

How to Set Up an Order Approval Workflow

If you require your online orders to go through 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.

Account Number	Account Name
103338	EMEA Demo Act.

- 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.

Approval Workflows

Add Level Workflow

A Levels Workflow can be the first workflow requiring up to three levels of approval before Threshold Workflow approvals, or the last workflow requiring up to three levels of approval after Threshold Workflow approvals.

Add Threshold Workflow

When enabled, orders with a subtotal at or above the threshold amount require approval.



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Levels Workflow

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.

Level Workflow
When enabled, all orders require one to three levels of review.

1 Workflow Detail 2 Approver List

Workflow Name
Manager Approval

Workflow Position
A Levels Workflow can be the first workflow requiring up to three levels of approval before Threshold Workflow approvals, or the last workflow requiring up to three levels of approval after Threshold Workflow approvals.
 First Workflow Last Workflow

Cancel Next

Level Workflow
For each level, select user(s) who will review orders and enable level.

1 Workflow Detail 2 Approver List

Add approvers to enable level(s)

Level 1
Add Approvers to Enable Optional
Add Approvers

Level 2
Add Approvers to Enable Optional
Add Approvers

Level 3
Add Approvers to Enable Optional
Add Approvers

Back Cancel Save

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.

Level Workflow
For each level, select user(s) who will review orders and enable level.

1 Workflow Detail 2 Approver List

Add Level 1 Approvers Level Enabled

Available Users
Anxster Admin
Helen Anxster-Blackbox
Nex Achijaj
Angela Baker
Gary Baker
Helen Baker Hughes
Mouad Bilal
Nate Butler
David Call
Patrick Callin

Add »
« Remove
« Remove All

Approver List
Helen Approver
Helen Test User

Cancel Done

Level Workflow
For each level, select user(s) who will review orders and enable level.

1 Workflow Detail 2 Approver List

Add approvers to enable level(s)

Level 1
Level Enabled Approvers Set
Edit Approvers

Level 2
Add Approvers to Enable Optional
Add Approvers

Level 3
Add Approvers to Enable Optional
Add Approvers

Back Cancel Save



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Threshold Workflow

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**.

Threshold Workflow

Orders with a subtotal at or above the threshold amount require approval.

1 Workflow Detail 2 Approver List

Workflow Name: Orders over £100 Threshold Amount *: £ 100.00

Threshold Workflow

Orders with a subtotal at or above the threshold amount require approval.

1 Workflow Detail 2 Approver List

Available Users: helen Anixter-Blackbox, Helen Approver, Nex Avhijaj, Angela Baker, Gary Baker, Helen Baker Hughes, Mouad Bilal, Nate Butler, David Call, Patrik Callin

Approver List: Anixter Admin

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

Approval Workflows

Manager Approval EDIT OFF ON

A Levels Workflow can be the first workflow requiring up to three levels of approval before Threshold Workflow approvals, or the last workflow requiring up to three levels of approval after Threshold Workflow approvals.

Level 1: Approvers: Helen Approver, Helen Demo Admin

Level 2: Approvers

Level 3: Approvers

+ Add Threshold Workflow

Orders over £100 (£100.00) EDIT OFF ON

Description: Orders above £100.00 require approval before submission.

Approvers: Helen Approver

Orders over £5000 (£5,000.00) EDIT OFF ON

Description: Orders above £5,000.00 require approval before submission.

Approvers: Helen Espinosa-Brown



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Approval Process

- 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.

MY ACCOUNT
Personal Info
My Accounts
Change Password
Shipping Addresses
Contract Items

ORDERS
Order Approvals
Recent Orders
My Quotes

BILLING
Billing History
Open Invoices
Tax Exemption

SAVED LISTS
Create a New List
View All Lists

Order Approvals

Orders pending approval. Click the order to approve or reject.

Account: 103338: EMEA Demo Act

Sort By: Order Created | Search By: Status | Search For: Pending Approval

Reset

1-1 of 1

Order Created	eOrder No.	PO No.	Status	Placed By
13/04/2023	07688990W	1234	Pending Approval	Helen Espinosa-Brown

- 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.

Approver Comments

- 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.

Home > My Account > Recent Orders > Order History Details

For returns contact us. Print

eOrder Number 07688990W

Pending Approval: This order is awaiting approval from Workflow: Manager Approval (level 1)

Order Date	Order Status	Channel	PO No.	eOrder Number	Customer Number
13/04/2023	Pending Approval	Web	1234	07688990W	103338