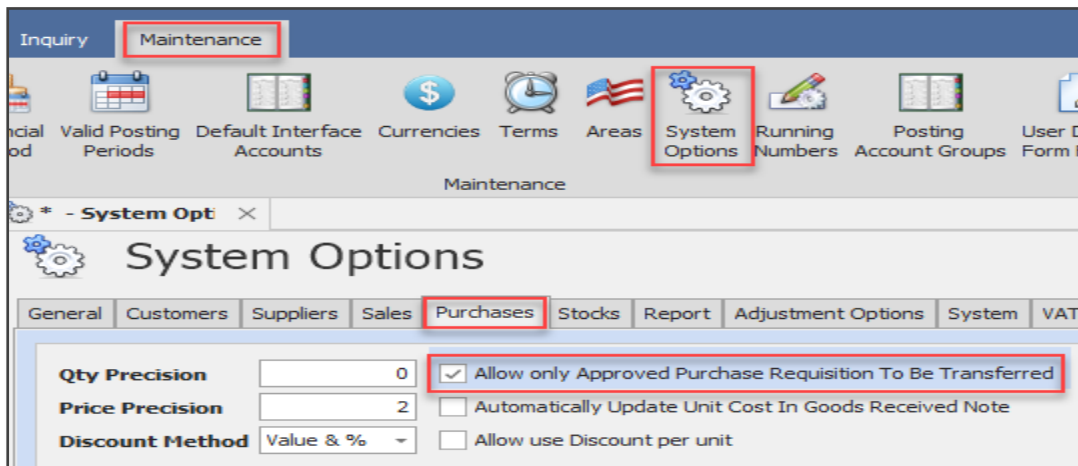




HOW TO SET UP PURCHASE REQUISITION APPROVAL

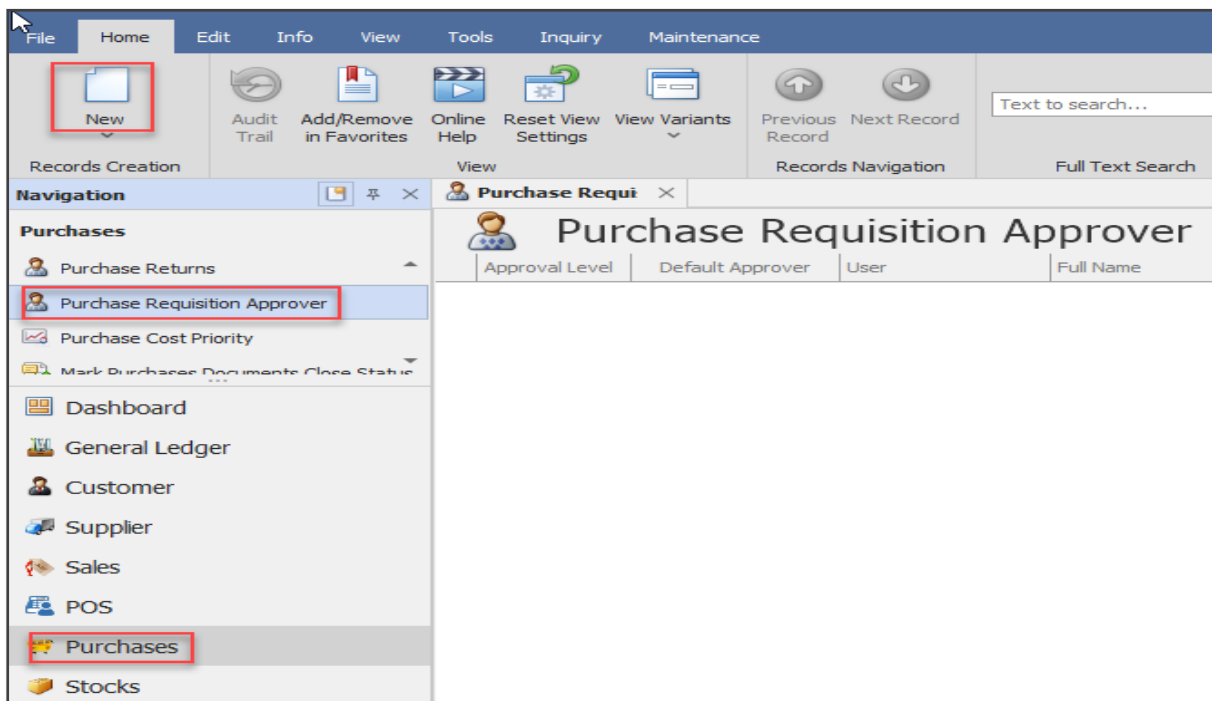
Purchase Requisition Approval is used when the management requires approval of purchase requisition before transferring to purchase order.

1. Go to **Maintenance > System Options > Purchases Tab** and tick '**Allow only Approved Purchase Requisition to be Transferred.**'



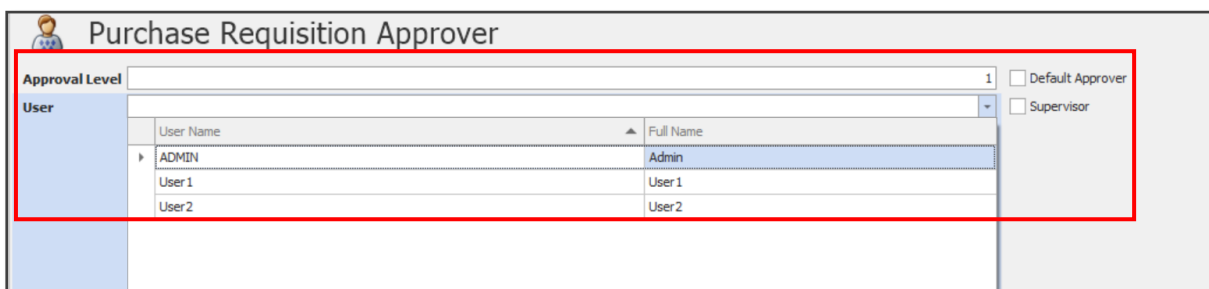
The screenshot shows the 'System Options' window with the 'Purchases' tab selected. The checkbox 'Allow only Approved Purchase Requisition To Be Transferred' is checked, and the 'Purchases' tab is also highlighted with a red box.

2. To assign/create Purchase Requisition Approver(s), go to **Purchases** and select **Purchase Requisition Approver** then click **New**.

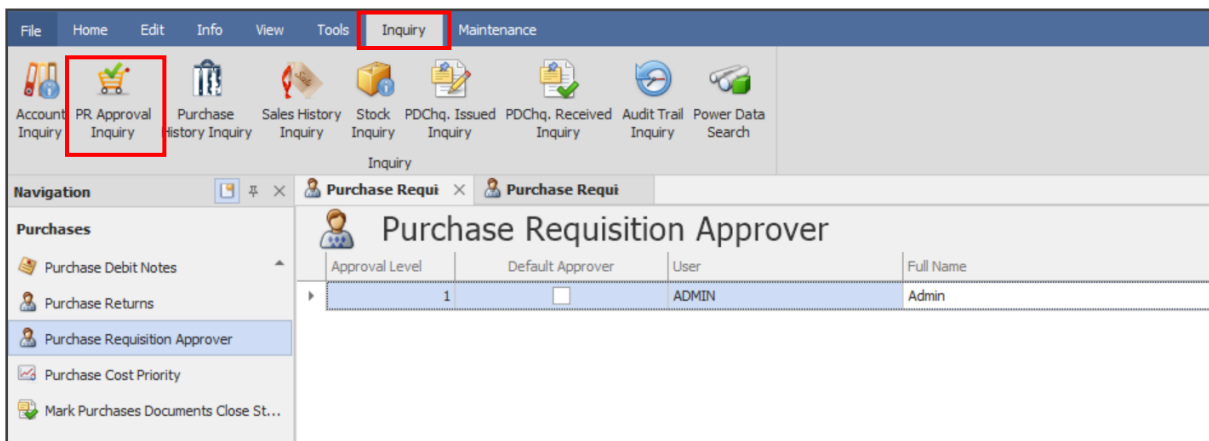


The screenshot shows the 'Purchase Requisition Approver' form. The 'New' button in the top toolbar is highlighted with a red box. In the left navigation pane, 'Purchase Requisition Approver' is selected under the 'Purchases' category. The main form area shows the 'Purchase Requisition Approver' form with fields for Approval Level, Default Approver, User, and Full Name.

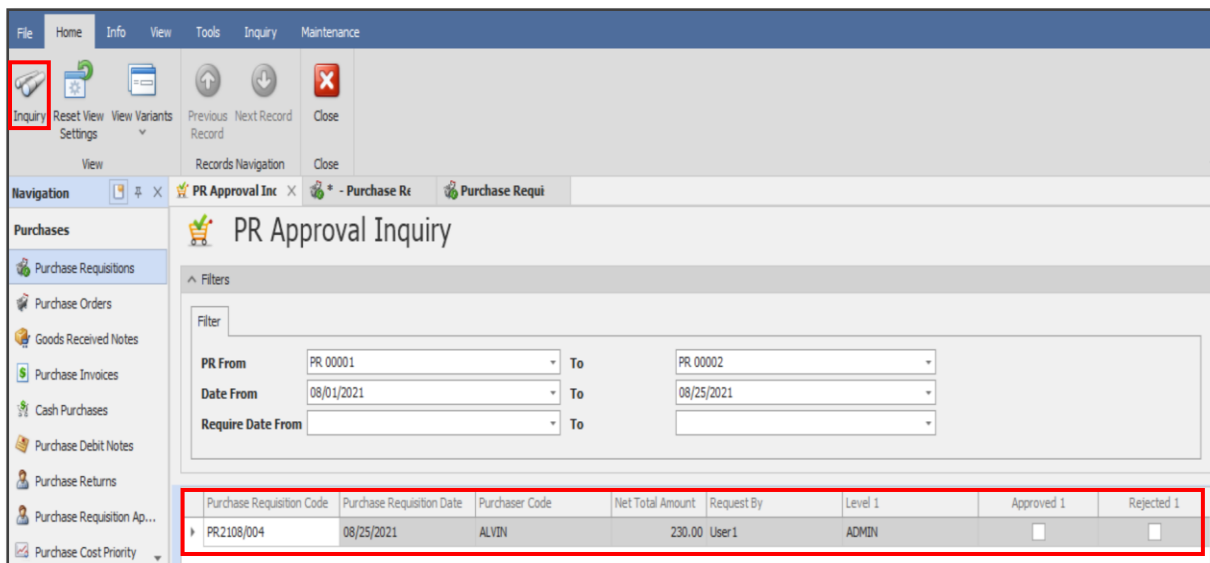
- Then key in the Approval Level. You will set the approval level based on the number of approvers.
 - o If 2 Approvers are required, set the Approval Level to:
 - 1st Approver (User 1) = Level 1
 - 2nd Approver (User 2) = Level 2
 - o If 1 Approver only is required, set the Approval Level to 1. Can have multiple Level 1 Approvers and any of them can approve the PR.
- Select the User/Approver from the dropdown list
- Tick 'Default Approver' if the user shall be the default approver
- Tick 'Supervisor' if applicable (To tag the approver as supervisor)
- Once done click the Save button



3. To approve the Purchase Requisition(s), go to **Inquiry** and select **PR Approval Inquiry**.

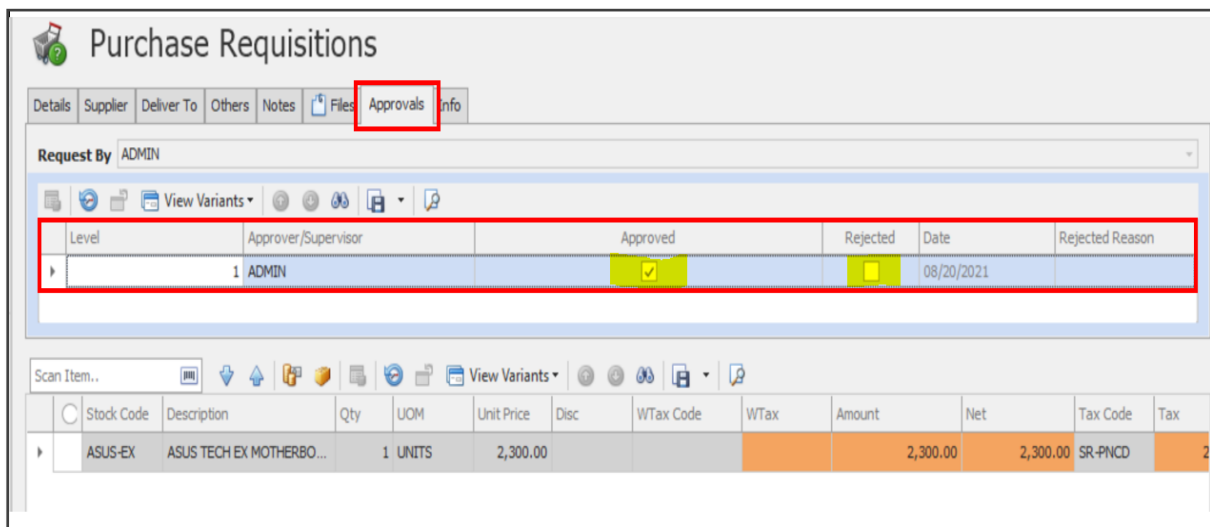


- Then click the **Inquiry** button to see the list of PRs for approval. Double-click the PR to open the actual document.



Purchase Requisition Code	Purchase Requisition Date	Purchaser Code	Net Total Amount	Request By	Level 1	Approved 1	Rejected 1
PR2108/004	08/25/2021	ALVIN	230.00	User1	ADMIN	<input type="checkbox"/>	<input type="checkbox"/>

- Click the **Approvals Tab** and tick the corresponding checkbox if the PR is Approved or Rejected then click **Save**.



Level	Approver/Supervisor	Approved	Rejected	Date	Rejected Reason
1	ADMIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/20/2021	

NOTE:

Should you need further assistance on this please send us an email to support@qne.com.ph or you may log a ticket via support.qne.com.ph