

# Limit Permission to Approve Records and Alert Approver

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## Limit Permission to Approve

The first thing you want to do is set the permissions for the Role for the User that WILL NOT have permission to change the Status to Approved.

To do this go to Admin > Roles > click the Edit icon for the Role

Now you need to click Add Exception to the right of the record type that you want to control the Status change on.

Admin > Roles > Role

Role-SalesClone Save Reset

Name: SalesClone

Description: A custom Role cloned from Sales

Active

Role can manage profile lists

Role can edit activity history

Role can edit default doc number

Can manage accounting integration

Can manage EDI/Ecommerce integrations

Can allocate inventory to Sales Orders

PO Limit:

General Sales **Purchasing** Production Warehouse IP Restrictions Time Of Day Restrictions

TYPE	VIEW	CREATE	EDIT	PRINT/EXPORT	DELETE	ACTIONS
Receiver	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add Exception
Receiver Line	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add Exception
Purchase Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add Exception
+ Exceptions						
Is Approved	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Remove
Purchase Order Line	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add Exception
Vendor Return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add Exception
Vendor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add Exception
Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add Exception
Reorder Analysis	<input checked="" type="checkbox"/>	Add Exception				

## Create a Custom Document Status

Now create a custom Document Status

Go to Admin > Doc Status and click the Document type on the left

Here you can type into the empty row and create the custom Document Status. I have named it Awaiting Approval.

For this example, the Type in the middle column will be Processing

Make sure to click on true in the Active column to confirm that this status is active.

Admin > Doc Status

### Document Status

- Sales Order
- Quote
- Ship Doc
- Customer Return
- Purchase Order**
- Receiver
- Vendor Return
- Work Order
- Disassembly
- Transfer
- Adjustment
- Count
- Value Adjustment
- Repair Order

Name	Type	Active	Actions
Processing	Processing	true	
Approved	Approved	true	
Sent	Sent	true	
Voided	Voided or Not Processed	true	
Closed	Closed	true	
Awaiting Approval	Processing	true	✖

## Create the Alert

Now you can create the Alert for the User who will change the Status to Approve.

This will be a Task type Alert and the User will be notified via email that a new Task was assigned to them

Admin > Alerts > Alert

### Alert

Save Reset

Name: PO Awaiting Approval

Active:

Description:

Type: Purchase Order

Run after: Change Status

Status: Awaiting Approval

Activity Type: Task

Assignee Type: User

User: Edward McDowell

Days to add: 0

Alarm: 5 Minutes

## Test the New Alert

Now you can have the User who DOES NOT HAVE permission to Approve login and create a Purchase Order (or other record type) and change the Status to the new custom Status, Awaiting Approval.

Purchasing > Purchase Orders > Purchase Order

Created By Joe Salesman 7/26/2022 10:05 AM Modified By Joe Salesman 7/26/2022 10:07 AM

### Purchase Order - 10013892

EDIT Create PDF Export Status: Awaiting Approval

General

No. 10013892  
 Vendor: PC Cases R US Change  
 Date: 7/26/2022  
 Promise Date: 7/26/2022  
 Customer Account #

Bill Address map

PC CASES R US  
 123 MAIN ST.  
 ST. AUGUSTINE, FL 32086

Ship Address map

EDWARDS PCS  
 456 BROAD ST.  
 ST. AUGUSTINE, FL  
 US

Drop Ship Address

Drop Ship

Summary Revision: 1

Total Amount: 63.00

Items Details Memo & Internal Notes Custom Dependency Receivers Attachments Open Activities Activity History

Name/Number Search Item  Scan

ITEM	DESCRIPTION	QUANTITY	UOM	COST	EXT.	ACTIONS
PC2000	POWER SUPPLY - 350 WATT	1.00	EA	27.00	27.00	<input type="checkbox"/> <input type="checkbox"/>
PC2001	POWER SUPPLY - 450 WATT	1.00	EA	18.00	18.00	<input type="checkbox"/> <input type="checkbox"/>
PC2002	POWER SUPPLY - 550 WATT	1.00	EA	18.00	18.00	<input type="checkbox"/> <input type="checkbox"/>

When the Status is changed to Awaiting Approval, the Alert will be triggered and create a Task for the User who will Approve the Purchase Order. The new Task will trigger a notification email to that User that will be similar to the picture below.

