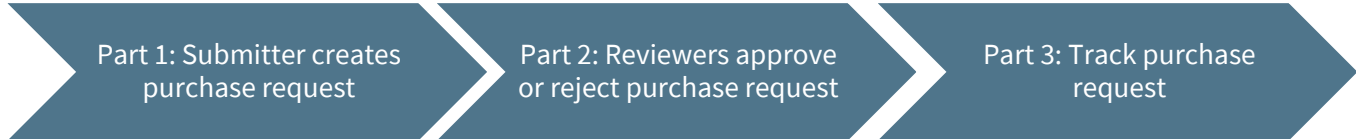


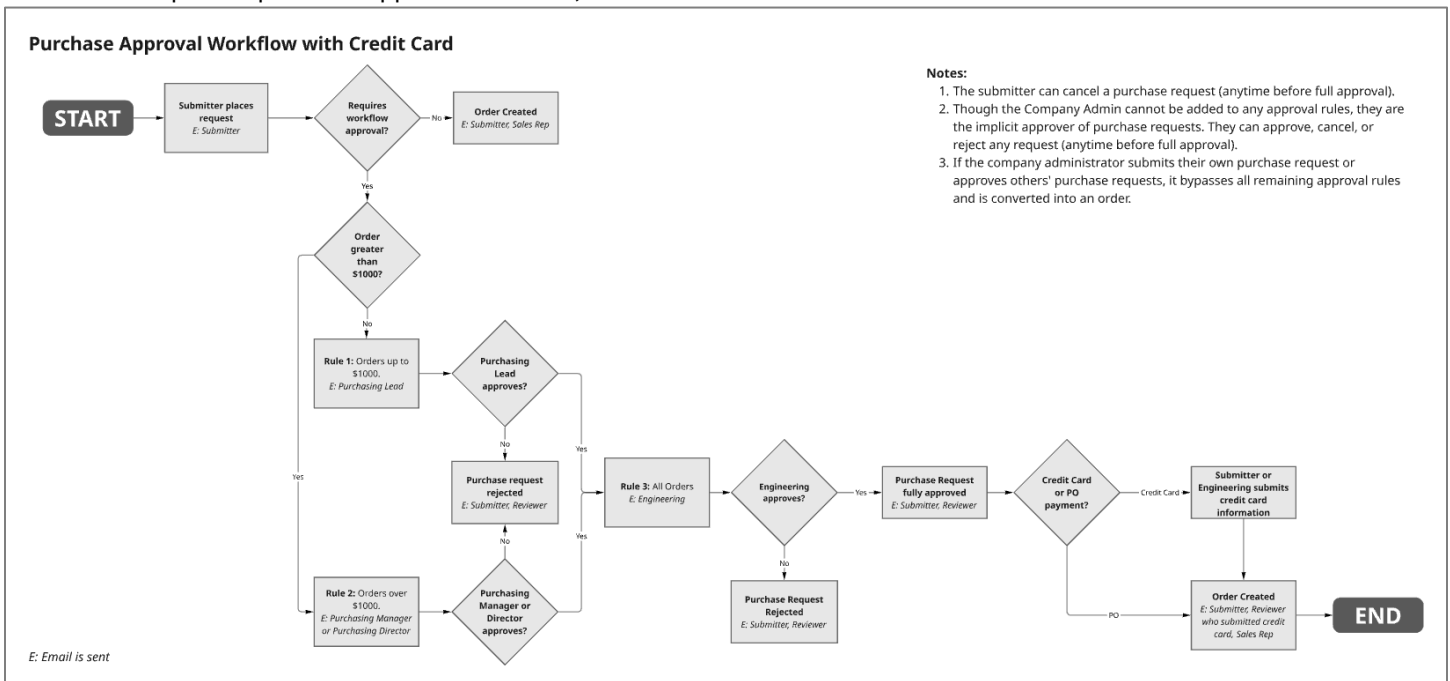
USE PURCHASE APPROVAL WORKFLOW

The purchase approval workflow process provides organizations with the ability to authorize and monitor purchases, ensuring compliance with internal policies and budgetary constraints. The process starts when a user submits a purchase request that requires approval. The purchase request will be sent to a series of reviewer(s) who will approve or reject the purchase request. The purchase request can be cancelled, rejected or approved all the way to become an order.

This document is organized into three parts:



This is an example of a purchase approval workflow, with three rules:




What do I need to know about workflow?

Submitting a purchase request:

- Once the workflow roles, users and rules are established, workflow is turned on. All orders that meet the rules' criteria will go through the workflow approval process.
- Depending on your company's business rules, a purchase request may or may not require approval.
- If the purchase request does not meet any workflow rule(s), an order is created and can be seen on the Order History page.

Approval process:

- A company admin or delegate(s) set up the workflow rules, roles and users. Reach out to them for any questions.
- Your company may use a combination of these approval rules:
 - Direct Approval: Approval is required for all orders, regardless of amount, typically based on managerial levels.
 - Order Total: Approval is required for a specific order amount.
- If the purchase request meets the requirements of the workflow rule(s), the workflow process begins.
 - For each applicable rule, an email is sent to the assigned approval role(s). The email has a link to the purchase request. There is no time limit for the reviewer to approve or reject.
 - If the reviewer approves the purchase request, it is routed to the next applicable rule (email is sent to the next rule's reviewers).
 - Only one reviewer per rule is required to approve or reject the purchase request.
 - For example: For any orders over \$1000, a Purchasing Manager or Purchasing Director must approve. There are five Purchasing Managers and one Purchasing Director. All six people receive an email to review the purchase request. After any one of the six approve, the purchase request continues to the next applicable rule.
 - Though the Company Admin cannot be added to any approval rules, they can cancel, reject or approve any purchase request. If approved, the purchase request is converted to an order and bypasses all remaining rules.
 - If any reviewer rejects the purchase request, the workflow ends.
 - The requester can cancel the purchase request before it is rejected or the last approval. The workflow ends.
 - Once the purchase request is approved by all necessary role(s):
 - If the original payment method at Checkout is PO, the purchase request becomes an order. The order is visible on the Order History page.
 - If the original payment method at Checkout is Credit Card:
 - An email is sent to the submitter and final approvers (all reviewers for the last rule). The email states that credit card information must be entered on the purchase request.
 - The submitter or final approvers clicks "Enter Payment Details" on the Purchase Request and enters the credit card information.
 - The user can change the payment option to PO at this time.
 - Throughout the approval process, users can track the purchase request activity on the Purchase Request page.
 -  If the workflow is changed (rule is added/removed/disabled or entire workflow is disabled), all pending orders will automatically get approved.

Part 1: Submitter creates purchase request

1. Once the checkout screen is complete, the submitter clicks “Submit Purchase Request.”

2. The submitter sees the Purchase Request Confirmation page.

Note: If the purchase request does not need to be approved through workflow, the submitter will receive an order confirmation email when the order is created.

Submitter can track or cancel purchase request

The submitter can track the status on the Purchase Request page.

If necessary, the submitter can cancel a purchase request during the workflow process, as long as it is in the “Decision Pending” status (not yet rejected or has not received final approval). Reasons why the submitter cancels a purchase requisition:

- Submitter no longer needs the items.
- Submitter changes mind about the items.
- A submitter cannot approve their own purchase request. If the submitter is the only reviewer for a rule, s/he must cancel the purchase request and workflow process ends.

1. Access the **Account** menu and click on **My Account** in the dropdown.

2. Click **Purchase Request** in the left My Account menu.

3. To view purchase requests that you submitted, select **My Pending Request** in the dropdown. Click **Apply**.

4. Review the list of purchase requests. Click **View** to display the purchase request details, including the status and activity log.

Date	PR#	User	Status	PO #	Total
Sep 19, 2024	24000000021	Requester Tester	DECISION PENDING	324234234	\$ XX.XX
Sep 19, 2024	24000000018	Requester Tester	DECISION PENDING	34435	\$ XX.XX

5. If you need to cancel the purchase request, click **CANCEL**.
 - a. Click **Yes, Cancel It** to confirm.

CANCEL
5

Placed 42 minutes ago | Thu, Sep 19, 2024

Purchase Request # 24000000018

This purchase request is **PENDING** Status updated 41 minutes ago | Thu, Sep 19, 2024

Request Submitted

Pending Approval

Order Submitted

Activity

- PurchaseManagerExample approved purchase request. Reviewed and approved. Tue, Oct 22, 2024
- Requester Tester submitted purchase request. Tue, Oct 22, 2024

Customer

Stacey-G-CA-ans-contract

Requester Tester

Order

Purchase Request # 24000000018

PO # 34435

Shipping Details

Admin6 Test

Shipping Preference: Ship when available

Carrier Preference: Best Available

Item Summary

Select All Add To List ▼ Add To Cart

	Qty	Total
ZIGG TECHNOLOGIES Control Panel, 100 to 240 VAC at 50/60Hz, 14 VDC, 1.7 A MFR #: ZIGG-GCCE-345 Part #: 9793610 US \$ XXXX / Each	5	\$ XXXXX

1 of 1 results

Subtotal	\$ XXXXX
HST	\$ XXXXX
Total	\$ XXXXX

Cancel purchase request

This action cannot be undone. Are you sure you want to cancel the selected purchase request?

Cancel

Yes, Cancel It

5a

Part 2: Reviewers approve or reject purchase request

1. Access the **Account** menu and click on **My Account** in the dropdown.
2. Click **Purchase Request** in the left My Account menu.
3. To view purchase requests that you submitted, select **My Pending Request** in the dropdown. Click **Apply**.
4. Click **View** to access the purchase request.

Purchase Request 3

- My Pending Request
- Pending Approval
- Canceled
- Rejected
- All Company Requests
- My Pending Request**
- Payment Pending

Purchase Request 4

My Pending Request Reset

Date	PR#	User	Status	PO #	Total	
Sep 19, 2024	2400000021	Requester Tester	DECISION PENDING	324234234	\$ XXXXX	View
Sep 19, 2024	2400000018	Requester Tester	DECISION PENDING	34435	\$ XXXXX	View

5. Review the purchase request details.
6. Click **Reject** or **Approve**.
 - a. To reject, enter a **comment**. Click **Reject**. The workflow ends.
 - b. To approve, enter an optional comment. Click **Approve**. If there are additional workflow rules, the purchase requested is routed to the next reviewers.

Note: Though the Company Admin cannot be added to any approval rules, they can cancel, reject or approve any purchase request. If approved, the purchase request is converted to an order and bypasses all remaining rules.

Purchase Request # 2400000018 5 6

Placed 1 hour ago | Thu, Sep 19, 2024

This purchase request is **PENDING** Status updated 1 hour ago | Thu, Sep 19, 2024

Request Submitted Pending Approval Order Submitted

Customer
Requester Tester

Order
Purchase Request # 2400000018
PO # 34435

Shipping Details
Admin ID Test
Shipping Preference Ship when available
Carrier Preference Best Available

Item Summary

Select All Add to List Add To Cart

Item	Qty	Total
2GIG TECHNOLOGIES Control Panel, 100 to 240 VAC at 50/60Hz, 14 VDC, 1.7 A MFR #: 2GIG-GCCE-345 Part #: 9793620 \$ XXXX / Each	5	\$ XXXXX

Subtotal \$ XXXXX
HST \$ XXXXX
Total \$ XXXXX

6a

Reject purchase request(s)?

This action cannot be undone. Are you sure you want to reject the selected purchase request(s)?

Leave a comment *

Leave a comment for the submitter (required)

250 character max

CANCEL REJECT

6b

Approve purchase request(s)?

This action cannot be undone. Are you sure you want to approve the selected purchase request(s)?

PO # *

34435

Leave a comment

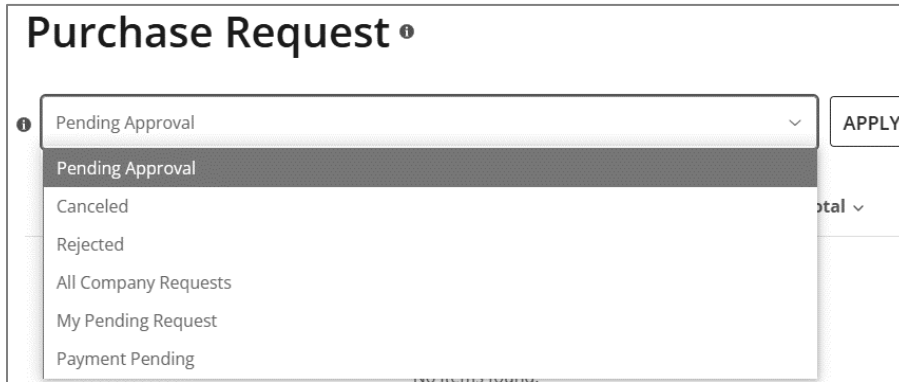
Leave a comment for the submitter.

250 character max

CANCEL APPROVE

Part 3: Track purchase request

As a reminder, submitters and reviewers can track purchase requests on the Purchase Request page. Use these dropdown options to locate a purchase request:



Dropdown	Who will see what
Pending Approval	Reviewer sees requests they need to approve or reject (status = Decision Pending).
Canceled	Submitter sees their own purchase requests that they cancelled themselves.
Rejected	Submitter sees their own purchase requests that were rejected.
All Company Requests	All purchase requests created by anyone at the company which are in the approval process.
My Pending Request	Submitters see their own purchase requests that are pending approval.
Payment Pending	Purchase requests that need payment information so that it can be converted to an order.