

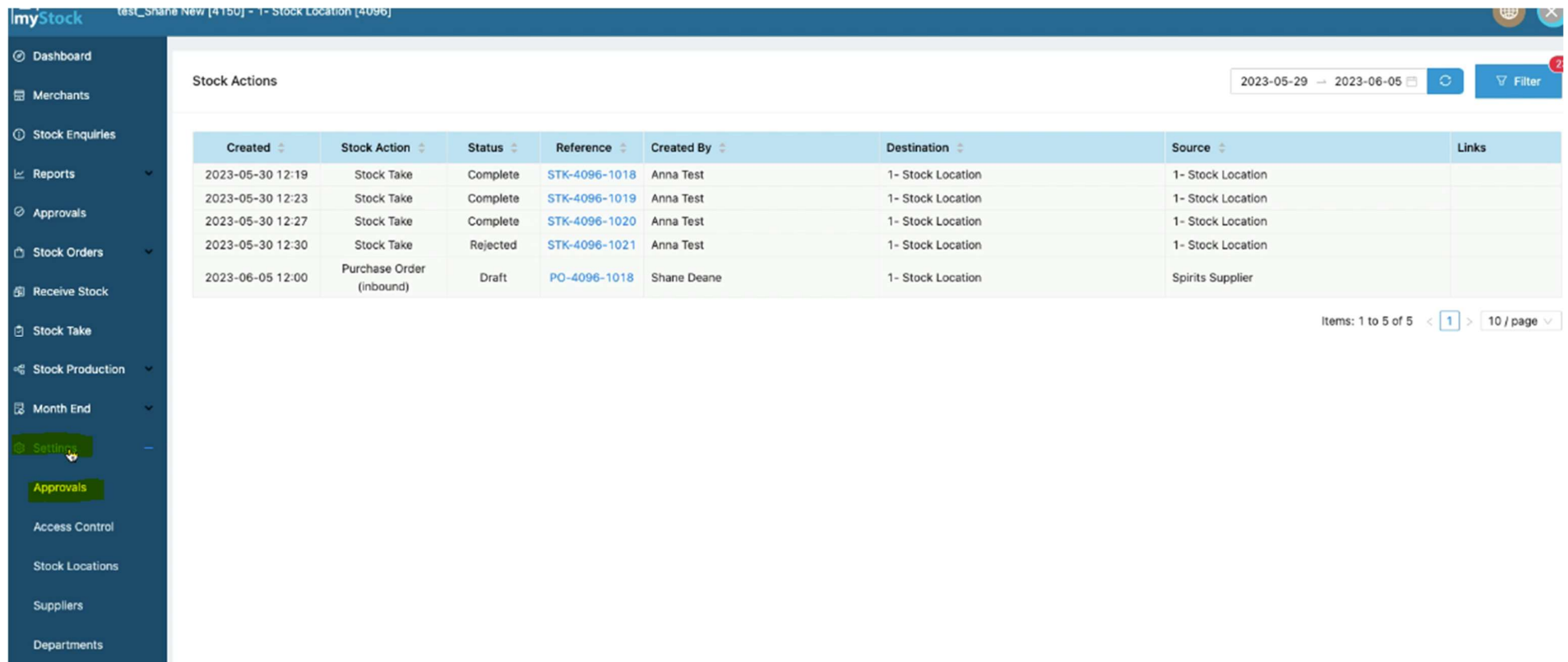
TALLORDER SOLUTIONS APPROVALS

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."



The screenshot shows the myStock application interface. The left sidebar menu is visible, with the 'Approvals' option highlighted. The main content area displays a table titled 'Stock Actions' with the following data:

Created	Stock Action	Status	Reference	Created By	Destination	Source	Links
2023-05-30 12:19	Stock Take	Complete	STK-4096-1018	Anna Test	1- Stock Location	1- Stock Location	
2023-05-30 12:23	Stock Take	Complete	STK-4096-1019	Anna Test	1- Stock Location	1- Stock Location	
2023-05-30 12:27	Stock Take	Complete	STK-4096-1020	Anna Test	1- Stock Location	1- Stock Location	
2023-05-30 12:30	Stock Take	Rejected	STK-4096-1021	Anna Test	1- Stock Location	1- Stock Location	
2023-06-05 12:00	Purchase Order (inbound)	Draft	PO-4096-1018	Shane Deane	1- Stock Location	Spirits Supplier	

At the bottom right of the table, it indicates 'Items: 1 to 5 of 5' and '10 / page'.

- You will be directed to the approval settings page.

myStock test_Shane New [4150] - 1- Stock Location [4096]

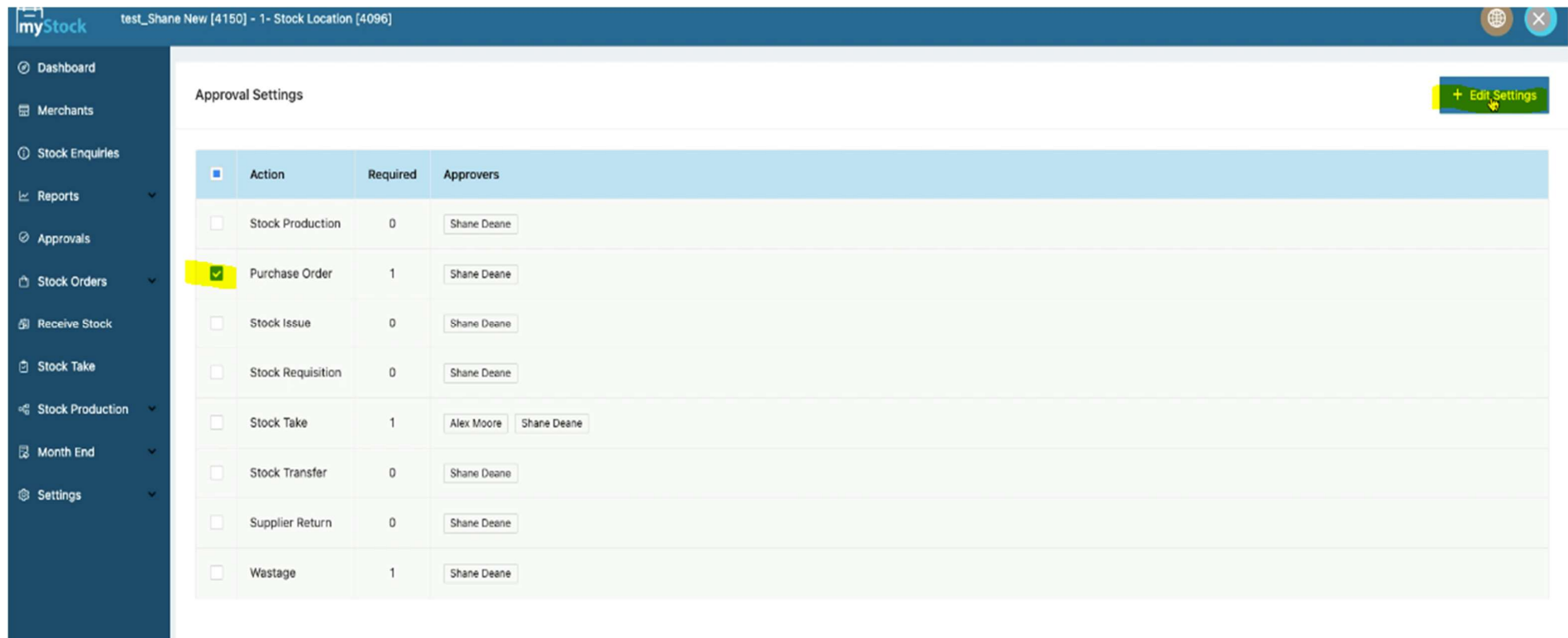
Approval Settings [+ Edit Settings](#)

<input type="checkbox"/>	Action	Required	Approvers
<input type="checkbox"/>	Stock Production	0	Shane Deane
<input type="checkbox"/>	Purchase Order	1	Shane Deane
<input type="checkbox"/>	Stock Issue	0	Shane Deane
<input type="checkbox"/>	Stock Requisition	0	Shane Deane
<input type="checkbox"/>	Stock Take	1	Alex Moore Shane Deane
<input type="checkbox"/>	Stock Transfer	0	Shane Deane
<input type="checkbox"/>	Supplier Return	0	Shane Deane
<input type="checkbox"/>	Wastage	1	Shane Deane

- 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 screenshot shows the 'myStock' interface with the 'Approval Settings' page. The left sidebar contains a menu with options: Dashboard, Merchants, Stock Enquiries, Reports, Approvals, Stock Orders, Receive Stock, Stock Take, Stock Production, Month End, and Settings. The main content area is titled 'Approval Settings' and features a table with columns: Action, Required, and Approvers. A green '+ Edit Settings' button is in the top right corner. The table lists various stock actions with checkboxes for selection.

<input type="checkbox"/>	Action	Required	Approvers
<input type="checkbox"/>	Stock Production	0	Shane Deane
<input checked="" type="checkbox"/>	Purchase Order	1	Shane Deane
<input type="checkbox"/>	Stock Issue	0	Shane Deane
<input type="checkbox"/>	Stock Requisition	0	Shane Deane
<input type="checkbox"/>	Stock Take	1	Alex Moore, Shane Deane
<input type="checkbox"/>	Stock Transfer	0	Shane Deane
<input type="checkbox"/>	Supplier Return	0	Shane Deane
<input type="checkbox"/>	Wastage	1	Shane Deane

- 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.

approvals myStock test_Shane New [4150] - 1- Stock Location [4096]

Approval Settings

Action	Required	Approvers
<input type="checkbox"/> Stock Production	0	Shane Deane
<input checked="" type="checkbox"/> Purchase Order	1	Shane Deane
<input type="checkbox"/> Stock Issue	0	Shane Deane
<input type="checkbox"/> Stock Requisition	0	Shane Deane
<input type="checkbox"/> Stock Take	1	Alex Moore Shane Deane
<input type="checkbox"/> Stock Transfer	0	Shane Deane
<input type="checkbox"/> Supplier Return	0	Shane Deane
<input type="checkbox"/> Wastage	1	Shane Deane

Edit Approval Setting

Required: 1

Filter

Name	Action
Alex Moore	<input type="checkbox"/> <input type="checkbox"/>
Sarah Buys	<input type="checkbox"/> <input type="checkbox"/>
Shane Deane	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>







< 1 >

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

Edit Approval Setting ✕

Required
2

Filter







Name	Action
Alex Moore	 
Sarah Buys	 
Shane Deane	 

- 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.

Edit Approval Setting ✕

Required
1

Filter

Name	Action
Alex Moore	 
Sarah Buys	 
Shane Deane	 








Can Approve

Edit Approval Setting ✕

Required

1

Filter

Name	
Alex Moore	  
Sarah Buys	 
Shane Deane	 







- 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

myStock test_Shane New [4150] - 1- Stock Location [4096]

Approval Settings [+ Edit Settings](#)

<input type="checkbox"/>	Action	Required	Approvers
<input type="checkbox"/>	Stock Production	0	Shane Deane
<input checked="" type="checkbox"/>	Purchase Order	1	Alex Moore Shane Deane
<input type="checkbox"/>	Stock Issue	0	Shane Deane
<input type="checkbox"/>	Stock Requisition	0	Shane Deane
<input type="checkbox"/>	Stock Take	1	Alex Moore Shane Deane
<input type="checkbox"/>	Stock Transfer	0	Shane Deane
<input type="checkbox"/>	Supplier Return	0	Shane Deane
<input type="checkbox"/>	Wastage	1	Shane Deane

Approving a Purchase Order:

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

test_Shane New [4150] - 1- Stock Location [4096]

Approval Settings [+ Edit Settings](#)

<input type="checkbox"/>	Action	Required	Approvers
<input type="checkbox"/>	Stock Production	0	Shane Deane
<input checked="" type="checkbox"/>	Purchase Order	1	Alex Moore Shane Deane
<input type="checkbox"/>	Stock Issue	0	Shane Deane
<input type="checkbox"/>	Stock Requisition	0	Shane Deane

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

test_Shane New [4150] - 1- Stock Location [4096]

Purchase Orders [+ Purchase Order](#) [+ PO From Pending PO List](#)

Draft Placed Completed Template Rejected

Date	Reference	From	Name	Links
2023-06-05 12:00	PO-4096-1018	Spirits Supplier	Liquor - Beers and Rum	Receive Stock

< 1 >

- 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

<input type="checkbox"/>	Item	Unit	Qty	Unit Price	Extended*	Includes Taxes	
<input type="checkbox"/>	Beers Black Label	Each	10	32.50	373.75	48.75	
<input type="checkbox"/>	Beers Castle-Light	Each	10	32.50	373.75	48.75	
<input type="checkbox"/>	Beers Windhoek	Each	10	33.33	383.33	50.00	
<input type="checkbox"/>	Rum Bacardi	Tot	10	10.00	115.00	15.00	
<input type="checkbox"/>	Rum Captain Morgan	Tot	10	10.00	115.00	15.00	
<input type="checkbox"/>	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



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."

Purchase Orders

+ Purchase Order

+ PO From Pending PO List

Draft

Placed

Completed

Template

Rejected

Date	Reference	From	Name	Links	Status	Approvers
2023-06-05 12:00	PO-4096-1018	Spirits Supplier	Liquor - Beers and Rum		Awaiting Approval	
2023-05-22 10:10	PO-4096-1012	Cider Supplier			Placed	

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

myStock test_Shane New [4150] - 1- Stock Location [4096]									
Approvals									
Created	Name	Reference	Created By	Destination	Source	Approved	Approvers		
2023-06-05 12:09	Liquor - Beers and Rum	PO-4096-1018	Shane Deane	1- Stock Location	Spirits Supplier	0/1	Shane Deane,	Alex Moore	
< 1 > 20 / page									

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

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

Currency: South African rand

Awaiting Approval		Unit	Qty	Unit Price	Extended*	Includes Taxes
Item						
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

< 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

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

←

Black Label

×

Price is 35.00 @ Cost of 30.05 per each

Order Unit

each

Quantity

−

10

+

Please enter either the Exclusive Cost per each OR the Extended Total for 10 x each

Cost per each (Excl)

32.5

Extended total cost (Excl)

☐ Excl

373.75

←

Done

→

- 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.

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

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

- 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

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
Total Excluding Tax						1 283.33
Taxes						192.50
Total Value						1 475.83

< 1 2 > 5 / page

Created:

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

Approvers:

Shane Deane Alex Moore

Edit + Notes Print X Reject Approve

Approve purchase order



Are you sure you want to approve this purchase order?

Notes

X Cancel

Approve

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

Approvals

Created	Name	Reference	Created By	Destination	Source	Approved	Approvers
No Data							

Viewing Approved Purchase Orders:

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

approvals
myStock

test_Shane New [4150] - 1- Stock Location [4096]

Purchase Orders

+ Purchase Order + PO From Pending PO List

Draft **Placed** Completed Template Rejected

Date	Reference	From	Name	Links	Status	Approvers
2023-06-05 12:11	PO-4096-1018	Spirits Supplier	Liquor - Beers and Rum		Placed	Shane Deane
2023-05-22 10:10	PO-4096-1012	Cider Supplier			Placed	