FS Projection Inbox

Detailed Module Guide: Financial Statement Projection Inbox

Module Location

General Ledger > Budget > FS Projection Inbox

Module Objective

The **Financial Statement Projection Inbox** module is the approval center for all submitted Financial Projection documents. This module is designed specifically for managers or leaders who are authorized to review and give final approval to the financial forecasts created by their teams or departments.

1. Main View (Request Inbox)

When you open the module, you will see the main page, which functions as an "inbox" for all financial projection approval requests.



View Explanation This page lists all projection documents awaiting your action.

- **Filters:** You can filter the displayed documents based on:
  - **FPCode** (Financial Projection Code).

- A **Start Date** and **End Date** range.
- **Document Status** and **Approval Status** using the icon filters.

- **Request List:** The table below will display all documents matching the filters. The table currently shows "...No Data Available...".
- **Main Columns:** The columns that will be displayed include **FPCode**, **Date**, **Status**, and **Approval**.

Button Functions

- **Approve:** The main action button to approve or accept one or more Financial Projection submissions that have been selected from the list.

2. Approval Process Steps

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

Step 1: Access and Monitor the Inbox Open this module periodically to check if any new projection submissions have arrived that require your approval.

Step 2: Review Projection Details To understand the details of a submission, click on that document's row in the table. This action will take you to the detail view, where you can see the breakdown of accounts, the previous year's actual values, and the proposed projection values.

Step 3: Take Approval Action After reviewing the details and ensuring the submission is appropriate:

1. Return to the main Inbox page.
2. Check the box on the left of the submission row you wish to approve. 
3. Click the **Approve** button located in the bottom-left section of the page to process the approval. 

After this action, the approval status on the document will be updated.

3. Workflow & Integrated Business Process

This module is a critical part of the financial projection workflow.

1. **Submission:** A user creates a projection document in the **Financial Projection** module and clicks **Confirm**.
2. **Notification:** The confirmed document automatically appears in the **FS Projection Inbox** of their superior or the authorized party.
3. **Review & Approval:** The approver opens this module, reviews the details, and grants approval by clicking **Approve**.
4. **Finalization:** Once approved, the projection data becomes official and can be used as the basis for generating reports in the **P&L Statement Projection** module.

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