



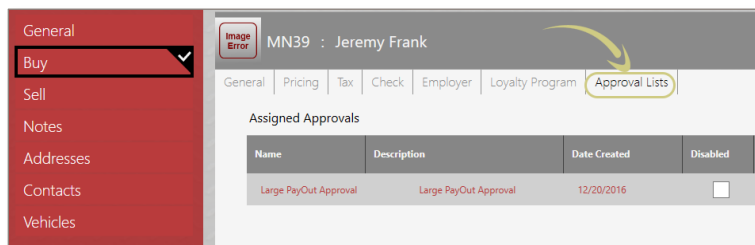
# Scrap Dragon Xtreme – Release Notes



## Version 3.0.8

### New

- **User Approval - Users can now be set up to approve specific customer transactions.**
  - User Approval affects the Buy menu in Scrap Dragon-X.
  - The new User Approval functionality allows you to assign specific customers to the Approval List. When a Buy ticket is generated for this customer, it must be approved by a specified user before it can be paid.

- **To see the Approval List for a customer:**
  1. From the Start screen, select **Back Office**.
  2. Select **Master Files**.
  3. Now, select **Customers**.
  4. Search for and select the specific customer using the search field.
  5. From the **Customer Edit** window, select the **Buy** tab.
  6. Now select the **Approval Lists** tab. This is where you will control the Assigned Approval, Approval User, and name of approval.



- **To set up a new approval for a customer:**
  1. From the Approval Lists tab, click the  button from the action menu.
  2. Now choose a **Lookup Approval** reason and choose **Select**.
    - a. If you need to add a new reason, choose the  button.
    - b. Now, name your approval.
    - c. Add the Approval User by selecting **Lookup Users**.

**Note:** You can have the Approval User receive an email notification when a customer is set up with a new Buy ticket. If the ☐ **Send Email?** is selected in the approval Users List, the user will receive an email to let them know that there is an approval waiting for them.

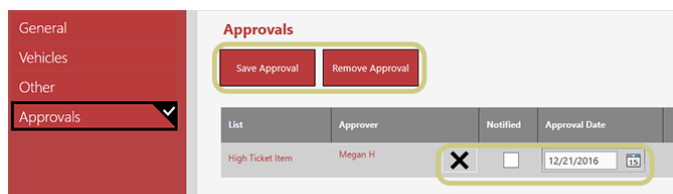
- d. Finally, add the Customer by selecting **Lookup Customers**.
- **To edit/remove an approval for a customer:**

There are two ways to edit/remove an approval:

    - From the **Back Office Menu**:
      1. From the **Customer Edit** screen, select the **Buy** tab.

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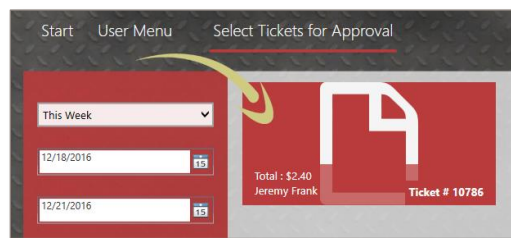
2. Select the **Approval Lists** tab.
  3. Click on the assigned approval that you would like to remove.
  4. Now select either **Remove** or **Edit Approval**.
- From the ticket:
1. From the ticket in the Buy screen, select **Ticket Info**.
  2. Select **Approvals** from the menu.
  3. From this screen, you can:
    - Remove an approval from the ticket by selecting **X** and **Save Approval**.
    - Remove an approval entirely by selecting it and choosing **Remove Approval**.
    - Approve the ticket for an approver (with Administrative permissions) by selecting a date and **Save Approval**.
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- Note:** You can also select the **Notified** checkbox to show the approver has been notified.
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- **To handle a ticket for a customer that needs approval:**
1. Create ticket as usual. You will notice that the **Pay Ticket** button is now replaced with the **Awaiting Approval** button for these customers.
  2. Close ticket and wait for approval.
  3. Look up closed ticket and now **Pay Ticket** as usual.
- **To Approve a Buy Ticket for a customer as an Approval User:**  
The user that is set up as the Approval User can now log in and approve the ticket.

There are two ways to approve a ticket:

- **Close Ticket**
1. Log in as the Approval User.
  2. Select the Buy button.
  3. Select View Closed.
  4. Filter by ticket number or choose ticket from the available list.
  5. Click **Close Ticket**.
- **User Menu**
1. Log in as the Approval User.
  2. Select **User Menu**.
  3. Select **Approve Tickets**.
  4. Select the ticket that is awaiting approval.



5. Now, click from the Action Menu.