

Sisukord

PURCHASE INVOICE PROCEEDING 3

Setting up proceeding 3

 Proceeding types 4

 Setting up proceeders 5

Adding proceeders to a purchase invoice 5

Proceeding 5

 Refusal 5

 Removal of signatures 6

Special cases 6

The purchase invoice cannot be confirmed if the required number of proceeders has not been added to it. Saving and confirming the purchase invoice also shows a corresponding message:

The screenshot shows the 'Purchase invoice 102267' form. The 'Supplier' is 10001348 and the 'Supplier name' is Demo OÜ. The 'Suppliers invoice' is OA-76. The 'GENERAL INFO' section is expanded. The 'PROCEEDING' section shows a table with one row: No. 1, Date, User, Proceeder, Proceeder name, Role, Comment, and Actions. The 'DATAFIELDS' section is also visible. Two error messages are displayed in the top right corner:

- Confirming failed**: Proceeding does not have enough users in signer role - currently: 0.00, required: 2
- Unmet proceeding requirements**: Proceeding does not have enough users in signer role. Signers: 0, required: 2

- And/or switch on **100%** (Purchase invoice confirming expects proceeding to be fully signed).

The screenshot shows the '100% Count' settings for the 'Purchase invoice'. The 'Count' is set to 0. The 'Sequential Limit' is also set to 0. The '100%' checkbox is checked. The 'Purchase order' and 'Expense' rows are also visible with their respective counts and limits.

Document	100% Count	Sequential Limit
Purchase invoice	☒ 0	☐ 0
Purchase order	☐ 0	☐ 0
Expense	☐ 0	☐ 0

100%: Document confirming expects proceeding to be fully signed
 Count: Mandatory number of signer role users
 Sequential: Proceeding takes place in sequence according to points given to users. Proceeding can be done in parallel only for users having same amount of points.
 Limit: User based sum limit is in use (document won't confirm unless signed by proceeder having big enough sum limit).

The purchase invoice cannot be confirmed if the proceeder(s) have not signed or have refused to sign.

The screenshot shows the 'Purchase invoice 102267' form. The 'Supplier' is 10001348 and the 'Supplier name' is Demo OÜ. The 'Suppliers invoice' is OA-76. The 'GENERAL INFO' section is expanded. The 'PROCEEDING' section shows a table with two rows: No. 1, Date, User, Proceeder, Proceeder name, Role, Comment, and Actions. The 'DATAFIELDS' section is also visible. A message is displayed in the top right corner:

- Confirming failed**: Document has too few Signatures 0.00 vs 1.00 (Proceeding)

Proceeding types

In Directo, purchase invoices can be processed in three ways:

- **Parallel proceeding** - all proceeders process the invoice and receive notifications at the same time.
- **Sequential proceeding** - proceeding in order of levels: first the proceeders with fewer points (P1) sign, then those with more points (P2), etc. Notifications are sent in the same order. Sequential proceeding requires at least 2 proceeders.
- **Row-based proceeding** - proceeders take a share of the dividable sum on the purchase invoice rows, and the code of the user who has accepted that amount is added to the row. The last signer cannot sign until the difference of the dividable sum is 0.00.

By default, proceeding is parallel. It becomes sequential when the option **Sequential** is ticked (Purchase ledger settings → Purchase invoice proceeding type).

The screenshot shows the 'Sequential Limit' settings for the 'Purchase invoice'. The 'Count' is set to 1. The 'Sequential Limit' is also set to 1. The 'Sequential' checkbox is checked. The 'Purchase order' and 'Expense' rows are also visible with their respective counts and limits.

Document	100% Count	Sequential Limit
Purchase invoice	☐ 1	☒ 1
Purchase order	☐ 0	☐ 0
Expense	☐ 0	☐ 0

100%: Document confirming expects proceeding to be fully signed
 Count: Mandatory number of signer role users
 Sequential: Proceeding takes place in sequence according to points given to users. Proceeding can be done in parallel only for users having same amount of points.
 Limit: User based sum limit is in use (document won't confirm unless signed by proceeder having big enough sum limit).

Purchase invoice proceeding becomes row-based without exception if the setting Purchase invoice proceeding is row based is set to **Yes**.

Setting up proceeders

A proceeder can be any user who has **Points** set on the purchase invoice row in the user or group rights. Points determine the proceeding level. A user without points cannot sign the invoice.

NO	Module	Name	How	Browse	Columns	View	Add	Direct	Change	Delete	Confirm	Attachments	Folders	Print	Points
1	oarve	Purchase invoices	all	All	☒	☒	☒	☒	☒	☒	Confirmed	☒	☐	Yes	1

See also how to set a proceeding [substitute](#) for holidays or give a proceeder [additional rights](#), e.g. to change proceeders or receive notifications about refusals.

Adding proceeders to a purchase invoice

The person entering the purchase invoice can add proceeders manually, or adding proceeders can be automated with the following options:

- **Default proceeders** - on the employee card, you can define the conditions under which a specific employee is added automatically to different documents that go through proceeding.
- **Supplier-based proceeders** - proceeding set on the supplier card is applied automatically to the Purchase invoice, Purchase order and Stock Receipt when a document with that supplier is saved.
- **Proceeding templates** - proceeding templates let you predefine sets of proceeders that can be added to a document in one step, or that are applied automatically based on the object.

Proceeding

The proceeder can review documents in proceeding and add or change their decision:

- directly on the document in the **PROCEEDING** section
- in the **Proceeding** report
- in the **MyDirecto** proceeding solution

Refusal

When refusing, add a comment about the reason for refusal and the necessary changes. In sequential proceeding, a refusal may stop the proceeding order. In that case, after the corrections, the refusal or the signatures must be cancelled. Read more: [Refusal](#).

Removal of signatures

If a field set in the setting Purchase invoice fields which will reset proceeding (signatures removed) upon changing is changed on the invoice, the signatures given are removed and the invoice must go through proceeding again. Read more: [Invalidating proceeding](#).

Special cases

- **Purchase invoice linked to a purchase order** - a purchase invoice created from a purchase order that has already gone through proceeding can be confirmed by the automatic confirmation proceeder if the invoice amount stays within the allowed excess. Read more: [Proceeded purchase orders and purchase invoice not going through proceeding](#).
- **Credit invoices** - proceeding of invoices with a negative amount: [Credit invoice proceeding](#).

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