

## INVOICE WORKFLOW AND CODING PARAMETERS

The invoice workflow can be automated with predefined processes. The reviewer and approver receive an email notification with a link to the Basware system (all users use the same web client, but they have access to different functions depending on their user role).

Parameter	Description
<b>Require Complete Coding</b>	<p>The invoice must be fully coded for approval before transfer can be completed. The aggregated total of the coding rows must be equal to the invoice header total.</p> <p>By default, the invoice header gross total and coding row <b>gross total</b> fields are compared in the difference check.</p>
<b>Allowed Coding Tolerance</b>	<p>This parameter is related to the <i>Require Complete Coding</i> parameter.</p> <p>No difference is allowed when comparing the aggregated total of coding rows to the invoice header total. If the parameter value is 0.01, it means that a difference of 0.01 is allowed and the invoice is still considered to be fully coded.</p>
<b>Action Required by Only One of the Selected Users</b>	<p>You can see this option when the <b>User selection</b> dialog box is shown. When this option is selected, only one of the selected recipients must perform the task. The recipients who do not perform the task can be selected to perform other tasks later in the workflow.</p> <p>When the first recipient has done the task, the other tasks are canceled, and the invoice moves forward in the process.</p> <p>The user whose tasks were canceled can still find the invoice on the <b>Search</b> page with a separate filter.</p>
<b>Allow Forwarding of Tasks</b>	<p>There is an additional <b>Forward</b> option in the <b>More actions</b> menu.</p> <p>The original user can forward their review or approval task to another user instead of performing the action.</p>
<b>Allow Approving and Forwarding of Tasks</b>	<p>There is an additional <b>Approve and Forward</b> option in the <b>More actions</b> menu.</p> <p>The original user can approve their own task and at the same time create a new approval task for another user. In practice, this means splitting the approval task between several users.</p> <p>The invoice will not move to the next activity in the process until all approvals have been completed.</p>
<b>Approval Limit Check Calculation</b>	<p>The approval limit, which is configured in the user role settings in Basware P2P Administration, is checked against the invoice <b>gross total</b> field.</p> <p>If the net total option is selected, then the approval limit is checked against the <b>invoice net total</b> field.</p>
<b>Sum Used in the Approval Limit Check</b>	<p>The approval limit, which is configured in the user role settings in Basware P2P Administration, is checked against the <b>company sum</b> field of the invoice.</p> <p>If the organization option is selected, then the approval limit is checked against the <b>organization (=corporate) sum</b> field on the invoice.</p>
<b>Conditional Approval Enabled</b>	<p>By default, the invoice stays in the current approval activity in all approval situations until a user with enough limit approves the invoice.</p> <p>All previous approvals are considered conditional approvals and they are shown as such in the invoice history.</p>
<b>Approval Password Required</b>	<p>No additional user-defined password is asked when a user approves the invoice.</p>