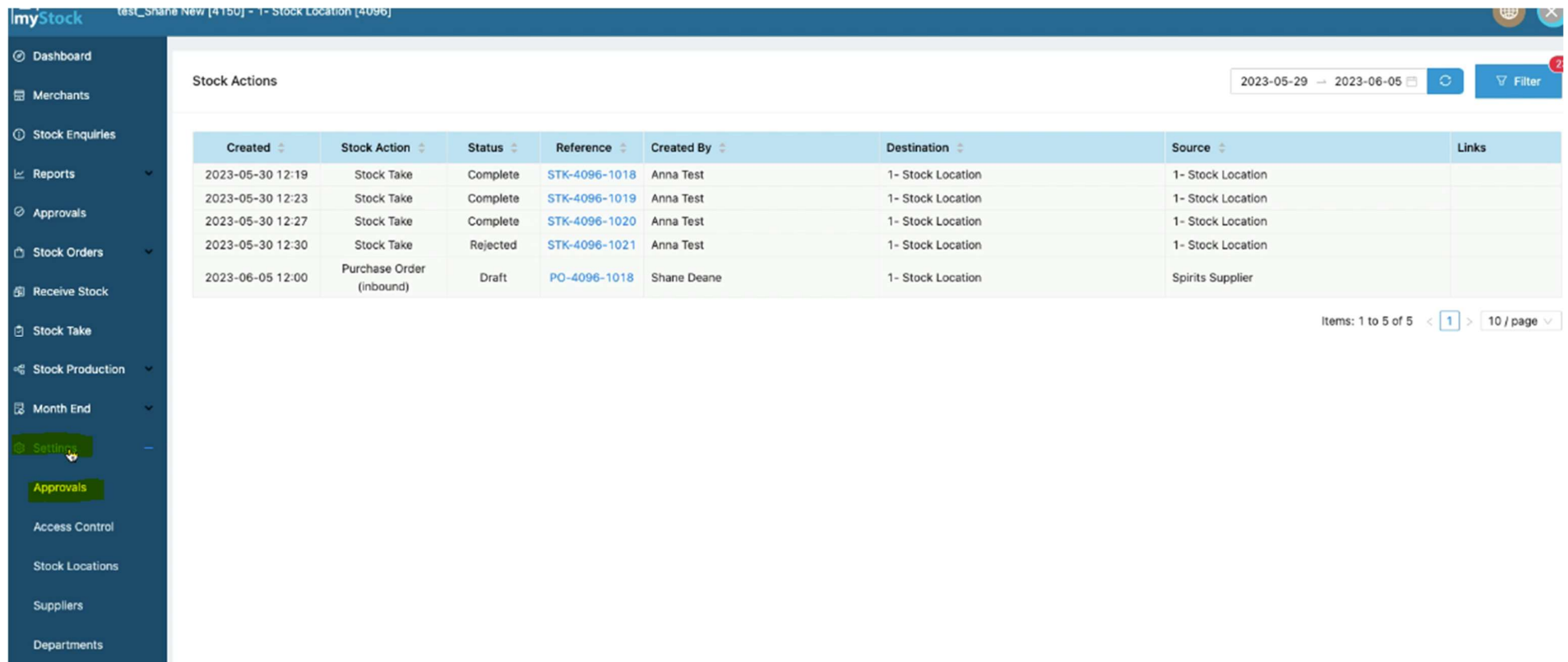## TALLORDER SOLUTIONS
APPROVALS

TallOrder / Approvals Manual

The TallOrder Approvals feature allows users to view and approve stock actions that require authorization before they can be executed. This feature is especially useful when a second level of approval is necessary to manage inconsistencies in quantities, costs, unit pricing, and other factors that the approvers may need to review and potentially modify before finalizing the action.

Setting up Approvals:

1. Access your settings.
2. Click on "Approvals."

- You will be directed to the approval settings page.
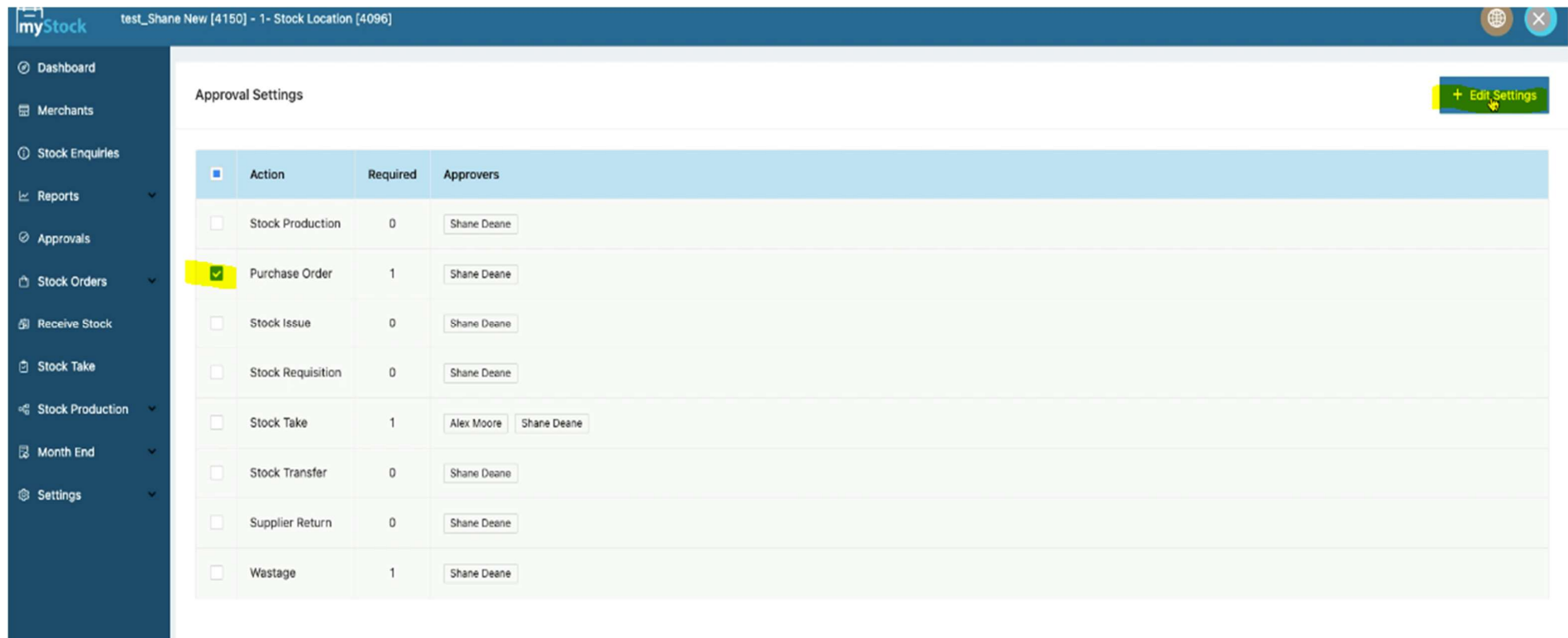
- On the left side, you will find a list of actions that can require approvals.
- Each action displays the number of staff members required for approval.
- It also indicates which staff members are available or have the authority to approve.

To set up approvals:

- Select the checkbox on the left of the desired stock action.
- Click on the "Edit Settings" tab located in the top right corner.

- The staff members eligible for approval will include the business owner, inventory admins, and inventory managers.

- Note: The inventory clerk does not have approval authorization.
- Choose either "My Admin" or "My Manager" to grant approval privileges.

- If you select "two" as the required number of approvers, it means that this particular action will need approval from two staff members.

- On the right side, you have two options: "Edit" and "Approve."

- Use the "Can Approve" button (red to green) if you want the staff member to only approve the action.
- Use the "Can Edit" button (red to green) if you want the staff member to only modify the action before it is placed.

- Click "Close" to finalize the approval settings.

- The selected staff member now has access to approve or edit the specific action.

Edit Approval Setting   ⊗ ✕

Required

| 1 |

| Filter |

Name	Can Edit	
Alex Moore	⬚	✓
Sarah Buys	⬚	⊘
Shane Deane	⬚	✓

< **1** >

Close

Approving a Purchase Order:

1. Go to "Stock Orders."
2. Select "Purchase Orders."

• Check if there is a draft purchase order under the "Draft" section.

- Open the draft purchase order by clicking on it.

- Ensure that the details in the draft purchase order are correct.

- Click on "Place Purchase Order" to proceed.

- The order will move to the "Awaiting Approval" state.

PO-4096-1018: 2023-06-05 to   Spirits Supplier ⌄ to 1- Stock Location   ✕

Name: Liquor - Beers and Rum

Expected Date: 2023-06-05

Supplier Tax Reference: SpiritRef   + Add Items From Pending PO List   +

⬤ Manual Receive   ⬤ Unit prices excluding tax

Currency: South African rand   * Tax Inclusive

Draft

	Item		Unit	Qty	Unit Price	Extended*	Includes Taxes	
☐	Beers Black Label		Each	10	32.50	373.75	48.75	🗑
☐	Beers Castle-Light		Each	10	32.50	373.75	48.75	🗑
☐	Beers Windhoek		Each	10	33.33	383.33	50.00	🗑
☐	Rum Bacardi		Tot	10	10.00	115.00	15.00	🗑
☐	Rum Captain Morgan		Tot	10	10.00	115.00	15.00	🗑
☐	Rum Red Heart		Tot	10	10.00	115.00	15.00	🗑

Total Excluding Tax	1 283.33
Taxes	192.50
Total Value	1 475.83

< 1 >

Creator: Shane Deane

🗑 Delete   + Notes   🖶 Print   📄 Save Template   ⊘ Place Purchase Order

- At this stage, either of the two staff members designated as approvers must approve the purchase order.
- To access the purchase order awaiting approval:
- Select "Go Approve" or close the order, and it will appear under the "Awaiting Approval" status.

PO-4096-1018: 2023-06-05 to   Spirits Supplier ∨   to 1- Stock Location   ⊗ x

Name: Liquor - Beers and Rum

Expected Date: 2023-06-05   📅

Supplier Tax Reference: SpiritRef   [+ Add Items From Pending PO List] [+]

( ) Manual Receive   ( ) Unit prices excluding tax

Currency: South African rand   * Tax Inclusive

Awaiting Approval

Item			Unit	Qty	Unit Price	Extended*	Includes Taxes	
Beers	Black Label		Each	10	32.50	373.75	48.75	🗑
Beers	Castle-Light		Each	10	32.50	373.75	48.75	🗑
Beers	Windhoek		Each	10	33.33	383.33	50.00	🗑
Rum	Bacardi		Tot	10	10.00	115.00	15.00	🗑
Rum	Captain Morgan		Tot	10	10.00	115.00	15.00	🗑
Rum	Red Heart		Tot	10	10.00	115.00	15.00	🗑

Total Excluding Tax	1 283.33
Taxes	192.50
Total Value	1 475.83

< [1] >

Creator: Shane Deane

Approvers: Shane Deane   Alex Moore

[🗑 Delete] [+ Notes] [🖨 Print] [⊘ Go Approve]

- Click on "Approvals."

- This page displays all types of stock actions that potentially require approval.

- Locate the specific purchase order and click on it.
- To make changes to the purchase order, click the "Edit" button.

- You can modify costs, extended total costs, quantities, or other relevant details.
- Click "Done" when you finish editing an item.

- Once you are satisfied with the changes, if any, click "Go Approve" to proceed with approval.

- To approve the Purchase Order, click the blue "Approve" button.

- If necessary, add any notes or comments related to the approval.

- Click "Approve" when you are finished.

PO-4096-1018: Spirits Supplier To 1- Stock Location

Currency: South African rand

Item	Unit	Qty	Unit Price	Extended*	Includes Taxes
Beers Black Label	Each	10	32.50	373.75	48.75
Beers Castle-Light	Each	10	32.50	373.75	48.75
Beers Windhoek	Each	10	33.33	383.33	50.00
Rum Bacardi	Tot	10	10.00	115.00	15.00
Rum Captain Morgan	Tot	10	10.00	115.00	15.00

Total Excluding Tax					1 283.33
Taxes					192.50
Total Value					1 475.83

Awaiting Approval

< 1 2 > 5 / page

Created: Shane Deane on 05-Jun-2023, placed on 05-Jun-2023

Approvers: Shane Deane   Alex Moore

✎ Edit   + Notes   🖶 Print   ✗ Reject   ⊘ Approve

Approve purchase order ✕

Are you sure you want to approve this purchase order?

Notes

[ ]

✕ Cancel   ⊘ Approve

- You will be redirected to the "Approvals" page, and the order will no longer be visible because it has been successfully placed.

Viewing Approved Purchase Orders:

1. Go to "Stock Orders."
2. Select "Purchase Orders."
3. You will see the approved Purchase Order along with the name of the approving staff member.
   o The order will now be in the "Placed"