

ACTIONS FOR INVOICES AND CODING ROWS

This table explains some general actions and the basic actions for invoices and coding rows. The suggested main action depends on the status of the invoice. AP Pro suggests the most probable action to be taken next on the invoice.

Action	Description
Lock invoice	<p>The invoice is locked automatically to you when you have changed the invoice data, and it stays locked until you save the changes. The invoice is <i>not</i> locked to you when you only click a field or open a drop-down list. This way, you can copy data from fields without locking the invoice from other users.</p> <p>When an invoice is locked to another user, you will see a message about it above the invoice details.</p>
Assign invoice	<p>You can assign invoices to users with the user picker that is available on the invoice's title bar. If you also have the tenant setting "Prevent editing invoices that are assigned to other users" set to "True", only the AP clerk that the invoice is assigned to can process the invoice. This way, you can protect invoices so that they cannot be processed by other users. Anyone can process invoices that are unassigned.</p> <p>To enable this feature, the tenant settings "PreventActionOnSSCInvoicesAssignedToOthers" and "SSCWorkloadManagementEnabled" must be set to "True". To implement this change for your system, request a service in the Basware Customer Support Portal.</p>
Contact task recipients	Sends an email message to task recipients of the invoice.
Forward	Forward to another user. As an AP clerk, you might need to forward an invoice header level task with a wrong or missing recipient. When forwarding in batches, you can update task recipients at the same time.
Update task recipient	Combined with the forward action.
Transfer	The invoice and its coding data are transferred to an ERP system for payment.
Return to workflow	Sometimes, invoices are accidentally approved or a wrong person has approved the invoice (for example a user approves their own costs) and the AP clerk must return the invoice to the activity where the mistake was made.
Send to validation	An invalid or draft invoice can be manually sent to validation. Automatic validation is part of the receiving phase of the invoice process.
Select process	The invoice has an incorrect process. The current process is canceled, and the invoice is sent to a new process.
Cancel and resend	The process is canceled, and the invoice is resent to the beginning of the same process. Example: The invoice does not have the order number or the plan reference. The user adds them and wants to resend the invoice to the process to match it correctly.
Cancel process	The process is canceled, and the invoice moved to Received > Returned sub-status.
Remove	The invoice is removed because it is not valid to be processed.
Prebook	Prebooking enables invoices to be coded and transferred to the ERP system, but the invoice is not yet paid.
Mark as confidential + Remove confidentiality	An invoice can be marked as confidential for example if the invoice contains legal fees or it is pension related. Only the users with tasks on the invoice or with rights to see confidential invoices can see <i>all</i> the invoice data. Other users cannot see the invoice image and attachments.

Action	Description
Dispute	A reason to raise a dispute is, for example, a price difference on an invoice. Disputed invoices are placed on hold. No workflow tasks (review or approve) can be performed on the invoice until the dispute has been resolved. The whole invoice is disputed, not one or many invoice lines. When the dispute is resolved, the invoice is released, and the workflow can continue.
Skip activities	Invoices, which are pending in the invoice process and require urgent payment (for example, to use early payment discounts), can be taken out of the standard process and moved forward in the process to complete the required activities process faster. The skipping of activities requires an additional user right.
Create spend plan	See separate quick guides for spend plans.
Coding rows	
Fix coding difference	AP Pro checks if the difference is in the tolerance and if there is an automatic coding template to define how to handle the difference. The action is available if a coding difference template is set.
Calculate taxes	Sends coding rows to anyERP for tax calculations.
Import coding from template/Excel	AP user can import coding data manually from .xlsx format or from a template.
Import automatic coding	When automatic coding fails, the AP user can first update the data and then start automatic coding again.
Save coding as template	Coding is saved as a template for later use. You can save the template as personal or shared.
Export to Excel	All data from invoice list and coding rows are exported in .xlsx format.