Configuring Approval Processes

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Overview

Approval processes start when a user submits a sales, purchasing, invoicing, or Letter of Guarantee action that requires review before it can proceed. In Pams, approval controls can apply to Sales Jobs, Orders, Purchasing POs, Invoices, and LGs, using the approval limits assigned to the people responsible for each branch.

The administrator sets the relevant approval limits for each approving user, including **Approval Sales Limit Value**, **Approval Purchase Limit Value**, **Approval Invoices Limit Value**, and **Approval LGs Limit Value**. Pams then shows approval requests and decisions through statuses such as **Awaiting Approval**, **Approved**, **Rejected Approval**, and **Applied (requested)**.

The final outcome is a controlled approval path in which users can request approval for the relevant record, authorized approvers can accept or decline it, and the administrator can review changes and decisions in **Audit History**. This keeps branch operations moving while ensuring that larger or more sensitive commercial commitments receive the required review.

[SCREENSHOT: Approval Limits area showing Sales, Purchase, Invoices, and LGs approval limit fields]

Trigger: [What starts this process]

Approval configuration begins when your organization needs certain commercial actions to be reviewed before users can continue. This may happen when a branch starts handling higher-value Orders, when a new purchaser is assigned to approve Purchasing POs, or when responsibility for Invoices or LGs changes.

In daily work, an approval request is triggered when a user applies approval to a record. The exact request depends on the work being performed:

- A sales user may use **Apply Approval for Booking** while working on a Sales Job.
- A sales user may need approval for an offer or Orders before it is confirmed.
- A purchaser may use **Apply Approval for Purchasing** for a Purchasing PO.

- A finance user may use **Apply Approval For Invoicing** for an Invoice.
- A user managing guarantees may use **Apply Approval for LG** for a Letter of Guarantee.

After the request is submitted, the record can show **Awaiting Approval** or **Applied (requested)**. The assigned approver reviews the commercial details, such as the client, principal, amount, commission, margin, payment terms, or guarantee value, depending on the record.

Approval configuration should be reviewed whenever a user joins or leaves a branch, changes responsibilities, or receives a different approval authority. A user who can approve Orders but not Purchasing POs, for example, needs the correct limits in the relevant approval categories.

Before changing approval limits, make sure the fields required for approval decisions are already working as intended. If your team uses additional required fields or validation conditions, review Configuring Dynamic Validation first so users do not submit incomplete requests for approval.

Step-by-Step Process

1. Open **Configuration** in Pams and locate the user information for the person who will review approvals. Confirm that the person is an active **User** and that their access matches the branch and work area where they will approve records. Use the person's **User Information** and assigned **Roles** to confirm their responsibility before setting any approval limits.

2. Open the user's **Approval Limits** section. Review the approval categories available for that user. Pams provides separate limits for sales, purchasing, invoicing, and LGs, so assign only the authority the person is expected to use.

Approval category	Field to review	Used for
Sales	**Approval Sales Limit Value**	Sales-related approval requests, including booking, offers, and Orders
Purchasing	**Approval Purchase Limit Value**	Purchasing PO approval requests
Invoices	**Approval Invoices Limit Value**	Invoice approval requests

Approval category	Field to review	Used for
LGs	**Approval LGs Limit Value**	Letter of Guarantee approval requests

3. Enter the appropriate approval limit for each category. Where your organization gives a person unrestricted authority in a category, select the matching unlimited option: **Approval Sales Unlimited**, **Approval Purchase Unlimited**, **Approval Invoices Unlimited**, or **Approval LGs Unlimited**. Do not select an unlimited option simply because a user is senior; use it only when that person is permitted to approve any amount in that category.
4. Click **Save** to keep the approval limits. If you are finished with the user record, choose **Save and Close**. Repeat the same process for each approver who supports the branch’s sales, purchasing, finance, or LG work.
5. Test the approval route using a suitable record. For example, open a Sales Job, Purchasing PO, Invoice, or LG that requires review and apply the appropriate approval request. Confirm that the record changes to **Awaiting Approval** or **Applied (requested)** rather than proceeding as if no review were required.
6. Ask the assigned approver to open the request and make a decision using **Accept** or **Decline**, where available. Confirm that Pams updates the record to **Approved**, **Declined**, **Rejected Approval**, or the corresponding decision status shown on that record.
7. Open **Audit History** to verify the setup and the test decision. Review entries such as **Created On**, **Created By**, **Last Modification On**, **Last Modification By**, **Changes**, and approval-related notifications. This gives you a record of who changed limits, requested approval, and made the final decision.

[SCREENSHOT: A record showing Awaiting Approval and the available approval decision actions]

Roles and Responsibilities

Approval processes work best when each person has a clear responsibility. The administrator maintains the approval setup, while operational users submit requests only for the records they are responsible for. Approvers should review the commercial information before accepting or declining a request.

Step	Responsible person	What they do in Pams
Confirm branch and user responsibility	Administrator	Reviews the user’s **User Information**, **Roles**, and branch responsibilities before granting approval authority.
Set sales approval authority	Administrator	Enters **Approval Sales Limit Value** or selects **Approval Sales Unlimited** for authorized sales approvers.
Set purchasing approval authority	Administrator	Enters **Approval Purchase Limit Value** or selects **Approval Purchase Unlimited** for authorized purchasing approvers.
Set invoice approval authority	Administrator or finance Inquiry	Enters **Approval Invoices Limit Value** or selects **Approval Invoices Unlimited** for authorized invoice approvers.
Set LG approval authority	Administrator or LG responsible person	Enters **Approval LGs Limit Value** or selects **Approval LGs Unlimited** for authorized LG approvers.
Request approval	Salesperson, purchaser, finance user, or LG user	Applies approval from the relevant Sales Job, Orders, Purchasing PO, Invoice, or LG record.
Review the request	Assigned approver	Reviews the record details and uses **Accept** or **Decline** where those actions are available.
Verify the history	Administrator or manager	Opens **Audit History** and checks approval-related changes, decisions, and timestamps.

For Sales Jobs and Orders, the approver should review the client, principal, **Total Order Price**, **Commission (%)**, **Margin**, delivery details, and payment information before approving. For Purchasing POs, review the sub-supplier, items, quantities, unit price, and total price. For Invoices and LGs, review the amount, status, dates, and any related commercial notes.

A person should not approve their own work unless that is an explicitly accepted business rule for your organization. Keep sales, purchasing, finance, and LG authority separate where different people are accountable for those decisions.

What Can Go Wrong

Where the issue appears	What you may see	How to fix it
User setup	The intended approver cannot review a request.	Open the person’s **User Information** and confirm that the person is an active **User** with the appropriate **Roles** and approval responsibility.
Approval Limits	An approver can review one type of record but not another.	Check each separate field: **Approval Sales Limit Value**, **Approval Purchase Limit Value**, **Approval Invoices Limit Value**, and **Approval LGs Limit Value**. A limit in one category does not automatically apply to the others.
Amount exceeds authority	A request remains **Awaiting Approval** because the available approver is not authorized for the amount.	Review the amount on the Orders, Purchasing PO, Invoice, or LG, then compare it with the assigned approval limit. Update the limit only if the person is authorized to approve that value.
Incorrect unlimited authority	A user can approve values beyond their intended responsibility.	Reopen **Approval Limits**, remove the relevant unlimited option, enter the correct limit value, and click **Save**.
Approval request	The record does not show **Awaiting Approval** or **Applied (requested)** after the user tries to request approval.	Confirm that the user is working on the correct record and using the relevant approval option, such as **Apply Approval for Purchasing** or **Apply Approval For Invoicing**. Also check whether the record is already **Approved**, **Rejected Approval**, or cancelled.
Approver decision	The approver declines a request without enough explanation for the requester.	Ask the approver to use the record’s comments or available decision details to explain what must change. The requester can then correct the Sales Job, Purchasing PO, Invoice, or LG before submitting again.
Audit review	You cannot tell who changed limits or made a decision.	Open **Audit History** and review **Changes**, **Created By**, **Last Modification By**, **Created On**, and **Last Modification On**. If the required entry is not visible, verify that you are reviewing the correct record.

Do not solve a delayed request by assigning unlimited authority to several people. First identify whether the delay comes from the wrong approval category, an amount above the limit, or an approver who is not available for that branch.

Tips & Best Practices

- Set approval limits separately for sales, purchasing, invoices, and LGs. A sales manager may be the correct person for **Approval Sales Limit Value** but not for **Approval Purchase Limit Value** or **Approval Invoices Limit Value**.
- Use the unlimited options carefully. **Approval Sales Unlimited**, **Approval Purchase Unlimited**, **Approval Invoices Unlimited**, and **Approval LGs Unlimited** are best reserved for people with clear authority to approve all values in that category.
- Review approval limits when branch responsibilities change. Update the user record when a purchaser takes over a new branch, a sales manager changes team responsibility, or finance responsibility moves to another person.
- Test each approval category after setup. Create or open an appropriate Sales Job, Purchasing PO, Invoice, and LG record, then submit an approval request. A test confirms that the record reaches **Awaiting Approval** and that the responsible person can make a decision.
- Check the commercial information before asking for approval. For sales records, verify **Client**, **Principal**, **Total Order Price**, **Commission (%)**, **Margin**, and delivery commitments. For purchasing records, verify the **Sub-supplier**, items, quantities, and total price. Complete records reduce rejected requests and repeated review cycles.
- Keep approval decisions visible in the relevant record rather than relying on separate messages. The record status, notification history, comments, and **Audit History** provide the operational trail for Sales Jobs, Purchasing POs, Invoices, and LGs.
- Use Configuring Dynamic Validation when important fields must be completed before a user can request approval. This helps ensure that approvers receive complete commercial information rather than incomplete requests.

[SCREENSHOT: Audit History showing an approval request, a decision, and the user who made each change]

Related Workflows

Approval processes support several connected workflows in Pams. Use the following guides when configuring approval controls for the records your team handles:

- Configuring Dynamic Validation explains how to require important information before a user submits a record for review. Use it alongside approval limits when sales, purchasing, invoice, or LG requests must include specific commercial details.

- Managing Pams Users explains how to maintain user information for the people who request and approve work. Review user access before assigning approval limits.
- Managing Roles and Teams helps you align approval responsibility with your sales, purchasing, finance, and branch teams. Use it when responsibility changes across teams or branches.
- Preparing Customer Offers and Confirming Orders cover the sales records that may require approval before commercial commitments are confirmed.
- Creating Purchase Orders explains the Purchasing PO workflow. Apply purchasing approval controls where purchase values or supplier commitments require review.
- Managing AR Invoices covers customer invoices that may use **Apply Approval For Invoicing** before release or processing.
- Managing Letters of Guarantee explains the LG workflow, including requests that may require **Apply Approval for LG**.
- Reviewing Audit and Change History provides more detail on using **Audit History** to review configuration changes, approval requests, and decisions.

Approval controls should reflect the same responsibilities your teams use in their daily Sales Jobs, Purchasing POs, Invoices, and LG work. Keeping these workflows aligned prevents approval routes from becoming a separate process that users must work around.

FAQ

Which records can require approval in Pams?
Pams includes approval controls for sales, purchasing, invoicing, and LG activities. Depending on the record and your organization’s configuration, users may apply approval for booking, sales offers, Orders, Purchasing POs, Invoices, or LGs. Look for approval-related labels such as **Apply Approval for Booking**, **Apply Approval for Purchasing**, **Apply Approval For Invoicing**, and **Apply Approval for LG**.

Can one person approve sales, purchasing, invoices, and LGs?
Yes, if that person is authorized for all of those responsibilities. Set the appropriate values in each category within **Approval Limits**. Approval authority is separate for

sales, purchasing, invoices, and LGs, so review every relevant limit instead of assuming one limit covers all activities.

What is the difference between an approval limit and an unlimited approval option?
An approval limit uses a value entered in **Approval Sales Limit Value**, **Approval Purchase Limit Value**, **Approval Invoices Limit Value**, or **Approval LGs Limit Value**. An unlimited option removes the value restriction for that category. Use **Approval Sales Unlimited**, **Approval Purchase Unlimited**, **Approval Invoices Unlimited**, or **Approval LGs Unlimited** only for authorized approvers.

Why is a record still marked Awaiting Approval?
The request has been submitted but no final approval decision has been recorded. Ask the responsible approver to open the relevant record and use **Accept** or **Decline**, where available. Also confirm that the record amount is within the approver's assigned limit.

What should the requester do after a rejection?
Review the record status, comments, and any rejection details. Correct the commercial information that needs attention, such as pricing, margin, commission, quantities, payment terms, delivery details, or LG value. Then submit the approval request again using the relevant approval option.

How can I verify who changed an approval limit or made a decision?
Open **Audit History** for the relevant user record or business record. Review **Created By**, **Created On**, **Last Modification By**, **Last Modification On**, and **Changes** to identify the people and dates associated with the configuration change, request, or decision.