

Adding a New Panel

This guide has been put together to give you a step by step guide for adding a customised Panel of your own in Approval Donkey.

Prerequisites

The only thing you need to set-up your own Panel is a registered Approval Donkey account (MEMBER or PLUS).

General Points

- On a Member account you can belong to as many Panels as you are invited to for free
- On the PLUS account you can create an unlimited number of Panels and invite an unlimited number of members

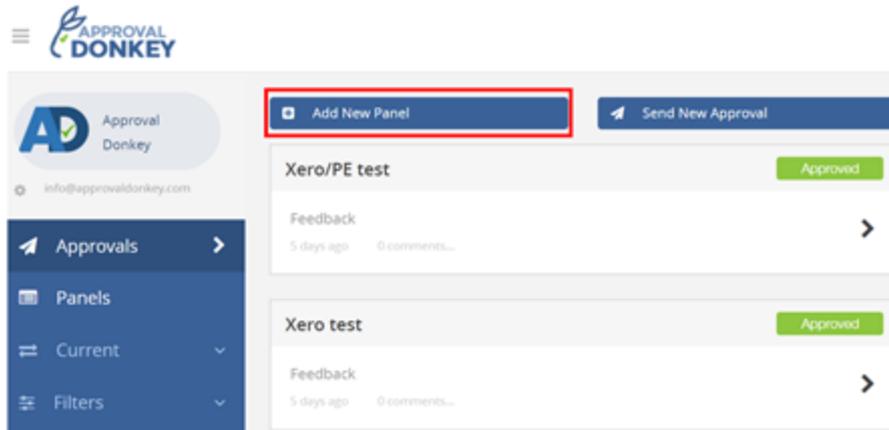
Step by Step Set-up

Note: To set-up conditional mapping using e.g. tracking codes please see the '**Xero Conditional Mapping**' Guide.

1) Login to the Approval Donkey Dashboard



2) Select 'Add new Panel'

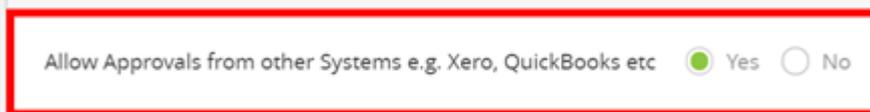


3) Enter the Panel name, this can anything you want but should describe the workflow you are wanting to complete.

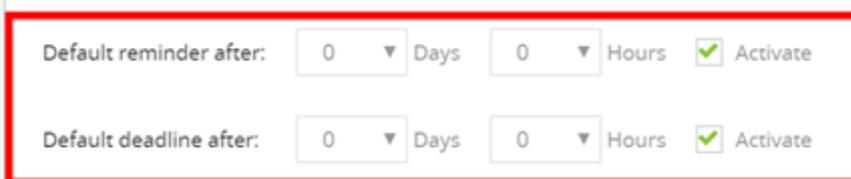


4) If you want to allow other systems and people to send requests to the Panel then select 'Yes'. If you want to keep it a closed Panel i.e. only Panel members can send requests then select 'No'

Note: If you are wanting to set-up an integration with e.g. Xero or Zapier then select 'Yes'



5) You can set automated notifications and deadlines to trigger at certain times after an initial request is sent.



Note:

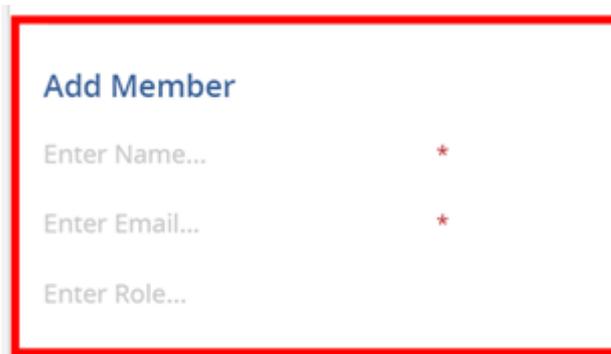
- If the reminder time is triggered the initial request is re-sent to any Panel members who have not responded.
- If the deadline time is triggered the request status will change from Pending to Overdue.

6) As the Panel Owner you are required to be part of the Panel. You can however choose your role:

1. Approver– choose this role for yourself if you want to approve or decline requests
2. Reviewer– choose this role if you don't want to have to approve or decline requests (you will still be copied into any requests for visibility and can comment or add attachments)

Each Panel must have at least one approver therefore if you choose 'Reviewer' for yourself then you must Add a Member as an approver.

7) Add as many panel members as you like, they each receive a personalised invitation. You can add and remove Panel members at any time after the Panel has been set-up.



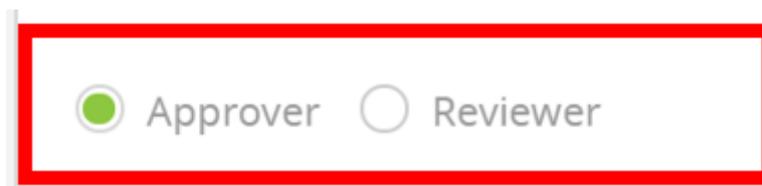
Add Member

Enter Name... *

Enter Email... *

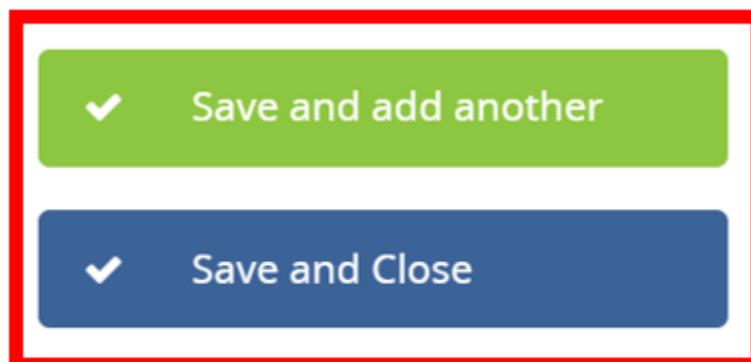
Enter Role...

8) Approvers have full read/write access to requests. Reviewers cannot approve or decline requests but can comment and add attachments.



Approver Reviewer

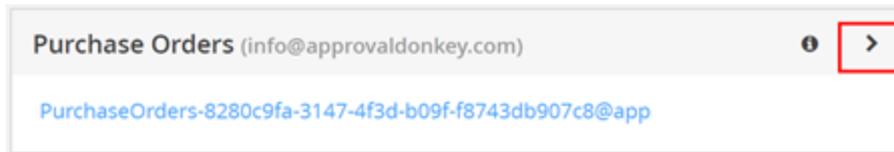
9) Select 'Save and add another' if you have more members to add or just 'Save and close' if your done.



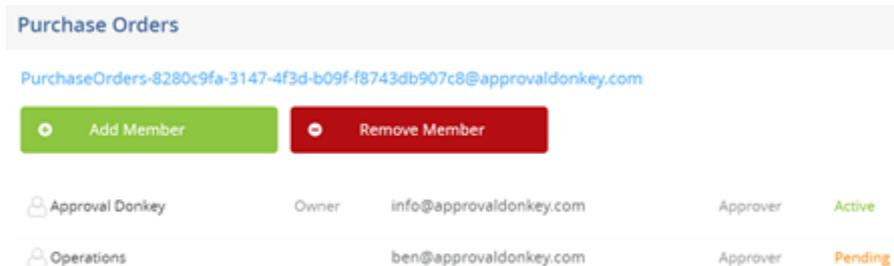
✓ Save and add another

✓ Save and Close

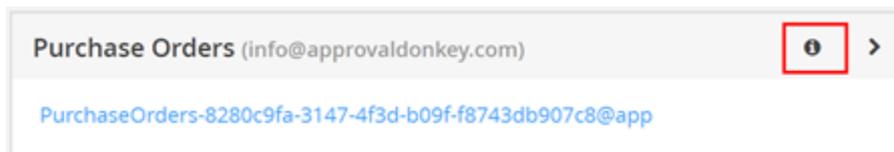
The Panel is now set-up and ready to use. Select the arrow icon to maintain Panel members.



View who each Panels members are and Add or Remove them here.



Select the 'i' icon to see and maintain the Panels settings.



The Panel settings screen will show where you can maintain how each of your Panel behaves.

- **Set Required Responses:** set a designated number of responses required to approve (or decline) a request. For example, you may have a Panel with 5 members and any of these members can approve or decline requests, you can set the number of required responses to 2 meaning only 2 out of the 5 members are required to respond to the request.
- **Auto Approve Requests from me:** this setting allows any requests sent from the Panel owner to be auto approved, meaning only additional Panel members are required to approve or decline the request. Note: Responses can be change anytime.
- **Email Status Updates to Non-Members:** Keep these boxes ticked if you want non Panel members to get status updates when they send approval requests to a Panel email address.

- **Archive the Panel:** by selecting 'Yes' here and saving it removes this Panel and all associated requests from your main Dashboard view, you can still access an archived Panel and its requests by using the 'Archive' filter on the main Dashboard.
- **Remove Panel:** Good for removing test data and requests, use the Remove Panel to completely remove the particular Panel. Note; this will also remove all associated requests, you won't be able to re-use the Panel name and cannot be undone

Set Required Responses: 

Auto Approve requests from me? Yes No 

Allow Requests from Non-Members and Systems Yes No 

Email Status Updates to Non-Members Pending Approved Declined Overdue 

Default reminder after: Days Hours Activate 

Default deadline after: Days Hours Activate 

Archive this Panel (Also archive's all associated requests)? Yes No 

Save and Close Remove Panel 