

Four-Eyes Approval

The screenshot displays the Dynamics 365 Business Central interface for a customer card. The main window shows the 'CUSTOMER CARD' for '01121212 · Spotsmeyer's Furnishings' with a work date of 1/27/2022. The interface includes sections for 'Process', 'New Document', 'Request Approval', 'Navigate', 'Customer', and 'More options'. Financial data such as 'Balance (LCY)', 'Balance Due (LCY)', and 'Total Sales' are visible. A 'Customer Picture' section shows a profile picture of a man. Below this is the 'Address & Contact' section, which is divided into 'ADDRESS' and 'CONTACT' fields. The 'CONTACT' section shows 'Mr. Mike Nash' as the primary contact.

An overlaid dialog box titled 'FOUR-EYES APPROVAL LOG DETAILS' is open, showing a table of approval actions. The table has columns for 'Field No.', 'Field Caption', 'Old Value', 'New Value', and 'DateTime Modified'. The actions include 'Contact', 'Email', and 'Primary Contact No.' changes, all performed on 9/29/2020 at 8:36 AM. The most recent action is 'Blocked', where the value changed from 'CT100132' to 'All'. The dialog box also includes 'Approve', 'Reject', and 'Show All' buttons, along with 'OK' and 'Cancel' buttons at the bottom.

Field No.	Field Caption	Old Value	New Value	DateTime Modified
8	Contact	Andrew Cencini	Mr. Mike Nash	9/29/2020 8:36 AM
102	Email	andrew.cencini@contoso.com	mr.mike.nash@contoso.com	9/29/2020 8:36 AM
5049	Primary Contact No.	CT100132	CT000018	9/29/2020 8:36 AM
39	Blocked	CT100132	All	9/29/2020 8:36 AM

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Four-Eyes Approval Management

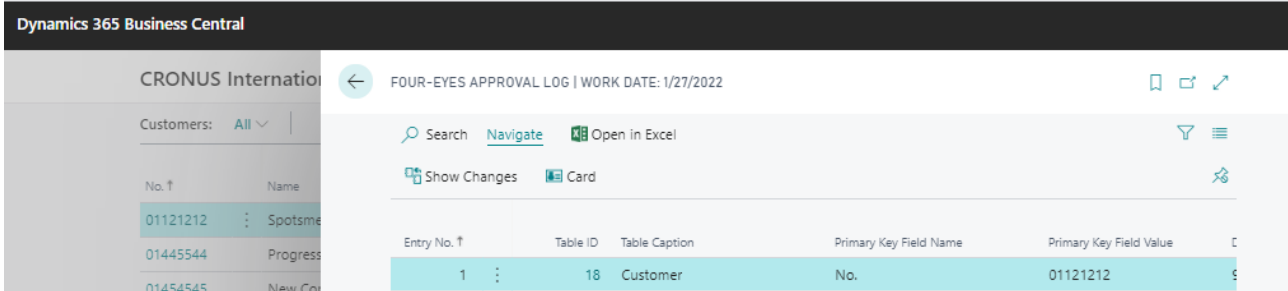
To manage changes in master data tables in Microsoft Dynamics 365 Business Central, ProFacto is offering an approval management solution, where changes will be logged, and an approval must be completed by a supervisor with mandate to do so.

Areas covered by ProFacto Four-Eyes Approval are:

- G/L Account
- Customer
- Vendor
- Item
- Bank Account
- Customer Bank Account
- Vendor Bank Account
- Dimension
- Dimension Value

The assisted setup will easily guide you through setup of ProFacto Four-Eyes Approval. Select the master data you want to be handled by the approval management and the solution is ready to use.

Changes are automatically detected and will be logged in the **Four-Eyes Approval Log**. The log gives you an overview of created or updated records.



Dynamics 365 Business Central

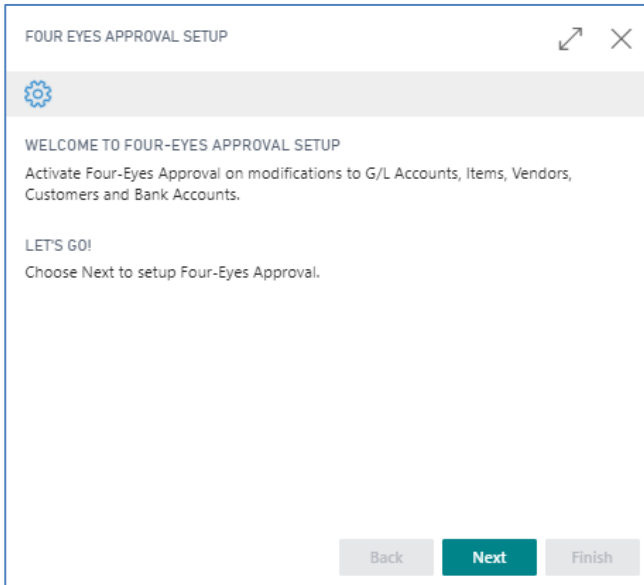
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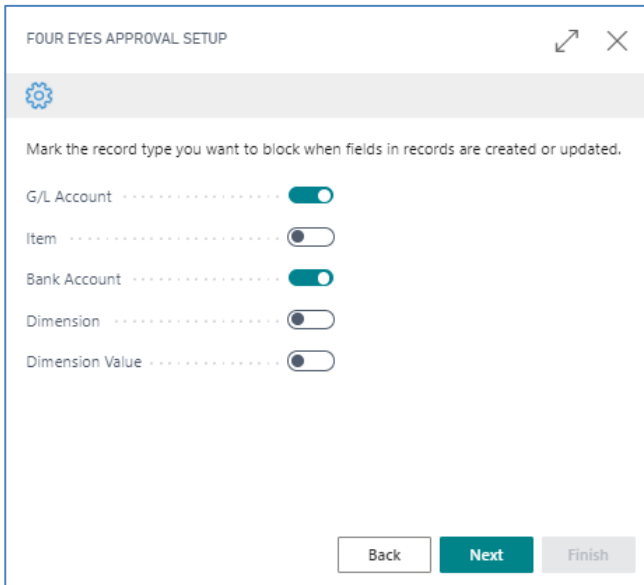
Entry No.	Table ID	Table Caption	Primary Key Field Name	Primary Key Field Value
1	18	Customer	No.	01121212

Setup

Under **Assisted Setup** you will find an assisted setup to guide you through activating ProFacto Four-Eyes Approval.



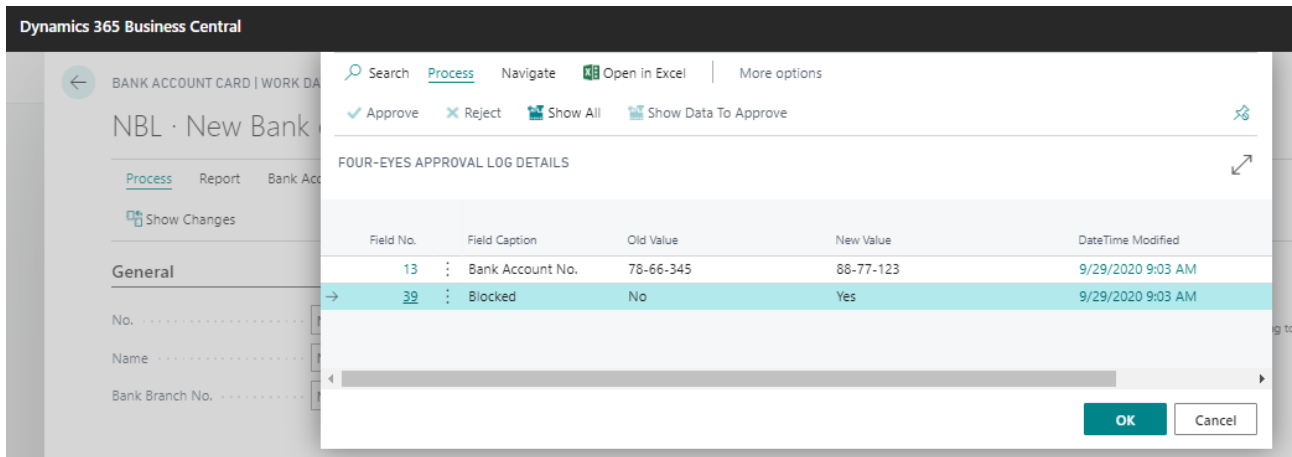
Go through the steps and select the areas to be handled by the approval management solution.



In the final step you must mark the field **Activate Approval Flow** to enable approval management. Now changes in the selected areas are logged.

Example of logged data

Assume Bank Account is selected in Four-Eyes Approval Setup and Four-Eyes Approval is activated. Then changes to bank accounts are logged. After the Bank Account is modified the account is blocked. The user can see the changes by selecting **Show Changes** on the Bank Account Card.



The latest changes are displayed. By default, the changes since the latest approval or rejection are shown. The user who made the last change cannot approve the changes.

In the **Show Changes** page four buttons are available.

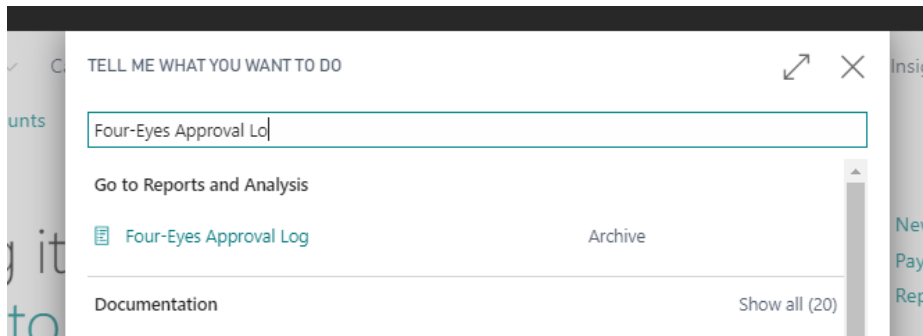
- **Approve**
Approving changes – The Blocked field will be rolled back
- **Reject**
Rejecting changes – The Blocked field will be rolled back. Changes will be rolled back
- **Show all**
Show all changes logged for the current record. Including approved and rejected changes
- **Show data to approve**
Limit with to show unapproved records

When approving or rejecting, the Blocked field will be left in the state it was in before the approval sequence was initiated.

A similar functionality is available on all the other master data cards covered by Four-Eyes Approval.

Overview

To get an overview of the logged changes you can go to the **Four-Eyes approval log**.



This is a complete log for all completed updates for the areas to be monitored by Four-Eyes Approval. By default, the view is limited to show unprocessed (approved or rejected) log entries only.

A screenshot of the Dynamics 365 Business Central interface showing the "FOUR-EYES APPROVAL LOG | WORK DATE: 1/27/2022". The table has columns for Entry No., Table ID, Table Caption, Primary Key Field Name, Primary Key Field Value, DateTime Modified, Date Modified, and several checkboxes for approval and change status. Two rows are visible:

Entry No.	Table ID	Table Caption	Primary Key Field Name	Primary Key Field Value	DateTime Modified	Date Modified	Bloc...	App... Req...	Cha... App...
1	270	Bank Account	No.	NBL	9/29/2020 9:03 A...	9/29/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1	18	Customer	No.	01121212	9/29/2020 8:36 A...	9/29/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

By selecting **Show Changes**, you will access the Detailed Four-Eyes Approval Log for the selected record. The same as shown from the card pages.

The log details for the selected approval log entry will be listed in the **Four-Eyes Approval Log Details** page.

A screenshot of the "FOUR-EYES APPROVAL LOG DETAILS" page. The page has a header with "Search", "Process", "Navigate", "Open in Excel", and "More options". Below the header, there are buttons for "Approve", "Reject", "Show All", and "Show Data To Approve". The main content area is a table with columns for Field No., Field Caption, Old Value, New Value, and DateTime Modified. Two rows are visible:

Field No.	Field Caption	Old Value	New Value	DateTime Modified
13	Bank Account No.	78-66-345	88-77-123	9/29/2020 9:03 AM
39	Blocked	No	Yes	9/29/2020 9:03 AM

At the bottom right of the page, there are "OK" and "Cancel" buttons.

If there are no changes to be approved, a notice saying *No changes to approve* is displayed.

FOUR-EYES APPROVAL LOG DETAILS

Field No.	Field Caption	Old Value	New Value	DateTime Modified
→ - ⋮		< No changes to approve. >		-

As before, from the detailed log you have the four options

- Approve
Approving changes – The Blocked field will be rolled back
- Reject
Rejecting changes – The Blocked field will be rolled back. Changes will be rolled back
- Show all
Show all changes logged for the current record. Including approved and rejected changes
- Show data to approve
Limit with to show unapproved records

When approving or rejecting, the Blocked field will be left in the state as before the approval sequence was initiated.

Approval logic

If *USER A* has made a change to a record it must be approved by another user with permissions to do so. If *USER B* modifies the same record as *USER A* modified, then *USER A* can approve the all the changes regarding this record including own changes.

In short, the user to approve must be different from the last user who updated the record.

Field Blocked usage

Table blocked by approval system

When changes in the master data tables included in the approval management are made, the field Blocked will be set at the time the changes are logged.

Blocked fields of type Boolean (yes/no fields) will be set to “Yes” (TRUE), and blocked fields of type option will be set to “All” during the change logging procedure.

A blocked field set by the approval system, which indicates that the changes have to be approved or rejected, can be changed by approving or rejecting only.

After approving or rejecting the Blocked field is no longer marked “Yes” or “All”.


Changing field blocked manually

A user can set the Blocked field manually. The same user who blocked the master data manually can unblock the same master data without approval.

However, the change of the Blocked field will still be logged.

Unlocking a manually set blocking is possible for another user. This change must be approved by another user before the field Blocked is cleared.

It is not possible manually to unblock when the Blocked field has been set by the system during logging other changes. Then the blocking must be removed by either approving or rejecting the changes.

 Manually unblocking is not allowed when changes are to be approved. Please use "Show changes" to approve.