Approvals

In this dynamic world, the best way to control is to limit the approvals levels. Samooha Project Management Module allows to restrict users up to certain progress to be later checked by senior management and approve the transaction.

The Approvals (Project module) process allows the user to manage the approval of project documents, i.e. purchase orders and proforma invoices. This view helps approving authority in checking project documents transactions and faster approval of project documents.

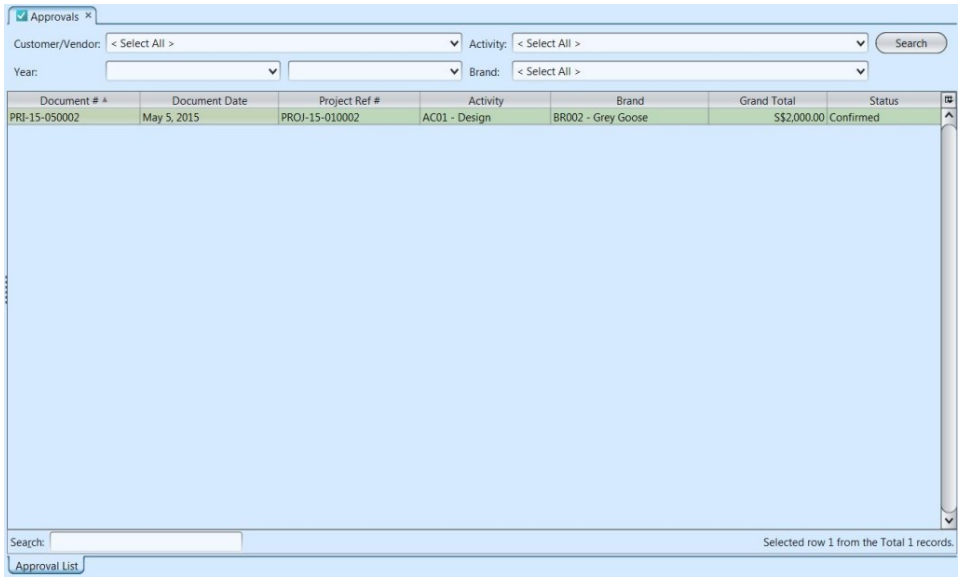
For example: Mr. Junior has requested a purchase order but he may not have authority to confirm the purchase order. He will request Mr. Senior to confirm the order. Once Mr. Senior confirmed the order, it has to be approved by Mr. Approver (Mr. Approver may be a finance manager).

"***Approval List***" tab will show all the documents appearing for approval, therefore for a quick identification, user can refer to the document code, e.g; PPI means proforma purchase invoice and PRI means project sales invoice etc. Please refer to "***Organization – (Masters) Document Sequence***" for complete list of the documents' codes.

NOTE: Only documents that need approvals will be listed in "***Approvals***" view. Once a document is approved, it will not be shown under the "***Approvals***" view anymore.

Below are available actions for the user from ***"Approvals"*** :

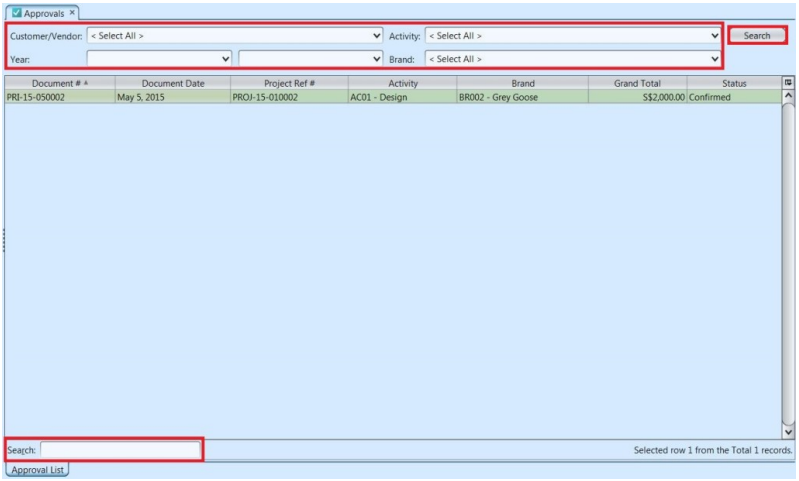
- Approve documents
- View details of document to be approve



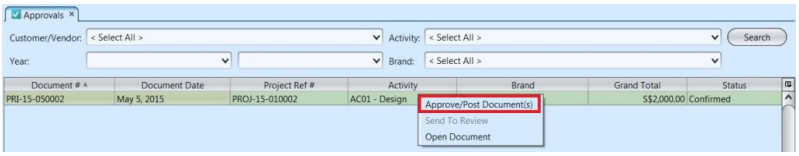
Field Name	Explanation	Mandatory Information
Customer/Vendor	Select a customer or vendor from the drop-down list	N
Activity	Select an activity	N
Year	Select start and / or end dates	N
Brand	Select a brand	N
Document #	Documents code / number	Y
Document Date	Date of the document	Y
Project Ref #	Reference code / number to the project document	Y
Activity	Type of activity of the project	Y
Brand	Brand of customer's of the project	Y
Grand Total	Value of the document to be approve	Y
Status	Status of the document	Y

Approve Documents

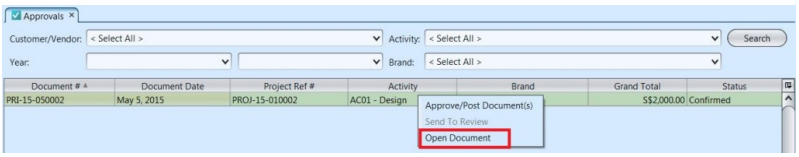
1. To filter the approvals list of document, select or type in search parameter in the drop-down list on top of the screen. For example enter customer or vendor name in the "***Customer/Vendor***" drop-down list on top left side of screen. Click "***Search***" button to refresh the list with the entered search parameters
2. Enter search parameter to filter the result, i.e. type in project reference number to search for in the search engine text field box at the bottom left of the screen



3. Select a document from the list
4. Right click on the document, it will pop up options for the document selected. Select “***Approve/Post Document(s)***” option to approve the document



View Details of Document to be Approve

1. To filter the approvals list of document, select or type in search parameter in the drop-down list on top of the screen. For example enter customer or vendor name in the “***Customer/Vendor***” drop-down list on top left side of screen. Click “***Search***” button to refresh the list with the entered search parameters
2. Enter search parameter to filter the result, i.e. type in project reference number to search for in the search engine text field box at the bottom left of the screen
3. Result can be sorted alphabetically by clicking the fields’ columns
4. Select a document from the list
5. Right click on the document, it will pop up

options for the document selected.
Select “***Open Document***” option to open the document details