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Invoice Setup Options for Document Approval

Settings > Document Approval > General Options > Approval Sources > Invoice > Edit

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Use Invoice Approval: Activates the use of approvals with AP Invoices.

Automatically delegate invoice to creator/reviewer of associated PO: If an Invoice is applied to a purchase order, the PO creator is automatically assigned as the invoice's reviewer. A notification email is distributed to the reviewer immediately upon the invoice being saved.

Require "Send to Reviewer" comment: Optional setting for the required comment.

Auto-post once approved: Controls if Invoices are automatically posted upon final approval.

Show PO log on invoice print: When Purchase Orders are used, this option will append the PO approval log to the invoice detail print.

Allow existing distribution line GL accounts to be changed after final approval: This option allows users with sufficient permissions to modify existing GL distribution line accounts. New distribution lines may not be added, and amounts may not be changed.

Allow reviewers to change:

- **All invoice information:** Changes may be made to any invoice information (Header: vendor ID, date, due date, etc., GL distributions: GL accounts, amounts, comments, etc.)
- **All invoice information except total invoice amount:** Changes may be made to the invoice header and GL distribution information, but not the total invoice amount. If an invoice’s total amount does not match the amount when the invoice was assigned to the Reviewer, changes may not be saved, and the invoice may not be submitted.
- **Only GL distribution accounts and amounts:** Changes may be made only to GL distributions (accounts, amounts, comments, etc.). All other fields are locked for entry.
- **Only GL distribution accounts and amounts but not total invoice amount:** Changes may be made only to GL distributions (accounts, amounts, comments, etc.). All other fields are locked for entry. If an invoice’s total amount does not match the amount when the invoice was assigned to the Reviewer, changes may not be saved, and the invoice may not be submitted.

System Notifications

Notify submit user:

- **When invoice disapproved:** A notification is sent to the submitter when an Invoice is disapproved. The notification email contains the reason provided for disapproval.
- **When invoice fully approved:** A notification is sent to the submitter when an Invoice is fully approved.
- **When invoice is deleted:** A notification is sent to the submitter when an Invoice is deleted, regardless of the Invoice's approval status.
- **When invoice paid:** A notification is sent to the submitter when an Invoice has a payment issued.

Notify "waiting on" user when invoice payment card information changes: Should an invoice's payment card/vendor information change while an invoice is awaiting approval, the current 'waiting on' user will be notified via email.

Notify administrator when submitted is only approver and invoice is auto-approved: If the final approval table created for an Invoice contains only the submitter, it is auto-approved. When this happens, a notification is sent to the system administrator(s).

Notify user(s) when invoice ready to be posted (comma separated): A notification is sent to the specified email addresses when an Invoice is eligible to be posted.

Include attachment(s) with all system notifications: All system notifications described above will include the Invoice attachments.