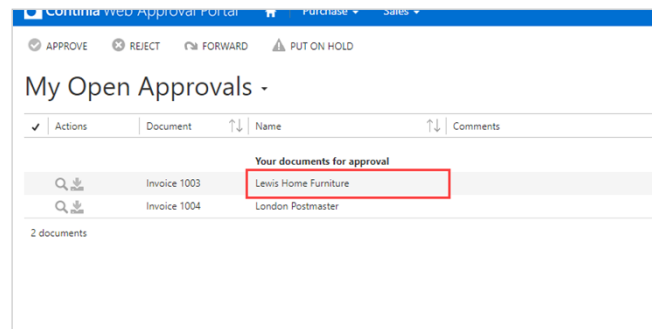
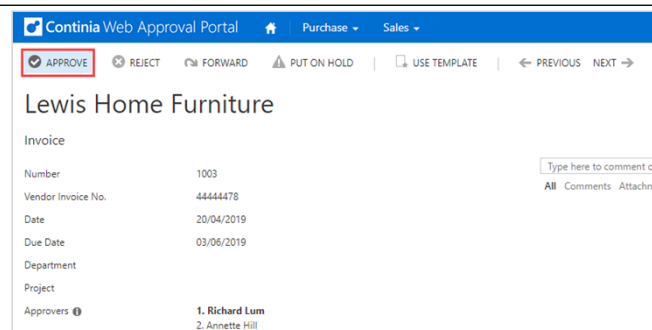


When you handle documents in the Continia Web Approval Portal you have several actions available. Let's have a look at the possibilities. To open the document page, select the invoice from **"Lewis Home Furniture"**.

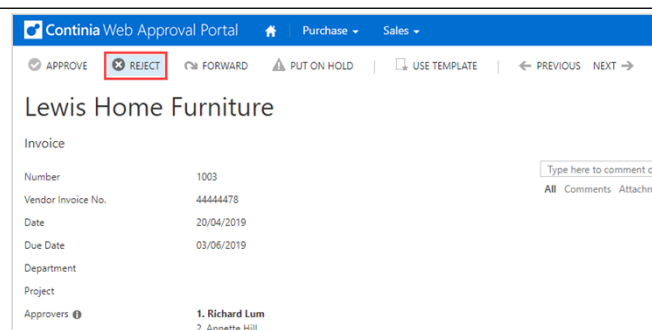


At the top of the page a selection of actions is available when handling documents in the Continia Approval Portal: Approve, Reject, Forward and Put on Hold.



To approve a document, use the **"APPROVE"** action in the top left corner of the page. When the document is approved it will either be sent to the next approver in line or returned to the Account Payables, if you are the last one to approve the document. The next document awaiting your approval is automatically shown in the approval portal.

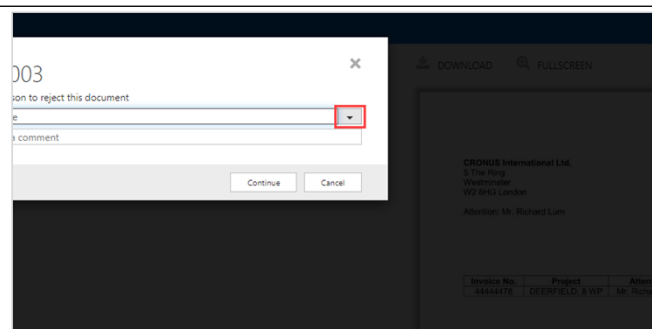
To reject a document, use the **"REJECT"** action which is placed as the next action at the top of the page. When rejecting, the document will either be returned to the previous approver or sent back to the Account Payables department. How far back in the flow the document is rejected is up to the approver to choose. Please select the **"REJECT"** action now.



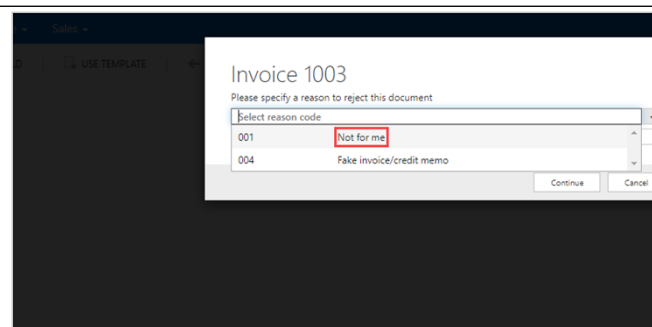
When rejecting a document, you get asked to fill in the reason why the document is rejected.

Depending on the configuration of the approval settings in Document Capture, it might be necessary to choose a reason code from a predefined list of rejection codes.

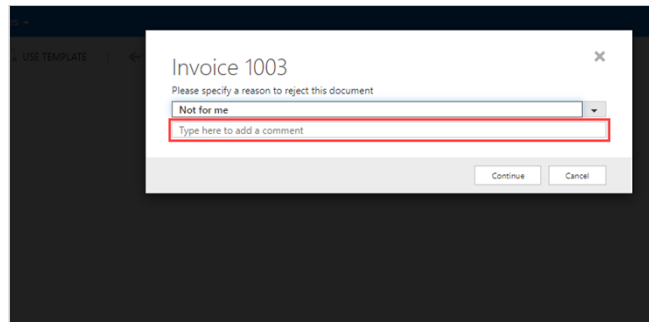
Open the rejection code list by selecting the **"dropdown"** button to the right.



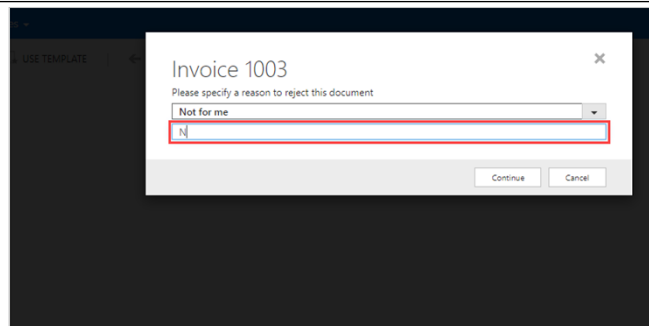
Select a reason code. In this situation the **"Not for me"** is suitable.



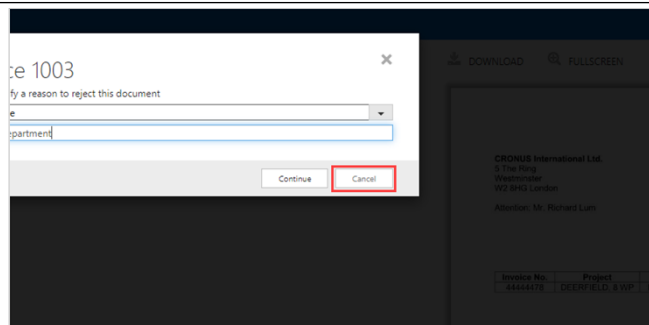
To add a comment, place the cursor in the **"comment"** field.



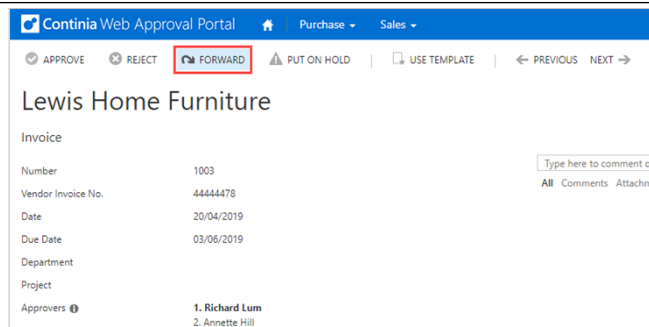
Type in a comment.  
Reject the document by selecting the **"Continue"** action.



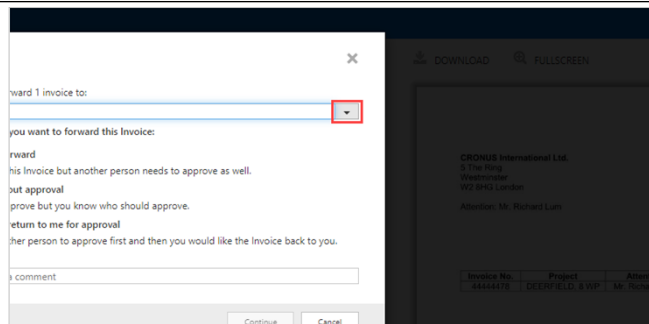
If you like to reconsider, select the **"Cancel"** action.  
This closes the rejection form and returns you to the document page.



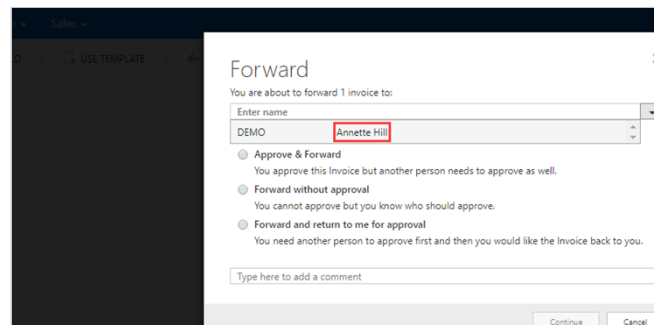
In some situations, another person is to approve the document. To forward the document to a colleague select the **"FORWARD"** action at the top of the page.



To forward a document, you must choose who is to approve the document.  
Open the list of possible approvers by selecting the **"drop-down"** button to the right.



Choose "**Annette Hill**" to add her to the approval flow of the current document.



**Forward**

You are about to forward 1 invoice to:

Enter name  
DEMO Annette Hill

☒ Approve & Forward  
You approve this Invoice but another person needs to approve as well.

☐ Forward without approval  
You cannot approve but you know who should approve.

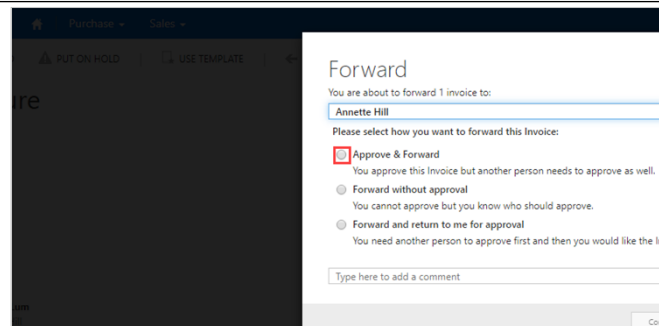
☐ Forward and return to me for approval  
You need another person to approve first and then you would like the Invoice back to you.

Type here to add a comment

Continue Cancel

Depending on the configuration of the approval settings in Document Capture, one or more forward options are made available. Let's go through the different options.

**"Approve & Forward"** will have you approve the document and then automatically forward the document to the chosen colleague.



**Forward**

You are about to forward 1 invoice to:

Annette Hill

Please select how you want to forward this Invoice:

☒ Approve & Forward  
You approve this Invoice but another person needs to approve as well.

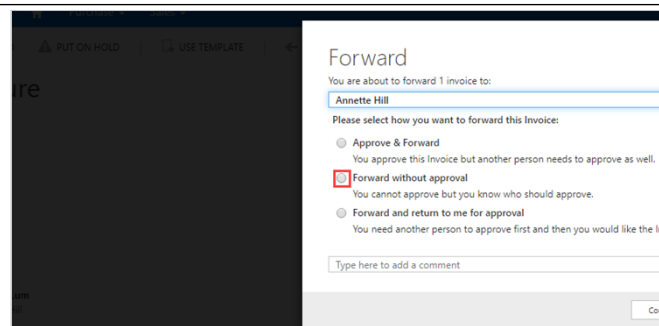
☐ Forward without approval  
You cannot approve but you know who should approve.

☐ Forward and return to me for approval  
You need another person to approve first and then you would like the Invoice back to you.

Type here to add a comment

Continue Cancel

**"Forward without approval"** forwards the document to the chosen colleague without you approving the document.



**Forward**

You are about to forward 1 invoice to:

Annette Hill

Please select how you want to forward this Invoice:

☐ Approve & Forward  
You approve this Invoice but another person needs to approve as well.

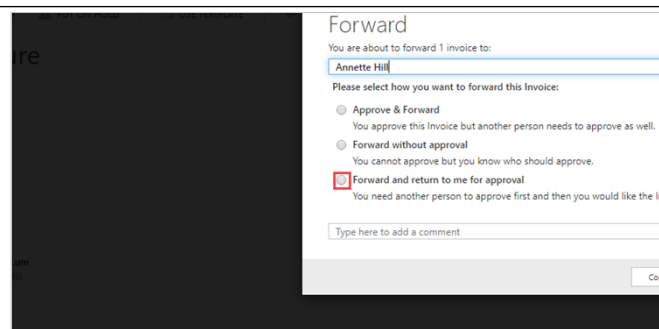
☒ Forward without approval  
You cannot approve but you know who should approve.

☐ Forward and return to me for approval  
You need another person to approve first and then you would like the Invoice back to you.

Type here to add a comment

Continue Cancel

The last option **"Forward and return to me for approval"** will forward the document to the chosen colleague and afterward be returned for your approval.



**Forward**

You are about to forward 1 invoice to:

Annette Hill

Please select how you want to forward this Invoice:

☐ Approve & Forward  
You approve this Invoice but another person needs to approve as well.

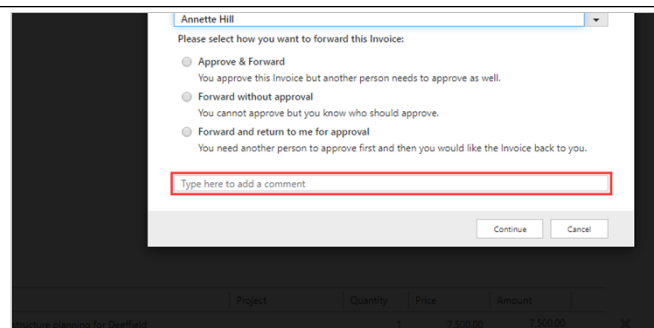
☐ Forward without approval  
You cannot approve but you know who should approve.

☒ Forward and return to me for approval  
You need another person to approve first and then you would like the Invoice back to you.

Type here to add a comment

Continue Cancel

It is recommended to fill in a comment to inform your colleague why you forwarded the document. Place the cursor in the **"comment"** field and type in a suitable text.



**Forward**

You are about to forward 1 invoice to:

Annette Hill

Please select how you want to forward this Invoice:

☐ Approve & Forward  
You approve this Invoice but another person needs to approve as well.

☐ Forward without approval  
You cannot approve but you know who should approve.

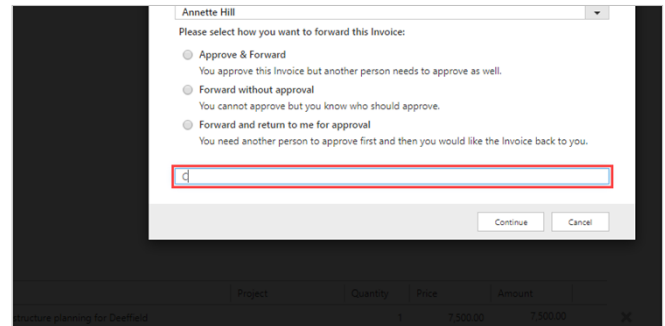
☐ Forward and return to me for approval  
You need another person to approve first and then you would like the Invoice back to you.

Type here to add a comment

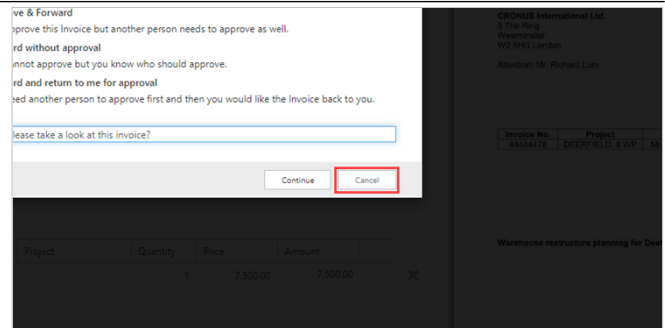
Continue Cancel

Project	Quantity	Price	Amount
Partners planning for Denmark	1	7.500,00	7.500,00

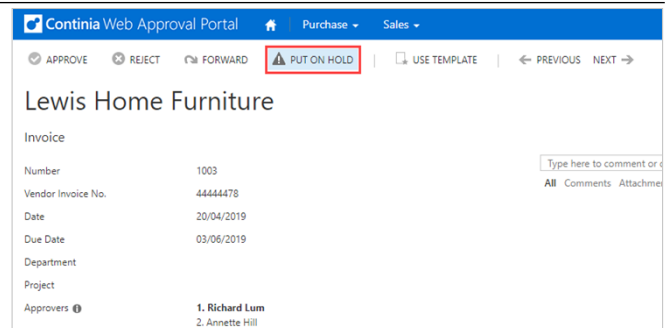
Type in a text and forward the document by selecting the "Continue" action.



If you want to reconsider select the "Cancel" action. This closes the forward form and returns you to the document page.



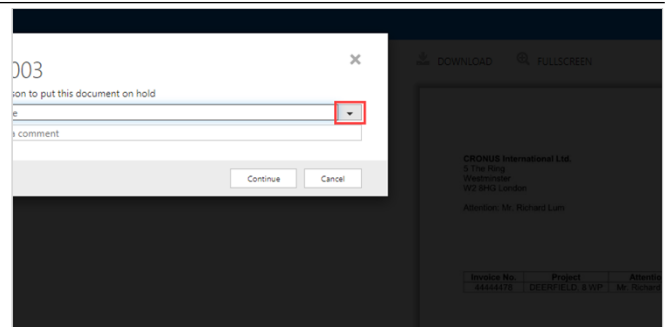
The fourth action at the top of the document page is "PUT ON HOLD". This action informs the Account Payables department that the document cannot be approved right now. This is often used in situations where the approver disagrees with the vendor about prices or missing deliveries. Select the action "PUT ON HOLD".



When putting a document on hold you are always asked to fill in the reason why the document is held back.

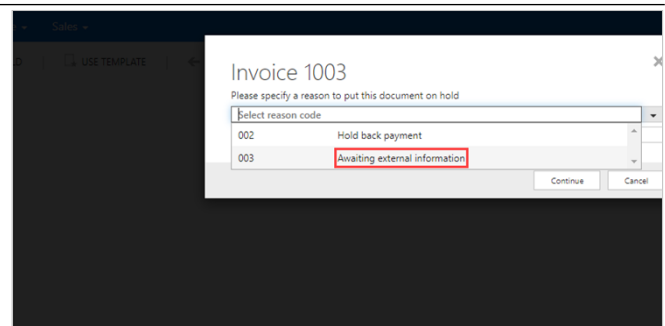
Depending on the configuration of the approval settings in Document Capture, it might be necessary to choose a reason code from a predefined list of put on hold codes.

Open the put on hold code list by selecting the "dropdown" button to the right.

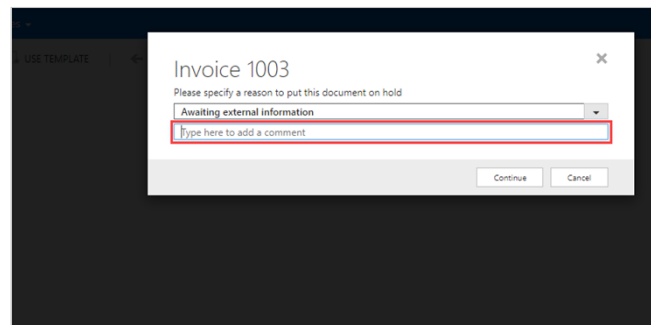


Select a reason code.

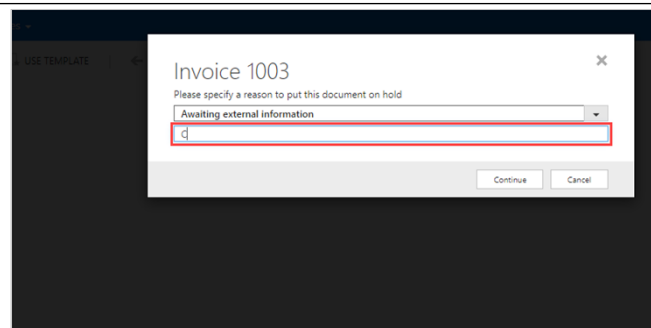
In this situation the "Awaiting external information" is suitable.



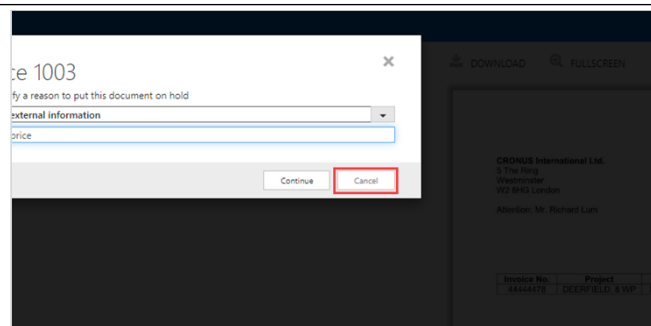
To add a comment, place the cursor in the "comment" field.



Type in a comment.  
Put the document on hold by selecting the "Continue" action.



If you like to reconsider select the "Cancel" action.  
This closes the put on hold form and returns you to the document page.



In the Continia Web Approval Portal, the document lines are editable. The possibilities for updating the document lines are depending on the setup of the individual approvers' permissions. Let's have a look at the actions at the line section of the page.  
In this invoice, there is one invoice line. Everything is filled in according to the company requirements, except for the project code.  
To choose a project code, select the "drop-down" button in the project code field.

Project	Quantity	Price	Amount	
restructure planning for Deefield	1	7,500.00	7,500.00	
			Imported	Assigned
Amount Excl. VAT (GBP)			7,500.00	7,500.00
VAT Amount (GBP)			1,875.00	1,875.00
Amount Incl. VAT (GBP)			9,375.00	9,375.00

Choose the desired project code. For this invoice line, the "VW Transporter" will do.

Project	Quantity	Price	Amount	
restructure planning for Deefield	1	7,500.00	7,500.00	
			Imported	Assigned
Amount Excl. VAT (GBP)			7,500.00	7,500.00
VAT Amount (GBP)			1,875.00	1,875.00
Amount Incl. VAT (GBP)			9,375.00	9,375.00

Besides adding new values to the lines, you are, as an approver, also able to change the existing values presented to you. The field "No.", which in this case is a GL account, is easily altered.

To adjust the account, select the **"drop-down"** button in the number field.

Department				
Project				
Approvers ⓘ 1. Richard Lum 2. Annette Hill				
Invoice Lines				
Type	No.	Account Name	Description	Project
G/L Account	8210	Office Supplies	Warehouse restructure planning for Deefield	VW
TOTAL AMOUNTS				

And choose the account.

In this scenario, the account for **"Repairs and Maintenance"** is the best choice.

Invoice Lines				
Type	No.	Account Name	Description	Project
G/L Account	8210	Office Supplies	Warehouse restructure planning for Deefield	VW
<div> <div>TOTAL AMOUNTS</div> <div> <div>8100 Building Maintenance Expenses</div> <div>8110 Cleaning</div> <div>8120 Electricity and Heating</div> <div>8130 Repairs and Maintenance</div> <div>8190 Total Bldg. Maint. Expenses</div> <div>8200 Administrative Expenses</div> <div>8210 Office Supplies</div> </div> </div>				

Press **"Enter"** when finished modifying the account number.

Invoice Lines				
Type	No.	Account Name	Description	Project
G/L Account	8130	Office Supplies	Warehouse restructure planning for Deefield	VW
TOTAL AMOUNTS				