

Order Approvals



ENABLING THIS FEATURE WITHOUT CONSULTATION WILL PREVENT YOUR CUSTOMERS FROM ORDERING!

This mode requires that we add an 'Order Limit' field to your Advanced User Maintenance screen for your orders to process correctly (no charge). [Please contact us](#) prior to changing any settings.

With the 'Order Limit' field set, you will be able to begin configuring this mode.

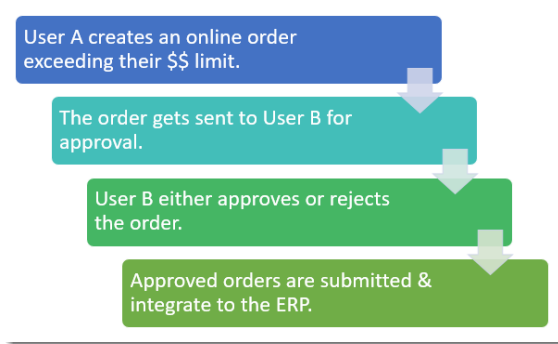
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Overview

Order Approvals allows Customer accounts to add an approval process for its users' orders when their order limits have been reached.

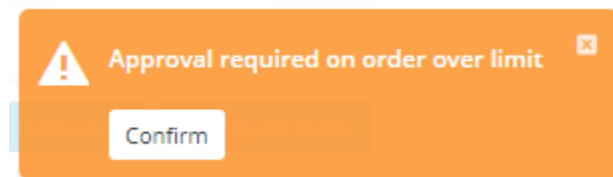
The process goes something like this:



User Experience

Ordering User Experience

1. When Order Approvals is enabled for a Customer account, during Checkout, a popup message alerts the ordering user that approval is required as the order is over their order limit:



2. Depending on the Approval Type mode used and the number of eligible approvers, either an approver is automatically assigned or the user selects one from a dropdown list during Checkout. The order cannot continue without the completion of this step. **Note** - the User is alerted with a message if no Approver is available.

Select Approver

Select Single Approver

Please Select ..

Payment

Approval

The Approval record(s) set for this order are not valid.

3. Once the order has been submitted, the confirmation page reaffirms that the order has been flagged as requiring approval:

Confirmation

Step 3 of 3 - Confirmation

Print

✓ Sent for Approval

Your order has successfully been submitted for approval

The details of your order are displayed below.

Delivery Address

Customer Reference:

123456

Address:

Warehouse

30 Lisburn Street

East Brisbane

QLD

4169

4. The user can view their 'pending approval' orders as well as any that have been rejected in Order History (**Dashboard Order History**). **Note** - approved orders will move to the next stage of the usual order processing procedure.

Order No.	Order Date	Customer Code	Status	Total (ex)	Options
100015788	29/01/2021	AACAB	Cancelled	\$0.00	View
100015780	29/01/2021	AACAB	Approval Required By: sarah.l.testing@...	\$225.95	View

Approver Experience

An approver is another user on the Customer account who has been assigned to the user who submitted the order (mode 0), has a set approval limit high enough for the order total (mode 1) or has been added in an Approver Group (in the Advanced Approval by User and Account mode). When an approver has been assigned an order to approve, they will receive a notification email. See [Order Approver Functions](#).

Order Approval Modes

There are three Order Approval modes that can be set:

- Approval By User** - a very simple 1-to-1 relationship set at the User level. User A's orders are approved by User B if they exceed User A's order limit.
- Approval By User and Account** - the most widely-used mode. User A's orders can be approved by any user on the same account who has the required Approval Limit.
- Advanced Approval By User and Account** - for organisations with complex approval hierarchies and approval groups. This mode offers advanced options, e.g., multi-person approvals and the option to allow the order submitter to cancel 'pending approval' orders and re-assign approvers.

Set up Order Approvals

Enable Approval by Email

For all modes, to enable the approver to approve or reject directly through the email notification, the setting must be enabled for the Customer account.

The following order requires your approval:

[Approve Order](#)

[Reject Order](#)

Order Summary

Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 Body Solid Kettle Bell Set 5-30lbs Code: CV110	1	\$300.00	SET	0.00%	\$300.00
Subtotal (ex GST)					\$300.00
Plus GST					\$30.00
Total (inc GST)					\$330.00

To enable this feature:

1. Go to **Customer Maintenance** in the CMS or on your website.
2. Use the Search tool to find the customer account.

[Search](#) [Customer Details](#) [Catalogues](#) [Cost Centres](#) [Delivery Addresses](#) [Audit](#) [All Users](#)

Search For : ☐ Contains ☒ Starts With ☐ Equals

3. Select the customer account.
4. Click the **Customer Details** tab.
5. Tick **Enable Email Approval**.
6. If you want the approver to add a rejection reason, tick **Required Comments on Email Order Rejection**.

[Search](#) [Customer Details](#) [Catalogues](#) [Cost Centres](#) [Delivery Addresses](#) [Audit](#) [All Users](#)

Modify / Change Customer Code

Customer Code :

Name :

Name :

Address :

Post Code :

Phone Number :

Credit Card Payments for Orders : Yes

Is Order Reference Mandatory : Yes

Apply Minimum Order Charge : Yes

Rejection Note Lines : Yes

Enable Approval Auditing : Enabled

BPAY Reference Number :

Disallow Account Payment Adjustments : Yes

Disable Baynote Recommendations : No

Require Cost Centre on Order Lines (Moved to Setting Def) : No

Default Order Term :

Enable Email Approval : Yes

Required Comments on Email Order Rejection : Yes

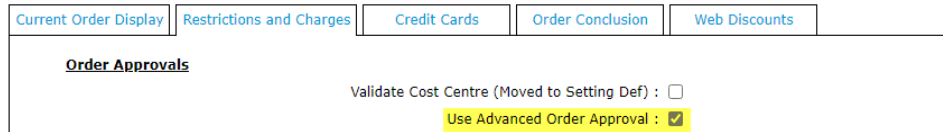
7. Click **OK**.

1. Approval By User

This is the simplest order approval process. A dollar limit is set for the user, and a specific Approver (using their email address) is entered during set up. Any order over the user's limit will require this Approver's Approve or Reject decision. You can set the option of sending an email notification to the Approver, and allow them to quickly approve or reject the order via links in the email.

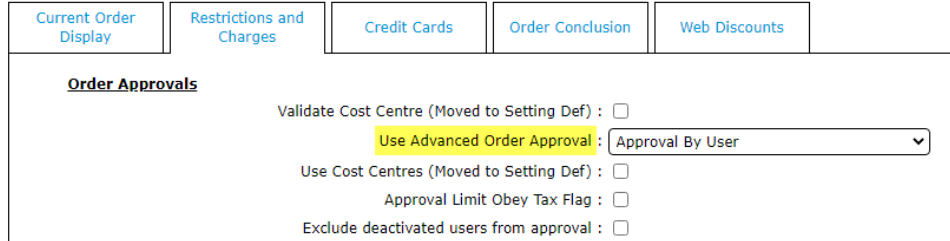
1. Configure system settings:

1. In the CMS, navigate to **Settings Settings**.
2. Select the **Orders** tab.
3. Select the **Restrictions and Charges** sub-tab.
4. Find the checkbox labelled **Use Advanced Order Approval** and ensure it's **unticked**.



The screenshot shows the 'Restrictions and Charges' sub-tab selected. Under the 'Order Approvals' section, the 'Use Advanced Order Approval' checkbox is checked, highlighted with a yellow box.

If you see a dropdown list instead, set it to **Approval By User**.

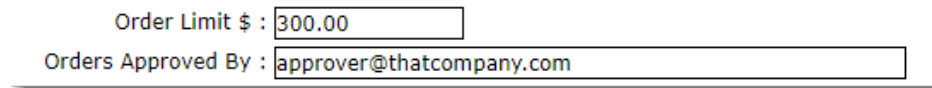


The screenshot shows the 'Restrictions and Charges' sub-tab selected. Under the 'Order Approvals' section, the 'Use Advanced Order Approval' dropdown is set to 'Approval By User', highlighted with a yellow box. Other options include 'Validate Cost Centre (Moved to Setting Def)', 'Use Cost Centres (Moved to Setting Def)', 'Approval Limit Obey Tax Flag', and 'Exclude deactivated users from approval'.

5. To save this setting, click the **Update** button.

2. Update the user order limits:

1. (optional) If you're in the CMS, log into your website in the Administrator role.
2. Navigate to **Users User Maintenance**.
3. Search for and select the ordering user.
4. On the **User** tab, click **Modify**.
5. Update the **Order Limit** field to the dollar value at which approval will be triggered.
6. In the **Orders Approved By** field, enter the email address/user ID of the approving user.



The screenshot shows the 'Modify' user form. The 'Order Limit' field is set to 300.00 and the 'Orders Approved By' field is set to approver@thatcompany.com.

7. Click **OK** to save.

TIP - If you have many users to update, you can do it in bulk. See the help page on [Data Import](#) for more information.

2. Approval By User and Account



This mode will meet the needs of most organisations. If you'd like more than one user per account to be able to approve orders but don't have complex hierarchies for approval permissions, this is the mode to use.

With this mode, users are given order limits for each order function. For example, User A may have a **Requisition Limit** of \$999,999.00, and an **Order Limit** of \$200.00. This means User A can submit an order up to \$200 without approval, but any orders \$200.01 - \$999,999.00 will require approval. If Users B, C, and D on the same account each have an **Approval Limit** greater than the order value, any of them will be able to approve the order.

(If there isn't a user with an appropriate approval limit for the order, a message will be displayed to User A before they submit the order.)

1. Configure system settings:

1. In the CMS, navigate to **Settings Settings**.
2. Select the **Orders** tab.
3. Select the **Restrictions and Charges** sub-tab.

4. In Approval Type, select '**Approval By User and Account**').

Validate Cost Centre : ☐

Use Advanced Order Approval : **Approval By User and Account** ▼

Use Cost Centres : Please Select ..

Approval Limit Obey Tax Flag : **Approval By User and Account**

Exclude deactivated users from approval : **Advanced Approval By User and Account**

5. To save this setting, click **Update**.

2. Update the user order limits:



If you don't see the '**Order Limit**' field on this User tab, [get in touch](#) and we'll add it for you!

1. In the CMS, navigate to **Users Website Users** (or /zUsers.aspx on your website).
2. Search for and **Edit** the required user.
3. In the Customer Details section, update the dollar amounts for the user's **Order Limit**, **Requisition Limit**, and **Approval Limit**.

Customer Details	Customer Code	Order Limit	Requisition Limit	Approval Limit	Delete?
Specify the accounts this user has access to	Freedom Imports (FREEDOM)	350.00	9999999.00	0.00	☐
Add New Account					

4. If the user has access to multiple accounts, you may wish to update the limits for those as well.
5. Click **Save & Exit**.
6. Repeat Steps 2-5 for other users on the account, including users who will have approval authority.

TIP - If you have many users to update, you can do it in bulk. See our help page on [Data Import](#) for more information.

3. Advanced Approval by User and Account



If you want to use Mode 3 approvals, see the help pages on [Advanced Order Approval by User and Account](#) and [Approval Groups](#) to determine the best set-up for your customers. Due to complexity, you may require some consultation with us to determine the best route.

Feel free to [contact us for assistance](#)!

Advanced options can be implemented by Commerce Vision.

Add/Edit Select Approver Widget

The [Select Approver Widget](#) must be added and active for the Select Approver panel to appear during checkout.

Select Approver

Select Single Approver

Please Select ..

If this panel does not display, check the widget is in the Checkout template. Text and labels for prompts displayed in the panel can be edited in the widget.

Edit - Checkout

Add Widget

Zone: Step2

☒ Checkout Review Summary B2B	Edit Options
☒ Checkout Review Summary B2C	Edit Options
☒ Checkout Review Addresses B2B B2B	Edit Options
☒ Checkout Review Addresses B2C B2C	Edit Options
☒ Order Lines	Edit Options
☒ Select Approver B2B	Edit Options
☒ Checkout Gift Card Payment	Edit Options

Configure Email Notifications

The Order Approvals feature rely on email notifications to alert the ordering user and any approver(s) at various stages of the process. The content for each email is set in widgets in email templates used by this feature. Which templates are used will depend on the Order Approval settings for the Customer and User. You do not have to add any additional widgets but email text can be customised to suit your business needs. See Related widgets below.

Optional Settings

Approval by Email

In Mode 1, against the ordering user, you can set 'Approve' or 'Reject' links in the email the approver receives ('Order Approval Email') after the order has been submitted. Clicking the link allows the approver to quickly approve or reject the order.



Order #100015716 Requires Approval

The following order requires your approval:

[Approve Order](#)[Reject Order](#)

Order Summary

Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)

To add the 'Approve'/'Reject' links in the notification email for an ordering user,

1. In the **Advanced User** menu, find the user.
2. Click the **User** tab.
3. Find the field **Enable Email Approver** and tick the checkbox.

Enable Email Approval : ☒

4. To save the setting, click **OK**.

In Modes 2 and 3, this option is set against the Customer account.

Minimum Version Requirements	**.*.*
Prerequisites	--
Self Configurable	No
Business Function	Ordering
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related help

- [Standing Orders Settings](#)
- [Standing Orders Overview](#)
- [Advanced Order Approval by User and Account](#)
- [Change User Order Limits](#)
- [Order Approver Functions](#)
- [Approval Groups](#)

Related widgets

- [Order Approval Status Message Widget](#)
- [Email Order Approval Buttons Widget](#)
- [Orders Approval Order Summary Widget](#)
- [Order Approval New Approver Message Widget](#)
- [Order Approval Replaced Approver Message Widget](#)
- [Email Order Approval Log Information Widget](#)