Threshold Approver

This topic refers to approval of costs associated with ordering printed marketing materials. It is not related to the similar-sounding process of an *approval flow*, which is used for approving changes to an email or print marketing piece prior to its being sent out.

Depending on its setup, a given piece could be subject to either an approval flow upon creation, a threshold approval when it is ordered, or both—or neither.

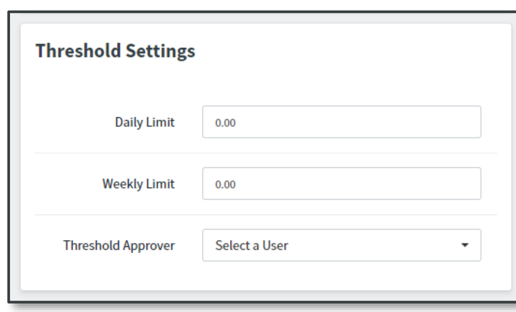
Setting Up Threshold Approvals

Expense thresholds are set individually for each user in your organization. The amount that a user must spend before an approval becomes necessary is limited on both a daily and a weekly basis. Any purchases below the thresholds are considered to be approved automatically. If no thresholds are set for a user, their purchases will never require an approval.

Example
If a user has a daily limit of $100 and a weekly limit of $500, they could make 5 daily purchases of $90 without triggering the approval process at all. However, if their 1st purchase of the week were for $200, the approver would have to approve that cost. If they then made a purchase for $90 on the 2nd day, this would not be subject to approval because it does not violate either limit.

To set thresholds for a given user:

1. Navigate to **Organization Admin → Users**.
2. For the user you want to set thresholds for, select **Actions → Edit**.
3. Click the **Marketing Profile** tab.
4. Scroll down to the Threshold Settings section. You can set either a daily limit, a weekly limit, or both. If you set either limit, you must also select an approver.
    a. Enter a value in the **Daily Limit** field. If the user places one or more orders for print materials whose total exceeds this value in one calendar day, the specified threshold approver will need to review any orders exceeding the limit.
    b. Enter a value in the **Weekly Limit** field. If the user places one or more orders for print materials whose total exceeds this value in one calendar week, the specified threshold approver will need to review any orders exceeding the limit.
    c. Select a user from the **Threshold Approver** drop-down menu. This user will be notified by email to review any orders placed by this user that exceed either the daily or weekly limit.

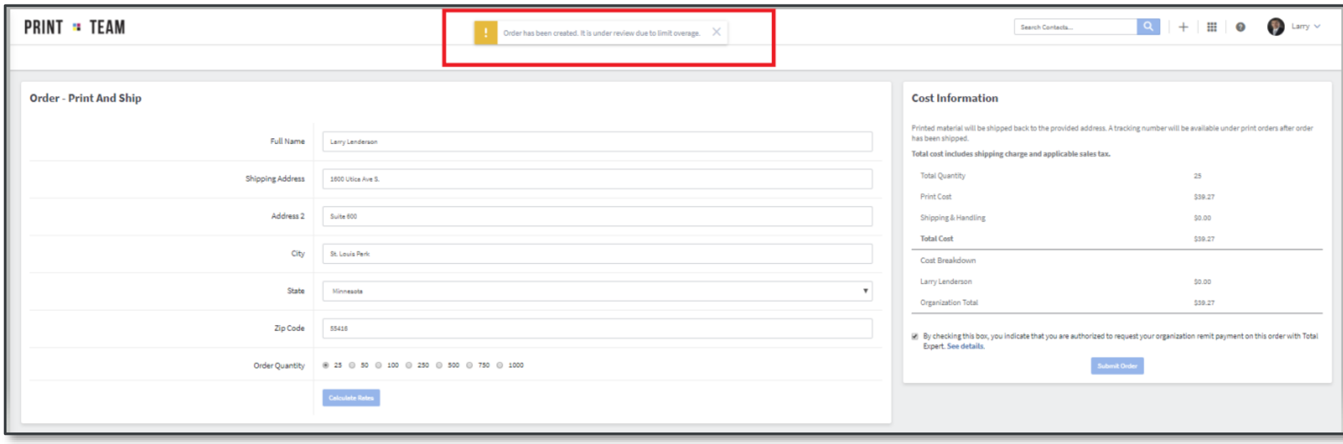


5. Click the **Save User** button at the top of the page.

Note
You must configure these settings for each user separately. To set up many users at once, contact customer support.

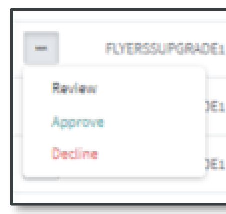
Approval Process

When a user places an order whose total puts them over either the daily or weekly limit, they immediately see a message at the top of the page telling them that the order has been recorded but the cost must be approved: "Order has been created. It is under review due to limit overage."



The user who placed the order can see a record of the order by navigating to **Print Marketing → Orders**. In the Order Status column, the new order has the value Under Review.

The user designated as the approver receives an email notifying them that an order is waiting for their approval. They can click the link in the email or navigate to **Print Marketing → Over Limit Approvals** to see the list of orders under review. For a particular order, click the ellipsis menu **[…] → Review** to see the details of that order. If satisfied with the order, they should select **Approve** from that menu. If not, they should select **Decline**.



If the order is approved, the user who requested it receives an email notification that their order payment was completed, including a summary of the order. If the order is declined, the user who requested it receives an email notification that their expense request was declined, including contact information for whom to contact with questions about the order.