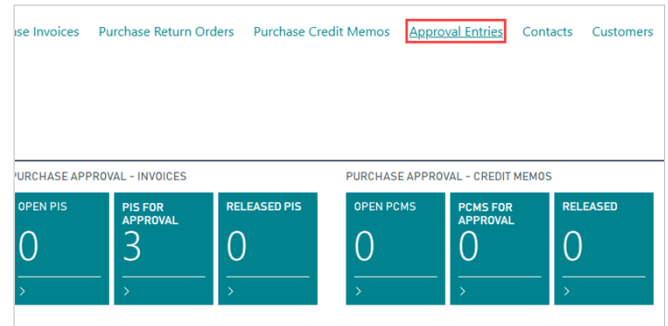
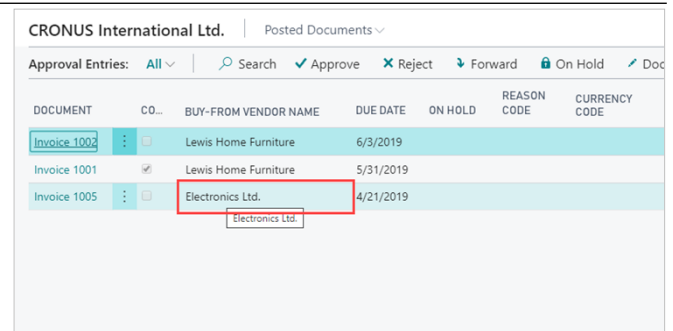


When handling documents in Business Central, you have several actions available. Let's have a look at the possibilities.

Select the action "**Approval Entries**" in the role center.



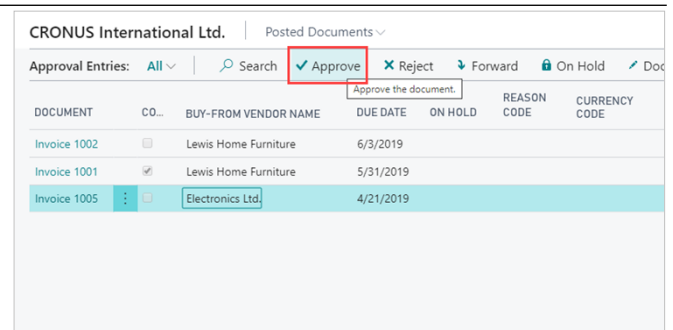
The Approval Entries page contains a list of all the documents awaiting your approval. Start by selecting the document you want to process. Today we will focus on the invoice from "**Electronics Ltd.**".



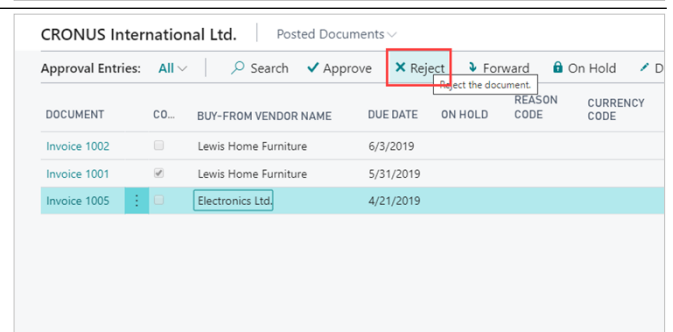
At the top of the page, a selection of actions is available when handling documents in the Continia Approval Portal: Approve, Reject, Forward, and On Hold.

To approve a document, use the "**Approve**" action at the top 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 department if you are the last one to approve the document.



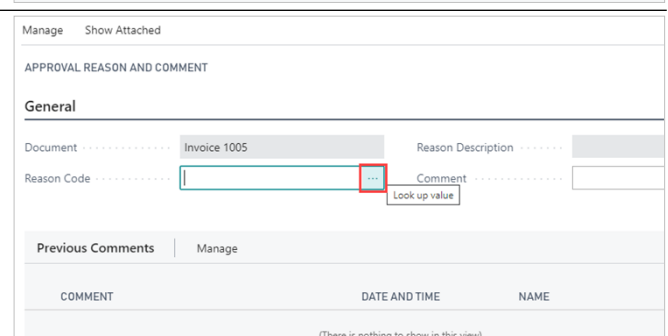
To reject a document, use the "**Reject**" action, which is placed as the next action at the top of the page. When rejecting, the document will either be returned to the previous approver or sent back to the Account Payables department. How far back in the flow the document is rejected, is up to the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



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

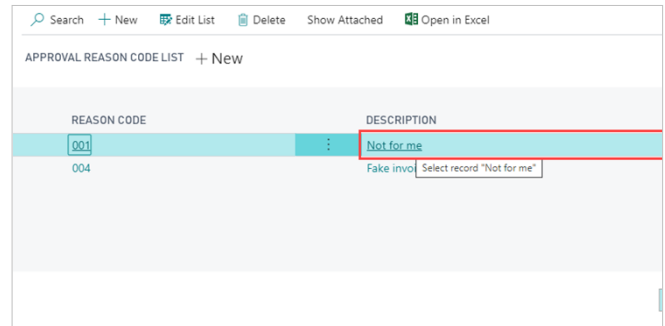
Depending on the configuration of the approval settings in Document Capture, it might be necessary to choose a **Reason Code** from a predefined list of rejection codes.

Open the rejection code list by selecting the "**Look up value**" button to the right.



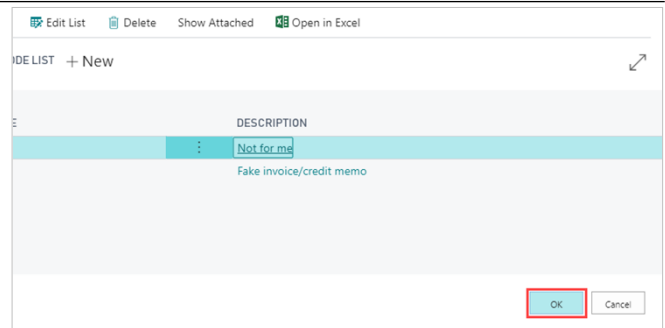
Select a reason code.

In this situation, **"Not for me"** is suitable.



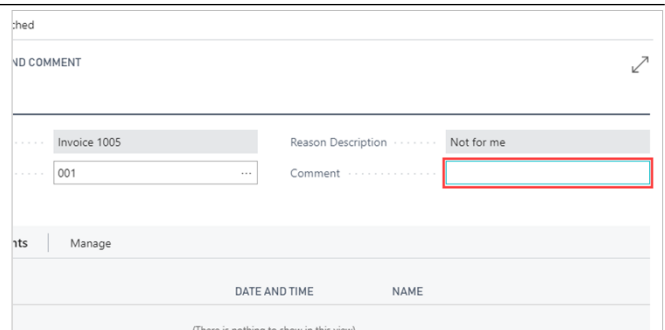
REASON CODE	DESCRIPTION
001	Not for me
004	Fake invoice

Select **"OK"** to return to the Approval Reason and Comment page.



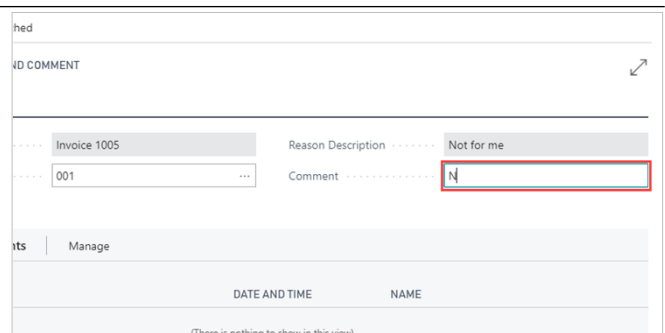
REASON CODE	DESCRIPTION
001	Not for me
004	Fake invoice/credit memo

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



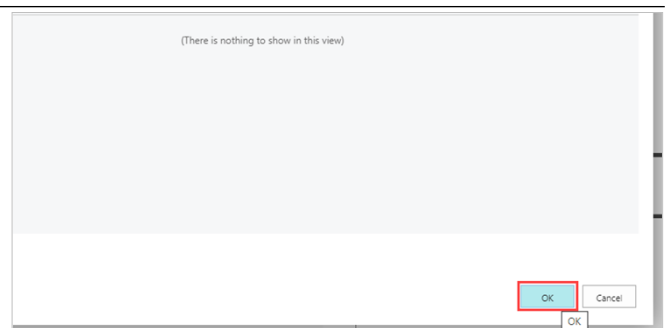
REASON CODE	DESCRIPTION	Comment
001	Not for me	
004	Fake invoice/credit memo	

Type in a comment.



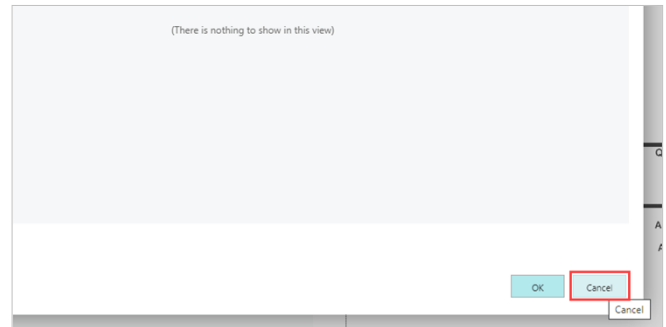
REASON CODE	DESCRIPTION	Comment
001	Not for me	N
004	Fake invoice/credit memo	

Reject the document by selecting **"OK"**.

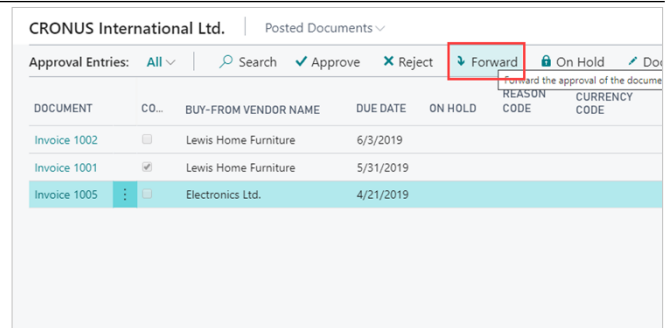


REASON CODE	DESCRIPTION	Comment
001	Not for me	N
004	Fake invoice/credit memo	

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

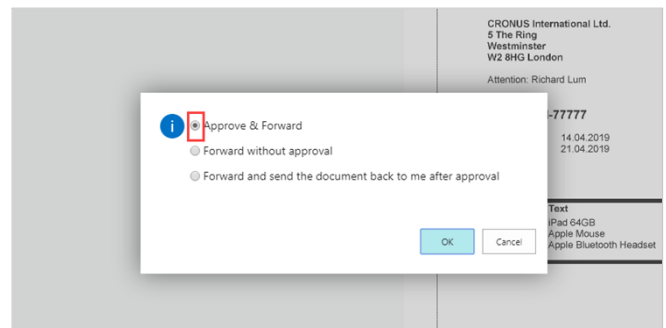


In some situations, another person is to approve the document. To forward the document to a colleague, select the **"Forward"** action at the top of the page.

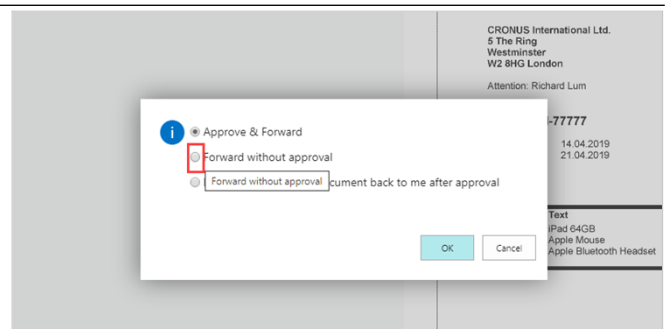


Depending on the configuration of the approval settings in Document Capture, one or more forward options are made available. Let's go through the different options.

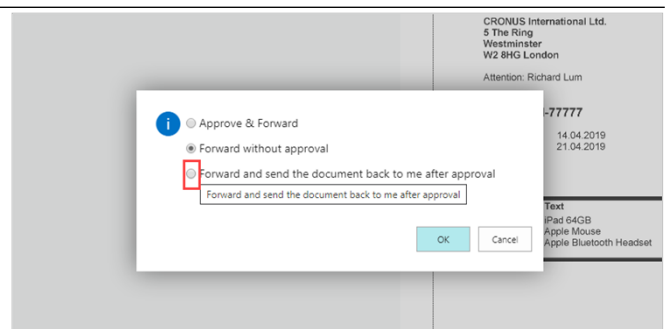
"Approve & Forward" will have you approve the document and then automatically forward the document to an appointed colleague.



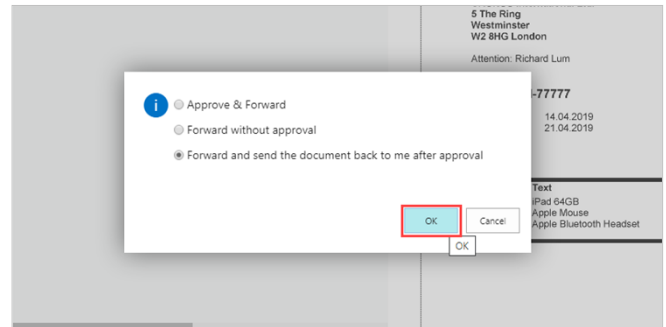
"Forward without approval" forwards the document to an appointed colleague without you approving the document.



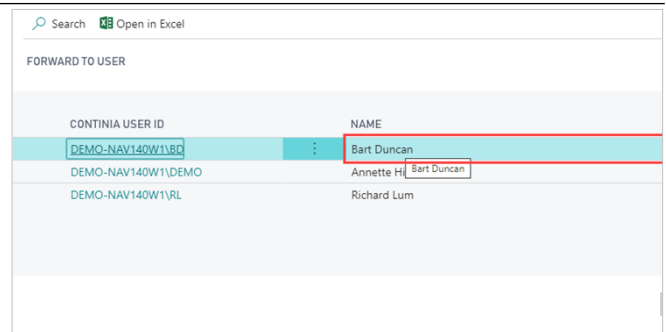
The last option, **"Forward and send the document back to me after approval"**, will forward the document to a chosen colleague and afterward return for your approval.



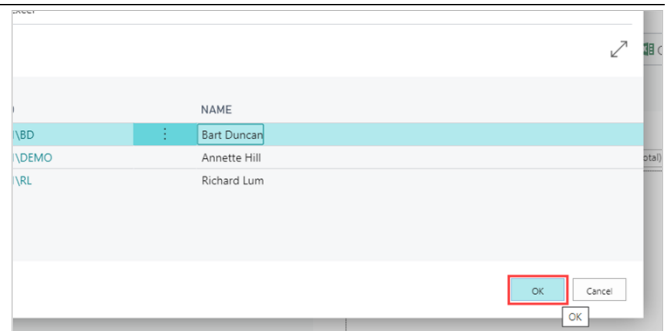
Select **"OK"** to continue.
Selecting **"Cancel"** will return you to the Approval Entries page.



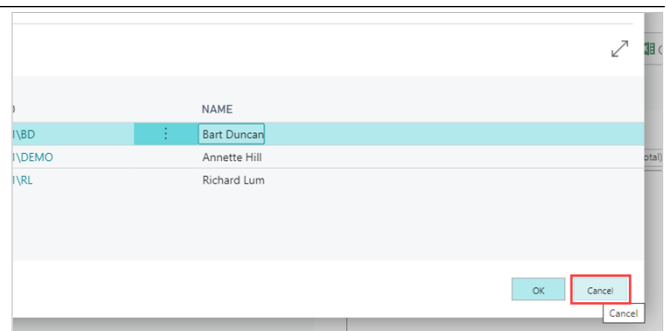
To forward a document, you must choose who is to approve the document.
Today, let's select **"Bart Duncan"** in the list of approvers.



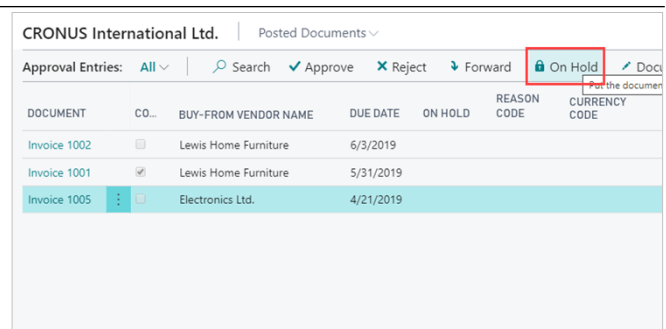
Forward the document by selecting **"OK"**.



If you like to reconsider, select the **"Cancel"** action.
This closes the forward form and returns you to the Approval Entries page.



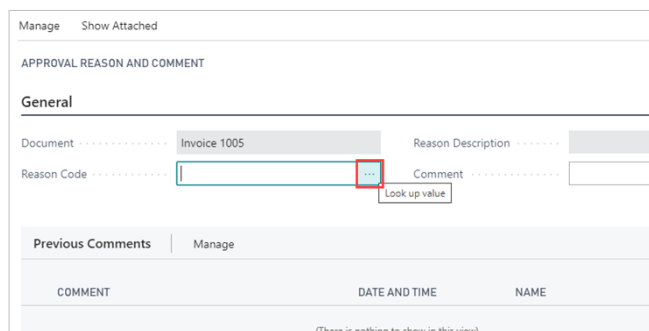
The fourth action at the top of the document page is **"On Hold"**. This action informs the Account Payables department that the document cannot be approved right now. This is often used in situations where the approver disagrees with the vendor about prices or missing deliveries.
Select the action **"On 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 "Look up value" button to the right.



Manage Show Attached

APPROVAL REASON AND COMMENT

General

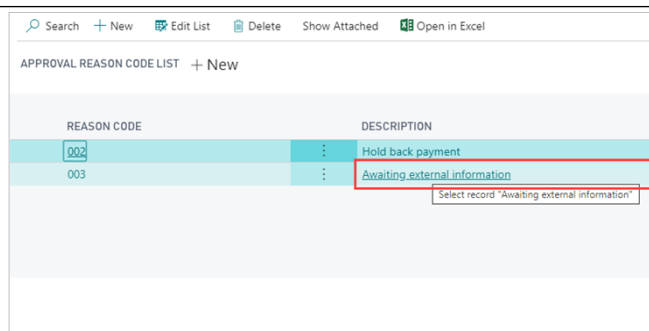
Document Invoice 1005 Reason Description Awaiting external information

Reason Code Look up value

Previous Comments | Manage

COMMENT	DATE AND TIME	NAME
(There is nothing to show in this view)		

Select a reason code. In this situation the "Awaiting external information" is suitable.



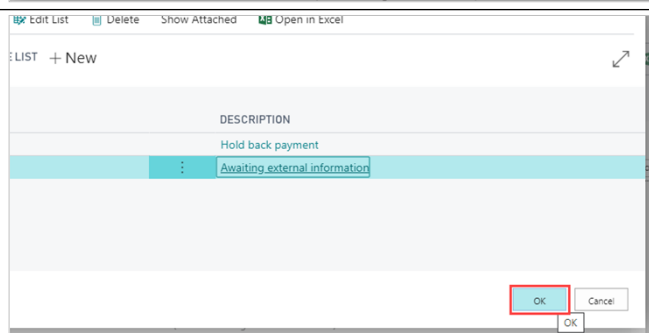
Search + New Edit List Delete Show Attached Open in Excel

APPROVAL REASON CODE LIST + New

REASON CODE	DESCRIPTION
002	Hold back payment
003	Awaiting external information

Select record "Awaiting external information"

Select "OK" to return to the Approval Reason and Comment page.



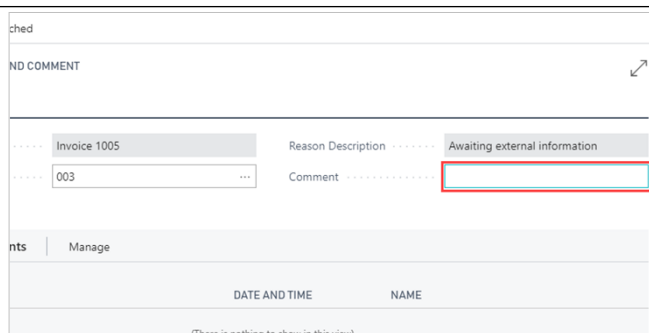
Edit List Delete Show Attached Open in Excel

LIST + New

DESCRIPTION
Hold back payment
Awaiting external information

OK Cancel

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



hed

ND COMMENT

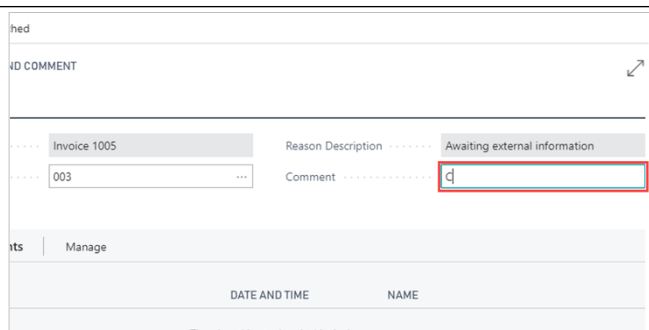
Invoice 1005 Reason Description Awaiting external information

003 Comment

nts | Manage

DATE AND TIME	NAME
(There is nothing to show in this view)	

Type in a comment.



hed

ID COMMENT

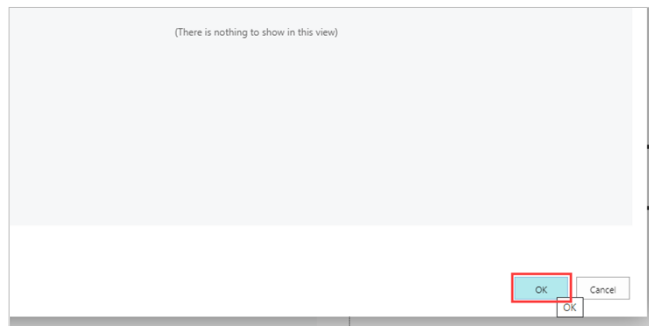
Invoice 1005 Reason Description Awaiting external information

003 Comment d

nts | Manage

DATE AND TIME	NAME
(There is nothing to show in this view)	

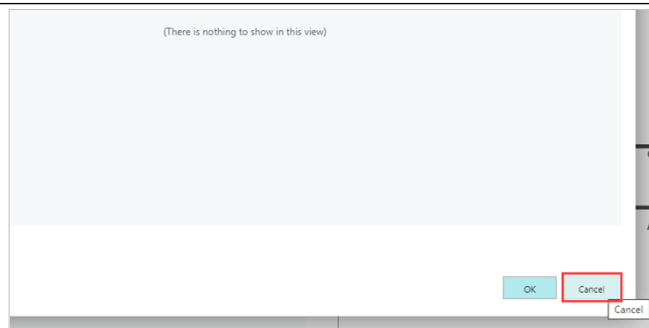
Put the document On Hold by selecting **"OK"**.



(There is nothing to show in this view)

OK Cancel

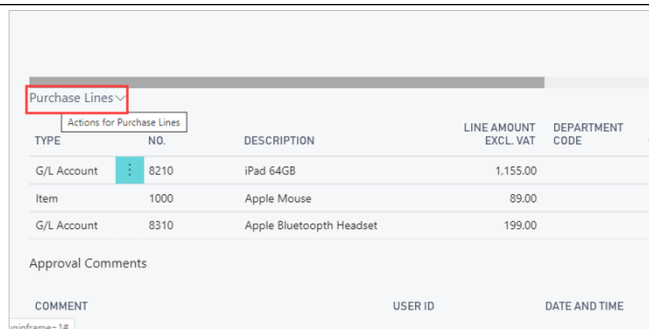
If you like to reconsider, select the **"Cancel"** action. This closes the rejection form and returns you to the Approval Entries page.



(There is nothing to show in this view)

OK Cancel

In the lower part of the page, we have the **"Purchase Lines"** section. Here you can see the lines of the document.

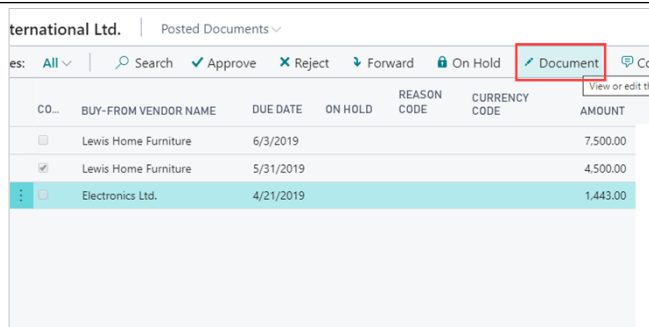


Purchase Lines		Actions for Purchase Lines		LINE AMOUNT	DEPARTMENT	PF
TYPE	NO.	DESCRIPTION	EXCL. VAT	CODE		
G/L Account	8210	iPad 64GB	1,155.00			
Item	1000	Apple Mouse	89.00			
G/L Account	8310	Apple Bluetooth Headset	199.00			

Approval Comments

COMMENT	USER ID	DATE AND TIME
minframes 1#		

When approving the invoices and credit memos, you can add, delete, and modify the document lines. The possibilities for updating the document lines depends on the setup of the individual approvers' general permissions in Business Central. Select the action **"Document"**, at the top of the page.

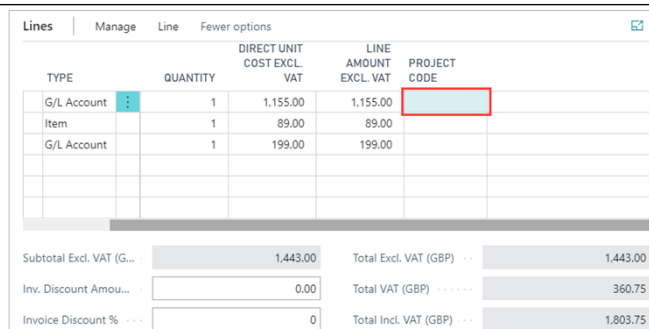


International Ltd. | Posted Documents

es: All Search Approve Reject Forward On Hold Document View or edit the

CO...	BUY-FROM VENDOR NAME	DUE DATE	ON HOLD	REASON CODE	CURRENCY CODE	AMOUNT
	Lewis Home Furniture	6/3/2019				7,500.00
	Lewis Home Furniture	5/31/2019				4,500.00
	Electronics Ltd.	4/21/2019				1,443.00

In this invoice, there are three invoice lines. Everything is filled in according to the company requirements, except for a few details. The Project Code for the G/L account lines is missing. To choose a project code, lookup the value in the **"Project Code"** field.



TYPE	QUANTITY	DIRECT UNIT COST EXCL. VAT	LINE AMOUNT EXCL. VAT	PROJECT CODE
G/L Account	1	1,155.00	1,155.00	
Item	1	89.00	89.00	
G/L Account	1	199.00	199.00	

Subtotal Excl. VAT (G... 1,443.00 Total Excl. VAT (GBP) 1,443.00

Inv. Discount Amou... 0.00 Total VAT (GBP) 360.75

Invoice Discount % 0 Total Incl. VAT (GBP) 1,803.75

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

Fewer options				Item #	Text
NTITY	DIRECT UNIT COST EXCL. VAT	LINE AMOUNT EXCL. VAT	PROJECT CODE	IPAD MOUSE HEADSET	IPad App App
1	1,155.00	1,155.00			
1	89.00	89.00			
1	199.00	199.00			
			CODE	NAME	
			MERCEDES	Mercedes 300	
			TOYOTA	Toyota Supra 3.0	
			VW	VW Transporter	
			Select record "VW"		
			Select from full list		
1,443.00		Total Excl. VAT (GBP)	1,443.00		
0.00		Total VAT (GBP)	360.75		
0		Total Incl. VAT (GBP)	1,803.75		

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 the third line is a GL account, is easily altered. To adjust the account, type in the account number or lookup the value in the "No." field.

Lines Manage Line Fewer options						
TYPE	NO.	DESCRIPTION/COMMENT	QUANTITY	DIRECT UNIT COST EXCL. VAT	LINE AMOUNT EXCL. VA'	
G/L Account	8210	iPad 64GB	1	1,155.00	1,155.0	
Item	1000	Apple Mouse	1	89.00	89.0	
G/L Account	8310	Apple Bluetooth Headset	1	199.00	199.0	
Subtotal Excl. VAT (G...						
				1,443.00	Total Excl. VAT (GBP)	
				0.00	Total VAT (GBP)	
				0	Total Incl. VAT (GBP)	

In this scenario, the account "8210" is the best choice.

Lines Manage Line Fewer options						
TYPE	NO.	DESCRIPTION/COMMENT	QUANTITY	DIRECT UNIT COST EXCL. VAT	LINE AMOUNT EXCL. VA'	
G/L Account	8210	iPad 64GB	1	1,155.00	1,155.0	
Item	1000	Apple Mouse	1	89.00	89.0	
G/L Account	8310	Apple Bluetooth Headset	1	199.00	199.0	
Subtotal Excl. VAT (G...						
				1,443.00	Total Excl. VAT (GBP)	
				0.00	Total VAT (GBP)	
				0	Total Incl. VAT (GBP)	