UWL: Shopping cart– Workflow/Approval process

Purpose

Use this procedure to approve, reject, or edit a shopping cart.

Trigger

Perform this procedure when there is a shopping cart that needs to be reviewed.

Menu Path

Use the following menu path to access the transaction: N/A.

Helpful Hints

There are multiple levels of approvals for shopping carts - Manager and Fiscal Approver. The manager can approve, reject, or edit the shopping cart. The Fiscal Approver can only approve or reject the shopping cart by line item, but cannot edit the shopping cart. This example shows both levels of approval.

Procedure

1. Start the transaction using the menu path or transaction code.

2. Click .

3. Click Universal Worklist.

Shopping carts may require several levels of approval. This example shows two levels: Manager and Fiscal Approver. First you will see the Manager approval.
4. Click 🛒.

5. Click Complete_Shopping_Cart.1000010302.with.Value.1000.00.USD to open the shopping cart.

6. Click Approve.

After reviewing the shopping cart, the Manager can either Approve, Reject, or Edit it by clicking the appropriate button.

To reject the shopping cart, first add a note in the Approval Note field that includes the reason it is being rejected. Finally, click Reject.

The Edit option allows you to open the shopping cart and make edits before approving.

7. Click Display / Edit Agent to see who the next approver is.

The shopping cart has been approved by the Manager and is now routed to the Fiscal Approver.

8. Click Shayla SRM.Cleon SRM to view the next approver's user ID.

9. Click Close.

10. Click ☐ to close the shopping cart.

11. Click Log off to log off as the Manager.

12. Click Universal Worklist.

Next you will see the Fiscal Approver's approval steps.
13. Click 🔄.

14. Click 💻 to view the shopping cart.

15. Click Submit after rejecting or approving line items.

   The Fiscal Approver selects Reject or Approve for each line item.

   Note that the Fiscal Approver cannot edit a shopping cart.

16. Click Refresh to see the updated status.

   The shopping cart has been approved by the Fiscal Approver.

17. Click 🌐 to exit the transaction.

   The shopping cart status changes to Approved.