

EBT Custom Approval Workflows

Guide

by

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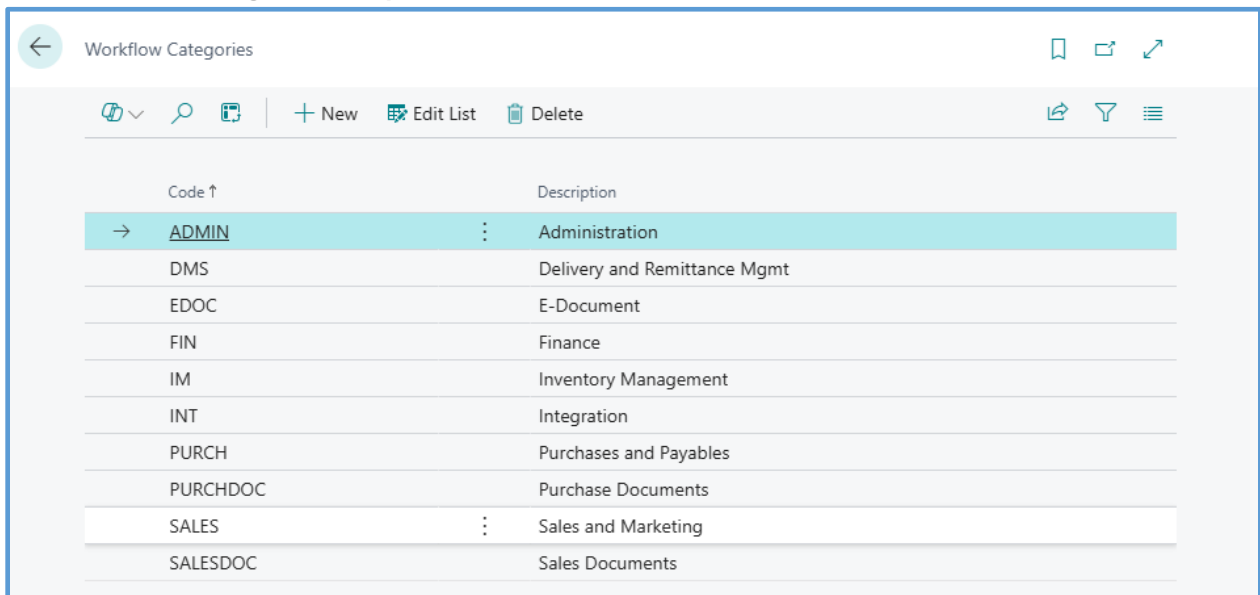
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EBT Customised Approval Workflows Extension for Business Central enables tailored routing and authorisation processes for documents like transfer orders, production orders, item entries, etc. These workflows ensure compliance with internal policies, enhance control, and improve efficiency by allowing organisations to define approval hierarchies and conditions specific to their business needs.

Prerequisites for Approval Workflow

For the Custom Workflow to function correctly, the following setups are required to be done:

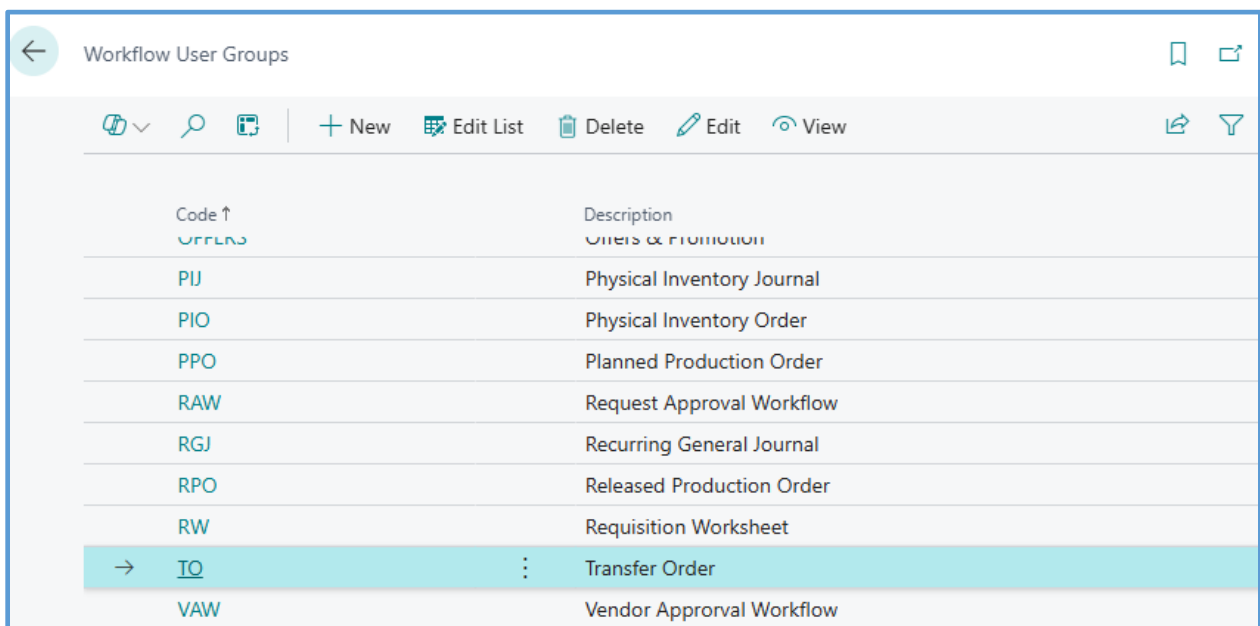
1. Workflow Categories Setup



Code ↑	Description
→ ADMIN	Administration
DMS	Delivery and Remittance Mgmt
EDOC	E-Document
FIN	Finance
IM	Inventory Management
INT	Integration
PURCH	Purchases and Payables
PURCHDOC	Purchase Documents
SALES	Sales and Marketing
SALESDOC	Sales Documents

2. Workflow user group

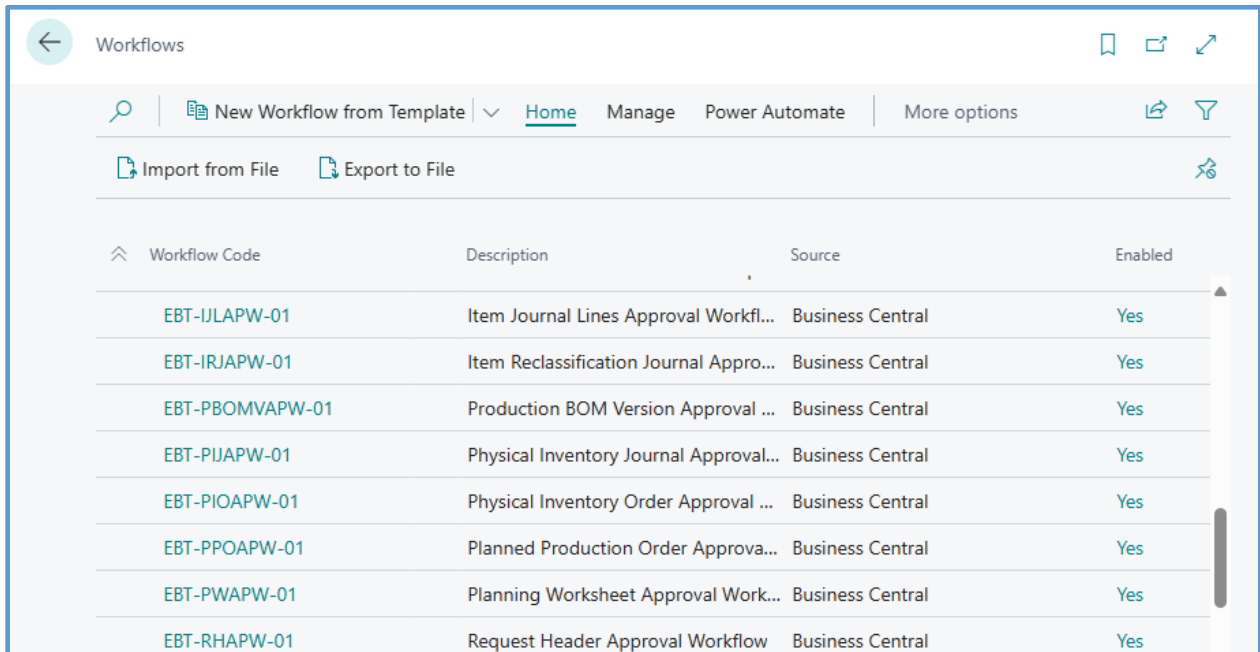
The workflow user group needs to be configured for each of the custom workflows



Code ↑	Description
UPFLNS	Offers & Promotion
PIJ	Physical Inventory Journal
PIO	Physical Inventory Order
PPO	Planned Production Order
RAW	Request Approval Workflow
RGJ	Recurring General Journal
RPO	Released Production Order
RW	Requisition Worksheet
→ IQ	Transfer Order
VAW	Vendor Approval Workflow

3. Workflows

Workflows need to be configured for each of the custom approval processes

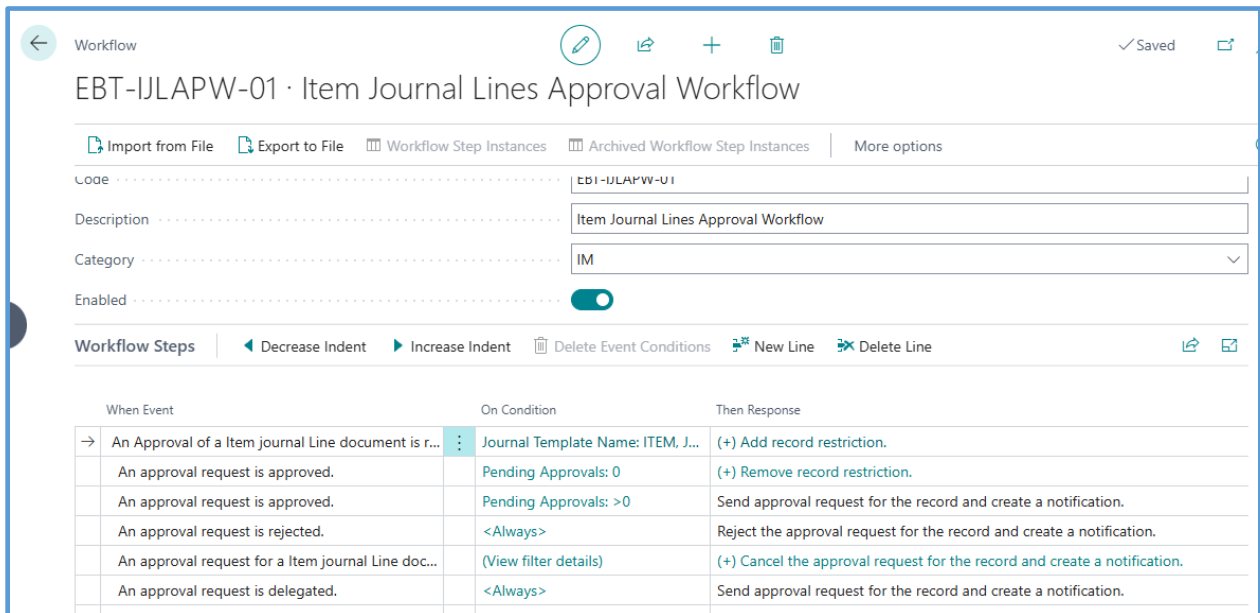


Workflows

Search | New Workflow from Template | Home | Manage | Power Automate | More options

Import from File | Export to File

Workflow Code	Description	Source	Enabled
EBT-IJLAPW-01	Item Journal Lines Approval Workfl...	Business Central	Yes
EBT-IRJAPW-01	Item Reclassification Journal Appro...	Business Central	Yes
EBT-PBOMVAPW-01	Production BOM Version Approval ...	Business Central	Yes
EBT-PIJAPW-01	Physical Inventory Journal Approval...	Business Central	Yes
EBT-PIOAPW-01	Physical Inventory Order Approval ...	Business Central	Yes
EBT-PPOAPW-01	Planned Production Order Approva...	Business Central	Yes
EBT-PWAPW-01	Planning Worksheet Approval Work...	Business Central	Yes
EBT-RHAPW-01	Request Header Approval Workflow	Business Central	Yes



Workflow

EBT-IJLAPW-01 · Item Journal Lines Approval Workflow

Import from File | Export to File | Workflow Step Instances | Archived Workflow Step Instances | More options

Code: EBT-IJLAPW-01

Description: Item Journal Lines Approval Workflow

Category: IM

Enabled: ☒

Workflow Steps | Decrease Indent | Increase Indent | Delete Event Conditions | New Line | Delete Line

When Event	On Condition	Then Response
→ An Approval of a Item journal Line document is r...	Journal Template Name: ITEM, J...	(+) Add record restriction.
An approval request is approved.	Pending Approvals: 0	(+) Remove record restriction.
An approval request is approved.	Pending Approvals: >0	Send approval request for the record and create a notification.
An approval request is rejected.	<Always>	Reject the approval request for the record and create a notification.
An approval request for a Item journal Line doc...	(View filter details)	(+) Cancel the approval request for the record and create a notification.
An approval request is delegated.	<Always>	Send approval request for the record and create a notification.

Workflow Responses - An Approval of a Item journal Line document is requested.

Options for the Selected Response

Show Confirmation Message ☒

Due Date Formula

Delegate After Never

Approver Type Workflow User Group

Workflow User Group Code IJ

[Open Approval User Setup](#)

OK Cancel

Workflow User Group - TO · Transfer Order

Manage Page

Code TO

Description Transfer Order

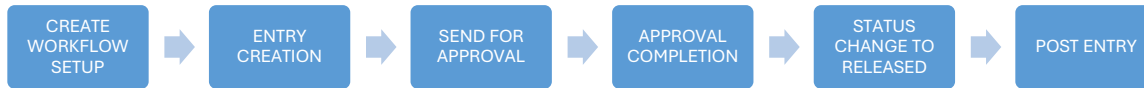
Workflow User Group Members

New Line Delete Line

	User Name ↑		Sequence No.
→	DEVELOPER1	⋮	1
	DEVELOPER3		2

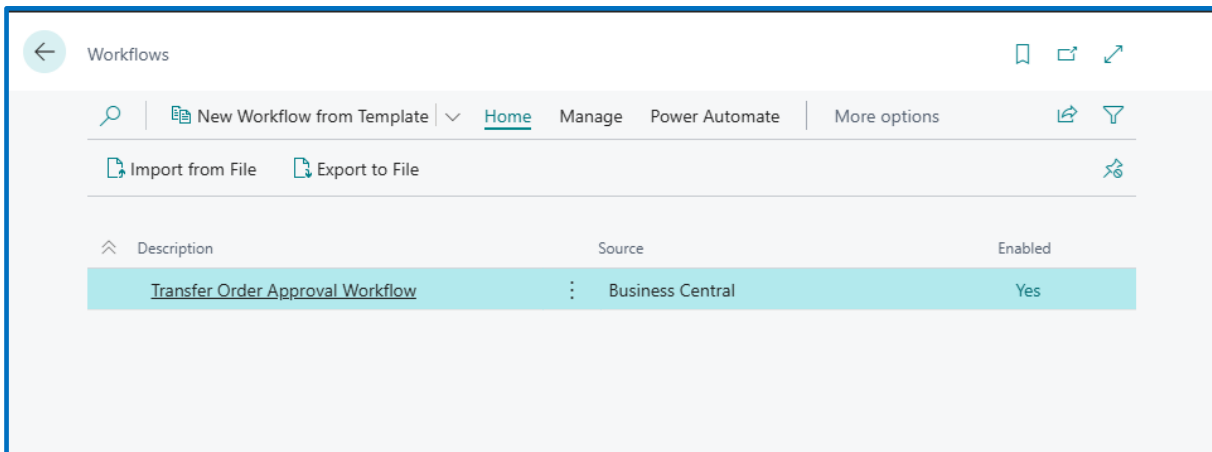
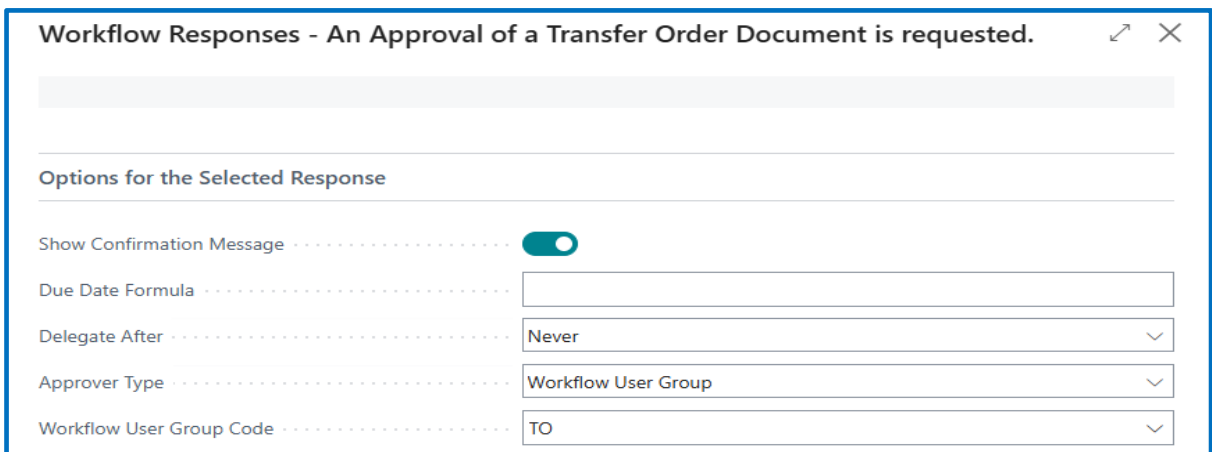
Process Flow

There are some standard processes which do not have a workflow, and for these processes, the workflow needs to be customised. Below are some of those processes.



1. Test Case1: TRANSFER ORDER

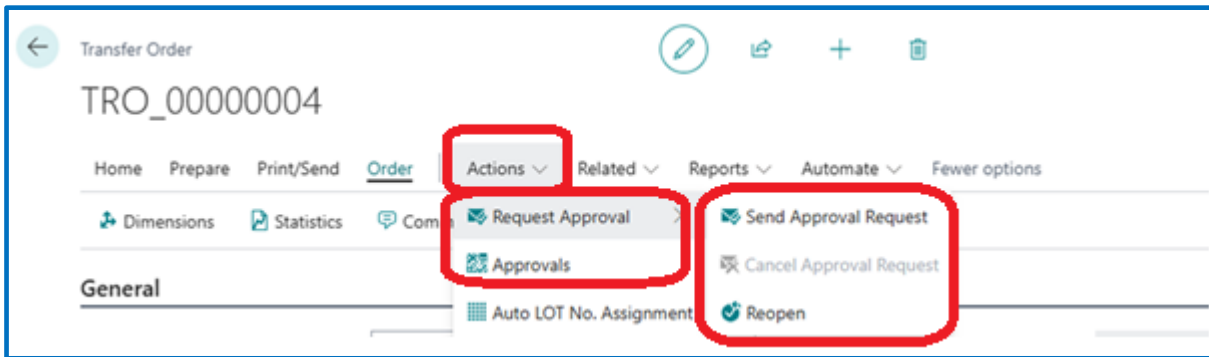
The workflow is created for the Transfer orders based on the various events for the entire approval process

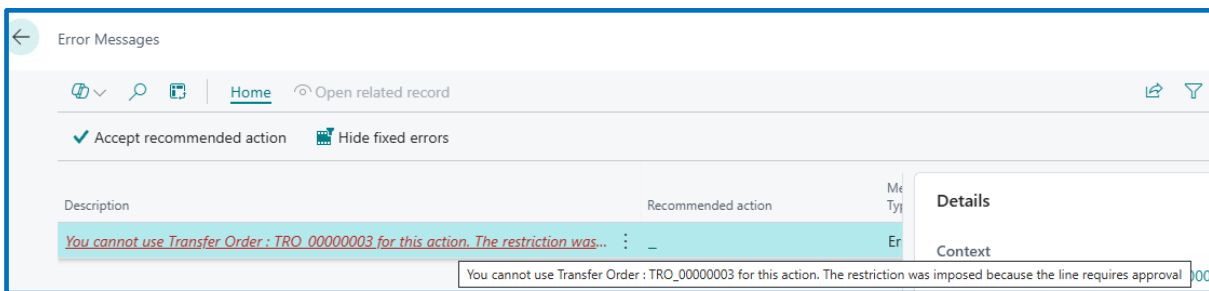
The screenshot shows the 'Workflow Responses - An Approval of a Transfer Order Document is requested.' configuration window. It includes a section for 'Options for the Selected Response' with the following settings:

- Show Confirmation Message: ☒
- Due Date Formula:
- Delegate After:
- Approver Type:
- Workflow User Group Code:

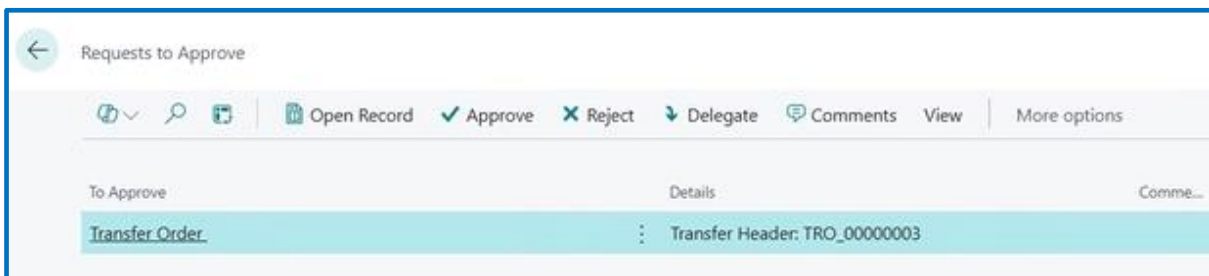
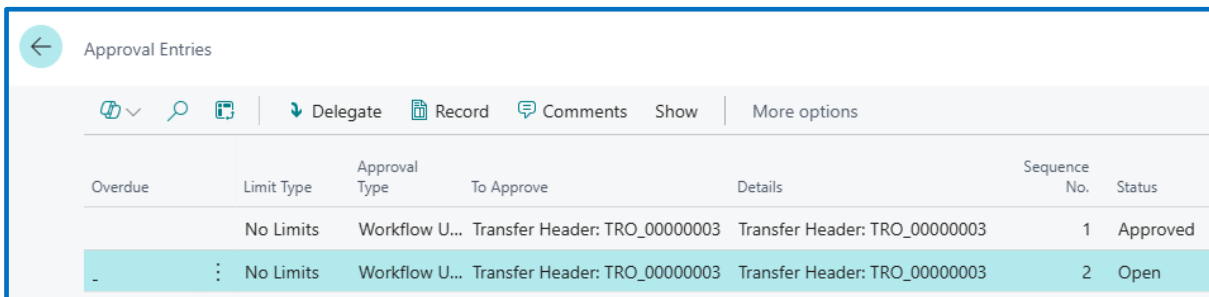
The Action button has the Request for Approval Tab and the Approval flow. The Send Approval Request triggers the request whereas the Cancel Approval Request is for cancelling the Request.



When the TO is posted without approval it gives the below error



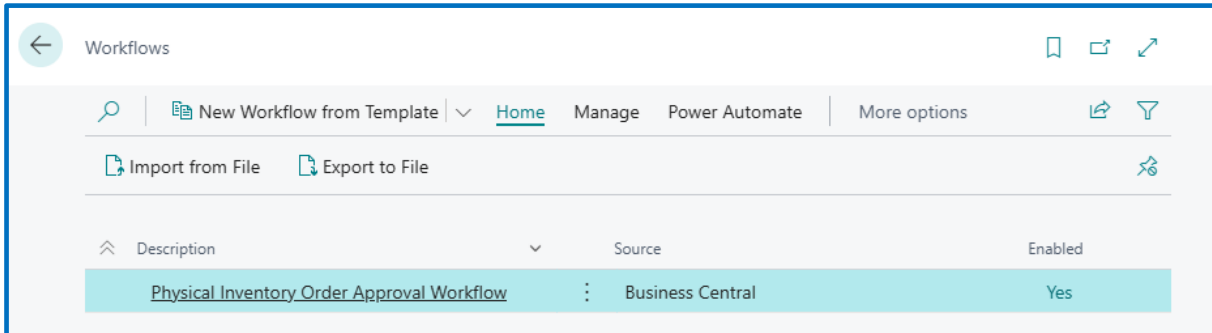
In the Approval Workflow / Request to approve the line



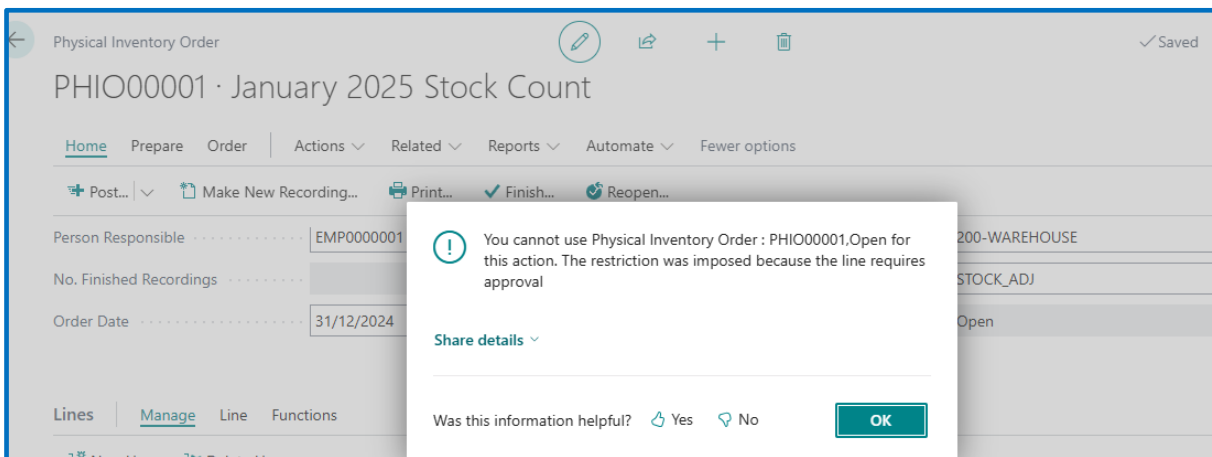
Once the Approver approves the status of it changes from “Pending for Approval” to “Released” in the Transfer Order, the Transfer Order will be allowed to post the same after the status change.

2. Test Case 2: PHYSICAL INVENTORY ORDER

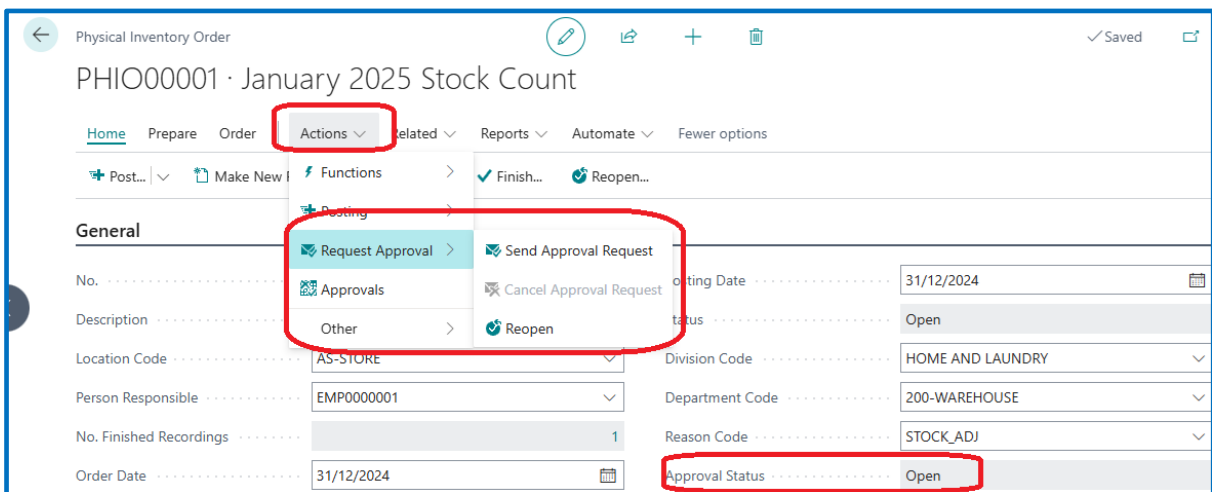
The physical inventory order workflow is to be setup providing all the necessary parameters.



After the recordings are completed when the same is tried to be posted then error comes informing that approval is required.

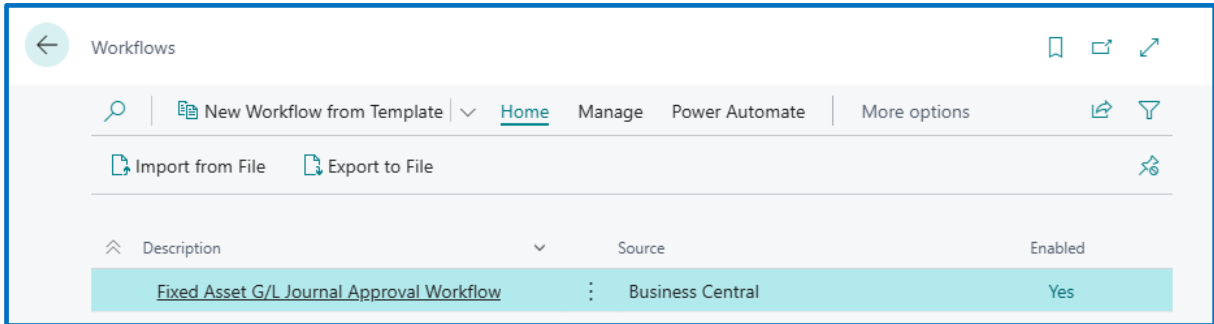


The Action button has the Request for Approval Tab and the Approval flow. The Send Approval Request triggers the request whereas the Cancel Approval Request is for cancelling the Request.

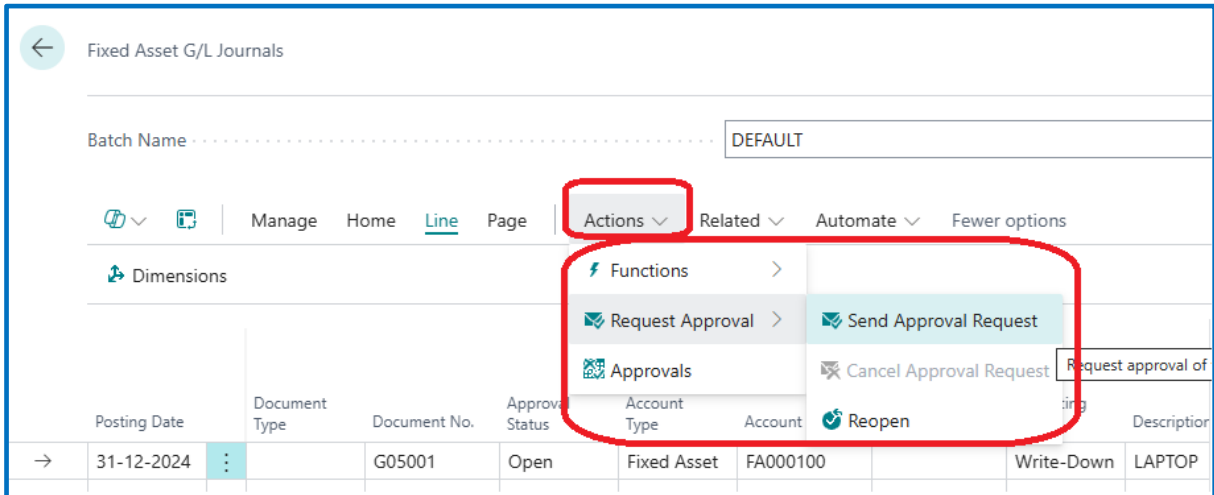


3. Test Case 3: FIXED ASSET G/L JOURNAL

The Workflow setup for the Fixed Asset G/L Journal needs to be setup as shown below providing all the necessary parameters.



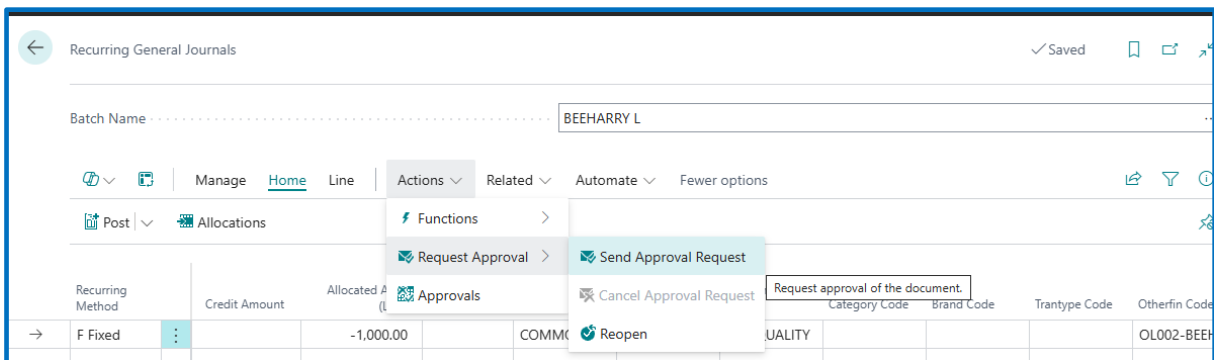
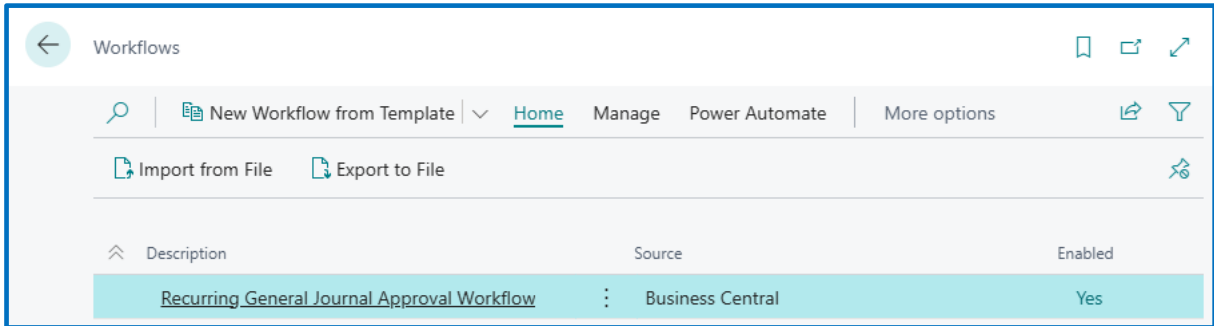
The Action button has the Request for Approval Tab and the Approval flow. The Send Approval Request triggers the request whereas the Cancel Approval Request is for cancelling the Request.



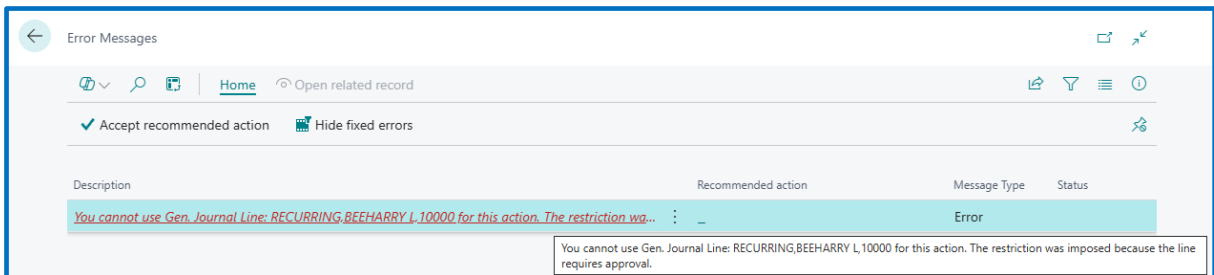
Once the Approval status on the line Released then only the Journal will be allowed to be posted.

4. Test Case 4: RECURRING GENERAL JOURNAL

The Recurring General Journal workflow needs to be setup providing all the necessary parameters.



The Recurring Journal will not allow to post until it is approved



5. Test Case 5: ITEM JOURNAL

The Workflow needs to be setup providing all the necessary parameters.

Workflows

New Workflow from Template | Home | Manage | Power Automate | More options

Import from File | Export to File

Description	Source
Item Journal Lines Approval Workflow	Business Central

Once the setups are done the item journal can be created and sent for approval

Item Journals

Batch Name: DEFAULT

Manage | Home | Line | Page | Actions | Related | Automate | Fewer options

Item Tracking Lines | Dimensions | Item Availability

Posting Date: 6/13/2025 | Entry Type: Positive Adj... | Price Calculation Method: | Document No.: IY000001

Actions menu: Request Approval (selected), Send Approval Request, Approvals, Cancel Approval Request, Reopen, Other

Posting Date	Entry Type	Price Calculation Method	Document No.	Item No.	Description	Approval Status	Consumpti... Request Nos	Location Code	Bin Code	Quantity	Unit of Measure Code
6/13/2025	Positive Adj...		IY000001	1112	PEPSI 300ML X 24	Open		WHMAIN		15,204	CASE

Item Journals

Batch Name: DEFAULT

Manage | Home | Line | Page | Actions | Related | Automate | Fewer options

Item Tracking Lines | Dimensions | Item Availability by

Posting Date: 6/13/2025 | Entry Type: Positive Adj... | Price Calculation Method: | Document No.: IY000001 | Item No.: 1112 | Description: PEPSI 300ML X 24

Posting Date	Entry Type	Price Calculation Method	Document No.	Item No.	Description	Approval Status	Consumpti... Request Nos	Location Code	Bin Code	Quantity	Unit of Measure Code
6/13/2025	Positive Adj...		IY000001	1112	PEPSI 300ML X 24	Pending Approval		WHMAIN		15,204	CA

Item Journals

Batch Name: DEFAULT

Manage | Home | Line | Page | Actions | Related | Automate | Fewer options

Post | Calculate Warehouse Adjustment... | Print... | Get Standard Journals... | Recalculate Unit Amount | Explode BOM

Posting Date: 6/13/2025 | Entry Type: Positive Adj... | Price Calculation Method: | Document No.: IY000001 | Item No.: 1112 | Description: PEPSI 300ML X 24

Posting Date	Entry Type	Price Calculation Method	Document No.	Item No.	Description	Approval Status	Consumpti... Request Nos	Location Code	Bin Code	Quantity	Unit of Measure Code
6/13/2025	Positive Adj...		IY000001	1112	PEPSI 300ML X 24	Released		WHMAIN		15,204	CASE

THE LIST OF STANDARD PAGES WHERE THE CUSTOM WORKFLOWS WERE CREATED:

- 1 **Transfer Order**
- 2 **Physical Inventory Order**
- 3 **Planned Production Order**
- 4 **Firm Planned Production Order**
- 5 **Released Production Order**
- 6 **Fixed Asset Journal**
- 7 **Fixed Asset G/L Journal**
- 8 **Fixed Asset Reclassification Journal**
- 9 **Recurring General Journal**
- 10 **Item Journal**
- 11 **Item Reclassification Journal**
- 12 **Planning Worksheet**
- 13 **Requisition Worksheet**
- 14 **Production BOM**
- 15 **Physical Inventory Journal**
- 16 **Fixed Asset Card**
- 17 **Warehouse item journal**
- 18 **Production BOM version**