



Unit: Customization Tools
Topic: Approval Procedures

1-1 Activate approval procedures in the system

Choose *Administration* → *System Initialization* → *General Settings*.

Enable the approval procedures functionality in the system.

1-2 Define an approval procedure using a predefined condition.

If the discount offered in a sales document is more than 25%, the system should block the document until it is approved by the accounting department.

1-2-1 Create an approval stage for manager approval.

Choose *Administration* → *Approval Procedures* → *Approval Stages*.

Field Name or Data Type	Values
<i>Stage Name</i>	Manager
<i>Stage Description</i>	Manager Approvers
<i>No. of Approvals Required</i>	1
<i>No. of Rejections Required</i>	1
<i>Authorizer 1</i>	Select the user “ manager ”
<i>Authorizer 2</i>	Select the Accounting department then choose a user from the list.

1-2-2 Create an approval template.

Choose *Administration* → *Approval Procedures* → *Approval Templates*.

Field Name or Data Type	Values
<i>Name</i>	Discount 25
<i>Description</i>	Discount over 25%
<i>Originator tab</i>	Select the Sales department from the dropdown list. Select <i>all</i> users in the Sales department. Note: To select all users at the same time, select the first row then hold the Shift key and select the last row. All rows will be selected.
<i>Documents tab</i>	Select all <i>Sales – A/R</i> documents.
<i>Stages tab</i>	Select the approval stage you defined earlier – Manager .

Choose the predefined term for *Discount %*.

Field Name or Data Type	Values
<i>Ratio</i>	Greater than
<i>Value</i>	25

Make sure that the **Active** checkbox is set in the approval template.

1-2-3 Test the approval process.

Login as one of the originators (sales users) and create any sales document. Set the **Discount** field as 26%.

Note: If you are unable to login as one of the sales users due to license availability, you can add the user **manager** to the approval template as an originator.

When you **Add** the document, the approval window will display. Enter a suitable message in the *Remarks* field for the approval.

Note: The sales document is now saved as a draft. You can view this document in the *Document Drafts* report.

1-2-4 Approve the document

An alert will appear in the approver's Messages/Alerts Overview window. Select the link to view the approval request. Approve the request. You can optionally enter remarks for the originator.

You can also approve the request in the Approval Decision Report. Choose *Administration* → *Approval Procedures* → *Approval Decision Report*.

1-2-5 Process the approved sales document

The approved sales document will display in the originator's Messages/Alerts Overview window. The document has the status **Draft [Approved]** and you can now **Add** it to the system.

The originator can also access the approved document from the *Approval Status Report*. Choose *Administration* → *Approval Procedures* → *Approval Status Report*.

1-3 Define an approval procedure based on a query.

All service type purchase orders over 25000 must be approved first by the purchasing manager and then by the company owner. You will create a new approval template. You can use the approval stage you created in step 1-2-1.

1-3-1 Create the query

Paste the following query into the Query Generator

Note: This query uses the item number syntax to work with multiple document types and the \$ syntax to reference the active window:

```
SELECT 'true' WHERE $[3.0.0] = 'S' AND $[29.0.number] > 25000
```

Save the query in any category.

To test the query, open a blank purchase order document, choose a vendor and select the *Service* type. Select an expense G/L account and set the total to more than 25000. Keep the purchase order in the active window and choose *Tools* → *Queries* → *User Queries* → *Category* and select the query name. The value 'true' should show in the results if the query conditions are met.

1-3-2 Create an approval template.

Choose *Administration* → *Approval Procedures* → *Approval Templates*.

Field Name or Data Type	Values
<i>Name</i>	Service PO
<i>Description</i>	Service PO
<i>Originator tab</i>	Select a user from the Purchasing department. You can also select the user " manager ".
<i>Documents tab</i>	Select the <i>Purchase Order</i> checkbox.
<i>Stages tab</i>	Select the approval stage you created in step 1-2-1.

Add the query you just created on the *Terms* tab.

1-3-3 Test the approval process

Make sure you are logged in as an originator. Create a service PO with a total greater than 25000.

Enter a suitable message in the *Remarks* field for the approval.

1-3-4 Approve the purchase order

You can approve the purchase order from the Messages/Alerts Overview window or from the *Approval Decision* report.

1-3-4 Test the document rejection process

If you have time, create another purchase order that meets the approval criteria. This time, select *Not Approved* in the Approval Decision report. See what happens when the purchase order is rejected!
