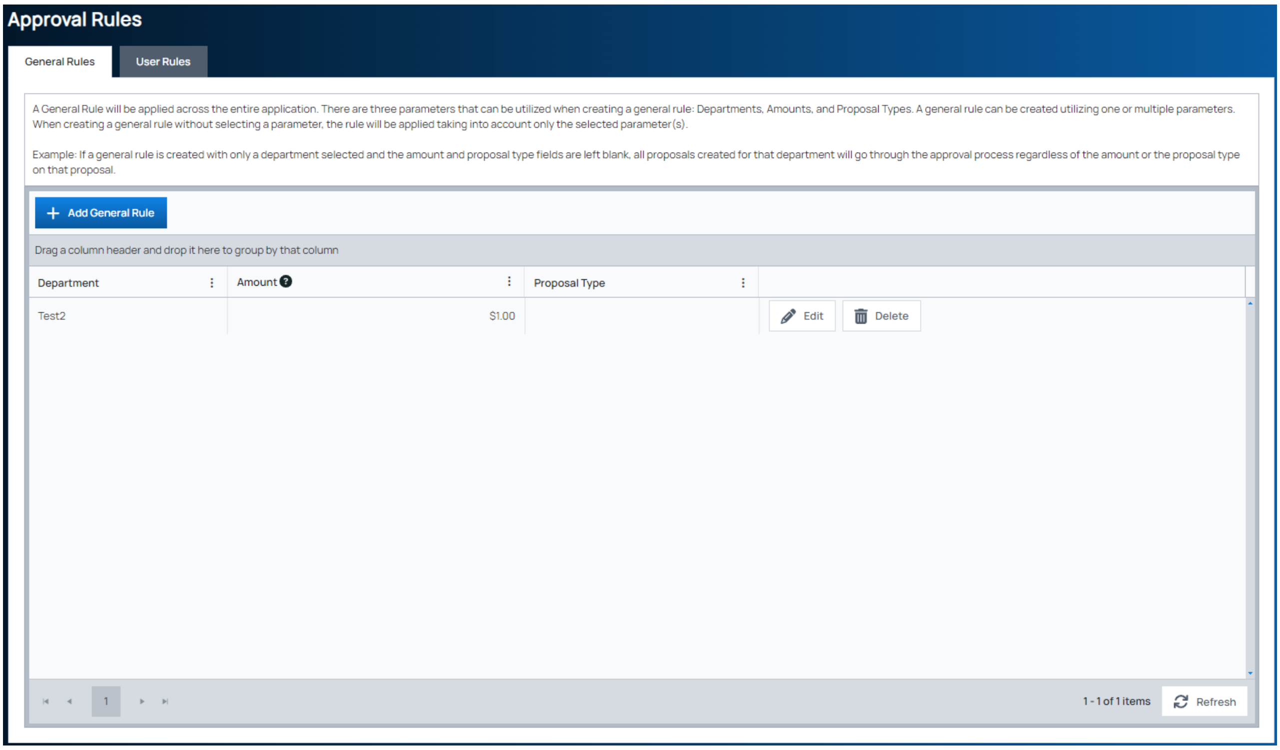
Approval Rules

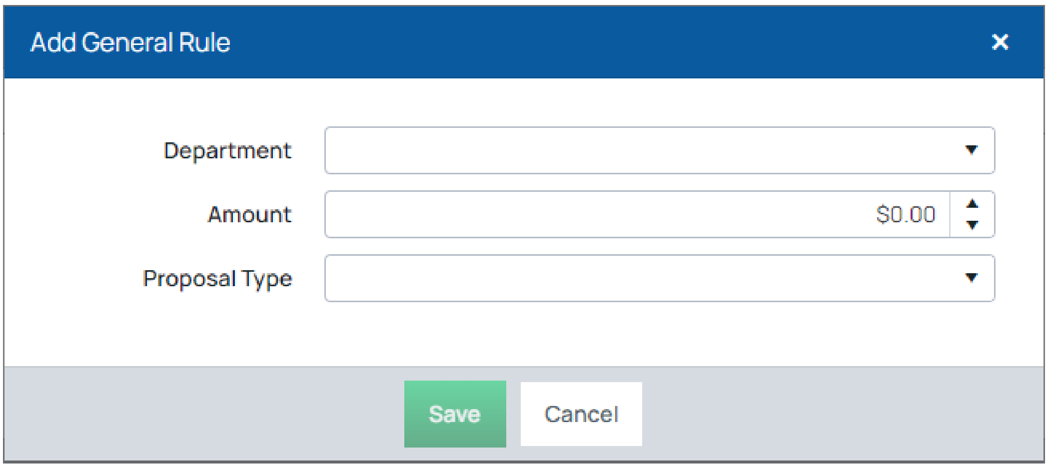
Last Modified on 11/01/2024 4:31 pm EDT

Use the Approval Rules page (Setup > Proposals > Approval Rules) to define and maintain roles for approving proposals. There are two types of approval roles: general rules and user rules. General rules apply to all users company wide. User rules apply to specific users.



General Rules

Click the Add General Rule button to open the Add General Rule form.



Select any combination of parameters for the rule:

NOTE: If you select two parameters, then both must be met for a proposal to follow the rule; if you select three, then all three must be met for a proposal to follow the rule.

Department: Any proposal created for this department will go through the approval process. These come from

CRM > Departments.

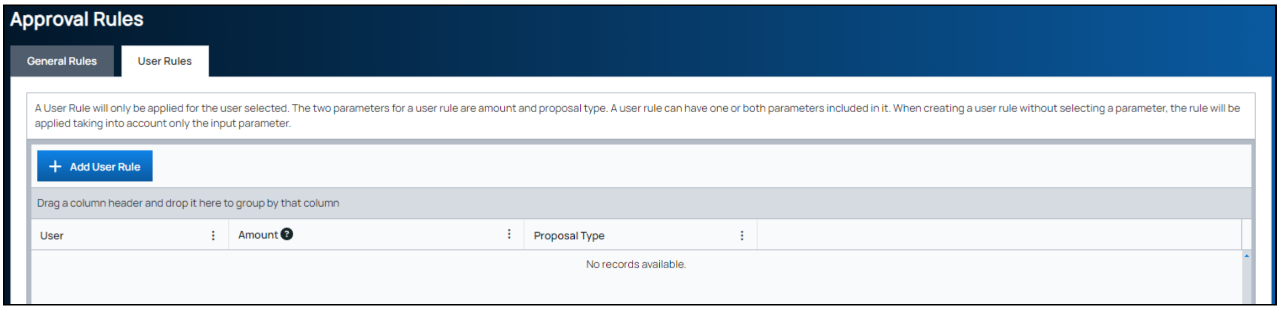
Amount: Any proposal created that is more than this amount will go through the approval process.

Proposal Type: Any proposal with this type will go through the approval process. (Proposal types are defined on the Proposal Types page (Setup > Proposals > Proposal Types), and the proposal type is selected on the proposal.)

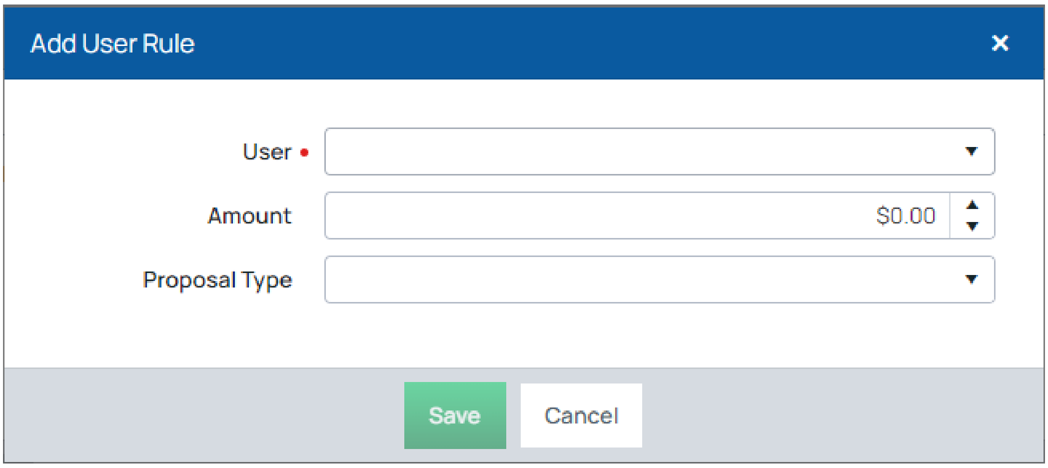
When finished, click Save.

User Rules

Click the User Rules tab.



Click the **Add User Rule** button to open the Add User Rule form.



Select any combination of parameters for the rule:

NOTE: If you select two parameters, then both must be met for a proposal to follow the rule; if you select three, then all three must be met for a proposal to follow the rule.

User: Any proposal created for this user will go through the approval process; these are uses with the salesperson role.

Amount: Any proposal created that is more than this amount will go through the approval process.

Proposal Type: Any proposal with this type will go through the approval process. (Proposal types are defined on the Proposal Types page (Setup > Proposals > Proposal Types), and the proposal type is selected on the proposal.)

When finished, click **Save**.