

FINANCIALS

# Configuration and Using Invoice Manager

IM

**Product**

June 2025

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# 1. Contents

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## 2. Introduction

### **Overview**

#### **Invoice Manager Overview**

We are excited to introduce Invoice Manager, a new feature available within the procurement portal. With an intuitive, user-friendly interface, efficiently manage the coding and routing of all purchase invoices. Proactively monitor and resolve mismatch queries, ensuring swift and accurate resolution. Streamline manual workflows, automate processes, and accelerate invoice approvals for enhanced efficiency and financial control.

#### **Accessing Invoice Manager**

To access Invoice Manager, navigate to the procurement portal and select the relevant menu option. From there, you will be able to manage your Accounts Payable transactions in a streamlined and efficient manner.

#### **Key Features of Invoice Manager**

- **Single View:** Invoice Manager provides a single, unified view of all Accounts Payable transactions, making it easier to track and manage your invoices.
- **Built-in Workflow:** The tool includes a built-in workflow feature, allowing you to automate and streamline your Accounts Payable processes.

#### **Setup and Processing**

To get started with Invoice Manager, you will need to set it up your users to allow access.

Once set up, Invoice Manager will enable you to process your Accounts Payable transactions more efficiently, reducing the risk of errors and improving overall financial management.

#### **Getting Started with Invoice Manager**

If you have any questions or need assistance with setting up or using Invoice Manager, please don't hesitate to reach out to our support team. We are here to help you get the most out of this powerful tool.

## 2. Invoice Manager Setup

Firstly, the user must be given access to the Invoice Manager role.

Access the Financials System and follow the menus below.

Menu access: **Main Menu>System Admin>System Wide Controls>Portal Roles**

Locate the user you require to amend or use the insert action to create a portal role(s) for an existing user.

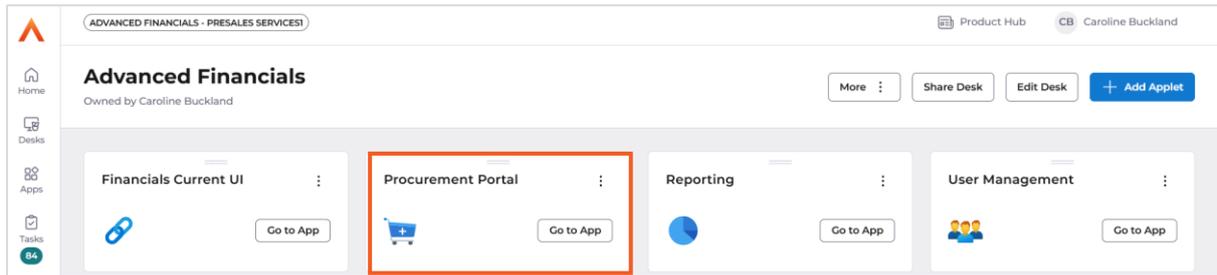
The **Invoice Manager** role requires selection. One role will need to be defined as default if not already set. The user can change the default when they login into the Procurement Portal.

The screenshot shows the 'Portal Roles Edit' interface for user S5000004. The user's email is CAROLINE.BUCKLAND@ONEADVANCED.COM. The 'Default Role' is set to 'Buyer'. A table lists the following roles:

Select	Role	Purchase Group	Update Date	Update Time	Update User	Creation Date
<input checked="" type="checkbox"/>	Authoriser		04-Oct-2023	11:43:29	S5000004	12-Mar-2021
<input checked="" type="checkbox"/>	Buyer		04-Oct-2023	11:43:29	S5000004	15-Sep-2023
<input checked="" type="checkbox"/>	Requisitioner		15-Sep-2023	12:42:45	S5000004	15-Sep-2023
<input checked="" type="checkbox"/>	Tech Administrator		22-Sep-2022	10:22:06	S5000004	25-May-2021
<input checked="" type="checkbox"/>	Receiver		12-Mar-2021	15:23:53	S5000004	12-Mar-2021
<input checked="" type="checkbox"/>	Administrator		21-Jul-2022	10:14:09	S5000004	25-May-2021
<input checked="" type="checkbox"/>	Clearance		12-Mar-2021	15:23:53	S5000004	12-Mar-2021
<input checked="" type="checkbox"/>	Invoice Manager		13-Feb-2025	08:01:31	S5000004	13-Feb-2025

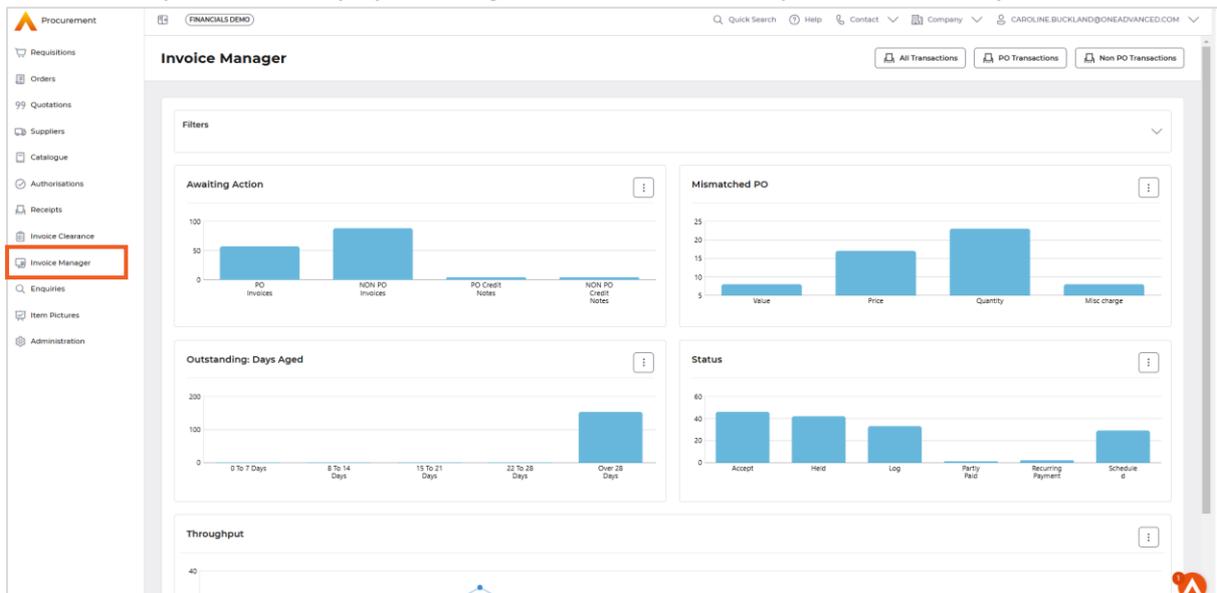
## Navigation

The user can now login to the **Procurement Portal** by selecting the Icon on the One Advanced Platform.

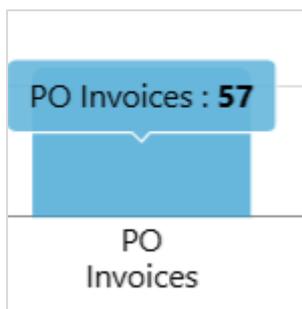


Select the **Invoice Manager** option from the menu option.

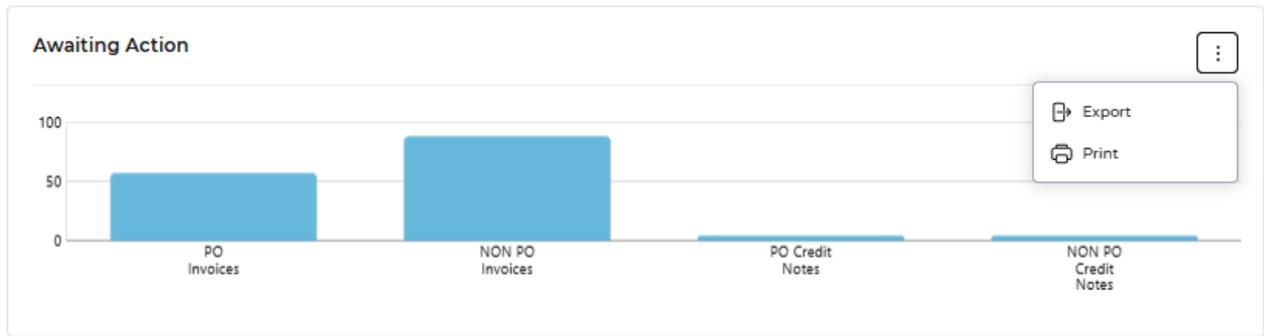
The Summary screen is displayed; this gives an overall view of your Accounts Payable Transactions.



Hover the mouse over each status and that will display the number of transactions relating to each.



Each graph has an option to **Export** or **Print**; you can locate these options by selecting the three dots placed on the right side of each graph.



There are Filters that can be used refine your search, these are available for each graph. Select the Filters box to display the search fields.

Filters ▼

**Invoice Manager**

**Filters**

Supplier	Status: All Open	Transaction Type: All
Owner	PO number	Team
Dispute Code	Mismatch Code: Select Mismatch Code	Invoice Date: Select Date
Due Date: Select Date		

Once your selection is made the **Search** button can be used.

The parameters will be held for your next search so remember to use the **Reset** button, when you access the filters again.

Buttons at the top of the screen represent the following.



**All Transactions** – display all order related and non-order related transactions

**PO Transactions** – displays only order related transactions

**Non-PO Transactions** - display only non-order related transactions

## Graphs explained

### Awaiting Action

Shows Invoices of all statuses, this is very similar to the list of invoices you would see in the Accounts Payable Enquiry screens. You will see various invoice status here, they are grouped by Order Related transactions and non-order related transactions.

Selecting each status will drill you down to the transactions, where more actions and enquiries are available.

Example of some of the statuses of transactions.

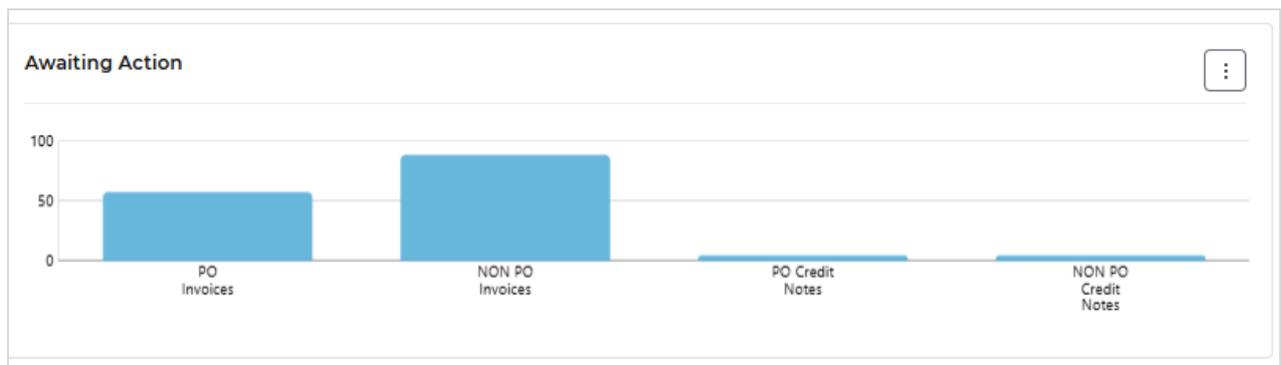
**Due** – due for payment

**Overdue** – overdue for payment

**Held** - due to a mismatch to a purchase order or goods received note

**Logged** – Log requires the line details to be added

**Accepted** - – ready to be paid but not yet reached the due date



## Mismatched PO

Shows the four different mismatches that can occur in Financials, these invoices have been matched to purchase orders and goods received notes, but an issue has occurred, so these transactions are awaiting further processing.

**Value**

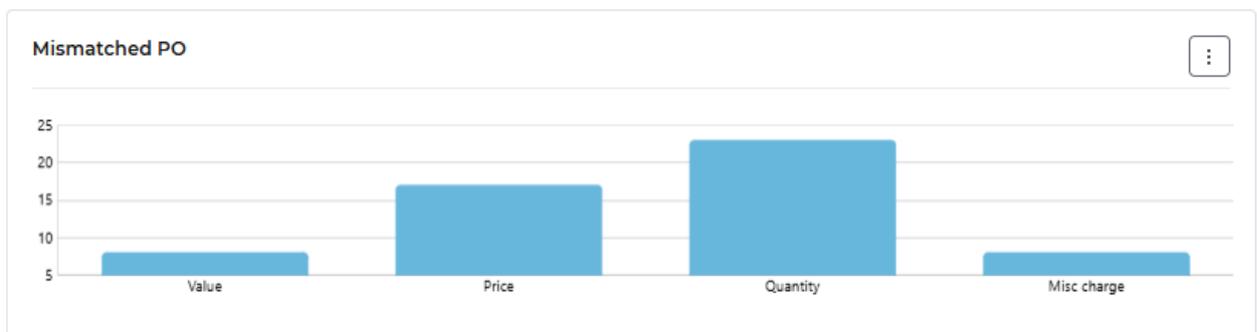
**Price**

**Quantity**

**Miscellaneous Charge**

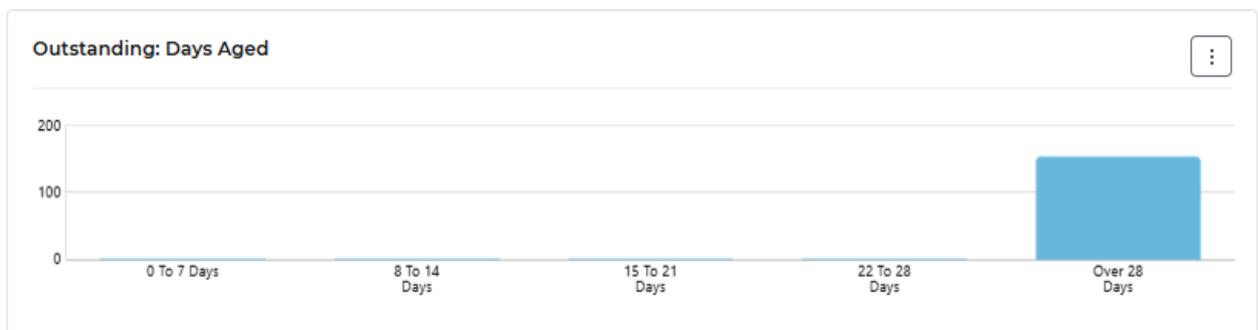
For more information on mismatches use the following link.

<https://financials.helpdocs.io/article/o20gh0vf4t-mismatch-types>



## Outstanding: Days Aged

Displays outstanding aged transactions by days, this is invoices and credit notes.



## Status

Displays transactions with the different statuses.

**Accept** - ready to be paid but not yet reached the due date

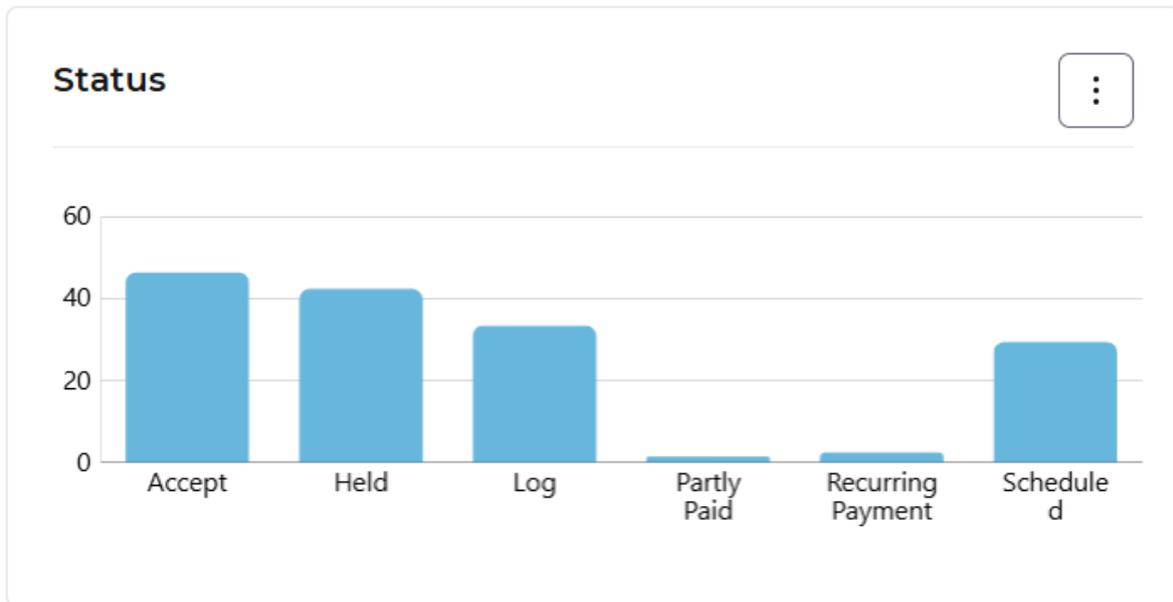
**Held** - due to a mismatch to a purchase order or goods received note

**Log** - requires the line details to be added

**Partly Paid** - invoice has been part paid but still has an outstanding balance

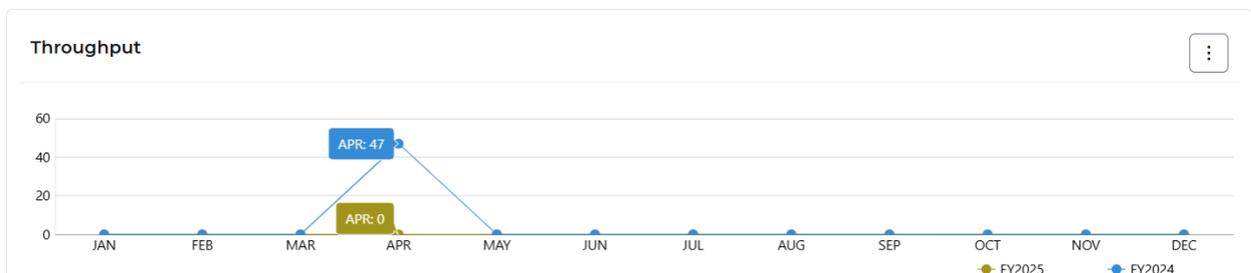
**Recurring Payment** - invoice has been setup with recurring payment schedule

**Scheduled** - the invoice is currently on a payment schedule



## Throughput

Displays how many transactions have been posted that month. This is just a summary view with the drilldown action is not available.



## Processing

### Awaiting Action graph

When selecting a bar on the graph a list of transactions is then displayed, depending on the transaction status will depend on what action is available.

If you are using foreign currency a summary will be shown above the transaction list.

**Invoices List** Export All

Summary / Invoices List

Filters

Show User Invoice Only

Currency	Total Count	Total Value	Non PO Count	Non PO value	PO Count	PO Value
SHU	2	519.60	2	519.60	0	0.00
EUR	1	131.54	1	131.54	0	0.00
GBP	71	42635.77	71	42635.77	0	0.00

Invoices List

Search: Type to search... Select Date... Clear

You can select the **Show User Invoice Only** action, this will only show invoices that have been Assigned to you.

Procurement

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Help Guides Quick Search Help Contact Company CAROLINE.BUCKLAND@ONEADVANCED.COM

**Invoices List** Show User Invoice Only

Search: Type to search... Select Date... Clear

Toggle Column

All	Invoice No	Order	Invoice Date	Due Date	Overdue Status	Supplier	Value
<input type="checkbox"/>	<a href="#">18222</a>	<a href="#">AQ01035</a>	14-Jul-2022	13-Aug-2022	OVERDUE	ACME Supplies	120.00
<input type="checkbox"/>	<a href="#">178787</a>	<a href="#">AQ01009</a>	28-Mar-2023	27-Apr-2023	OVERDUE	ACME Supplies	2.40
<input type="checkbox"/>	<a href="#">1898333</a>	<a href="#">AQ01116</a>	16-May-2023	15-Jun-2023	OVERDUE	ACME Supplies	60859.20
<input type="checkbox"/>	<a href="#">55</a>	<a href="#">AQ01116</a>	16-May-2023	15-Jun-2023	OVERDUE	ACME Supplies	30430.20
<input type="checkbox"/>	<a href="#">PTRECON</a>	<a href="#">P9887</a>	06-Jun-2023	06-Jul-2023	OVERDUE	ACME Supplies	240.00
<input type="checkbox"/>	<a href="#">54545</a>	<a href="#">P88744</a>	07-Jun-2023	07-Jul-2023	OVERDUE	ACME Supplies	240.00
<input type="checkbox"/>	<a href="#">C2C111</a>	<a href="#">AQ01119</a>	09-Jun-2023	09-Jul-2023	OVERDUE	ACME Supplies	60859.20
<input type="checkbox"/>	<a href="#">1A</a>	<a href="#">PQ01175</a>	12-Jul-2023	11-Aug-2023	OVERDUE	ACME Supplies	289.15

The number of rows per page can be changed by selecting the drop-down menu. The **Previous Batch** and **Next Batch** options alongside the page numbers can also be selected. Selecting **Next Batch** will increase the number of transactions, if the buttons are unavailable then all transactions have been retrieved. The list is built by 100 each time the Next Batch button is selected.

Showing rows 1-25 of 100 Rows per page  < 1 2 3 4 >

**Invoices List**

<input type="checkbox"/> All	Invoice No	Order	Invoice Date	Due Date	Entered Date	Overdue Status	Dispute	Supplier	Curr	Internal Ref
<input type="checkbox"/>	<a href="#">LOGOLO1</a>		15-Mar-2021	14-Apr-2021	15-Mar-2022	OVERDUE		ACME Supplies	GBP	233
<input type="checkbox"/>	<a href="#">7878787</a>		03-Mar-2022	02-Apr-2022	03-Mar-2022	OVERDUE		ACME Supplies	GBP	220
<input type="checkbox"/>	<a href="#">165321</a>		14-Mar-2022	13-Apr-2022	14-Mar-2022	OVERDUE		ACME Supplies	GBP	232
<input type="checkbox"/>	<a href="#">CLOG1</a>		16-Aug-2022	15-Sep-2022	16-Aug-2022	OVERDUE		ACME Supplies	GBP	293

The **Search** field can also be used at the top of the list, with the option of selecting dates.

**Invoices List**  Show User Invoice Only

<input type="checkbox"/> All	Invoice No	Order	Invoice Date	Due Date	Overdue Status	Supplier
<input type="checkbox"/>	<a href="#">76545</a>		26-Nov-2024	26-Dec-2024	OVERDUE	ACME Supplies

Showing rows 1-1 of 1 Rows per page  < 1 >

Scroll to the right of the list to locate the **Actions**, select the 3 dots to see which actions are available.

Invoice Owner	Actions
	<input type="button" value="⋮"/>
<input type="button" value="View Invoice"/>	

When selecting the **View invoice** action, this will show you the summary of the Invoice header and lines.

**Procurement** | FINANCIALS DEMO | Help Guides | Quick Search | Help | Contact | Company | CAROLINE.BUCKLAND@ONEADVANCED.COM

### Invoice Summary : 1A

Db Archive | Paperclip

Summary / Invoices List / Invoice Summary

Header | Lines

**To**

Supplier: ACME Supplies

Supplier Code: A00001

Phone: 01203 128876

Fax:

BSB: 112233

Account: 34343434

Address: P.O. Box 123, Avonmere Rugby, Warwickshire CV21 1EB

**History**

Entered By: CAROLINE.BUCKLAND@ONEADVANCED.COM

Date Entered: 12-Jul-2023

Invoice Issued: 12-Jul-2023

Invoice Received:

Due Date: 11-Aug-2023

Authorisation: [view...](#)

**Summary**

Transaction Reference: 1A

Accounts Payable Reference: 385

Transaction Type: Invoice

Transaction Sub Type: Invoice

Transaction Status: **SCHD**

Authorisation Status: **NOTREQ**

Order Currency: GBP

Total Value: 240.96

Amount Invoiced: 289.15

Invoice images and any paperclip attachments can be viewed by selecting the **DB Archive** and **Paperclip** buttons.



The breadcrumb trail can be used to go back to the Invoice list.



## Mismatched PO

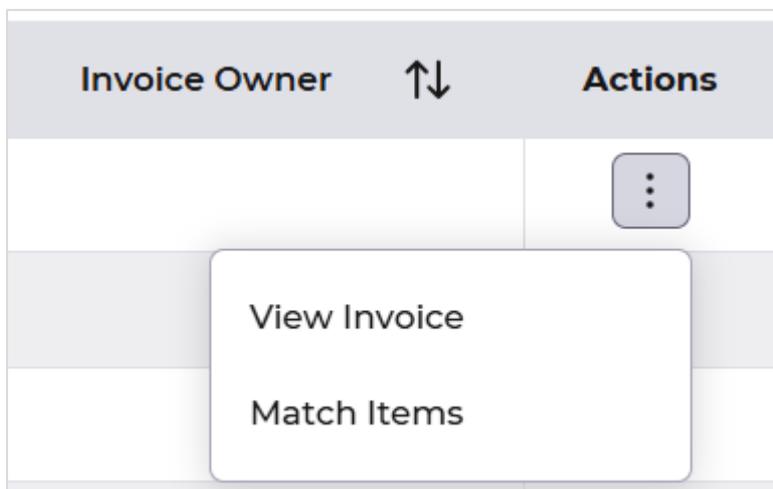
There are four types of mismatches.

*Note: more details for the mismatch types can be found here:*

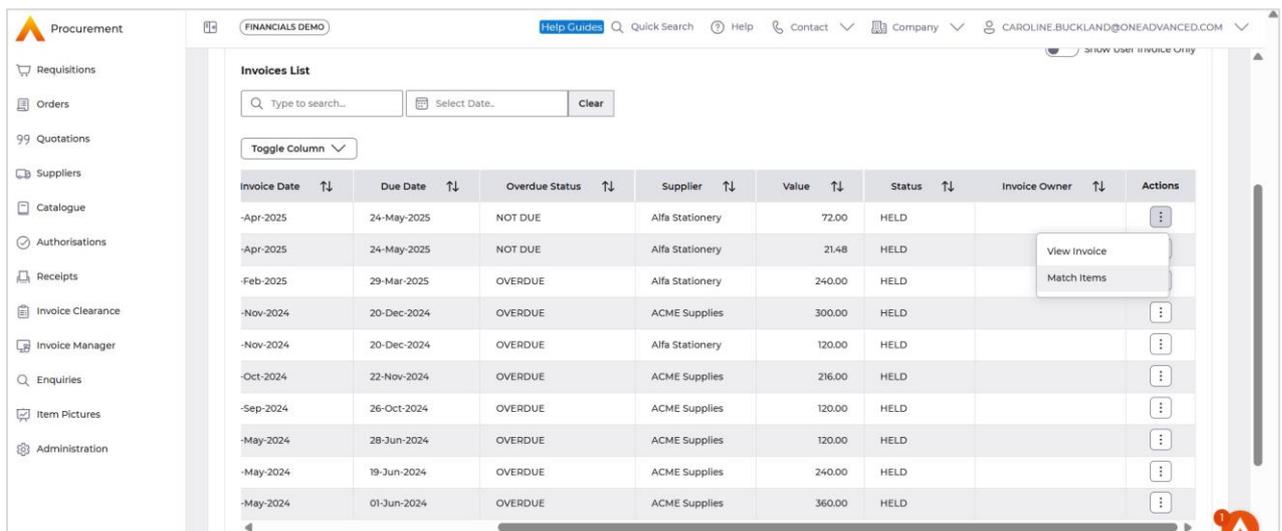
<https://financials.helpdocs.io/article/o20gh0vf4t-mismatch-types>

- Value
- Price
- Quantity
- Miscellaneous Charge

Select one of the tiles to locate a list of invoices. When selecting the **Actions** menu two options will be available.



Select the **Match items** action.



You are taken to the Matching screen, where the mismatch can be resolved. Each link will take you to the appropriate screen to resolve the mismatch.

**Invoice Clearance Items**

[Summary](#) / [Invoices List](#) / Invoice Clearance Items

**Invoice Header**

Supplier ACME Supplies	Reference 7335454	Gross Amount 0
Address	Sysref 497	Currency GBP
	Type 1	Transaction Date
	Status	Entry Date

**Invoice Line**

Order	Buyer	Invoice Line	Item	Received Value	Invoice Value	Agreed Value	Financial Impact
AO01030	MARK.SMITH@ONEADVANCED.COM	1	Cleaning	900.00	1000.00	0.00	0.00

For more information on the resolving mismatches select the link below.

<https://financials.helpdocs.io/article/y7kftij29u-invoice-clearance>

## Status

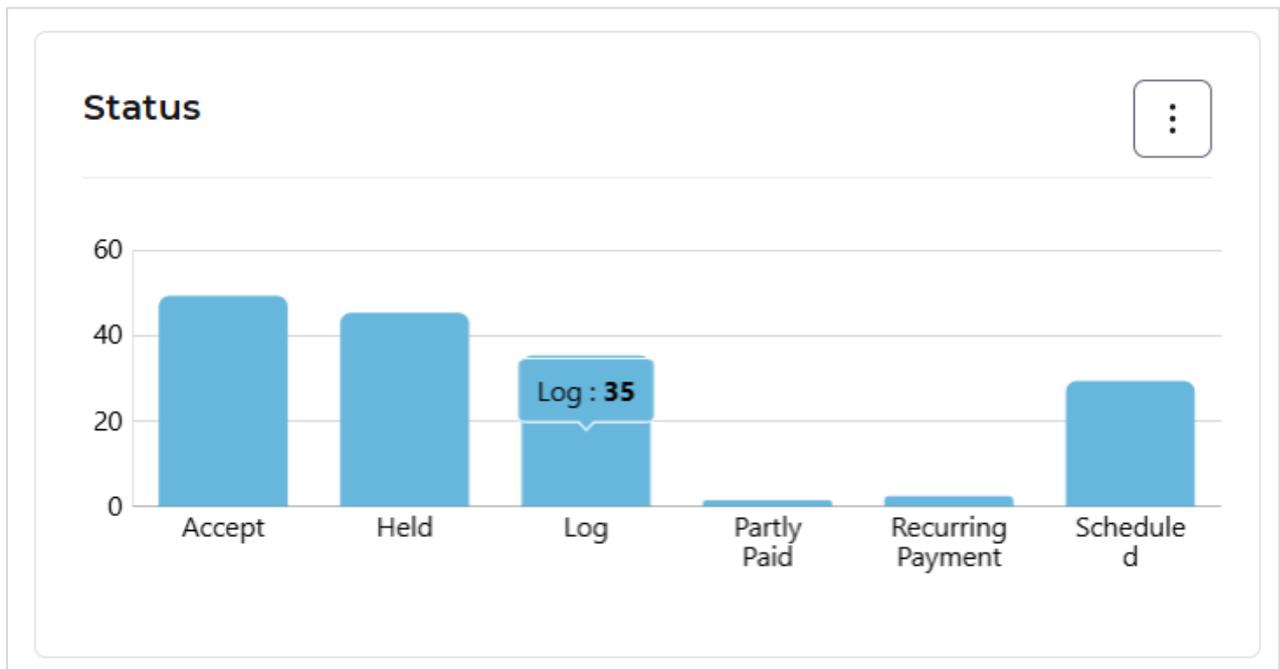
This will display all invoice statuses, these can be viewed by selecting each value.

When a Log status action is selected; this will allow amendment of the invoice and the entry of line details to be added.

## Logged Invoices Processing

### Standalone Invoice

Select the Log Status from the Status graph.



This option will display invoices that are awaiting processing i.e. line details need to be added.

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Summary / Invoices List

Filters

Currency: GBP | Total Count: 100 | Total Value: 94001.61 | Non PO Count: 89 | Non PO value: 8776.50 | PO Count: 11 | PO Value: 6626.11

Show User Invoice Only

Invoice No	Order	Invoice Date	Due Date	Overdue Status	Supplier	Value	Status	Invoice Owner	Actions
<a href="#">1523</a>		16-Oct-2016	15-Jan-2021	OVERDUE	B W Mals & Sons Ltd	1200.00	LOG		[E]
<a href="#">18V6546</a>	<a href="#">E000021</a>	17-Feb-2018	19-Mar-2018	OVERDUE	Ally Stationery	14.40	LOG		[E]
<a href="#">18V6546.1</a>		17-Feb-2018	19-Mar-2018	OVERDUE	Amnert Office Supplies Ltd	298.00	LOG		[E]
<a href="#">18V6546</a>	<a href="#">A000272</a>	17-Feb-2018	05-Dec-2020	OVERDUE	Amnert Office Supplies Ltd	298.00	LOG		[E]
<a href="#">1810</a>		27-Sep-2019	05-Feb-2021	OVERDUE	Amnert Office Supplies Ltd	240.00	LOG		[E]
<a href="#">1877</a>		27-Nov-2019	04-Feb-2021	OVERDUE	Amnert Office Supplies Ltd	240.00	LOG		[E]
<a href="#">1T108654</a>		01-Jan-2020	31-Mar-2020	OVERDUE	Purple Telecoms	189.36	LOG		[E]
<a href="#">1T108654</a>		01-Jan-2020	31-Mar-2020	OVERDUE	Purple Telecoms	189.36	LOG		[E]
<a href="#">1T108654</a>		01-Jan-2020	31-Mar-2020	OVERDUE	Purple Telecoms	189.36	LOG		[E]
<a href="#">1T108654</a>		01-Jan-2020	31-Mar-2020	OVERDUE	Purple Telecoms	189.36	LOG		[E]

Showing rows 1/10 of 100 | Rows per page: 10 | [Previous Batch] [Next Batch]

Remember the list can be refined by the filters and then selecting the **Search** button.

Once the list is retrieved you can select the Invoice number hyperlink to view more details.

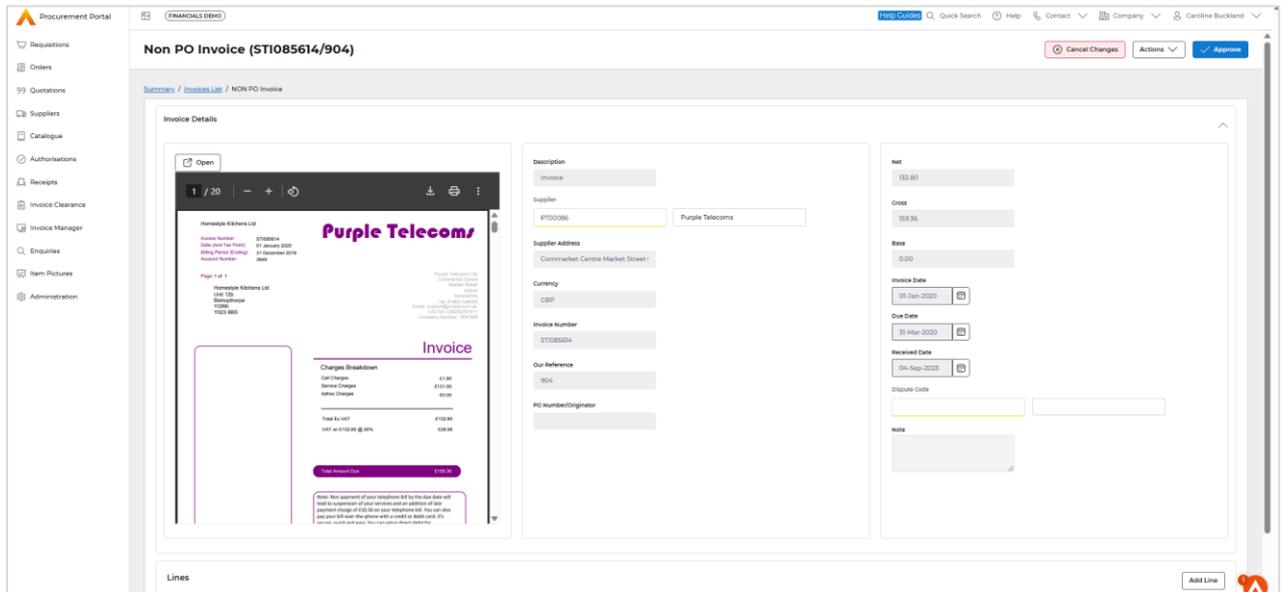
All	Invoice No	Order	Invoice Date	Due Date	Overdue Status	Supplier	Value	Status	Invoice Owner	Actions
<input type="checkbox"/>	<a href="#">ST1085614</a>		01-Jan-2020	31-Mar-2020	OVERDUE	Purple Telecoms	159.36	LOG		

To go back to the invoice list, select the hyperlink for Invoices List.

There are action buttons to the right of the screen that allows the **View Invoice** or **Amend Invoice** action.

Use the **Amend** action.

The Invoice/Credit note is displayed alongside the header information. The header data of the invoice is shown on the right side of the screen - this should be checked for accuracy prior to adding any additional lines.



When the invoice details have been verified, line details can be added, select the **Add Line** button.



You are required to enter the following fields. You can search for codes by typing the code or description.

- GL Account
- Invoice Price
- Invoice Quantity
- Vat Code
- Line description

A financial code will need to be entered onto the screen in the coding line at the bottom.

The cost centre and account codes are mandatory and need to be entered in every case. Analysis codes are not always required but should be entered if required.

To enter the cost centre, if the code is known it can be manually entered in the cost centre box.

Lines

#1	Cost Centre	Nominal	Fund	Project	Week	Emp	Proj	Phase	Act	Sub
	2105	5404	X	X  X						
	Finance	Telecommunicat	Default	Default						

Once the code is entered, the net amount box will need to be entered, If the whole value of the invoice is to be coded to the same financial code, enter the full value in this box – the Net Amount is shown on the invoice header details above. Quantity's can also be entered.

Where the invoice value is to be split across more than 1 code, enter the value to be allocated to the entered code in the Net Amount field, another row can then be added.

An invoice can contain as many coding rows as required.

Next the VAT code needs to be entered. Please enter this in the VAT code box – a drop-down menu will show the code.

A line description requires and entry.

Invoice Price	Quantity	Net Amount	VAT Code	VAT Amount	Line Description
132	0.0000	132.00	STD	26.40	Call Charges
			Standard		

You have two icons available against each line.

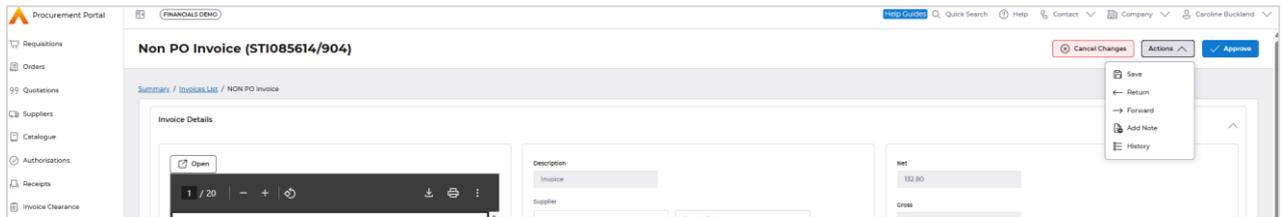


**Copy** – to copy the line.

**Delete** to – delete the line.

The **Add Line** action can also be used.

The **Action** button at the top right of the screen allows the following actions.



**Save** – will update your transaction and send for approval if applicable.

**Return** – this can be returned to a user or team if this has been sent to you in error, comments can be added. The select the **Return** button.

### Return ✕

**Owner**

OR

**Team**

**Notes**

This does not belong to me

You have 174 of 200 characters remaining

The **Cancel Changes** button can then be used to return to the invoice list.



**Forward** - on to another user or team, notes can also be added. The select the **Forward** button.

### Forward ✕

**Owner**

TRAINS

Cloud Financials Trainee 8

OR

**Team**

**Notes**

Please enter the line details |

You have 170 of 200 characters remaining

Cancel

Forward

**Add notes** – enter the notes and then select the **Add** button.

### Add Notes ✕

**Comment**

Please check the coding is correct before you authorise

You have 145 of 200 characters remaining

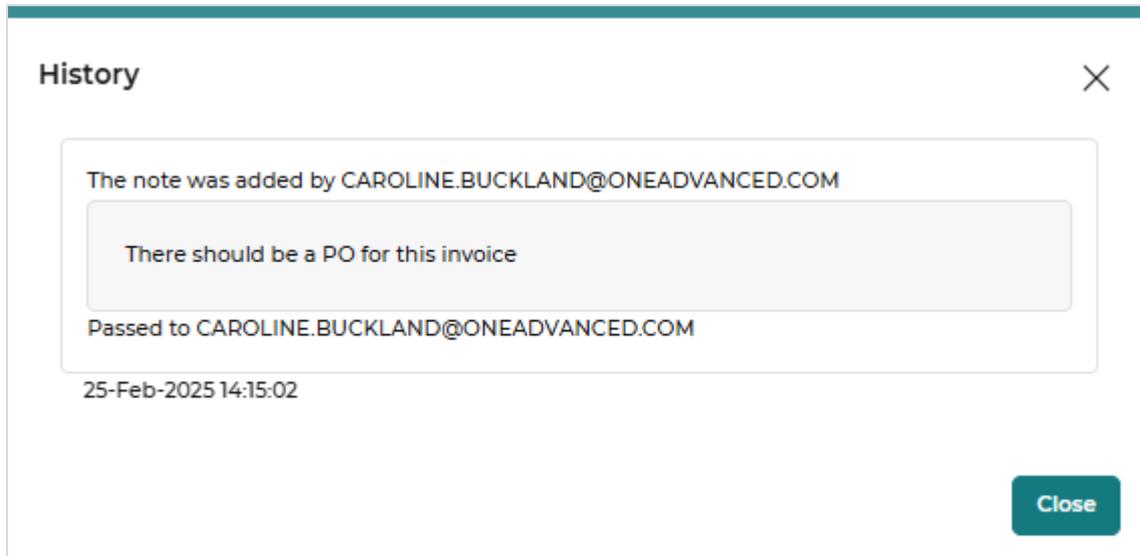
Cancel

Add

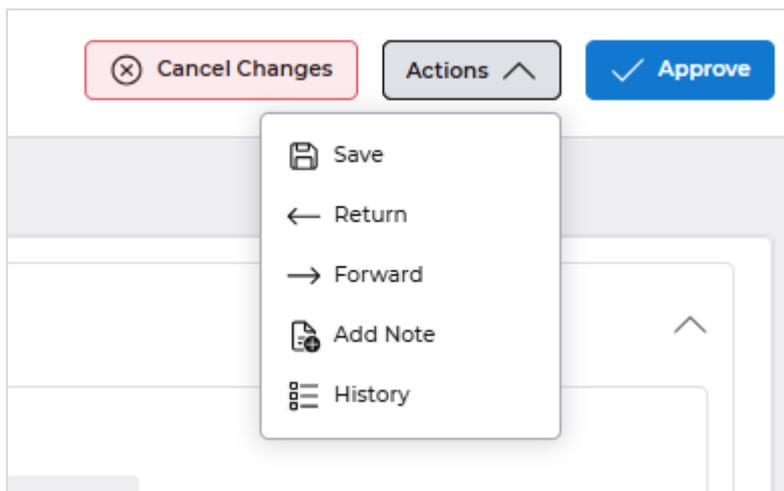
The message is retrieved, and the invoice is saved. This will be sent for authorisation if applicable.



**History** – when an invoice has been forwarded or returned to you, this will show all comments added including users, dates and times



There is also a **Cancel Changes** button and an **Approve** button available from this screen.



**Cancel Changes** – will not save any data added and will return you back to the transaction list.

**Approve** - will update the invoice and you will receive an update message. The invoice may require authorisation before it will be paid.



## Dispute codes

Can be entered, if you want to query the invoice. These are pre-defined codes and can be used as a search criterion from the filters option.

When you are in the Amend mode, the header details will display a Dispute Code field.

**Supplier Address**

**Currency**  
GBP

**Invoice Number**  
INV6577

**Our Reference**  
115

**PO Number/Originator**

**Base**  
0.00

**Invoice Date**  
17-Feb-2020

**Due Date**  
18-Mar-2020

**Received Date**  
30-Mar-2020

**Dispute Code**  
incorrect

D1C  
incorrect coding  
Showing 1 of 1 result(s)

Additionally, add more notes if required by adding the notes – explained in the early section.

**Save** – save any changes made, this will keep you in the same screen.

The Filter will allow the search for dispute codes.

**Filters**

Supplier: \_\_\_\_\_

Status: Log

Transaction Type: All

Owner: \_\_\_\_\_

PO number: \_\_\_\_\_

Team: \_\_\_\_\_

Dispute Code: D1C

Mismatch Code: Select Mismatch Code

Invoice Date: Select Date

Due Date: Select Date

Reset Search

**Invoices List**

Show User Invoice Only

Type to search... Select Date... Clear

Toggle Column

All	Invoice No	Order	Invoice Date	Due Date	Overdue Status	Supplier	Value	Status	Invoice Owner	Actions
<input type="checkbox"/>	19867		22-Mar-2021	21-Apr-2021	OVERDUE	ACME Supplies	240.00	LOG	VAW	⋮
<input type="checkbox"/>	1905251		19-May-2025	18-Jun-2025	NOT DUE	ACME Supplies	240.00	LOG	ADVCB	⋮

To remove a Dispute code, amend the invoice and remove the code.

*Note: dispute codes are for memorandum only, they will not stop the invoice being processed.*

## Order Related Invoice

If the invoice is order related the order number will be displayed in the list.

**Invoices List**

Toggle Column ▾

<input type="checkbox"/> All	Invoice No ↑↓	Order ↑↓	Invoice Date ↑↓	Due Date ↑↓	Overdue Status ↑↓	Supplier ↑↓	Value ↑↓	Stat
<input type="checkbox"/>	<a href="#">190525344122</a>	<a href="#">010614</a>	19-May-2025	19-May-2025	DUE	Sagar	120.00	LOG

Use the **Amend Invoice** action.

Invoice Owner ↑↓	Actions
ADVCB	⋮
	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <p>View Invoice</p> <p>Amend Invoice</p> </div>

The order lines are retrieved.

**Lines**

Line ⚙	Item code ⚙	Description ⚙	Ordered ⚙	Received ⚙	UOM ⚙	Unit Price
1		Dell Laptop	1.0000	1.0000	EA	200.00

Showing rows 1-1 of 1 Rows per page 10 ▾

< 1 >

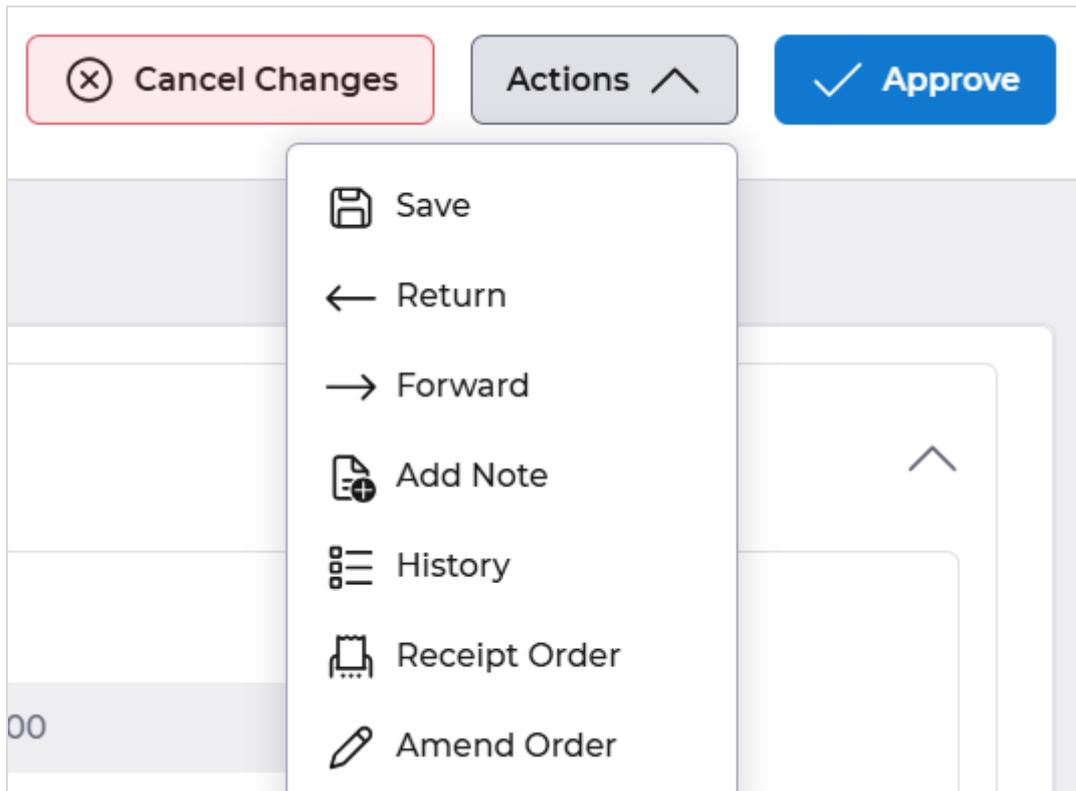
Check the information is correct, if the lines have correctly matched the **Approve** button can be used to process the invoice/credit note.



## Receipt Order

If the invoice has a mismatch, this could be because of a price, value or not enough receipts are available to match, then the actions button will display two more options.

- Receipt Order
- Amend Order



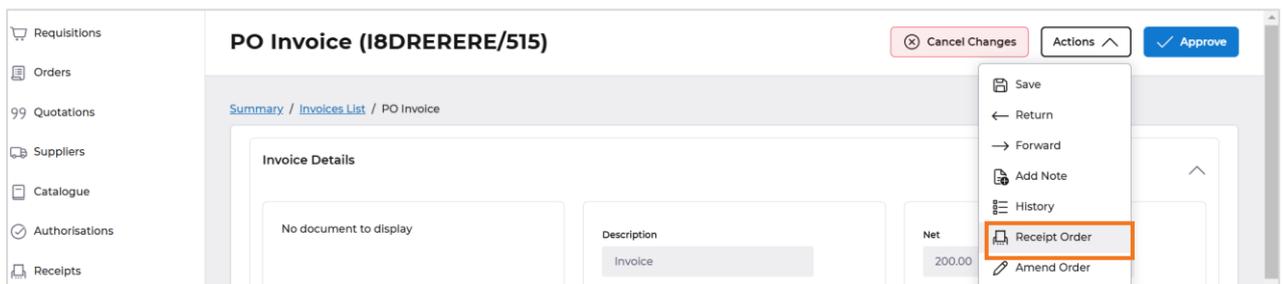
In the invoice has missing Goods Received the notes, as shown below, select the **Receipt Order** option.

Lines

Line	Item code	Description	Ordered	Received	UOM	Unit Price	Net Amount
1		Oxford note books	10.0000	0.0000	-	10.00000	100.00

Showing rows 1-1 of 1 Rows per page 10

## Receipt Order.



This will take you to the Goods Receiving screen. Enter the correct quantity and then select the **Receive Order Line** button.

**Order Details** ⓘ

Order Reference: 010614

Order Currency: GBP - Great Britain Pounds

**Supplier Details**

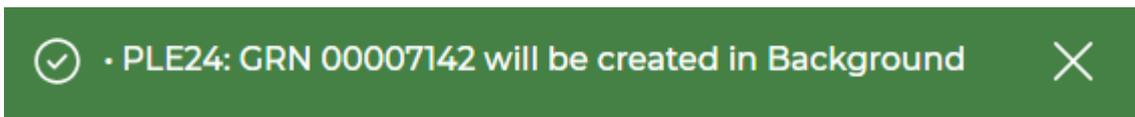
Supplier: SAGAR - Sagar  
Subhanpura,  
dfwewe,  
390025

**Enter Receiving Information**

Advice Note:       Delivery Note:       Received Date: 19-May-2025

#1	Item	Description	O/S Qty	O/S Value	Qty Received	Value Received	Units	Value on Order	Delivery Comment
		Oxford nc	10.0000	120.00	10.0000		EACH	0.00	<input type="text"/>

You will be taken back to the Invoice **Manager Workbench**. A message will be retrieved.



If you access the invoice again in **Amend** mode, the Quantity field will be updated.

Lines

Line	Item code	Description	Ordered	Received	UOM	Unit Price	Net Amount
1		Oxford note books	10.0000	10.0000	EACH	10.00000	100.00

Showing rows 1-1 of 1    Rows per page: 10

The **Approve** action can be selected. The receipts and invoice will be allocated overnight.



The mismatch process can also be run from the AP Reports menu in Financials.



Once the process has been completed the invoice will be ready to be paid on the due date.

## Amend Order action

The **Amend the Order** action can be used, access the lines format to make the changes.

If the Header and Lines values do not match – the **Amend Order** action can be used.

The screenshot shows the 'PO Invoice (I8DRERERE/515)' interface. On the left is a navigation menu with items like Requisitions, Orders, Quotations, Suppliers, Catalogue, Authorisations, and Receipts. The main area displays 'Invoice Details' with a 'No document to display' message. A dropdown menu is open over the 'Actions' button, listing options: Save, Return, Forward, Add Note, History, Receipt Order, and Amend Order. The 'Amend Order' option is highlighted with a red box.

*Note: the line has been received the invoice price cannot be changed.*

The 'Invoice Details' section is shown in detail. It includes a 'No document to display' message on the left. The right side contains several fields: Description (Invoice), Supplier (SAGAR), Supplier Address (Subhanpura dfweve 390025), Currency (GBP), Invoice Number (14465656), Net (200.00), Gross (240.00), Base (200.00), Invoice Date (19-May-2025), Due Date (19-May-2025), and Received Date (19-May-2025).

### Lines

Line	Item code	Description	Ordered	Received	UOM	Unit Price	Net Amount
1		Oxford note books	10.0000	10.0000	EACH	10.00000	100.00

Showing rows 1-1 of 1 Rows per page 10

Amend the price and **Submit Order Amendment**.

The screenshot shows the 'Amend Order : 010616' interface. At the top, there are 'Paperclip' and 'Add Line' buttons. Below is a breadcrumb trail: Summary / Invoices List / PO Invoice / Order Basket. The main area has tabs for 'Header' and 'Lines'. Under the 'Lines' tab, there is a table with one row: '1) Oxford note books' with a status of 'Outstanding'. The table has columns for Quantity (10.0000), Price (20), and Item Value (200.00). Below the table, the 'Order Total : 200.00' is displayed. At the bottom, there are buttons for 'Clear Basket', 'Save As Draft', 'Line Override', and 'Submit Order Amendment'.

The message will be retrieved. Your order may require authorisation.

✕

✔
Order 010616 has been amended successfully. Your Workbench list will not update immediately. After a few moments click the browser refresh button to update your orders.

Go back to the Invoice and use the **Amend Invoice** action.

The lines will have been updated.

Lines

↑↓	Description ↑↓	Ordered ↑↓	Receipted ↑↓	UOM ↑↓	Unit Price ↑↓	Net Amount ↑↓
	Oxford note books	10.0000	0.0000	-	20.00000	200.00

Showing rows 1-1 of 1   Rows per page    < 1 >

The approve button can then be selected.



*Note: some invoices may have an order amendment and receipt discrepancy, after each amend go back to Amend the invoice until all actions are complete.*