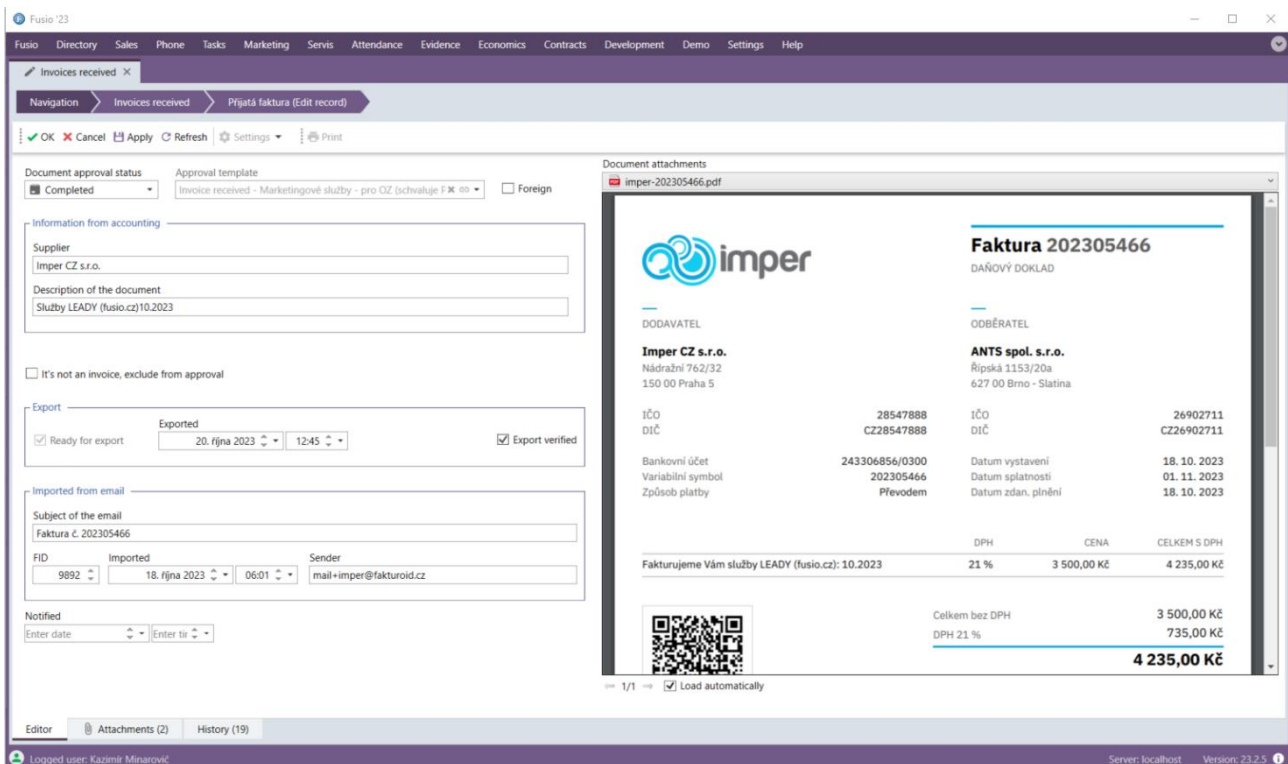


# Approval process Fusio

Universal flexible approval system



The approval process in Fusio is set up by default to create universal approval templates and flexible schemas, suitable for reliable and fast approval of various types of items in any type of organization - whether it is document or procedure approval, within even the most complex approval trees.

In addition, the Fusio system can be tailored to your specific needs.



Watch the Fusio Approval Process video on YouTube:

<https://bit.ly/2SuRz5f>



## Approval templates

- easy definition of approval plans for all types of items in your company

Quick Filter - the ability to create approval templates for any process in your company - Asset Purchases, Cash Documents, Price List Items and other approval scenarios.

A universal list where individual categories of documents and procedures can have their own approval templates, which define the individual approvers and their order as the item moves through the approval process.

| ID | Template name   | Category          | Display in other lists  |
|----|---|-------------------|---|
| 7  | Car repair and maintenance                            | Invoice receiv... | Invoice received - Car repair and maintenance   |
| 8  | 598   | Invoice receiv... | Invoice received - 598  |
| 9  | Material for telecommunications contracts             | Invoice receiv... | Invoice received - Material for telecommunications contracts                          |
| 10 | IT goods for customers                                | Invoice receiv... | Invoice received - IT goods for customers   |
| 11 | Lump sum meal vouchers                                | Invoice receiv... | Invoice received - Lump sum meal vouchers   |
| 12 | Payroll processing, accounting and tax consultancy    | Invoice receiv... | Invoice received - Payroll processing, accounting and tax consultancy                 |
| 13 | Shipping  | Invoice receiv... | Invoice received - Shipping   |
| 14 | Security and other services associated with the bu... | Invoice receiv... | Invoice received - Security and other services associated with the building           |
| 15 | Marketing materials, business cards                   | Invoice receiv... | Invoice received - Marketing materials, business cards                                |
| 16 | Property  | Invoice receiv... | Invoice received - Property   |
| 17 | Refreshments, office supplies, cleaning products...   | Invoice receiv... | Invoice received - Refreshments, office supplies, cleaning products, corporate events |
| 18 | Purchased other services (Flexidoc, etc.)             | Invoice receiv... | Invoice received - Purchased other services (Flexidoc, etc.)                          |
| 19 | Goods for telecommunications contracts                | Invoice receiv... | Invoice received - Goods for telecommunications contracts                             |
| 20 | HR (personnel service)                                | Invoice receiv... | Invoice received - HR (personnel service)   |

| Order | User  | Role               | Description                        | Wait for  |
|-------|---|--------------------|------------------------------------|---|
| 1     | Invoice received - Marketing materials, bu... | Head of Marketing  | 5 Marketing Manager Verificati...  |   |
| 2     | Invoice received - Marketing materials, bu... | Operations Manager | 5 Operation manager verificati...  | 1 - Invoice received - Marketing materials, business cards - Marketing Manager Verification |
| 3     | Invoice received - Marketing materials, bu... | Executive Director | 5 Final approval by the Executi... | 2 - Invoice received - Marketing materials, business cards - Operation manager verification |

Defined approval scheme for received invoices for marketing materials combining serial and parallel type of approval.

Each approver always awaits the opinion (approval) of the preceding approver (serial type) or the last of the group of preceding approvers (parallel type)

The use of user roles ensures versatility even in the case of rotation of individual staff positions. (Specific user names are automatically added to the approval schemes according to the current staff status at the moment the template is assigned to a given item).

The order in which individual users will approve the document depends on the contents of the Waiting for field.

# Approval schemes

- reliable approval of various types of items according to the planned scenario

List of items included in the approval process (Sample approval of received invoices).

For each item, we can see the current approval status; the approval result, if any; the template used to approve the item; and other necessary information.

| ID   | Status    | Description   | Date of f. l. | Matu...    | For pa... | Total tax excl. | Total with VAT | Description of the document               |
|------|-----------|---|---------------|------------|-----------|-----------------|----------------|---|
| 9888 | Ongoing   | Invoice received - Domains and website traffic                        | 17.10.2023    | 17.10.2023 | 0.00      | -67.00          | 0.00           | Prodloužení domény flexipoint.cz          |
| 9889 | Ongoing   | Invoice received - Car repair and maintenance                         | 16.10.2023    | 26.10.2023 | 9 648.00  | 7 974.00        | 9 648.00       | Pneuservis, autoservis ZBC 8674           |
| 9890 | Ongoing   | Invoice received - Fuel   | 17.10.2023    | 31.10.2023 | 1 739.00  | 1 437.00        | 1 739.00       | Nákup poh. hmot za 10/2023 - 1. část      |
| 9891 | Ongoing   | Invoice received - Fuel   | 17.10.2023    | 31.10.2023 | 6 592.00  | 5 448.00        | 6 592.00       | Nákup pohonných hmot za 10/2023 - 2. část |
| 9892 | Ongoing   | Invoice received - Marketingové služby - pro OZ (schvaluje PK)        | 18.10.2023    | 01.11.2023 | 4 235.00  | 3 500.00        | 4 235.00       | Služby LEADY (fusio.cz)10.2023            |
| 9893 | Ongoing   | Invoice received - Payroll processing, accounting and tax consulta... | 30.09.2023    | 25.10.2023 | 8 978.00  | 7 420.00        | 8 978.00       | Zpracování účtění a mzdové agendy 9/      |
| 9894 | Ongoing   | Invoice received - Payroll processing, accounting and tax consulta... | 30.09.2023    | 25.10.2023 | 9 680.00  | 8 000.00        | 9 680.00       | Zpracování účtění a mzdové agendy 9/      |
| 9895 | Ongoing   | Invoice received - Training   | 17.10.2023    | 12.12.2023 | 2 200.00  | 2 200.00        | 2 200.00       | Záloha na webinář Novela Zákoníku pr      |
| 9897 | Ongoing   | Invoice received - Goods for telecommunications contracts             | 17.10.2023    | 18.10.2023 | 0.00      | 294.00          | 356.00         | Konektori IEC 60320                       |
| 9901 | Completed | Invoice received - Fuel   | 05.07.2022    | 18.07.2022 | 0.00      | 1 266.00        | 0.00           | Nákup poh. hmot za 06/2022 - 2. část      |
| 8902 | Completed | Invoice received - Fuel   | 05.07.2022    | 18.07.2022 | 0.00      | 10 852.00       | 0.00           | Nákup pohonných hmot za 06/2022 - 1. část |
| 8903 | Completed | Invoice received - Nakoupené služby (schválené pouze JM)              | 01.07.2022    | 15.07.2022 | 0.00      | 75 000.00       | 75 000.00      | Objednaná oprava CTI software pro ko      |
| 8904 | Completed | Invoice received - Nakoupené opravy pro telekomunikační zakázky       | 01.07.2022    | 22.07.2022 | 0.00      | 648.00          | 784.00         | Oprava KX-TCA185 v.č. 9EBCK135480         |
| 8906 | Completed | Invoice received - Rent and utilities                                 | 11.07.2022    | 11.07.2022 | 0.00      | 16 000.00       | 0.00           | Doklad k přijaté platbě (záloha FP1220    |

Approval process (2)

Invoice rece... Approver

FP230313 Kazimír Minarovič

FP230313 Aron Feldman

Approval status

Approved 24.10.2023

For approval 25.10.2023

Working days for approval

5 Ověření obchodním ředitelem

5 Finální schválení vykonávaným ředitelem

Preview of the approval process of the marked document - with specific user names added; the approvers comment from the top one by one, or in parallel according to the settings in the Wait for field.

A simple serial diagram where we see that the document has already been approved by the first two approvers and is now waiting for the last one to comment.

History with similar invoices, e.g. to compare individual amounts, etc.

Attachments with saved files and documents.

## Template Editor

- creation of universal templates combining serial and parallel type approval

Fusio '23

Fusio Directory Sales Phone Tasks Marketing Servis Attendance Evidence Economics Contracts Development Demo Settings Help

Invoices received × Approval templates ×

Navigation > Approval templates > Schvalovatelé (Edit record)

OK 
  Ok and next 
  Ok and copy 
  Cancel 
  Apply 
  Refresh 
 Settings 
  Print

Approval template

Invoice received - Marketing materials, business cards × ↻

Role: Operations Manager × ↻     
 User:      
 Working days for approval: 5

Description

Operation manager verification

Order: 2

Wait for: 1 - Invoice received - Marketing materials, business cards - Marketing Manager Verification × ↻

The ability to specify an approver via their user role or by adding a specific name.

The content of the Waiting for field determines the order of the approver in the approval plan.

Option to set a time limit for comments.

It is always better to set approvals for a role rather than for a user – for example, when an employee leaves, it is sufficient to assign the role to his successor and there is no need to correct all affected approvals.