



USER MANUAL

Elvy – Authorising invoices

Version 2021.03/1

Be efficient. Add control.

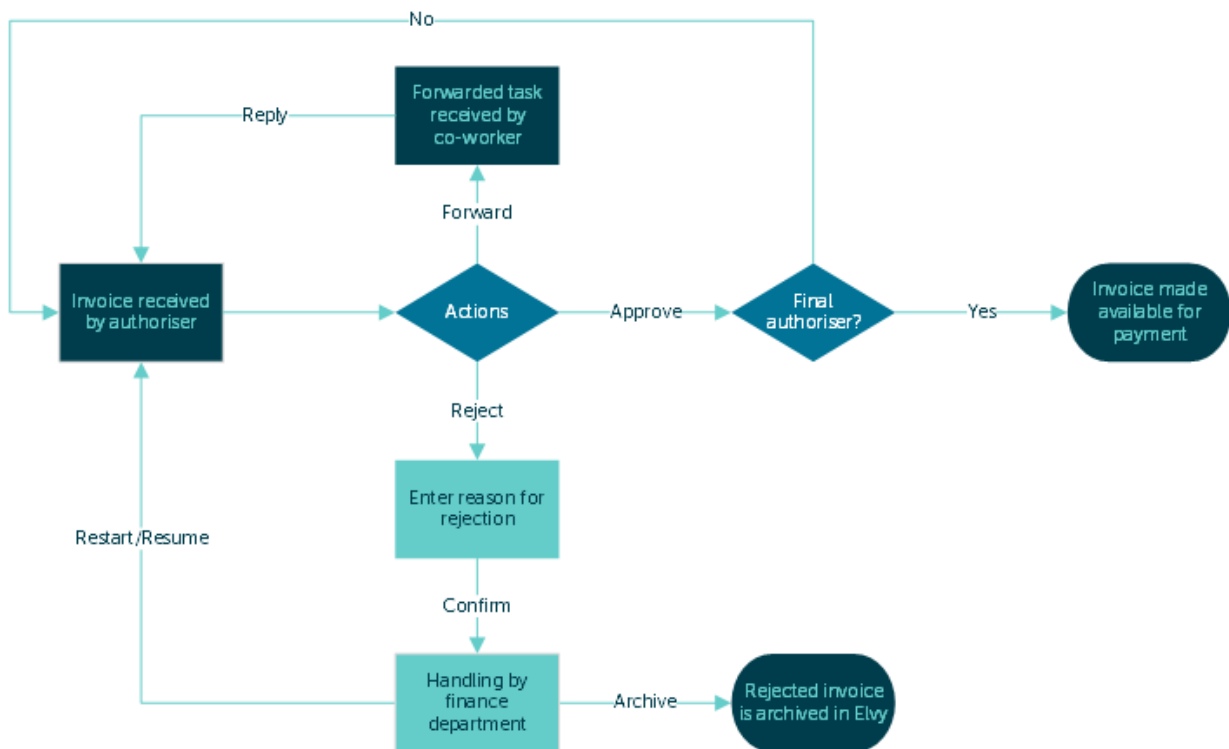
&lvvy.

Elvy – Authorising invoices

Process

As soon as the booking in Elvy is processed to your financial software, the invoice will be archived and blocked for payment in cases where the invoice needs to be approved prior to payment. Elvy offers a broad range of approval possibilities for your organization. The approval process is possible via Elvy Invoice Processing (Elvy Web) or via the Elvy App.

Based on the Invoice Registers (workflows) Elvy defines who should approve a certain invoice and in which order the approval process takes place. As soon as all the required approvers have accepted the booking, it is released and the payment can be made from your financial software.



Tasks

The Elvy approval process works with tasks. Each task is linked to a booking in the financial administration. This booking remains blocked for payment until the invoice has been accepted by all the approvers. Each approver is allowed to add notes or documents to the task. In case of questions, the approver may forward the invoice to any colleague accompanied with a question.

Taksklist

In the tasklist you see different tabs - which ones you see depend on the status of the tasks and your role in Elvy Web.

On the tab **Pending**, all the tasks that you need to process are listed. You are able to approve, reject or forward the tasks. In case one or more tasks cannot be processed, you change the status into 'in progress' and the task will thereafter be shown on the tab named 'In progress'.

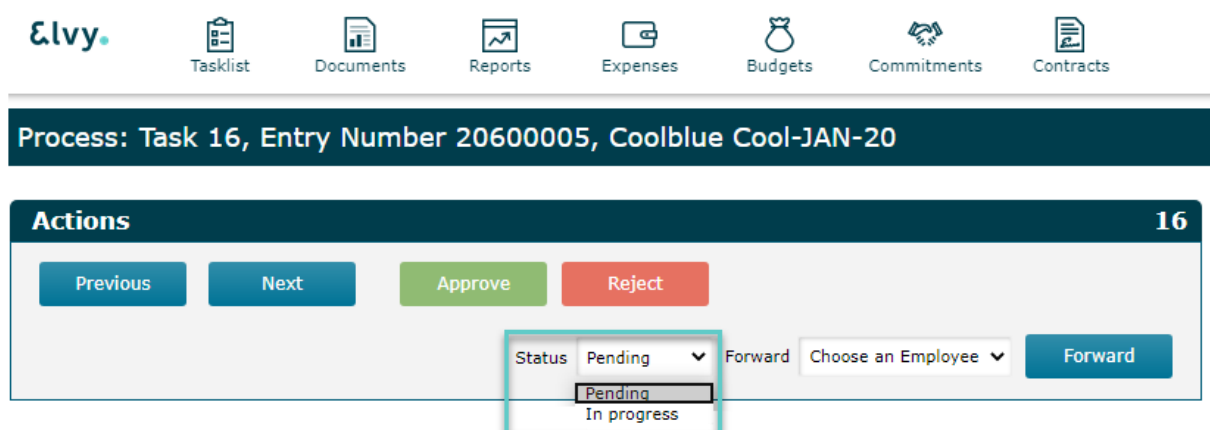
You may also find the tab **Forwarded**. On this tab, all tasks that have been forwarded are listed. Another tab is named **To be handled by others**, which is visible for the persons appointed as manager of other users of the Invoice Registers.

Processing

Each and every task that is assigned to you needs to be processed. This can be done by approving (or rejecting) or by answering someone's question. There is also the possibility to ask a question to a colleague.

Taking a task in progress

As soon as you open a new task for the first time, it will have the status 'Pending'. If you like, you can change this status into 'in progress'. This helps you to keep overview of the different statuses of your tasks and to provide information to your colleagues which have access to Elvy Web. In case you change the status into 'in progress', your colleagues know that you are working on it.

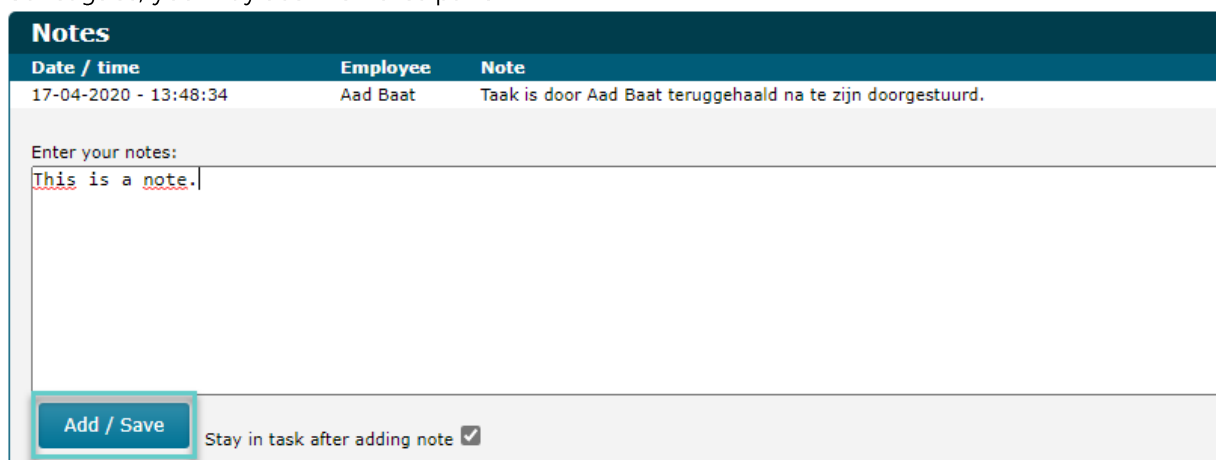


The screenshot shows the Elvy interface with a navigation bar at the top containing icons for Tasklist, Documents, Reports, Expenses, Budgets, Commitments, and Contracts. Below this is a dark blue header for the task: "Process: Task 16, Entry Number 20600005, Coolblue Cool-JAN-20". The main section is titled "Actions" and contains several buttons: "Previous", "Next", "Approve", and "Reject". A "Status" dropdown menu is open, showing "Pending" and "In progress" options. The "Forward" button is also visible.

We recommend you to make a note when you take a task in progress. From now on, the task will be shown on the tab **In progress**.

Adding notes

When you take a task in progress, forward it, or just want to add important information for your colleagues, you may use the notes panel.



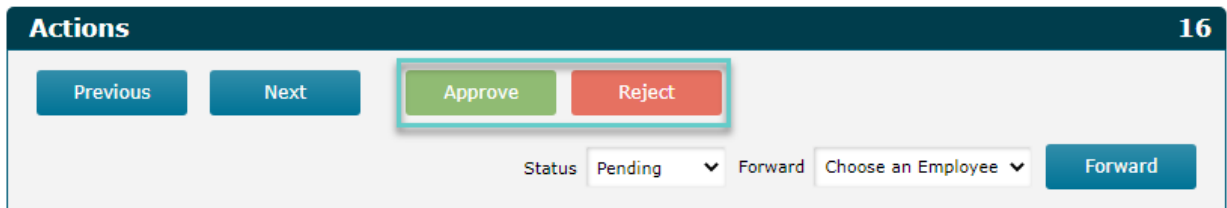
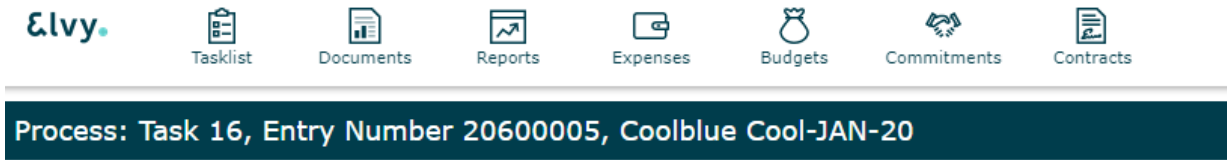
The screenshot shows the Elvy interface with a "Notes" panel. The panel has a table with columns "Date / time", "Employee", and "Note". Below the table is a text input field with the text "This is a note." and an "Add / Save" button. A checkbox labeled "Stay in task after adding note" is also visible.

Simply add a note and press on **Add / Save**.

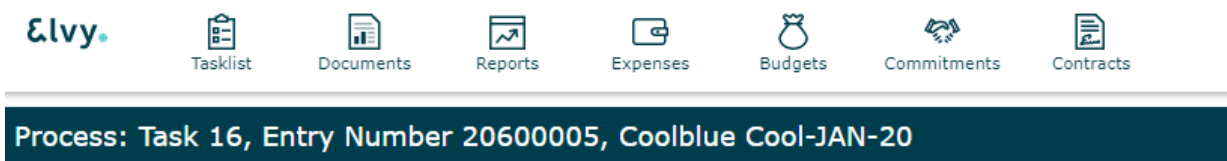
- ✓ In case the option 'stay in the task' is activated, the task will remain open after the note is added. Otherwise, you are redirected to the tasklist.

Assessing

To assess a task, choose either for **Approve** or **Reject**.



To approve a task, simply press the **Approve** button, to reject, press the **Reject** button. In case you reject a task, you are obliged to indicate the reason for rejection.



Press on **Reject** to finalize the rejection of the task.

- i** The reason for disapproval can only be added after you have pressed Reject. The notes area beneath the panel is for entering regular notes

Rejected invoice

When an invoice is rejected, the invoice needs to be processed. This task is dedicated to the 'Manager of Rejection'. In the article (in Dutch) '[Hoe verwerk ik een afgekeurde factuur?](#)' is described how to deal with rejected invoices.

Forwarding

In case you have a question concerning a specific task, you may want to forward the task to a colleague. Select the colleague that you want to consult, fill out the notes and press **Forward**.

⚠ It is not possible to delegate your signing authority, which means that it is not possible to have a colleague Approve or Reject tasks that is dedicated to you.

The screenshot shows the &lvvy. interface for task management. At the top, there is a navigation bar with icons for Tasklist, Documents, Reports, Expenses, Budgets, Commitments, and Contracts. Below this, a dark blue header displays the task details: "Process: Task 16, Entry Number 20600005, Coolblue Cool-JAN-20".

The main section is titled "Actions" and contains several buttons: "Previous", "Next", "Approve", and "Reject". Below these buttons, there is a "Status" dropdown menu set to "Pending". To the right of the status, there is a "Forward" button and a "Choose an Employee" dropdown menu. The "Forward" button is highlighted with a red border, and the "Choose an Employee" dropdown menu is open, showing a list of employees: "Choose an Employee", "Bosma, Huib", "Crujff, Chris", "Monroe, Karel", "Sang, Tamara", and "Shaw, Taylor".

Below the "Actions" section, there is a "Notes" section. It has a table with columns "Date / time", "Employee", and "Note". The first row shows a note from "Aad Baat" dated "17-04-2020 - 13:48:34". Below the table, there is a text area for entering notes, with the text "Enter your notes:" and "Enter a question for your colleague." Below the text area, there is an "Add / Save" button and a checkbox labeled "Stay in task after adding note" which is checked.

When you have forwarded a task, you can only approve or reject this task after it has been answered by the person to whom the task was forwarded.

i Forwarded tasks are displayed in the tab named Forwarded and are displayed in the Tasklist with a red background.

Answering

It is good to know that a task that has been forwarded to you can only be processed after you have replied. In some cases, you are obliged to add an enclosure; in that case you will be notified hereof.

Actions 16

Previous Next Answer Save

Enter your answer here

Yes, this is the price is what we agreed upon.

After you typed the answer in the note field, press on **Answer**.

Searching

It is easy to search within Elvy Web: either from the task, the Tasklist or the search screen.

Searching from the task

By pressing the **Search** button on the **Description** panel, you can easily request all tasks for the actual creditor.

Description

Description:	Cool/8003
Account:	60029 Coolblue
Address:	Weena 664
City:	3012 CN Rotterdam NL
Website:	www.coolblue.nl
Phone / Fax:	328-110187035
Company:	100 EnYoi ICT Services B.V. (1) / EV200003 / 1715 / (completed)
Financial software:	AFAS
Register code:	ALGEMEEN Algemene kosten
Creator:	ELVY

Search

Searching within the tasklist

Within the Tasklist you can filter by each column, so that the results shown match your personal preferences. The filtering can be adjusted on each tab separately, whereas these settings will be saved; also when you use Elvy Web on another device.

The screenshot shows the Elvy Tasklist interface. At the top, there are navigation icons for Tasklist, Documents, Reports, Expenses, Budgets, Commitments, and Contracts, along with a Search icon and a user profile icon for Aad Baat. Below the navigation bar, the 'Tasklist' header is visible. A status bar shows 'Pending (6)', 'In progress (1)', 'Forwarded (1)', 'Rejected (1)', 'Posts (1)', and 'To be handled by others (6)'. The main table has a header row with columns: Bulk, Start date, Entry, Description, Invoice date, Account name, Task, Person, Co. No., Last note, and Total. The 'Account name' column is highlighted with a search filter 'blue'. Below the header, there is one row of data: 14-04-2020, 20600005, Cool-JAN-20, 31-01-2020, Coolblue, 16 Aad Baat, 100, Taak is door Aad Baat teruggehaald na te zijn door, and 74,00. A 'Total' of 74,00 is shown at the bottom right of the table.

Fill out (a part of) the text that you want to filter on and press **Start filter**. To clear all filters, press **Clear**.

Searching via the search screen

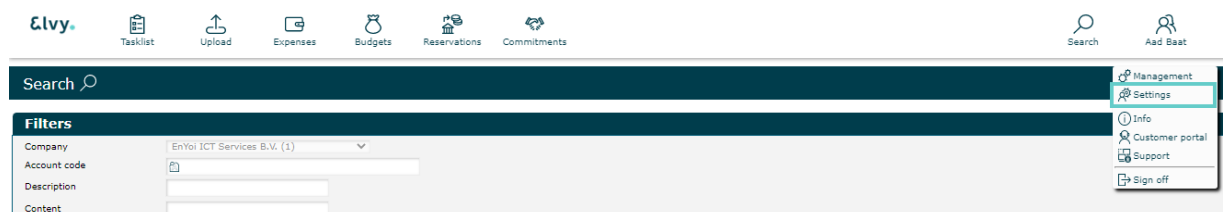
By pressing the magnifier-icon, on the top-right of your screen, the search screen will open. You can search on multiple fields, per business administration or over all administrations at once.

The screenshot shows the Elvy Search screen. At the top, there are navigation icons for Tasklist, Upload, Expenses, Budgets, Reservations, and Commitments, along with a Search icon and a user profile icon for Aad Baat. Below the navigation bar, the 'Search' header is visible. The main area is titled 'Filters' and contains a list of search criteria with input fields: Company (Entoi ICT Services B.V. (1)), Account code, Description, Content, Notes task, Comment, Account name, Entry number, Created (with date pickers), Invoice number, Invoice amount incl. VAT, Invoice amount excl. VAT, Invoice date (with date pickers), Due date (with date pickers), Project, G/L Account, Cost centre, Cost unit, Specif 1-5 (with dropdown menus), Register code, and Document type. At the bottom, there is a 'Search in' section with radio buttons for Tasks (selected), Expenses, Cost, and Contracts. A 'Search' button is located at the bottom left of the filters section.

Settings

i This chapter is only applicable when you have access to the user settings.

It is possible to adjust the view of the tasklist and the task screen to your preferences via the **User settings**. To open these settings, click on the user name (or the icon just above the name). Then, select the option **Settings**.



General

On the tab **General**, it is possible to change the settings shown below.

The screenshot shows the 'User settings' dialog box with the 'General' tab selected. The settings are as follows:

- Language: English
- Show PDF instead of previews:
- Open Elvy in: Incoming invoice register
- Automatically open tasks:
- Amount documents per page: 50
- Password: [Change password](#)
- Amount uploaded documents a page: 20
- Number of tasks per page: 50
- Number of messages to retrieve: 150
- Show totals in tasklist:
- Number of messages shown per page: 15
- Sequence start date: Descending
- Apply settings to all users:

Buttons for 'Cancel' and 'Save' are at the bottom left.

Language	Available languages within Elvy Web
Show PDF instead of previews	The preview of the document (the invoice) is standard shown as PDF file. By de-activating this setting, the document will be shown as a set of separate pictures, limited to two pages.
Open Elvy in	The preferred part within Elvy Web that is displayed on opening the program. The options depend on the modules listed in your license.
Automatically open tasks	As soon as a task from the tasklist (tab Pending) is handled (approved, rejected or forwarded) the next task will be opened automatically.
Password	Users are allowed to change their password. In case the option 'Users cannot change the settings' is activated in the Administrator settings, the user will have an extra menu option, Change password .
Number of tasks per page	Number of lines per page.
Search results per page	Number of search results per page.
Number of messages to retrieve	Maximum number of notifications which are displayed in the log, on the menu Info , on the tab Notifications

Taskview

On the tab **Taskview** you can set your preferences for the order in which the information is shown in the task.

- ★ You can also sort the order of the panels in the task by moving the panels with your mouse pointer. Please note that changes made with your mouse will not be saved.

Part	Position	Options
Actionbuttons	1	
Progress	2	
Notes	3	
Task description	4	
Financial entries	5	
Attachment	6	
Attachment preview	7	Show preview next to job Show as PDF
Linked information	9	

You can choose where and how the document preview is shown.

Position

- **Show preview next to job:** The preview will be placed on approx. 1/3 of your screen size.
- **Show preview:** Display the preview in a separate panel.
- **Link to preview:** Display a hyperlink to the PDF-file.

Display

- **Show as PDF:** Show the preview as PDF. A PDF-plugin is required for the concerning web browser.
- **Show as image:** Show a maximum of two pages of the preview as an image

Tasklist

On the tab **Tasklist IFR** you can indicate your preferences for the order of the fields displayed as columns in the tasklist. For some specific fields, it's also possible not to show them, by selecting the option **Do not show**.

User settings

General
Taskview
Display OD & KV panels
Tasklist IFR
Tasklist Expenses
Tasklist Budgets
Tasklist Commitments
Search page settings

Column

Start date	2	Entry	3	Description	4
Account code	0 (hidden)	Account name	6	City	0 (hidden)
Task	8	Company	0 (hidden)	Person	10
Document	0 (hidden)	Address 1	0 (hidden)	Address 2	0 (hidden)
Address 3	0 (hidden)	Postal code	0 (hidden)	Country	0 (hidden)
E-mail	0 (hidden)	Website	0 (hidden)	Phone	0 (hidden)
Fax	0 (hidden)	Co. No.	21	Journal	0 (hidden)
Register code	0 (hidden)	Total amount	25	Invoice date	5
Total amt. excl. VAT	0 (hidden)	Document type	0 (hidden)	Due date	0 (hidden)
Invoice number	0 (hidden)	Cost centre	0 (hidden)	Cost unit	0 (hidden)
Bank account number	0 (hidden)	Paid by account	0 (hidden)	Cur.	0 (hidden)
Authorization Level	0 (hidden)	Notes	0 (hidden)	In treatment by	0 (hidden)
Rejection reason	0 (hidden)	Last note	24	On hold status	0 (hidden)
Purchase order	0 (hidden)	Specif 1	0 (hidden)	Specif 2	0 (hidden)
Specif 3	0 (hidden)	Specif 4	0 (hidden)	Specif 5	0 (hidden)

Cancel
Save
 Apply settings to all users

Search page

On the tab **Search page settings** you can indicate which fields are shown in the search results. For each field you can choose between **Display** and **Hidden**, to indicate whether a column will or will not be shown in the list with search results.

User settings

General
Taskview
Display OD & KV panels
Tasklist IFR
Tasklist Expenses
Tasklist Budgets
Tasklist Commitments
Search page settings

Filter columns search result

Company	Display	Account code	0 (hidden)	Description	Display
Content	0 (hidden)	Notes task	0 (hidden)	Comment	0 (hidden)
Account name	Display	Entry number	Display	Created	Display
Invoice number	Display	Invoice amount incl. VAT	Display	Invoice amount excl. VAT	Display
Invoice date	Display	Due date	Display	Register code	Display
Document type	0 (hidden)				

Cancel
Save
 Apply settings to all users