

The samples of the settings

DOCUMENT FLOW NAVIGATOR
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Introduction

Document Flow Navigator (DFN) is a constructor of your own business processes (BP). We describe typical settings in this document.

Functional Roles DFN

Every Dynamics 365 Business Central user should have functional role DFN.

For example:

Role Code	Description
_DFN_00_SUPER	DFN Administrator
_DFN_01_CEO	DFN Chief Executive Officer
...	...
_DFN_10_CFO	DFN Chief Financial Officer
...	...
_DFN_30_PLM	DFN Product Line Manager
_DFN_31_PLM_ASSIST	DFN PLM Assistant
...	...
_DFN_40_CMO	DFN Chief Marketing Officer
_DFN_41_SM	DFN Sales Manager
_DFN_45_SM_ASSIST	DFN Sales Manager Assistant
...	...
_DFN_99_User	DFN any user

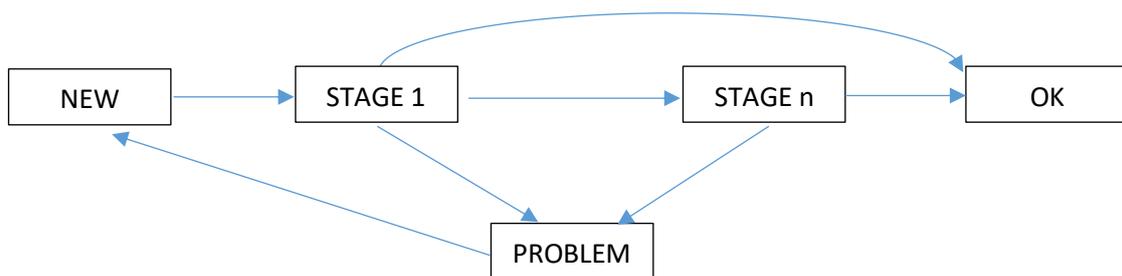
Each process contains several functional roles DFN. If you assign user more than one role, DFN solution choose single priority role.

The samples of the BP Stages.

When BP created, it takes first stage.

We recommend to create stage PROBLEM in the each of the business process.

Typical scheme:



Sales Order

Stage Code	Description	Comment
NEW	New	The first stage
SALES MANAGER	Sales Manager	
FIN	Financial Manager	Check prepayment
WH	Warehouse	Assembling order in the WH
POST	Ready to post	Final stage
PROBLEM	Problem	Any problem

Purchase order

Stage Code	Description	Comment
NEW	New	The first stage
PLM	PLM Approve	
FIN	Financial Manager	Check P&L budget and cash flow ability
MANUFACRORY	Manufactory	
SEA	Delivery by sea	Deadline 20 days
AIR	Delivery by air	Deadline 2 days
WH	Warehouse	
POST	Ready to post	Final stage
PROBLEM	Problem	Any problem

Fixed Asset Card

Stage Code	Description	Comment
NEW	New	The first stage
CFO	CFO	
OK	OK	Ready to use
PROBLEM	Problem	Any problem

Payment Journal

Stage Code	Description	Comment
NEW	New	The first stage
FIN	Financial Manager	Check cash flow ability
POST	Ready to post	Ready to post
PROBLEM	Problem	Any problem

Budget

Stage Code	Description	Comment
NEW	New	The first stage, allow changes
BUDGET HOLDER	Budget Holder	No changes
CFO	CFO	No changes
OK	OK	Ready to use
PROBLEM	Problem	Any problem

Helpdesk request

You can use DFN solution in the any customize documents too. For example, IT request:

Stage Code	Description	Comment
NEW	New	The first stage, allow change
FIRST LINE	First Line support	
DEVELOP	Developing	
TEST	Testing	
IMPLEMENT	Implementation	
OK	OK	
PROBLEM	Problem	Any problem