



Validations- Outgoing_validations

English

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Outgoing documents

Version: v2.0

Outgoing validations

In this section, you will find a more-in-depth explanation on how outgoing documents are handled in Extractional.

Different states

State	Meaning	Responsible for the action
Received	Document just entered the system and no verification has been done to it	Email automation or user inserting a new document
Verified	Document has been verified by the respective responsible	Typically the project manager
Document sent	Document has been sent to the client	Secretary
Paid	Invoice has been paid by the client	Accounting department
Rejected	Invoice has been refused internally or by the customer	all the above

Specific functionalities about incoming documents

Sending an invoice to the customer

Extractional provides a feature allowing users to easily send an invoice to the respective customer for payment.

Warning

This feature only works when the Smtplib configuration has been correctly set. You can find more information in the following [section](#)

How to send an email to the customer

In order to trigger this action for a specific validation, you will select it in the context for the respective validation. Alternatively, you also have the option to trigger this action by clicking on the `Send to customer` button in the validation preview page.

Note

Only verified validations can be sent to customers!!

Typical workflow

On the following page, you may find typical workflows that have been used by our customers with outgoing documents. These should help you organizational wise on how to take the most advantage of the system, but should not be referred as rules within the system.

Invoice lifecycle for Client Documents

