Invoice Approval Paths

A new feature in ProcureAZ version 10.0 is the addition of approval paths for invoices. Prior versions of ProcureAZ send invoices to all the AP Supervisors, and any user with the role of AP Supervisor could approve the Invoice. The new Invoice Approval paths will allow agency administrators to control which approvers are designated to approve invoices, based on the familiar approval path parameters already in use for other documents. The Internal Administrator or Organization Administrator role is required to configure the approval paths.

Internal Administrators must create a new approval path specifically for invoicing.
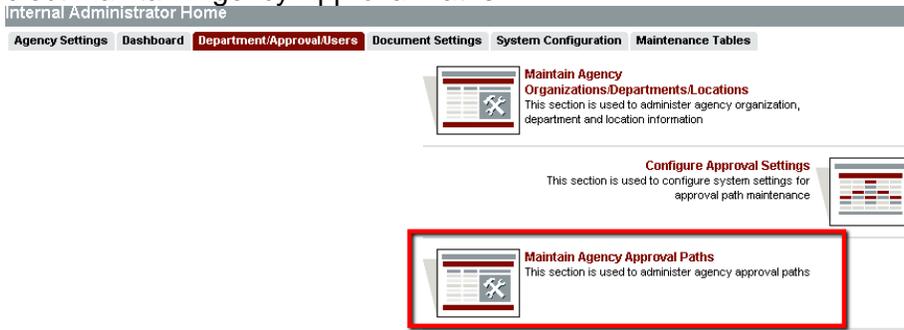
Configure a New Approval Path for Invoicing

Be sure you are in the proper organization.
Navigate to the Internal Administrator tab,
    Choose Administer Agency and click on the Department /Approval /Users tab.
    Select Maintain Agency Approval Paths

    Click on the button Add new approval path..

The General Tab

At the general tab enter the following:
- approval path id,
- organization name,
- description,
- approval type,
- and dollar range.

Be sure to have accounts payable checked under the Roles.

Note: the approval path defaults to active. If you do not want invoices to trigger this path while you are still editing it, it is recommended that you change the status to Inactive until you are ready to use the invoice approval path.

On the General Tab of the approval path the roles that should be selected for invoicing are the two sub-types invoice with Change Order, Invoice-Regular. Note: The invoice change order is a new functionality in BSO 10.0 allowing AP users to make changes to the accounting on a PO.

Add approvers to approve the invoices. Only users with the role Approver will be available to add. You may select names from the drop-down menu or use the search feature to search for a specific approver.

To search for an approver, click the eyeglass icon

Input desired search choices (First Name, Last Name, Login ID, Department, Location, and/or User role)
    Click Find it
    Select radio button next to desired approver, and click Select

Each approval level must have one primary approver. An alternate approver may be selected for each level.
Approvals will move in number order from lowest to highest approval level.

Click Save and Continue

The Misc/Freight Tab

To configure an approval path to trigger if the Misc/Freight is changed, go to the Misc/Freight Tab.

Input dollar change and/or Percent Increase that will trigger the approval path.
Click Save & Continue

The Department/Location tab

At present time, routing invoice approvals by department and location is not supported. Do not make any entries at this tab, or the approval path will not trigger for invoices. (sidenote: this means that you cannot simply tack Invoice on to the document types of other approval paths, for those typically trigger based on department and location because the invoice path will never trigger)

The Email tab

The Email tab is used to designate whether email notifications will be sent notifying users that the invoice has been submitted for approval.

Select whether to Send Email.
If no additional selections are chosen, a default notification email will be sent to the approvers that an invoice is in their queue for approval.

To customize the email select 'Customize Email Content'

Email will always be sent to the next approver. You may also select additional system users to receive notifications by CC or BCC that the invoice is ready for approval. (NOTE: in this case the system users do NOT have to be approvers. They will

Approval Path INV-1 - Invoice approvals dept 100

General Change Order Misc/Freight Department/Location **Email** Vendor Summary

Format email to be sent to the approvers for this path

☑ Send Email

☐ Customize Email Content

To   Next Approver

CC	User ID	User Name	Email	Delete
new:				
new:				

BCC	User ID	User Name	Email	Delete
new:				
new:				

Subject*
[Append Doc ID]

Email Message*
[Append Standard Text]
[Append Doc ID]

ⓘ At the time the email is sent, $$DOC_ID$$ will be replaced with the real document ID prefixed with document type (e.g. Open Market Purchase Order 000005:1)

[Save & Continue]   [Reset]

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not be asked to approve, they will simply be notified that the invoice has been submitted for approval).

Completing the approval path

The Change Order and Vendor Tabs are not applicable to the Invoice Approval Path, and are not active.

Go to the Summary Tab, review all your entries.
Return to the General tab, set the status to Active, and the approval path will be available for use.

The Invoice approval process

When an invoice is submitted for approval, just as with other documents, BuySpeedOnline will display the list of approval paths that the invoice will hit.

Once the AP User selects 'Submit', the routing tab on the invoice document will be populated with the approval paths and approvers. If configured, an email to the first approver on the invoice will be sent. As the invoice progresses through approval, information about the approver that approves the invoice, the approver type, level and the date that the document was approved or canceled will be added to the routing tab, and also to the summary tab of the invoice.

General Items Credits Subcontractors Accounts **Routing** Attachments Notes Reminder Change Order Summary Back to PO

Approval Path

Approver	Level	Approver Type	Date Requested	Date Approved/Disapproved/Canceled	Approved/Disapproved/Canceled by	Comment View
			There are no approval paths found for this purchase order.			