Approval Tool
User Guide

v1.0

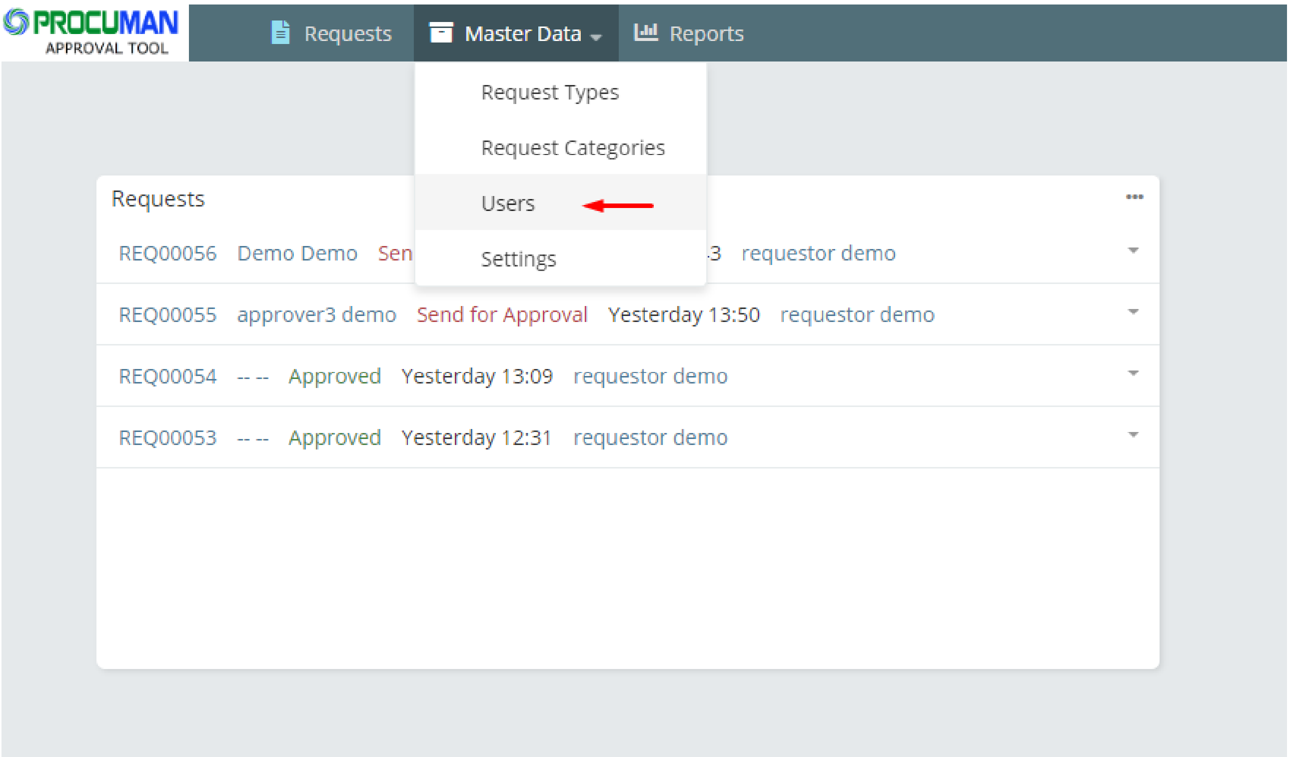
1. Procuman Approval Tool Software

Procuman Approval Tool Software is based on open source EspoCRM platform and it has been configured to support wide range of Approval processes. Set of predefined workflow processes can be activated for a company and deployed in their organization. Notification emails are automatically send from the system for user to take action or notify for approval, purchase or payments.

EspoCRM provides a flexible platform with possibility for unlimited customisations with Procuman's Corporate level hosted software service. With no-code developer tool users are able to add new fields or even create completely new forms and reports without the need for programming.

2. User Creation

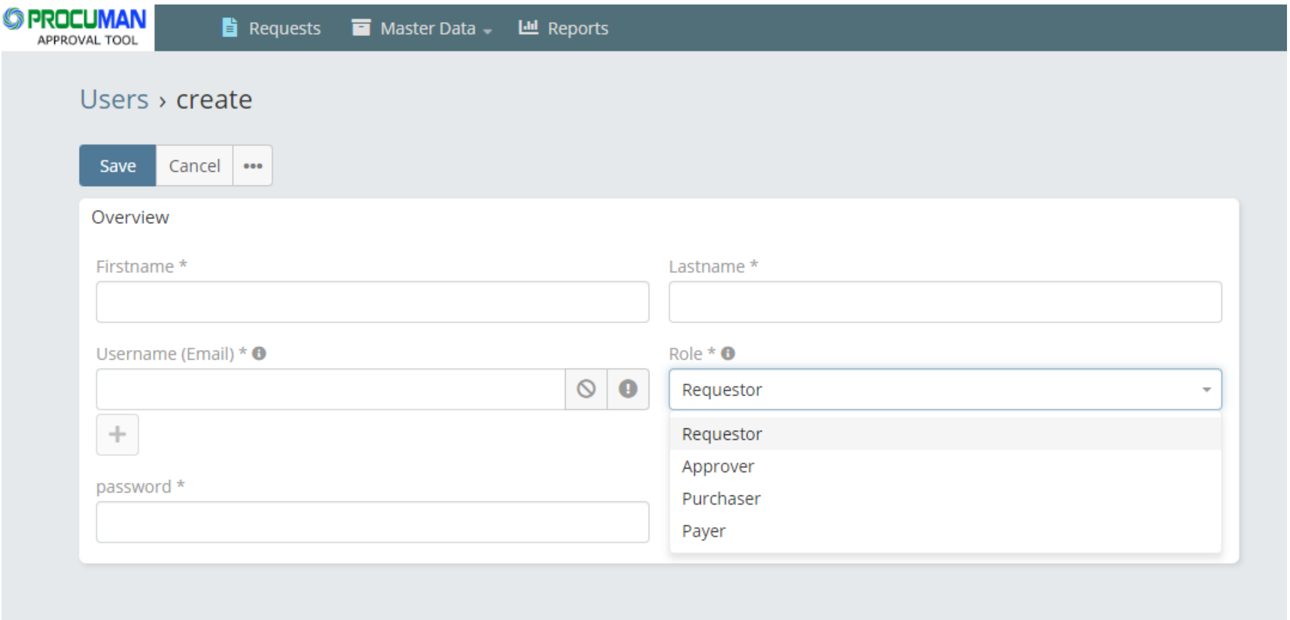
System administrator can create new users at menu item Master Data -> Users -> Create Users.



User's Email address will be taken as user's login name.

Roles:

- Requestor can only create and view own Requests
- Approver can create and approve Requests
- Purchaser can create and approve Requests and create Purchase records
- Payer can create and approve Requests and create Payment records
- Note: system administrator user cannot create new Requests but can edit existing records, view audit log (stream), add record watchers and run reports.



3. Creating Requests

New Requests are created at menu Requests -> Create Request

Field explanations:
Request Number: Auto generated Request number, not a company specific sequence but global.
Assigned approver / Editor: This user is notified for the assignment and this user has edit rights for the record. User can assign record to himself (default value) to keep the record as draft. After final approval assigned approver will be set to NO-EDIT user, no-one can edit the record anymore.
Approval Status:

New – Record is being created
Draft – Not yet sent for approval
Sent for Approval – Record assigned to approving manager. Notification is sent out.
Approved – Final approval has been done. Notification is sent out to all watchers.

Needs Change – Request has been declined and assigned back to the user that created the record. User will receive notification for declined requests.

Request Type: Request types are defined and maintained in Master Data -> Request Types and they can be linked to a specific processes:

Approval Only: This request type will not notify Payer nor Purchases for approved requests

Finance and Payments: This request type will notify Payers for Request approval

Procurement and Purchase: This request type will notify Purchasers for Request approval

Notification receivers can be maintained in Master Data - > Settings.

Request Category: Categories are freely definable values (Master Data->Request Category) and can be used for various company specific values. For example, Project codes, Cost Center codes, etc.

Request Title: Single line text of the request subject

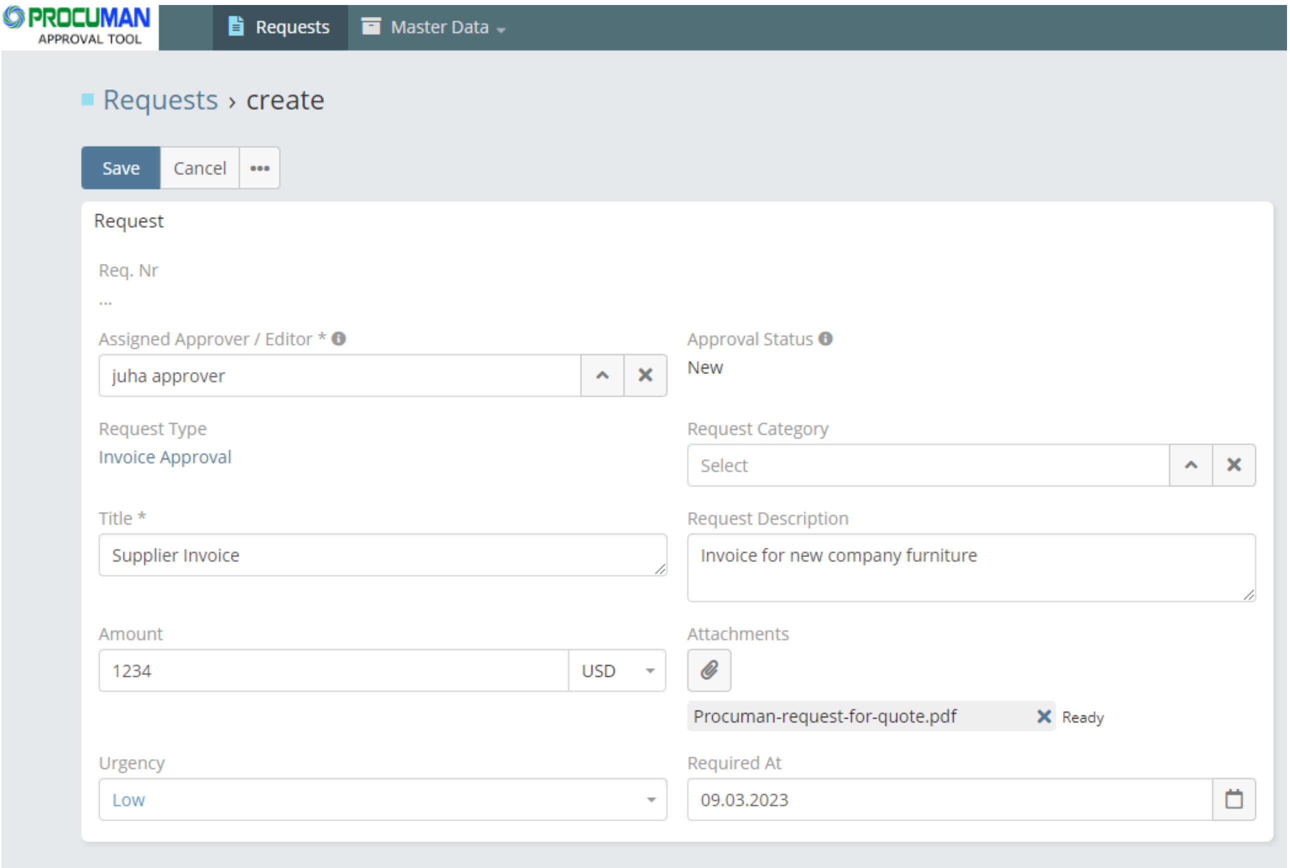
Request Description: Multi line text to describe the request in detail

Amount: Monetary value of the request

Attachments: File attachments related to the request

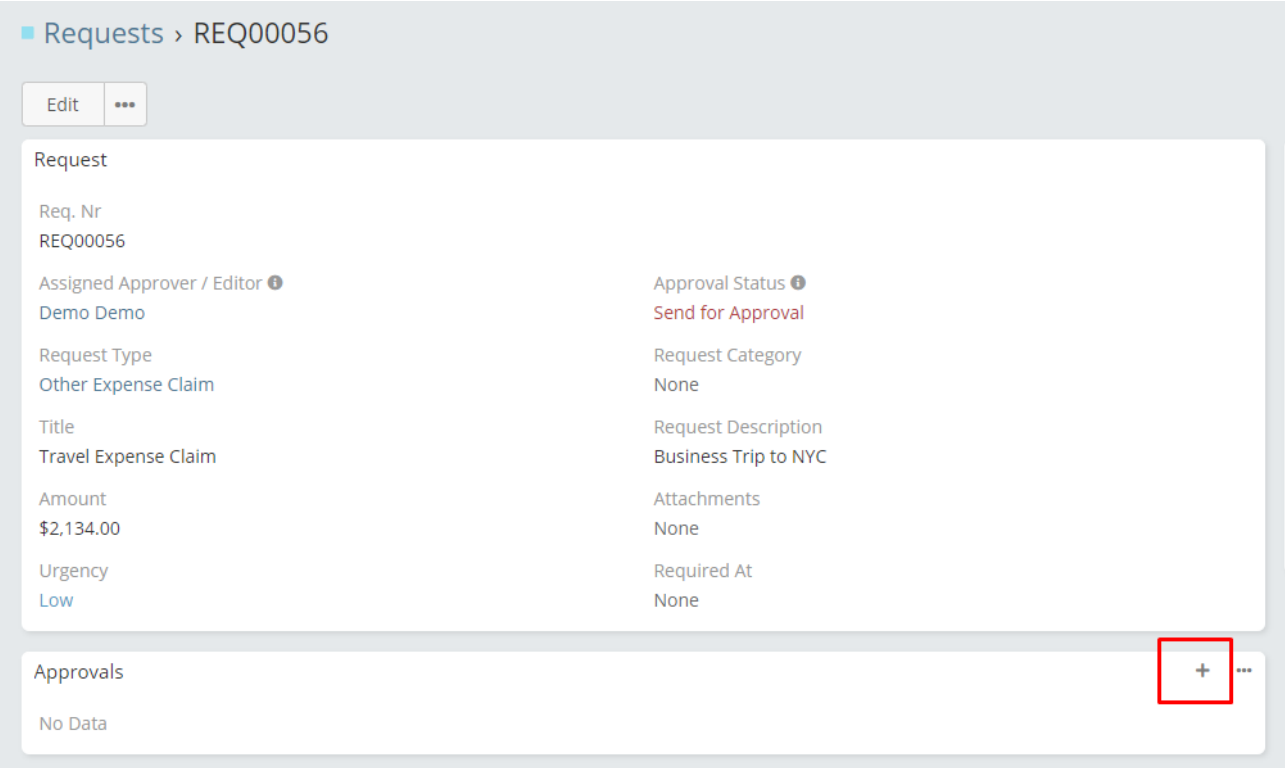
Urgency: Priority for the request

Required At: Date by when the request approval must be done



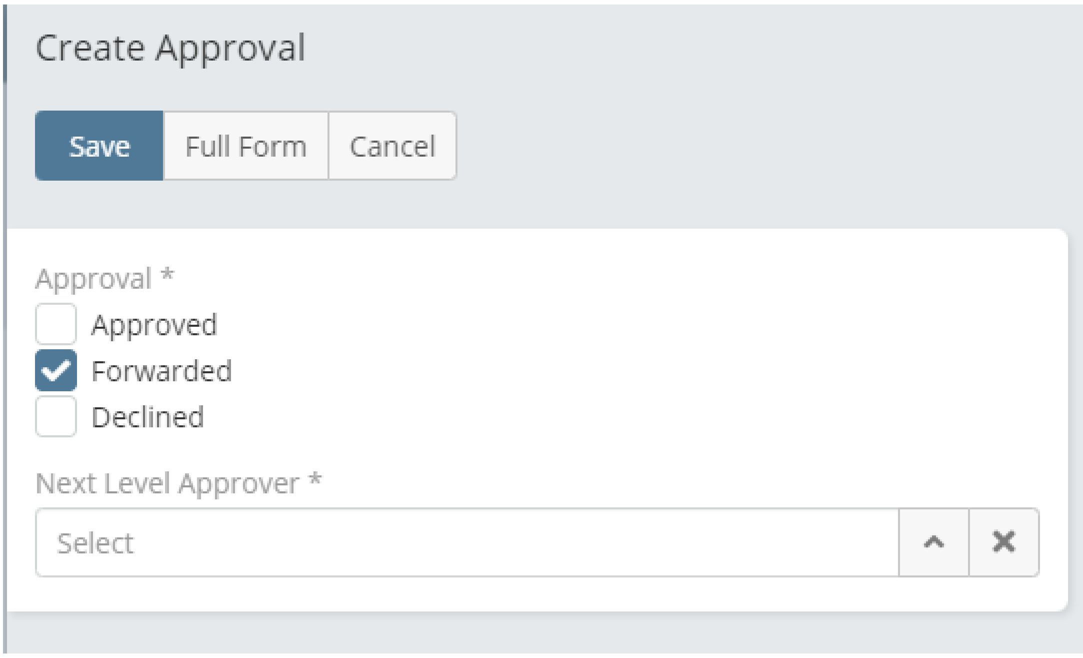
4. Approving Requests

User that has approver role and is the assigned approver for a request can create a new entry at the Approvals subpanel by pressing the "+" - sign at the panel right upper corner.



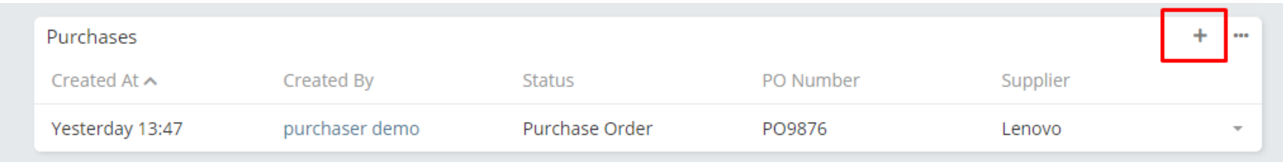
Options in Approval are:
Approved – Final approval for a request
Forwarded – Request forwarded to next level approver
Declined – Request forwarded back to original creator (request status: Need change). In Notes subpanel it is possible to enter more information about the reason for the decline action.

If final approval is not entered within 3 days of the request creation, the approving manager will receive a reminder notification. Reminder is sent for 3 times.

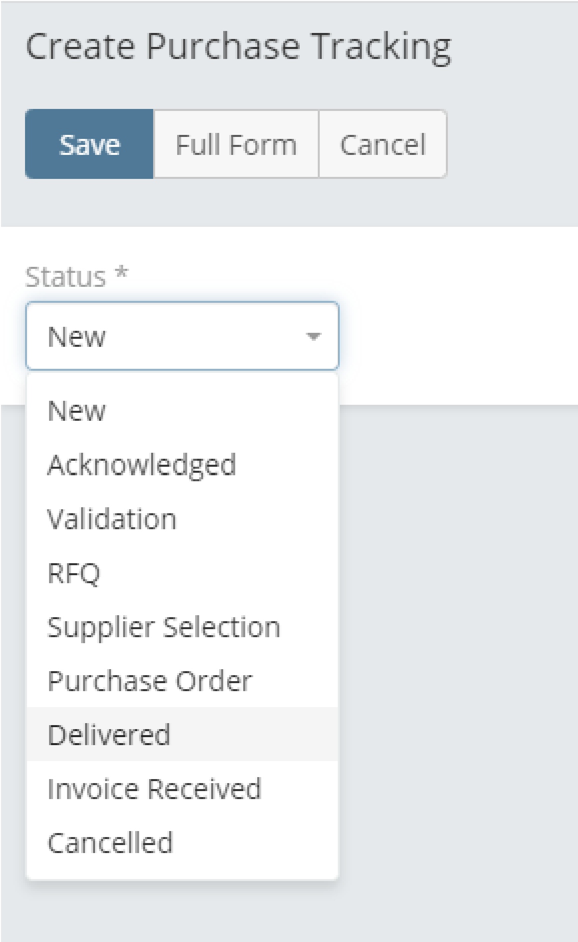


5. Purchase Tracking

In the Purchases-subpanel, a user with Purchaser role can enter purchase status and tracking information. Purchasers will receive notification of approved request if the request type is attached to “Procurement and Purchase” process.

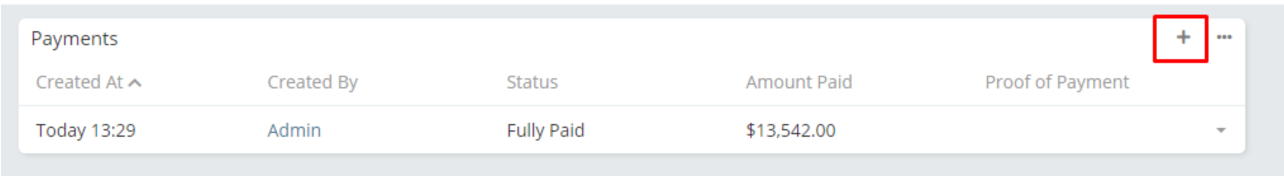


Once request is approved, the Purchase Status will change to “Waiting for Purchase”. Status will change to “Purchased” once the purchase tracking status has been entered as “Purchase Order”.

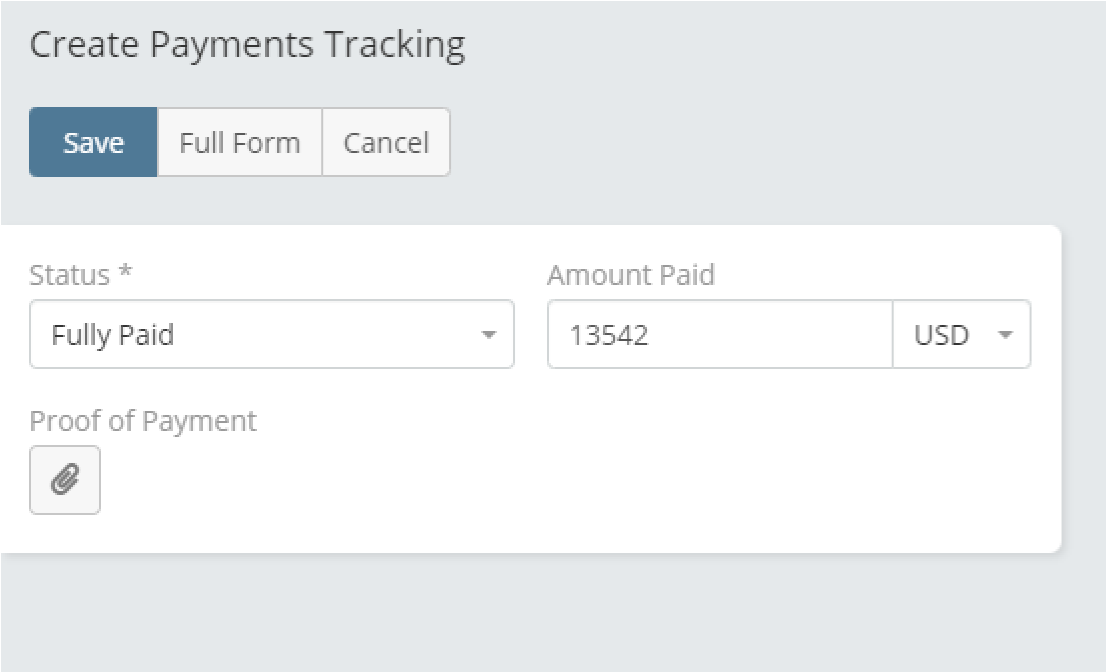


6. Payment Tracking

In the Payments subpanel, user with Payer role can enter payment status information. Payer will receive notification of approved request if the request type is attached to “Finance and Payments” process.



Once request is approved, the Payment Status will change to “Waiting for Payment”. Request payment status will change to “Fully Paid” once full payment is entered in Payments subpanel. Proof of payment document can be attached to the Payments record.


Create Payments Tracking
Save
Full Form
Cancel
Status *
Fully Paid
Amount Paid
13542
USD
Proof of Payment