USER MANUAL

Elvy – Authorising invoices

Version 2021.03/1

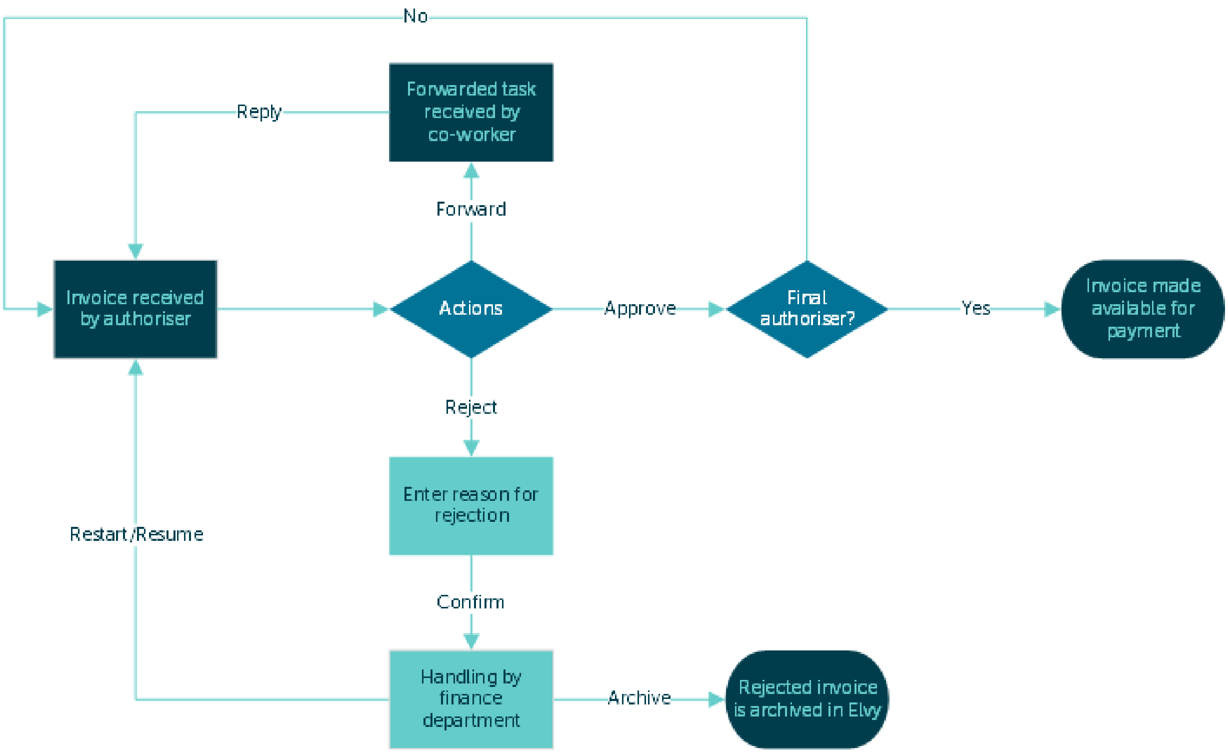
Be efficient. Add control.

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'.

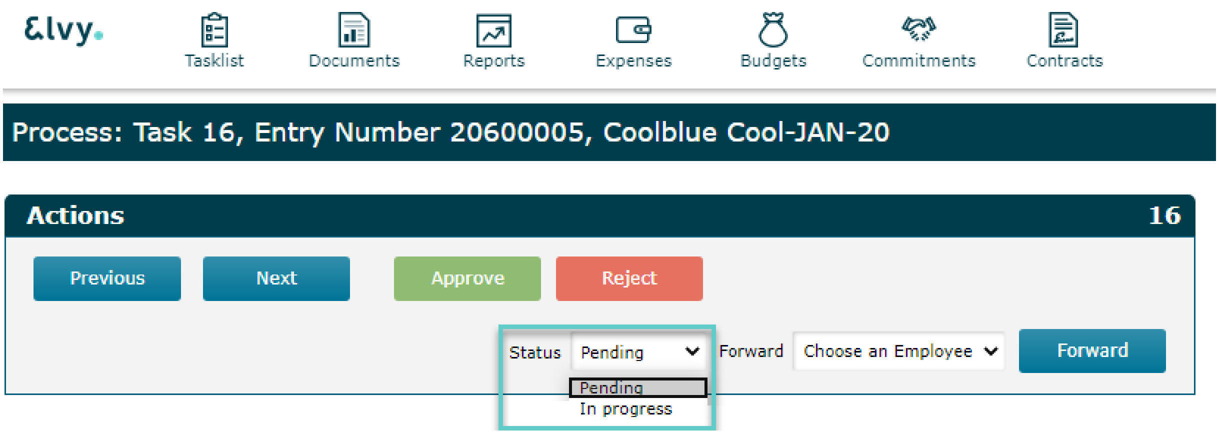
You may also find the tab **Forwarded**. On this tab, all tasks that have been forwarded are listed. Another tab is named **To be handled by others**, which is visible for the persons appointed as manager of other users of the Invoice Registers.

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

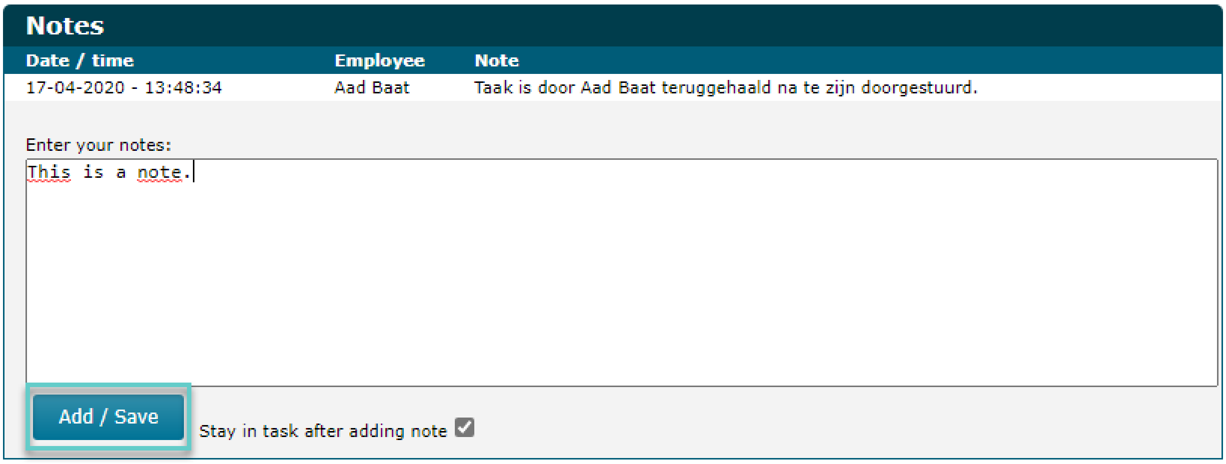
As soon as you open a new task for the first time, it will have the status 'Pending'. If you like, you can change this status into 'in progress'. This helps you to keep overview of the different statuses of your tasks and to provide information to your colleagues which have access to Elvy Web. In case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



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.

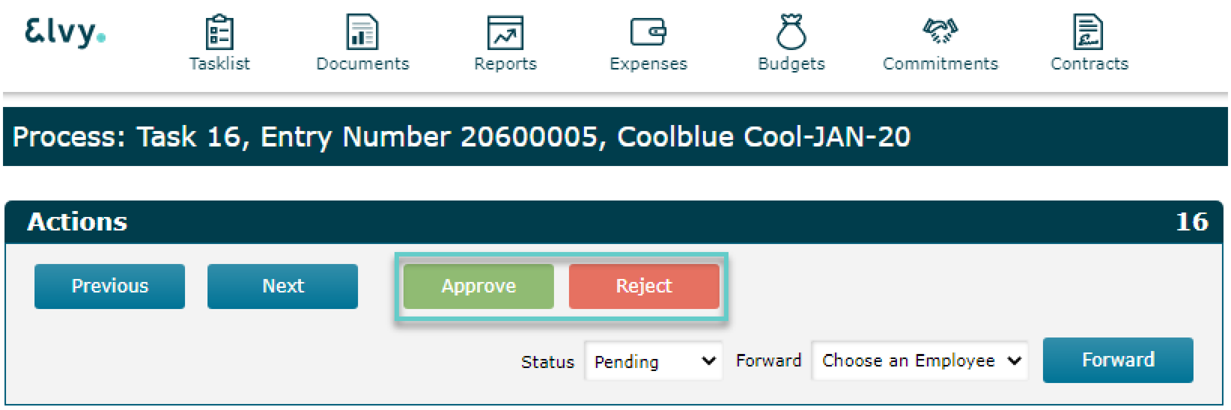


Simply add a note and press on **Add / Save**.

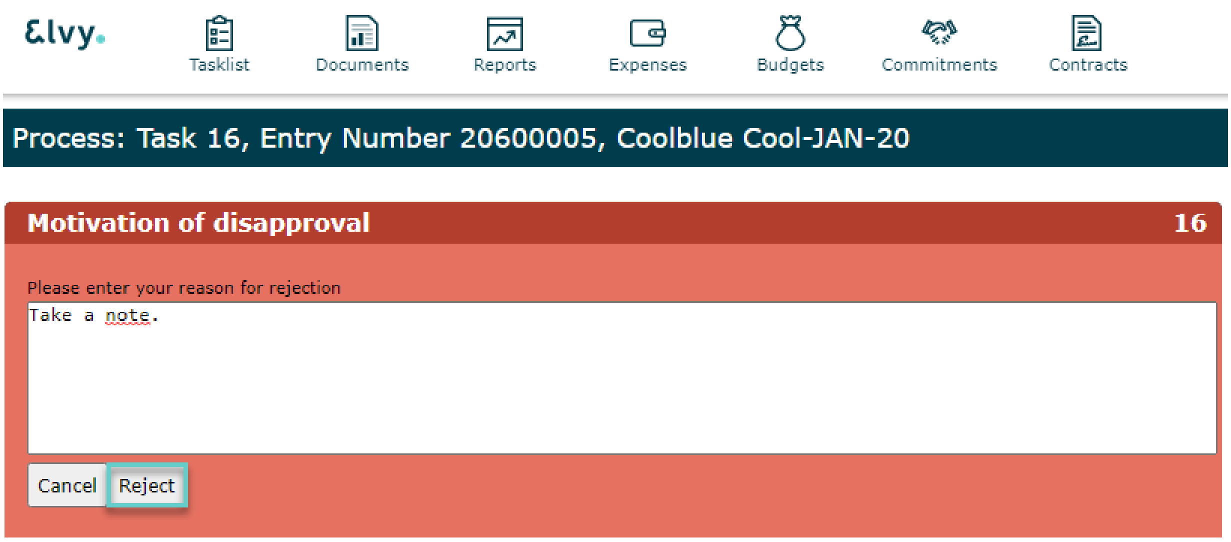
In case the option 'stay in the task' is activated, the task will remain open after the note is added. Otherwise, you are redirected to the tasklist.

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.

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

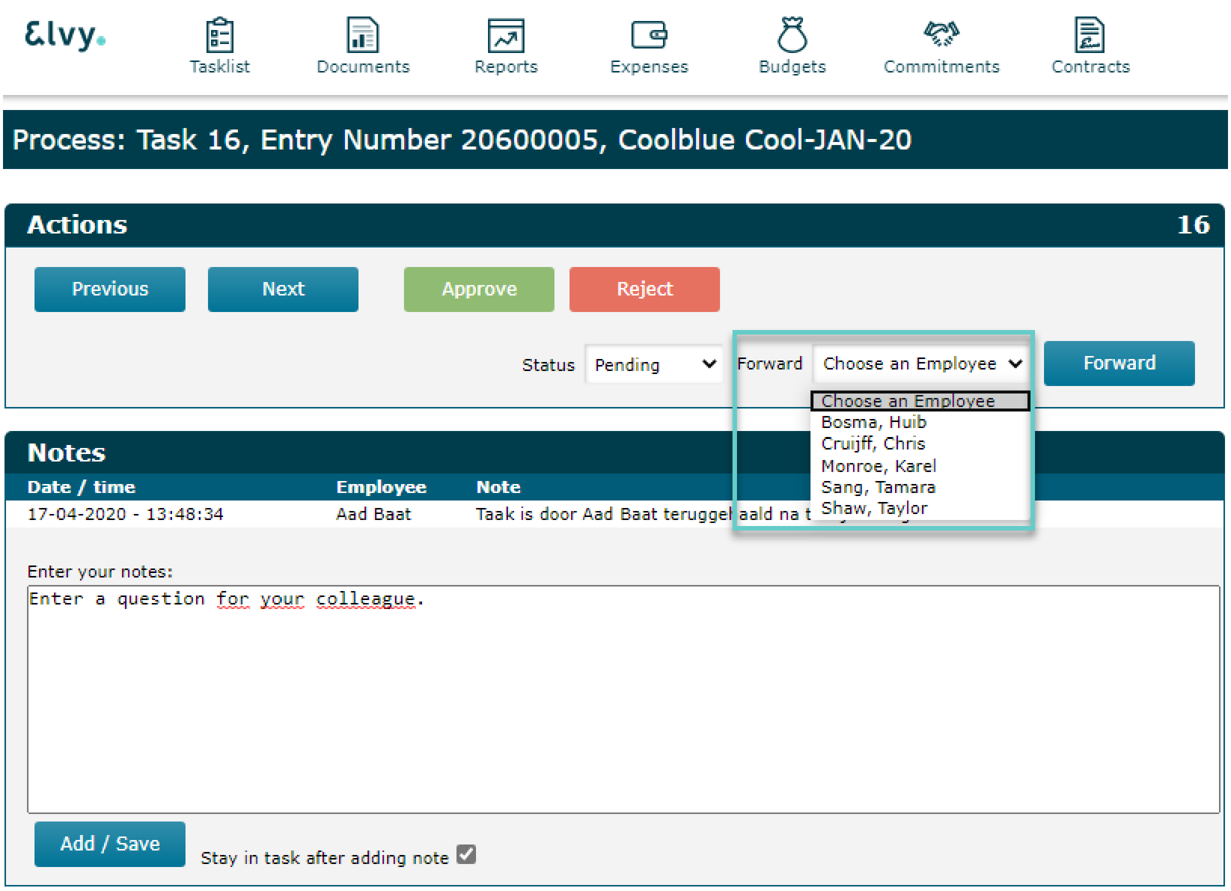
Rejected invoice

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.

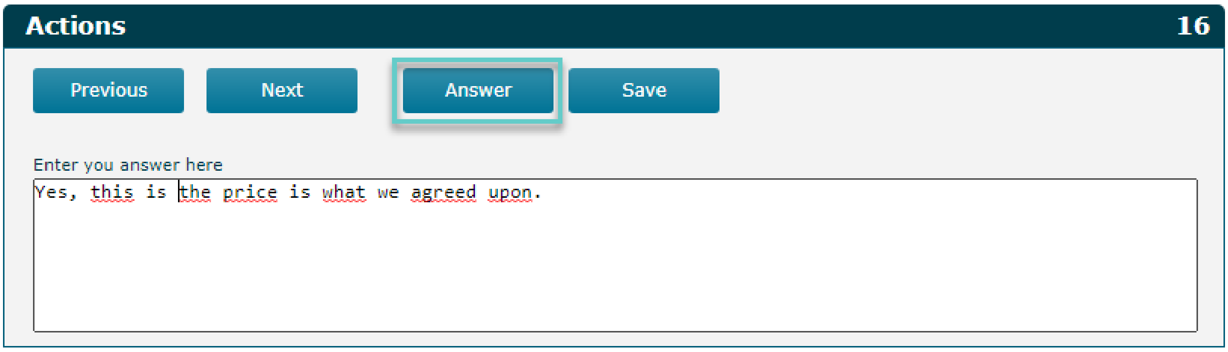


When you have forwarded a task, you can only approve or reject this task after it has been answered by the person to whom the task was forwarded.

ⓘ 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.



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

Searching

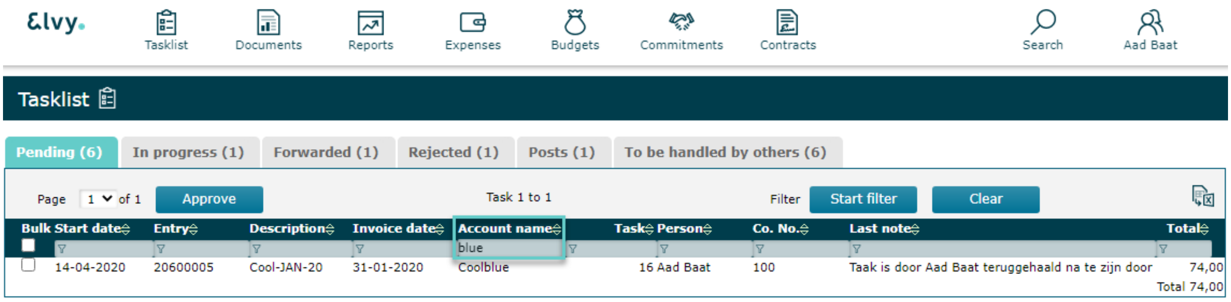
It is easy to search within Elvy Web: either from the task, the Tasklist or the search screen.

Searching from the task

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

Searching within the tasklist

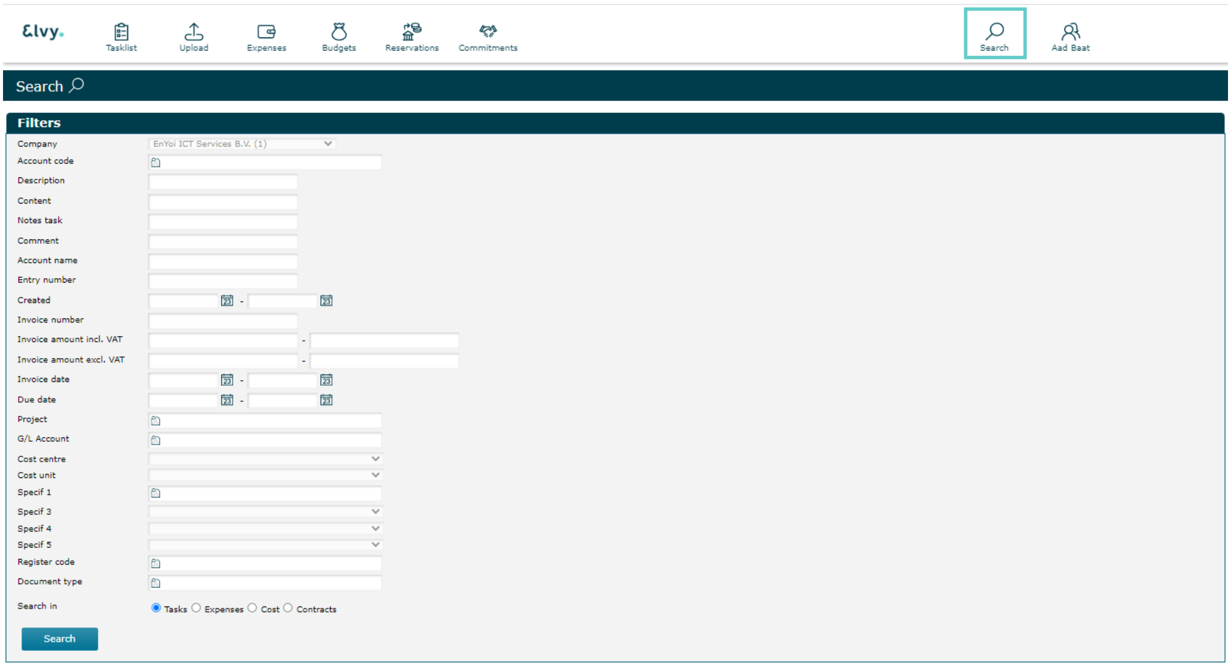
Within the **Tasklist** you can filter by each column, so that the results shown match your personal preferences. The filtering can be adjusted on each tab separately, whereas these settings will be saved; also when you use Elvy Web on another device.



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

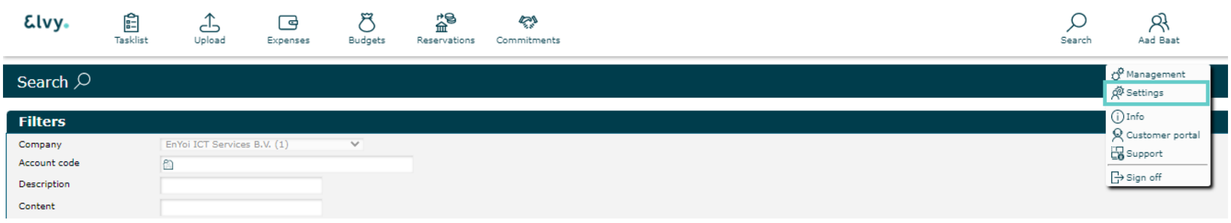
By pressing the magnifier-icon, on the top-right of your screen, the search screen will open. You can search on multiple fields, per business administration or over all administrations at once.



Settings

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

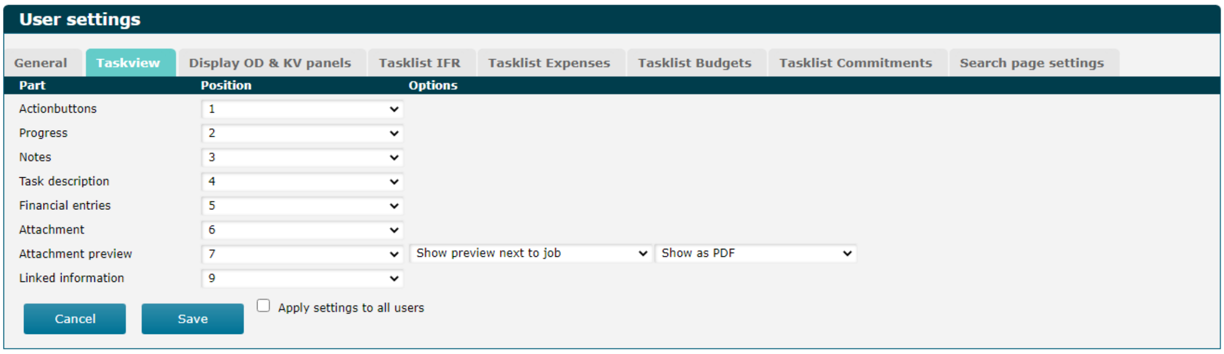
On the tab **General**, it is possible to change the settings shown below.

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.



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

Position

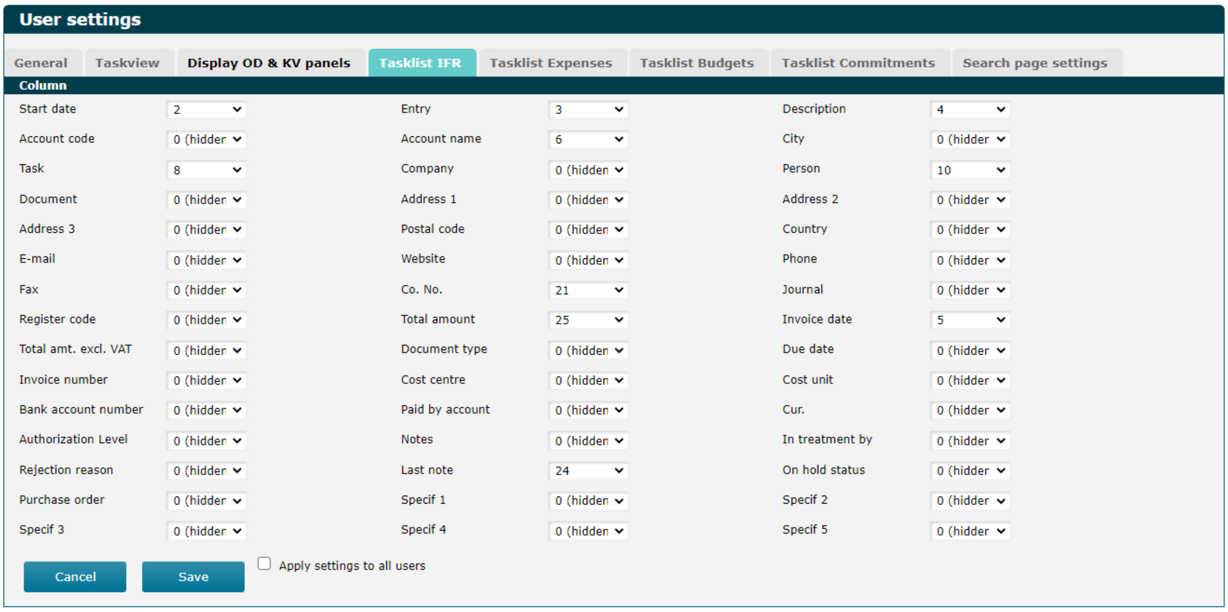
- **Show preview next to job**: The preview will be placed on approx. 1/3 of your screen size.
- **Show preview**: Display the preview in a separate panel.
- **Link to preview**: Display a hyperlink to the PDF-file.

Display

- **Show as PDF**: Show the preview as PDF. A PDF-plug-in 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**.



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.