# Enterprise
## by HansaWorld

Integrated Accounting, CRM and ERP System for Mac OS X, Windows, Linux, PocketPC 2003 and AIX

Business Alerts Module

# Preface

The Enterprise by HansaWorld range of products contains a number of powerful accounting, CRM and ERP systems for the Windows, Mac OS X, Linux, PocketPC 2003 and AIX environments.

The programs are designed to make administration and accounting as easy and fast as possible. They are similar in operation regardless of platform. In the specific areas where there are significant differences, these are described and illustrated in full. In all other cases illustrations are taken from the Windows 7 version.

Text in square brackets - [Save], [Cancel] - refers to buttons on screen.

Information in this document is subject to change without notice and does not represent a commitment on the part of HansaWorld. The Software described in this document is a sophisticated information management system. Features are liable to alteration without notice. This documentation is not intended as a *de facto* representation of the system, but as an overview of its facilities. It cannot be exhaustive in all respects. Whilst effort is made to ensure the accuracy of the information published concerning the features and use of HansaWorld software, it is still possible that certain functions mentioned may not be fully implemented, may not be available under certain circumstances, or may possibly relate to a future release of the software. Errors and omissions excepted. HansaWorld accepts no contingent liabilities. All HansaWorld software related transactions are subject to HansaWorld's Conditions of Sale and Software Licence Agreement. All rights reserved.

# How these manuals are organised

## Introduction to Enterprise by HansaWorld

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|---|---|
| **Introduction** | Installing Enterprise by HansaWorld, the basic ideas |
| **Work Environment** | Basic elements of Enterprise by HansaWorld: modules, registers, windows, menus, functions, buttons |
| **Accounting Principles** | |
| | About the place of Enterprise by HansaWorld in your business, integration between ledgers, objects |
| **Starting Work** | Entering opening balances |

## Manuals for each Module

| | |
|---|---|
| **Assets** | Asset accounting, calculation of depreciation using user-definable depreciation models, revaluation |
| **Business Alerts** | System alerts, transaction approval processes |
| **Cash Book** | Inward and outward cash transactions, receipts and payments |
| **Consolidation** | Multi-company reporting, subsidiaries and daughter companies |
| **Contracts** | Periodic invoicing and repeat billing, contract renewals, contract quotations, contracts from invoices |
| **CRM** | Time management using daily or monthly calendar formats. Contact and customer history. Customer letters and mailshots. Target time. Employee time statistics |
| **Currency** | Multi-currency in all modules |
| **Customers, Suppliers and Contact Persons** | |
| | Customers and suppliers, customer categories and reports |
| **Expenses** | Payments to and from employees |
| **Items and Pricing** | Products and services, pricing |
| **Job Costing** | Project management. Recording time, expenses and purchases. Instalments. Pricing by consultant, project, task and time of day. Budgets and quotations |
| **Mail** | Internal mail, external mail (email), conferences, off-line local mail, chat |
| **Nominal Ledger** | Transactions, simulations, budgets and revised budgets. Error correction. Account reconciliation. Transaction templates. Flexible management and financial reports with multi-dimensional analysis and drill-down to transaction level |
| **Production** | Multi-level assemblies from components |
| **Purchase Ledger** | Purchase invoices, payments and payment suggestions, creditor reports, prepayments, accruals, acceptance |
| **Purchase Orders** | Purchase orders, goods receipts and purchase pricing |
| **Quotations** | Sending quotations, call backs, pipeline management, opportunity forecasting, and conversion ratio reports |
| **Report Generator** | User-definable reports |
| **Sales Ledger** | Invoices, receipts, debtor reports and documents, deposits and prepayments, accruals |
| **Sales Orders** | Orders and deliveries. Invoices from orders |
| **Service Orders** | Management of service stock, invoicing of repairs, warranties |
| **Stock** | Deliveries, goods receipts and stock movements, batch and serial number tracking, multi-location stock management |
| **System Module** | Settings and parameters. System-wide usage |

# Contents

# The Business Alerts Module

In outline, the Business Alerts module in Enterprise by HansaWorld offers two features—

- It allows you to set up various notifications. For example, key members of staff can be notified when high value and/or low margin Invoices, Orders or Quotations are entered, and Customers can be notified about imminent Deliveries. Key members of staff can also be warned about certain system events such as unexpected server restarts or problems with the e-mail queue. Notification can be by message, Mail or test (SMS) message. Please refer to the descriptions of the settings in the Business Alerts module immediately below for details.

- It allows you to set up approval processes for large-value transactions. larger organisations, higher value transactions must be approved before they can be proceeded with. Please refer to page 26 below for details.

# Settings

## Introduction

The Business Alerts module contains the following settings—
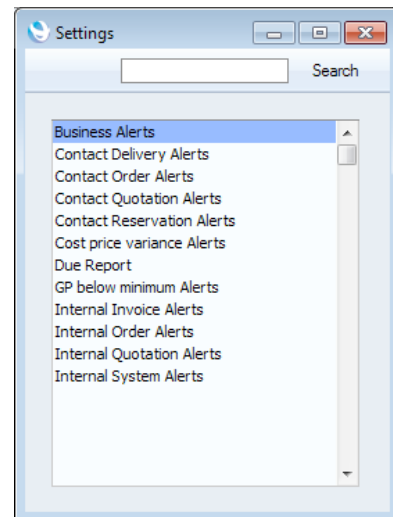


To edit a setting, ensure you are in the Business Alerts module using the [Module] button in the Master Control panel or using the Ctrl-0/⌘-0 keyboard shortcut. Then, click the [Settings] button in the Master Control panel. The list shown above appears. Then, double-click the relevant item in the list. You can also use the Ctrl-S/⌘-S keyboard shortcut to open the 'Settings' list.

# Business Alerts

The Business Alerts setting contains a number of preferences that are used by the following other settings in the Business Alerts module: Contact Delivery Alerts, Contact Order Alerts, Contact Quotation Alerts, Contact Reservation Alerts, Internal Order Alerts and Internal Quotation Alerts.

If you have more than one Company in your database, you should configure this setting separately in each Company. For example, each Company can have a different phone or mobile number from which text (SMS) messages will be sent.

The Business Alerts setting contains the following options and fields—
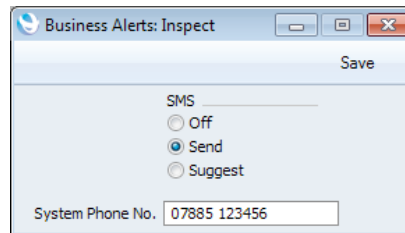


**SMS**          Use these options to control how text (SMS) messages will be sent, when triggered by the Contact Delivery Alerts, Contact Order Alerts, Contact Quotation Alerts, Contact Reservation Alerts, Internal Order Alerts and Internal Quotation Alerts settings.

    **Off**          Text (SMS) messages will not be sent.

    **Send**          Text (SMS) messages will be sent automatically. Messages will not be opened on screen before they are sent, so you will not be given the opportunity to personalise the messages.

    **Suggest**          Each Text (SMS) message will be opened in a 'Text SMS: New' window before it is sent. The window title ('New') signifies that the message has not yet been saved. You therefore have opportunities both to personalise the message and to decide whether to send it at all.

**System Phone No.** The phone number that you specify here will be used as the source of each text (SMS) message. Bear in mind when specifying this number that Customers may use it to reply. If you do not specify a phone number here, the source phone number will be taken from the Internal System Alerts setting (described below on page 23).

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# Contact Delivery Alerts

Whenever you approve and save a Delivery, a text (SMS) message can be sent automatically to the Customer, informing them that the arrival of their Items is imminent. If you want to use this feature, follow these steps—

1.  Sending text (SMS) messages is a chargeable Cloud Service. To use it, ensure you have registered your database using the Automatic Internet Enabler method, as described in the 'Enabler Key' section in the first chapter of the 'Introduction to Enterprise by HansaWorld' manual. Please contact your local HansaWorld representative to sign up for the service and for pricing details.

2.  Open the Business Alerts setting (described above on page 6) and set the SMS Type to "SMS" or "Suggest".

3.  Specify a System Phone No. in the Business Alerts setting or in the Internal System Alerts setting. This number will be used as the source of each text (SMS) message and Customers may use it to reply.

4.  Configure the Contact Delivery Alerts setting as described below.

The Mobile Number to which a text (SMS) message will be sent will be chosen as follows—

i.   If the Contact Person quoted in the Attention field in the Order from which a Delivery was created has a Mobile Number, the text (SMS) message will be sent to that Mobile Number. The Contact Person must be connected to the Customer in the Contact Relations register (i.e. the name of the Contact Person must appear in the list at the bottom of the window when you are looking at the Contact record for the Customer).

ii.  If the Customer quoted in the Order has a Mobile Number, the text (SMS) message will be sent to that Mobile Number.

iii. If the Contact Person quoted in the Order has a Mobile Number, the text (SMS) message will be sent to that Mobile Number. Compared to point (i), this will be a looser search: the search will be by Contact Person name only and the Contact Person will not be connected to the Customer in the Contact Relations register (i.e. there won't be a Contact Relations record connecting the Contact Person and the Customer).

If no Mobile Number has been found after these steps, no text (SMS) message will be sent. Please refer to the 'Customers, Suppliers and Contact Persons' manual for more details about the Contact Relations register.

For the text (SMS) message to be sent successfully, you must have entered the Mobile Number as an international number. You can place + or 00 at the beginning of a number, but + is to be preferred as it is the standard method of signifying international numbers and will not change.

If you have set the SMS Type to "SMS" in the Business Alerts setting, the sending of each text (SMS) message will be completely automatic. Therefore, you will not be given the opportunity to personalise the message. However, if you set the SMS Type to "Suggest", the 'Text SMS: New' window will open when you save an approved Delivery. This will give you the opportunity to personalise the message (e.g. to specify a delivery time). When you click the [Save] button, your Signature will appear in the Person field and the Sent box will be marked automatically, signifying that the message has been sent. If you click the [Cancel] button, the message will not be sent or saved.

The Contact Delivery Alerts setting contains the following options and fields—
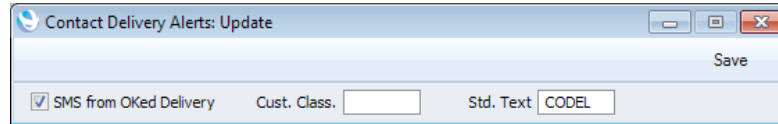


**SMS from OKed Delivery**

> Tick this box if you would like an automatic text (SMS) message to be sent to a Customer whenever you approve and save a Delivery.

**Cust. Class.**      **Paste Special**          Contact Classifications setting, CRM module

> If you would only like to send text (SMS) messages to Customers belonging to a particular Contact Classification, specify that Classification here. If you enter a number of Classifications separated by commas, text (SMS) messages will only be sent to Customers featuring all the Classifications listed.

**Std. Text**          **Paste Special**          Standard Text register, CRM module

> Specify here the Code of a record in the Standard Text register in the CRM module. This record should contain the text of the message that will be sent to the Customer.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# Contact Order Alerts

Whenever you save an Order for the first time, a text (SMS) message can be sent automatically to the Customer, informing them that their Order has been received and registered in your database. If you want to use this feature, follow these steps—

1. Sending text (SMS) messages is a chargeable Cloud Service. To use it, ensure you have registered your database using the Automatic Internet Enabler method, as described in the 'Enabler Key' section in the first chapter of the 'Introduction to Enterprise by HansaWorld' manual. Please contact your local HansaWorld representative to sign up for the service and for pricing details.

2. Open the Business Alerts setting (described above on page 6) and set the SMS Type to "SMS" or "Suggest".

3. Specify a System Phone No. in the Business Alerts setting or in the Internal System Alerts setting. This number will be used as the source of each text (SMS) message and Customers may use it to reply.

4. Configure the Contact Order Alerts setting as described below.

The Mobile Number to which a text (SMS) message will be sent will be chosen as follows—

i.   If the Contact Person quoted in the Attention field in an Order has a Mobile Number, the text (SMS) message will be sent to that Mobile Number. The Contact Person must be connected to the Customer in the Contact Relations register (i.e. the name of the Contact Person must appear in the list at the bottom of the window when you are looking at the Contact record for the Customer).

ii.  If the Customer quoted in the Order has a Mobile Number, the text (SMS) message will be sent to that Mobile Number.

iii. If the Contact Person quoted in the Order has a Mobile Number, the text (SMS) message will be sent to that Mobile Number. Compared to point (i), this will be a looser search: the search will be by Contact Person name only and the Contact Person will not be connected to the Customer in the Contact Relations register (i.e. there won't be a Contact Relations record connecting the Contact Person and the Customer).

If no Mobile Number has been found after these steps, no text (SMS) message will be sent. Please refer to the 'Customers, Suppliers and Contact Persons' manual for more details about the Contact Relations register.

For the text (SMS) message to be sent successfully, you must have entered the Mobile Number as an international number. You can place + or 00 at the beginning of a number, but + is to be preferred as it is the standard method of signifying international numbers and will not change.

If you have set the SMS Type to "SMS" in the Business Alerts setting, the sending of each text (SMS) message will be completely automatic. Therefore, you will not be given the opportunity to personalise the message. However, if you set the SMS Type to "Suggest", the 'Text SMS: New' window will open when you save an Order. This will give you the opportunity to personalise the message (e.g. to specify a delivery time). When you click the [Save] button, your Signature will appear in the Person field and the Sent box will be marked automatically, signifying that the message has been sent. If you click the [Cancel] button, the message will not be sent or saved.

The Contact Order Alerts setting contains the following options and fields—



**SMS from Order**   Tick this box if you would like an automatic text (SMS) message to be sent to a Customer whenever you save an Order for the first time.

**Limit**   If you would only like text (SMS) messages to be sent to Customers who place Orders worth more than a certain amount, specify that amount here.

A Customer will receive a message if they place an Order where the TOTAL (i.e. total including VAT) is greater than this figure.

No Currency conversion will take place. So if the Limit is 1000.00 for example, Customers placing Orders worth GBP 1000.01 and USD 1000.01 will both receive messages.

Remember that a message will only be sent from an Order when you save it for the first time. Therefore, if you set a Limit and are in the habit of saving Orders as you add Items to them, be aware that a message will not be sent if you save an Order before its TOTAL has reached the Limit.

**Customer Class.**   **Paste Special**   Contact Classifications setting, CRM module

If you would only like to send text (SMS) messages to Customers belonging to a particular Contact Classification, specify that Classification here. If you enter a number of Classifications separated by commas, text (SMS) messages will only be sent to Customers featuring all the Classifications listed.

**Order Class**   **Paste Special**   Order Classes setting, Sales Orders module

If you would only like text (SMS) messages to be sent to the Customers of Orders with a particular Order Class, specify that Class here.

**Std. Text**   **Paste Special**   Standard Text register, CRM module

Specify here the Code of a record in the Standard Text register in the CRM module. This record should contain the text of the message that will be sent to the Customer.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# Contact Quotation Alerts

Whenever you mark a Quotation as Accepted and save it, a text (SMS) message can be sent automatically to the Customer, to confirm that you have received their acceptance of the Quotation. If you want to use this feature, follow these steps—

1. Sending text (SMS) messages is a chargeable Cloud Service. To use it, ensure you have registered your database using the Automatic Internet Enabler method, as described in the 'Enabler Key' section in the first chapter of the 'Introduction to Enterprise by HansaWorld' manual. Please contact your local HansaWorld representative to sign up for the service and for pricing details.

2. Open the Business Alerts setting (described above on page 6) and set the SMS Type to "SMS" or "Suggest".

3. Specify a System Phone No. in the Business Alerts setting or in the Internal System Alerts setting. This number will be used as the source of each text (SMS) message and Customers may use it to reply.

4. Configure the Contact Quotation Alerts setting as described below.

The Mobile Number to which a text (SMS) message will be sent will be chosen as follows—

i.  If the Contact Person quoted in the Attention field in a Quotation has a Mobile Number, the text (SMS) message will be sent to that Mobile Number. The Contact Person must be connected to the Customer in the Contact Relations register (i.e. the name of the Contact Person must appear in the list at the bottom of the window when you are looking at the Contact record for the Customer).

ii.  If the Customer quoted in the Quotation has a Mobile Number, the text (SMS) message will be sent to that Mobile Number.

iii.  If the Contact Person quoted in the Quotation has a Mobile Number, the text (SMS) message will be sent to that Mobile Number. Compared to point (i), this will be a looser search: the search will be by Contact Person name only and the Contact Person will not be connected to the Customer in the Contact Relations register (i.e. there won't be a Contact Relations record connecting the Contact Person and the Customer).

If no Mobile Number has been found after these steps, no text (SMS) message will be sent. Please refer to the 'Customers, Suppliers and Contact Persons' manual for more details about the Contact Relations register.

For the text (SMS) message to be sent successfully, you must have entered the Mobile Number as an international number. You can place + or 00 at the beginning of a number, but + is to be preferred as it is the standard method of signifying international numbers and will not change.

If you have set the SMS Type to "SMS" in the Business Alerts setting, the sending of each text (SMS) message will be completely automatic. Therefore, you will not be given the opportunity to personalise the message. However, if you set the SMS Type to "Suggest", the 'Text SMS: New' window will open when you mark a Quotation as Accepted and save it. This will give you the opportunity to personalise the message. When you click the [Save] button, your Signature will appear in the Person field and the Sent box will be marked automatically, signifying that the message has been sent. If you click the [Cancel] button, the message will not be sent or saved.

The Contact Quotation Alerts setting contains the following options and fields—



**SMS when Quotation Accepted**

Tick this box if you would like an automatic text (SMS) message to be sent to a Customer whenever you mark a Quotation as Accepted and save it.

**Limit**

If you would only like text (SMS) messages to be sent to Customers when you accept Quotations worth more than a certain amount, specify that amount here.

A Customer will receive a message if the TOTAL (i.e. total including VAT) in a Quotation is greater than this figure.

No Currency conversion will take place. So if the Limit is 1000.00 for example, Customers accepting Quotations

worth GBP 1000.01 and USD 1000.01 will both receive messages.

| | | |
|---|---|---|
| **Customer Class.** | **Paste Special** | Contact Classifications setting, CRM module |

If you would only like to send text (SMS) messages to Customers belonging to a particular Contact Classification, specify that Classification here. If you enter a number of Classifications separated by commas, text (SMS) messages will only be sent to Customers featuring all the Classifications listed.

| | | |
|---|---|---|
| **Quote Class** | **Paste Special** | Quotation Classes setting, Quotations module |

If you would only like text (SMS) messages to be sent to the Customers of Quotations with a particular Quotation Class, specify that Class here.

| | | |
|---|---|---|
| **Std. Text** | **Paste Special** | Standard Text register, CRM module |

Specify here the Code of a record in the Standard Text register in the CRM module. This record should contain the text of the message that will be sent to the Customer.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# Contact Reservation Alerts

Whenever you confirm and save a Reservation, a text (SMS) message can be sent automatically to the Customer, to acknowledge that you have received their confirmation. If you want to use this feature, follow these steps—

1.  Sending text (SMS) messages is a chargeable Cloud Service. To use it, ensure you have registered your database using the Automatic Internet Enabler method, as described in the 'Enabler Key' section in the first chapter of the 'Introduction to Enterprise by HansaWorld' manual. Please contact your local HansaWorld representative to sign up for the service and for pricing details.

2.  Open the Business Alerts setting (described above on page 6) and set the SMS Type to "SMS" or "Suggest".

3.  Specify a System Phone No. in the Business Alerts setting or in the Internal System Alerts setting. This number will be used as the source of each text (SMS) message and Customers may use it to reply.

4.  Configure the Contact Reservation Alerts setting as described below.

The Mobile Number to which a text (SMS) message will be sent will be taken from the Contact record for the Reservation Customer. If this Contact record does not have a Mobile Number, no text (SMS) message will be sent.

For the text (SMS) message to be sent successfully, you must have entered the Mobile Number as an international number. You can place + or 00 at the beginning of a number, but + is to be preferred as it is the standard method of signifying international numbers and will not change.

If you have set the SMS Type to "SMS" in the Business Alerts setting, the sending of each text (SMS) message will be completely automatic. Therefore, you will not be given the opportunity to personalise the message. However, if you set the SMS Type to "Suggest", the 'Text SMS: New' window will open when you save a confirmed Reservation. This will give you the opportunity to personalise the message. When you click the [Save] button, your Signature will appear in the Person field and the Sent box will be marked automatically, signifying that the message has been sent. If you click the [Cancel] button, the message will not be sent or saved.

The Contact Reservation Alerts setting contains the following options and fields—
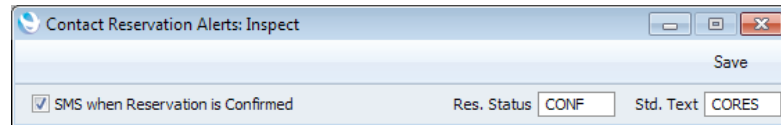


**SMS when Reservation in Confirmed**

Tick this box if you would like an automatic text (SMS) message to be sent to a Customer whenever you confirm and save a Reservation.

**Res. Status**   **Paste Special**   Reservation Status setting, Hotel and Resource Planning modules

Specify here the Reservation Status that you are using to signify that Reservations are confirmed. When you enter this Status in a Reservation and save it, a text (SMS) message will be sent. If you do not specify a Status here, no messages will be sent.

**Std. Text**   **Paste Special**   Standard Text register, CRM module

Specify here the Code of a record in the Standard Text register in the CRM module. This record should contain the text of the message that will be sent to the Customer.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# Cost price variance Alerts

Use this setting if you would like a responsible Person or Persons to be notified every time an attempt is made to approve and save a Goods Receipt in which at least one Item is being received into stock with an unusual cost. The notification will be by Mail and Activity. An unusual cost is a Cost Price in a Goods Receipt row that is greater or less than the Weighted Average of the Item in question by a specified percentage.

If you want to use this feature, follow these steps—

1.   Specify a Responsible Person or Persons in each Location. This Person or Persons will receive the Cost Price Variance Alerts.

2.   Ensure that every Person who will approve and save Goods Receipts has a Mailbox.

3.   Configure the Cost Price Variance Alerts setting as described below.

It is strongly recommended that you use Cost Price Variance Alerts in combination with the 'Disallow Cost Price Variance on Goods Receipt' Access Group Action. If you give Full access to this Action to the Persons who approve and save Goods Receipts, they will not be able to approve a Goods Receipt that contains an unusual cost, as follows—

i.   If a Goods Receipt containing an unusual cost is entered and approved before saving for the first time, saving will be prevented by Full access to the 'Disallow Cost Price Variance on Goods Receipt' Access Group Action. As it is not possible to save the Goods Receipt, no notification Mail or Activity will be created as there will be no Goods Receipt to check. It will be possible to save the Goods Receipt in an unapproved state.

     If the Person entering the Goods Receipt has None access to the 'Disallow Cost Price Variance on Goods Receipt' Action or belongs to an Access Group in which the Action is not listed, the Goods Receipt will be saved and no notifications will be issued.

ii.  If an attempt is made to approve and save an existing Goods Receipt, saving will again be prevented by Full access to the 'Disallow Cost Price Variance on Goods Receipt' Access Group Action. This time, a Mail will be sent to the Responsible Person(s) in the Location, requesting them to check and approve the Goods Receipt. The sender of the Mail will be the Person attempting to approve the Goods Receipt. A To Do Activity will also be created for the Responsible Person(s) in the Location, ensuring the need to check and approve the Goods Receipt appears in their Task Manager as a reminder. The Goods Receipt will be attached to the Mail and the Activity.

     If the Person approving the Goods Receipt has None access to the 'Disallow Cost Price Variance on Goods Receipt' Access Group Action or belongs to an Access Group in which the Action is not listed, the Goods Receipt will be saved, and notifications will be issued.

Access Groups are described in the 'System Module' manual.

If no notification Mail is created when expected, the probable reason is that the Person attempting to approve the Goods Receipt does not have a Mailbox.

The Cost Price Variance Alerts setting contains the following options and fields—
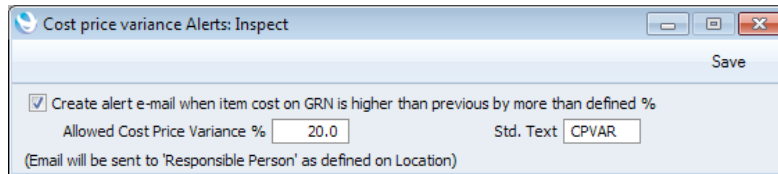


**Create alert e-mail when item cost on GRN is higher than previous by more than defined %**

> Tick this box if you would like a Mail to be sent to the Responsible Person(s) in the relevant Location whenever an attempt is made to approve and save a Goods Receipt in which in which at least one Item is being received with an unusual cost. A To Do Activity for the Responsible Person(s) will always be created, irrespective of whether this box is ticked.

**Allowed Cost Price Variance %**

> Specify here the variance percentage that should trigger the sending of a notification Mail and creation of a notification To Do Activity.

> For example if you enter 50% here, notifications will be sent when a Goods Receipt contains a Cost Price that is more than 50% higher or lower than the Weighted Average of the Item in question.
>
> If you do not enter a percentage, notifications will be sent from every Goods Receipt except those where all Cost Prices are the same as the Weighted Averages of the Items in question.

**Std. Text**      **Paste Special**      Standard Text register, CRM module

> Specify here the Code of a record in the Standard Text register in the CRM module. This record should contain the text of the message that will be included in the notification Mail and To Do Activity.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# Due Report

The Due Report setting allows you to have the Aged version of the Sales Ledger report sent to a Mailbox or Conference every day.

The report will be attached to a Mail, which will be sent from the From System Mailbox specified in the Mail and Conference Settings setting in the E-mail and Conferences module. If Due Report Mails are not placed in the relevant Mailbox or Conference when expected, the probable reason is that you have not specified a From System Mailbox in this setting.

Use the Due Report setting to configure this feature, as follows—
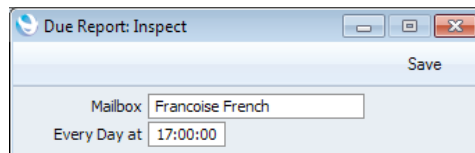


**Mailbox**      **Paste Special**      Mailboxes and Conferences

> Specify here the Mailbox or Conference to which a Due Report Mail is to be sent every day.

**Every Day at**      Specify here the time when a Due Report Mail is to be sent every day to the Mailbox of Conference specified above.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# GP below minimum Alerts

Use this setting if you would like a responsible Person or Persons to be notified every time an attempt is made to approve and save a Sales Invoice or save a Sales Order in which at least one Item is being sold with a gross profit that is less than a specified percentage. The notification will be by Mail and Activity.

If you want to use this feature, follow these steps—

1.  Specify a Responsible Person or Persons in each Location. This Person or Persons will receive the GP Below Minimum Alerts.

2.  Ensure that every Person who will approve and save Sales Orders and Invoices has a Mailbox.

3.  Configure the GP Below Minimum Alerts setting as described below.

It is strongly recommended that you use Cost Price Variance Alerts in combination with the 'Disallow Selling Below Minimum GP' Access Group Action. If you give Full access to this Action to the Persons who approve and save Sales Invoices and those who save Sales Orders, they will not be able to approve an Invoice or save an Order that contains a low gross profit, as follows—

i.   If an Invoice containing a low gross profit is entered and approved before saving for the first time, saving will be prevented by Full access to the 'Disallow Selling Below Minimum GP' Access Group Action. As it is not possible to save the Invoice, no notification Mail or Activity will be created as there will be no Invoice to check. It will be possible to save the Invoice in an unapproved state.

     If the Person entering the Invoice has None access to the 'Disallow Selling Below Minimum GP' Action or belongs to an Access Group in which the Action is not listed, the Invoice will be saved and no notifications will be issued.

ii.  If an attempt is made to approve and save an existing Invoice, saving will again be prevented by Full access to the 'Disallow Selling Below Minimum GP' Access Group Action. This time, a Mail will be sent to the Responsible Person(s) in the Location, requesting them to check and approve the Invoice. The sender of the Mail will be the Person attempting to approve the Invoice. A To Do Activity will also be created for the Responsible Person(s) in the Location, ensuring the need to check and approve the Invoice appears in their Task Manager as a reminder. The Invoice will be attached to the Mail and the Activity.
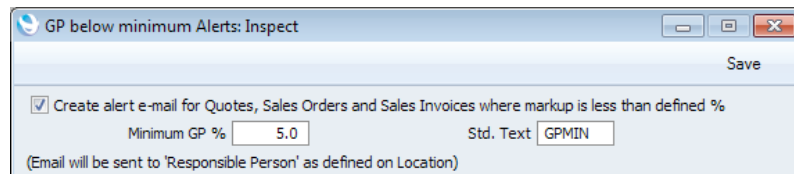
     If the Person approving the Invoice has None access to the 'Disallow Selling Below Minimum GP' Access Group Action or belongs to an Access Group in which the Action is not listed, the Invoice will be saved, and notifications will be issued.

iii. If an attempt is made to save an Order containing a low gross profit for the first time, saving will be prevented by Full access to the 'Disallow Selling Below Minimum GP' Access Group Action. As it is not possible to save the Order, no notification Mail or Activity will be created as there will be no Order to check. It will be possible to save the Invoice in an unapproved state.

     If the Person entering the Order has None access to the 'Disallow Selling Below Minimum GP' Action or belongs to an Access Group in which the

Action is not listed, the Order will be saved and no notifications will be issued.

iv.  If an attempt is made to save an existing Order, saving will again be prevented by Full access to the 'Disallow Selling Below Minimum GP' Access Group Action. This time, a Mail will be sent to the Responsible Person(s) in the Location, requesting them to check the Order. The sender of the Mail will be the Person attempting to approve the Order. A To Do Activity will also be created for the Responsible Person(s) in the Location, ensuring the need to check and approve the Order appears in their Task Manager as a reminder. The Order will be attached to the Mail and the Activity. A new Mail and Activity will be created each time an attempt is made to save the Order.

If the Person approving the Order has None access to the 'Disallow Selling Below Minimum GP' Access Group Action or belongs to an Access Group in which the Action is not listed, the Order will be saved, and notifications will be issued. New notifications will be issued each time the Order is saved.

Access Groups are described in the 'System Module' manual.

If no notification Mail is created when expected, the probable reason is that the Person attempting to approve the Invoice or save the Order does not have a Mailbox.

Notifications will not be sent for Credit Notes, or for Invoices in which the CAE/CAEA field on the 'Identifiers' card contains a value. The CAE/CAEA field is used in Argentina to indicate that an Invoice has been approved by the tax authorities. After receiving this approval, an Invoice cannot be changed.

The GP Below Minimum Alerts setting contains the following options and fields—



**Create alert e-mail for Quotes, Sales Orders and Sales Invoices where markup is less than defined %**

Tick this box if you would like a Mail to be sent to the Responsible Person(s) in the relevant Location whenever an attempt is made to approve and save a Sales Invoice or save a Sales Order in which in which at least one Item is being sold with a low gross profit. A To Do Activity for the Responsible Person(s) will always be created, irrespective of whether this box is ticked.

Although the name of the check box indicates that this feature also applies to Quotations, this is not the case at the time of writing.

**Minimum GP %**

Specify here the gross profit percentage that should trigger the sending of a notification Mail and creation of a notification To Do Activity.

For example if you enter 50% here, notifications will be sent when at least one row in an Invoice or Order contains a gross profit that is less than 50%.

> If you do not enter a percentage, notifications will only be sent from an Invoice or Order where the gross profit of at least one row is negative.

**Std. Text**  **Paste Special**  Standard Text register, CRM module

> Specify here the Code of a record in the Standard Text register in the CRM module. This record should contain the text of the message that will be included in the notification Mail and To Do Activity.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

## Internal Invoice Alerts

Use this setting if you would like a responsible Person to be notified every time a Sales Credit Note is approved and saved. The notification will be by Mail.

If you want to use this feature, you should ensure that every Person who will approve and save Credit Notes has a Mailbox. Whenever a Credit Note is approved, a notification Mail will be sent to the Person specified in this setting. The sender of the Mail will be the Person approving the Credit Note. If no notification Mail is created when expected, the probable reason will be that the Person approving the Credit Note does not have a Mailbox.

The Internal Invoice Alerts setting contains the following options and fields—
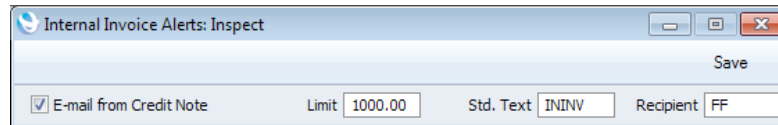


**E-mail from Credit Note**

> Tick this box if you would like an automatic notification Mail to be sent to the Recipient specified below whenever you approve a Credit Note.

**Limit**  If you would only like notification Mails to be sent to the Recipient when you approve Credit Notes worth more than a certain amount, specify that amount here.

> The Recipient will receive a notification Mail if a Credit Note is approved where the TOTAL (i.e. total including VAT) is greater than this figure.

> No Currency conversion will take place. So if the Limit is 1000.00 for example, Credit Notes worth GBP 1000.01 and USD 1000.01 will both trigger Mails.

**Std. Text**  **Paste Special**  Standard Text register, CRM module

> Specify here the Code of a record in the Standard Text register in the CRM module. This record should contain the text of the message that will be included in the notification Mail.

| **Recipient** | **Paste Special** | Person register, System module |
| --- | --- | --- |

Enter the Signature (initials) of the Person to whom notification Mails are to be sent whenever Credit Notes are approved.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# Internal Order Alerts

Whenever you save an Order for the first time, a text (SMS) message can be sent automatically to a responsible Person (i.e. member of staff), informing them that an Order has been received and registered. If you want to use this feature, follow these steps—

1. Sending text (SMS) messages is a chargeable Cloud Service. To use it, ensure you have registered your database using the Automatic Internet Enabler method, as described in the 'Enabler Key' section in the first chapter of the 'Introduction to Enterprise by HansaWorld' manual. Please contact your local HansaWorld representative to sign up for the service and for pricing details.

2. Open the Business Alerts setting (described above on page 6) and set the SMS Type to "SMS" or "Suggest".

3. Specify a System Phone No. in the Business Alerts setting or in the Internal System Alerts setting. This number will be used as the source of each text (SMS) message.

4. Configure the Internal Order Alerts setting as described below.

You should specify the Recipient (i.e. the responsible Person to whom the text (SMS) messages will be sent) in the Internal Order Alerts setting. Messages will be sent to the Recipient's Mobile Number, chosen as follows—

i. If the Recipient has a Contact record in which there is a Mobile Number, the text (SMS) message will be sent to that Mobile Number. The Recipient's record in the Contact register is the one quoted in the Contact Code field on the 'Access' card of their Person record.

ii. If the Recipient does not have a record in the Contact register, or this record does not have a Mobile Number, it will be taken from the Phone 1 or Phone 2 fields (in that order) in their Person record.

If no Mobile Number has been found after these steps, no text (SMS) message will be sent.

For the text (SMS) message to be sent successfully, you must have entered the Mobile Number as an international number. You can place + or 00 at the beginning of a number, but + is to be preferred as it is the standard method of signifying international numbers and will not change.

If you have set the SMS Type to "SMS" in the Business Alerts setting, the sending of each text (SMS) message will be completely automatic. Therefore, you will not be given the opportunity to personalise the message. However, if you set the SMS Type to "Suggest", the 'Text SMS: New' window will open when you save an Order. This will give you the opportunity to personalise the message (e.g. to specify a delivery time). When you click the [Save] button, your Signature will appear in the Person field and the Sent box will be marked automatically,

signifying that the message has been sent. If you click the [Cancel] button, the message will not be sent or saved.

The Internal Order Alerts setting contains the following options and fields—



| SMS from Order | Tick this box if you would like an automatic text (SMS) message to be sent to the Recipient specified below whenever you save an Order for the first time. |
|---|---|
| Limit | If you would only like text (SMS) messages to be sent to the Recipient when Customers place Orders worth more than a certain amount, specify that amount here. |

The Recipient will receive a message if an Order is placed where the TOTAL (i.e. total including VAT) is greater than this figure.

No Currency conversion will take place. So if the Limit is 1000.00 for example, Orders worth GBP 1000.01 and USD 1000.01 will both trigger messages.

Remember that a message will only be sent from an Order when it is saved for the first time. Therefore, if you set a Limit and are in the habit of saving Orders as you add Items to them, be aware that a message will not be sent if you save an Order before its TOTAL has reached the Limit.

**Customer Class.** **Paste Special**      Contact Classifications setting, CRM module

If you would only like to send text (SMS) messages when Orders are placed by Customers belonging to a particular Contact Classification, specify that Classification here. If you enter a number of Classifications separated by commas, text (SMS) messages will only be sent when Orders are placed by Customers featuring all the Classifications listed.

**GP Limit**      If you would only like a text (SMS) message to be sent to the Recipient when an Order is entered with a Total GP that is less than a certain amount, specify that amount here.

Remember that a message will only be sent from an Order when it is saved for the first time. Therefore, if you set a GP Limit and are in the habit of saving Orders as you add Items to them, be aware that a message might be sent if you save an Order before its Total GP has reached the GP Limit.

**Order Class** **Paste Special**      Order Classes setting, Sales Orders module

If you would only like text (SMS) messages to be sent when Orders with a particular Order Class are placed, specify that Class here.

| Std. Text | Paste Special | Standard Text register, CRM module |
|---|---|---|

Specify here the Code of a record in the Standard Text register in the CRM module. This record should contain the text of the message that will be sent to the Recipient.

| Recipient | Paste Special | Person register, System module |
|---|---|---|

Enter the Signature (initials) of the Person to whom text (SMS) messages are to be sent whenever Orders are placed.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.
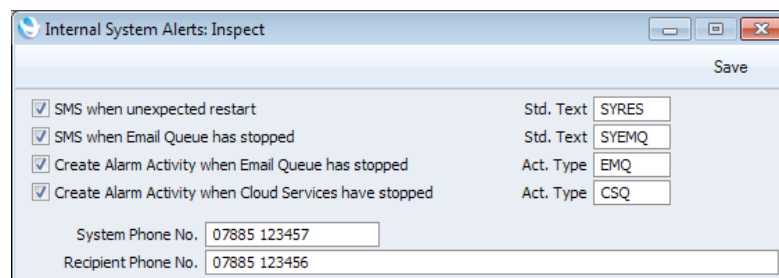
# Internal Quotation Alerts

Whenever you mark a Quotation as Accepted and save it, a text (SMS) message can be sent automatically to a responsible Person (i.e. a member of staff), informing them that a Quotation has been accepted. If you want to use this feature, follow these steps—

1. Sending text (SMS) messages is a chargeable Cloud Service. To use it, ensure you have registered your database using the Automatic Internet Enabler method, as described in the 'Enabler Key' section in the first chapter of the 'Introduction to Enterprise by HansaWorld' manual. Please contact your local HansaWorld representative to sign up for the service and for pricing details.

2. Open the Business Alerts setting (described above on page 6) and set the SMS Type to "SMS" or "Suggest".

3. Specify a System Phone No. in the Business Alerts setting or in the Internal System Alerts setting. This number will be used as the source of each text (SMS) message and Customers may use it to reply.

4. Configure the Internal Quotation Alerts setting as described below.

You should specify the Recipient (i.e. the responsible Person to whom the text (SMS) messages will be sent in the Internal Quotation Alerts setting. Messages will be sent to the Recipient's Mobile Number, chosen as follows—

i. If the Recipient has a Contact record in which there is a Mobile Number, the text (SMS) message will be sent to that Mobile Number. The Recipient's record in the Contact register is the one quoted in the Contact Code field on the 'Access' card of their Person record.

ii. If the Recipient does not have a record in the Contact register, or this record does not have a Mobile Number, it will be taken from the Phone 1 or Phone 2 fields (in that order) in their Person record.

If no Mobile Number has been found after these steps, no text (SMS) message will be sent.

For the text (SMS) message to be sent successfully, you must have entered the Mobile Number as an international number. You can place + or 00 at the beginning of a number, but + is to be preferred as it is the standard method of signifying international numbers and will not change.

If you have set the SMS Type to "SMS" in the Business Alerts setting, the sending of each text (SMS) message will be completely automatic. Therefore, you will not be given the opportunity to personalise the message. However, if you set the SMS Type to "Suggest", the 'Text SMS: New' window will open when you mark a Quotation as Accepted and save it. This will give you the opportunity to personalise the message. When you click the [Save] button, your Signature will appear in the Person field and the Sent box will be marked automatically, signifying that the message has been sent. If you click the [Cancel] button, the message will not be sent or saved.

The Internal Quotation Alerts setting contains the following options and fields—



**SMS when Quotation Accepted**

Tick this box if you would like an automatic text (SMS) message to be sent to the Recipient specified below whenever you mark a Quotation as Accepted and save it.

**Limit**                    If you would only like text (SMS) messages to be sent to the Recipient when you accept Quotations worth more than a certain amount, specify that amount here.

The Recipient will receive a message if the TOTAL (i.e. total including VAT) in a Quotation is greater than this figure.

No Currency conversion will take place. So if the Limit is 1000.00 for example, Quotations worth GBP 1000.01 and USD 1000.01 will both trigger messages.

**Customer Class.**    **Paste Special**        Contact Classifications setting, CRM module

If you would only like to send text (SMS) messages when Quotations are accepted by Customers belonging to a particular Contact Classification, specify that Classification here. If you enter a number of Classifications separated by commas, text (SMS) messages will only be sent when Quotations are accepted by Customers featuring all the Classifications listed.

**GP Limit**                If you would only like a text (SMS) message to be sent to the Recipient when a Quotation is accepted with a Total GP that is less than a certain amount, specify that amount here.

**Quote Class**        **Paste Special**        Quotation Classes setting, Quotations module

If you would only like text (SMS) messages to be sent when Quotations with a particular Quotation Class are accepted, specify that Class here.

**Std. Text**            **Paste Special**        Standard Text register, CRM module

Specify here the Code of a record in the Standard Text register in the CRM module. This record should contain the text of the message that will be sent to the Recipient.

| **Recipient** | **Paste Special** | Person register, System module |
|---|---|---|

Enter the Signature (initials) of the Person to whom text (SMS) messages are to be sent whenever Quotations are accepted.

If you do not enter a Recipient here, the text (SMS) message will be sent to the Salesman specified in a Quotation when it is accepted.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# Internal System Alerts

Use the Internal System Alerts setting if you would like to be notified when certain database events occur. Depending on the database event, notification will be by text (SMS) message or Activity.

Sending text (SMS) messages is a chargeable Cloud Service. To use it, ensure you have registered your database using the Automatic Internet Enabler method, as described in the 'Enabler Key' section in the first chapter of the 'Introduction to Enterprise by HansaWorld' manual. Please contact your local HansaWorld representative to sign up for the service and for pricing details.

If you have more than one Company in your database, bear in mind that the Internal System Alerts setting is stored in Company 0, a partition of the database that stores information available in every Company. This means that the setting is used by all Companies, that any change you make in this setting will immediately be available to all Companies, and it doesn't matter in which Company you are working when you need to edit the setting.

The Internal System Alerts setting contains the following options and fields—



**SMS when unexpected restart, Std. Text**

| **Paste Special** | Standard Text register, CRM module |
|---|---|

Use this option if you would like to be notified by text (SMS) message each time the server restarts unexpectedly.

An unexpected restart will occur after the server closed in an improper way (e.g. it crashed or was force quit). Such a restart will be marked by the comment "Last session was not properly terminated" appearing the log.

The notification will take the form of a text (SMS) message being sent to the Recipient Phone No. specified below. The source of the message will be the System Phone No., also specified below.

The message will consist of the text "Program not properly Terminated", plus the text in the record in the Standard Text register in the CRM module that you can optionally specify in the Std. Text field.

**SMS when Email Queue has stopped, Std. Text**

**Paste Special**          Standard Text register, CRM module

Use this option if you would like to be notified by text (SMS) message each time the E-mail Queue stops.

The E-mail Queue contains external mail that is waiting to be sent to the relevant destination. External mail is Mail in which at least one recipient is an e-mail address containing the @ character. If you need to check the contents of the E-mail Queue, you can do so by opening the E-mail Queue register in the E-mail and Conferences module.

If you use this option, the E-Mail Queue will be checked every five minutes. If the Queue contains an unsent Mail that has been waiting for at least two minutes, the Queue will be deemed to have stopped and the notification will be issued.

The notification will take the form of a text (SMS) message being sent to the Recipient Phone No. specified below. The source of the message will be the System Phone No., also specified below.

The message will consist of the text "E-mail Queue has stopped", plus the text in the record in the Standard Text register in the CRM module that you can optionally specify in the Std. Text field.

**Create Alarm Activity when Email Queue has stopped, Act. Type**

**Paste Special**          Activity Types setting, CRM module

Use this option if you would like the Postmaster to be notified by message each time the E-mail Queue stops.

As with the previous option, the E-Mail Queue will be checked every five minutes. If the Queue contains an unsent Mail that has been waiting for at least two minutes, the Queue will be deemed to have stopped and the notification will be issued.

The notification will take the form of an Alarm Activity being created in the name of the Postmaster. The Alarm Type in the Activity will be Message, meaning that a message will appear on the Postmaster's screen, containing the phrase "E-mail Queue has stopped" and an [Open Activity] button that they can use to open the Activity. If the Postmaster is not logged in at the relevant time, they will be shown the message the next time they log in.

The name of the Postmaster will be taken from the Mail and Conference Settings setting in the E-mail and Conferences module: no Activity will be created if you have not specified a Postmaster.

**Create Alarm Activity when Cloud Services have stopped, Act. Type**

> **Paste Special**      Activity Types setting, CRM module
>
> Use this option if you would like the Postmaster to be notified by message each time Cloud Services stop.
>
> The following Cloud Services will be monitored by this option: Sending Electronic Invoices, Receiving Electronic Invoices, Sending Electronic VAT Declarations, Sending Electronic Payments and Sending Direct Debits.
>
> These Cloud Services will be checked every five minutes. If the Electronic Data Exchange Stopped box in the Electronic Invoice Settings setting in the System module is ticked or if there is an unprocessed Cloud Service task, Cloud Services will be deemed to have stopped and the notification will be issued.
>
> The notification will take the form of an Alarm Activity being created in the name of the Postmaster. The Alarm Type in the Activity will be Message, meaning that a message will appear on the Postmaster's screen, containing the phrase "Cloud Service has stopped" and an [Open Activity] button that they can use to open the Activity. If only one Cloud Service has stopped (i.e. if the Electronic Data Exchange Stopped box is not ticked, but there is an unprocessed Cloud Service task), the message will include the name of the Cloud Service that has stopped. If the Postmaster is not logged in at the relevant time, they will be shown the message the next time they log in.
>
> The name of the Postmaster will be taken from the Mail and Conference Settings setting in the E-mail and Conferences module: no Activity will be created if you have not specified a Postmaster.

**System Phone No.**   Enter the source phone number from which notification text (SMS) messages are to be sent.

**Recipient Phone No.**

> Enter the phone number to which notification text (SMS) messages are to be sent.

When you have finished working with this setting, click the [Save] button in the Button Bar to save the changes and close the window. To close the window without saving changes, click the close box.

# Approval Rules

In larger organisations, higher value transactions need to pass through an approval process before they can be proceeded with. Depending on the value of a particular transaction, it might need to be approved by a single person, or it might need to be sent to a higher level for approval.

The Approval Rules register allows you to set up such a system. Transactions in the following registers can be made subject to Approval Rules—

- Expenses

- Goods Receipts

- Internal Orders

- Leave Applications

- Leave Transfers

- Payments

- Project Budgets

- Purchase Invoices

- Purchase Orders

- Quotations

- Sales Invoices

- Sales Orders

- Stock Depreciations

# Example

The basis of the approval process is the Activity register. When a member of staff enters a transaction that needs to pass through the approval process, they will save it and then choose 'Send for Approval' from the Operations menu. This will cause an Activity to be created for the Person(s) who will approve the transaction (the "Approval Persons"). After checking the transaction, the Approval Person(s) will enter a specified Result in their Activity and mark it as Done. Depending on the Result, this will cause the transaction to be approved or rejected.

This example uses Purchase Orders to illustrate the approval process. Follow these steps—

1.  Enter an Approval Rules record similar to that illustrated below to control the process—



The illustration shows the header of the Approval Rules record together with the 'Activity Types' card. Use the fields and options as follows—

-   Set the Register field to "Purchase Orders", to signify that the Approval Rules record applies to the Purchase Order register.

-   Use the two fields under the Request Details heading to specify the Activity Type and Text that will appear in all Approval Request Activities (the Activities that will be created for the Approval Person(s), notifying them that there is a new Purchase Order awaiting approval).

-   Use the fields under the Result Activity Types heading to specify the Activity Types that the Approval Person(s) should enter in the Result field of each Approval Request Activity, depending on whether they approve or reject a particular Purchase Order.

Use the 'Rules' card of the same Approval Rules record to specify when approval will be needed and who will do it—
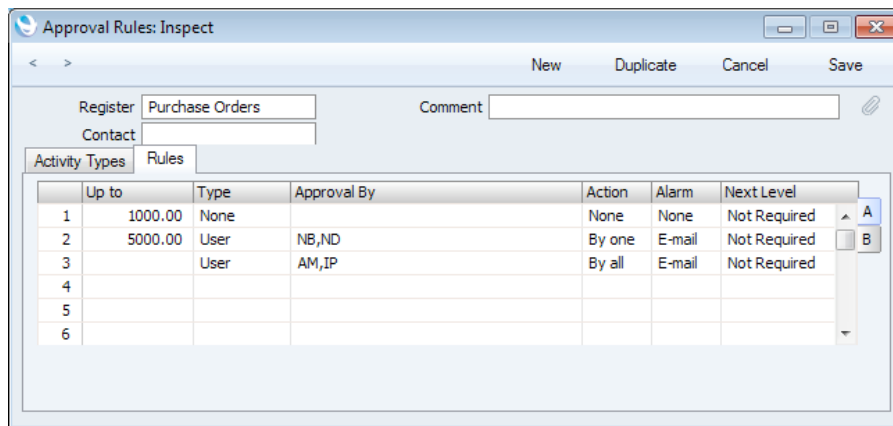


In the illustration, the matrix contains three rows. Each row contains a separate Approval Rule. One of these Approval Rules will be applied to each Purchase Order, depending on the value of the Purchase Order.

- In the first row in this example, Up To is 1000.00 and the Action is "None". This row signifies that Purchase Orders up to a value of 1000.00 will not be subject to the approval process.

- In the second row, Up To is 5000.00. This signifies that it will be applied to Purchase Orders valued between 1000.01 and 5000.00. As the Action is not "None", these Purchase Orders will be subject to some form of approval process. More precisely, the Approval By field contains two Persons (NB and ND), and the Action is "By one". Together, these fields mean that each Purchase Order will need to be approved by one of these two Persons.

- In the third row, Up To is blank and so applies to Purchase Orders valued 5000.00 or more. The Approval By field again contains two Persons (AM and IP), but this time the Action is "By all". Both Persons must approve each Purchase Order.

2. Create two records in the Activity Consequences setting in the CRM module, as illustrated below—
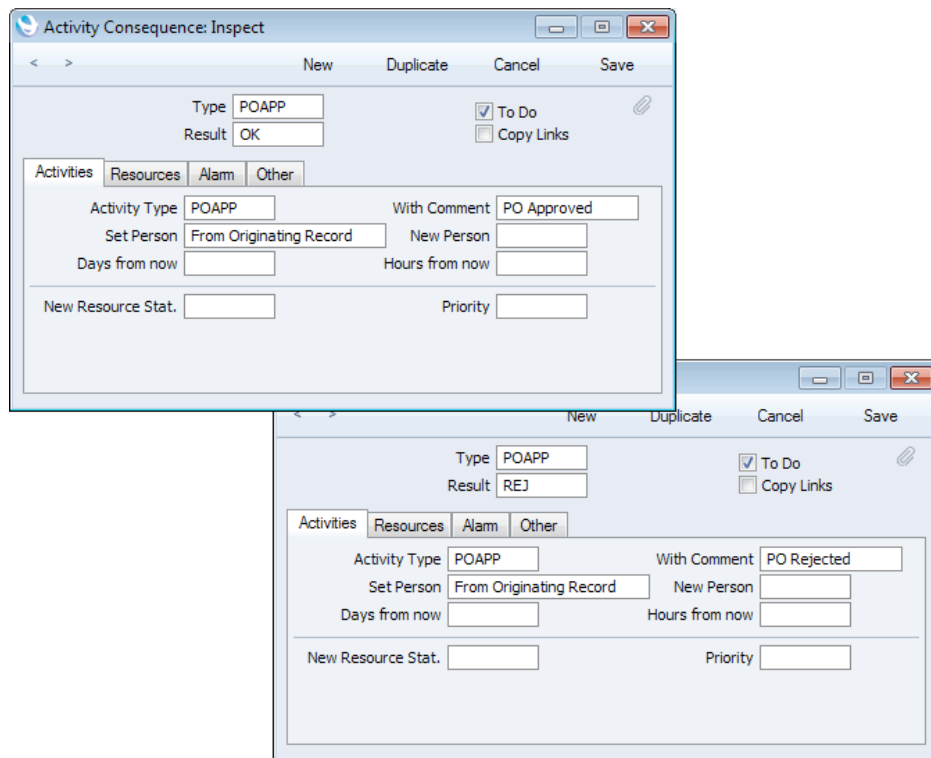


In the first record, the Type and Result in the header are the Request Activity Type and Approved Result Activity Type from the Approval Rules record. The new Activity Type (on the 'Activities' card) is also the Request Activity Type, and Set Person is "From Originating Record". The To Do box is checked. The second record is similar, but the Result in the header is the Rejected Result Activity Type from the Approval Rules record.

When an Approval Person approves or rejects a transaction (e.g. a Purchase Order), these Activity Consequence records will ensure that an Activity will be created for the Person who originally created the transaction, notifying them that it has been approved or rejected. If you specify Alarm details on the 'Alarm' card of the Activity Consequence record, the Person who originally created the transaction will receive an Alarm (i.e. message, text (SMS) message or Mail) as well.

3. When you enter and save a low value Purchase Order (i.e. one where the Total including VAT is 1000.00 or less), the Approval Status on the 'Ord. Address' card will be set to Not Required—



As the Purchase Order does not need to pass through the approval process, you will be able to print it, send it by email, mark it as OK and create a Goods Receipt from it immediately.

4. When you enter and save a medium value Purchase Order (where the Total including VAT is between 1000.01 and 5000.00), the Approval Status will be set to Not Requested—



You will not be able to carry out operations such as printing the Purchase Order, sending it by email, marking it as OK or creating a Goods Receipt from it. Any attempt to do so will cause the message "Not Approved yet" to appear.
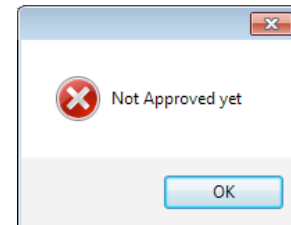


5. To begin the approval process, choose 'Send for Approval' from the Operations menu. This will have the following consequences—

• The Approval Status of the Purchase Order will be set to Pending.

• You will no longer be able to make any changes to the Purchase Order.

• Separate Approval Request Activities will be created for each Approval Person (i.e. for each Person listed in the Approval By field in the relevant row in the Approval Rules record for the value of the Purchase Order). In this case, Approval Request Activities will be created for NB and ND), as shown overleaf.

If so specified in the Alarm field in the relevant row in the Approval Rules record, the Activities will cause Alarms to be created for each Approval Person, to bring the new Purchase Order to their attention. In this example, Mails will be created for NB and ND—



The Task Type in these Activities will be To Do, meaning they will be placed in NB's and ND's Task Managers. The Purchase Order will be

attached to each Activity, allowing NB and ND to check it easily. The Activities will also be attached to the Purchase Order.

6.  If the Approval Persons do not deal with the Purchase Order immediately, their Task Managers will open each time they log in, to provide a reminder that there is a transaction awaiting approval—
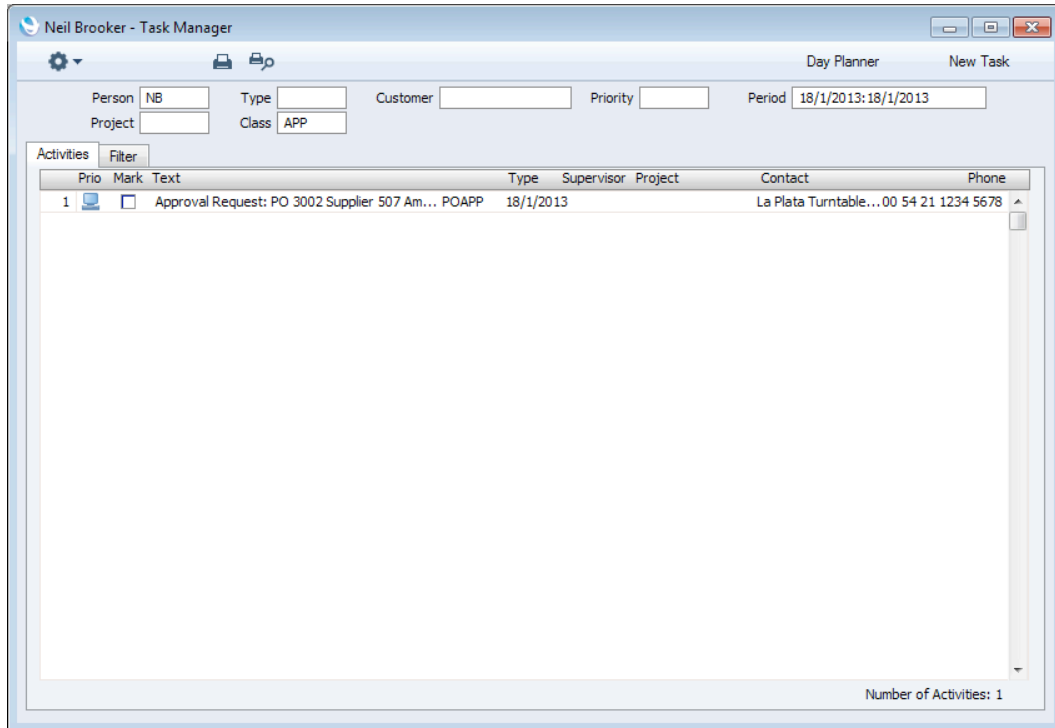
7. Task Managers are usually open to everybody, so any member of staff could update Approval Request Activities, thus approving transactions. It is therefore recommended that you use the Task Manager Access setting in the System module to restrict access to the Task Managers of Approval Persons. In the example illustrated below, ML will be able to read NB's tasks but not change them, while JM will not be able to see them at all (NB's Task Manager will be empty when opened by JM)—
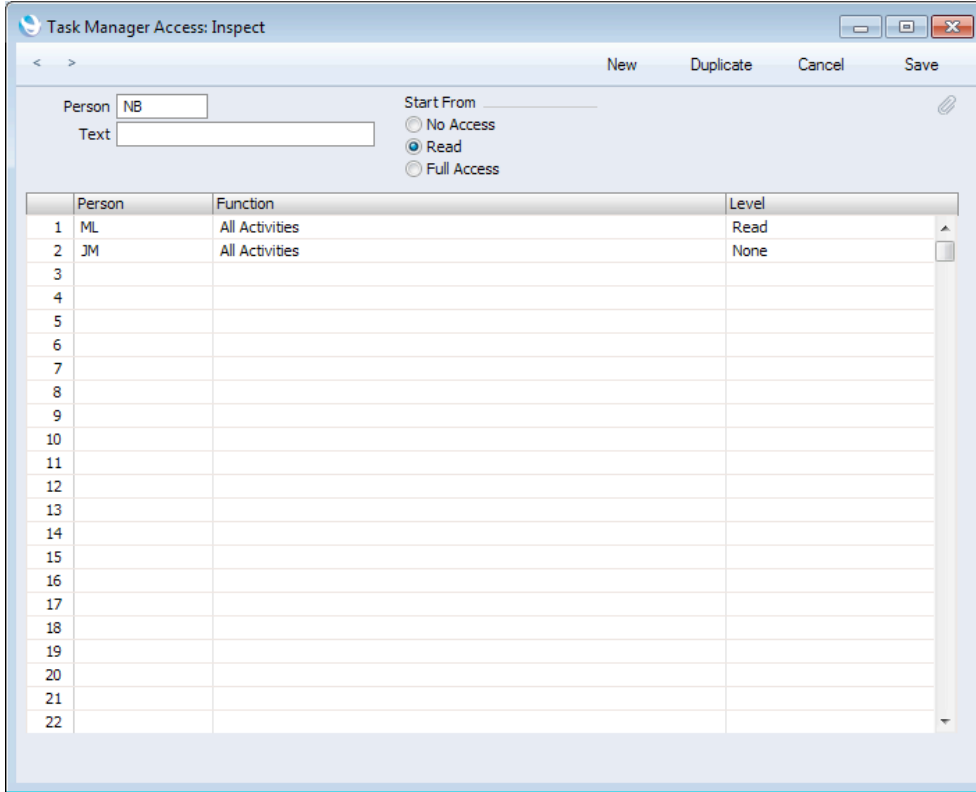


Similarly, ML will be able to open NB's tasks when they are attached to other records but not change them, while JM will not be able to open them.

It might be useful to grant read access (as given to ML in this example) to Persons likely to create Purchase Orders, so they can keep track of how Approval Request Activities are progressing.

8. At any time, you can check the progress of the approval process of a particular Purchase Order by opening it and choosing 'Purchase Order Status' from the Operations menu. A report will be printed to screen in which there will be a section detailing the approval process—



9. Because the approval process has started, you can no longer modify the Purchase Order. So, if you now realise the Purchase Order contains an error, you must cancel the approval process before you can correct the error. To do this, open the Purchase Order and choose 'Cancel Approval Request' from the Operations menu. You will now be able to amend the Purchase Order and then restart the approval process by once again choosing 'Send for Approval' from the Operations menu.

Cancelling the approval process is not always possible. If you want to allow it, you must use the Allow Cancelling Approval Request option and specify a Cancelled Result Activity Type in the Approval Rules record (as shown in step 1). Also, you cannot cancel the approval process if step 10 has already taken place (i.e. if at least one Approval Person has approved their Approval Request Activity).

10. As the example Purchase Order falls in the medium value range, it can be approved or rejected by NB or ND. Only one of them needs to make the decision. To do this, one of them opens their Approval Request Activity and enters the Approved or Rejected Result Activity Type (as specified in the Approval Rules record) in the Result field and marks it as Done—



Saving the Activity will have the following consequences—

- The Approval Status in the Purchase Order will be set to Approved or Rejected.

- The Not Needed Result Activity Type from the relevant Approval Rules record will be copied to all other Approval Request Activities connected to the Purchase Order, and these Activities will also be marked as Done.

- If you created Activity Consequence records as described in step 2, an Activity will be created in your name as the creator of the Purchase Order, informing you that it has been approved or rejected. The Purchase Order will be attached to the Activity, so you will be able to return to it easily. If so specified in the Activity Consequence record, you will receive an Alarm as well.

Because the Activity Type in this Activity will be the Request Activity Type from the Approval Rules record and because the Activity Consequence will set the Task Type to To Do, this Activity will cause your Task Manager to open each time you log in, until you enter a Result and mark it as Done. It is recommended that you enter the Not Needed Result Activity Type from the relevant Approval Rules record as the Result. Entering the Approved or Rejected Result Activity Types will invoke the Activity Consequence once again, causing another Activity to be created.

11. If the Approval Status in the Purchase Order was set to Approved, you will now be able to print the Purchase Order, send it by email, mark it as OK and create a Goods Receipt from it.

12. When you enter and save a high value Purchase Order (where the Total including VAT is 5000.01 or more), the approval process is broadly as described in steps 4-10 above. The only difference will be that such Purchase Orders must be approved by both Approval Persons (in the example, AM and IP). The Approval Status in the Purchase Order will change to Approved when the last Person approves their Approval Request Activity. If one Person rejects their Approval Request Activity, no action by the others will be needed.

13. To implement a two-stage approval process, change the Approval Rules record as shown below—



In this example, the third row specifies that Purchase Orders with a value greater than 5000.00 must be approved by NB and ND. The Next Level in this row is "Required", signifying that after this approval, such Purchase Orders will be escalated to a second stage in the approval process. This second stage is described in the fourth row of the grid: in this case, it requires approval by AM and IP.

14. If you did not do so in step 2, you should now create a record in the Activity Consequences setting in the CRM module as follows—



15. When you enter and save a high value Purchase Order (where the Total including VAT is 5000.01 or more), the approval process will again be broadly as described in steps 4-10 above.

When you select 'Send for Approval', Approval Request Activities will be created for NB and ND. In this example, the Approval Action is 'By all', so both NB and ND must approve their Approval Request Activities. When the second Person does so, the "Required" Next Level and the Activity Consequence will combine to cause two more Approval Request Activities to be created for AM and IP. Again, the Approval Action is 'By all', so they must both approve their Approval Request Activities in order for the Approval Status of the Purchase Order to change to Approved.

16. So far in the example, separate Approval Request Activities will be created for every Approval Person. You can change this so that you will need to choose Approval Persons every time you use the 'Send for Approval' function. To make this change, open the Approval Rules record and go to flip B of the 'Rules' card—
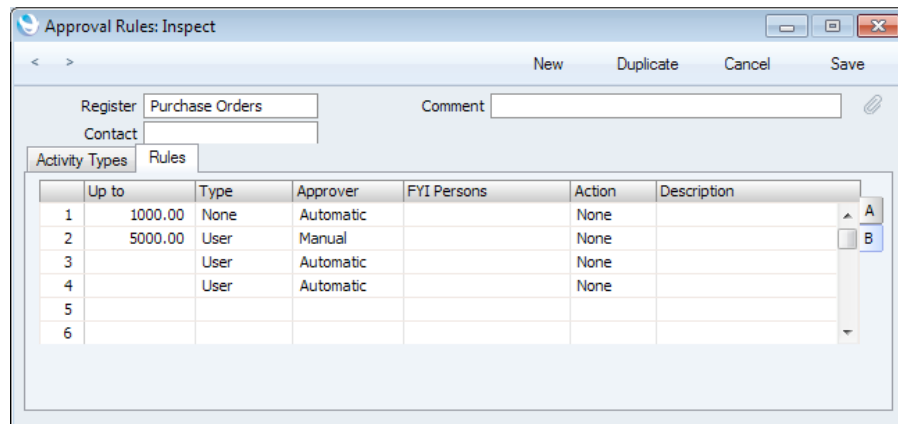


In this example, Approver has been changed to "Manual" in the second row. The Approval Persons on flip A are still NB and ND.

Now when you enter a Purchase Order up to the value of 5000.00 and choose 'Send for Approval', the 'Select Approver' window will open—
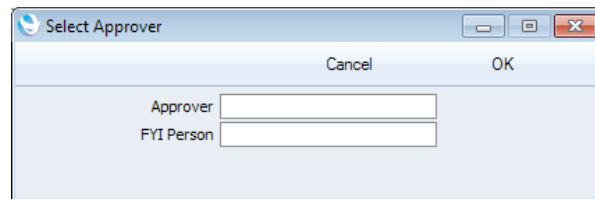


Here you can choose Approval Persons by opening 'Paste Special—
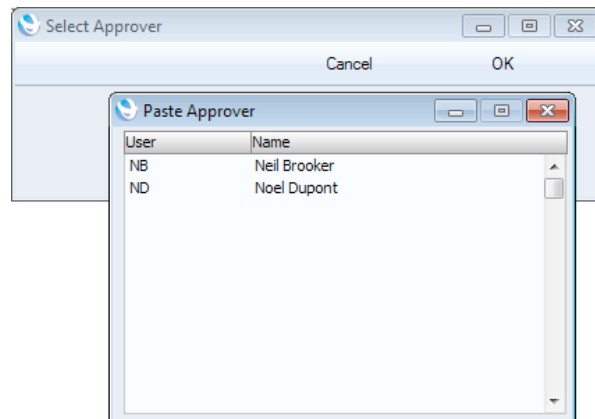


The 'Paste Special' list only contains the Persons listed in the Approval By field on flip A of the Approval Rules record. Choose as many as you need, and separate them with commas—
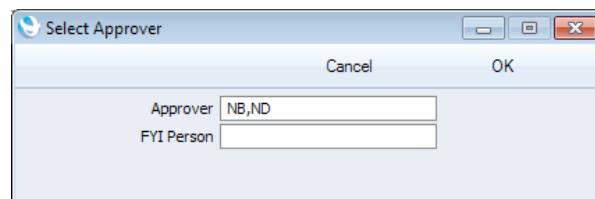
You will not be able to proceed if you try to enter the Signature of someone who is not listed in the Approval By field. When you click [OK], separate Approval Request Activities will be created for the Persons you have chosen.

If one of those Persons cannot complete their approval task, they can open their Approval Request Activity, enter the Forwarded Activity Type specified in the Approval Rules record, mark the Activity as Done and save it. On saving, the 'Select Approver' window will open, allowing them to specify the Person who should carry out the task. 'Paste Special' will again list the Persons listed in the Approval By field on flip A of the Approval Rules record, but with the forwarding Person omitted.

In a multi-stage approval process, if the next level is "Manual", each Approval Person on the current level will be asked to choose Persons for the next level when they approve their Activity. Approval Request Activities will be created for the chosen Persons.

## Entering an Approval Rules record

To enter a new record in the Approval Rules register, first ensure you are in the Business Alerts module and then click the [Approval Rules] button in the Master Control panel. The 'Approval Rules: Browse' window is opened, showing the Approval Rules records already entered.
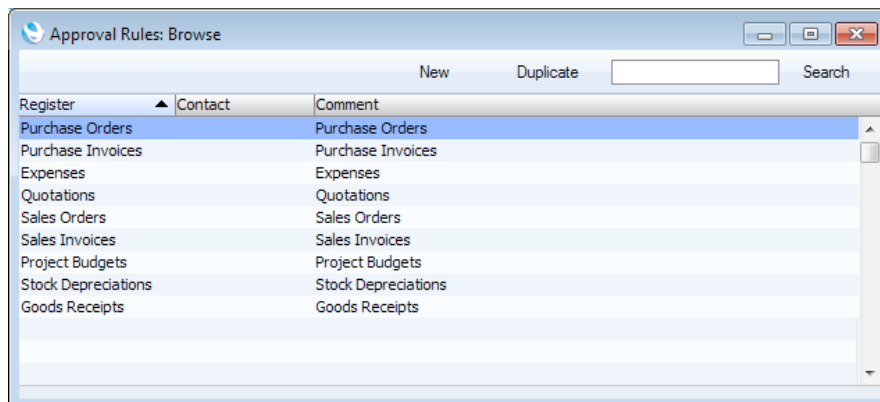


As in all browse windows you may sort the list by clicking on the column headings. To reverse any sort, simply click once again on the column heading. You can also scroll the list with the scroll bars. Finally, you can search for a record by entering a keyword in the field in the top right-hand corner. When you press the Return or Enter key, the first record with a match for the keyword in the current sort column will be highlighted.

To enter a new Approval Rules record, click [New] in the Button Bar or use the Ctrl-N (Windows and Linux) or ⌘-N (Mac OS X) keyboard shortcut. Alternatively, highlight an Approval Rules record similar to the one you want to enter and click [Duplicate] on the Button Bar.

The 'Approval Rules: New' window is opened, empty if you clicked [New] or containing a duplicate of the highlighted Approval Rules record.
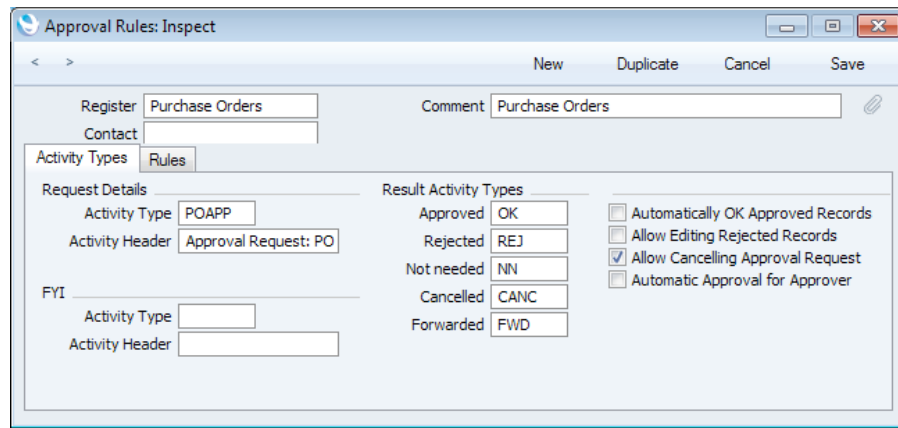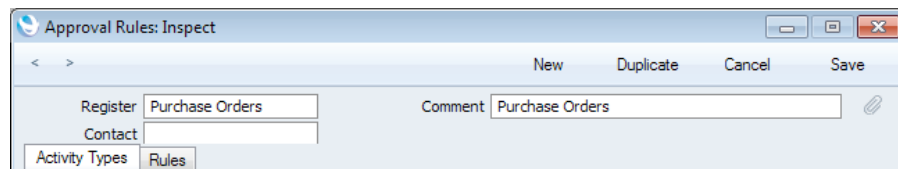
When the Approval Rules record is complete, click the [Save] button to save it. As soon as you save an Approval Rules record for the first time, it will be activated. Records in the register in question that are saved after that moment will be subject to the approval process. Records saved before that moment will not be subject to the approval process. You will need to save each one again so that their Approval Status changes from Not Required to Not Requested, thus making them subject to the approval process.

Since the amount of information stored in each Approval Rules record will not fit on a single screen, the Approval Rules window has been divided into two cards. At the top of each is the header. There are two named buttons ('tabs') in the header.



By clicking the tabs you can navigate between cards. The header is always visible, as a reminder of the Approval Rules record you are working with.

## Header



| | | |
|---|---|---|
| **Register** | **Paste Special** | Choices of possible entries |

Using 'Paste Special', choose the register to which the Approval Rules record is to apply.

In the case of Sales Invoices, you should create separate Approval Rules records for Cash Notes (Invoices with a "Cash" Payment Term), Credit Notes and all other Invoices. If you do not create a record for Cash Notes, for example, the Rule for Invoices will not be used in its place.

| | | |
|---|---|---|
| **Comment** | | Any Comment that you enter here will be shown in the 'Approval Rules: Browse' window. |

| | | |
|---|---|---|
| **Contact** | **Paste Special** | Customers, Suppliers and Contact Persons in Contact register |

Use this field if you would like different approval processes to be followed depending on the Customer or Supplier.

For example, you can create one Approval Rules record for Purchase Orders issued to Supplier 507, and a second Approval Rules record for Purchase Orders in which this field is empty, to be used for all other Suppliers.

## Activity Types Card



**Request Details - Activity Type**

|  |  |
|---|---|
| **Paste Special** | Activity Types setting, CRM module |

The approval process will begin when a member of staff creates a record in the Register specified above and then selects 'Send for Approval' from the Operations menu. This will cause separate Activities to be created for each Person listed in the Approval By field in the matrix on the 'Rules' card (described below on page 47). These Activities are the basis of the approval process and are known as "Approval Request Activities'.

Specify here the Activity Type that you want to be used in Approval Request Activities.

If an Approval Person has any open Activities with the Activity Type specified here, their Task Manager will open automatically each time they log in, to remind them that there are transactions that need approving. Therefore, you may want to specify an Activity Type here that is not used for any other purpose, otherwise Task Managers will frequently open on logging in.

**Request Details - Activity Header**

Specify here the text that you want to be copied to the Text field in the header of Approval Request Activities.

It is recommended that this text should be quite short. The Text field in Activities can contain sixty characters, and other information in addition to this text will be copied there. For example, in Approval Request Activities created from Purchase Orders, this text will be followed by the Purchase Order Number, the Supplier Number, the value and the Currency, together with identifiers for those pieces of information.

There is no need to add a trailing space to this text: one will be added automatically.

**FYI**    When Approval Request Activities are created, additional Activities can also be created for Persons who need to know that the approval process has started, but who will

not play any part in that process. These Activities are known as "FYI Activities" ("For Your Information" Activities).

Specify here the Activity Type and text that you want to be used in these Activities.

**Result Activity Types**

|  |  |
|---|---|
| **Paste Special** | Activity Types setting, CRM module |

Specify here the Activity Types that are to be used as Results in Approval Request Activities. It will not be possible to use any other Activity Types as Results in these Activities.

**Approved**
Specify here the Activity Type that an Approval Person will enter as a Result in order to approve a transaction in the Register specified above.

**Rejected**
Specify here the Activity Type that an Approval Person will enter as a Result in order to reject a transaction in the Register specified above.

**Not needed**
If you have listed several Persons in the Approval By field in the matrix on the 'Rules' card, separate Approval Request Activities will be created for each Person. However, if the Approval Action is "By one", only one of those Persons needs to approve or reject a particular transaction, and so the other Persons' Approval Request Activities for that transaction become redundant (rejection is always on a "By one" basis). This Activity Type will be copied to the Result field of the redundant Activities and they will be marked as Done automatically, thus removing them from the approval process.

**Cancelled**
If you are using the Allow Cancelling Approval Request option described below, it will be possible to cancel the approval process for a particular transaction, providing that no Approval Request Activities have been approved or rejected.

To cancel the approval process, open the relevant transaction (e.g. the relevant Purchase Order) and choose 'Cancel Approval Request' from the Operations menu. This will cause this Cancelled Activity Type to be copied to the Result field in all Approval Request Activities, which will also be marked as Done. They will thus be cancelled and removed from the approval process. The Approval Status of the transaction will be changed to Not Requested.

**Forwarded**
When you begin the approval process by selecting 'Send for Approval' from the Operations menu of a transaction, Approval Request Activities will usually be created for every Approval Person ("automatic" selection of Approval Persons). It is possible to change this process so that you will need to choose Approval Persons manually each time you use the 'Send for Approval' function ("manual"

selection of Approval Persons). Please refer to the description below on page 49 of the Approver field on flip B of the 'Rules' card for details.

If you are using manual selection of Approval Persons, you may from time to time create an Approval Request Activity for someone who is unable to proceed with the approval request. This Person should enter this Forwarded Activity Type in the Result field of their Approval Request Activity and mark it as Done. On saving, they will be asked to specify another Approval Person.

If you are using automatic selection of Approval Persons, it will not be possible to enter this Forwarded Activity Type in the Result field of Approval Request Activities. With automatic selection, every Approval Person will already have an Approval Request Activity, and therefore there will be no other authorised Person to whom Activities can be forwarded.

To use the forwarding feature, you must also create a record in the Activity Consequences setting in the CRM module. In this record, the Type and Result in the header should be the Request Activity Type and Forwarded Result Activity Type respectively. The new Activity Type (on the 'Activities' card) should also be the Request Activity Type, and Set Person should be "Specified Person".

As mentioned above, you can only enter these five Activity Types into the Result field of an Approval Request Activity (an Activity with the Request Activity Type specified above). In practice, you will only use three (Approved, Rejected and Forwarded) because the other two are used within the program. However, if you activate 'Paste Special' from the Result field in such an Activity, every Activity Type will be listed. If you would only like the three valid Activity Types to be shown in the 'Paste Special' list, create a record in the Activity Consequences setting in the CRM module where the Type and Result in the header are the Request Activity Type and Rejected Result Activity Type respectively, and where the new Activity Type (on the 'Activities' card) is empty. As detailed elsewhere in this section, you should also have Activity Consequence records for the Approved and Forwarded Activity Types. Finally, tick the Show Results from Consequences only option in the CRM Settings setting in the CRM module. This option together with the three Activity Consequence records will mean that 'Paste Special' from the Result field in an Approval Request Activity will only list the three valid options. The Activity Consequence record with the Rejected Result will have no further impact because its new Activity Type is empty: its only purpose is to be used by the Show Results from Consequences only option.

### Automatically OK Approved Records

When a transaction passes through the approval process and is approved, its Approval Status will be set to Approved. Use this option if you would like the OK box in the transaction to be ticked as well.

The usual consequences of ticking the OK box will occur, such as the creation of Transactions in the Nominal Ledger and the updating of stock levels.

Where a transaction does not have an OK box (i.e. Internal Orders, Project Budgets, Quotations), this option will have no effect.

### Allow Editing Rejected Records

When a transaction passes through the approval process and is rejected, its Approval Status will be set to Rejected.

By default, it is not possible to edit a transaction once its Approval Status has been set to Rejected, The only way to continue with it would be to duplicate it, modify it and send it for approval once again.

Use this option if you would like to be able to edit records that have been rejected. To edit a rejected transaction, you must first set the Approval Status to Not Requested and then save the record. You will now be able to edit the record freely before starting the approval process again.

One advantage of being able to edit a rejected transaction is that the rejected Approval Request Activities will be attached, so its previous history in the approval process will be visible.

### Allow Cancelling Approval Request

When you place a transaction in the approval process by choosing 'Send for Approval' from the Operations menu, you will no longer be able to modify the transaction.

If you then discover that a transaction contains a mistake, by default you would need to contact the Approval Persons and inform them about the mistake. However, if you are using this option, you will be able to remove the transaction from the approval process, correct the mistake and re-submit it.

If you are using this option, you must specify a Cancellation Activity Type in the field above.

To remove a transaction from the approval process, open it and choose 'Cancel Approval Request' function from the Operations menu. This will cause the Cancellation Activity Type to be copied to the Result field in all Approval Request Activities, which will also be marked as Done. They will thus be cancelled and removed from the approval process. The Approval Status of the transaction will be changed to Not Requested, allowing you to make the necessary changes before re-submitting.

You will only be able to use the 'Cancel Approval Request' function from a transaction whose Approval Status is Pending, and providing there are no connected Approval

Request Activities that have already been approved (marked as Done and with the Approved Result Activity Type as their Result).

**Automatic Approval for Approver**

It may be that the Person who places a transaction in the approval process by choosing 'Send for Approval' from the Operations menu is also listed as an Approval Person for that transaction. Use this option to specify whether that Person's Approval Request Activity should be approved (marked as Done with the Approved Result Activity Type copied to its Result field) immediately and automatically. If so, and if the Person is the only approver (or if the Approval Action is "By one"), the Approval Status of the transaction will immediately be set to Approved with no further action needed.

## Rules Card

Use the grid on the 'Rules' card to define the Approval Rule(s) that will be applied to all transactions in the Register specified in the header.

As shown in the illustration below, the rows in the grid should be in transaction value order, with the lowest value at the top. In this example, the first row defines the Approval Rule for Purchase Orders up to a value of 1000.00, the second row defines the Approval Rule for Purchase Orders valued between 1000.01 and 5000.00, and the last two rows define the two-stage Approval Rule for all other Purchase Orders.

| | Up to | Type | Approval By | Action | Alarm | Next Level | |
|---|---|---|---|---|---|---|---|
| 1 | 1000.00 | None | | None | None | Not Required | A |
| 2 | 5000.00 | User | NB,ND | By one | E-mail | Not Required | B |
| 3 | | User | NB,ND | By all | E-mail | Required | |
| 4 | | User | AM,IP | By all | E-mail | Not Required | |
| 5 | | | | | | | |
| 6 | | | | | | | |

### Flip A

**Up to**

The grid on the 'Rules' card allows you to define the various approval processes that you want be used for transactions in different value ranges. Use this field to specify the upper limit of the value range for which the row will be used. Leave the field empty if there is no upper limit, as has been done in the last two rows in the illustration.

The figure here will be interpreted as being in your home Currency (Base Currency 1). So, if you enter a transaction in a foreign Currency, its value will be converted to your home Currency before the value range into which it falls can be determined.

In most cases, the value of a transaction for this purpose will be its total value including VAT (usually shown in a TOTAL field), converted if necessary to your home Currency. Exceptions are Payments (where the value will be the sum of the Bank Amounts), Project Budgets (the Total Sum, which excludes VAT) and Stock Depreciations

(the sum of the FIFO values). Leave Applications and Leave Transfers don't have any numeric values, so when entering an Approval Rules record for either of these registers you can only define a single row on the 'Rules' card.

**Type**          **Paste Special**       Choices of possible entries

Use this field to control whether the Alarm field to the right must contain a value. Enter one of the following values—

**None**              No Alarm will be required.

**User**              An Alarm must be specified.

**Approval By**   **Paste Special**        Person register, System module

List here the Person or Persons who must approve each transaction: enter their Signatures separated by commas. These Persons are described as "Approval Persons" in this documentation.

Usually, when you enter a transaction and choose 'Send for Approval' from the Operations menu, separate Approval Request Activities will be created for each Person listed in this field. However, if the Approver field on flip B is set to "Manual", you will asked to choose which of the Persons listed here are to be issued with Approval Request Activities.

It is recommended that you use the Task Manager Access setting in the System module to restrict access to the Task Managers of the Persons listed in this field. This will ensure that only they can approve or reject their Approval Request Activities.

**Action**        **Paste Special**       Choices of possible entries

Use this field to specify how many of the Persons listed in the Approval By field need to approve their Approval Request Activities in order to approve a transaction.

**None**              No Person needs to approve an Approval Request Activity: i.e. transactions will not need to pass through an approval process.

**By one**            One Person needs to approve an Approval Request Activity. When an Approval Person does so (i.e. enters the Approved Result Activity Type in the Result field and marks it as Done), the transaction will be approved (its Approval Status will be changed to Approved). No action will be needed by the other Persons: the Not Needed Result Activity Type will be copied to the Result field in their Approval Request Activities automatically, and those Activities will be marked as Done.

**By all**            All of the Persons listed in the Approval By field must approve their Approval Request Activities before the transaction will be approved.

Rejection will always be on a "By one" basis.

| Alarm | **Paste Special** | Choices of possible entries |
|---|---|---|

When you enter a transaction and choose 'Send for Approval' from the Operations menu, separate Approval Request Activities will be created for each Person listed in the Approval By field. You can also have Alarms created for those Persons, to alert them to the new Approval Request Activities.

The following options are available—

**E-mail**

Each Approval Person will be sent a Mail.

To use this option, each Approval Person must have a Mailbox, and you must also have specified a Mailbox in the From System field in the Mail and Conferences Settings setting in the E-mail and Conferences module. This Mailbox will be the Sender of all Alarm Mails.

**SMS**

Text (SMS) messages will be sent to the Approval Persons, with their mobile numbers being chosen as follows—

1.  They will be taken from the records in the Contact register for each Approval Person. These are the Contact records quoted in the Contact Code fields in their Person records.

2.  If an Approval Person does not have a record in the Contact register, or this record does not have a mobile phone number, it will be taken from the Phone 1 or Phone 2 fields (in that order) in their Person record.

To use this option, you must have specified a System Phone No. in the Internal System Alerts setting in the Business Alerts module. This System Phone No. will be the Sender of all Alarm Text (SMS) messages. If you do not specify a System Phone No., messages will not be sent.

Sending Text (SMS) messages is a chargeable Cloud Service. To use it, you must have registered your database using the Automatic Internet Enabler method, as described in the 'Enabler Key' section in the first chapter of the 'Introduction to Enterprise by HansaWorld' manual. Please contact your local HansaWorld representative to sign up for the service and for pricing details.

**Message**

Messages will appear on the Approval Persons' screens. If an Approval Person is not logged in at the relevant time, they will be shown the message the next time they log in.

| | | |
|---|---|---|
| **Next Level** | **Paste Special** | Choices of possible entries |

Use this field to specify whether the approval process is single- or multi-level, as follows—

| | |
|---|---|
| **Not Required** | The approval process is single-level. When the Approval Persons approve their Approval Request Activities, the Approval Status of a transaction will be changed to Approved. |
| **Required** | The approval process is multi-level. When the Approval Persons approve their Approval Request Activities, the next row in the Approval Rules record will take over. The Approval Status of a transaction will remain Pending. |

To use this feature, you must also create a record in the Activity Consequences setting in the CRM module. In this record, the Type and Result in the header should be the Request Activity Type and Approved Result Activity Type respectively. The new Activity Type (on the 'Activities' card) should also be the Request Activity Type, and Set Person should be "From Originating Record".

## Flip B

| | | |
|---|---|---|
| **Approver** | **Paste Special** | Choices of possible entries |

When you enter a transaction and choose 'Send for Approval' from the Operations menu, separate Approval Request Activities will be created for the Persons listed in the Approval By field on flip A, as follows—

| | |
|---|---|
| **Automatic** | Separate Approval Request Activities will be created for every Person listed in the Approval By field. |
| **Manual** | A dialogue box will open, allowing you to choose which of the Persons listed in the Approval By field will be given Approval Request Activities. |

If you are using this option, you should specify a Forwarded Activity Type on the 'Activity Types' card. If one of your selected Persons is unable to carry out their approval task, they will be able to use the Forwarded Activity Type to forward the task to one of the other Persons listed in the Approval By field.

If the approval process is multi-level (i.e. Next Level on flip A is 'Required") and in the second level this field is "Manual", each Person on approving their Approval Request Activity will be asked to choose the Approval Persons for the next level.

The choice that you make here (Automatic or Manual) will apply both to Approval Persons and to FYI Persons.

| | | |
|---|---|---|
| **FYI Persons** | **Paste Special** | Person register, System module |

When Approval Request Activities are created, additional Activities can also be created for Persons who need to know that the approval process has started, but who will not play any part in that process. These Activities are

known as "FYI Activities" ("For Your Information" Activities). List the Person or Persons ("FYI Persons") who will receive FYI Activities here. You should also choose an FYI Activity Type on the 'Activity Types' card.

**Alarm**      **Paste Special**      Choices of possible entries

When FYI Activities are created, you can also have Alarms created for those Persons, to alert them to the new FYI Activities. The options are the same as for the Alarms that can be created for Approval Persons: please refer to the description of the Alarm field on flip A (page 48 above) for details.

**Description**      A free text field where you can leave notes about the row.

# Reports

## Introduction

As with all modules, to print a report in the Business Alerts module, click the [Reports] button in the Master Control panel or use the Ctrl-R (Windows and Linux)/⌘-R (Mac OS X) key combination. The 'Reports' window will open, listing the reports that are available in the Business Alerts module—
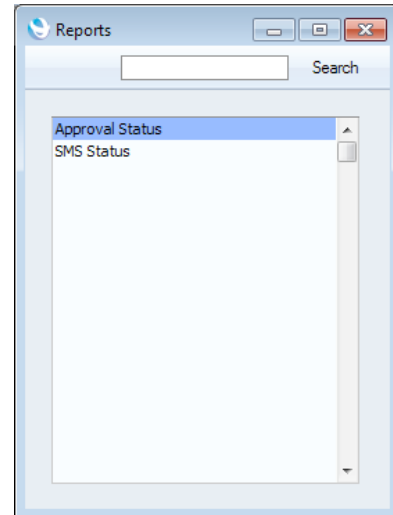


Double-click the report that you need in the list. A specification window will then appear, where you can decide what is to be included in the report. Leave all the fields in this window blank if the report is to cover all the records in the appropriate register. If you need to restrict the coverage of the report, use the fields as described individually for each report.

Where specified below, it is often possible to report on a selection range, such as a range of Customers. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Customers 001 to 010, enter "001:010" in the Customer Number field. Depending on the field, the sort used might be alpha or numeric. In the case of an alpha sort, a range of 1:2 would also include 100, 10109, etc.

Use the Media options at the bottom of the specification window to determine the print destination of the report. The default is to print to screen. You can initially print to screen and subsequently send the report to a printer by clicking the Printer icon at the top of the report window.

Once you have entered the reporting criteria and have chosen a print destination, click [Run].

With a report in the active window, use the 'Recalculate' command on the Operations menu to update the report after making alterations to background data. The 'Reopen Report Specification' command on the same menu allows you to produce a new report using different reporting criteria.

# Approval Status

This report lists the Approval Request Activities issued to a specified Person or Persons during the report period.

For each Activity, the report shows the register of the originating record, the serial number of the originating record (e.g. the Purchase Order Number or Invoice Number), the request date (i.e. the Start Date from the Activity), the requesting Person (i.e. the Salesman in the originating record), the Approval Person, the Approval Status and the value of the originating record.

When printed to screen, the Approval Status report has the Enterprise by HansaWorld Drill-down feature. Click on the serial number of an originating record to open the related Approval Request Activity.



| | | |
|---|---|---|
| **Period** | **Paste Special** | Reporting Periods setting, System module |

Enter a reporting period: Approval Request Activities whose Start Dates fall in this period will be shown in the report.

| | | |
|---|---|---|
| **Person** | **Paste Special** | Person register, System module |
| | **Range Reporting** | Alpha |

Enter a Person's Signature to list the Approval Request Activities scheduled or carried out by that Person. You can also enter a range of Signatures separated by a colon (:).

**Approval Status**      Use these options to determine the, Approval Request Activities that will be listed in the report.

    **Pending**      The report will list Approval Request Activities with no Result and those with a Result but not marked as Done.

    **Approved**      The report will list Approval Request Activities that have been marked as Done and where the Result is any Approved Result Activity Type specified in the Approval Rules records.

    **Rejected**      The report will list Approval Request Activities that have been marked as Done and where the Result is any Rejected Result Activity Type specified in the Approval Rules records.

| | |
|---|---|
| **Not needed** | The report will list Approval Request Activities that have been marked as Done and where the Result is any Not Needed Activity Type specified in the Approval Rules records. |

# SMS Status

This report shows the current status of the text (SMS) messages you sent during a specified period.

For each message, the report shows the Contact Number and Name of the recipient, the date and time the message was sent, the date and time of the latest status of the message, and the status itself.

When printed to screen, the SMS Status report has the Enterprise by HansaWorld Drill-down feature. Click on the Contact Number of a recipient to open the relevant record in the Contact register, and on the creation date of a message to open the message.
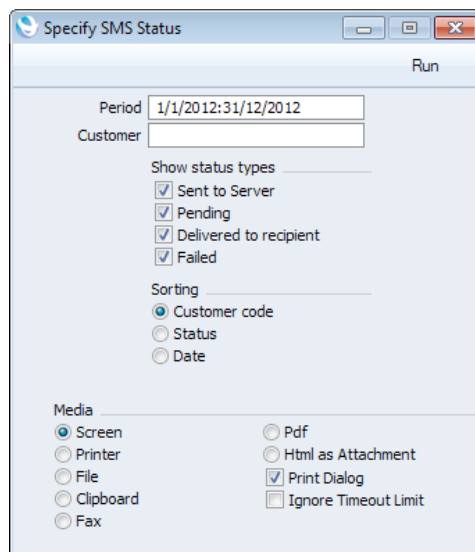


| | | |
|---|---|---|
| **Period** | **Paste Special** | Reporting Periods setting, System module |
| | Enter a reporting period: Text (SMS) messages sent during this period will be shown in the report. | |
| **Customer** | **Paste Special** | Customers, Suppliers and Contact Persons in Contact register |
| | Enter a Contact Number if you want to list messages sent to a particular Contact. | |
| **Show status types** | Use these options to include messages with various statuses in the report. | |
| **Sorting** | Use these options to specify the order in which the messages will be listed in the report. | |

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