

# TRAJECTORY APPROVALS BUNDLE

Streamline Your Approval Process  
for Greater Efficiency and Control



## PRODUCT OVERVIEW

The Trajectory Approvals Bundle is a toolkit designed to streamline your organization's transaction approval processes.

By integrating the Approvals Bundle with your NetSuite account, you can effectively manage transaction oversight, save time, and ensure transactions move seamlessly through the appropriate approval workflows.

## CAPABILITIES

- **Standardize and extend the approval process to encompass nearly all transactional records** in NetSuite, including Journal Entries, Expenses, Time Entries, Purchase Orders, and Invoices, by implementing a unified, streamlined approach.
- **Tailor the approval process to meet your organization's specific needs**, including custom routing by subsidiary and business area. Manage complex scenarios by establishing clear approval hierarchies. This ensures that approvals follow the appropriate processes for distinct departments, such as HR and Procurement.
- **Multi-tiered approval process** that operates according to business rules, including tiered approvals based on amount thresholds.
- **Locking feature** that enables records to remain either editable or locked until the completion of the approval or rejection process.
- **Rejection reason** that provides a written explanation of the specific issue(s) that resulted in the decision to reject the record.
- **Approval routing audit trail** that maintains a record of all approvals and rejections associated with a specific transaction.



- **Mass approvals feature** that boosts productivity by allowing approval of multiple transactions simultaneously, drastically reducing the time spent on individual approvals.
- **Email approvals** that keep approvers updated with automated email notifications, allowing them to review transactions directly from their inbox without logging into NetSuite.
- **Backup approvers feature** that ensures continuity in transaction approvals by assigning backup approvers for team members who are out of the office, preventing any disruptions in workflow.
- **In-depth reporting** that facilitates informed decision-making via comprehensive reports that provide insights into transaction statuses, approval timelines, and overall workflow efficiency.



---

## WHY CHOOSE TRAJECTORY'S APPROVALS BUNDLE?

Optimize your organization's financial oversight and approval processes. The Trajectory Approvals Bundle simplifies complex workflows, eliminates bottlenecks, and provides the flexibility to meet the unique needs of your business.

Join the growing number of organizations that rely on the Approvals Bundle to streamline approvals and make decision-making faster and easier.



### Interested in Streamlining Your Transaction Approval Processes?

Contact us today to learn more about how the Approvals Bundle can enhance your organization's productivity.

info@trajectoryinc.com  
+1 (877) 738 1657

5473 Blair Rd.  
Suite 100, PMB 90706  
Dallas, TX 75231  
United States

