


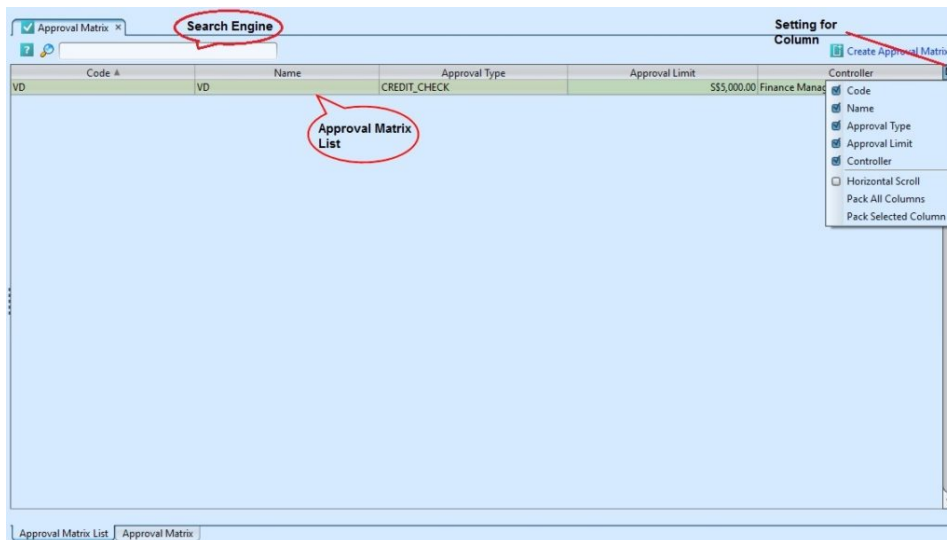


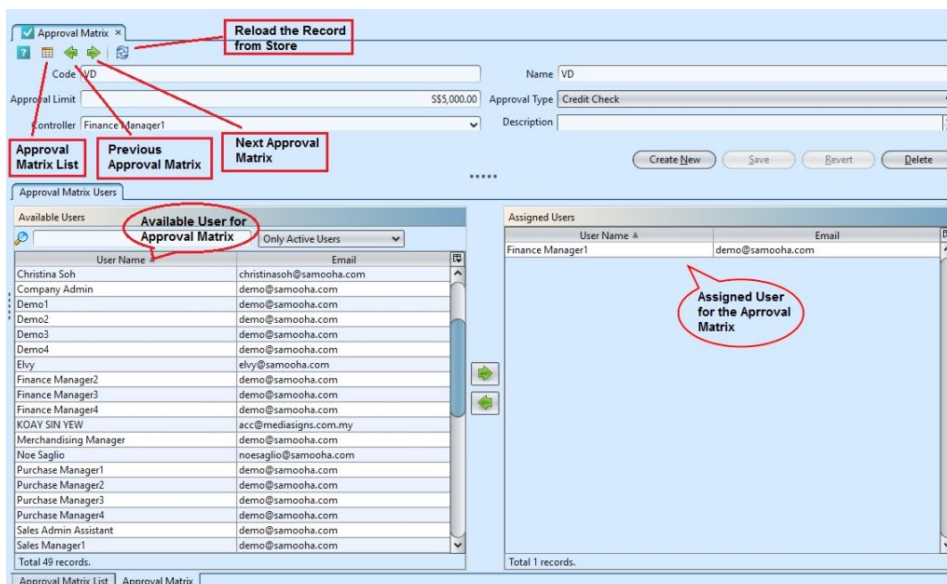
Approval Matrix

Approval Matrix View allows to define the approval limit for the user. User will require to get approval for amounts exceeding the limit. Below actions are available under **"Approval Matrix"**:

-  Create, edit and delete
-  Assign & un-assign user as approval
-  View the approval matrix



Approval Matrix View interface showing a table with columns: Code, Name, Approval Type, Approval Limit, and Controller. A red circle highlights the 'Approval Matrix List' button at the bottom left.



Approval Matrix View interface showing the 'Approval Matrix Users' section. It includes a list of 'Available Users' and a list of 'Assigned Users'. A red circle highlights the 'Available User for Approval Matrix' button. A red circle highlights the 'Assigned User for the Approval Matrix' button.

Field Name

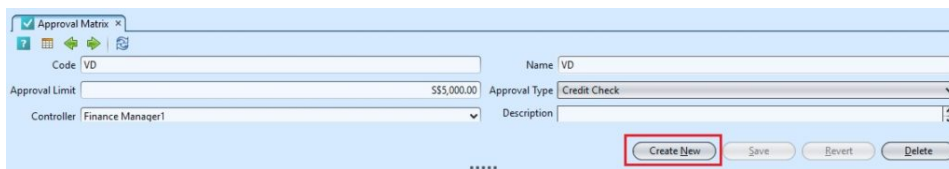
Description

Mandatory Information

Code	Custom code of the approval matrix	Y
Name	Name of the approval matrix.	Y
Approval Limit	The maximum amount for the approval	Y
Approval Type	Type of approval	Y
Controller	Final decision maker	Y
Description	Description	N



Create Approval Matrix:

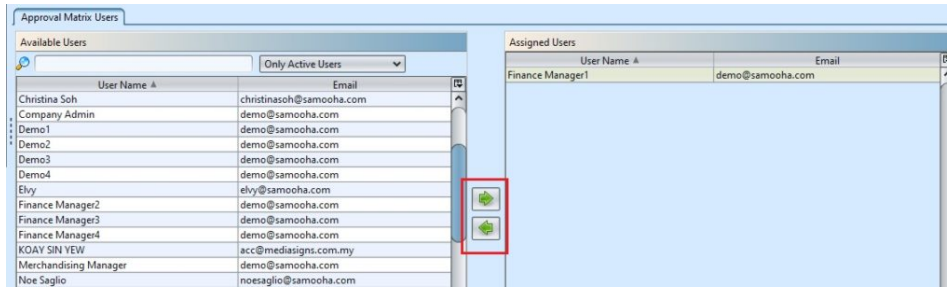
1. Click on **“Create New”** at the top of the screen



2. Fill up the information on top half of screen.
3. Click on the **“Revert”** button to undo changes.
4. Click on the **“Save”** button

Assign & Un-Assign User as Approval

1. Double click on an approval matrix on **“Approval Matrix List”** tab, it will show the details on **“Approval Matrix”** tab
2. Select a user name from the **“Available Users”** list and click on the “  ” button to assign the user as approval.
3. Select a user name from the **“Assigned Users”** list and click on “  ” to unassign the user.

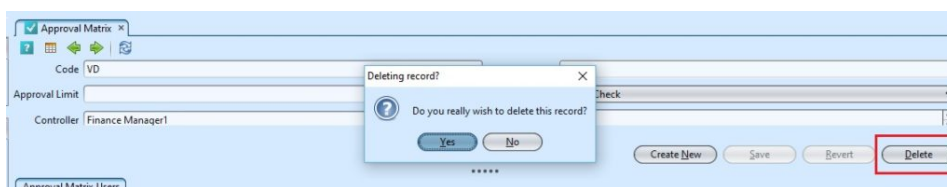


Modify Approval Matrix:

1. Double click on an approval matrix to modify on **"Approval Matrix List"** tab, it will show the details on **"Approval Matrix"** tab
2. Update the information required
3. Click on the **"Revert"** button to undo changes.
4. Click on the **"Save"** button to confirm the changes

Delete Approval Matrix:

1. Select the approval matrix user wants to delete in the approval matrix list and double click on the mouse, it will open the approval matrix details
2. Click on **"Delete"** button at the bottom of screen
3. Click on **"Yes"** button on the pop-up window to confirm category deletion



***Note:** Deletion of an approval matrix is possible only if no transactions used the transaction.

