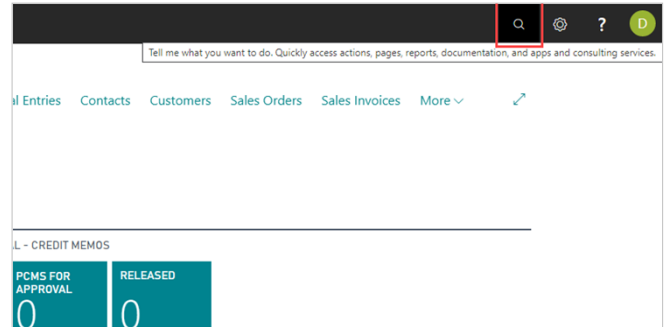
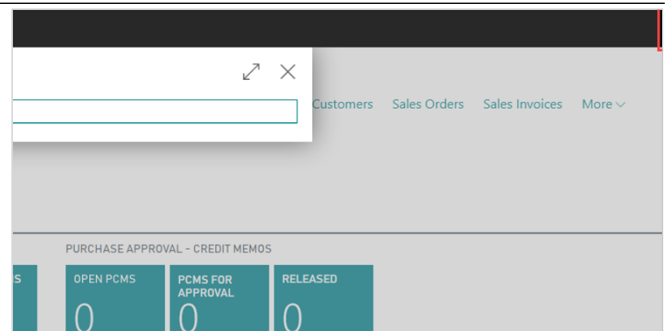


To start sending a document for approval, a few settings in the Document Capture Setup page must be in place.

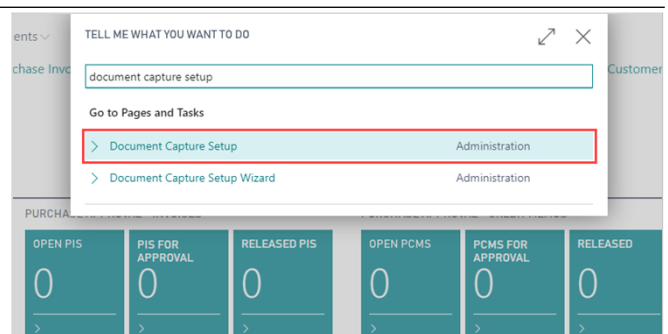
Select the "**magnifier**" to find the Document Capture Setup page.



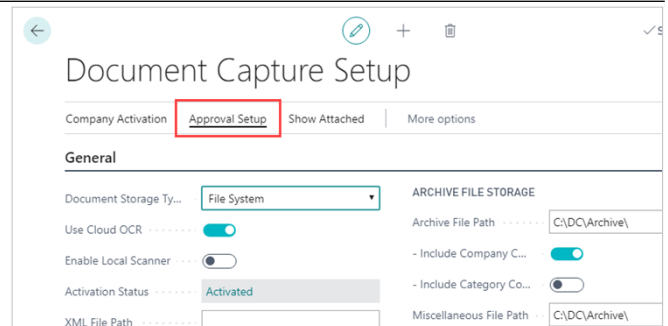
Enter the text "**document capture setup**" to start searching.



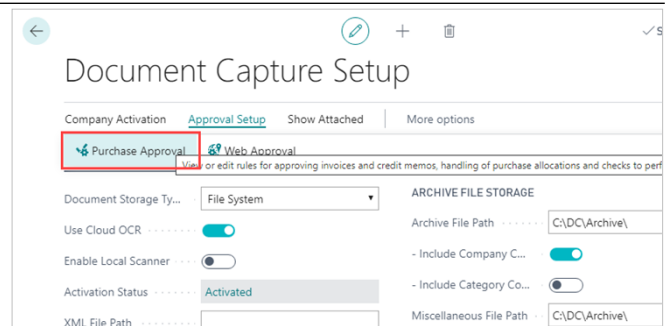
Select "**Document Capture Setup**".



Select "**Approval Setup**" in the ribbon.



Select the action "**Purchase Approval**".



The field "**Approval E-Mail Subject**" is preconfigured with a standard subject, for the notification emails sent to the approvers. Change the subject text if needed.

GENERAL		CHECKS AND VALIDATION	
Enable Invoice Approval	<input type="checkbox"/>	Check Amounts on Appro...	Last Approval
Enable Credit Memo App...	<input type="checkbox"/>	Check Dimensions on Su...	<input type="checkbox"/>
Allow Force Approval	<input type="checkbox"/>	Check Dimensions on Ap...	Last Approval
Use Account and Dimensi...	<input type="checkbox"/>	Amount Validation on Post	Amount Excl. VAT
E-MAIL SETUP		PURCHASE ALLOCATION	
Approval E-Mail Subject	Your Invoices for Approval	Enable	<input type="checkbox"/>
Sender Name		Purchase Allocation Nos.	DC-PA
Sender E-Mail		Amounts	Use Lines or Impo
Error E-Mail		G/L Account Type	Use Posting Setup

The "**Sender Name**" is the name displayed in the notification mail.

GENERAL		CHECKS AND VALIDATION	
Enable Invoice Approval	<input type="checkbox"/>	Check Amounts on Appro...	Last Approval
Enable Credit Memo App...	<input type="checkbox"/>	Check Dimensions on Su...	<input type="checkbox"/>
Allow Force Approval	<input type="checkbox"/>	Check Dimensions on Ap...	Last Approval
Use Account and Dimensi...	<input type="checkbox"/>	Amount Validation on Post	Amount Excl. VAT
E-MAIL SETUP		PURCHASE ALLOCATION	
Approval E-Mail Subject	Your Invoices for Approval	Enable	<input type="checkbox"/>
Sender Name		Purchase Allocation Nos.	DC-PA
Sender E-Mail		Amounts	Use Lines or Impo
Error E-Mail		G/L Account Type	Use Posting Setup

A suitable sender name could be "**Accounting**".

GENERAL		CHECKS AND VALIDATION	
Enable Invoice Approval	<input type="checkbox"/>	Check Amounts on Appro...	Last Approval
Enable Credit Memo App...	<input type="checkbox"/>	Check Dimensions on Su...	<input type="checkbox"/>
Allow Force Approval	<input type="checkbox"/>	Check Dimensions on Ap...	Last Approval
Use Account and Dimensi...	<input type="checkbox"/>	Amount Validation on Post	Amount Excl. VAT
E-MAIL SETUP		PURCHASE ALLOCATION	
Approval E-Mail Subject	Your Invoices for Approval	Enable	<input type="checkbox"/>
Sender Name	A	Purchase Allocation Nos.	DC-PA
Sender E-Mail		Amounts	Use Lines or Impo
Error E-Mail		G/L Account Type	Use Posting Setup

The "**Sender E-Mail**" is the one presented as the sender of the notification in the notification email.

GENERAL		CHECKS AND VALIDATION	
Enable Invoice Approval	<input type="checkbox"/>	Check Amounts on Appro...	Last Approval
Enable Credit Memo App...	<input type="checkbox"/>	Check Dimensions on Su...	<input type="checkbox"/>
Allow Force Approval	<input type="checkbox"/>	Check Dimensions on Ap...	Last Approval
Use Account and Dimensi...	<input type="checkbox"/>	Amount Validation on Post	Amount Excl. VAT
E-MAIL SETUP		PURCHASE ALLOCATION	
Approval E-Mail Subject	Your Invoices for Approval	Enable	<input type="checkbox"/>
Sender Name	Accounting	Purchase Allocation Nos.	DC-PA
Sender E-Mail		Amounts	Use Lines or Impo
Error E-Mail		G/L Account Type	Use Posting Setup

Fill in an appropriate email address. In this session "**accounting@company.com**" will do.

GENERAL		CHECKS AND VALIDATION	
Enable Invoice Approval	<input type="checkbox"/>	Check Amounts on Appro...	Last Approval
Enable Credit Memo App...	<input type="checkbox"/>	Check Dimensions on Su...	<input type="checkbox"/>
Allow Force Approval	<input type="checkbox"/>	Check Dimensions on Ap...	Last Approval
Use Account and Dimensi...	<input type="checkbox"/>	Amount Validation on Post	Amount Excl. VAT
E-MAIL SETUP		PURCHASE ALLOCATION	
Approval E-Mail Subject	Your Invoices for Approval	Enable	<input type="checkbox"/>
Sender Name	Accounting	Purchase Allocation Nos.	DC-PA
Sender E-Mail		Amounts	Use Lines or Impo
Error E-Mail		G/L Account Type	Use Posting Setup

The "Error E-Mail" is the one to receive an e-mail if errors occur, when sending status e-mails to approvers.

GENERAL

Enable Invoice Approval

Enable Credit Memo App...

Allow Force Approval

Use Account and Dimensi...

E-MAIL SETUP

Approval E-Mail Subject

Sender Name

Sender E-Mail

Error E-Mail

CHECKS AND VALIDATION

Check Amounts on Appro...

Check Dimensions on Su...

Check Dimensions on Ap...

Amount Validation on Post...

PURCHASE ALLOCATION

Enable

Purchase Allocation Nos...

Amounts

G/L Account Type

Fill in an appropriate email address. In this session "error-accounting@company.com" will do.

GENERAL

Enable Invoice Approval

Enable Credit Memo App...

Allow Force Approval

Use Account and Dimensi...

E-MAIL SETUP

Approval E-Mail Subject

Sender Name

Sender E-Mail

Error E-Mail

CHECKS AND VALIDATION

Check Amounts on Appro...

Check Dimensions on Su...

Check Dimensions on Ap...

Amount Validation on Post...

PURCHASE ALLOCATION

Enable

Purchase Allocation Nos...

Amounts

G/L Account Type

When finished, select "Close" to close the page.

accounting@company.com

error-accounting@company.com

Not Required

Manual selection

Amounts

G/L Account Type

Source Code

Post Automatically

Posting Date on Reversal

ings >

Close

Close

Select "Back" to return to the role center.

Document Capture Setup

Company Activation | Approval Setup | Show Attached | More options

General

Document Storage Ty...

Use Cloud OCR

Enable Local Scanner

Activation Status

XML File Path

ARCHIVE FILE STORAGE

Archive File Path

- Include Company C...

- Include Category Co...

Miscellaneous File Path

Back