Approval Flows

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Overview

Approval flows are an important compliance feature in Total Expert. An approval flow specifies one or more users who must explicitly approve a requested print piece or email before it can be printed or sent.

Applying an approval flow to a print piece or email allows you to manage the process of releasing material to current or potential customers. When used appropriately, this process ensures that only compliant, accurate, and relevant information is released.

When a user requests to distribute a print piece or email that has an approval flow applied, the approver is automatically notified by email. If more than one approver is required by the approval flow, each approver is notified when it is their turn to approve. For emails, approvals must be given in the order specified; for print pieces, approvals may be given in any order. If any approver denies a request for a print piece, the piece can be revised and resubmitted.

Once approved, an email is immediately queued to send at the time and date requested, and a print piece becomes available to use in a print order.

Creating a New Approval Flow

An organization administrator must set up an approval flow and apply it to any materials that should be approved. The user setting up an approval flow does not necessarily have to be the user who is designated to approve the material.

1. Navigate to **Manage Marketing → Approval Flows**. This page lists all the approval flows that your organization has created previously, even if they were created by other users.
2. Click the **+Create** button.
3. In the slide-out panel:
    a. Enter a name for the approval flow. The name should be brief, but descriptive, possibly including the name(s) of the user(s) who must approve items subject to this approval flow.
    b. In the **Add User** drop-down menu, select the name of a user who must approve an item and click the **Add** button on the right side. This user is listed below with the designation Final Approver. If only one user must approve, skip to step 3e.
    c. Repeat step 3b for any additional users who must also approve items. Users are added to the bottom of the list, so the most recent addition is the Final Approver.
    d. Drag and drop the names into the order in which they must approve an email (print pieces may be approved in any order, regardless of the order of this list). The user listed first will have to approve the material before the remaining approvers are notified. The last user listed is the Final Approver and has the final opportunity to approve or deny an email.

> **Note**
> You can remove a name from the list by clicking the red button with a white X at the right end of their row.

    e. Click the **Submit** button at the top of the panel.

The new approval flow is added to the list.

Editing an Existing Approval Flow

1. Navigate to **Manage Marketing → Approval Flows**.
2. Select the checkbox for the approval flow you want to edit.
3. Click the **Update Selected** button that appears at the top of the page.
4. In the slide-out panel, make changes the same way you would when creating a new approval flow.
5. Click the **Submit** button.

Deleting an Existing Approval Flow

1. Navigate to **Manage Marketing → Approval Flows**.
2. Select the checkbox for the approval flow you want to delete.
3. Click the **Delete Selected** button that appears at the top of the page.
4. Click the Ok button in the confirmation box.

The approval flow is removed from the list.

Warning
Any materials that required this approval flow can now be sent without any approval.

Assigning an Approval Flow to Materials

The procedures below assume that the email or print content template already exists. Furthermore, you can set approval flows at the user level, the team level, or both. In the event that conflicting user and team approval flow settings exist for a template, the user setting takes precedence. For example, if you require approval flow A for members of Team T and approval flow B for user Bob who is a member of Team T, then when Bob requests approval, approval flow B is used, and A is ignored.

Note
No matter which of the following processes you use, you can only select one approval flow option per email or print content template. If you want multiple users to approve the same request, create an approval flow with multiple approvers and assign that option.

Email

1. Navigate to **Email Marketing → Emails**.
2. For the email template, select **Actions → User Settings** or **Actions → Team Settings**.
3. Select the checkbox(es) for any user(s) or team(s) who must obtain approval before sending the email.
4. Click the **Change Settings** button at the top of the page.
5. In the slide-out panel:
   a. In the Access Settings section, ensure that **Add Access** is selected.
   b. (optional) In the Email Settings section, select the **Allow editing when used as a template** checkbox. If this remains unchecked, the selected user(s) or team(s) will be able to send the email, but only exactly as built in the template.
   c. Select the desired option from the **Approval Flow** drop-down menu.
   d. (optional) Select the **Recipient Count Approval Threshold** checkbox and enter a number of recipients. If this remains unchecked, the approval flow will trigger regardless of how many recipients the sender selects. If this is checked, the approval flow will trigger only if the sender selects more recipients than the number entered.
6. Click the **Submit** button at the top of the page.

Print Content

There are 2 separate ways to assign an approval flow to a print content template. To assign an approval flow to all users in your organization, use the media settings; to assign an approval flow for only selected user or teams, use the user or team settings.

Media Settings

1. Navigate to **Manage Marketing → Manage Templates**.
2. For the desired template, select **Actions → Media Settings**.
3. In the Default User Settings section on the right side of the page:
   a. Check the **Grant access to all users** box. (A co-marketed template must have a cost split markup assigned before access to it can be granted.)
   b. (optional) Check the **Grant access to co-marketing partners** box.
   c. In the **Proof Approval Process** drop-down menu, select the desired approval flow.
4. The other options here are not related to approval flows and should be set according to the needs of the piece.
5. Click the **Save Media** button at the top of the page.

User or Team Settings

1. Navigate to **Manage Marketing → Manage Templates**.
2. For the desired template, select **Actions → User Settings** or **Actions → Team Settings**.
3. Select the checkbox(es) for any user(s) or team(s) who must obtain approval before sending the piece.
4. Click the **Change Settings** button at the top of the page.
5. In the slide-out panel:
   a. Ensure that **Add Access** is selected for Template Access.
   b. Select the desired option from the **Proof Approval Process** drop-down menu.
   c. The other options here are not related to approval flows and should be set according to the needs of the piece.
   d. Click the **Submit** button at the top of the page.

What Happens When a User Requests an Approval

The way an approval progresses depends on whether the Media Approval Checklist organization setting has been activated for your organization.

The rest of this section describes the behavior when the setting has been activated. For a description of the behavior without it (legacy behavior), see the Appendix.
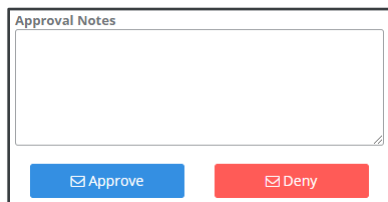
Email

Single Approver

When the requesting user sends the request, the approver receives an email notifying them of the request. This email contains the requesting user's name, the name of the email, a direct link to the email to review, and any notes the requester added. The approver can either click the link or navigate to **Email Marketing → Approval Requests** in the platform, locate the new request in the list, and click the **Review** button.

As the approver, review and edit the message to ensure it meets all relevant standards. If so, click **Approve**; if not, click **Deny**. In either case, enter a comment in the Approval Notes box.

When approving or denying an email, the reviewer is presented with a box of options to determine which users are notified of the decision. In the case of a single approver:

- The approver has the option of notifying the requesting user.
  - If this box is checked, they also have the option of notifying the user featured in the email and/or the specified co-marketer (if any).
  - If this box is unchecked, the featured and co-marketing users *cannot* be notified.
  - If the requesting user is the same as the featured user and both are selected, that user will only receive one notification email.
- There are no options available in the Approvers section, because there are no other approvers to notify.
- Once the desired boxes are checked, click the **Submit** button. You must select at least 1 user to notify, which means you must check the box for at least the requesting user.
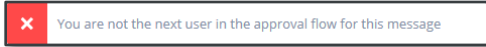
If the email is approved, the selected users receive an approval summary email, and the email is automatically queued to send at the requested time. (If the requested time has already gone by, the message is sent immediately.) If the email is denied, the selected users receive a denial notification, which includes a link back to the email so they can make adjustments and request a review of the updated version.

Multiple Approvers

If the approval flow includes more than one approver, only the first approver is notified when the requesting user submits the message for review. Everything proceeds the same way as with a single approver, with the following exceptions:

- The requesting user receives a separate notification for each approval (if the approver selected to notify them).
  - These notifications (prior to the last one) include a list of the approvers who have already approved the email, a list of the approvers who have yet to review it, and the approval note from the most recent approver.
  - When the last user in the sequence approves the email, the notification email simply states that the email has been approved and shows the final approver's approval note.
- When you approve an email, the next approver in the sequence must be notified.
  - The next approver receives an email notification with the same information the first approver received, except it has the previous approver's comment instead of the requesting user's.
  - You also have the option to notify any approvers who came earlier in the sequence. This email notification is the same as the one sent to the requesting user; it does not include a link to the email, because these users do not have the opportunity to review an email when it is not their turn.

- Subsequent approvers will see the message in their Approval Requests list right away, but if they attempt to review it before their turn, they will see an error message.

> ✕ You are not the next user in the approval flow for this message

If all approvers do approve the message, the email is automatically queued to send at the requested time. (If the requested time has already gone by, the message is sent immediately.)

If any approver denies the request, they have the option of notifying the requesting user. If so, then they can also notify the featured user and/or co-marketing partner. They also have the option of notifying any user who has already approved the email, but not the remaining approvers who have yet to review it. In any event, the email is cancelled.

The denial notification sent to the requesting user includes a link back to the email so they can make adjustments and request a review of the updated version. In this case, the re-approval is sent directly to the user who denied it (even if they were not the first approver). It does not need to be re-approved by any users who approved the previous version.

Print Content

The requesting user follows the same steps they would when working on a piece without an approval flow, saving drafts as desired. When the piece is ready for approval, enter a comment in the Add Draft note box, review the list of all the users who must approve the piece, and click **Save & Request Approval**. The requesting user can see the piece by navigating to **Print Marketing → Saved** and clicking the **Pending Approval** option. If all reviewers approve the request, it moves to the Approved section; if any reviewer denies the request, it moves to the Denied section.

Single Approver

When the requesting user sends the request, the approver receives an email notifying them of the request. This email contains the requesting user's name, a direct link to the piece to review, and a preview of the piece. The approver can either click the link or navigate to **Print Marketing → Saved** in the platform, filter the list by clicking the **Pending My Approval** option, locate the new request in the list, and select **Actions → Review**.

As the approver, review and edit the piece to ensure it meets all relevant standards. If so, click **Save & Approve**; if not, click **Save & Deny**. You also have the option to save the draft without making a final decision; if you do this, you can revisit the piece and make a decision later. In any case, enter a comment in the Add Draft Note box.

Add Draft Note

Save Draft

Save & Approve   Save & Deny
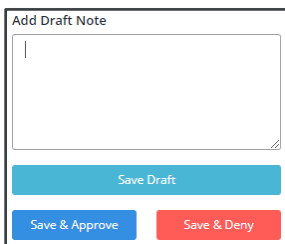
When approving or denying a print piece, the reviewer is presented with a box of options to determine which users are notified of the decision. In the case of a single approver:

- The approver has the option of notifying the requesting user.
  - If this box is checked, they also have the option of notifying the user featured in the email and/or the specified co-marketer (if any).
  - If this box is unchecked, the featured and co-marketing users *cannot* be notified.
  - If the requesting user is the same as the featured user or co-marketer and both are selected, that user will only receive one notification email.
- There are no options available in the Approvers section, because there are no other approvers to notify.
- Once the desired boxes are checked, click the **Submit** button. You must select at least 1 user to notify, which means you must check the box for at least the requesting user.

If the piece is approved, the selected users and the approver receive a Media Approval Summary email. This email contains instructions for placing an order or generating a PDF based on the piece.

If the piece is denied, the selected users receive a denial notification. The requesting user's copy includes a link back to the piece so they can make adjustments and request a review of the updated version.

Multiple Approvers

If the approval flow includes more than one approver, requesting user proceeds the same way as in the case of a single approver or if no approval was needed.

If the approval flow includes more than one approver, only the first approver is notified when the requesting user submits the piece for review. Everything proceeds the same way as with a single approver, with the following exceptions:

- Approvers for the piece may review the piece in any order. The piece is available to any approver if they navigate to **Print Marketing → Saved** in the platform, filter the list by clicking the **Pending My Approval** option, locate the new request in the list, and select **Actions → Review**. This is true even if they have not yet been notified by email.
- When a reviewer approves a piece:
  - Any remaining approvers who have not yet reviewed the piece must be notified.
  - The current approver has the option of notifying any approvers who have already approved the piece.

For each reviewer who approves the piece, one notification is sent to the requesting user, featured user, co-marketer, and prior approvers (if they are selected). This includes the name of the piece, the name of the user who just approved, the approval note, and a list of any approvers who still have to review the piece. A separate notification is sent to the remaining approvers. This includes the name of the user who requested the approval, a direct link to the piece to review, and the last approval note. Both types include a preview of the piece.

If all reviewers approve, all users selected by the final approver receive a Media Approval Summary email. This email contains instructions for placing an order or generating a PDF based on the piece.

If an approver denies the piece, they have the option of notifying the requesting user. If that user is not notified, no other users can be selected. If that user is notified, the denying user has the option of notifying the featured user or co-marketer also. The approvers who have not yet reviewed the piece are not notified. If any users approved the piece before the denial, the denying user has the option whether or not to notify each prior approver.

In the event of a denial, any user with access to the piece can modify and resubmit it by navigating to **Print Marketing → Saved**, selecting the **Denied** option, and selecting **Actions → Apply Fixes** (or by clicking the link in the denial notification, if they received one).

Appendix: What Happens When a User Requests an Approval and the Media Approval Checklist Setting Is Off
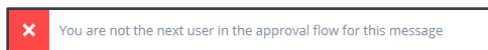
Email

Single Approver

When the requesting user sends the request, the approver receives an email notifying them of the request. This email contains the requesting user's name, the name of the email, a direct link to the email to review, and any notes the requester added. The approver can either click the link or navigate to **Email Marketing → Approval Requests** in the platform, locate the new request in the list, and click the **Review** button.

As the approver, review and edit the message to ensure it meets all relevant standards. If so, click **Approve**; if not, click **Deny**. In either case, enter a comment in the Approval Notes box.
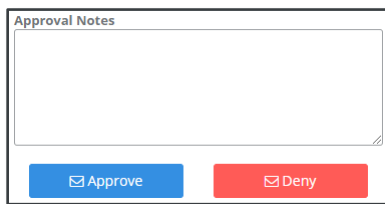
Multiple Approvers

If there are additional approvers, each subsequent approver is notified only when the previous approver has approved. Their notification email contains the same information as the first, except it has the previous approver's comment instead of the requesting user's. Subsequent approvers will see the message in their Approval Requests list right away, but if they attempt to review it before their turn, they will see an error message.

If all approvers do approve the message, the email is automatically queued to send at the requested time. (If the requested time has already gone by, the message will be sent immediately.)

If any approvers deny the request, the email is cancelled. The requesting user does not have the opportunity to adjust the draft and resubmit for approval; the user must create a new version of the email from scratch.

Print Content

Single Approver

The requesting user follows the same steps they would when working on a piece without an approval flow, saving drafts as desired. When the piece is ready for approval, enter a comment in the Add Draft note box and click **Save & Request Approval**. The requesting user can see the piece by navigating to **Print Marketing → Saved** and clicking the **Pending Approval** option. Once the approver makes a decision on the piece, it moves to either the Approved or Denied section, as appropriate.

The approver receives an email notifying them of the request. This email contains the requesting user's name, a direct link to the email to review, any notes the requester added, and a preview of the piece. The approver can either click the link or navigate to **Print Marketing → Saved** in the platform, click the **Pending My Approval** option, locate the new request in the list, and select **Actions → Review**.

As the approver, review and edit the piece to ensure it meets all relevant standards. If so, click **Save & Approve**; if not, click **Save & Deny**. There is also an option to save a draft, in which case the piece will remain pending. In any case, enter a comment in the Approval Notes box.

When a piece is approved, both the requesting and approving users receive an email notification. The email contains instructions for placing an order or generating a PDF based on the piece.

If a piece is denied, the requesting user receives an email notification that the piece was denied with a link back to the platform where they can adjust the draft and resubmit for approval. The piece can also be adjusted by navigating to **Print Marketing → Saved**, clicking the **Denied** option, and selecting **Actions → Apply Fixes**. When corrections have been made and resubmitted, the approver who denied the piece is notified and can either approve or deny the new version.

Multiple Approvers

If the approval flow includes more than one approver, the only difference for the requesting user is that before submitting for approval, they see a list of all the users who must approve the piece.

Once the piece is submitted, the first approver receives an email notification, just as they would if they were the only approver. All approvers can see the requested piece by navigating to **Print Marketing → Saved** and clicking the **Pending My Approval** option. Approval is given the same way as when only a single approval is required.

When the first approval is complete, the requesting user is notified by email of that approval (however, the piece is still listed under Pending Approval until all approvals are complete). Any remaining approvers receive an email notification that their approval is requested. This email contains the first approver's comment. The first approver no longer sees the piece under Pending My Approval, but they can still see it under Pending Approval.

When all approvals are complete, the requesting user and all approvers receive an email with the date of each approval and each approver's comment. The email contains instructions for placing an order or generating a PDF based on the piece. Any of these users can place an order from this piece. The piece now appears only under Approved for everyone, and not under Pending Approval.

Unlike email approvals, print approvals may be given in any order, so any approver can select **Actions → Review** for a piece they see under Pending My Approval. If approvals are given in a different order than that given in the approval flow, all remaining approvers are notified, and everything proceeds the same way.

If any approver denies the piece, only the requesting user is notified. As when there is only one approver, the requesting user has the opportunity to edit to the piece and resubmit it.