

## Document Flow Navigator for Microsoft Dynamics 365 Business Central

### Intended for

SMBs primarily.  
Microsoft Dynamics 365  
Business Central and earlier  
versions users.

### Region

Global

### Industries

Suits all businesses with  
relatively complex business  
processes.

### Languages

English  
Russian

### What you will get

- Daily transparent operations with documents, clear vision of each business process
- Simple tool to make changes into complex business processes.

### What is Document Flow Navigator?

Document Flow Navigator enriches existing Microsoft Dynamics 365 Business Central document flow, project management, planning and other key functionality. It customizes scenarios of document approvals based on document contents, enables collaborative work, provides control over stages, blocks and notifications.

Once the document is created, all related users go through approval stages, they see required resources, deadlines, executives and other relevant information.

This add-on improves your experience of working with Microsoft Dynamics 365 Business Central: you literally interact with the system that leads you within the process, supports and checks your steps, as well as give hints to you and the team to avoid additional time loss or any inconveniences.

Document Flow Navigator does not require programming and is used as a customization tool only. It is an easy-to-use add-on for both standard Microsoft Dynamics 365 Business Central and customized versions.

## Key functionality

- Document approval: sequential and parallel approve, routes and performers depend on document contents
- Templates: automatic fill out of fields and dimensions.
- Executives and deadlines: schedule document approval, identify responsible for each stage, deadline control
- Document control: fields, dimensions, attachments control when approving a document
- Block document: block document header, lines, fields, depending on the user role and the stage of approval
- Notifications: approval request, approval rejection, notifications when changing a document, deadline notifications
- Attachments: create and edit, check attachments of a certain type, delete depending on the user role or approval stage, attachment versions.
- Printed forms: print out depending on the role or approval stage, individual printing forms, combining reports into packages
- Logs: approval history, changes made, notifications and print out
- Delegation: temporary replacement of an employee, temporary redirection of notifications and temporary granting permissions
- Customization: a separate codeunit with a special structure, available for further development. Additional software development is available if customization is not enough to make required changes (functions, checks, etc.). Document Flow Navigator has a gateway for connecting functions from this unit.

## Benefits

- Clear vision of each business process: transparent information about every stage of approval, executives, calendar plan, approval history etc.
- Improves team efficiency due to enriched functionality – more attention on each executive, control over stages, on-time notifications, collaborative work
- Minor implementation cost. Implementation period lasts for 2 days only, no further additional trainings required
- Preconfigured templates assist users to implement routine work faster.