How to Set Up an Order Approval Workflow

If you require your online orders to go though an approval process, then you need to set up a Workflow Approval. There are two types of workflows, which can be used either in combination or as standalone tasks.

Levels Approval

This is used when you require authorization to approve orders based on managerial levels. You can have up to three levels of approval and in each level, you can have multiple approvers.

Threshold Approval

This approval is based on the order value. You can have as many of these as are required.

Setting Up the Workflows

- Workflows can only be set up by users who have **Administrative Access.**

- Once you are logged into your account, navigate to the **My Accounts** section in the left hand menu. Click on the account which you want to set up the workflow.

- Once you open the account page you will see two options to add either a **Level Workflow** or a **Threshold Workflow**.

  Click the + sign for the one you want to create. You can also create a combination of both workflows.

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Name your Workflow, enabling easy identification on Pending Orders. If you are going to combine a Level Workflow with a Threshold Workflow, you may prioritize the order of your workflows. Press the **Next** button and then click on the first level to add approvers.

Select the available approvers from the users in the left-hand box and press the **Add** button to add them to the Approver List. Please note that the user must have logged into the online account at least once to show in the available user list. Once you have added the approvers, press the **Done** button. You now have the choice to add another Level or just **Save** and exit.

Click on the + sign to create a Threshold Workflow. Give the workflow a name and add the Threshold amount; this is the minimum value. Any order above this value will need approval. (e.g., if you enter $100 then all orders over this value will need approval if it's under this value it will not.) Add the users to the Approver List and **Save**.

Under the account you can now see the workflows you have set up and which approvers are in each step.

- Once an order is placed by a user, it will generate an email which will be sent to all the approvers in the first workflow. In the example above Level one, only one approver needs to take action.

- There is a link in the email and the approver clicks on this link to open the online account.

- The Approver can navigate to the **Order Approvals** section in the left hand menu to find the order.

- Once the Approver(s) open the order at the bottom, there is the option to Approve or Reject the order and to add a comment. This will generate an eMail to the user who placed the order to confirm the order status.

- The requestor can check the status of their order under the **Recent Orders** section and they can see which Workflow is being used to review the order.