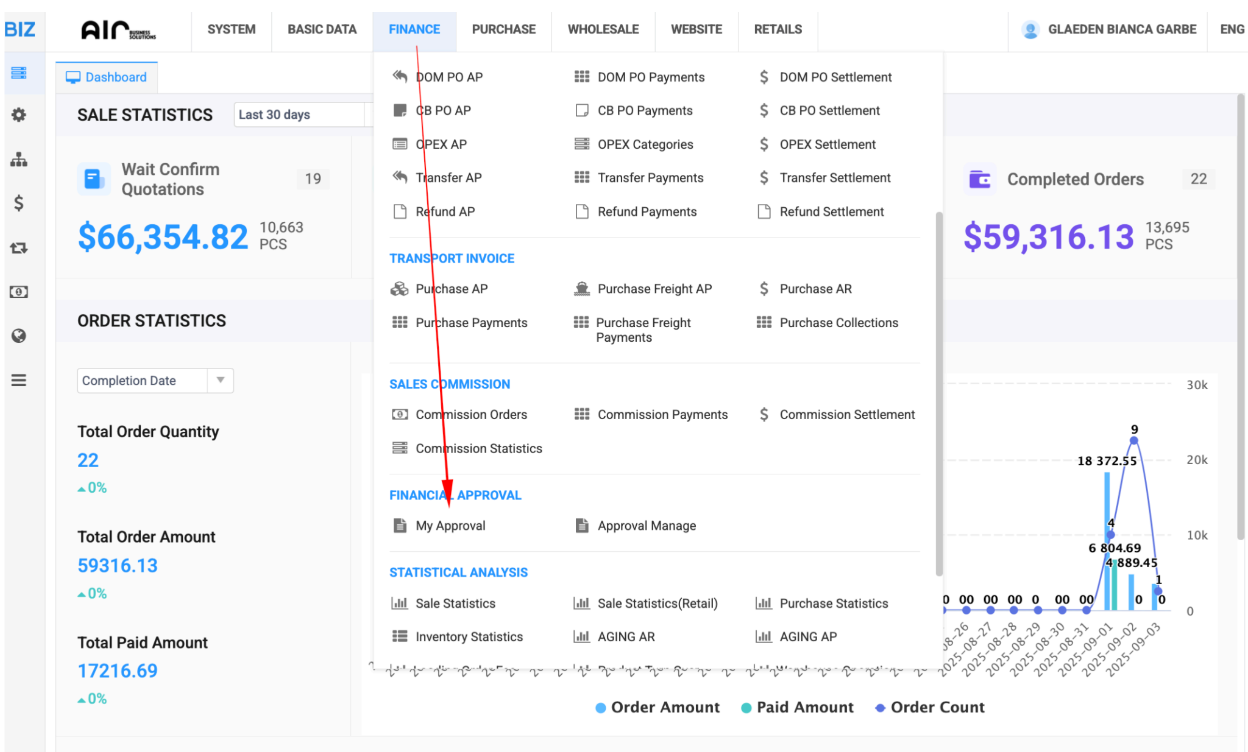
Finance - My Approval

The **My Approval Tab** is designed to manage, track, and approve financial procedures such as payment applications, travel expenses, and entertainment expenses. This tab allows users to view pending and completed procedures, ensure compliance with company policies, and streamline the approval process. In this article, we'll explore how to navigate the tab, the key fields available, and the different procedure applications you can create.

How to Navigate to the My Approval Tab

1. **Go to the Finance Tab**
    - Open the ERP system and locate the **Finance** tab in the main navigation menu.
    - Click on the **Finance Tab** to access financial management functions.

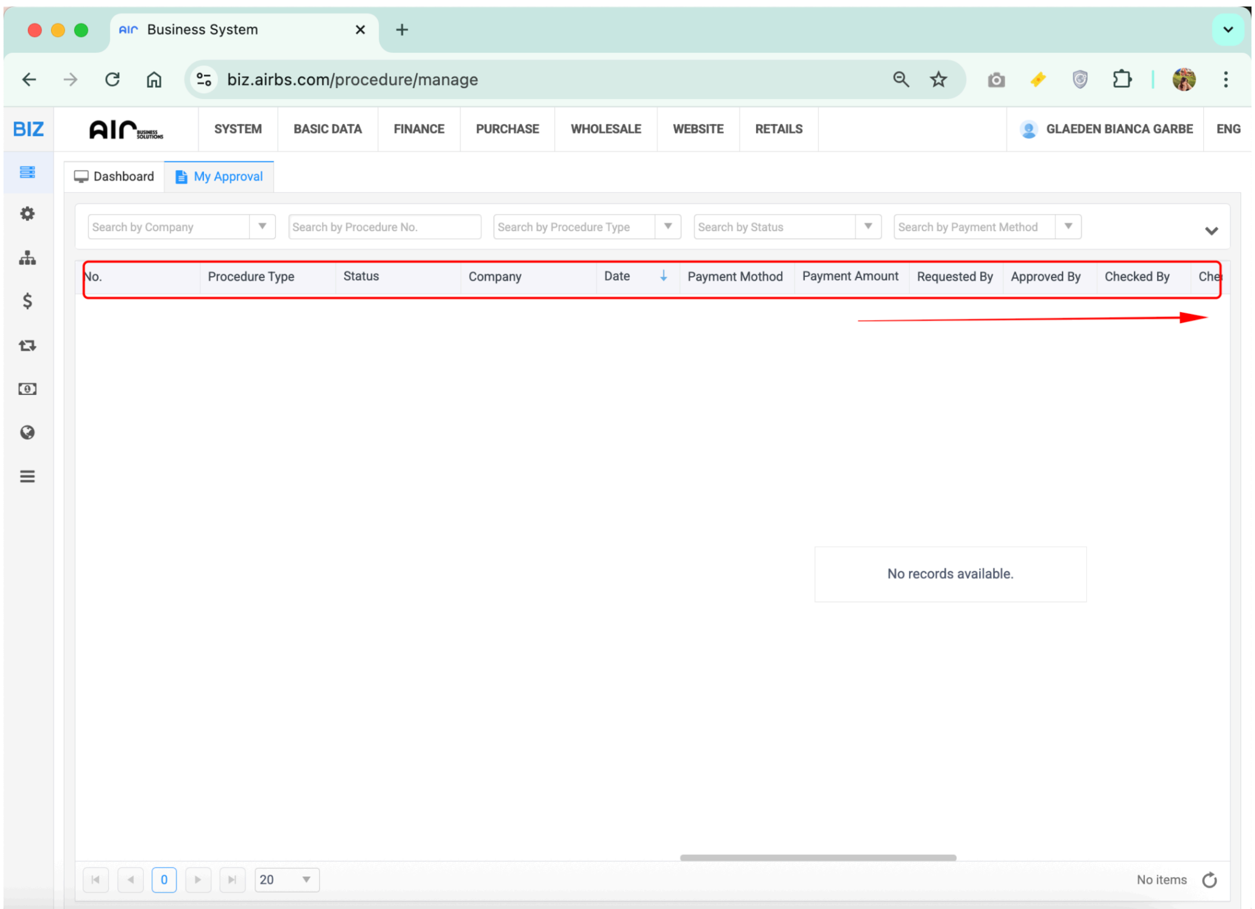


2. **Click on My Approval**

    - Under the Finance Tab, select **My Approval**.
    - This opens the approval dashboard where all procedure requests (Payment, Travel Expense, Entertainment Expense) can be managed.

Key Fields Under My Approval Tab

The **My Approval Tab** contains important fields for monitoring procedure applications and approvals:



1. **No.**
    - A unique identifier for each procedure application.
2. **Procedure Type**

    - Indicates the type of procedure (Payment, Travel Expense, Entertainment Expense).

3. **Status**
    - The current status of the procedure (e.g., Pending, Approved, Rejected).

4. **Company**
    - The company or department linked to the application.

5. **Date**
    - The date when the procedure was created or submitted.

6. **Payment Method**
    - Method of payment (Cash, Bank Transfer, Check, etc.).

7. **Payment Amount**
    - The requested payment or reimbursable amount.

8. **Requested By**
    - The employee who initiated the procedure request.

9. **Approved By**
    - The approver responsible for authorizing the procedure.

10. **Checked By**
    - The individual who reviewed and verified the details.

11. **Check Date / Check No. / Check Amount**
    - Details applicable if payment is processed via check.

12. **Prepared By**
    - The staff member who prepared the application details.

13. **Signature**

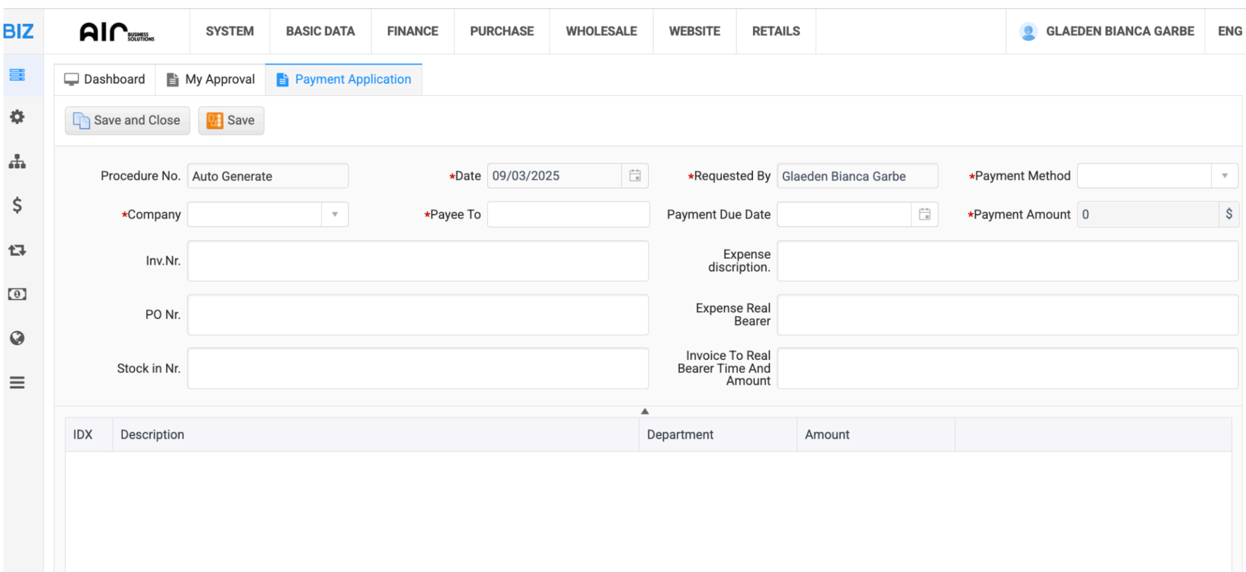
- Digital or manual signature confirming the procedure request.

Types of Procedure Applications

When adding a new procedure, the system provides three application options:

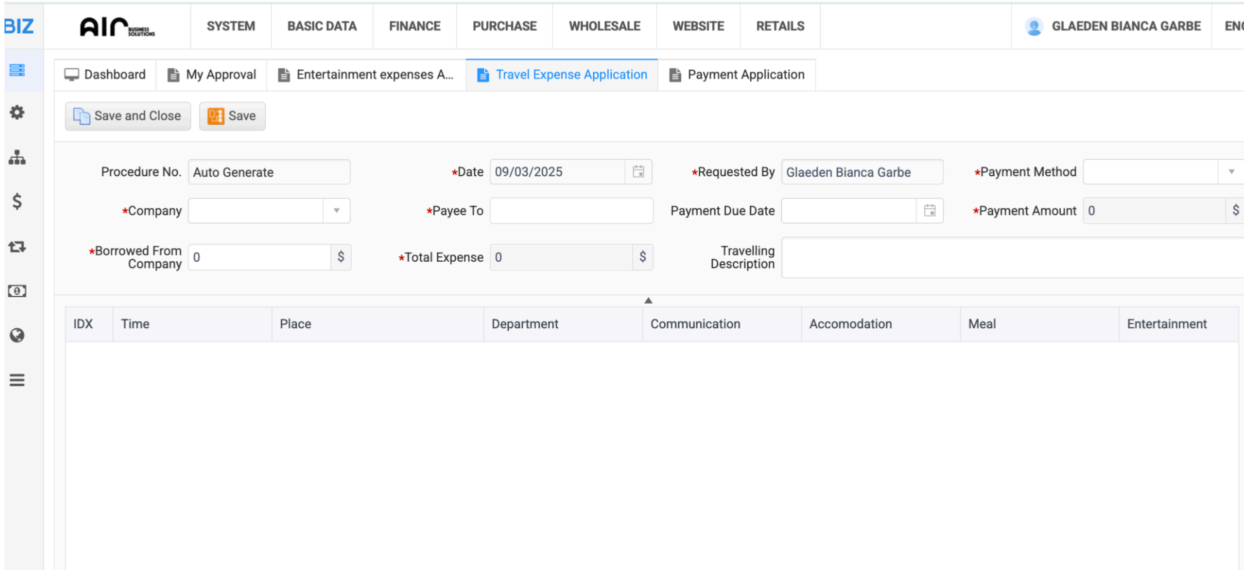
1. **Payment Application**

    - Used for payments to suppliers, vendors, or external parties.
    - Key Fields: Company, Payee To, Payment Method, Payment Amount, Invoice No., PO No., Expense Description.



2. **Travel Expense Application**

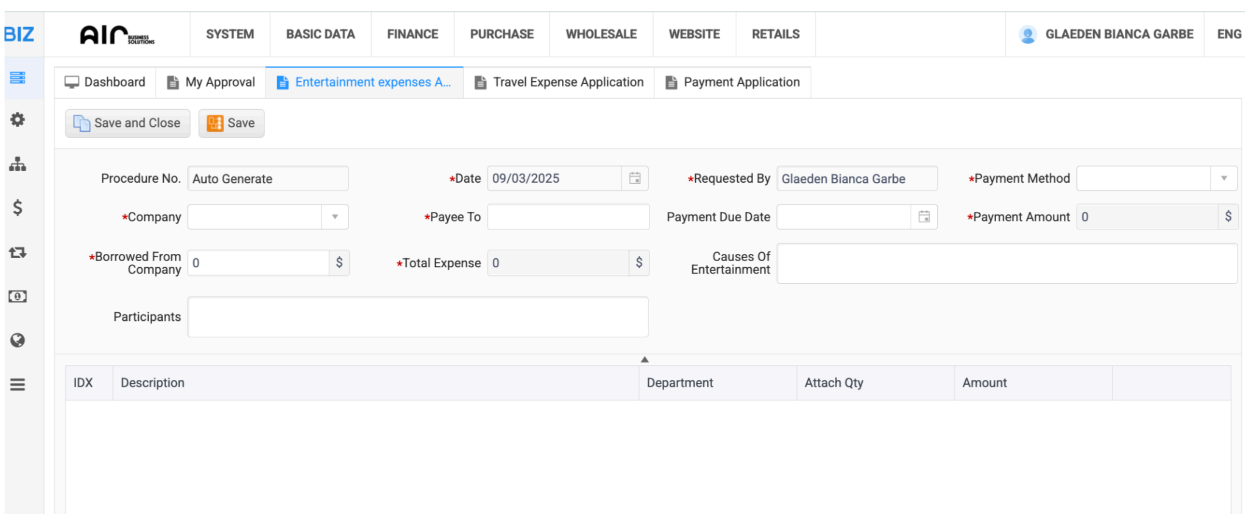
    - Used to request reimbursement or advance for travel-related expenses.
    - Key Fields: Company, Borrowed From Company, Payee To, Payment Amount, Total Expense, Travelling Description, detailed breakdown (Communication, Accommodation, Meal, Entertainment).



3. **Entertainment Expense Application**

    ○ Used to record and request approval for entertainment-related expenses.

    ○ Key Fields: Company, Borrowed From Company, Payee To, Payment Amount, Total Expense, Causes of Entertainment, Participants, Attachments.

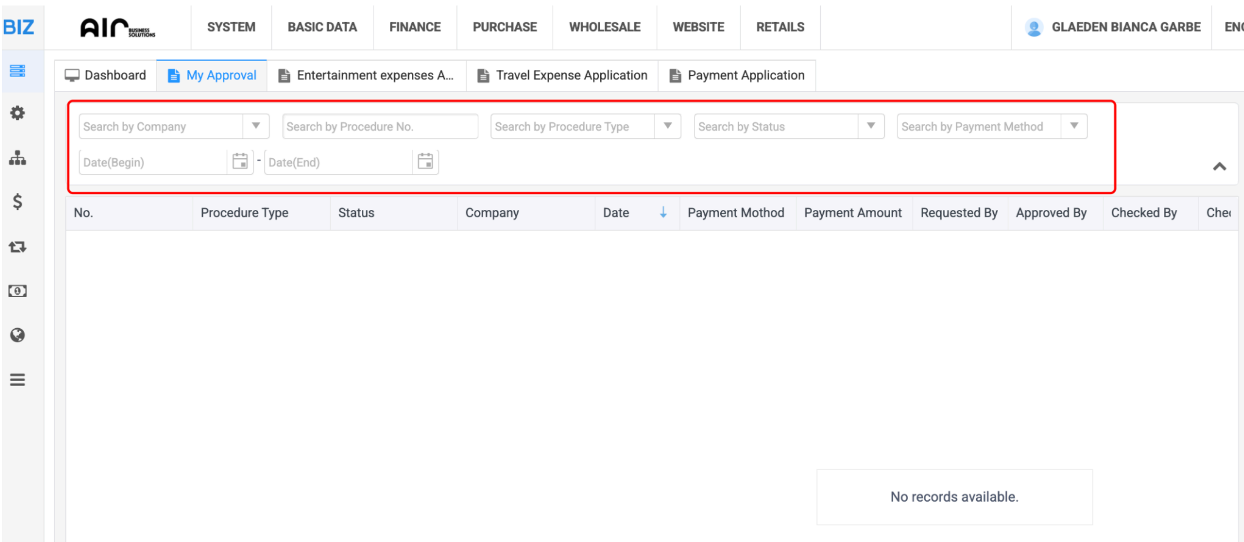


Search Options in the My Approval Tab

The **My Approval Tab** offers filters to quickly locate and manage procedure requests:

- **Search by Company** – Filter by the company linked to the request.

- **Search by Procedure No.** – Locate applications using their unique procedure reference number.
- **Search by Procedure Type** – Filter by Payment, Travel Expense, or Entertainment Expense.
- **Search by Status** – Narrow down by request status (Pending, Approved, Rejected).
- **Search by Payment Method** – Identify applications based on payment type (Cash, Check, Bank Transfer, etc.).
- **Search by Date Range** – Define start and end dates to review procedure requests within a specific period.



The **My Approval Tab** provides a centralized way to manage company expenses and payments, ensuring that all financial procedures are transparent, properly reviewed, and authorized before processing. By leveraging the structured fields and search functions, users can maintain accuracy, accountability, and efficiency in handling financial applications.