



EMAIL BASED APPROVAL [Microsoft Dynamics NAV]

EMAIL NOTIFICATIONS | ONE CLICK APPROVAL | CUSTOMIZABLE TEMPLATES

Approvals are critical to maintain business process flow. A typical approval request passes through multiple points of approvals before it becomes actionable. In most organizations, especially where every other activity requires prior approval – the process tends to slow down due to the unavailability of the decision maker.

Email Based Approval

While NAV provides for automated approval process easing traceability and reducing error probability, some challenges remain. Pending approvals in case the approving authority is out-of-office and doesn't have access to NAV create bottlenecks.

To overcome this challenge, Alletec has developed Email based Approvals – a functionality which makes it possible for anyone to respond to a request by mail without having to access NAV.

Whenever a request is raised to an individual, the system would automatically send an email notification to his/her mail inbox with details of the request and quick links to approve or reject the request directly from their inbox. In case the request is assigned to multiple approvers, any approver from the group can approve or reject the request. The email notification contains details such as the Document No (Quote/Order/Invoice), Amount, Requestor ID, Vendor details and Due Date along with Document & Approval specific comments. Once a request is responded to, an email notifying approval/rejection is sent to the requestor.

Feature Highlights

- *Approver does not require access to NAV*
- *Documents can be Approved or Rejected by clicking the link in mail*
- *E-Mail template can be customized as required*
- *Group of approvers can be defined; any one of group member can approve or reject the document*
- *Approval and rejection of documents can be done through mobile interface*
- *Mail notification is sent to the requestor once the document gets approved or rejected*

I. Create document in NAV and assign request to approver

II. Email Layout Sent to Approver

From: Requestor
Sent: Monday, October 29, 2012 6:23 PM
To: Approver
Subject: Microsoft Dynamics NAV: Approval Mail, Document No: 104001

Microsoft Dynamics NAV Document Approval System
 Purchase Order 104001 requires your approval.
Purchase Order 104001

Requestor User ID	RequestorID
Amount	USD 10,330.89
Purchase Order Comments	Approval require urgent attention
Approval Comments	Approval against Order No 1021
Vendor	01254796 Progressive Home Furnishings
Due Date	10/29/12
Line Details	Item Code: LS-MAN-10 ,Des c: Manual,Line Amt: 1000 Item Code: LS-75 ,Des c: Loudspeaker,Line Amt: 10000

For approve click on below link:
<http://ServerName/DocumentApproval/Approve.aspx>
 For reject click on below link:
<http://ServerName/DocumentApproval/Reject.aspx>

Benefits

- Simplifies & fastens document approval process without login to NAV
- Helps approver to take suitable action through detailed notification e-mail
- Eases management of follow up history
- Two way notifications keep requestor and approver updated on the go
- Improves traceability and control over document approvals

Alletec

All e Technologies (Alletec) has been a leading provider of Business Solutions & IT services to Growth Companies since 2000. A Microsoft Dynamics Gold Competency Partner and MasterVAR – Alletec has been servicing customers pan-India, Middle-East, APAC, Europe, USA and Africa. Alletec has been engaged with Microsoft on product engineering and has also developed several industry solutions.