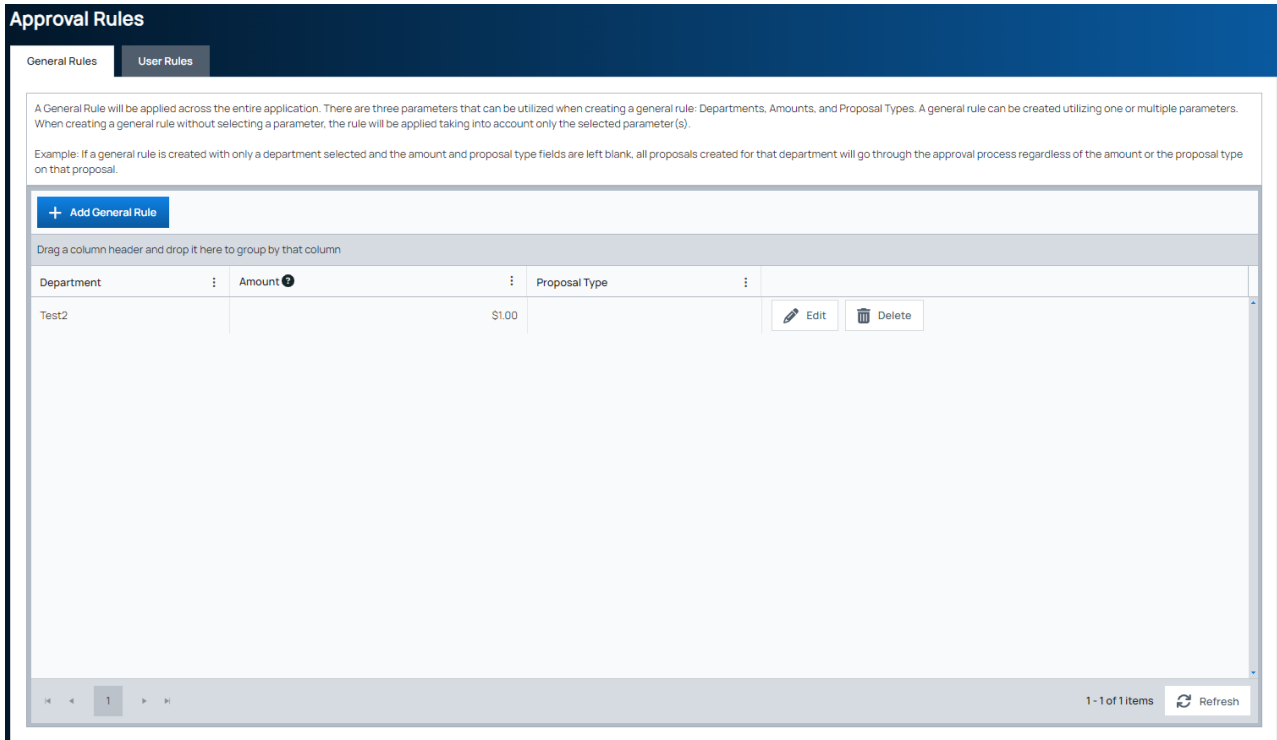


Approval Rules

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

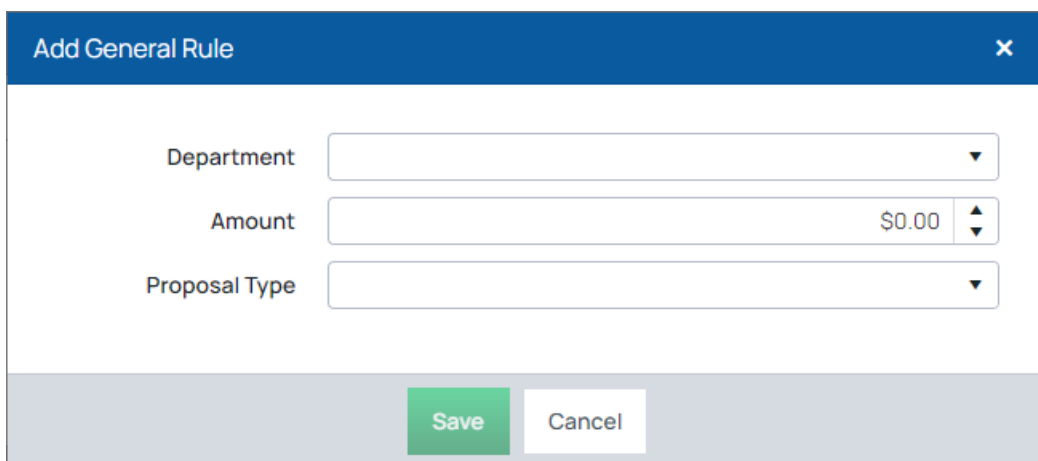
Use the Approval Rules page (Setup > Proposals > Approval Rules) to define and maintain roles for approving proposals. There are two types of approval roles: general rules and user rules. General rules apply to all users company wide. User rules apply to specific users.



The screenshot shows the 'Approval Rules' interface. At the top, there are tabs for 'General Rules' and 'User Rules'. Below the tabs, there is a text box explaining that a General Rule is applied across the entire application and lists parameters: Departments, Amounts, and Proposal Types. An example is provided: 'If a general rule is created with only a department selected and the amount and proposal type fields are left blank, all proposals created for that department will go through the approval process regardless of the amount or the proposal type on that proposal.' Below this is a '+ Add General Rule' button. Underneath is a table with the instruction 'Drag a column header and drop it here to group by that column'. The table has three columns: 'Department', 'Amount', and 'Proposal Type'. A single row is visible with 'Test2' in the Department column and '\$1.00' in the Amount column. To the right of the row are 'Edit' and 'Delete' buttons. At the bottom right of the table area, it says '1 - 1 of 1 Items' and a 'Refresh' button.

General Rules

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



The screenshot shows the 'Add General Rule' form. It has a blue header with the title 'Add General Rule' and a close button (X). The form contains three input fields: 'Department' (a dropdown menu), 'Amount' (a text input with a value of '\$0.00' and up/down arrows), and 'Proposal Type' (a dropdown menu). At the bottom of the form, there are two buttons: 'Save' (green) and 'Cancel' (white).

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.

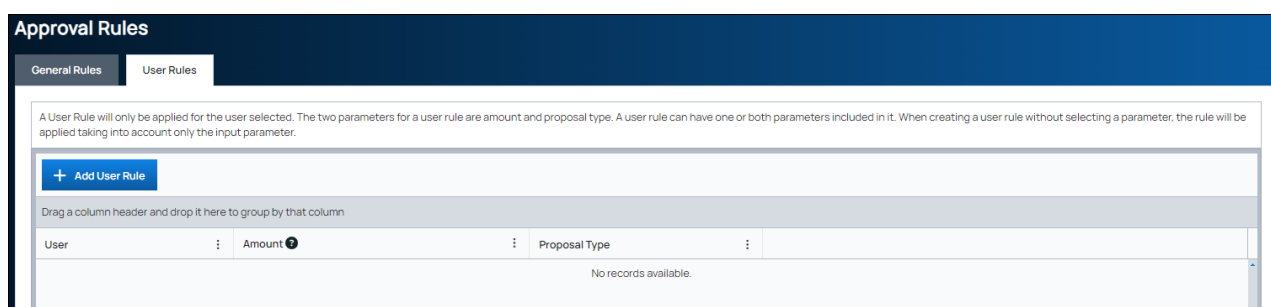
Amount: Any proposal created that is more than this amount will go through the approval process.

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.

The screenshot shows the 'Add User Rule' form. It has a blue header with the title 'Add User Rule' and a close button. The form contains three input fields: 'User' (a dropdown menu), 'Amount' (a text input with a '\$0.00' value and up/down arrows), and 'Proposal Type' (a dropdown menu). At the bottom of the form are two buttons: 'Save' (green) and 'Cancel' (white).

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 users 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**.

