

Sample: Approval Process

Overview

In this section, you will find information about:

- Approver assignment
- What can do the approver

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Step By Step

Assignment

Once the Sample request has been created, the Sales rep must submit it for approval.

Each GBU has their own rules to assign the samples request to the correct approver

2. Approval

Sample request saved

Approval needed?

Approval needed

NO Approval needed

Approver assignment

Approver assigned automatically

Approver assigned manually by the Sales rep

Who is approving

Approver can be a queue or a user

Approval/ Rejection

Approver Approves or rejects the sample request

Status change

Sample Status changes to rejected

Sample Status changes to approved

Sample Status automatically changes to approved

Sample can be submitted again if information is needed

Approver assignment can be done only by clicking the submit for approval button

Approval History

Submit for Approval

No records to display

There are **3 ways to assign the approver to the request** :

- Automatically assigned by the system following specific criterias
- Manually assigned by the user
- No assignment – Request automatically approved after clicking submit for approval.



All assignment criterias per GBU and specific cases are in appendix

Once assigned, the approver can do 4 actions:

- **Reassign the request** – Click on reassign link
- **Approve the request** – Click on Approve/Reject link
- **Reject the request** – Click on Approve/Reject link
- **Ask for more information** – By clicking need more information checkbox and rejecting the request

EXPLANATION of the steps:

• Reassign the request to another approver by clicking on the "Reassign" button.

Items to Approve			Manage All
Action	Related To	Type	
Reassign	Approve / Reject	S-0000018	
			Sample Request

The following page will be displayed

Reassign Approval Request
Q-0000000007

Help for this Page

Reassign Approval Request

Cancel

Related To
Q-0000000007

Created By
Geoffray Atlan

Assigned Approver
Geoffray Atlan

Approver
User
Geoffray Atlan

Comments

The approver needs to select a new approver and clicks on the « Reassign Approval Request » button.

• Approve the Request by clicking on the Approve button.

Items to Approve			Manage All
Action	Related To	Type	
Reassign	Approve / Reject	S-0000018	
			Sample Request

The following page will be displayed



Once approved, no modification will be allowed after approval. Only the "Additional shipping information" field will be editable by the submitter. If quality is changing, the sample request will have to be cloned and submitted again. If the information has to be changed like the ship to account, only the comment field will be modified.

•Reject the request

The rejection will be used in 2 cases:

•When the approver wants to reject the request

•When the approver will need more information to approve a sample request he /she will have to check the "need more information" checkbox (on the Sample page)

▼ System Information

Case Origin

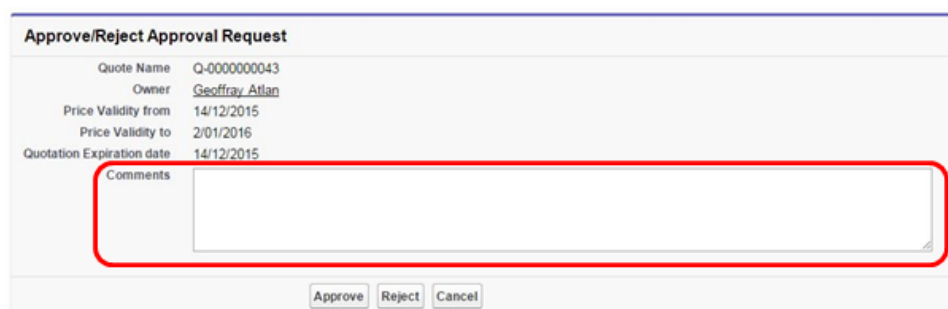
Need Information for Approving

Edit Delete Close Case Clone Sharing Submit for Approval

Approver actions

After having tick the field "Need for more information", the Approver will click on the "Approve / Reject" button on the related list

The following page will be displayed.



The approver will add comments on the approval page in order to specify why he rejects the Sample Request. Then, he will click on the « Reject » button.

The status value of the Sample Request will then be « **Rejected** »

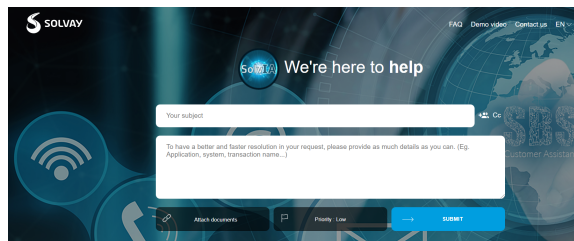
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Related articles

- [Sample: Create a Sample](#)
- [Sample: Processing the Sample](#)
- [Sample: Follow up actions and Closure](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example