Approve an Advance

Last Modified on 02/03/2021 11:56 am GMT

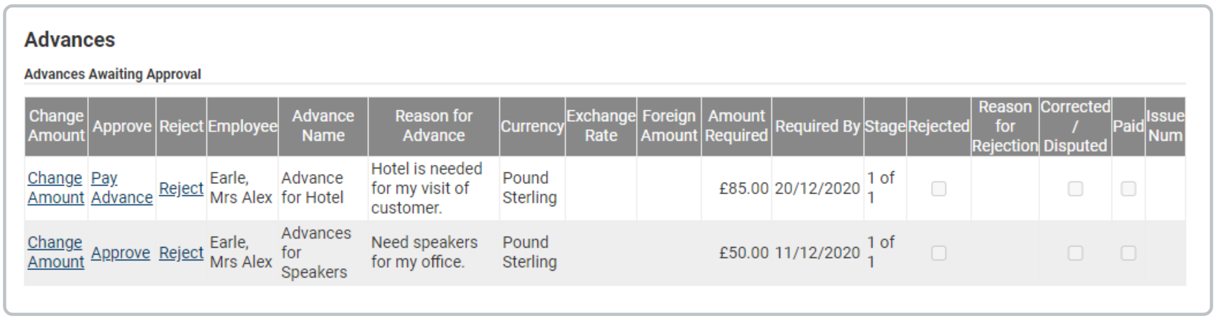
Permissions

You will require the following permissions:

- Advances set within your Access Role
- To be an approver within a Signoff Group

1. Navigate from the **Home** page to **Advances**. The Advances page is split into two sections; 'Advances Awaiting Approval' and 'Active Advances'.

2. Any advances that have been requested will appear in the 'Awaiting Approval' section. Select one of the following actions against the advance:



Advances

Advances Awaiting Approval

Change Amount	Approve	Reject	Employee	Advance Name	Reason for Advance	Currency	Exchange Rate	Foreign Amount	Amount Required	Required By	Stage	Rejected	Reason for Rejection	Corrected / Disputed	Paid	Issue Num
Change Amount	Pay Advance	Reject	Earle, Mrs Alex	Advance for Hotel	Hotel is needed for my visit of customer.	Pound Sterling			£85.00	20/12/2020	1 of 1	☐		☐	☐	
Change Amount	Approve	Reject	Earle, Mrs Alex	Advances for Speakers	Need speakers for my office.	Pound Sterling			£50.00	11/12/2020	1 of 1	☐		☐	☐	

Option	Description
Change Amount	Click **Change Amount** to modify the amount of the advance and click **Save** to confirm.
Approve	Click to approve the advance.
Reject	Click to deny the advance request, complete the **reason for rejection** field and click **Save** to confirm.

3. If you are the final stage of the Signoff Group for the request, upon clicking Approve, the option will change to Pay Advance. Click **Pay Advance** to release the funds to the claimant.

    - Alternatively, if you are not the final stage of the Signoff Group, upon clicking Approve, the request will disappear from the page and move to the next approver in the approval process.

4. Upon clicking **Pay Advance**, the request will move into **Active Advances** until the advance has been settled. The following Active Advance options are available:

Option	Description
Return Remainder	Click to retrieve any remaining balance on the advance.
Top-Up	Click to add extra funds to the balance.
Settle Advance	Click to close the advance.

5. After clicking **Settle Advance**, the advance will move to the Settled Advances page. Click **Settled Advances** to view all advances that have been previously settled.