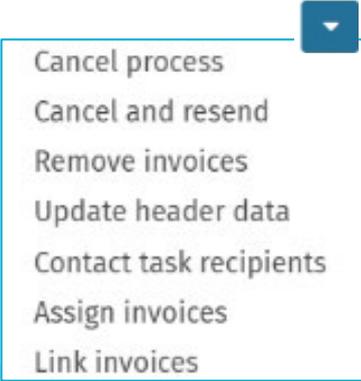# BATCH ACTIONS

With batch actions you can manage a large set of invoices at once. By selecting multiple invoices, the resolution of an issue can be resolved in one single action.

Note: When selecting invoices, only actions in that queue are visible. Actions will be grayed out if they are not available for that specific queue.

Cancel process
Cancel and resend
Remove invoices
Update header data
Contact task recipients
Assign invoices
Link invoices

Contact Task Recipients
Contact the task recipients of multiple invoices by email to rush processing. The recipient must be assigned to the invoice to use this action. This action can be done only in the **Workflow queue**.

- Select invoices in **Workflow queue > Pending tasks**.
- Click **More options** > Select **Contact task recipients**.
- Add message to recipients.
- Click **Send**.

Cancel Process
This action allows to cancel the invoice workflow and return it to the received queue for reprocessing. This will delete all automatically added coding rows from the invoice for PO or spend plans. This action can be done only in **Matching, Workflow, and Transfer queues**.

- Select invoices.
- Click **More options** > Select **Cancel process**.
- Add **Comment**.
- Click **Cancel**.

Cancel and Resend
This action returns invoices back to the beginning of the workflow process and restarts the process all over again. Non-PO invoices will return to the Workflow queue. PO & spend plan invoices will return to the Matching queue. This action can be done only in **Matching, Workflow, and Transfer queues.**

- Select invoices.
- Click **More options** > Select **Cancel and resend**.

Remove Invoices
This action removes the invoices from the workflow process. The invoices will not be visible in AP Pro. This action can be done in **all queues.**

- Select invoices.
- Click **More options** > Select **Remove invoices**.
- Add **Comment**.
- Click **Remove**.

Update Header Data

With this action, you can update multiple invoice data fields. This action can be done in **all queues.**

Note: For batch actions to be done, invoices are required to belong to the same organization, within your company, but they do not need to be for the same supplier.

- Select invoices.
- Click **More options** > Select **Update header data**.
- Select fields to update > Click **Continue**.
- Update the header data for the selected fields > Click **Update**.
- Click **Send to validation**.

Assign Invoices

With this action, you can change the AP clerk or unassign multiple invoices at once. The AP clerk list will only show the clerks that have invoice rights to the selected invoices. This batch action can be done for up to 2,000 invoices at a time. This action can be done in **all queues.**

- Select invoices.
- Click **More options** > Select **Assign invoices**.
- Select AP clerk.
- Click **Assign**.

Invoice Linking

With this action, you can link two business documents together. The link can be created between two invoice documents, for example, an invoice and a credit memo. You can create the link on the **Related documents** tab by searching a document to be linked to the open invoice and selecting it. This action can be done only in **Matching and Workflow queues**.

- Select invoices.
- Click **More options** > Select **Link invoices**.

Transfer

When the invoice has been approved, it is routed to the transfer phase for AP/finance users to process. The invoice and its coding data are transferred to an ERP system for payment. This action can be done only in the **Transfer queue.**

Note: Ready for transfer only applies to clients that are not set up with automatic transfer to ERP.

- Select invoices in **Transfer queue > Invoices to transfer**.
- Click **Transfer**.

Prebook

This enables invoices to be coded and transferred to the ERP system before they are approved. The prebooking will be automatically reversed when the invoice is removed from the process (the best practice would be to run an accrual report to allocate data within ERP and then to prebook an invoice).

Enable Manual Matching

In the Basware system, there is a PO invoice that has been automatically matched, but the invoice cannot be processed because goods are not received on the PO. By enabling the manual matching, the invoice will be moved into the workflow of manual order matching to process invoice or reminding buyers to receive goods.

- Select invoices in **Matching queue > Waiting for Goods Receipt**.
- Click **More options** > Select **Enable manual matching**.

Batch Action History

Historical batch actions are available on the **Activity center** tab in AP Pro. You can drill down to a specific invoice or to a batch of invoices to view all the invoice details. You can view batch actions by Today, Last 7 days, or Last 30 days. You can view older batches through the advanced search options.

Invoices	Payment plans	**Activity center**	Accrual reports		
		Activities	Accounts payable		
		Today	Last 7 days	Last 30 days	
		Activity	Items	Status	End date
		Cancel invoice process	4 invoices	4 successful	3/31/2021