Spotlight - Approvals

Preparation for Spotlight

Preparation if using demo data attached

1. Import Demo Data
2. Login with

Standard ID: SJ
Password: no password

SCRIPT:

> Action: Log in as: SJ no password

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, Sam, has created a Purchase Order that needs to be approved.

> Action: (open purchase orders browse, and open PO no 27).

Sam is completing a Purchase Order for two Mac Book Pro laptops at a total cost of 2,115, 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: (press OK, system will give the message "Not Approved yet" then click on Comment tab 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 operation >> Request Approval

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

BENEFIT: 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 Audrey, who is set as one with the authority to Approve this Purchase Order.

> **Action: Click Log In Icon and Log In as AM, no password**

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

> **Action: Highlight the activity**

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.

Audrey would open this activity -

> **Action: open it**

- where she'll see that it refers to Purchase Order number 27 with a value of 2,115.

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

> **Action: click on "Open Record" button**

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

> **Action: press "Open Attachments" button on Activity, opens picture of Macbook**

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

> **Action: close PO and press Approved button**

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.

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 Sam and open the Purchase Order.

> **Action: Click on Log In icon, and log in as SJ then open PO browse then PO number 27**

We see the Purchase Order has been OK'd -

> **Action: show check box OK is ticked then click on Comment Tab**

 - and the status is now set to Approved.

> **Action: Close the PO and Browse window and click on Approval Rules from Personal Desktop**

This is a list of all the different options for which approvals can be configured, a variety of choices to accommodate your business needs and processes.

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