

Order Approver Functions

This guide is aimed at users who have been assigned to [approve an order](#), either as a direct approver or as a proxy approver.

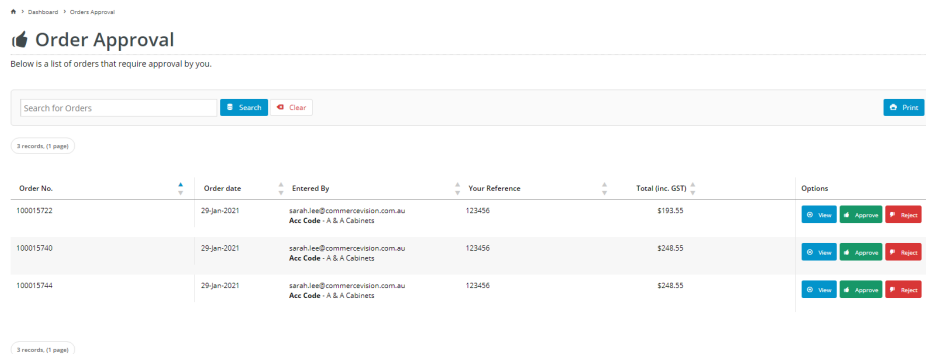
If you are the Approver for another User's order, you will receive a notification email. If adding Approve/Reject links in this email has been enabled, you can simply click on the relevant link depending on your decision:



Otherwise, you can access and view orders pending your decision through the **Approve Orders** menu item on your **Dashboard**.

1. Login to the website and navigate to **Dashboard Approve Orders**.

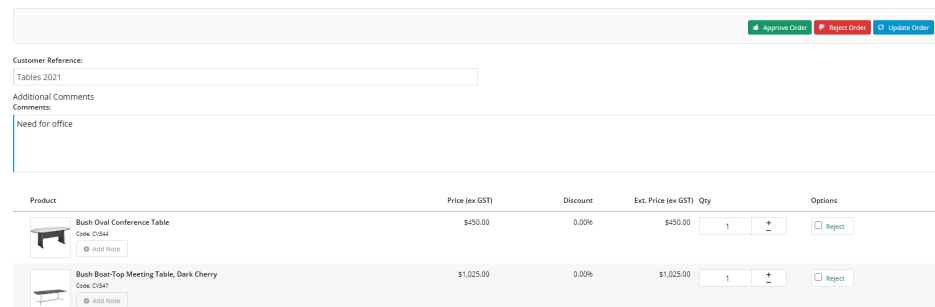
The 'Order Approval' screen lists all orders awaiting approval.



2. For the order you want, select one of the buttons:

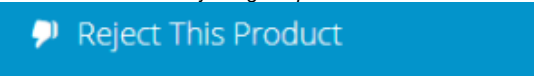
- **View** to see order details. You will also be able to update the order, e.g., add order comments, and remove individual products or change their quantities. The order can also be approved or rejected here.

Tables 2021
Order's Customer: AACAB - A & A Cabinets



To remove an individual product from the order,

- i. Tick the **Reject** box.
- ii. Enter the reason for rejecting the product.

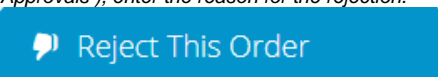


Reason for rejecting product *

Cancel

Confirm and Reject Product

- iii. Click **Confirm and Reject Product**.
 - iv. Click the **Update Order** button. The product will be removed from the order.
 - v. If you want to approve the updated order, click the **Approve** button.
- **Approve** to approve the order. Once approved, the order will disappear from this screen. The user who ordered will receive an 'Order Approved' notification email.
 - **Reject** to reject the order. If a rejection reason must be entered (an option Admin enabled during set up of Order Approvals), enter the reason for the rejection.



Reason for rejecting order: *

Cancel

Reject this Order

Once rejected, the order will disappear from the Order Approval list. Depending on settings, the ordering user may receive an email notifying them that the order has been rejected and cancelled. The rejection reason will be noted in the Cancelled order details.

Approver-reassigned notifications

Depending on how Order Approvals is set up on your website, the User who submitted the order may be able to re-assign the Approver. If that happens, the previous Approver will receive an email notification informing them they are no longer required to approve the order:



The approval of this order has been re-assigned to:

Name Sarah Approver
Email Address CVApprover1@gmail.com
This sales order has been entered online

Users Comments:
Wrong approver first time

The new Approver will receive an email informing them they have been assigned as new Approver:



You have been assigned as the new approver for this order:

Name Sarah Approver
Email Address CVApprover1@gmail.com
This sales order has been entered online

Users Comments:
wrong approver

Related help

- [Order Approvals](#)
- [Advanced Order Approval by User and Account](#)
- [Change User Order Limits](#)
- [Approval Groups](#)