

Spotlight - Approvals

Preparation for Spotlight

Preparation if using provided: demo data

1. Import provided Demo data (The script below is based on that demo data)
2. Login with User: alex@sample.com.au; Password: Sample99. Make sure you are in the PO Module.

The Script also works with Standard US Sample Data:

1. Import US Sample Data
2. Login with the same login details as above. Make sure you are in the PO Module
3. Give HW a password in System>>Registers>>Persons Browse Window>> Operations>> Change Password.
4. Double check the Approval rules for PO in the Business Alerts module, so you are aware.
5. To create a PO which needs approval, duplicate any PO above 10.000 USD and save.
6. Attach a PDF to that Purchase Order

SCRIPT:

Standard ERP offers several different options to ensure certain transactions go through the right approval process.

Let's use a Purchase Order as an example.

Our purchaser, Alex, has created a Purchase Order that needs to be approved.

Action: Open the Purchase Orders browse window, then open PO Nr 2422474.

Sam is completing a Purchase Order for a range of instruments at a total cost of 3.050, which exceeds the 1,000 cost limit set by management. So, this Purchase Order needs to be sent for approval as the system will not allow the purchase to proceed without it.

Action: Click the OK checkbox, system will give the message "Not Approved yet". Then click on the Ord. Address tile and show the Approval status

I can see that approval is required, but has not yet been requested. So let's go ahead and submit it.

Action: Click on Operations >> Request Approval

Now we see the status has changed to 'Pending'.

This automatic approval process is based on the settings configured for Purchase Orders. Using approvals puts you in complete control over your business processes, - ensuring compliance with your company's policies.

Action: close PO and PO Browse windows

Now, - I will log in as Henry, who is set as one with the authority to approve this Purchase Order.

Action: Log out using the Key icon, and log in as User: HW, Password: Sample99

As soon as Henry logs in, the Task Manager will pop up and display all pending approval requests. Here we see our recently submitted Purchase Order.

Action: Message should pop up with the PO approval. (If not, highlight the top most activity in TM).

BENEFIT: Receiving these notifications through the Task Manager ensures that these approvals are dealt with on time and without the hassle of constant followup. These approval notifications can also be sent via email and SMS.

Henry would open this activity -

Action: Open it

- where he'll see that it refers to Purchase Order number 2422474 with a value of 3,050 USD.

She can select "Open Record" to open the Purchase Order directly from the activity where all relevant data is accessible.

Action: Click on the "Open Record" button

Henry can also see and access all related attachments with one button.

Action: Press "Open Attachments" on the Activity, and show (but don't open) that a PDF is attached

As everything looks in order, we'll go ahead and approve Alex's Purchase Order.

Action: Close the PO and press Approve. From the Personal Desktop open Register Approval Rules.

Standard ERP offers a comprehensive solution for approvals. If needed, multi-level approvals can be set up as well, in addition to different approval processes and various approvers triggered by different values.

Action: Open the Approval Rule for PO approvals, and show multi-level approval.

Advanced options include forwarding options for approvers on vacation as well as options in selecting from a list of approvers. Let's log in again as Alex and open the Purchase Order.

Action: Log out with the Key icon, and log in as AM. Open Purchase Orders>> PO number 27

We see the Purchase Order has been OK'd -

Action: Show check box OK is ticked then click on the Ord. Address Tile.

- and the status is now set to Approved.

Standard ERP's integrated approval workflow facilitates transparency and allows full control of your business.