

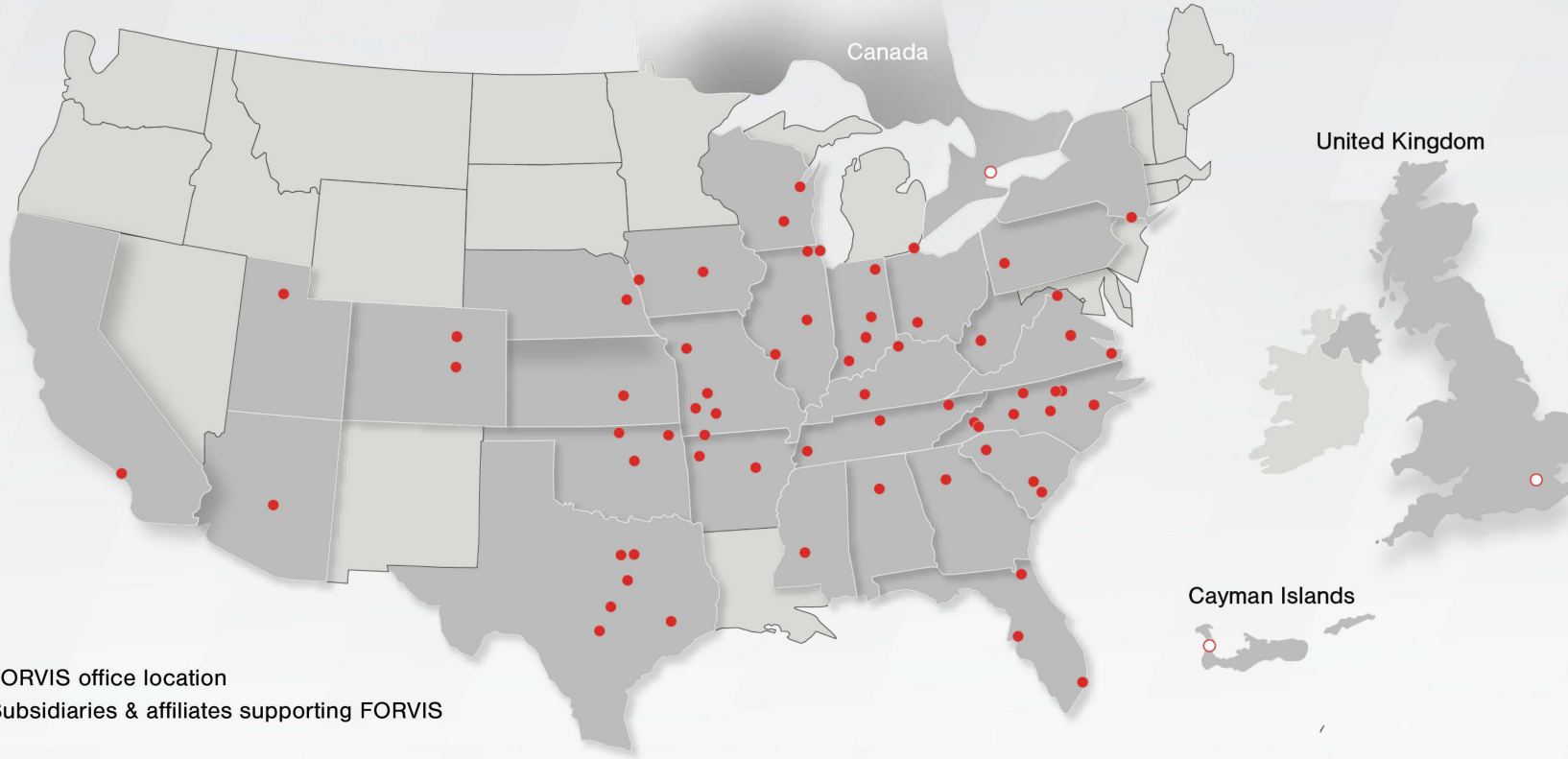
FORVIS[®]

Boosting Efficiency: Automating Workflows in Business Central

January 2024

Business Technology Solutions

Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Wealth Advisors, LLC
- FORVIS Global Advisory Canada ULC**
- FORVIS Global Advisory Ltd. UK**
- TALENT SHIFT, LLC

FORVIS

By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

Business Technology Solutions

FORVIS provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

In addition, our Insights & Automation services include business intelligence (BI) and robotic process automation (RPA) assessments, implementations, and training.

Microsoft Partner

2022/2023
INNERCIRCLE
for Microsoft Business Applications

We are a Microsoft Partner, value-added reseller (VAR), and recipient of the Microsoft Inner Circle Award.

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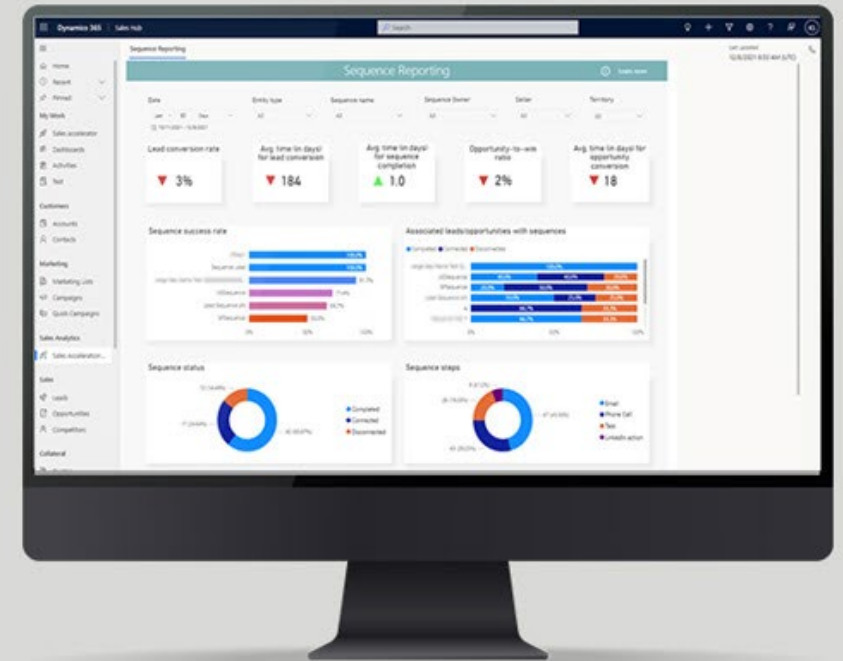
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Microsoft
Partner

Sage Partner

ORACLE
NETSUITE
Solution Provider

salesforce
PARTNER



From sales forecasting to financial reporting,
learn what CRM and ERP technologies can do.

Meet the Presenters



Kevin Liebergen

Lead Consultant
Business Technology Solutions



Suzie Moore

Managing Consultant
Business Technology Solutions

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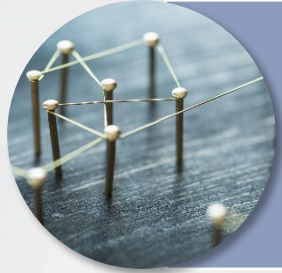
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Agenda



What Are Workflows?



Business Central



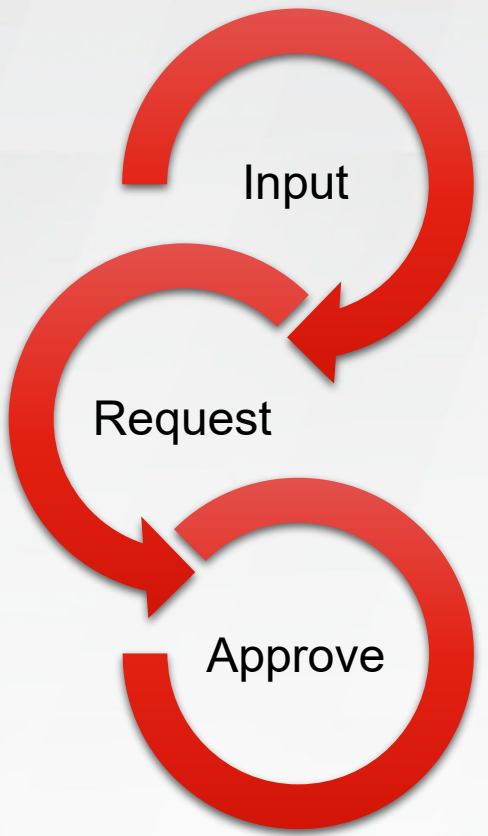
Power Automate

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What Are Workflows?

- Workflows
- Out-of-the-Box Business Central Workflows
- Power Automate Flows
 - Automated Flows
 - Instant Flows
- Approval workflows based on built-in workflow templates

What's in the box?



Sales Orders | Invoices | Credit Memos | Returns

Purchase Orders | Invoices | Credit Memos | Returns

Journals, Journals ... & MORE Journals

Customers & Vendors

There's Even More ...



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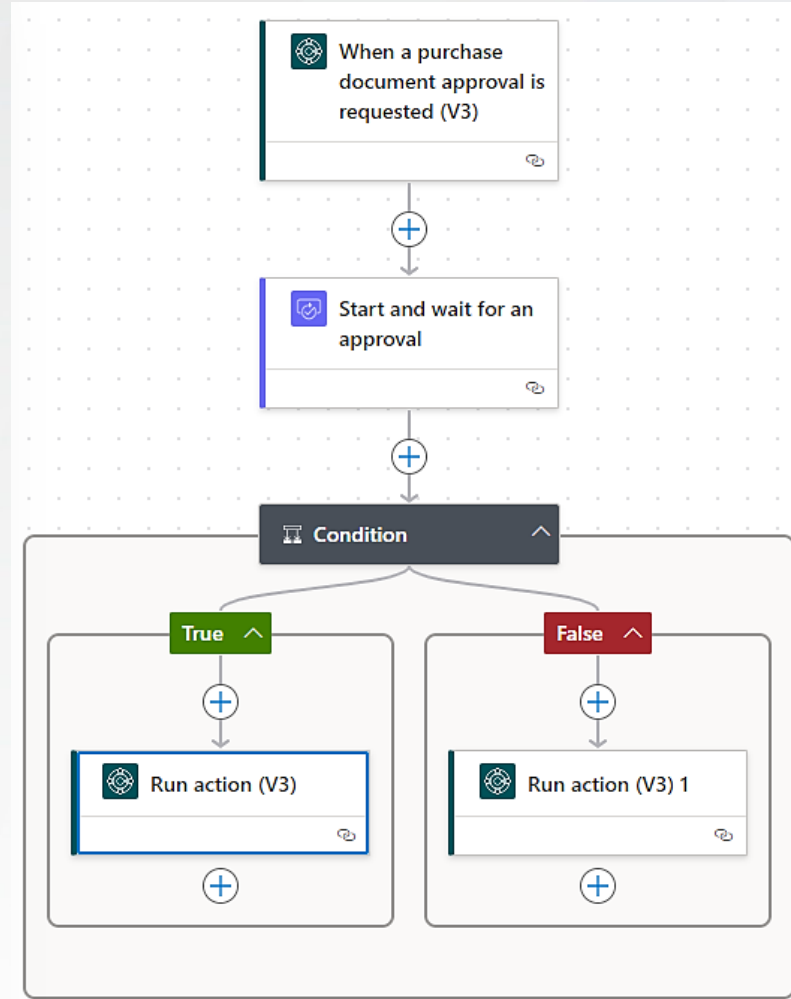


Power Automate

What's Power Automate?

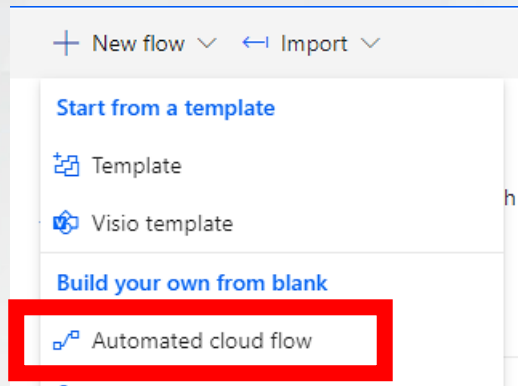
- Power Automate is a comprehensive, end-to-end cloud automation platform powered by low code & AI. With it you can
 - Automate processes based on triggers
 - Create flows that will run on click of a button
 - Connect to multiple systems to integrate data
 - Combine with AI tools to help develop & work with your data
 - Create triggers from Business Central, Dataverse, or multiple other applications!

Power Automate Approval Workflow Example

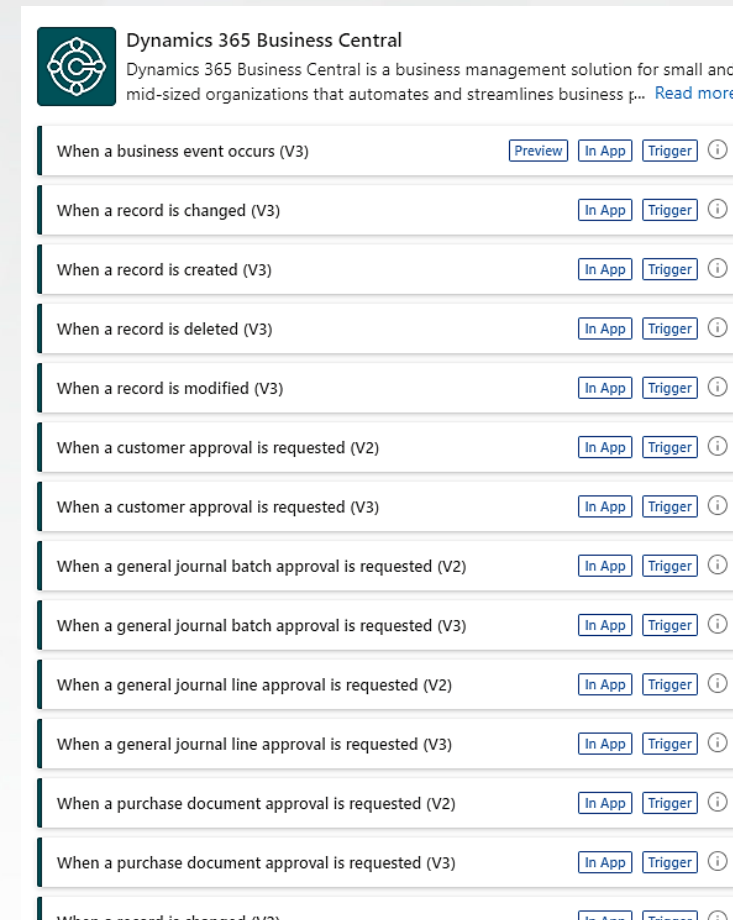


Power Automate Flow Trigger

1. Create a new “Automated cloud flow”



2. Select one of the available Business Central triggers



Power Automate Flow Trigger

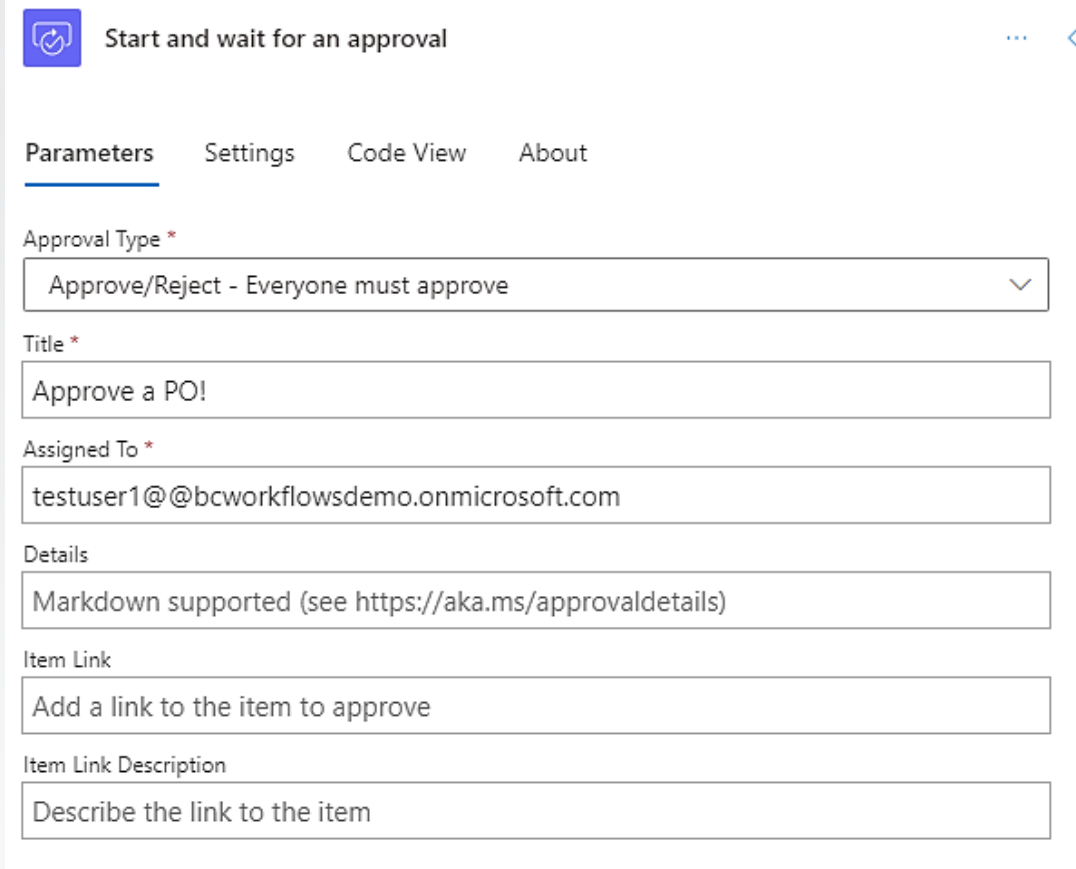
- “When a purchase document approval is requested (V3)”
- Select your Environment & Company
- Provides ability to filter on four Header conditions & four Line conditions
- Can filter by type to only process Purchase Orders or Purchase Invoices
- Can create multiple flows with different criteria
- Filters are not required

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The screenshot shows the configuration interface for the 'When a purchase document approval is requested (V3)' trigger in Power Automate. The page has a navigation bar with 'Parameters', 'Settings', 'Code View', and 'About'. The 'Parameters' section includes dropdown menus for 'Environment' (The Dynamics 365 Business Central environment) and 'Company' (The Dynamics 365 Business Central company). Below this is an 'Advanced parameters' section with a dropdown showing 'Showing 16 of 16' and links for 'Show all' and 'Clear all'. The main configuration area consists of four pairs of fields for line conditions. Each pair includes a dropdown to 'Select the field for the [line number] line condition' and a text input field to 'Enter a value for the [line number] line condition'. There are also 'Header First Condition' fields at the bottom.

Power Automate Approvals

- Approvals are included for everyone with Power Automate
- Start, Wait, & “Start and Wait”
- “Approval type” allows for waiting for all approvals or proceeding on the first approval
- Can customize approve/reject options



The screenshot shows the configuration interface for a Power Automate approval action. The title is "Start and wait for an approval". Below the title are four tabs: "Parameters" (selected), "Settings", "Code View", and "About". The "Parameters" tab contains several fields:

- Approval Type ***: A dropdown menu with the selected option "Approve/Reject - Everyone must approve".
- Title ***: A text box containing "Approve a PO!".
- Assigned To ***: A text box containing "testuser1@@bcworkflowsdemo.onmicrosoft.com".
- Details**: A text box containing "Markdown supported (see <https://aka.ms/approvaldetails>)".
- Item Link**: A text box containing "Add a link to the item to approve".
- Item Link Description**: A text box containing "Describe the link to the item".

Power Automate Approve/Reject Back to Business Central

- Check the Outcome for the Approve or Reject status
- Call Business Central API based on the response(s)

The image displays a Power Automate workflow configuration. On the left, the 'Condition' step is configured with the expression: `AND (Outcome does not contain Reject)`. The 'True' branch leads to a 'Run action (V3)' step, and the 'False' branch leads to another 'Run action (V3)' step. The 'Run action (V3)' configuration is shown on the right, with the following parameters:

- Environment: PRODUCTION
- Company: CRONUS USA, Inc.
- API Category: workflowEndpoints
- Action Name: WorkflowActionResponse_Approve
- Advanced parameters: Showing 1 of 1
- WorkflowStepInstanceId: body/W...

Connected to admin@bcworkflowsdemo.onmicrosoft.com. [Change connection](#)

Power Automate Approvals Visibility

Power Automate

Search

Home

Approvals

My flows

Create

Templates

Connectors

Approvals

Received Sent History

Request	Approve	Received	Details	Requested by
Approve a PO!	✓ ✕ ⋮	Apr 12, 08:43 AM (4 h ago)	Please approve th PO!	BC Admin

Microsoft Teams

Search

Activity

Chat

Teams

Calendar

Calls

Files

Approvals

Approvals

Received Sent

+ New approval

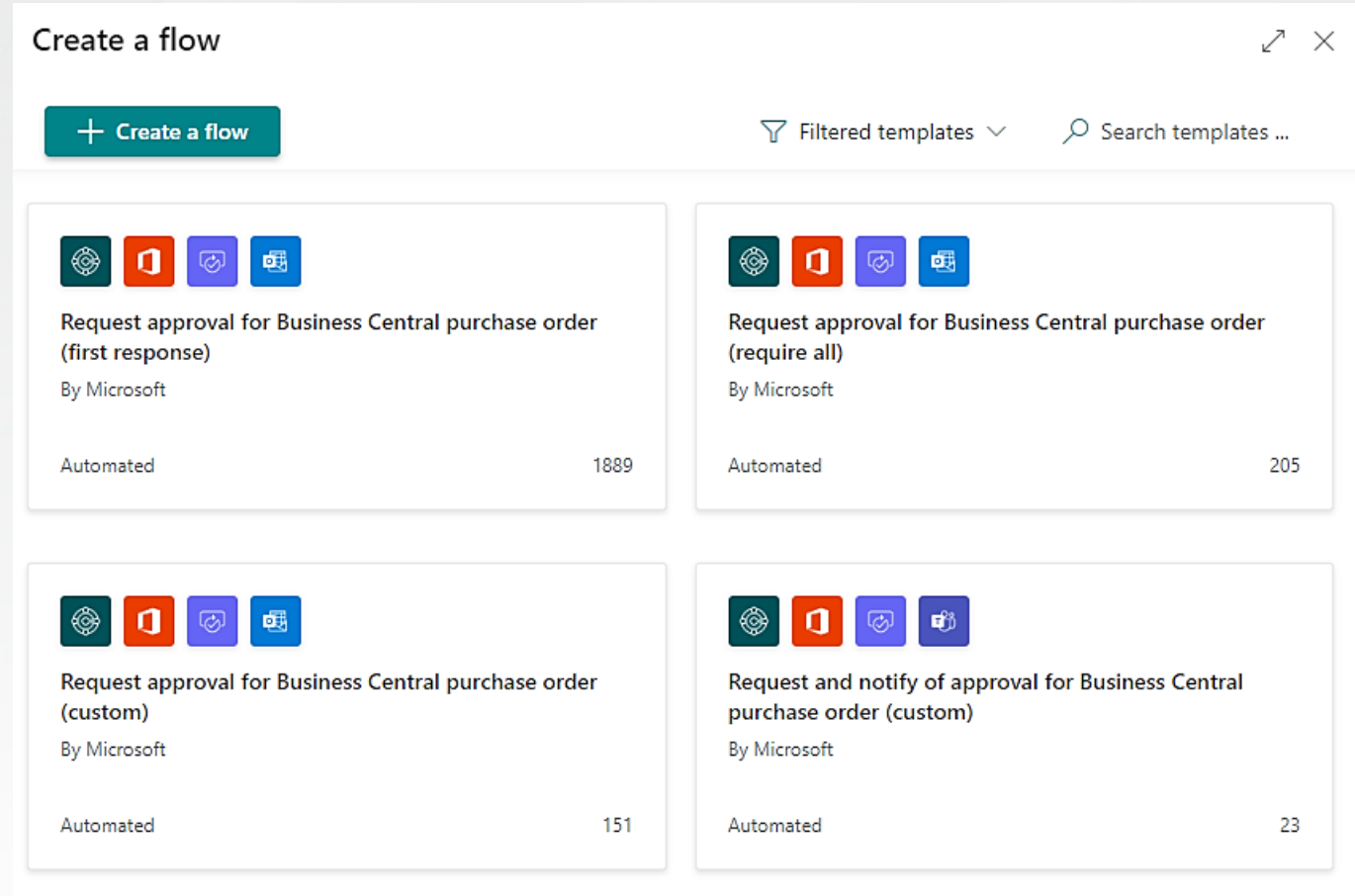
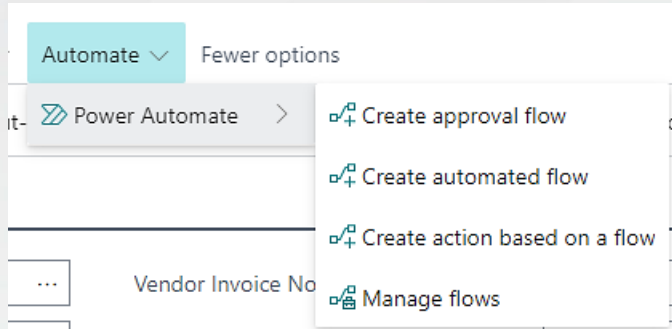
Filter FORVIS (default)

Priority	Request title	Status	Source	Created	Sent by	Sent to
	Approve a PO!	Requested		4/12/2023, 8:43:34 AM	BA BC Admin	BU BC User

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Power Automate Templates in Business Central

You can also create these in Business Central based on various templates!





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Things to Know


- Approvals have a 28-day limit for the wait & Flows have a 30-day limit before they time out
- If the flow fails, the order gets left in the “Pending Approval” state
- Can be difficult to know who has & has not approved yet
- Lack of visibility to Approvals created by other people
- Approvals are done outside of Business Central in Power Automate
- Currently, no way to mass approve requests

Pros & Cons

- Out-of-the-Box
 - Better visibility
 - Limited configurability
 - All work done in the same system
 - Business Central licensing required for all users involved in the process
- Power Automate
 - Lacking some visibility
 - More configurable
 - Multiple systems used
 - Business Central licensing **not** required for people who just need to approve/reject

More With Power Automate

Many options available for Power Automate triggers!

 **Dynamics 365 Business Central**
Dynamics 365 Business Central is a business management solution for small and mid-sized organizations that automates and streamlines business p... [Read more](#)

When a business event occurs (V3)	Preview In App Trigger i
When a record is changed (V3)	In App Trigger i
When a record is created (V3)	In App Trigger i
When a record is deleted (V3)	In App Trigger i
When a record is modified (V3)	In App Trigger i
When a customer approval is requested (V2)	In App Trigger i
When a customer approval is requested (V3)	In App Trigger i
When a general journal batch approval is requested (V2)	In App Trigger i
When a general journal batch approval is requested (V3)	In App Trigger i
When a general journal line approval is requested (V2)	In App Trigger i
When a general journal line approval is requested (V3)	In App Trigger i
When a purchase document approval is requested (V2)	In App Trigger i
When a purchase document approval is requested (V3)	In App Trigger i
When a record is changed (V2)	In App Trigger i
When a record is created (V2)	In App Trigger i
When a record is deleted (V2)	In App Trigger i
When a record is modified (V2)	In App Trigger i
When a sales document approval is requested (V2)	In App Trigger i
When a sales document approval is requested (V3)	In App Trigger i
When a vendor approval is requested (V2)	In App Trigger i
When a vendor approval is requested (V3)	In App Trigger i
When an item approval is requested (V2)	In App Trigger i
When an item approval is requested (V3)	In App Trigger i

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A background image showing a group of business professionals in a meeting. A woman in a white shirt is looking at a document, while a man in a suit looks on. The scene is brightly lit, suggesting an office environment.

For more information on the features reviewed in today's webinar, please visit:

- <https://learn.microsoft.com/en-us/dynamics365/business-central/across-set-up-workflows>
- <https://learn.microsoft.com/en-us/dynamics365/business-central/across-how-use-financials-data-source-flow>

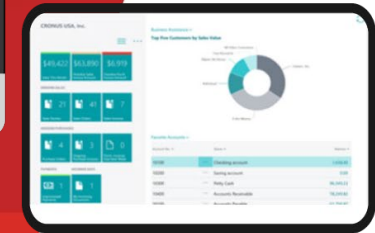
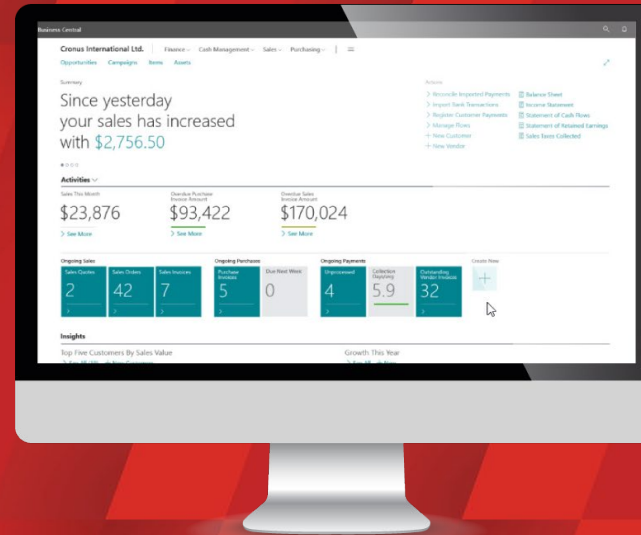
For more information about Implementing Business Central, please:

- Visit our website at www.forvis.com/services/microsoft-dynamics-365-business-central
- Or email us
 - kevin.liebergen@forvis.com
 - suzie.moore@forvis.com

Q&A

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Thank you!



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Assurance / Tax / Consulting