

Credit Approval

Last Modified on 10/31/2024 3:13 pm EDT

The credit approval process starts by creating a credit approval rule. This process continues with the creation of a credit that meets a credit approval rule. This includes any method for creating a credit, including the one-click credits created by clicking the Credit button on an invoice. After saving a credit that meets one of the rules, Managely flags the credit as needing approval, which does the following with the credit:

1. Sends an email to the approvers notifying them that a credit has been entered in the approval queue to be approved.
2. Only users that can approve a credit can open the credit after it has entered the approval process.
3. The credit, before approval, cannot be applied to an invoice or sent to the customer.
4. Approvers opening the credit have an extra button available to them at the top right of the credit page allowing them to approve or decline the credit.

When approvers open the credit that has entered the approval queue, they can view and edit the credit as normal but cannot apply or send the credit before approving or denying the credit.

If the credit is approved, Managely removes all the associated approval restrictions made on that credit and flags the credit as approved, which means it will no longer enter the approval queue for that approval rule. If the credit is subsequently edited and meets a different approval rule, the credit must go through the approval process for that rule.

If the credit is denied, there is a prompt for approvers to enter a reason. After denying the credit, it will remain but will not be flagged. Managely sends an email to the creator of the credit request with the reason the credit was denied.
