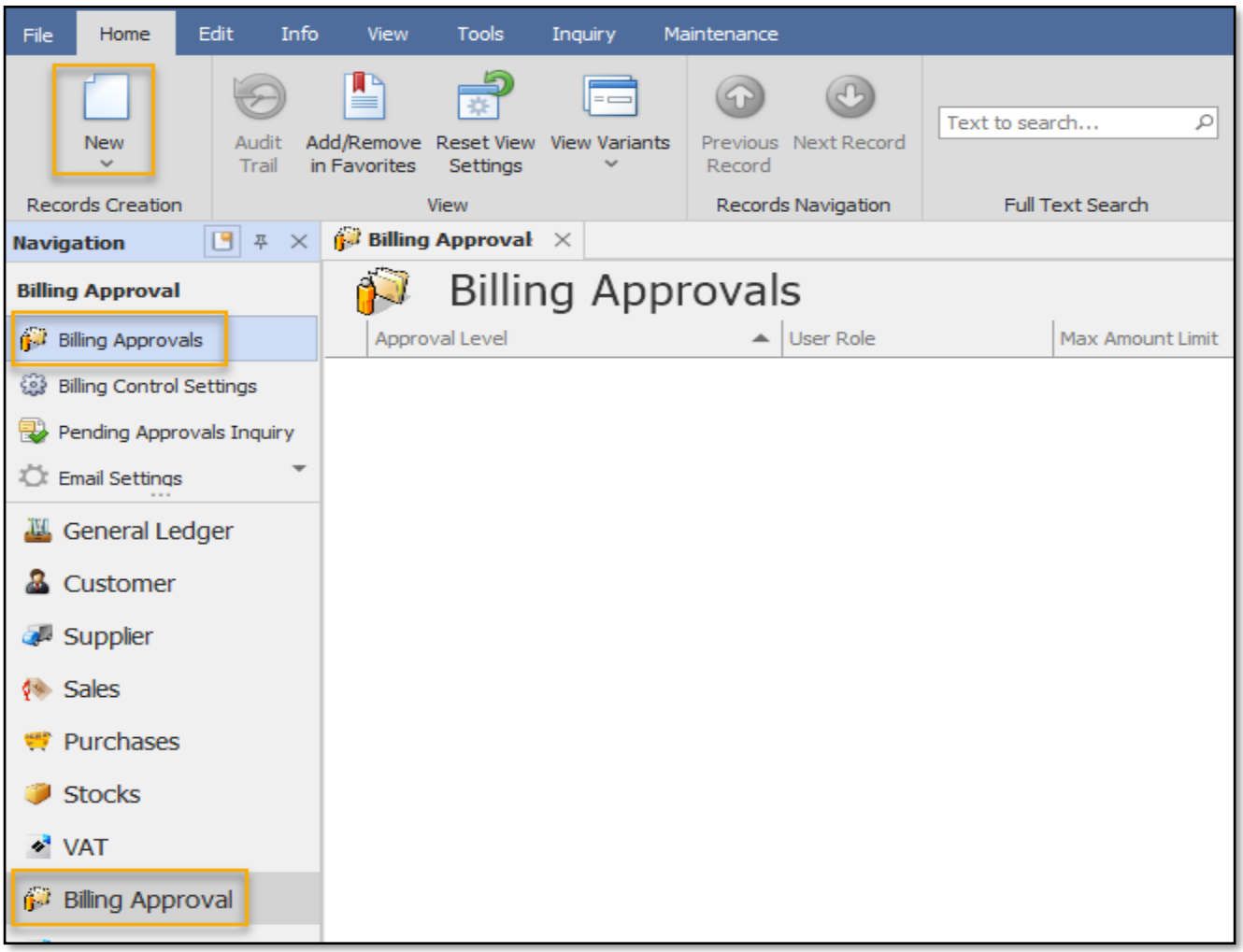
How to Set Up Billing Approval

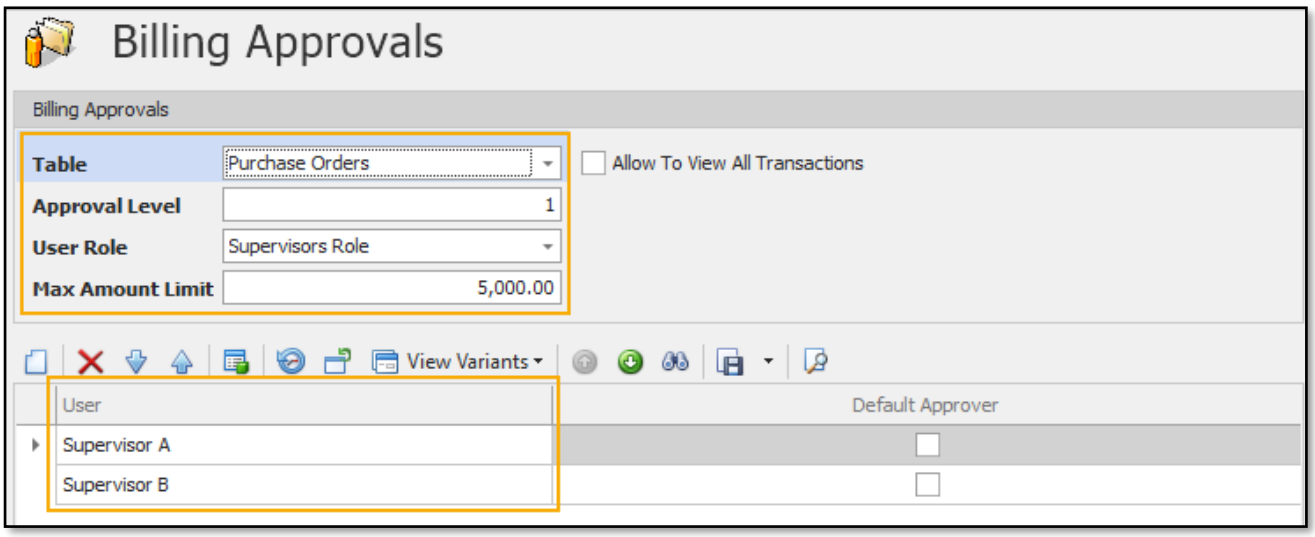
Billing Approval module enables the management to approve or reject created sales and purchases transactions. By using this process, transactions without management consent are avoided, and thus saves time when moving data throughout the organization.

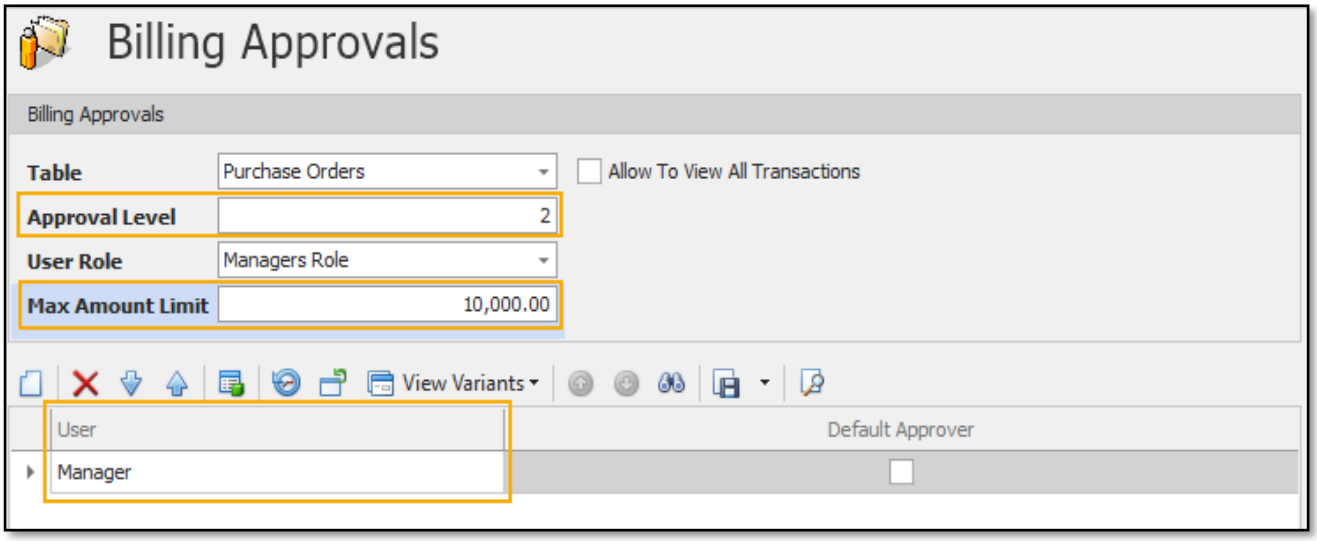
1. Navigate to ***Billing Approval*** > ***Billing Approvals***. Click the **New** button to create a Billing Approval.



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

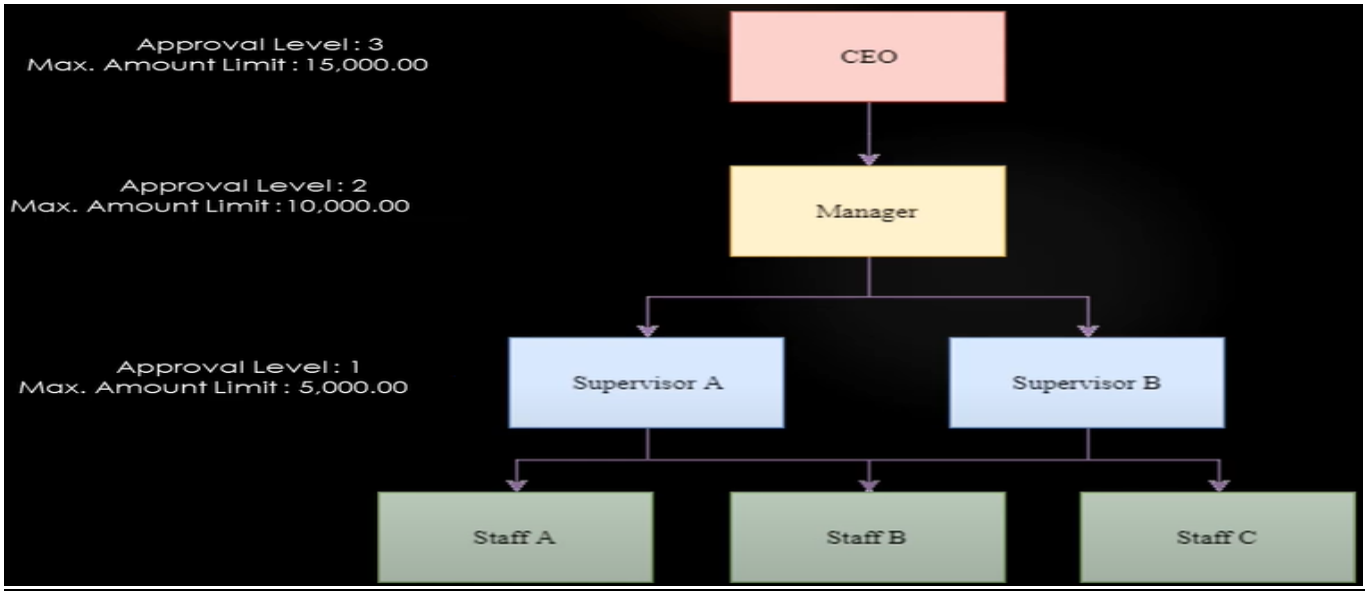




Do the same steps to create higher-level approvers (same transaction table) and to create another Billing Approval (different transaction table).

More on Approval Level

Here is an example of multi-level approval.



And here are some scenarios.

Scenario 1:

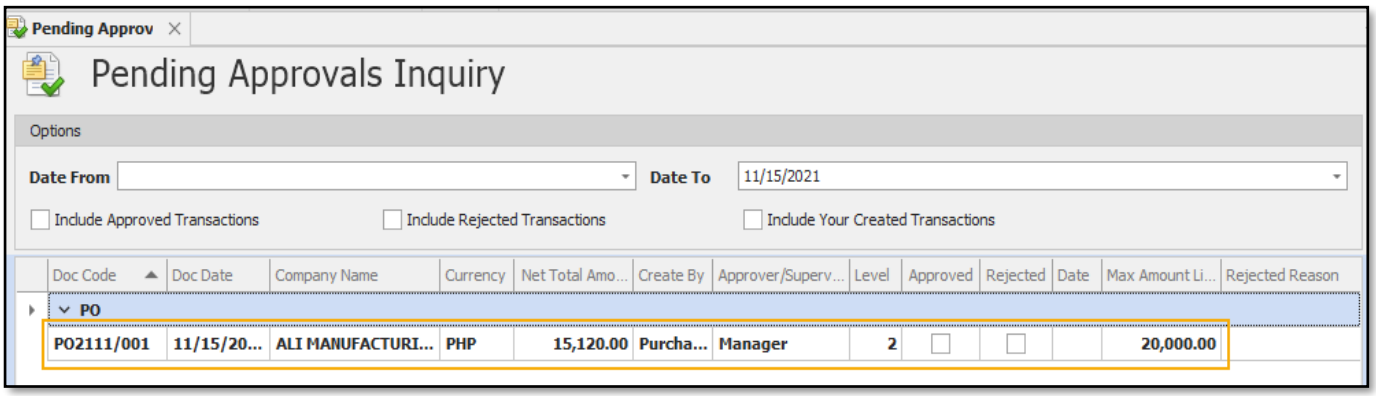
If the Staff User creates a Purchase Order amounting to ≤ 5,000.00, it only requires approval from Level 1 Approvers, either Supervisor A or Supervisor B.

Scenario 2:

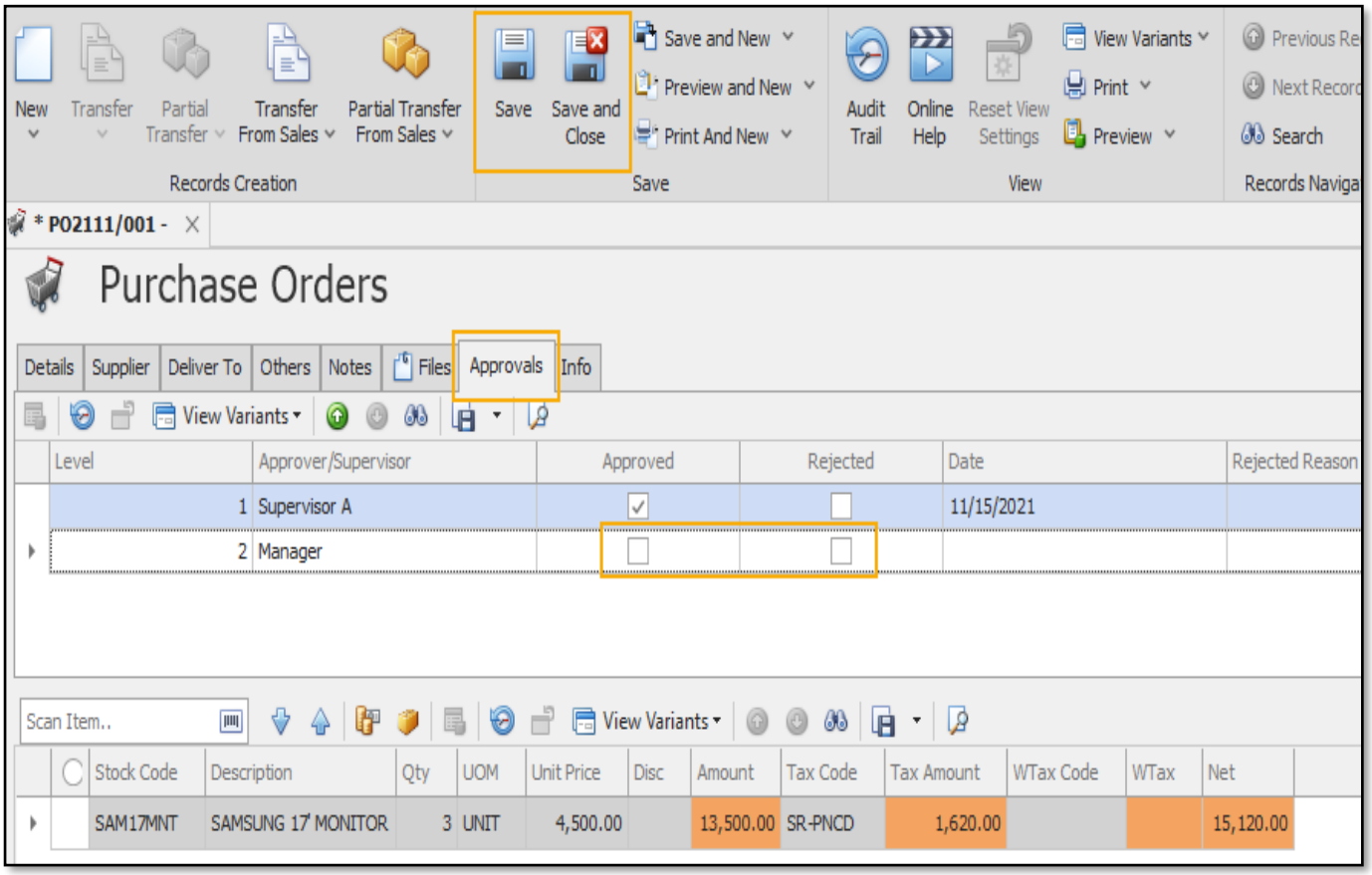
If the Staff User creates a Purchase Order amounting to > 5,000.00, it requires approval from both Level 1 (either Supervisor A or B) and Level 2 (Manager) Approvers.

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

4. 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.



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