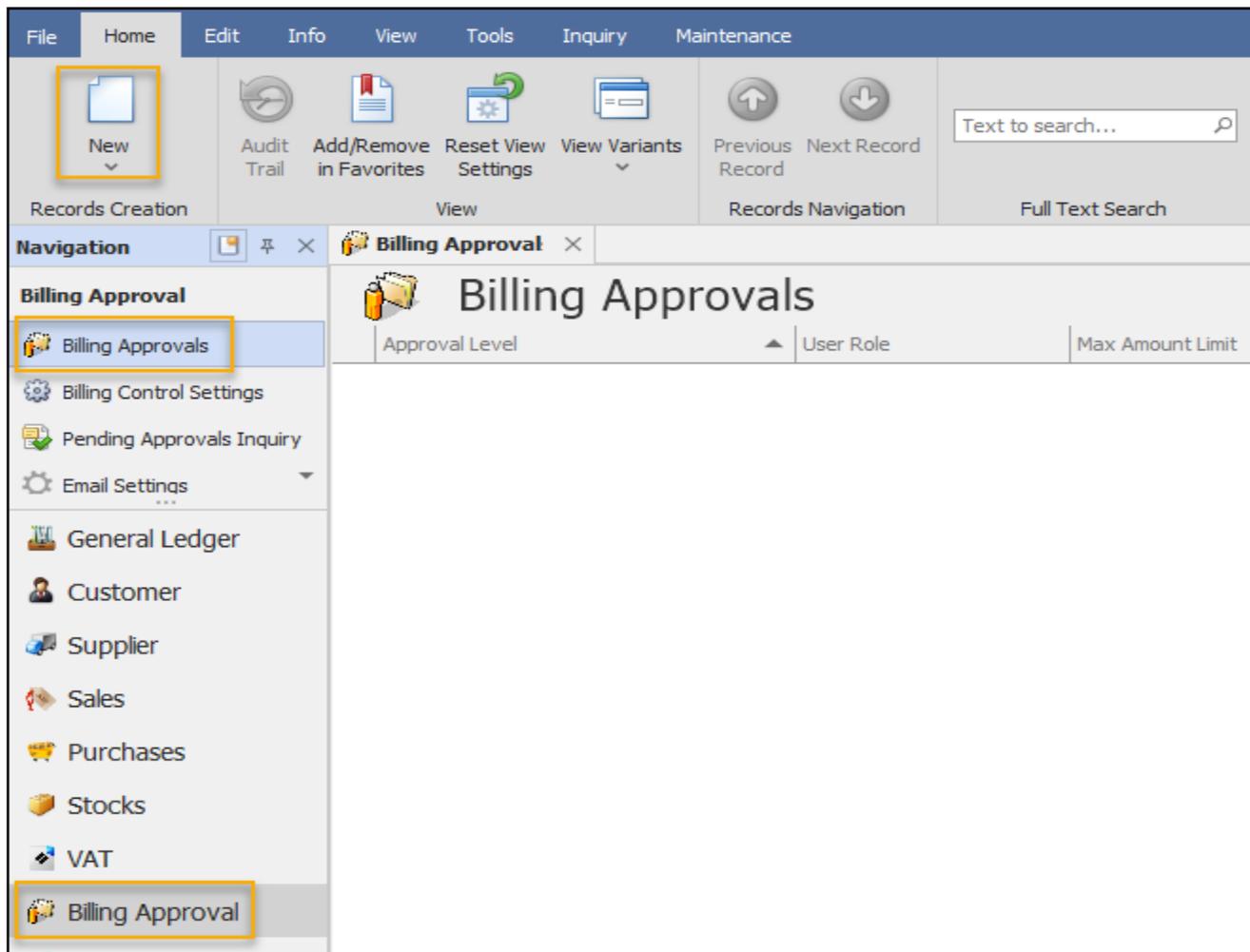




How to Set Up Billing Approval

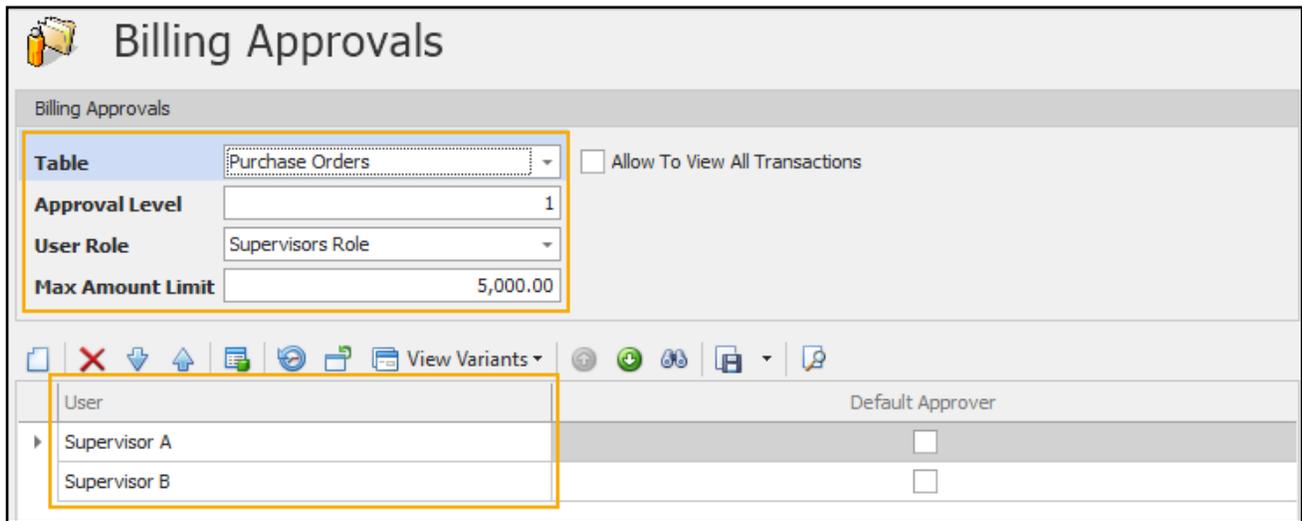
Billing Approval module enables the management to approve or reject created sales and purchases transactions. By using this process, transactions without management consent are avoided, and thus saves time when moving data throughout the organization.

1. Navigate to **Billing Approval > Billing Approvals**. Click the **New** button to create a Billing Approval.



The screenshot displays the QNE Billing Approval module interface. The top navigation bar includes tabs for File, Home, Edit, Info, View, Tools, Inquiry, and Maintenance. The Home tab is active, showing a 'New' button highlighted with a red box. Other buttons include Audit Trail, Add/Remove in Favorites, Reset View Settings, View Variants, Previous Record, and Next Record. A search box labeled 'Text to search...' is also present. The main content area is titled 'Billing Approvals' and features a table with columns for 'Approval Level', 'User Role', and 'Max Amount Limit'. The left sidebar contains a 'Navigation' menu with 'Billing Approvals' highlighted in blue, and a 'Billing Approval' button highlighted with a red box at the bottom.

2. Define the following.
 - a. **Table** - The transaction you wish to apply Billing Approval
 - b. **Approval Level** - The user's approval level (up to 4 levels)
 - c. **User Role** - The System Role that the user/approver belongs to
 - d. **Max Amount Limit** - The max amount that the approver can approve. If the amount exceeds the amount limit set here, the transaction will also require the approval of the next higher-level approver.
 - e. **User** - The approvers' User Name



Billing Approvals

Billing Approvals

Table Purchase Orders Allow To View All Transactions

Approval Level 1

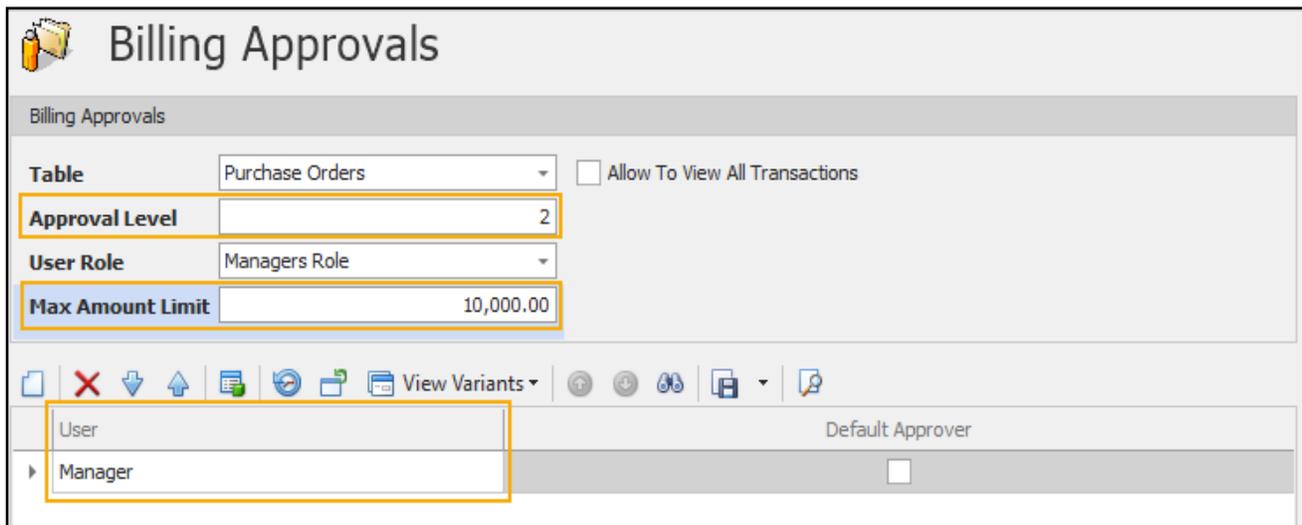
User Role Supervisors Role

Max Amount Limit 5,000.00

User

Supervisor A Default Approver

Supervisor B Default Approver



Billing Approvals

Billing Approvals

Table Purchase Orders Allow To View All Transactions

Approval Level 2

User Role Managers Role

Max Amount Limit 10,000.00

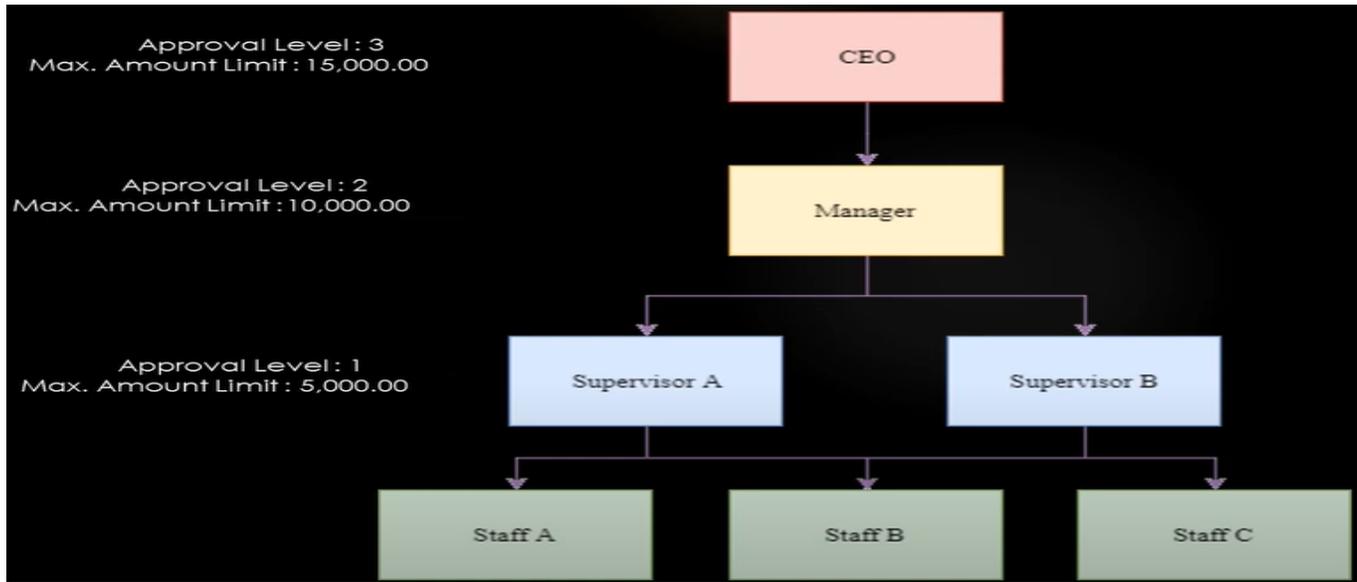
User

Manager Default Approver

Do the same steps to create higher-level approvers (same transaction table) and to create another Billing Approval (different transaction table).

More on Approval Level

Here is an example of multi-level approval.



And here are some scenarios.

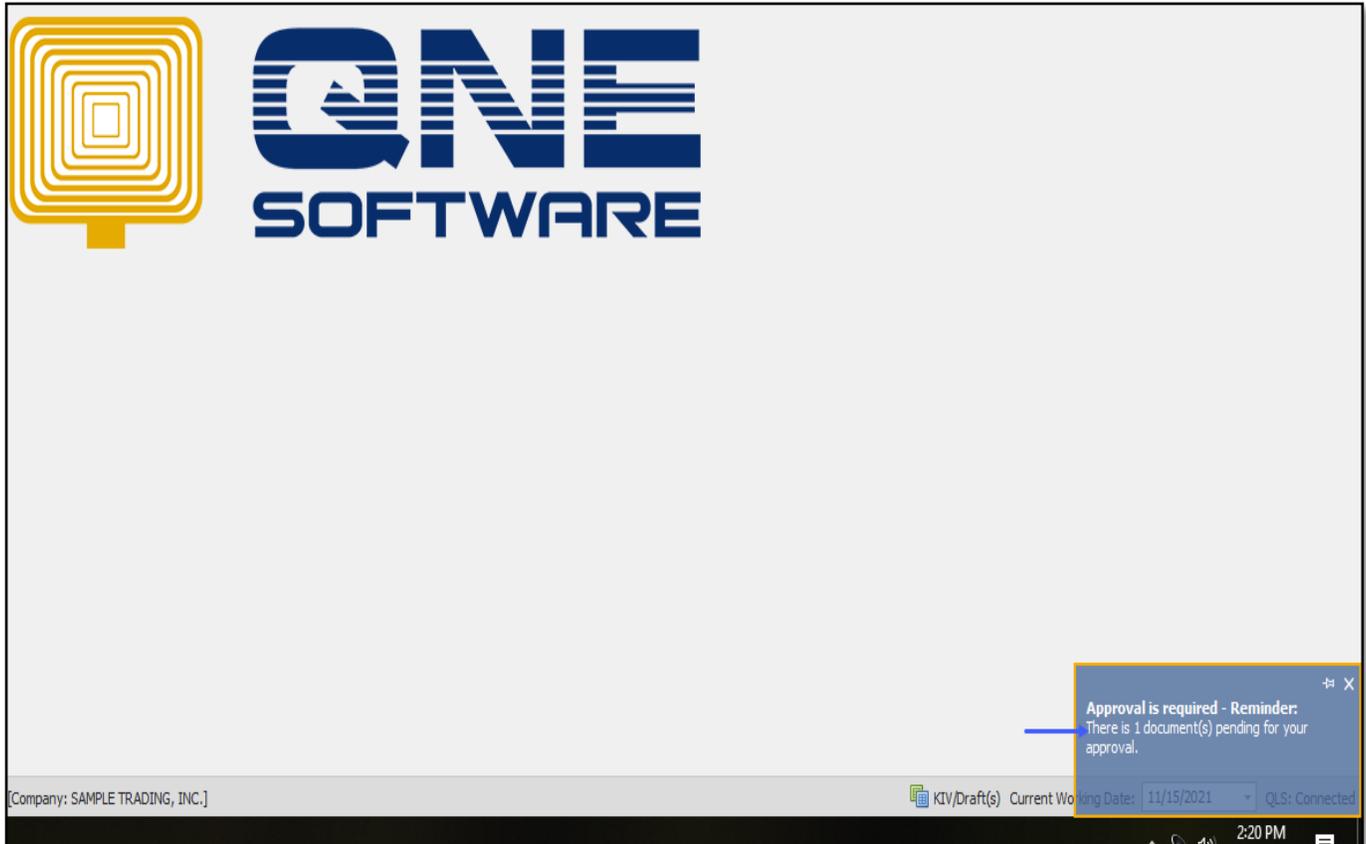
Scenario 1:

If the Staff User creates a Purchase Order amounting to $\leq 5,000.00$, it only requires approval from Level 1 Approvers, either Supervisor A or Supervisor B.

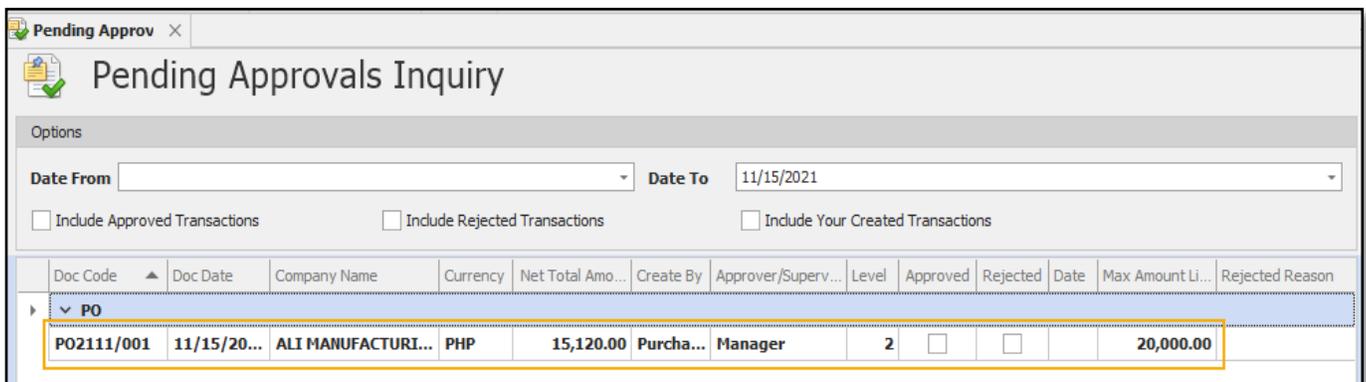
Scenario 2:

If the Staff User creates a Purchase Order amounting to $> 5,000.00$, it requires approval from both Level 1 (either Supervisor A or B) and Level 2 (Manager) Approvers.

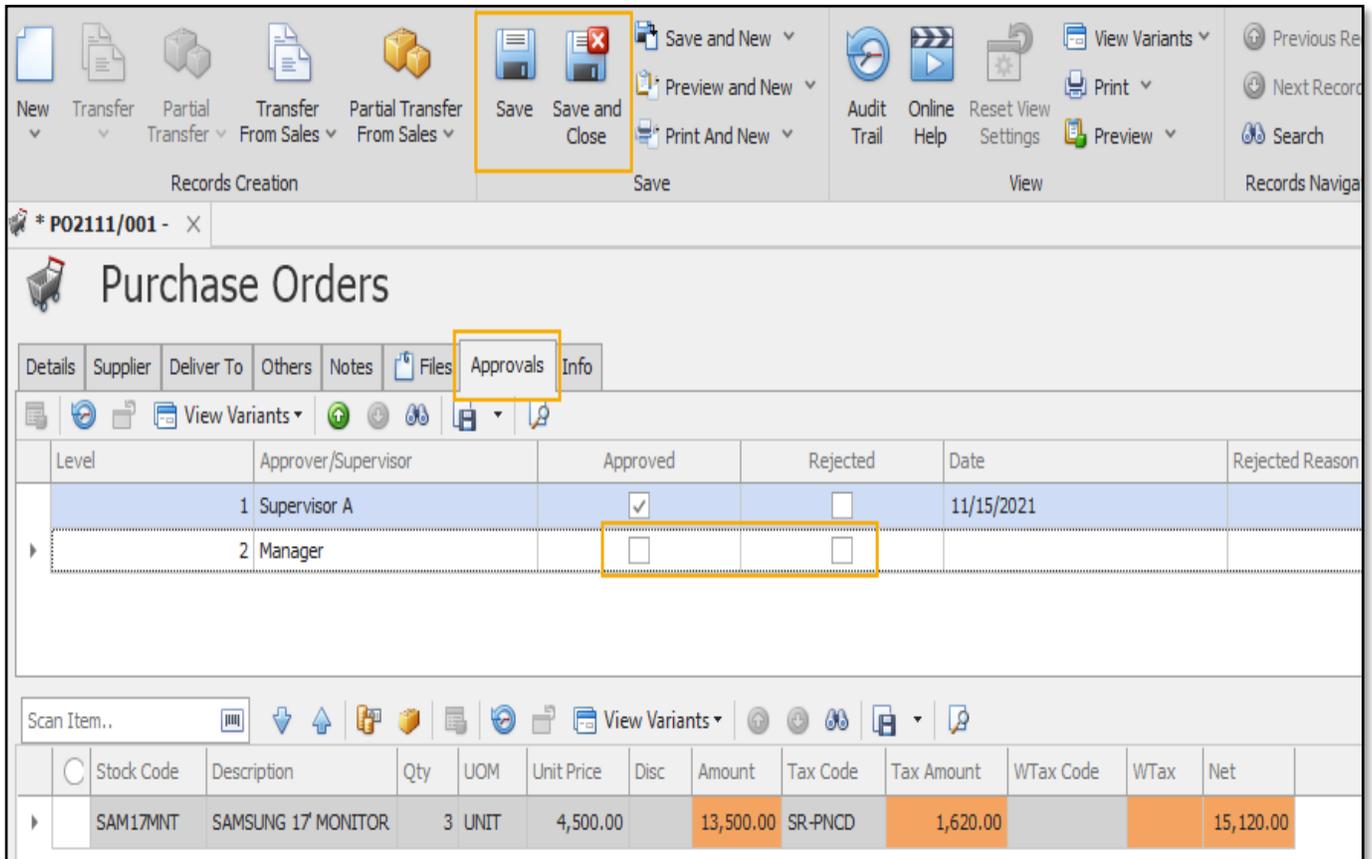
- To approve the transaction, when the Approver logs in to the system, a reminder will appear at the bottom-right corner of the screen.



- Click on the reminder and it will open the **Pending Approvals Inquiry** screen. Double-click the transaction to open the actual document.



5. Go to the **Approvals** tab. Tick the corresponding checkbox if Approved or Rejected and click Save.



The screenshot displays the 'Purchase Orders' window in the QNE software. The 'Approvals' tab is selected, showing a table with columns for Level, Approver/Supervisor, Approved, Rejected, Date, and Rejected Reason. The 'Save' button in the top ribbon is highlighted. Below the table, a 'Scan Item..' section shows a list of items with columns for Stock Code, Description, Qty, UOM, Unit Price, Disc, Amount, Tax Code, Tax Amount, WTax Code, WTax, and Net.

Level	Approver/Supervisor	Approved	Rejected	Date	Rejected Reason
1	Supervisor A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11/15/2021	
2	Manager	<input type="checkbox"/>	<input type="checkbox"/>		

Stock Code	Description	Qty	UOM	Unit Price	Disc	Amount	Tax Code	Tax Amount	WTax Code	WTax	Net
SAM17MNT	SAMSUNG 17 MONITOR	3	UNIT	4,500.00		13,500.00	SR-PNCD	1,620.00			15,120.00

Once the transaction (Purchase Order) is fully approved, it is now allowed to be transferred to the next document (e.g. Goods Received Note).



For further concerns regarding this matter, please contact support to assist you or create ticket thru this link <https://support.qne.com.ph>