

Adding Steps to a Panel

This is a guide for adding steps or multi-steps to an existing Panel.

Prerequisites

This guide assumes that you have already set-up a Panel and that you now wish to add steps to it.

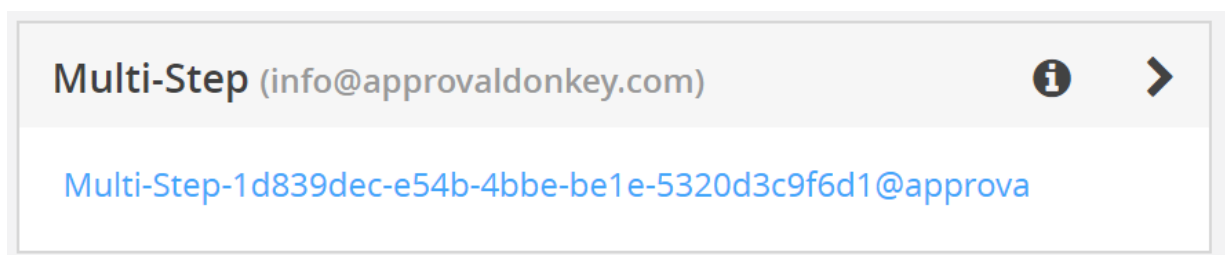
See the the guide *Adding a New Panel for instructions on how to do this.* <https://intercom.help/approvaldonkey/getting-started/adding-a-new-panel>)

General Points

- You can add a step to any Panel, new or existing
- You can add as many steps to a Panel as you require
- You can add as many people as you require to each step
- All approvers in a preceding step must approve the step before it moves onto the next group of approvers
- If a step is declined then the entire request is declined and no further requests are sent out
- Responses cannot be changed for multi-step Panels (Responses can be changed for standard group approvals)

Step by Step Guide

Firstly, from the Panel you want to add steps to select the > icon to show the member details.



From the member details screen select **'Add Member'**

Multi-Step

[Multi-Step-1d839dec-e54b-4bbe-be1e-5320d3c9f6d1@approvaldonkey.com](#)

+ Add Member - Remove Member

| | | | | |
|--------------|-------|-------------------------|----------|---------|
| Info Info | Owner | info@approvaldonkey.com | Approver | Active |
| First Member | | member@approval.com | Approver | Pending |

In the '**Add Approval Step**' field enter a name for the step you want to add and click **Save**.

| | | | |
|--------------|-------|----------|---------|
| Info Info | Owner | Approver | Active |
| First Member | | Approver | Pending |

Add Approval Step Save ⓘ

The step has been added now you need to add members to the step (the step is inactive until it has members added to it)

Second Member *

*

Enter Role...

Approver Reviewer

✓ Save and add another

✓ Save and Close

| | | | |
|--------------|-------|----------|---------|
| Info Info | Owner | Approver | Active |
| First Member | | Approver | Pending |

Approval Step 1

Click '**Save and add another**' or '**Save and Close**' and the member is added to the step.

Multi-Step

Multi-Step-1d839dec-e54b-4bbe-be1e-5320d3c9f6d1@approvaldonkey.com

✕ Cancel
➖ Remove Member

Enter Name... *

Enter Email... *

Enter Role...

Approver Reviewer

Choose Step ▼

✓ Save and add another
✓ Save and Close

| | | | |
|--------------|-------|----------|---------|
| Info Info | Owner | Approver | Active |
| First Member | | Approver | Pending |

Approval Step 1

| | | | |
|---------------|--|----------|---------|
| Second Member | | Approver | Pending |
|---------------|--|----------|---------|

Add Approval Step Save i

To add additional members just repeat the above steps. The only difference is you can choose what step to add a new member to via the drop down like below.

Panel (First Step) ▼

Choose Step

Panel (First Step) her

Approval Step 1

