

Helping SMEs save time, cut admin and work smarter with AI.

Purchase Approval Automation

From purchase request to approval, automatically

The Problem (Manual):

- Purchase requests handled through emails, spreadsheets or verbal approvals can be difficult to track.
- Requests can get delayed when it is unclear who needs to approve next.
- Requesters may need to chase managers or Finance for updates.
- Different purchase values require different levels of authorisation.
- Limited visibility makes it harder to maintain a clear audit trail.

The Solution (Automation):



Forms



Power Automate



SharePoint



Outlook

A structured automated purchase approval process:

- Employee submits a simple digital purchase request.
- The request is automatically recorded in a central tracking system.
- Approval is routed according to purchase value:
 - Up to £1,000: Manager approval
 - £1,000 to £5,000: Manager + Finance approval
 - Over £5,000: Manager + Finance + Director approval
- Each stage and decision is recorded centrally.
- The requester receives automatic updates throughout the approval process.
- Rejected requests are also captured, creating a clear record of the decision.

STEP 1

Employee submits request

STEP 2

Recorded centrally

STEP 3

Routed by purchase value

STEP 4

Approved or rejected, requester updated

Key Benefits:

- ✓ Saves time by removing manual chasing and forwarding.
- ✓ Improves financial control by ensuring the correct approval levels are followed.
- ✓ Provides greater visibility of where every request is in the process.
- ✓ Standardises the process across the business.
- ✓ Reduces human error through consistent automated routing.
- ✓ Creates a clear audit trail of requests and approval decisions.
- ✓ Keeps employees informed with automatic status notifications.
- ✓ Reduces administration for managers and Finance teams.

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