Non-Contract Item Approvals

This setting lets the customer account/group website admin decide whether their users need approval to buy non-contracted items. It can be set at the customer account level so that all users are included, or specified at each role or user level. The set of contracted items must have been defined in the contract. Contracted buying rules are usually done in the ERP and integrated online. The setting can be applied at the customer, role or user levels.

NOTE - Contracted items must have been set up and integrated for the customer. Learn more: Contract Buying & Selling

Step-by-step Guide

1. Add ApproveNonContract Field

1. Logged in as website admin, go to **Settings Settings Field Groups**.

2. Use the search to find the required table and field group: customer, role or user. (Here, we searched 'customer' to find the 'customer' table.)

> ✔ **Where to add for Role or User?**
>
> **Role:** add the setting to Role Field Group Name: ROLEFUNCTIONS
>
> **User:** User Field Group Name: ADMINISTRATION
>
> ⦿ User   ADMINISTRATION   User Administration

3. Find the **Field Group Name**: **CustomerDeatils** and click on the radio button.

| Search For : | customer | ● Contains ○ Starts With | Search |

Table Name	Field Group Name	DescriptionTrans
○ Customer	ApproveNonContract	Non-Contract Items Require Approval
○ Customer	CustomerApproveNewUsers	Customer Approve New Users
⦿ Customer	CustomerDeatils	

4. To add the field, click **Fields**.

5. Click **New**.

6. In **Field Name**, select **ApproveNonContract**.

> Modify : New : Delete : Refresh Dictionary : Back : Cancel : OK
>
> 46 records. (4 pages)   [1][2][3]4
>
> **Field Name :** [Please Select .. ▾]
> Field Sequence :
> From Version :   AllowWarehouseSelectionOnOrderLines
> Grid Formatter :   AllowZeroDollarApproval
>   ApplyMinimumOrderCharge
>   ApprovalGroup
> IsHidden :   ApprovalGroupOverBudget
>   ApprovalGroupUnderBudget
>   ApprovalType
>   ApproveNewUsers
>   ApproveNewUsersEmail
>   ApproveNonContract
>   ApproverEmailOverride

7. Decide where the setting should display on the page. In **Field Sequence**, enter a number relative to the other fields. Here, we have entered '161'.

> **Field Name :** ApproveNonContract
> Field Sequence : [161]
> From Version : [3.92]
> Grid Formatter : [Please Select .. ▾]
> IsHidden : ☐

8. To save the field, click **OK**.

9. Refresh the dictionary.

10. *The setting now displays on the Customer Maintenance page.*

Weekly outstanding receipting email address(es) : [   ]

Non-Contract Items Require Approval : ☐

Notes required for non contract purchasing : ☐

Related Resources

- Highlight Contract Products to Customer
- Contract Item Filter Widget
- Contract Product Filtering
- Contract-based Selling & Buying
- Contract Product Ribbons