# d.velop invoices invoice monitor: Apply

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# 1. d.velop invoices invoice monitor: Apply

## 1.1. Basic information about the application and the documentation

This chapter contains product notes and general information.

### 1.1.1. About the d.velop invoices invoice monitor:

The d.velop invoices invoice monitor is the central collection point for all incoming invoices. The invoice monitor provides users with a starting point for the verification and release workflow – regardless of which role users play in the processing of incoming invoices. The invoice monitor facilitates efficient processing of invoices. At the same time, the app provides authorized users – such as those with the accounting role – with an up-to-date overview of the whereabouts and status of all invoices.

The invoice monitor comprises the following functions:

- Simple navigation via quick accesses:
  - Own open invoices
  - Invoices by delegation
  - All open invoices (where authorized)
  - Archive (where authorized)
- Powerful filter options: Perform targeted invoice searches with filter operators and logical links.
- Accurate grouping: Group invoices according to different criteria to improve the overall structuring.
- Efficient processing of your workflows:
  - You can process invoices one after the other for maximum efficiency.
  - Your individual filters, sorting and groupings are all taken into account.
- Quick actions: Use the preview for invoice documents or other actions without opening the actual workflow.

## 1.2. Getting started

The d.velop invoices invoice monitor provides you with a range of useful functions for your day-to-day processing of incoming invoices. The information contained in the following chapters will assist you in working with the invoice monitor.

### 1.2.1. Opening the d.velop invoices invoice monitor

You can access the invoice monitor via the start page of d.velop documents. The start page of d.velop documents serves as your personal dashboard for organizing your applications and functions.

You can add the invoice monitor to your dashboard as a widget, thus allowing you to access it quickly and easily at any time.

**This is how it works**

1. Open the start page of d.velop documents.
2. Click **Add widget**.
3. Search for the **Invoice monitor** widget and click **Add**.

You can now access the invoice monitor via this widget.

### 1.2.2. Useful information about the navigation pane

The invoice monitor features a navigation pane with various standard views.

## My open invoices

The **My open invoices** view shows all invoices for which an active workflow exists in d.velop smart invoice and which are currently assigned to you directly or based on your membership in a user group.

## Invoices by delegation

The **Invoices by delegation** view shows all invoices for which an active workflow exists in d.velop smart invoice and which are assigned directly to a user for whom you are currently deputizing.

> **Note**
>
> You can only view workflows for invoices that are personally addressed to the user for whom you are deputizing. You cannot view workflows for invoices that were assigned to a user for whom you are deputizing on the basis of their group membership. The deputization of the absent user is given implicitly by the other members of the user group.

## All open invoices

Depending on your specific authorizations, the **All open invoices** view shows all invoices, or all invoices from specific clients, for which an active workflow exists in d.velop smart invoice.

You only have access to this view if you have been granted the necessary authorizations. If you require access to this view, please contact your administrator.

## Archive

Depending on your specific authorizations, the **Archive** view shows all invoices, or all invoices from specific clients, for which a completed or canceled workflow exists in d.velop smart invoice.

> **Note**
>
> The archive contains all invoices of the last six months from the invoice date. You can extend this period to twelve months by clicking opening the list menu and activating the **Extended list** option.

You only have access to this view if you have been granted the necessary authorizations. If you require access to this view, please contact your administrator.

## 1.2.3. Sorting, filtering and grouping

The invoice monitor allows you to sort and filter a wide range of information. For example, you can:

- Sort invoices according to the invoice date
- Sort invoices according to the discount amount
- Filter invoices by a specific invoice number
- Filter invoices with a net due date in the next seven days

The invoice monitor also allows you to group your invoices according to specific properties. For example, you can:

- Group your invoices according to the current workflow step or client
- Combine properties and multi-level group hierarchies

## Sorting invoices

You can use most of the columns in the invoice monitor to sort the displayed invoices. For example, you may wish to sort your invoices in descending order according to the amount of discount. This allows you to prioritize invoices with the highest discount.

> **Note**
>
> You can only sort displayed columns. If the required column is currently hidden, you can choose to show it again. For more information, refer to the chapter Adding and removing columns.

**This is how it works**

1. Navigate to the **Cash discount amount** column.
2. Right-click the column header **Cash discount amount** and select **Sort descending** from the context menu.

> **Note**
>
> Not every column can be used to sort your invoices. In most cases, these are columns that can contain more than one value. Examples:
>
> - The **Delivery slips** column can contain multiple delivery slip numbers.
> - The **Assigned** column can contain multiple users or user groups.
>
> Meaningful sorting is not possible in this case.

### Unsorting a sorted column

You can choose to unsort a previously sorted column. Suppose you have sorted the **Current step since** column in ascending order and now want to unsort the column again.

**This is how it works**

1. Navigate to the **Current step since** column.
2. Right-click the column header **Current step since** and select **Clear sort** from the context menu.

> **Note**
>
> Left-clicking a column always has the same effect with regard to the sorting of the invoices:
>
> - Click the column header once to sort the column in ascending order.
> - Click the column header twice to sort the column in descending order.
> - If you click the column header once more, this will unsort the column.

## Filtering invoices

You can use most of the columns in the invoice monitor to filter the displayed invoices. For example, you can focus on the invoices for which the net due date has already passed.

### Using the column filter menus

If the **Net due date** column is currently displayed, you can access the filter options directly in the column.

**This is how it works**

1. Navigate to the **Net due date** column.
2. Click the filter icon ( ) next to the column header **Net due date**.
3. Select the filter option **Before**.
4. Enter today's date.
5. Click **Apply**.

The filter icon (⩸) on the respective column indicates with a blue dot that a filter is active for this column. In addition, a blue dot on the general filter menu (⩸) shows that at least one filter is active.

## Using the general filter menu

If you have hidden the **Net due date** column, you do not have to show the column in order to access the filter options. You can also access the filter options via the general filter menu.

**This is how it works**

1. Click **Open filter menu** (⩸).
2. Optional: Enter **net due date** in the search field to quickly locate the required column.
3. Expand the **Net due date** option.
4. Select the filter option **Before**.
5. Enter today's date.
6. Click **Apply**.

The general filter menu (⩸) indicates with a blue dot that at least one filter is active.

## Resetting active filters

You can reset active or currently applied filters. Suppose you have applied a filter to the **Net due date** column and would now like to remove the active filter.

If the **Net due date** column is currently displayed, you can access the filter options directly in the column.

**Resetting using the column filter menu – this is how it works**

1. Navigate to the **Net due date** column.
2. Click the filter icon (⩸) next to the column header **Net due date**.
3. Click **Reset**.

The blue dot on the filter icon for the column (⩸) disappears, thereby indicating that no filter is active for this column. The blue dot on the general filter menu also disappears, provided that no other filter is active.

If you have hidden the **Net due date** column, you can access the filter options via the general filter menu.

**Resetting using the general filter menu – this is how it works**

1. Click **Open filter menu** (⩸).
2. Optional: Enter **net due date** in the search field to quickly locate the required column.
3. Expand the **Net due date** option.
4. Click **Reset**.

The blue dot on the general filter menu (⩸) disappears if no other filter is active.

# Grouping invoices

You can use some of the columns in the invoice monitor to group invoices. There are different ways of doing this.

## Grouping via drag and drop

You can simply drag and drop columns to the grouping bar to perform a grouping.

**This is how it works**

1. Click the column header of the required column and keep the mouse button depressed.
2. Drag the column to the grouping bar above the column header and then release the mouse button.

> **Note**
> If you want to use multiple groupings, you can insert a column at any point in the created group hierarchy.
>
> Drag the relevant column to the desired location in the existing group hierarchy in the grouping bar.

### Grouping via the context menu for a column

You can also use the column context menu to group columns.

**This is how it works**

1. Right-click the column header of the required column to open the context menu.
2. Choose **Group by <column header>** in the context menu.

### Grouping via the column menu

You can also group columns using the column menu.

**This is how it works**

1. Click **Open columns menu** ().
2. Click the icon with the two horizontal lines ( ) next to the column header and keep the mouse button depressed.
3. Drag the column to the **Row groups** area and then release the mouse button.

> **Note**
> If you want to use multiple groupings, you can insert a column at any point in the created group hierarchy.
>
> Drag the relevant column to the desired location in the existing group hierarchy in the grouping bar.

## 1.2.4. Changing the quick accesses

You can customize the quick accesses to suit different purposes.

> **Note**
> **Example**
>
> The information in the **Assigned** column is not normally required in the quick access **My open invoices** since this information is obvious. Therefore, you can hide this information in the quick access **My open invoices**. In the quick access **All open invoices**, however, the information from the **Assigned** column is important since the accounting department generally uses this quick access to gain an overview of which users a particular invoice is assigned to.

When you make changes to a quick access, theChanged label appears on this quick access. You then have to save your changes. As long as you have not saved the changes, you can reset the quick access to the last saved state.

### Saving a changed quick access – this is how it works

1. Place the mouse pointer over the quick access.
2. Click **List menu > Save layout changes**.

### Resetting a changed quick access – this is how it works

1. Place the mouse pointer over the quick access.
2. Click **List menu > Reset changes**.

Instead of using **Reset changes**, you can also select a different quick access in the navigation area or exit the invoice monitor. This will also reset the quick access to the last saved state.

## 1.2.5. Adding and removing columns

When you open the invoice monitor for the first time, it is displayed with the default layout. You can add columns and remove them.

### Adding columns – this is how it works

1. Click the column menu (Ⅲ).
2. Navigate to the column that you wish to add.
3. Activate the check box for the column.

### Removing columns via the column menu – this is how it works

1. Click the column menu (Ⅲ).
2. Navigate to the column that you wish to remove.
3. Deactivate the check box for the column.

### Removing columns via drag and drop – this is how it works

1. Click the header of the column that you wish to remove and keep the mouse button depressed.
2. Drag the column up until an icon with a crossed-out eye appears.
3. Release the mouse button.

## 1.2.6. Moving columns

You can rearrange columns in the invoice monitor.

### Moving a column via drag and drop – this is how it works

1. Click the column header and keep the mouse button depressed.
2. Drag the column to the required position.
3. Release the mouse button.

### Moving a column via the column menu – this is how it works

1. Click the column menu (Ⅲ).
2. Click the icon with the two horizontal lines ( = ) next to the column header and keep the mouse button depressed.
3. Drag the column to the required position.
4. Release the mouse button.

## 1.2.7. Adjusting the column width

You can adjust the width of the columns in the invoice monitor.

### Manually adjusting the width of a column – this is how it works

1. Place the mouse pointer over the column edge to the right of the column header. The mouse pointer changes to an arrow pointing to the left and right.

2. Click and hold the mouse button.
3. Drag the column to the required width and release the mouse button.

### Automatically adapting the width of a column to its contents via double-click – this is how it works

1. Place the mouse pointer over the column edge to the right of the column header. The mouse pointer changes to an arrow pointing to the left and right.
2. Double-click the mouse button.

### Automatically adapting the width of a column to its contents via the context menu – this is how it works

1. Right-click the column header to open the context menu.
2. Click **Autosize this column**.

### Adapting the width of all visible columns to their contents – this is how it works

1. Right-click the column header to open the context menu.
2. Click **Autosize all columns**.

### 1.2.8. Freezing columns

You can freeze columns in the invoice monitor at the left or right edge of the screen so that the columns remain visible when scrolling horizontally. The column that you want to freeze must be visible.

**This is how it works**

1. Right-click the column header to open the context menu.
2. Navigate to **Pin column** and click **Pin left** or **Pin right**.

## 1.3. Additional functions and settings

This section covers additional functions that will assist you in your daily work with the application.

### 1.3.1. Useful information about quick actions

The d.velop invoices invoice monitor offers a range of quick actions, which are pinned to the right edge of the screen. The quick actions allow you access specific functions with just a few clicks, without having to open the verification and release workflow. You can customize the quick actions to suit your requirements.

### 1.3.2. Displaying the invoice document

The **Show document** option ( ) in the quick actions allows you to display the invoice document of a verification and release workflow. You require the necessary authorizations to display this document.

### 1.3.3. Activating clearing mode

If your administrator has configured clearing mode for your verification and release workflow, you can activate clearing mode in the quick actions. Click **Show more actions > Activate clearing mode**.

### 1.3.4. Using the "Cancel waiting for goods receipts" function

If your administrator has configured the **Cancel waiting for goods receipts** function for your verification and release workflow, you can select this function in the quick actions. Click **Show more actions > Cancel waiting for goods receipts**.

## 1.4. Tips and tricks

In this section, you will find further options provided by the application to assist you in your daily work.

### 1.4.1. Sorting by multiple columns

You can sort by multiple columns in the invoice monitor. Suppose you want to highlight invoices with the highest discount amounts that have a discount due date in the near future. To do so, you first sort the invoices in ascending order by the discount due date. Within this sorting, you then sort the invoices in descending order by the discount amount.

**This is how it works**

1. Click **Cash discount due date** to sort in ascending order.
2. Press and hold the **SHIFT** key and click twice on**Cash discount amount** to sort in descending order.

The arrows on the column headers indicate the sorting direction. The numbers represent the column ranking in the multiple sorting operation.

### 1.4.2. Sorting groupings

In the invoice monitor, you can sort by columns that were used to create row groups. Suppose you want to group invoices according to the **Current step** column and sort the groups in descending order.

**This is how it works**

1. Drag and drop the column header **Current step** to the grouping bar above the invoice monitor.
2. Click twice on **Current step** to sort the groups in descending order.

> **Note**
> You can combine the sorting of groups with the sorting according to multiple columns. Note that you have only limited influence over the ranking of the columns used in combination with groups. A group hierarchy defines the sort order. The sort order can only be influenced for columns that are not used in the group hierarchy.

### 1.4.3. Filtering hidden columns

You can filter by hidden columns in the invoice monitor without having to show the columns first. Suppose the **Delivery slips** column is not included in your preferred view of the invoice monitor. However, you need to find a specific invoice and only have the delivery slip number available.

**This is how it works**

1. Open the filter menu (⩸).
2. Search for the **Delivery slips** column and expand the element.
3. Enter the relevant delivery slip number.
4. Click **Apply** to apply the filter. Alternatively, you can also press the **ENTER** key.

Active filters are indicated by a blue dot in the filter menu icon.

## 1.5. Frequently asked questions

In this section, you will find answers to frequently asked questions.

### 1.5.1. Which settings for my list view can be saved?

The d.velop invoices invoice monitor can save certain changes that you have made to the layout of a specific quick access. This allows you to permanently retain your preferred layout.

The following settings are stored when you make and save changes to the layout of a quick access:

- Column visibility
- Column arrangement

- Column width
- Column freezing
- Groupings

## 1.6. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

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