



WORK ORDER APPROVALS (VIA EMAIL)

Work Order Approval allows you to email a PDF of the work order to the grower for their review. Contained in the email are two buttons: Approve and Cancel. The grower chooses whether to Approve the work order, or to Cancel it. agrē sends a message to the user notifying them of the grower's choice, and can optionally automatically close the cancelled work orders.

Note Grower Central is required in order to use Work Order Approval.

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Company Configuration Options (one time task)

Enable Approval Email must be checked. Automatically closing cancelled work orders is optional.

👽 Company Level Settings	
Save 🔇 Exit	
General Accounts Receivable Blending Accounts Pavable Inventory Agronomy Reports Messages	
Invoices Loadout Tickets Work Orders AR Release Numbers AR Payments Customers Statement/Invoice E	mailer
Automatically generate Reference Number must be	
Default to 'No Service Date' Service Date is manda Work Order Approval	
🔽 Default to 'No Authorization' 🗌 Default to 'Use Current Directory' 🔽 Enable Approval Em	ail
✓ Default to Committed	n Cancel
Exclude Closed Lines from Totals (untaken, Form only)	mount

File > Config Options > Company

Sending Work Order Approvals

Once you've checked Enable Approval Email in the company config options, two new fields are displayed on the work order: *Approval Status* and *Send Approval on Save?* For new work orders, the approval status is Not Sent.

After the order is complete, check Send Approval on Save and Save it.

Add Work Order	
Save Documents 2 Refresh S View Credit S Exit	
Reference: For Generate Reference Automatically	Type: O Quote O Order Sub Type:
Customer: Carter, Alexander (C0874) Find Add	Location: Dog River
Date Ordered: May 22, 2015 💌 Status: Active 💌	Created By: agre User
Expiry Date: Jun 21, 2015	Comments:
Customer and Order Products (1) Seed	
Customer Order No:	
Approval Status: Not Sent Send Approval on Save?	s:

If you've asked agrē to prompt you to preview on save, optionally preview the work order.



TipYou may want to 'take a picture' of how the Work Order looks before you
email it to the grower for their approval (it's handy to have a copy of the
original order if you make changes to it later).There's more info about Save to Document Manager in online Help

When the *Send Work Order Approval* window opens, add the grower's email address and any additional information (if required) and click *Send*. The work order closes.

To.		a copy of the work order is attached	
Subject:	Work Order Approval Reque	ested for DWO 147	_
Attached:	Work Order DWO147.PDF		
Message:	(optional) add any that needs to be in	additional information cluded in the email	agre will insert the following message text into the email when it is sent:
	Work O	rder Approval	
From:	agreUser(Please Review the a Click 'Approve' to ap Approve	ttached Work Order: DWO147 prove the Work Order, or 'Cancel' to cancel Cancel	the Work Order.

The Approval Status is updated to Pending indicating an approval email has been sent.

Uvork Orders	
+ Add 🖋 Edit 🗙 Delete 🚧 New Search 🗉 Preview Item 👻 🗊 History 🔇 Exit	
Customer Order Date Expiry Date Type > Carter, Alexander May 22, 2015 Jun 21, 2015 Order	Status Image: Work Order Number Active (Pending) 0 DWO139
Edit Work Order: DWO139	
Save 🗙 Delete 🚯 Refresh 🖾 History 💲 View Credit 🔇 Exit	
Reference: DW0139	Type: C Quote Order Sub Type:
Customer: Carter, Alexander (00183) Date Ordered: May 22, 2015 Approval Status = Pending	Add Location: Dog River
Expiry Date: Jun 21, 2015	Comments:
Customer and Order Products (1)	
Customer Order No:	Paid In Full / Deposit: Terms:
Approval Status: Pending Send Approval on Save?	Custom
L	

The *Pending* status does not prevent editing the work order. Products can be added and removed if needed.

Resending the Approval

As long as the Approval Status is *Not Sent* or *Pending*, the *Send Approval on Save?* button is active and the email can be resent if required.

Tip

Grower Approval

The grower will receive an email and clicks either Approve or Cancel.



The grower will be taken to your Grower Central site (they won't need to log in) and receive visual confirmation of their choice.



Approval Status Updates in agrē

Back in agrē, you'll see which button they clicked.

If you've set the config option to automatically close cancelled work orders, they will be closed.

Work Orders		
+ Add 🔄 Reopen 🗙 Delete 🏟 Ner	v Search 📰 Preview Item 🔹 🖽 H	fistory 😣 Exit
Customer Abraham, James Carter, Alexander > Carter, Alexander	Order Date Expiry Date Typ May 22, 2015 Jun 21, 2015 Ord May 22, 2015 Jun 21, 2015 Ord May 22, 2015 Jun 21, 2015 Ord May 22, 2015 Jun 21, 2015 Ord	De Status Image: Constraint of the status der Active (Pending) 0 WOrk Order Number der Active (Approved 0 DWO139 der Closed (Cancelle 0 DWO140
3 Work Orders found		Paid In Full? Deposit:
Approval Status: Approved Approval Status changed by alex.carter@gmail.com or	▼ May 25, 2015 4:17 PM	edit the work order to see who approved/cancelled, and when

The Approval Status does not prevent editing the work order. Products can still be added and removed if needed.

You'll also receive an agrē message advising you of the grower's decision.

👽 agrē - agre User in Te	est Play			- • ×
File Accounts Receivable	Inventory Accounts Payable	General Ledger Blending Agi	ronomy Reports Window Help	
Invoices 🔬 Loadou	t Ticket 📗 Work Order 🛛 🔗 Mai	ke a Blend 🧟 Customer Account	t Surch. Invoice Aurch. Order Messages (104)	Exit
Message Cent	agre User name		grower's email address	
Inbox		Archive Messages	Message	
Sent By SYSTEM	Subject	Sent On May 22, 2015 12:30 AM	Approval for Work Order DWO139 has been received.	~
Debbie Ewing	Work Order DWO139 Updated	May 22, 2015 3:35 PM	debbiee@tronia.com has set it to 'Approved.'	
Debbie Ewing	Work Order DWO 139 Updated	May 22, 2015 3:43 PM		
Debbie Ewing	Work Order DWO 140 Updated	May 22, 2015 3:44 PM 👻		-
Move Read Mes	sages to Archive after window closes			

Unlike other types of messages, there is nothing to setup on the Company Config Options *Messages tab*. The message will be sent automatically to the agrē user who saved the work order and sent the email to the grower.