Solutions

Unit: Customization Tools
Topic: Approval Procedures

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.***

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

Choose ***Add***.

1-2-2 Create an approval template.

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

Field Name or Data Type	Values
Name	**Discount 25**
Description	**Discount over 25%**
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 %*.

Field Name or Data Type	Values
Ratio	**Greater than**
Value	**25**

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.***

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

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!