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Setting up a Payment Approval Flow

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How to Configure Payment Approval Flows

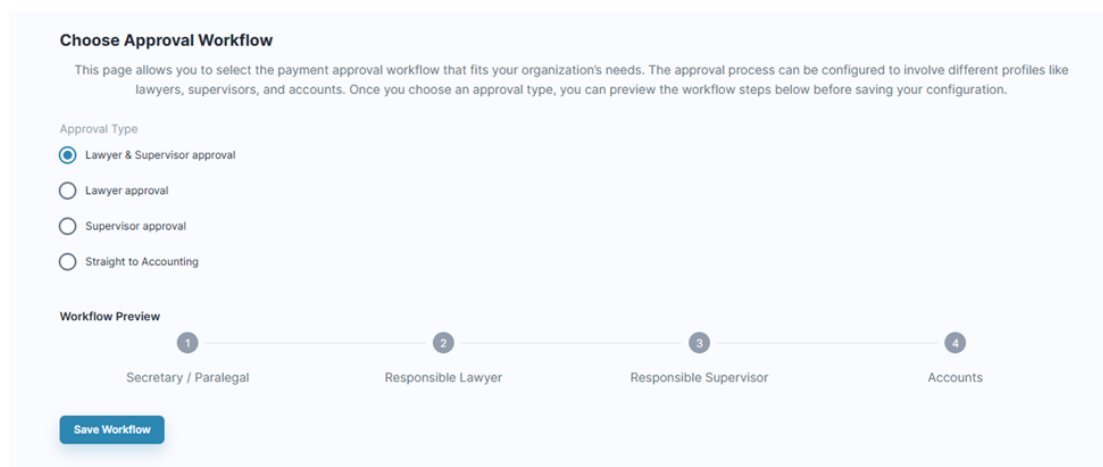
Setting up a payment approval flow ensures that every financial transaction within your Yao system is reviewed and authorised by the correct personnel before completion. This process enhances financial security and provides a clear audit trail for your firm's expenditure.

Prerequisites

- **Administrator Access:** You must have admin user privileges to access the configuration settings required for this setup.

Accessing Approval Flow Settings

1. Navigate to the **Configuration** menu, which is located on the sidebar at the left-hand side of the screen.
2. Locate the horizontal navigation bar at the top of the page and select the **Approval Flow** tab.
3. By default, the system will open the **Payment** sub-tab. *You will now see the "Choose Approval Workflow" interface.*



Selecting and Saving a Workflow

There are four distinct payment approval workflows available in the system. You must select the one which best aligns with your firm's internal requirements.

1. Review the **Approval Type** list to choose your preferred flow:

- **Lawyer & Supervisor approval:** Requires authorisation from both the fee earner and their direct supervisor.
- **Lawyer approval:** Requires authorisation from the lawyer assigned to the matter.
- **Supervisor approval:** Requires authorisation from the designated responsible supervisor.

- **Straight to Accounting:** Bypasses manual approval steps and sends the payment directly to the accounts department.

2. Select the radio button next to your chosen **Approval Type**.

3. Review the **Workflow Preview** section at the bottom of the page to see a visual map of the steps involved in your selection.

4. Click the **Save Workflow** button located in the bottom-left corner of the interface. *The new workflow is now active.*

Note: Any payment added to the Yao system prior to saving these changes will immediately follow the newly selected flow.