Approvers: How to set up email approvals for Yo-Mart requisitions 14.2

Instead of signing into Yo-mart to approve requisitions, you can have a detailed email sent to you that contains order information and action can be taken on the purchase request (requisition) directly from the email.

A personal approval code is required in order to use this feature. Each approver will need to go to their profile and set up their approval code. To do this, click on:

1. Your name on the upper right hand side of the screen
2. “View my Profile” from the drop down.
3. Under “User Profile and Preferences” click on “Users’ Name, Phone Number, Email, etc.
4. The last blank box should be "Email approval code." Enter a code of your choosing. The minimum email approval code length is 4 and may be any combination of letters, numbers and characters.

5. You must also have the PR pending Workflow approval email notification enabled. You can turn this on by clicking on “Notification Preferences” and then “Shopping, Carts & Requisitions.” Then click on “Edit Section.”
6. Now click the “Override” button and then drop down and choose either “Email” or “Email and Notification” and Save Changes.

From the email received, the approver can approve, reject, assign to self or return to requestor. They can also enter comments. Once the action is complete, the approver sees a confirmation webpage. The action is logged in history as having been taken via email. If another approver has already taken action in a shared folder, the approver will receive a message that action has already been taken.