

Workflows and notifications

System administration

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Workflows and notifications

Require approvals before documents are submitted, and send automatic alerts.

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Overview

A **Workflow** forces a document to pass through approval stages before it can be submitted. A **Notification** sends an email or system alert when something happens, such as an invoice becoming overdue.

Prerequisites

The System Manager role. Roles for the approvers must exist. See Creating users and roles.

Steps

Create a workflow

1. Search for **Workflow** and click **Add Workflow**.
2. Enter a name and choose the **Document Type**, for example *Purchase Order*.
3. In the **States** table, add each state, for example *Draft*, *Pending Approval*, *Approved*, *Rejected*, and the **Doc Status** for each (*Draft* for the first ones, *Submitted* for Approved).
4. In **Transitions**, define who can move from one state to another: for example from *Draft* to *Pending Approval* by *Purchase User*, with the action *Request Approval*, and from *Pending Approval* to *Approved* by *Purchase Manager*, with the action *Approve*.
5. Tick **Is Active**, and click **Save**.

Create a notification

1. Search for **Notification** and click **Add Notification**.
2. Choose the **Document Type** and the **Send Alert On** event (for example *Days After* a date field, or *Value Change*).
3. Add **Recipients** (a role, a user, or a field such as the customer's email).
4. Write the **Subject** and **Message**. You can use values from the document with `{{ doc.customer }}`.
5. Save.

Practical example

Purchase orders above KES 100,000 need the owner's approval. A workflow with a condition on the grand total moves large orders to *Pending Approval*. A notification emails the owner each time

one is waiting.

Important notes

- Only one active workflow can apply to a document type.
- Test with a user who has only the roles in the workflow.
- Notifications need working outgoing email. See Email and regional settings.

Common mistakes

- A workflow without a way back from *Rejected*, which traps documents.
- Forgetting to set the **Doc Status**, so documents never become submitted.

Next steps

Read Document numbering.

Related documentation

- Permissions and restricting access
- Notifications