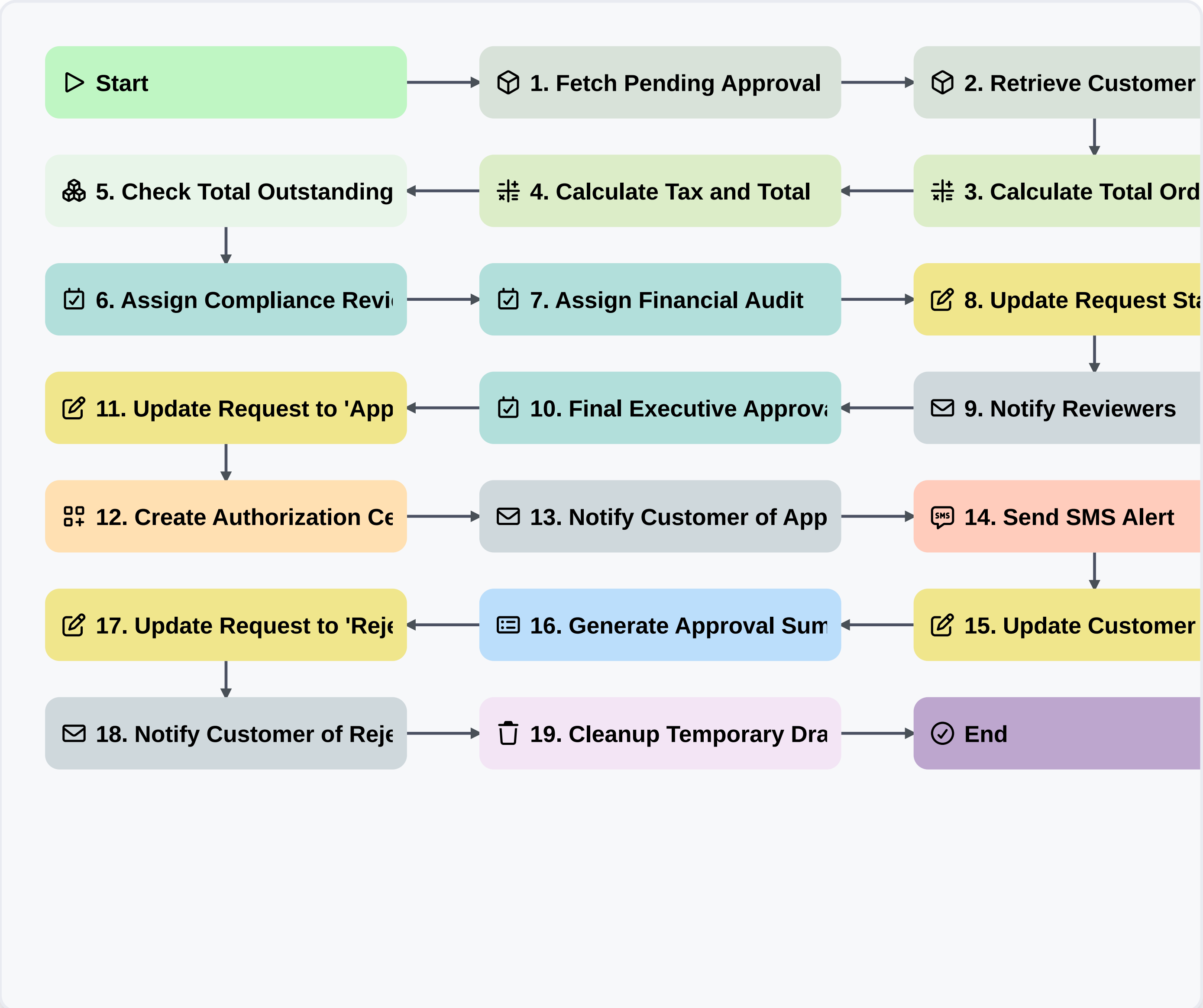
ChecklistGuro

Customer Approval And Authorization Workflow



Start
Start of the Workflow/Process.

1. Fetch Pending Approval Request
Retrieve the specific customer request entry that has triggered the workflow.

2. Retrieve Customer Profile
Fetch the associated customer's master data (contact info, credit limit, etc.) from the Customer Data Model.

3. Calculate Total Order Value
Sum the costs of all line items associated with the approval request.

4. Calculate Tax and Total
Apply tax formulas to the subtotal to determine the final authorized amount.

5. Check Total Outstanding Debt
Aggregate all 'Unpaid' invoices for this customer to see if total debt exceeds the threshold.

6. Assign Compliance Review
Create a task for the Legal/Compliance team to verify the authorization documents.

7. Assign Financial Audit
Create a task for the Finance Manager to verify the creditworthiness of the request.

8. Update Request Status to 'Under Review'
Update the initial entry to reflect that the approval process has officially started.

9. Notify Reviewers
Send an email to the assigned Compliance and Finance users notifying them of a new pending approval.

10. Final Executive Approval Task
Create a task for the Senior Manager once all preliminary reviews are completed.

11. Update Request to 'Approved'
Update the entry status to 'Approved' upon successful completion of all tasks.

12. Create Authorization Certificate
Create a new entry in the 'Authorized Orders' data model to act as the official record.

13. Notify Customer of Approval
Send a formal email to the customer with the details of the authorized request.

14. Send SMS Alert
Send a high-priority SMS to the Account Manager notifying them that the deal is closed.

15. Update Customer Credit Limit
Update the Customer Data Model to reflect any changes in authorized spending power.

16. Generate Approval Summary Report
Generate a monthly report summarizing all approved and rejected authorizations for management.

17. Update Request to 'Rejected'
Update the entry status to 'Rejected' if any review step fails the criteria.

18. Notify Customer of Rejection
Send an email to the customer explaining that the authorization request was not approved.

19. Cleanup Temporary Drafts
Delete any temporary or draft entries created during the calculation phase of the workflow.

End
End of the Workflow/Process.