1-1 Activate approval procedures in the system

Choose *Administration → System Initialization → General Settings.*

Choose the *BP* tab.

The checkbox *Activate Approval Procedures* should be selected. Select the checkbox to enable the approval procedures functionality in the system.

Choose *OK.*

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.*

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

Choose *Add.*
1-2-2 Create an approval template.

Choose Administration → Approval Procedures → Approval Templates.

<table>
<thead>
<tr>
<th>Field Name or Data Type</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Discount 25</td>
</tr>
<tr>
<td>Description</td>
<td>Discount over 25%</td>
</tr>
</tbody>
</table>

**Originator tab**

Select the Sales department from the dropdown list. Select all 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.

**Documents tab**

Select all Sales – A/R documents.

**Stages tab**

Select the approval stage you defined earlier – Manager.

Choose the Terms tab.

Select the When The Following Applies.

Choose the predefined term for Discount %.

<table>
<thead>
<tr>
<th>Field Name or Data Type</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ratio</td>
<td>Greater than</td>
</tr>
<tr>
<td>Value</td>
<td>25</td>
</tr>
</tbody>
</table>

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

Choose Add.

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. Choose OK.

**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. Select Approved as the answer and choose Update. You can optionally enter remarks for the originator.

You can also view the approval request in the Approval Decision Report. Choose Administration → Approval Procedures → Approval Decision Report. Select Approved and choose Update.

1-2-5 Process the approved sales document

The approved sales document will display in the originator’s Messages/Alerts Overview window. Select the link to the document. 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

Open the Query Generator and select Execute to open the Query Preview window. Select the Pencil icon to switch to Edit mode, and paste or create the following query:

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

```
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.

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

Choose the Terms tab.

Select the When The Following Applies radio button.

In the lower part of the window, double-click in the first row to open the Query Manager.

Choose the query you just created.

Choose Add.

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.

Choose OK.

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!