

## Budget Holder Tasks: Invoice Control Exceeded

Tasks can be found in the top right corner of the screen:



When you click on the Tick, a list of outstanding tasks will be displayed. This example shows the user has three tasks to action.

An out of tolerance task will be generated where an invoice exceeds the approved order amount by 5% or £500. Differences of over 5% but less than £10 will not be sent for further approval.

Click on the task to view the invoice and associated order.

Budget Holder Approval Invoice Control Exceeded (2)

**Budget Holder Approval Invoice Control Exceeded** x

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**Purchase invoice approval**

**i** The invoice is exceeding the invoice control. Please check and take action.

**Purchase invoice information**

Supplier	EB Sports UK Ltd		
InvoiceNo	INV-0159	OrderNo	8020304
Invoice date	6/29/2021	Total invoice amount	4,468.58
Due date	7/27/2021	To be approved	3,279.82
Transaction number	29062980	VAT amount	655.96
Currency	GBP		

**Workflow log (row 1)**

6/29/2021 2:37 PM Etel Turnbull (ETURNB) - Distributed

(Enter a comment)

Copy

**Image**

**Order lines**

<input type="checkbox"/>	Order line	Currency	Inv. qty.	Inv. amt.	Order qty	Order price	Order amt.	Qty. received	Amt. received	Product	Product description
<input type="checkbox"/>	1	GBP	0.27	3,279.82	1.00	7,962.75	7,962.75	0.97	7,723.87	CONTRACT...	Rugby and Hockey pitch works - LHU Dra...
<input type="checkbox"/>	1	GBP	0.20	444.00	1.00	2,220.00	2,220.00	0.65	1,443.00	GROUNDMA...	3G and Hockey Pitch Maintenance - 4 V...
			Σ	3,723.82							

Show discrepancies only

**Purchase invoice details**

Map	Tax	Currency	Curr. amount	Tax amount	Account	Costs	Project	Asset
	%	GBP	3,279.82	655.96	7802 Contractor	PRCW Estates Capital Works	CW000038 Phase III - Sport Pitches	HCAR0030 Phase III - Sport Facilities
			Σ	3,279.82	655.96			

**Invoice**

Amount invoiced and amount ordered

Description

Rugby and Hockey pitch works - LHU Drainage Scheme

OK

Approve

Reject

Advanced mode

Workflow user log

Get template

Create/edit template

Log book

Export

- An image of the invoice will be displayed along with summary details at the top of the screen.
- The Order lines show the amount of the invoice and the amount of the order.
- To approve the discrepancy, click on Approve.
- Rejecting a discrepancy will send a task back to the original requisitioner to resolve.