


Document Approvals

The document approvals (Sales module) process allows the user to managed the approval of sales documents, i.e. sales orders and sales invoices. This view helps approving authority in checking outgoing sales documents to customers and faster approval of sales documents.

Below are available actions for the user from “*Document Approvals*” :

 Approve sales documents

 View and search the status of sales documents’ approval

Document Approvals

Customer: < Select All >

Partner Group: < Select All >

Search

Year: Year 2016

From:

Till:

Document Type: All

Approve

Document Date	Document Type	Document #	Reference #	Customer #	Customer Name	Sent By	Approval Status	Total Amount
Jan 14, 2016	Sales Order	SO-16-010151	tres	4110.011/CO001	Cold Storage - HQ	Christina Soh	Approved	\$51.03
Feb 3, 2016	Sales Order	SO-16-020155	PO-01	4110.011/WA001	Watsons - HQ	Bruno Bianchi	Approved	\$54,927.02
Feb 16, 2016	Sales Order	SO-16-020176	PO-201602-123	4110.011/CO001	Cold Storage - HQ	Chris Wirianto	Pending	\$5149.80
Jun 17, 2016	Sales Order	SO-16-060219	test CRLimit - NIL	4110.011/SE002	7-11 - HQ	Chris Wirianto	Approved	\$518.49

Approval Status: < Select All >

Document Approvals List

Document To be Approved

Field Name	Explanation	Mandatory Information
Customer	Select a customer from the drop-down list	Y
Partner Group	Select a partner Group	Y
Year	Self-explanatory	Y
From	Date start	N
Till	Date end	N
Document Type:	Select type of documents to view	Y
Approval Status (list at the bottom of screen)	Select to show documents with status: Pending or Approved, or Select ALL	Y

Approve Sales Document

1. Select a customer from the “**Customer**” drop-down list on top left side of screen
2. Select document type from the “**Document Type**” drop-down list on top right side of screen
3. Enter search parameter to filter the result, i.e. type in document number to search for in the search engine text field box at the bottom left of the screen
4. Select a document from the list
5. Click “**Approve**” button on top right of screen to approve the document

View and Search for Status of Sales Document's Approval

1. Select a customer from the “**Customer**” drop-down list on top left side of screen
 2. Select document type from the “**Document Type**” drop-down list on top right side of screen
 3. Enter search parameter to filter the result, i.e. type in document number to search for in the search engine text field box at the bottom left of the screen.
 4. Result can be sorted alphabetically by clicking the fields' columns
 - 5, On “**Document To Be Approved**” tab click refresh button on top of screen to reload / refresh the results
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