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## Approvals

2019-11-25 - Emily Booth - [댓글 \(1\)](#) - [Product](#)

We are proud to announce the release of Approvals. Approvals will give you more power to streamline & record your approval processes - whether that is gaining your customer's permission or making internal company requests. You can read further about how to create Approval templates [here](#), and how your agents can use Approvals [here](#).

With Approvals, an agent can generate a request manually with just a few clicks.

Let's take the example scenario of a customer requesting a discount on their product training purchase. The agent handling the ticket sees the customer's request & decides managerial approval is required. All the agent needs to do is click on the Approvals tab, select the appropriate request template & submit the request for their manager's consideration.

Depending on how the approval template has been set up by the admin, the agent can select the approvers or the approvers can be pre-set. The agent will have the option to add a description to accompany the request unless this has also been preset.

The screenshot shows the 'APPROVALS (1)' tab in the agent interface. It features a 'REQUEST TEMPLATE' dropdown set to '30% Discount Authorisation' and a selection for 'John Doe' as the approver. A text area for 'DESCRIPTION' contains the text 'Please approve this, as they are an existing company renewing.' At the bottom right are 'Create' and 'Cancel' buttons.

Once a request has been created, the approver/s are informed & the request is logged on the ticket. To guarantee accountability, the log includes all vital information about the request & its current status. The approver, in this scenario the agent's manager, will be informed by email about the pending request. To ensure security, the manager is required to log into either the agent interface or the Help Center to respond to the request. Regardless of which method is used, the manager can approve or reject the request & submit a text response explaining their reasoning if they wish.

The screenshot shows the 'Approvals' log table. It has columns for ID, Name, Description, Approvers, To approve, To reject, and Status. One entry is visible for ID 3, '30% Discount Authorisation', with a description 'Please approve this, as they are an existing company renewing' dated 04/11/2019, approved by John Doe. Below the table are 'Approve' and 'Reject' buttons, and a 'Make a request' button at the bottom right.

| ID | Name                       | Description   | Approvers           | To approve | To reject | Status                  |
|----|----------------------------|---|---------------------|------------|-----------|-------------------------|
| 3  | 30% Discount Authorisation | Please approve this, as they are an existing company renewing | 04/11/2019 John Doe | 1          | 1         | <button>Cancel</button> |

### Case Study Approval

John Doe (Fri, 8th Nov 2019) wrote:  
Please can we use your company as a case study?

Approve

Reject

The sidebar displays approval details: 'Requesting agent' is John Doe, 'User' is Mana Ger (manager@deskprodemo.com), 'To approve' is 1/1, 'To reject' is 1/1, and 'Approvers' is Mana Ger (manager@deskprodemo.com).

Once the manager has made their decision, the Approval log is updated & the agent handling the ticket is notified. At no point during the approval process is the agent's ability to converse with the customer interfered. Multiple ongoing requests can be linked to a single ticket.

