

Why can't I approve the invoice someone sent to my basket?

Approve an invoice is only possible if it is a NoPO invoice (invoice without PO).

The invoice or credit-note must be coded and reviewed before the approval.

A person can approve an invoice if an approval flow is defined in the approval matrix.

The case is related to a situation when the approver is not able to approve the invoice. It can relate to several reasons and SWIM Support role is to verify and correct the mistake. In Basware Cloud approval is fully automated based on approval matrix. There are two cases when the approver is not able to approve the invoice.

1. SKF Reference field incorrect

a) Verify SKF Reference field in Basware

The first step to be performed related to problems with approving NOPO invoice is to verify Reference person field as it has influence on invoice approval process. Reference person field should be typed with full name or GADD ID of the reviewer of the invoice. The incorrectly filled name, GADD ID or typed name of approver there can cause the problem with the approval process.

⇒ Go to Accounts payable and search invoice



⇒ Open the invoice and find Reference person field

The screenshot shows the Basware Accounts payable invoice details page. At the top, there are navigation tabs: Home, Shop, Tasks, Documents, Invoicing, and Accounts payable. Below the navigation bar, there is a header section with the following information:

- 1,288.80 EUR GROSS | 1,074.00 ET

Below the header, there are several tabs: Discussions, Header data, Related documents, Workflow, Attachments, Invoice lines, and History. The Header data tab is selected. The header data section contains the following fields:

- Organization: SKF FRANCE S.A.
- Invoice type: Invoice
- System Message
- Supplier code *: 31172X, POLYSE
- VAT Reg. No.: 304499072
- Supplier bank BBAN: FR763000303614000200089522
- Reference person: Breillat Agnes
- Invoice number: FA23081228
- Invoice date *
- Currency code *
- Currency Exchange Rate
- Exchange rate (

⇒ Verify if the SKF Reference field is correct

Example of SKF Reference field incorrectly entered:

Verify if the name or number in this field exists in the system.

In case of a full name, verify if it is correctly added (Last name, first name).

Reference field has the following name: Agnes Breillat

Incorrect :

Reference person
Agnes Breillat

 => Correct :

Reference Person
Breillat Agnes

b) Verify who reviewed the invoice

“SKF Reference” is filled with name of the reviewer.

The approver is defined in the approval matrix per amount + cost center.

The person that made a review step cannot be the approver. When this occurs, information must be sent to the user that, due to performed review, step invoice should be sent to another person for approval, or invoice must be sent again to a correct reviewer and then approved by the approver.

2. Issue with the approval rights/matrix

Only Swim Support can check the approval right in the system.

If the approver can't approve the invoice, he should contact Swim Support

Approval Matrix Logic: