Visma.net Approval

Streamline your company's approval flow

Visma.net Approval is an effective solution for online approval of invoices and expense claims

What is Visma.net Approval?

Visma.net Approval provides increased control and a full overview of all documents that need to be approved. The solution helps businesses work in a more structured manner, which results in a shorter time between receiving and booking an invoice. By automating the process flow, the possibility of human error is eliminated and replaced with a streamlined workflow.

Today, more than 8,000 users are using Visma.net Approval. Currently, the solution supports integrations with Visma.net Financials, Visma.net Expense, Visma Document Centre, Visma Mobile Manager and additional integrations are planned for the near future.

Key benefits

- General ledger
- Simplifies approval workflow
- Tasks can be approved from mobile
- Integrates with ERP solution*
- Promotes a paperless work environment
- Increases control and internal efficiency via:
    - + Instant and scheduled notifications
    - + Automates and monitors approval workflow
    - + Delegate approval rights, i.e. if on vacation
    - + Easily email invoices

*A full overview of integrations can be found here

How does Visma.net Approval work?

Visma.net Approval works by gathering documents in workflow tasks from several Visma applications into one interface. Documents can then be approved anywhere, anytime, from any device and can be assigned as tasks for approval.

When a task is completed it is sent to the next recipient defined in the workflow. If the approver is out of the office, they can define another user as a temporary substitute to take over the approval tasks. This helps avoid pending tasks and keeps the workflow moving.

Document types can be invoices (from Visma Document Centre or Visma.net Financials); or travel expenses (from Visma.net Expense). Documents in the list are sorted based on the task's due date.

Users are notified via email of documents that are pending and waiting for approval. Approvers can either view, edit, change, comment, request a review, forward or simply approve the information within the document. Email notifications and reminders are used to inform users of pending documents that are waiting for approval.

Working with Visma.net Approval

Users of Visma.net Approval will be assigned one of three roles: Approver, System Administrator and System Viewer. See the descriptions of each below.

Approver:
- Approve invoices and expense claims from mobile
- View large documents quickly
- Allocate costs to multiples cost centres
- Receive both instant and scheduled notifications
- Review the approval process
- Access previously approved documents
- Attach supporting information at any time
- Ask for advice from colleagues using the Request Review option
- Transfer responsibility using the Forward option
- Delegate approval rights, i.e. if on holiday
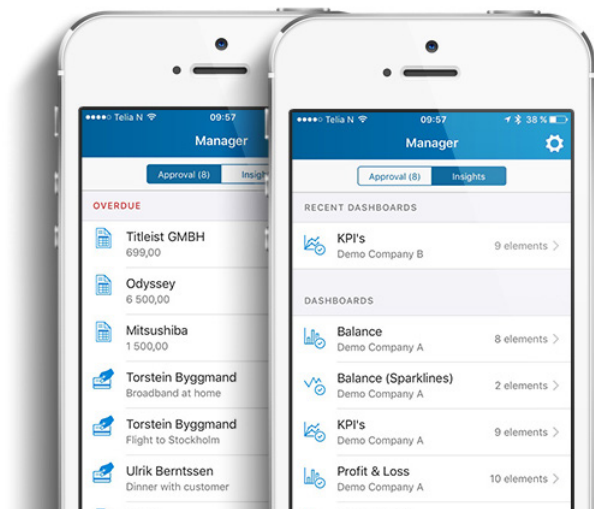- Email invoices
- Retrieve documents for printing

System Administrator:
- Automate approval workflows
- Create different workflows for different document types
- Simulate workflow scenarios
- Model organisation's approval workflow based on responsibilities

- Monitor approval workflows
- Reassign impeded/blocked tasks to available personnel
- View and edit substitutes when users are away
- Receive automatic notifications of blocked workflows

System Viewer:
- Access system configuration, substitutes and approval workflow
- Access to documents, process and company tasks

Visma.net Approval key features

Feature	Description
Fully automated and integrated workflow	Once the document is in approval, the entire approval process is then taken care of by Visma.net Approval.
User roles	Visma.net Approval has three defined user roles: Approver, System Administrator and System Viewer roll.
Workflow support	There are two types of workflows that are supported in Visma.net Approval: • **Sequential workflows** where the document is sent from one recipient to the next recipient in a given order. • **Parallel workflows** where the document is sent to all recipients simultaneously. Workflows can be configured based upon value and duration.
Task operations	The recipient of a document or task has the possibility to either: Approve, Reject, Forward, Request a review, Add lines, Add comments, or Add attachments.
Substitute	Temporary substitutes may be assigned to handle tasks during an absence.
Document viewer	Easily view documents with numerous pages. Zoom in/out, search and print, if necessary.
Mobile Approval	Approve invoices, expense claims and tasks from mobile with the Visma Mobile Manager app.
Approval processes	Create your own approval processes based on organisational responsibility and an amount range for approving.