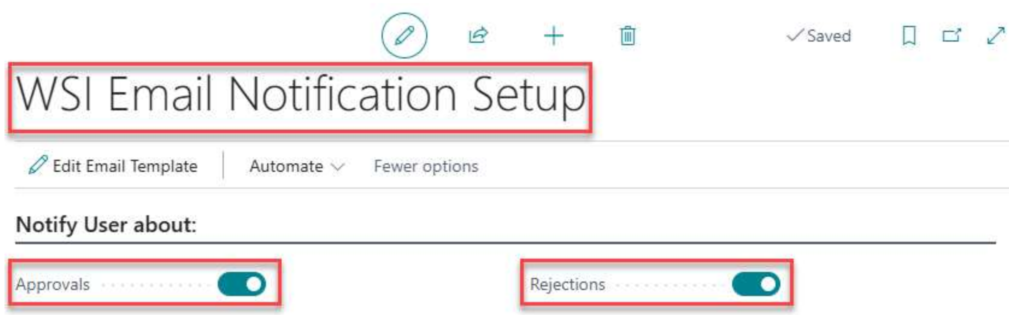


User ↑	Area ↑	Journal Batch Name	Conditions ↑	Allowed Difference	Approver Type ↑	Approver	Active
OSCAR.CUEV...	PAYMENT JO...	CASH	OVER 0		Group	1	☑
PANTH.PARIKH	VENDOR BA...				User	NICOLE.HLUB...	☑
SARRAH.ESPI...	PURCHASE O...		OVER 5000	500.00	User	OSCAR.CUEV...	☑
SARRAH.ESPI...	SALES INVOICE		CREDITLIMIT	500.00	User		☐

Approvals Notification Setup

The Custom Workflow Approvals application supports custom email notifications to allow more meaningful sharing of information. To activate custom email notifications:

1. Navigate to the WSI Email Notification Setup page.
2. Activate the type of notification emails you want the application to send (Approvals and/or Rejections) by activating their corresponding toggles.



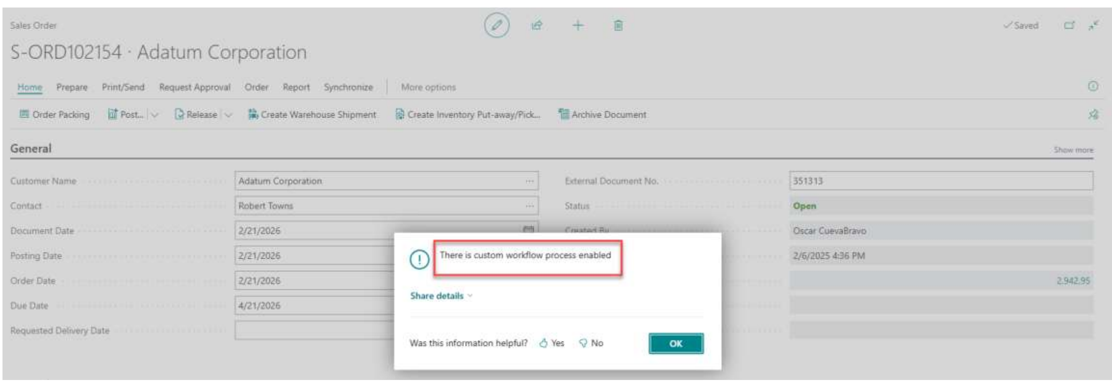
3. FUNCTIONALITY

The Custom Workflow Approvals application expands the workflow approval options in base Microsoft Dynamics 365 Business Central to include group-based approvals as well as other options.

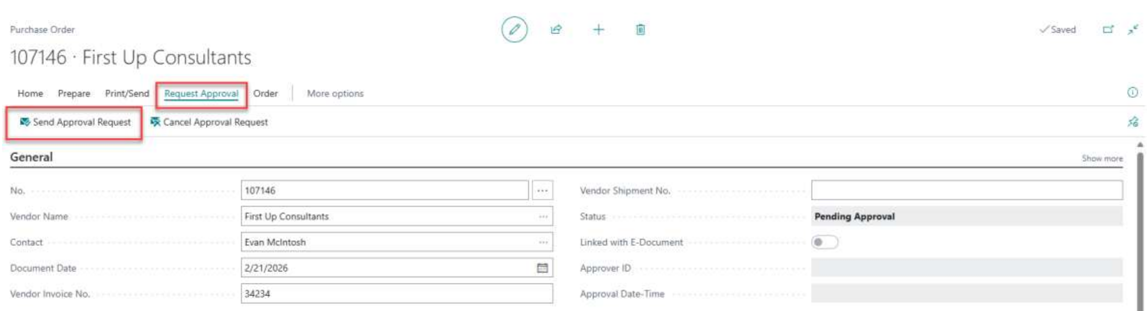
Submitting Approval Requests

Depending on the type of Workflow, the process to submit an approval will be different. The following examples illustrate how to submit approvals using the app.

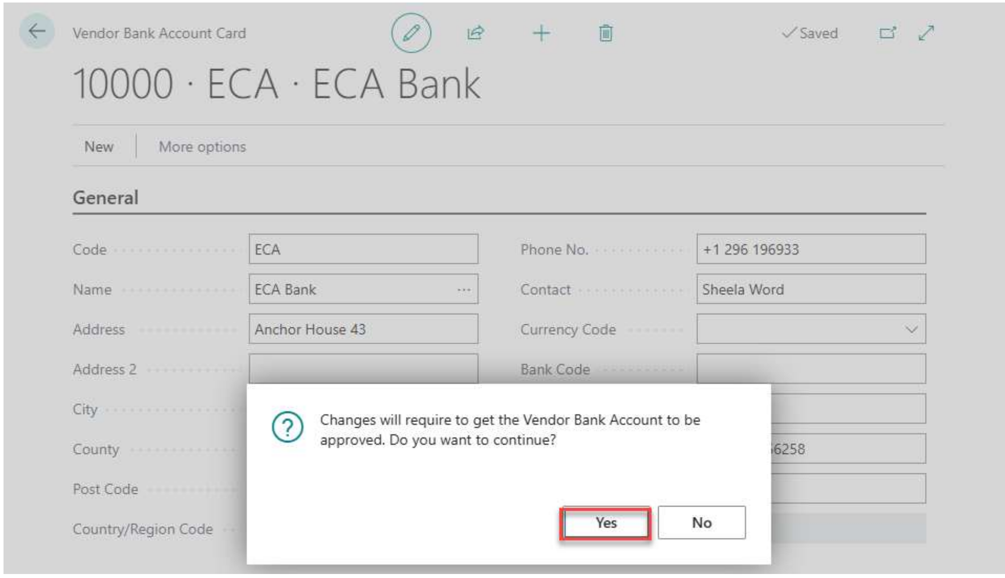
1. Sales Order – Credit limit is exceeded. To submit an approval, click Request Approval > Send Approval Request.



2. Purchase Order – Purchase Order Amount exceeds the custom workflow limit. After receiving the notification that a custom workflow process is enabled, click on Request Approval > Send Approval Request.



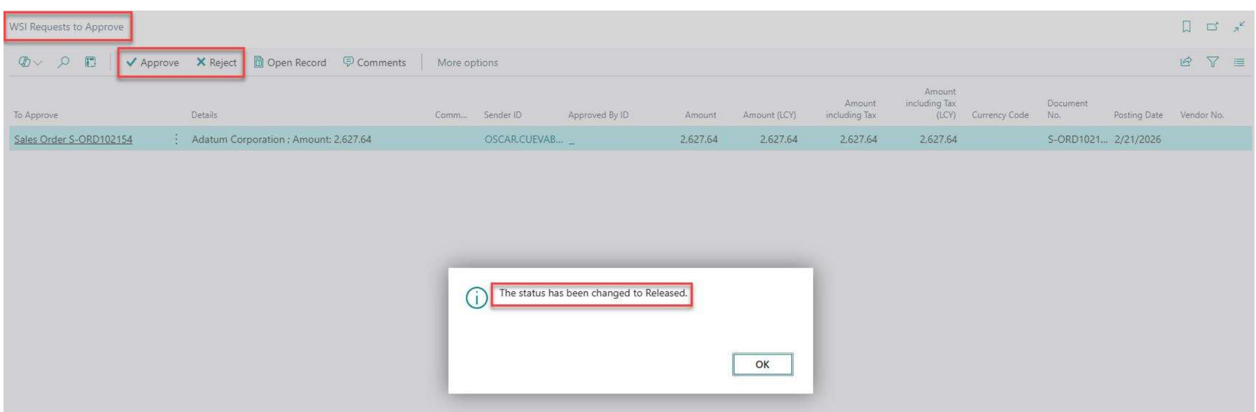
3. Vendor Bank Account – Vendor Bank Account is modified. User is prompted to indicate whether to submit the approval request.



Submitting Approvals/Rejections

To submit an approval or rejection:

1. navigate to the WSI Requests to Approve
2. Click on the Approve or Reject button.

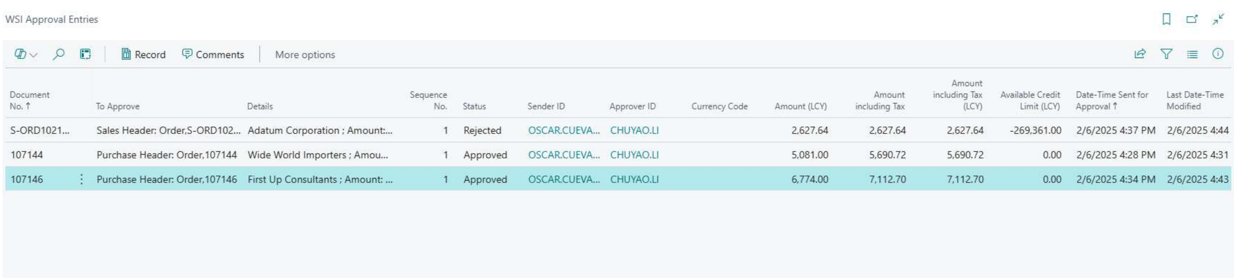


4. REPORTING

Users can view request details in the Custom Workflow Approvals application, including status, sender, approver, amounts, and more. Email notifications are sent to approvers when a new request is created and to submitters when a response is available.

Approval Entries

Navigate to the WSI Approval Entries page to review a list of all the approval entries that have been generated and approved/rejected by the application.


WSI Approval Entries

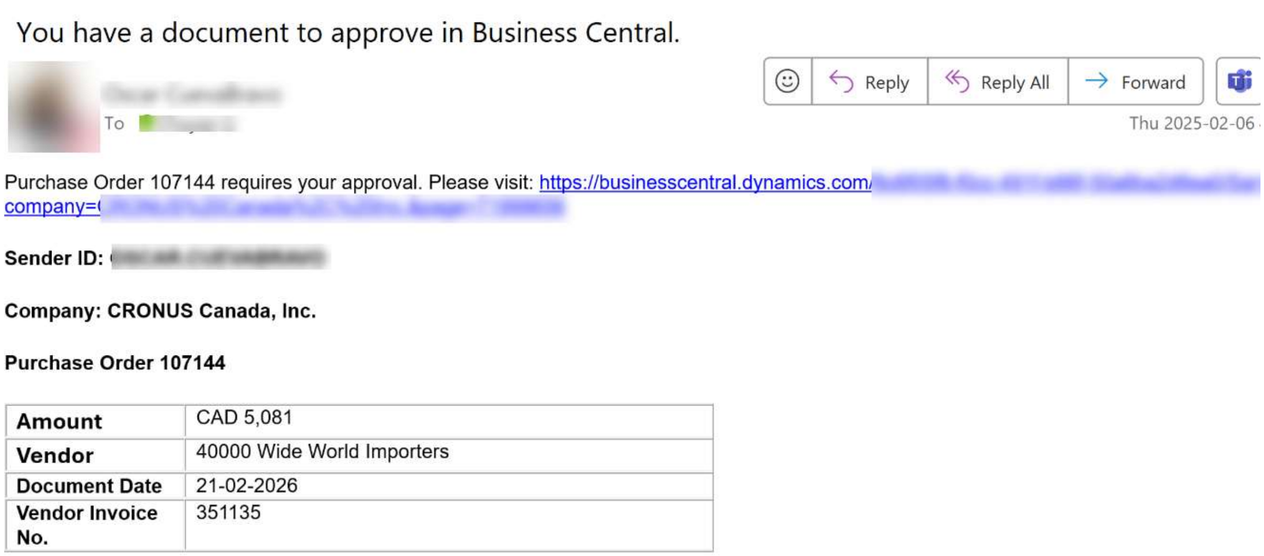
Record Comments More options

Document No. ↑	To Approve	Details	Sequence No.	Status	Sender ID	Approver ID	Currency Code	Amount (LCY)	Amount including Tax	Amount including Tax (LCY)	Available Credit Limit (LCY)	Date-Time Sent for Approval ↑	Last Date-Time Modified
S-ORD1021...	Sales Header: Order,S-ORD102...	Adatum Corporation ; Amount:...	1	Rejected	OSCAR.CUEVA...	CHUYAO.LI		2,627.64	2,627.64	2,627.64	-269,361.00	2/6/2025 4:37 PM	2/6/2025 4:44
107144	Purchase Header: Order,107144	Wide World Importers ; Amou...	1	Approved	OSCAR.CUEVA...	CHUYAO.LI		5,081.00	5,690.72	5,690.72	0.00	2/6/2025 4:28 PM	2/6/2025 4:31
107146	Purchase Header: Order,107146	First Up Consultants ; Amount: ...	1	Approved	OSCAR.CUEVA...	CHUYAO.LI		6,774.00	7,112.70	7,112.70	0.00	2/6/2025 4:34 PM	2/6/2025 4:43

Email Notifications

Email notifications are sent to the respective users when:

1. Request to approve is created


You have a document to approve in Business Central.

To

Reply Reply All Forward

Thu 2025-02-06

Purchase Order 107144 requires your approval. Please visit: https://businesscentral.dynamics.com/
company=

Sender ID:

Company: CRONUS Canada, Inc.

Purchase Order 107144

Amount	CAD 5,081
Vendor	40000 Wide World Importers
Document Date	21-02-2026
Vendor Invoice No.	351135

2. When a response (approval or rejection) is available

[redacted]
To: [redacted]

Reply Reply all Forward

Thu 2/6/2025 4:44 PM

Sales Order S-ORD102154 has been rejected. https://businesscentral.dynamics.com/[redacted]
company=[redacted]

Rejected By ID: [redacted]

Company: CRONUS Canada, Inc.

Sales Order S-ORD102154

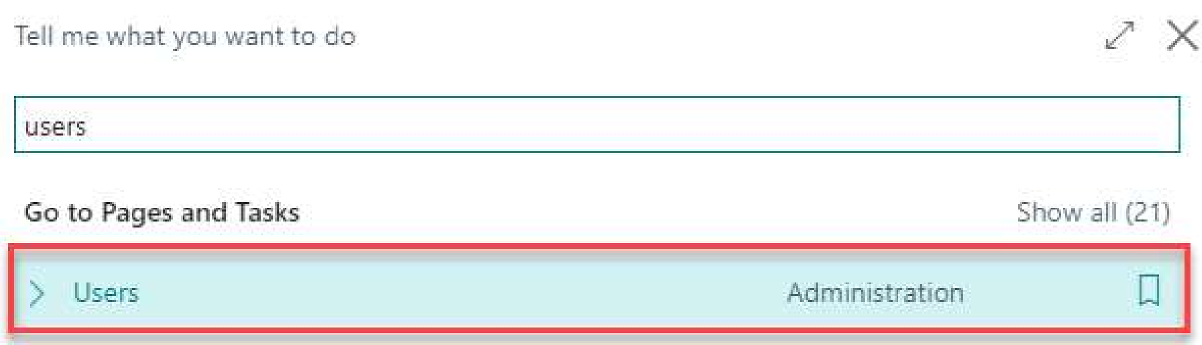
Amount	CAD 2,627.64
Customer	1000 Adatum Corporation
Document Date	21-02-2026
External Document No.	351313

5. Security

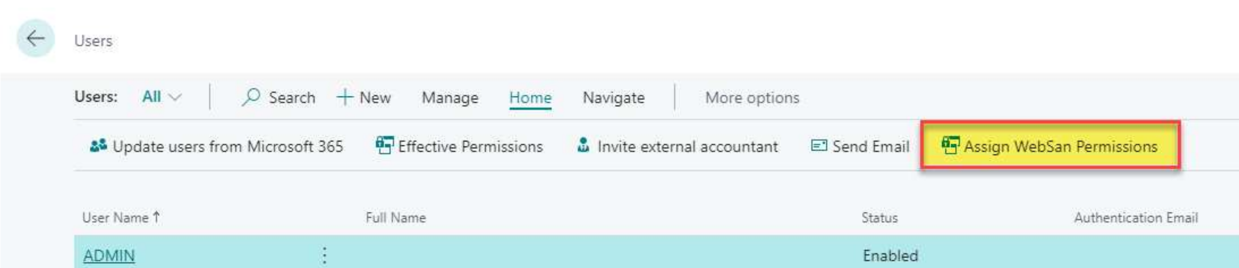
The Custom Workflow Approvals App, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the AutoPermission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.

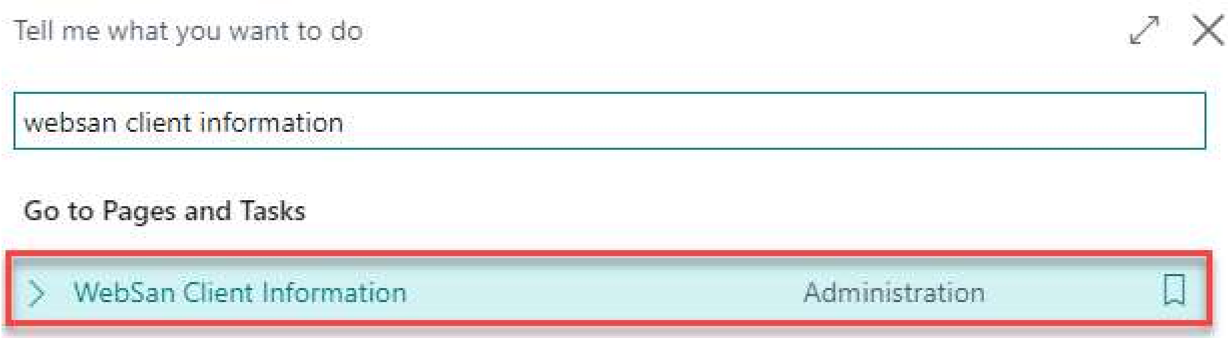


In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



6. Registration

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.



In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.