Job Approvals Functionality

The Job Approval process was designed to add a layer of control to the Job process which requires that one or multiple Users must approve the job prior to the job being released to your installation department.

You may set up a job type to first require the Sales Manager to approve the job, then the Accounting Manager may approve the commissions, and lastly the Operations Manager will approve the job for processing.

You have the option of requiring Job Approvals on all Job Types or just specific Job Types.

The Job Approval process is driven by the setup in several SedonaSetup tables.

A flag located on the Setup Processing for Job Management form, Approval Processing turns on or off the ability to use Job Approvals. This flag must be selected to activate the Job Approval functionality.

The Job Approvals setup table will require you to setup at least one Approval Group code. Job Approval Groups are a list of the groups you require to approve a job. These group codes may be labeled with a department name or a user's job title.

Each Job Approval Group is linked to a default approval level. You may have as many approval levels as needed. These approval levels determine a level of authority. For example a Level 3 has the highest level of authority where Level 1 has the lowest level of authority. A Job Approval group with a higher level may approve a job for a group with a lesser approval level.

Once the Job Approval Groups codes have been created, you will link each employee who will participate in Job Approvals to their Approval Group code. This linking is done on the Employee record in SedonaSetup.   An Employee may be linked to only one Approval Group. Only employees assigned to a Job Approval Group will be able to approve jobs.

Once Job Approval Groups have been set up, you are able to select these on the Job Approvals tab on the Job Type setup record.   The approval level assigned to the job approval group in the Job Approval Group setup table will be the default value on the job type, however this may be overridden by the User.

Each Job Type may be assigned a list of groups which must approve the job. When a new job is created which is set up to use job approvals, the application will not let you processes the job completely until the approvals have been signed-off. You do not have to set up approvals on all your job types.

When the Job Approvals feature is activated, the menu option, Job Approvals, is displayed within the Job Management module. When selected, the Job Approvals option opens a list of all jobs awaiting approval. If the user logged into the application has been linked to a job approval group on their employee record, a list of jobs will be displayed to approve.

For users that are not linked to a job approval group on their employee record yet have the Job Approval user group security option granted, the job approval list will be empty.

Jobs may be approved from the Job Approval list or the user with job approval permissions may approve within the job record from the Job Approval button located on the Job toolbar.

Job Approval Types
There are three types of Job Approvals with a few possible setup combinations. The approval type is selected for each Job Approval Group on the Approvals form of the Job Type setup.

- Approve the job but not approve the job for processing
- Approve the job and approve the job for processing
- Approve the job, approve the commissions but not approve the job for processing
- Approve the job, approve the commissions and approve the job for processing

A User may approve a job for processing without having the commission approval completed. If a job has not been approved for processing, a User will not be able to order parts, schedule appointments, enter commissions, or enter the job costing estimate.

Once a User approves a job for processing the remaining toolbars and buttons will be displayed on the job record. Until the job is approved for processing the User may only perform the following functions:

- Enter Work Order Information
- Enter Job System Information
- Enter Install Charges
- Enter Recurring Charges
- Create a Materials List
- Enter Custom Field Information
- Enter Job Notes
- View Job Log

Sample Job Approval Process Flow
The flow chart provided below is a very simple example of how you may design your Job Approval process. You may have more or fewer Job Approval Groups associated with a Job Type.

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Planning
Before working on the setup tables for Job Approvals, first determine which Users or types of Users will have permission to approve a job. Then determine whether one or many of the Job Approval Groups will be allowed to approve other approvals that have not been signed off on a job.
A User with a higher approval level may approve all approval groups equal to or less than their approval level. This will help you to determine the approval level assigned to the Job Approval Groups on the Job Type.
Determine which Job Types will require the approval process. You may not want to use Job Approvals for small jobs with either a small revenue amount or that will be completed in a very short period of time. Large jobs with high revenue and expenses would most likely go through the Job Approval process.
□ Until a job is approved for processing, the job task list is not available on the job toolbar. You may want to consider changing the default job status on the first job task to Awaiting Approvals so that when a user looks at the job queue, they will clearly see the job has not yet be approved for processing.

If you set up Job Approvals for Job Types where there are jobs already in process, these jobs will not be affected. Only new jobs created after the Job Approvals list is created for the Job Type will use the Job Approvals.