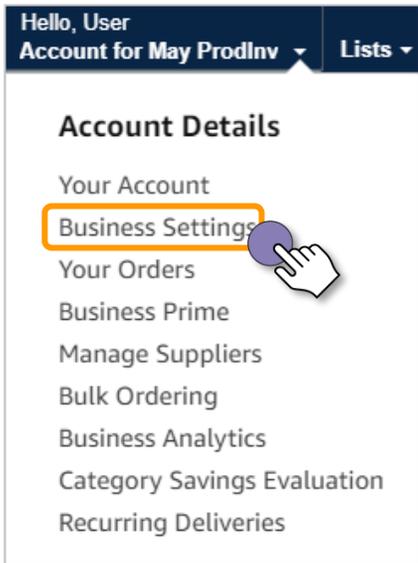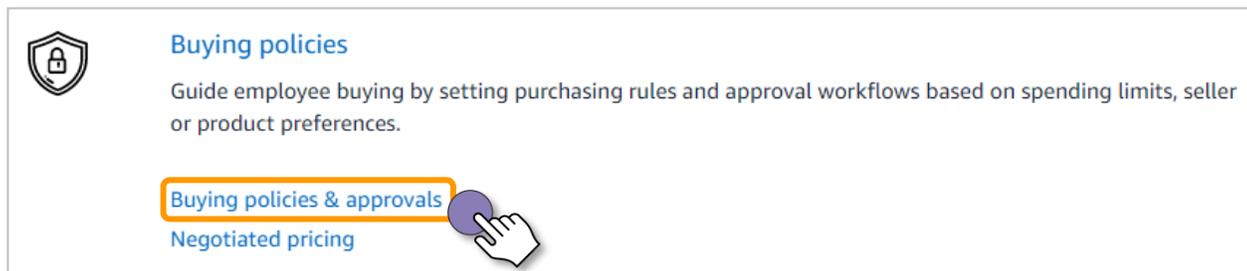# Building an Approval Workflow

1. Hover over "Hello, NAME" in the upper right hand corner of your home page.

2. Click **Business Settings** from the drop down menu.

Hello, User
Account for May ProdInv ▾   Lists ▾

Account Details

Your Account
Business Settings
Your Orders
Business Prime
Manage Suppliers
Bulk Ordering
Business Analytics
Category Savings Evaluation
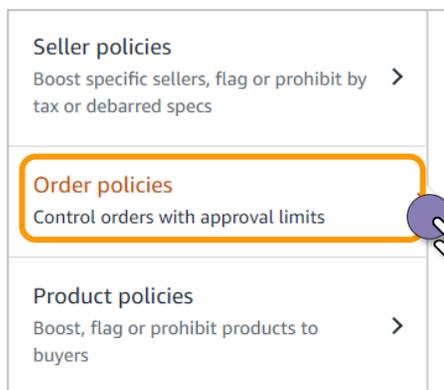Recurring Deliveries

3. Start at the group level you will be applying the approval workflow to.

4. Click **Buying policies & approvals**, under the **Buying policies** section.

Buying policies

Guide employee buying by setting purchasing rules and approval workflows based on spending limits, seller or product preferences.

Buying policies & approvals
Negotiated pricing

5. Click **Add policy**.

Approval settings   Add policy

6. Click **Order policies**.

Seller policies
Boost specific sellers, flag or prohibit by tax or debarred specs   >

Order policies
Control orders with approval limits

Product policies
Boost, flag or prohibit products to buyers   >

7. Click **Spending limits for orders**.

Spending limits for orders

Require approval or flag orders over a spending threshold

Approvals included

Spending limits for product categories

Require approval or flag products over a set spending threshold for specific categories

Approvals included ✓ **business**prime

8. Enter a **Policy Name**. Approval policy names can be up to 80 characters in length.

Policy name   0/80

Enter a policy name

9. Select to apply policy to the group or to the group and all of its subgroups.

This policy applies to

◉ This group and its subgroups

◯ This group only

10. Enter a policy description for admins (optional) and a message that buyers will see when submitting an order that falls within the approval policy. Description to admins and messages to buyers can be up to 250 characters in length.

Add notes for admins

Description for admins (optional)

Add notes about the policy. Only admins see these.

Message for buyers

You can place the order but please note that it may not comply with your organization buying policies

11. Enter an order spending limit that will trigger the approval workflow. Enter the amount of "0" to apply the policy to all orders.

| 1 | Spending limit |

More than one spend policy may apply to an order when the order amount fits the criteria. See how this works ⌄
Enter an amount of "0" to apply to all orders.

Orders greater than or equal to: $ Enter amount   **Add upper limit**

amazon business

12. Assign an approver or approvers to the policy. If multiple levels of approvals are required, select **Add approval level** to add additional levels to the policy.
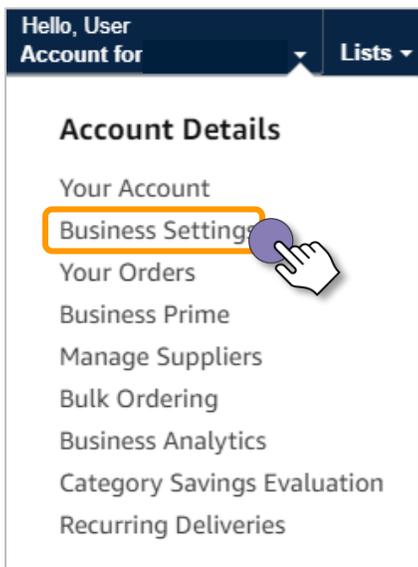

13. Once all approvers have been assigned, **Save** the policy.

Creating a Custom Approval Workflow

NOTE: Custom approvals can only be created and or updated for **individual users** within an Amazon Business account.
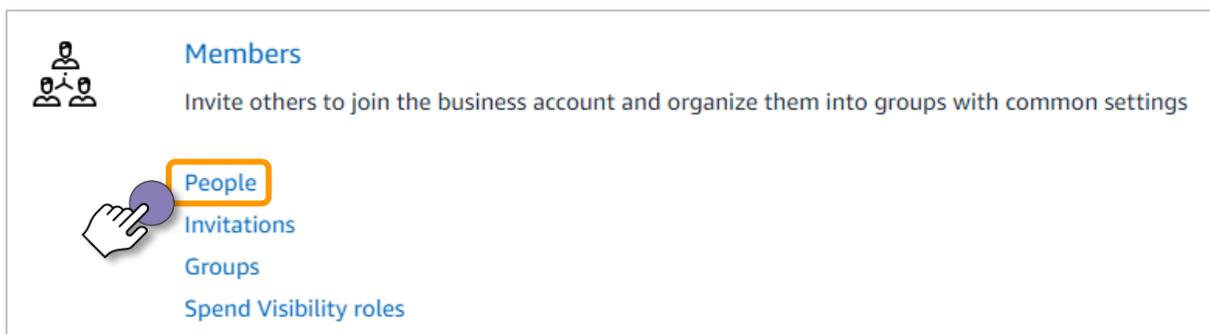
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1. Hover over "Hello, NAME" in the upper right hand corner of your home page.

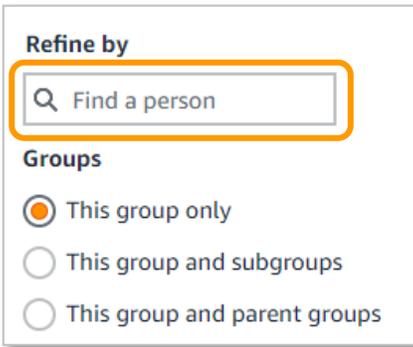2. Click **Business Settings** from the drop down menu.

3. Search for and select the user's group by entering the group name in the **Search across your business account** search bar.
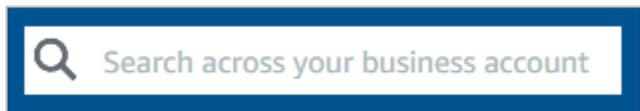
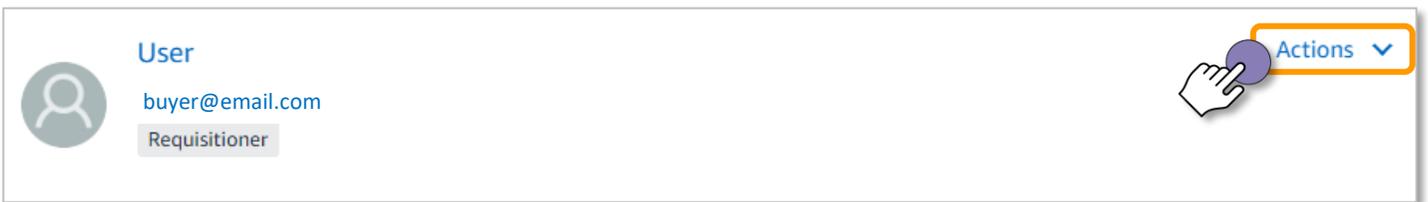4. Click **People**, under the **Members** section.

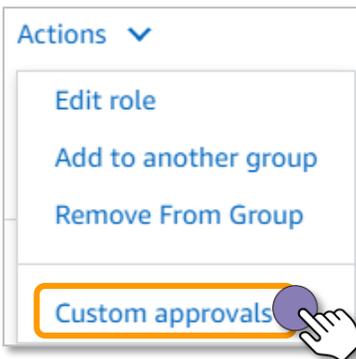5. Search for the user in the **Refine by** search field.

Refine by

🔍 Find a person

Groups

🔘 This group only

⚪ This group and subgroups

⚪ This group and parent groups

6. Click **Actions** next to the user's name and email address.

User

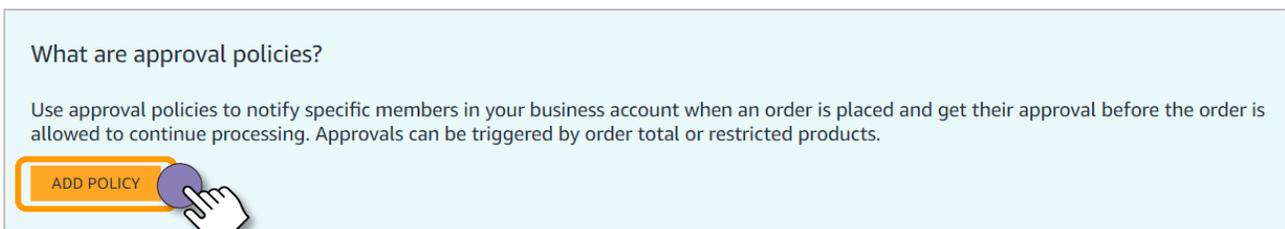buyer@email.com

Requisitioner

Actions ⌄

7. Click **Custom Approvals**. If a customer approval already exists for the user, this will say **Edit Approval**.

Actions ⌄

Edit role

Add to another group

Remove From Group

Custom approvals

8. Click **ADD POLICY**. If another approval policy is already in place on the group, the page lay-out may change.

What are approval policies?

Use approval policies to notify specific members in your business account when an order is placed and get their approval before the order is allowed to continue processing. Approvals can be triggered by order total or restricted products.

ADD POLICY

9. Enter a **Policy Name**. Approval policy names can be up to 80 characters in length.

Policy name   0/80

Enter a policy name

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10. **Enter approver names or email addresses**. If additional levels of approvals are required, click **Add another approver level** and enter approver name(s) or email address(es).

Add notes for admin
Description for admins (optional)

Add notes about the policy. Only admins see these.

Message for buyers

You can place the order but please note that it may not comply with your organization buying policies

11. Enter an order spending limit that will trigger the custom approval workflow. Enter the amount of "0" to apply the policy to all orders.

| 1 | Spending limit |

More than one spend policy may apply to an order when the order amount fits the criteria. See how this works ⌄
Enter an amount of "0" to apply to all orders.

Orders greater than or equal to: $ Enter amount   **Add upper limit**

12. Enter a policy description for admins (optional) and a message that buyers will see when submitting an order that falls within the approval policy. Description to admins and messages to buyers can be up to 250 characters in length.

| 2 | Approval workflow (optional) |

Assign who should approve orders for this policy. We'll still show the message above for buyers even if you choose not to require an approval.

LEVEL 1

Add more approvers...   ✕

LEVEL 2

Add more approvers...   ✕

Add approval level   Requires one approval from each level

13. Click **SAVE POLICY**.

CANCEL   SAVE POLICY

14. Once custom approvals have been configured for a user, it is indicated in the user list under **People**.

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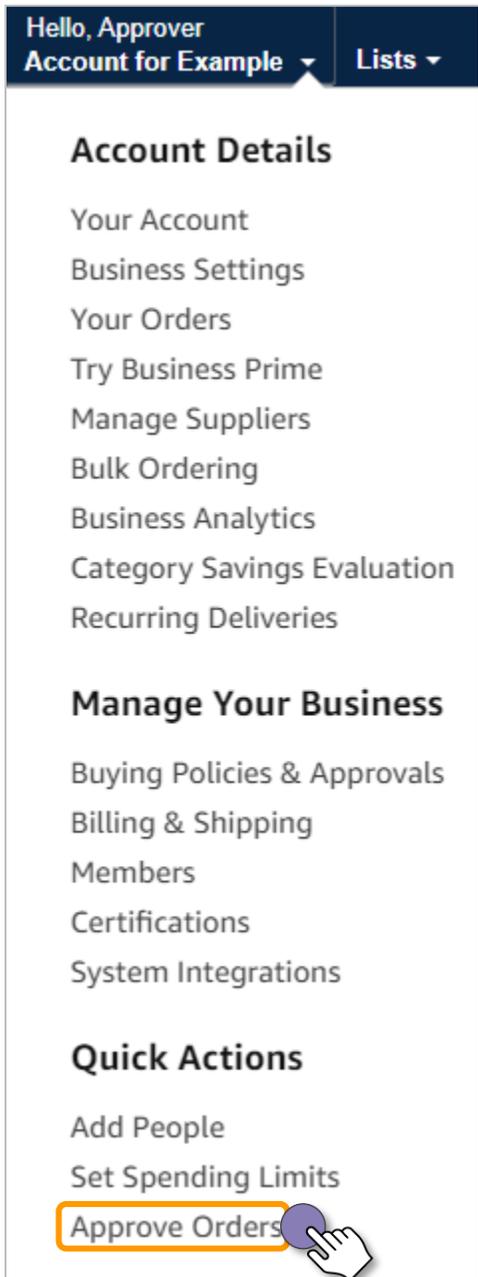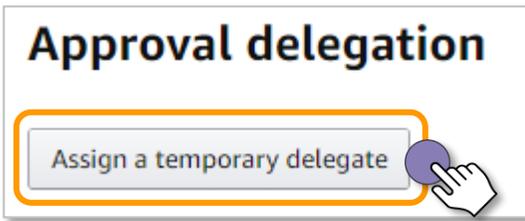
Assigning an Approval Delegate

NOTE: An approver can assign an approval delegate for time periods where that primary approver will be out of the office or unable to approve orders.

1. Hover over "Hello, NAME" in the upper right hand corner of your home page.
2. Click **Approve Orders** from the drop down menu.

3. Click **Assign a temporary delegate**.

Approval delegation

Assign a temporary delegate

4. Enter approval delegate's email address and the start and end date for the approval delegation to be applied.

Approval delegation   ×

Temporarily route all approval requests for this individual to a delegate. This applies to all groups and policies.

Approver

ApproverEmail@Example.com

Delegate

Enter email

Start date   **End date**

06/24/2021

5. Click **Save**.

Cancel   Save

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Assigning an Approval Delegate (Admin)

NOTE: An administrator can also assign an approval delegate for time periods where that primary approver will be out of the office or unable to approve orders.

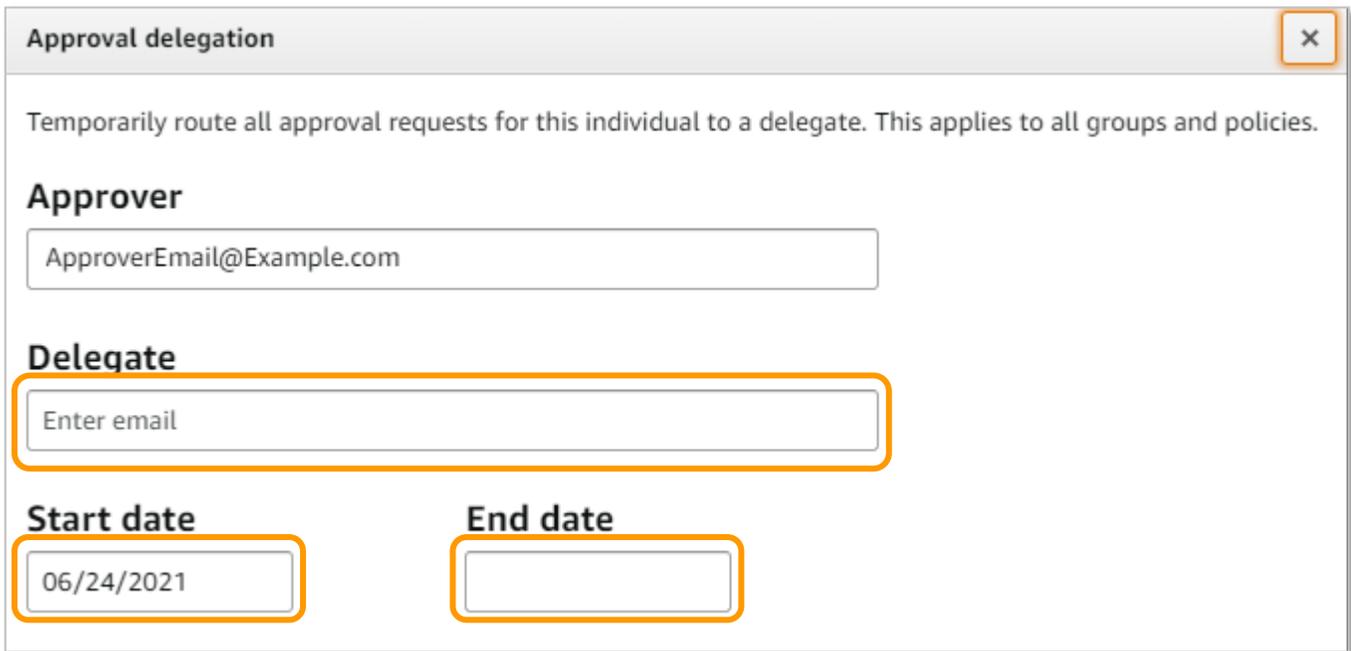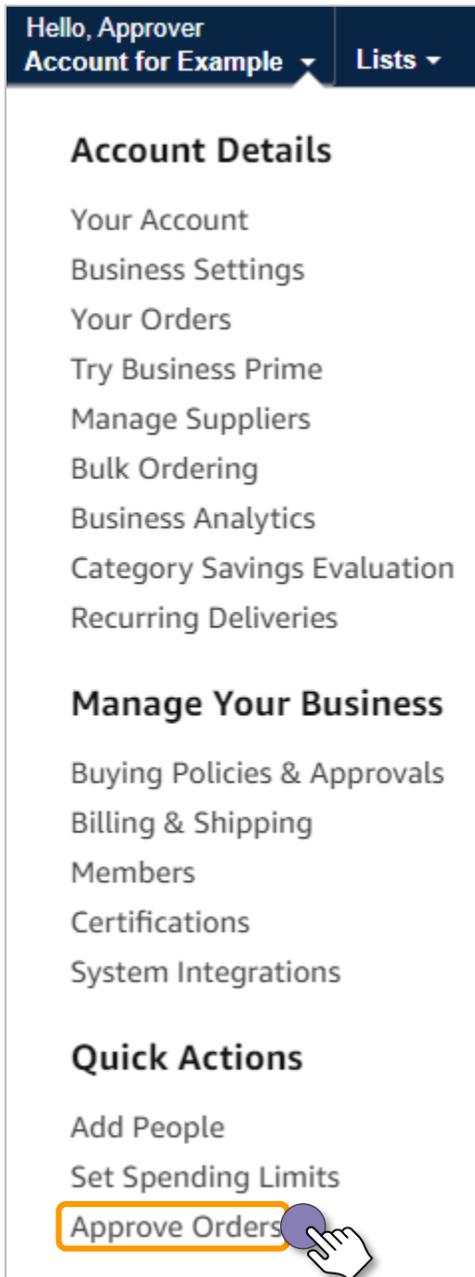1. Hover over "Hello, NAME" in the upper right hand corner of your home page.
2. Click **Business Settings** from the drop down menu.

3. Click **Approval settings**.

Buying policies & approvals AB Demo Account ⌄

Policies   Preferred products   Preferred sellers   Insights

Displaying 1 of 1 policies   Approval settings   Add policy

Refine by   🔒 Approvals   Actions ⌄

Created in   Applies to **this group** and subgroups
☐ This group (1)   Approvals required

Approvals   ✅ Other organizations also added   ✕
☐ Required   **Prefer products with sustainability certifications**   Add policy
                                 Encourage buyers in your organization to purchase more sustainable products

4. Click **Assign delegates**.

Approval settings AB Demo Account ⌄

Group approvers   👤 Approver unavailable Assign delegates

Assign the default approvers of this group for when a policy requires an order approval.

AB Demo Account approvers

Enter approver names or email addresses

Cancel   Save   Requires only one to approve when added to an approval workflow.

⚠ If approvers are not specified for this group, and Group approvers are required in a policy approval
   workflow, the orders from this group will not be subject to approval.

5. Click **Add delegate**.

Temporary delegates

AB Demo Account / Buying policies / Approval settings

ℹ

Add temporary delegates for approvers

Assign temporary delegates to take over when an approver is unavailable. Temporary delegates take over all
approval responsibilities, across all groups and across all policies, for the approver.

Add delegate

amazon business   AMAZON CONFIDENTIAL

6. Enter approval delegate's email address and the start and end date for the approval delegation to be applied and click **Save**.

Assign temporary delegate ✕

Temporarily route all approval requests for this individual to a delegate. This applies to all groups and policies.

Approver

Enter email address

Delegate

Enter email address

Start date   End date
07/06/2023   Enter ending date

Cancel   Save

Approval Workflow FAQ

Question	Answer
Does an approver need to have an administrator role and permissions?	Requisitioners or Administrators can be designated as approvers.
Does an approver need to be part of the business account?	Yes, an approver must be a user on the business account in order to be added to an approval workflow.
How many approval levels can I enable in an approval policy?	Administrators can configure up to 6 levels of approvals.
Can an approval policy or approval level have more than one approver?	Each level of approval can have more than one approver. Only one approval is needed at each level.
If I move a user to a new group, will their custom approval move with them?	If a user with a custom approval is moved to a new group, that custom approval will not follow the user. A new custom approval will need to be created for the user in the new group.
Do approvals need to apply to all orders?	Administrators can setup approvals for all orders or orders beyond a specified spend threshold or for restricted items.
Can approval policies be changed if an approver will be OOO?	Approvers can temporarily delegate their approval responsibilities if they plan to be out of the office.
Can the same approver be set up as an approver for multiple policies?	Yes, a single individual can be set up as an approver on different approval policies that are enabled within the business account.

Did you find this guide to be helpful? Please complete this short survey to provide feedback.

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