

Budget Plan Inbox

Detailed Module Guide: Budget Plan Inbox

Module Location

General Ledger > Budget > Budget Plan Inbox

Module Objective

The **Budget Plan Inbox** module is specifically designed for managers or leaders who have the authorization to review, approve, or reject Budget Plan submissions sent by various departments (Cost Centers). This module is the central hub for all budget approval actions.

1. Main View (Approval Inbox)

The main view of this module is an "inbox" that displays all Budget Plan documents requiring your action.

Budget Plan Request Inbox								
Budget Code		Any Part of Field		NONE				
Search		Show All						
Date From 1 July 2025		Date To 31 July 2025		Search		Document Filter Status Approval Filter Status		
Page : 1 Of 2								
No.	Budget Code	Date	Status	Approval	Approved Date	Requester	R	
<input type="checkbox"/>	1.	BPR2012507-0000189	27-Jul-2025			28-Jul-2025 16:38:14 PM	Khusni Amalia	R
<input type="checkbox"/>	2.	BPR2012507-0000188	26-Jul-2025			28-Jul-2025 16:38:10 PM	Afif Tunggal P	R
<input type="checkbox"/>	3.	BPR2012507-0000187	26-Jul-2025			28-Jul-2025 16:38:04 PM	Ainur Rofiq	R
<input type="checkbox"/>	4.	BPR2012507-0000185	26-Jul-2025			28-Jul-2025 16:37:55 PM	Rina Tetimau	R
<input type="checkbox"/>	5.	BPR2012507-0000184	26-Jul-2025			28-Jul-2025 16:37:36 PM	Ahmad Mikroji	R
<input type="checkbox"/>	6.	BPR2012507-0000183	26-Jul-2025			26-Jul-2025 12:55:19 PM	Budi Haryanto	R
<input type="checkbox"/>	7.	BPR2012507-0000182	25-Jul-2025			28-Jul-2025 16:37:30 PM	Rina Tetimau	R
<input type="checkbox"/>	8.	BPR2012507-0000181	25-Jul-2025			28-Jul-2025 16:37:26 PM	Rina Tetimau	R
<input type="checkbox"/>	9.	BPR2012507-0000180	25-Jul-2025			28-Jul-2025 16:37:21 PM	M. Reza Rachmansyah	R
<input type="checkbox"/>	10.	BPR2012507-0000179	25-Jul-2025			29-Jul-2025 09:23:18 AM	Icuk Purwianto	R
<input type="checkbox"/>	11.	BPR2012507-0000178	25-Jul-2025			28-Jul-2025 16:37:17 PM	Supragono	R
<input type="checkbox"/>	12.	BPR2012507-0000177	25-Jul-2025			28-Jul-2025 16:37:09 PM	Dian Tyagita Haryono	R
<input type="checkbox"/>	13.	BPR2012507-0000176	25-Jul-2025			26-Jul-2025 12:54:48 PM	Nazmil Umri	R
<input type="checkbox"/>	14.	BPR2012507-0000175	25-Jul-2025			26-Jul-2025 12:54:39 PM	Nazmil Umri	R
<input type="checkbox"/>	15.	BPR2012507-0000174	25-Jul-2025			25-Jul-2025 12:59:38 PM	Idham Wardana	R
<input type="checkbox"/>	16.	BPR2012507-0000173	25-Jul-2025			25-Jul-2025 12:59:34 PM	Lupita Krisdayanti Hartanto	R
<input type="checkbox"/>	17.	BPR2012507-0000172	24-Jul-2025			25-Jul-2025 12:59:28 PM	Sugeng Widodo	R
<input type="checkbox"/>	18.	BPR2012507-0000171	24-Jul-2025			26-Jul-2025 13:22:41 PM	Anton Darmawan	R
<input type="checkbox"/>	19.	BPR2012507-0000170	24-Jul-2025			26-Jul-2025 09:47:04 AM	Aulia Kurniawati	R
<input type="checkbox"/>	20.	BPR2012507-0000168	08-Jul-2025			08-Jul-2025 15:01:53 PM	Dovi Afandi	R

View Explanation

This page functions as a dashboard to monitor and manage all incoming budget requests.

- **Date Filter:** You can filter documents based on a submission date range by filling in the **Start Date** and **End Date**, then clicking **Search**.
- **Request List:** The table below displays the details of each budget request awaiting action.

Column Explanations

- **No.:** Serial number.
- **Budget Code:** The unique code from the submitted Budget Plan document.

- **Date:** The date the document was created by the requester.
- **Status:** An icon indicating the current document status. A document icon typically signifies that the document has been submitted and is ready for review.
- **Approval:** An icon showing the approval status. An hourglass icon or yellow/orange color generally indicates "Awaiting Approval," while a checkmark icon or green color indicates "Approved."
- **Approval Date:** A timestamp that records when the approval action (accepted/rejected) was taken. This column will be empty if no action has been taken.
- **Requester:** The name of the employee who created and submitted the Budget Plan, for example, "Khusain Amalia," "Rina Tetimau," "Ahmad Milaroji."

Button Functions

- **Accept:** The main action button to approve or accept one or more selected Budget Plan submissions.

2. Steps for the Budget Approval Process

The following is the standard workflow for an approver in this module.

Step 1: Access and Monitor the Inbox

Open the Budget Plan Inbox module periodically to see if any new submissions have arrived that require your attention.

Step 2: Review Budget Plan Details

To understand the details of a submission, click on one of the rows (for example, the row with the requester "Budi Haryanto"). This action will open the detailed document view, showing the breakdown of expense accounts and proposed amounts (similar to the Budget Plan entry form).

Step 3: Take Action (Approval)

After reviewing the details and ensuring the submission is appropriate:

1. Return to the main Inbox page.
2. Check the box on the left side of one or more submission rows you wish to approve.
3. Click the **Accept** button located in the bottom-left section of the page to process the approval.

Approve

4. Once this action is taken, the approval status will change, and the **Approval Date** will be recorded.

Note: Depending on the system configuration, there may be other buttons such as "Reject" or "Request Revision" within the detailed view of each submission.

3. Workflow & Integrated Business Process

This module is part of a larger, integrated budget approval workflow and is directly connected to the **Budget Plan** module.

1. **Requester:** An employee from a **Cost Center** (e.g., Idham Wardana) creates a submission in the **Budget Plan** module.

2. **Submission:** After the Requester clicks the **Confirm** button, the document is automatically sent and appears in the **Budget Plan Inbox** module of their superior or the party authorized to grant approval.
3. **Approver:** The superior or finance manager opens the **Budget Plan Inbox** module to view the request.
4. **Action:** The Approver reviews the submission and takes action (e.g., clicks **Accept**).
5. **Status Update:** The status on the original document, as seen by the Requester, will be updated in real-time, showing that their budget has been approved.

Revision #7

Created 28 July 2025 15:06:06 by Muhammad Ali Akbar

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