SAP Business One Approval Process

SAP Business One offers a simple and streamlined approval process that can be implemented in the case that your company needs to set up approvals whenever a work procedure requires one ore more resources to overlook and approve a process.

For example, if or when approvals are needed when generating certain documents such as a purchase order. The user creating the document may enter a value that exceeds a certain limit. The approval procedure can be set to block the document until it is reviewed and approved.

Setup Process

1. To set up the approval process you will need to enable the 'Approval Process'. Navigate to Administration → System Initialization → General Settings → BP tab
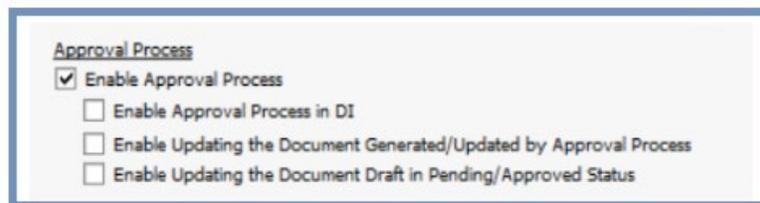
2. Next, you will need to create an Approval Stage. This is where you will create a list of users who can approve a document in that particular stage. If more than one user is listed in each stage, the system will enable any of those on the list, to be the approver. You can create as many stages as needed. Navigate to Administration → Approval Process → Approval Stages

   Note: All approvers must be a user within the database.

3. Finally, you will need to create an Approval Template. This is where you will need to list the users (also known as the Originator) and the stages (in which you created in the step before this) linked to this specific approval process.

   Note: The terms tab allows you to specify when this approval process kicks in – "always" or "when the following applies"
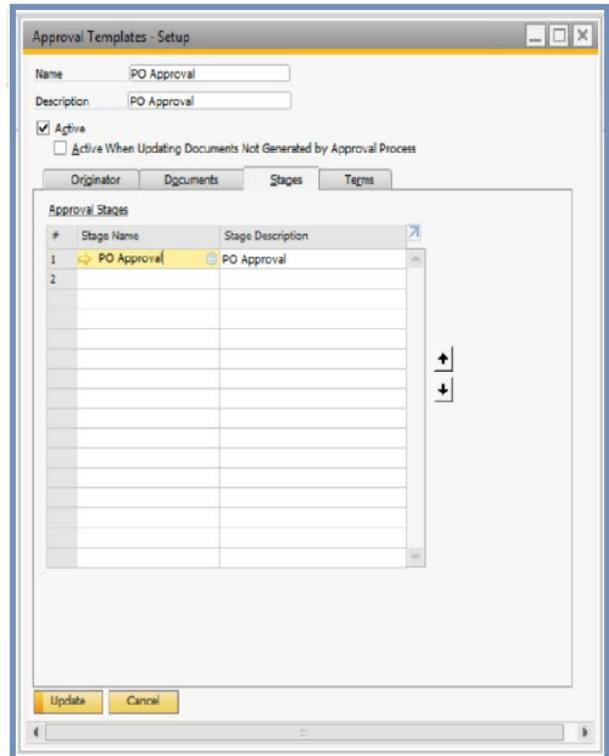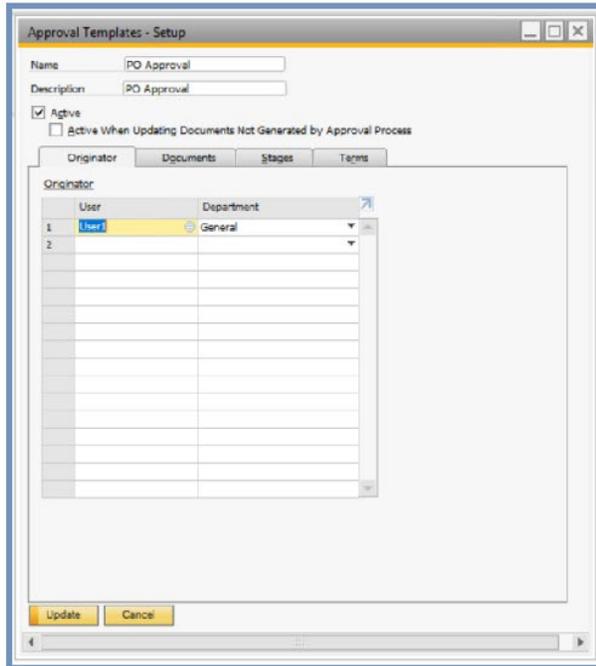
How the process works:

1. The originator will create the document.
2. Once the originator adds the document, the system will know to validate if there are any approval conditions set in place.
3. If the document requires an approval, the originator will be notified.
4. Any document that requires an approval will only be able to be saved as a draft.
5. The approver will receive a message alert notifying him/ her that a document is awaiting his/ her approval.
6. The approver will need to open the document and either provide or deny approval.
   a. If the approver approves, the originator will receive a message alert notifying him/ her of the approval. At this point, the originator may now add the document.
   b. If the approver does not approve, he/ she may leave a note within the document letting the originator know the reason for denying approval. At this point, the originator will receive a message alert notifying him/ her of the rejection and will need to make the necessary changes. Once the changes have been made, the process of going through the approvers repeats until approval is given.

Note: In SAP Business One 10.0, enhancements have been made to the approval process. Approvers are now able to make the necessary updates to documents made by the originator. This enhancement eliminates the process of having the denied document sent back to the originator who would be required to make the necessary updates and to send the document back through the approval rounds.