

Voucher Staging Entries

CuteOffice provides finance voucher staging feature if client company wants to apply approve workflow for voucher entries. Finance vouchers entered in finance module in Voucher Staging Entries menu will be moved into financial transactions only after vouchers are approved. The vouchers will not be reflected in any financial reports or the balances will not be affected until the vouchers are approved.

Enable Finance Approval Option


Step1: To enable Approval Option to Accounts at Company Level

1. In Cute Office, navigate to Admin module, click Company menu and click  edit icon in selected company.

 edit icon in selected company.

2. Navigate to **Setting** page, search for setting configuration name **Finance - Approval**

option for Account Vouchers, 

3. Click  edit icon, change setting Value as **true** (Note: by default the value is false)



4. Click Save to save setting for finance approval.

Step 2: Enable Permission to View Approval Option & Staging Menu's at User Level

1. In Cute Office, navigate to Admin module, click Users menu and click



edit icon in selected user.

2. Navigate to Permissions tab. To view **Save & Approve Button** in Voucher Entry screens and to view Voucher Staging Menu, in user's permission page, enable below Read & Write permissions (click filter and filter "approvalstaging").
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3. Click Save to save permissions.

If finance approval functionality is enabled through Step 1 at the company level and Step 2 at the User level. All Voucher Entry screens will show **Save To Staging Button** by default

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Step 3: Approve the Staging Vouchers

Once voucher entries are saved to staging, user with permission to approve staging voucher entries can review all staging vouchers in Voucher Staging Entries menu as below. Click to review specific vouchers and click Approve button to approve. After approval, vouchers will be integrated to financial transactions.

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