

# SET UP 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.

If you require your online orders to go through an approval process, then you need to set up a workflow approval.

## How do you set up workflow?

This document details all the steps to set up workflow. Once all these parts are complete, purchase workflow is activated immediately.



## Who sets up workflow?

The Company Admin can setup workflow. If additional users will do the setup, the Company Admin will assign them to these roles on the Roles and Permissions page:

- Set up approval roles: Manage Users & Roles
- Set up approval rules: View Approval Rules; Create, Edit and Delete Approval Rules

## What are approval rules?

There are two types of rules, which can be used in combination or as a single standalone rule. The maximum number of rules is 10 total (combination of direct approval and order total).

1. Direct Approval: Approval is required for all orders, regardless of amount, typically based on managerial levels.
2. Order Total: Approval is required for a specific order amount.

Refer to the “Using Purchase Approval Workflow“ document for details on the submitters’ and reviewers’ experience.

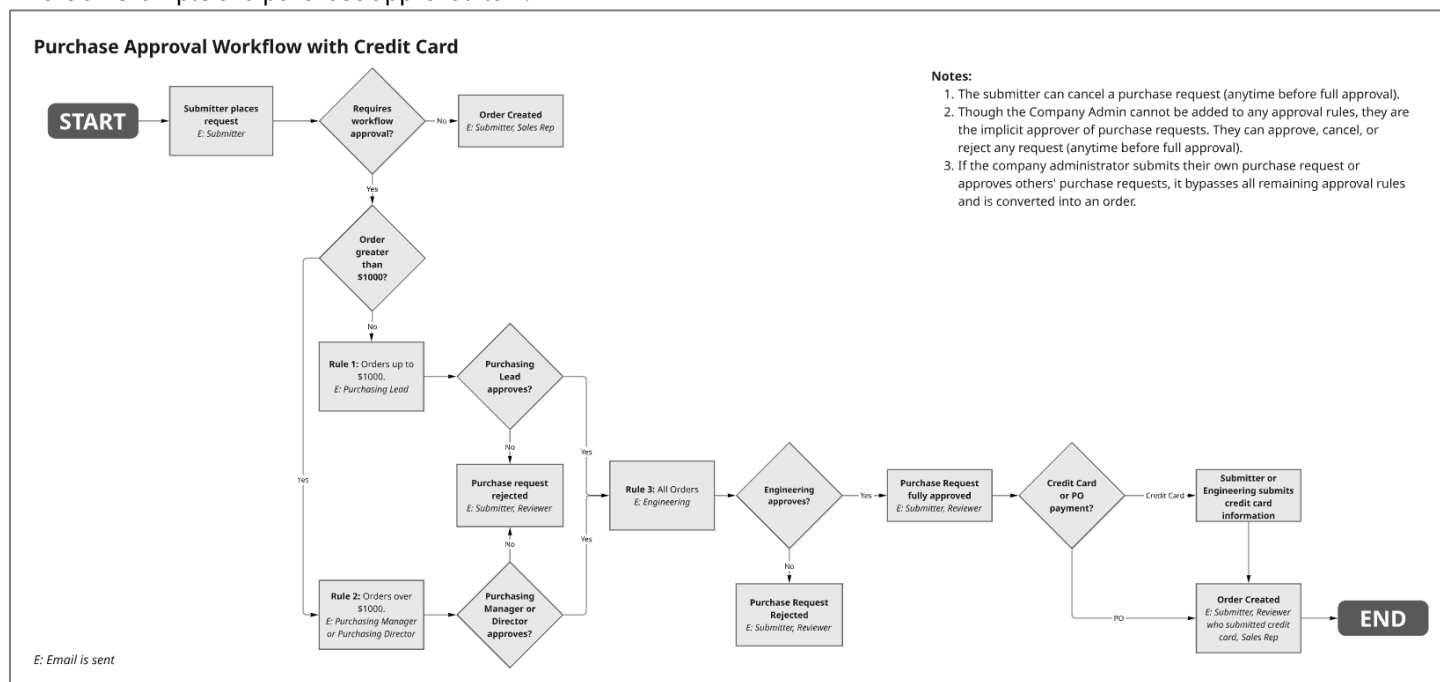
## Part 1: Define the purchase approval strategy (offline)

First, complete the worksheet on the following page to help your business identify the workflow approval rules, necessary roles and users that need to be involved. Work with the necessary stakeholders at your company to align on the purchase approval strategy and expectations.

This is an example of a purchase approval worksheet:

Sequence	Approval Rule Name and Description	Rule Type Direct Approval or Order Total	Reviewer Role(s)	Reviewer User(s)
			⚠ If multiple roles are assigned to a rule, only one <u>user from any of those roles</u> needs to approve or reject the purchase request.	
1	Orders up to \$1000 (Purchasing Lead)	Order total is less than or equal to \$1000	Purchasing Lead	Paul Linden
2	Orders over \$1000 (Purchasing Manager or Director)	Order total is more than \$1000	Purchasing Manager	Peter Moore, Pietro Matisse
			Purchasing Director	Paula Dixon
3	All Orders (Engineering)	Direct Approval	Engineering	Ernie Easton, Eugene Earl

This is an example of a purchase approval flow:



**Worksheet Template**

The maximum number of rules is 10 total (combination of direct approval and order subtotal).

Sequence	Approval Rule Name and Description	Rule Type <i>Direct Approval:</i> Approval is required for all orders <i>or</i> <i>Order Total:</i> Order total is more than, less than, more than or equal to, less than or equal to AMOUNT. The least amount that can be entered is \$0.01	Reviewer Role(s) These are website role(s) that will be asked to review this rule.	Reviewer User(s) These are website user(s) that are assigned to the role in the previous column.
			⚠ If multiple roles are assigned to a rule, only one <u>user from any of those roles</u> needs to approve or reject the purchase request.	
1				
2				
3				
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10				

## Part 2: Set up approval roles

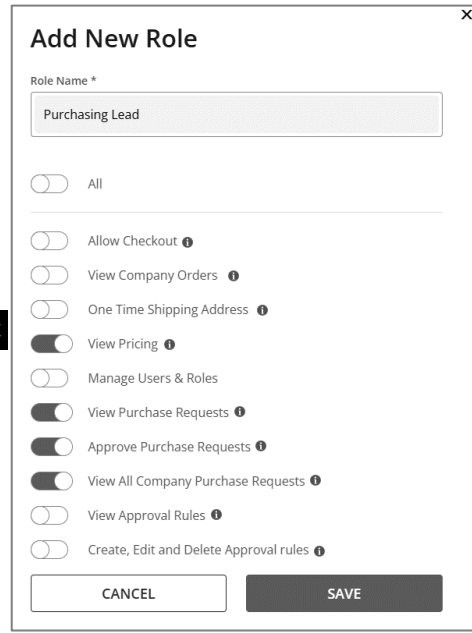
Once the worksheet is complete, the Company Admin or anyone with access to “Manage roles and permissions” can set up the approval roles. At a **minimum**, the table below contains the roles and permissions required for workflow. Additional permissions can be added based on your business needs.

Permission	Submitter Role	Reviewer Role	Optional: Workflow Administrator Role (To assist Company Admin setup approval roles, users and rules)
<b>Allow Checkout</b> User can checkout or submit purchase request (if workflow is enabled).	Required		
<b>View Company Orders</b> Turn the toggle on to display the All Orders tab on the Order History page. On the All Orders tab, the user can view and track all company purchases in one place, including offline orders.			
<b>One Time Shipping Address</b> Allows users to enter a new shipping address at Checkout.			
<b>View Pricing</b> Allows users to access invoices and see pricing across the site, including on product pages, cart, checkout and order screens. If off, prices and invoices won't be visible.		Required	
<b>Manage Users &amp; Roles</b> User can maintain roles and permissions. User can maintain users and assign a role.			Required
<b>View Purchase Requests</b> User can view their own purchase requests.	Required	Required	
<b>Approve Purchased Requests</b> User can review, approve or reject purchase requests.		Required	
<b>View All Company Purchase Requests</b> User can view all company purchase requests.		Required	
<b>View Approval Rules</b> User can view approval rules and assigned roles.			Required
<b>Create, Edit and Delete Approval Rules</b> User can maintain approval rules and assigned roles.			Required

## Steps to set up the approval roles

1. Access the **Account** menu and click on **My Account** in the dropdown.
2. Click **Roles and Permissions** in the left My Account menu.
3. Create any required roles, if necessary, to match your worksheet in Part 1.
  - a. Click **ADD +**.
  - b. Enter the **Role Name**.
  - c. Toggle on the necessary permissions.
  - d. Click **Save**.

Once all roles are created, proceed with Part 3: Set up approval users.



**Add New Role**

Role Name \*

Purchasing Lead

All

Allow Checkout ⓘ

View Company Orders ⓘ

One Time Shipping Address ⓘ

View Pricing ⓘ

Manage Users & Roles

View Purchase Requests ⓘ

Approve Purchase Requests ⓘ

View All Company Purchase Requests ⓘ

View Approval Rules ⓘ

Create, Edit and Delete Approval rules ⓘ

## Part 3: Set up approval users

Once the roles are created to support workflow, the Company Admin or anyone with access to “Manage users and teams” will set up the necessary workflow users.

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

**Tip:** If there is only one reviewer identified for a rule, consider including a backup reviewer in case the original reviewer is unavailable.

1. Access the **Account** menu and click on **My Account** in the dropdown.
2. Click **Company Users** in the left My Account menu.
3. Review the existing users. If an existing user needs to be assigned to a different role to match your worksheet in Part 1:
  - a. Click **Edit**.
  - b. Update the **Role** using the dropdown.
  - c. Click **Save**.

**3b**

The 'Edit User' form is displayed in a modal window. It includes the following fields and options:

- First Name \***: PurchasingManagerA
- Last Name \***: Example
- Role \***: Purchasing Manager (dropdown menu)
- Job title \***: PurchasingManagerA
- Email \***: Stacey.Klaus+PurchasingManagerA@wescodist.com
- Phone \***: 111-222-3333 (with a placeholder xxx-xxx-xxxx below)
- Status \***: Active (dropdown menu)
- Buttons**: Cancel and Save

4. Create any new users to match your worksheet in Part 1, if necessary.
  - a. Click **ADD +**.
  - b. Enter **First Name** and **Last Name**.
  - c. Select **Role** using the dropdown.
  - d. Enter the **Job title**.
  - e. Enter the **Email**.
  - f. Enter the **Phone**.
  - g. For **Status**, select **Active**.
  - h. Click **Save**.

**4**

The 'Add New User' form is displayed in a modal window. It includes the following fields and options:

- First Name \***: PurchasingLeadA
- Last Name \***: Example
- Role \***: Purchasing Lead (dropdown menu)
- Job title \***: PurchasingLeadA
- Email \***: PurchasingLead@wescodist.com
- Phone \***: 890-234-2345 (with a placeholder xxx-xxx-xxxx below)
- Status \***: Active (dropdown menu)
- Buttons**: Cancel and Save

Once all users are created and assigned to the correct role, proceed with Part 4: Set up approval rules.

## Part 4: Set up approval rules

Once the roles and users are created to support workflow, the Company Admin or anyone with access to “Create, Edit and Delete Approval Rules” will set up the necessary approval rules.

### Steps to set up the approval rules

1. Access the **Account** menu and click on **My Account** in the dropdown.
2. Click **Approval Rules** in the left My Account menu.
3. Create each rule to match your worksheet in Part 1.

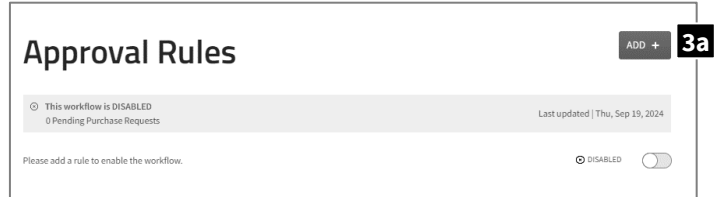
- a. Click **ADD +**.
- b. Enter the **Rule Name**.
- c. Enter the **Description**.
- d. Select the **Rule Type** (Direct Approval or Order Total).
- e. If Order Total is selected:
  - i. Select the **Order Total** description.
  - ii. Enter the **Amount**. The least amount that can be entered is \$0.01.
- f. Select the **role(s)** that must approve this rule.

If multiple roles are assigned to a rule, only one user from any of those roles needs to approve or reject the purchase request.

- g. Click **Save**.

4. Sequence the rules to match your worksheet by dragging the row to the correct order.
5. Enable each rule using the toggle.
6. Enable the entire workflow using the toggle.

**Note: Please verify that the necessary rules and entire workflow is enabled, or workflow will not be activated.**



3a

Direct Approval Example

Order Total Example

3f

3e

Status	Step	Rule	Type
ENABLED	1	Orders up to \$1000 (Purchasing Lead)	Order Total
ENABLED	2	Orders over \$1000 (Purchasing Manager or Director)	Order Total
ENABLED	3	ALL Orders (Engineering)	Direct Approval

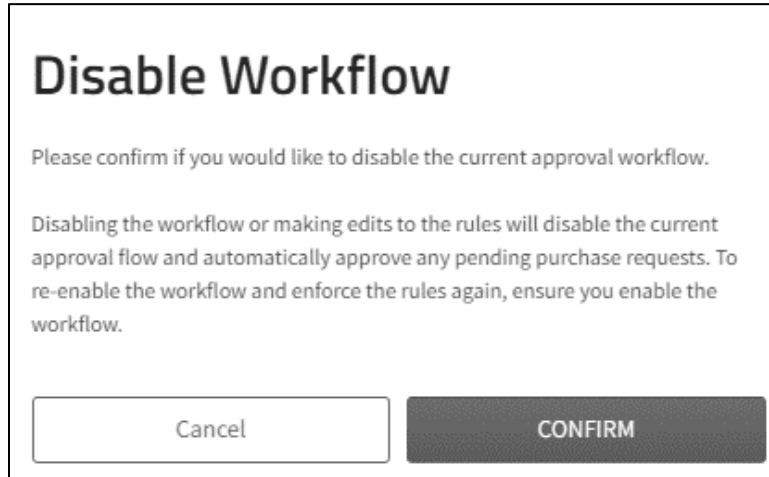
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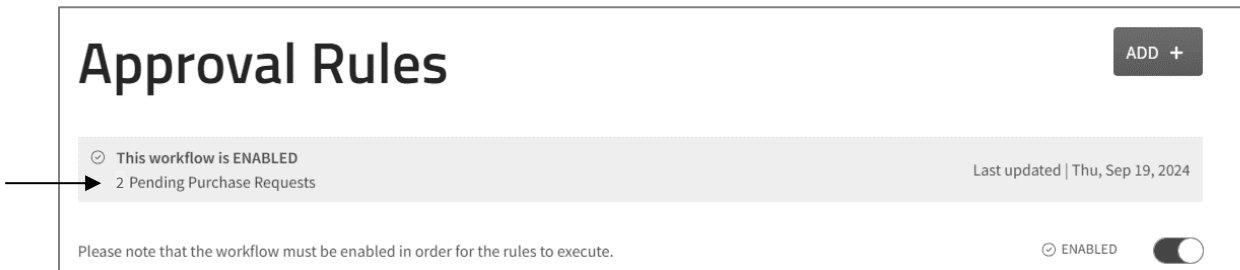
**⚠ Please read these important guidelines to enable and disable rules and the entire workflow**

- Individual rules or the entire workflow can be enabled and disabled.
- These precautions exist:
  - If an individual rule is disabled, the entire workflow is disabled.
  - If an individual rule is enabled, the entire workflow is disabled.
  - If you would like to use the remaining enabled rules, the entire workflow must be manually re-enabled.



*If the workflow is disabled, the user will see this warning message.*

- **⚠** If a rule or the entire workflow is disabled, all the pending orders will automatically get approved. Therefore, it is very important to limit change access to the Approval Rules page.



*The number of pending purchase requests is displayed. Before disabling a workflow, consider waiting until there are no pending purchase requests.*

**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.**

Refer to the "Use Purchase Approval Workflow" document for details on the submitters' and reviewers' experience.