

Approvals

Manage all employee requests and financial approvals seamlessly with TankhaPay's **Approvals Module**.

This module centralizes every approval workflow—from **vouchers and reimbursements to leave and travel requests**—giving HR and managers complete control and visibility.

The **Voucher section** allows you to handle both:

- **Debit entries** like meal vouchers, loan recoveries, and variable deductions
- **Credit entries** such as advances, loans, and additional income, with flexible installment and repayment tracking

The **Reimbursement feature** helps you track and manage employee claims month-wise or date-wise, ensuring accurate payouts.

With all requests available in one place, businesses can **review, approve, or reject applications efficiently**, ensuring transparency, faster decision-making, and better policy compliance.

TankhaPay's Approvals Module simplifies complex workflows, making workforce management structured, accountable, and hassle-free.

- [Overview Video](#)

Overview Video

<https://www.youtube.com/embed/pLTljCubr9Y>

Step-by-Step Tutorial Guide

Overview

This tutorial explains how to use the Approvals module in TankhaPay. The walkthrough covers:

- Accessing the Approvals module
- Viewing pending approval requests
- Reviewing employee requests
- Approving or rejecting requests
- Managing approval workflows
- Tracking approval status
- Reviewing approval history

Step 1: Open the Approvals Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, locate **Approvals**.
3. Click on **Approvals** to open the module.
4. The approvals dashboard displays all approval-related requests.

This section helps managers and administrators review and process employee requests efficiently.

Step 2: View Pending Approval Requests

1. On the dashboard, review all pending approval requests.
2. The request list may display:
 - Employee Name
 - Request Type
 - Request Date
 - Department
 - Current Status
 - Assigned Approver
3. Use filters or search options to locate specific requests.

This helps approvers quickly identify pending actions.

Step 3: Open a Request for Review

1. Click on a specific request from the list.
2. The detailed request page opens.
3. Review request information such as:
 - Employee details
 - Request reason
 - Requested dates or amount
 - Supporting documents
 - Workflow status

This step ensures approvers can verify all request details before taking action.

Step 4: Review Supporting Documents

1. Check uploaded attachments or supporting files.
2. Verify any required documentation.
3. Review screenshots, forms, or approvals attached by the employee.

Supporting documents help ensure approval accuracy and policy compliance.

Step 5: Approve or Reject the Request

1. After reviewing the request, select one of the following actions:
 - Approve
 - Reject
 - Send Back for Correction
2. Add comments or remarks if required.
3. Submit the approval decision.

The employee receives notification updates based on the action taken.

Step 6: Manage Multi-Level Approval Workflow

1. Review the approval hierarchy or workflow path.
2. Track which stage the request is currently in.
3. Requests may move through:
 - Reporting Manager
 - HR Team
 - Finance Team
 - Admin Approval
4. Each level can review and take action independently.

This ensures proper organizational approval control.

Step 7: Track Approval Status

1. Navigate to the request tracking section.
2. Review the current status of requests.

Possible statuses may include:

- Pending
- Approved
- Rejected
- In Review
- Sent Back
- Completed

3. Monitor updates and timestamps for each action.

This helps maintain transparency throughout the approval process.

Step 8: Filter Approval Requests

1. Use available filters to sort requests.
2. Filter by:
 - Request Type
 - Employee Name
 - Department
 - Date Range
 - Status
 - Approver
3. Quickly locate specific requests when required.

Filters improve operational efficiency and request management.

Step 9: Access Approval History

1. Open the approval history section.
2. Review previously processed requests.
3. View:
 - Action history
 - Approval comments
 - Decision timestamps
 - Workflow movement
4. Download records if required.

Approval history helps maintain proper audit and compliance records.

Step 10: Monitor Notifications and Updates

1. Review approval notifications from the dashboard.
2. Receive updates for:
 - New requests
 - Approved requests
 - Rejected requests
 - Pending actions
3. Respond to requests directly from the notification flow if supported.

This helps approvers stay updated on pending tasks.

Key Benefits of the Approvals Module

- Centralized approval management

- Faster request processing
- Multi-level approval workflows
- Real-time status tracking
- Improved transparency and accountability
- Easy audit trail management
- Reduced manual approval delays

End of Tutorial

You have now completed the walkthrough of the TankhaPay Approvals module.

The Approvals module helps organizations efficiently manage employee requests, approval workflows, status tracking, and audit records through a centralized approval system.