

Approval mechanisms

Companies require approval mechanisms and strategies for a variety of reasons, mainly to ensure effective decision-making, maintain consistency, manage risks, and align with their goals and values. Here are some key reasons why companies implement approval strategies:

1. **Control and Oversight** - Approval strategies provide a structured process for reviewing and approving decisions. This control ensures that important decisions are not made haphazardly or without proper consideration. By establishing clear approval hierarchies, companies can prevent errors, oversights, or actions that might be detrimental to the organization.
2. **Risk Management** - Certain decisions can carry significant risks, whether financial, legal, reputational, or operational. An approval strategy helps assess and mitigate these risks by involving relevant stakeholders who can provide expertise and insights to ensure the decision aligns with the company's risk tolerance and compliance standards.
3. **Consistency** - Companies often aim to maintain consistency in their operations, branding, and messaging. Approval strategies help ensure that decisions are aligned with established guidelines and standards. This consistency is crucial for maintaining a strong brand image and delivering a unified experience to customers, partners, and employees.
4. **Resource Allocation** - Decisions related to resource allocation, budgeting, and expenditures can impact the company's financial health. An approval strategy helps ensure that resources are allocated wisely, optimizing the company's financial performance and preventing wastage.
5. **Alignment with Goals** - Companies have specific objectives, mission statements, and strategic goals. Approval strategies help ensure that decisions made at various levels of the organization are aligned with these broader goals, contributing to the company's overall success.
6. **Regulatory and Legal Compliance** - Many industries are subject to strict regulations and legal requirements. An approval strategy helps ensure that decisions and actions taken by the company adhere to these regulations. This can help prevent legal issues, fines, or other negative consequences that may arise from non-compliance.

Approval processes

ZUGSEIL supports many approval for many entity types. The approval process is for all entity types subject to approval/confirmation processes governed by the [approval agent](#) and [entity specific approval strategies](#), which can be administered in our [approval strategy administration app](#).

ZUGSEIL offers highly configurable approval strategies for these processes:

- **Internal order approval** - Before an [internal order](#) is processed financial approval, material approval, team order approval, personal equipment approval must be granted
- **Purchase order approval** - Before a [purchase order](#) is forwarded to the supplier a financial approval and material approval must be granted
- **Customer order acceptance** - Before a customer order is confirmed to the customer a financial approval and material approval must be granted
- **Delivery confirmation** - Before a bill is payed, the receipt of the shipment must be confirmed
- **Digital creation** - Before a new b-op digital is created, a responsible person must approve the confirmation

Default approval strategy

For each approval strategy type you may define one default strategy. When picking a strategy, e.g. for digital creation of within a shopping purpose you always have the option "Use default approval strategy" instead of selecting a specific approval strategy. This allows central manipulation of approval strategies without the need to locate each place where it was used.

Related articles

- [Entitites subject to approval & Task types](#)

Related development articles

- [App:Approval strategies administration](#) - This app allows approval strategies, which can be bound to many approval governing objects
- [App:Task manager](#) - This app allows responsible persons to grant or reject approvals
- [Dev:Approval agent](#) - The central service, which governs the approval process depending on the settings made in the applicable approval strategy.
- [Dev:Digital deployment service](#) - The central service for automatic deployment of digitals.