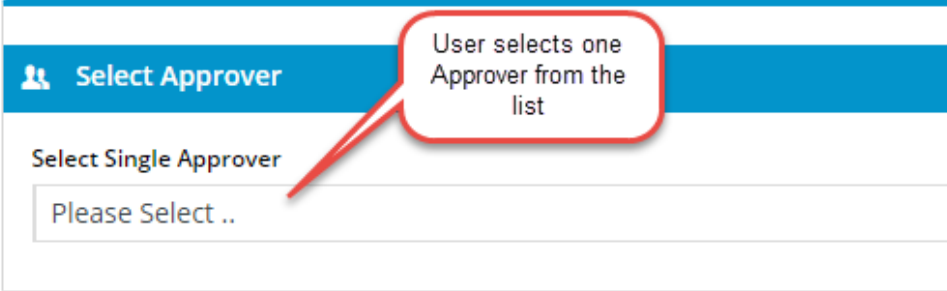



Advanced Order Approval by User and Account

Overview

'Advanced Approval by User and Account' (mode 3) supercedes modes 1 and 2. It provides various ways to configure the order approval process, including the options provided by the previous modes as well as more complex approval arrangements required by some companies' business rules. An approval process can be set up against the User, Role or Customer. If multiple approval processes are active, note that User approvals override Customer ones, and Customer overrides any set against Role.

You should decide which Approval Type will be the most suitable for the Customer or User before continuing. The various options are detailed below.

Approval Type	Description	Requires Approval Groups?	Notes
Single Person User Selected	<p>Allows the ordering User to choose an Approver from a list of valid approvers at Checkout.</p> <p>The user is given order limits for various order functions. For example, a user may have a 'Requisition Limit' of \$999999.00, and an 'Order Limit' of \$200.00. This user can submit orders up to \$200 in value without approval, but any orders \$200.01 - \$999,999.00 will require approval. Users on the same Customer Code with an 'Approval Limit' greater than the order value will be able to approve the order.</p> <p>If there isn't a user with an appropriate approval limit for the order, an error message that there are no approvers with the correct authority will be displayed to the user.</p>	No	 <p>Can also be set up in Mode 0 if only against a User or in Mode 1 for User in an Account</p>
Single Person Auto Selected	Approver is automatically selected from a list of valid Approvers at Checkout.	No	

Multi Person User Selected	Allows the User to choose multiple Approvers from a list of valid approvers at Checkout. Only one selected Approver needs to approve the order.	No	
Multi Person Auto Selected	All available Approvers are automatically selected from the Approval Group . All selected Approvers need to approve the order.	Yes	
Multi Person Auto Single	All available Approvers are automatically selected from a list of valid Approvers. Only one selected Approver need to approve the order.	No	
Multi Person Auto Selected No Group	All available Approvers automatically selected to approve the order. All Approvers need to approve the order.	No	
Hierarchical	Allows a hierarchical list of Approvers in an Approval Group to approve an order. All Approvers need to approve the order.	Yes	
Hierarchical Customer Budget	Allows a hierarchical list of Approvers in an Approval Group to approve an order. All orders are submitted for approval (even when an order is placed by an approving User in the Approval Group).	Yes	

Hierarchical Approval Limits	Allows a hierarchical list of Approvers in an Approval Group to approve an order. Minimum and maximum order amounts are set up for each User in the Group. Approvers are skipped if their range does not include the order amount.	Yes	
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Set up an Order Approval Process

1. Enable Advanced Approval by User and Account

Before you can use this order approval mode, your website needs to be set to this option.

To set this:

1. In the CMS, navigate to **Settings Settings** (or while logged into your website: /zSettings.aspx)
2. Select the **Orders** tab.
3. Select the **Restrictions and Charges** tab.
4. Find the **Use Advanced Order Approval** field, then select **Advanced Approval By User and Account**



If your site is displaying 'Use Advanced Order Approval' as a checkbox, please [get in touch](#) with Commerce Vision and we will update the field to display the dropdown list. However, you can still enable the functionality by ticking the checkbox.

5. Click **Update** to save changes.

2. Decide the level for the Approval Type

Approval Type can be set at the Role, Customer or User level. **Note** - If multiple Approvals are active, User level settings override Customer level settings. Customer settings override Role settings. E.g., An approval process is set for User A, who has the role of a B2B buyer. A Role level approval process has also been set for B2B buyers. The system will use the Approval set up for User A.



How to set an Approval Type at different levels

Set Approval Type at Role level

NOTE - Role level approvals will be overridden by any active Customer or User approvals.

To set Approval Type at the **Role Level**:

1. While logged into your website, navigate to **Roles** (usually in **Account Selection Roles**) (/zRoles.aspx).
2. Click the radio button next to the required Role.
3. Click the **Functions** tab.
4. Click **Modify**.
5. Find the field **Approval Type** and select the required approval type.
6. Find the field **Is Cancel of Approval Orders Comments Mandatory**. Tick if the Approver must enter a reason for rejecting an option.
7. Find **Enable Cancel of Approval Orders**. Tick if the Approver can reject an order.
8. Click **OK** to save.

Set Approval Type at Customer level (without Approval Groups)

NOTE - Customer level approvals are overridden by active User approvals.

To set an Approval Type at the **Customer Level**:

1. While logged into your website, navigate to **Customer Maintenance** (usually in **Account Selection Customer Maintenance**) (/CustomerMaintenance.aspx).
2. Search for the required customer account.
3. Select the record via radio button.
4. Click the **Customer Details** tab.
5. Click **Modify**.
6. Find the field **Order Approval Type** and select the required approval type.
7. Find the field **Enable Email Approval**. Tick if you want the email sent to an Approver to include links they can click on to quickly Approve and Reject an order.
8. Find **Required Comments on Email Order Rejection**. Tick if the Approver must enter a reason for rejecting an option via the email link.
9. Click **OK** to save.

Set Approval Type at Customer level (with Approval Groups)

NOTE - Customer level approval type is overridden by User settings.

NOTE- [Approval Groups](#) must be created for a Customer prior to this step.

To Set Approval Type at the **Customer Level** with 'Approval Groups':

1. While logged into your website navigate to **Customer Approvals** (usually in **Account Selection Customer Approvals**) (/CustomerApproval.aspx).
- Note** - if this page is unavailable, it has to be added to the menu via the [Menu Editor](#).
2. Search for the required customer for which you want to set the Approval Group.
3. Select the record via radio button.
4. Click the **Customer Details** tab.
5. Click **Modify**.
6. Select an **Approval Group** from the drop-down list.
7. Click **OK** to save.

Set Approval Type at User level (without Approval Groups)

NOTE - This setting will override any Customer or Role level settings.

To Set Approval Type at the **User Level**:

1. While logged into your website navigate to **Advanced User** (usually in **Account Selection Advanced User Maintenance**) (/UserMaintenance.aspx).
2. Search for the required user and select them via radio button.
3. Click **Modify**.
4. Find the field **Order Approval Type** and select the required option.
5. Click **OK** to save.

Set Approval Type at User level (with Approval Groups)

NOTE - This setting will override any Customer or Role level settings.

NOTE - Approval Groups must be set up for a Customer prior to this step.

To Set the Approval Type at the **User Level** with 'Approval Groups':

1. While logged into your website navigate to **Advanced User** (usually in **Account Selection Advanced User Maintenance**) (/UserMaintenance.aspx).
2. Search for the required user and select them via radio button.
3. Click the **Accounts** tab.
4. Select the required customer FOR which to set the Approval Group.
5. On the **\$Limits** tab, click **Edit**.
6. Find the field **Approval Group** and select from the drop-down list.
7. Click **Update** to save.

Step-by-step guide

Single Person Approvals

Single Person User-selected

To set up **Single Person User-selected**:

1. Navigate to **Accounts Advanced User Maintenance** (UserMaintenance.aspx?mode=admin).
2. Search for the required User, and select the record via radio button.
3. Click the **Accounts** tab.
4. If the user has multiple Customer Codes, select the correct record via radio button.
5. On the **\$Limits** tab, click **Edit**.
6. Set the value in the **Approval Limit** field to the required dollar amount.
7. Set the value in the **Order Limit** field to the required dollar amount.
8. Set the value in the **Requisition Limit** field to the required dollar amount.
9. Click the **Update** button to save changes.

Repeat Steps 1-9 for other users on the account, including users who will have approval authority.

Single Person Auto-selected

This approval type can be set for a User against a Customer account.

To set up **Single Person Auto-selected**:

1. Navigate to **Accounts Advanced User Maintenance** (UserMaintenance.aspx?mode=admin).
2. Search for the required User, and select the record via radio button.
3. Click the **User** tab.
4. Find **Order Approval Type** and select **Single Person Auto-Selected**
5. Click the **Accounts** tab, and select the Account required.
6. Then on the **\$Limits** tab, click **Edit**.
7. Set the value in the **Approval Limit** field to the required dollar amount.
8. Set the value in the **Order Limit** field to the required dollar amount.
9. Set the value in the **Requisition Limit** field to the required dollar amount.
10. Click the **Update** button to save changes.
11. If the user has other accounts, repeat steps 5-10 for other accounts.

Repeat Steps 1-11 for other users on the account, including users who will have approval authority.

Multi Person Approvals

To set up **Multi Person** Approval:

1. Set the **'Order Approval Type'** at the required level (User, Customer, or Role):
 - a. **MPU** = Multi Person User Selected
 - b. **MPA** = Multi Person Auto Selected
 - c. **MPAS** = Multi Person Auto Single
 - d. **MPANG** = Multi Person Auto Selected No Group
2. Then update the User's **'\$Limits'**:
 - a. Navigate to **'Accounts' --> 'Advanced User Maintenance'** (UserMaintenance.aspx?mode=admin).
 - b. Search for the required User.
 - c. Select the record via radio button.
 - d. Click the **'Accounts'** tab.
 - e. If the user has multiple Customer Codes, select the correct record via radio button.
 - f. On the **'\$Limits'** tab, click **'Edit'**.
 - g. Set the value in the **'Approval Limit'** field to the required dollar amount.
 - h. Set the value in the **'Order Limit'** field to the required dollar amount.
 - i. Set the value in the **'Requisition Limit'** field to the required dollar amount.
 - j. Click the **'Update'** button to save changes.
 - k. Repeat Steps a-j for other users on the account, including users who will have approval authority.



Please Note

Several of the Multi Person approval types require the use of Approval Groups (refer to the table above). Check out our [Approval Groups](#) article for information on how to configure these.

Approval Hierarchies



When using Hierarchical approval types, '**Approval Groups**' must be used. See [Approval Groups](#) for further information.

To Set up **Hierarchical** Approval:

1. Set up the '**Approval Group**' at either the Customer or User level.
2. Set the '**Order Approval Type**' at the required level (User, Customer, or Role) to '**H**'.

To set up **Hierarchical Customer Budget** Approval:

1. In the CMS, navigate to **Settings Settings**.
2. Select the '**Orders**' tab.
3. Select the '**Restrictions and Charges**' sub-tab.
4. Set '**Use Advanced Order Approval**' to '**Advanced Approval By User and Account**'.

Order Approvals

Validate Cost Centre : ☐

Use Advanced Order Approval : Approval By User ▼

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. Click '**Update**' to save changes.
6. Set up the '**Approval Group**' at either the Customer or User level.
7. Set the '**Order Approval Type**' at the required level (User, Customer, or Role) to '**HC**'.

To set up **Hierarchical Approval Limits**:

1. Set up the '**Approval Group**' at either the Customer or User level.
2. Set the '**Order Approval Type**' at the required level (User, Customer, or Role) to '**HAL**'.

Related help

- [Approvals](#)
- [Order Approvals](#)
- [Change User Order Limits](#)
- [Classic sites only](#)
- [Order Approver Functions](#)
- [Order Tracking](#)
- [Order Tracking / Order History](#)
- [Order Tracking for Child Accounts](#)