# Invoice Acknowledgement Process

An Invoice Acknowledger can approve, return, or forward invoices within their approval queue. This role will be only acknowledge invoices with line items over $5,000 on vendors set up with e-invoicing.

## Actions via New Pending Approval E-mail Notification

**NOTE**: You must first set up your E-mail Approval Code in your user profile under **Change Email Approval Code** under **Update Security Settings** section (refer to Profile Settings job aid).

| Step | Task |
|---|---|
| **1.** | Verify all of the information on the invoice. |
| **2.** | Click **Take Action**. |
| **3.** | Select the action to perform in the **Select an Action** section:<br>• Approve<br>• Assign to myself<br>• Reject/Cancel<br>• Return to owner<br>**NOTE**: You cannot edit or make any changes to the invoice. |
| **4.** | Enter a comment in **Comment** (optional). |
| **5.** | Enter your established **E-mail Approval Code**. |
| **6.** | Click **Submit**. |

## Access the Approvals – Invoices Screen

| Step | Task |
|---|---|
| **1.** | Click **Accounts Payable** on the task bar. |
| **2.** | Click **Approvals**. |
| **3.** | Select **Invoices** to approve. |
| **4.** | Select the invoice that needs approval. |
| **5.** | Click **Assign** next to the invoice. |

## Approve/Complete (Acknowledge)

| Step | Task |
|---|---|
| **1.** | Verify invoice information: Line Item Details (quantity and price). |
| **2.** | Select **Approve/Complete Step** from **Available Actions**.<br>**NOTE**: Other options include: Approve/Complete & Show Next, Return to Shared Folder, Place Invoice on Hold, Forward, Reject/Cancel, and Add Comment & Add Notes to History. |
| **3.** | Click **Go**. |

## Return to Shared Folder

| Step | Task |
|---|---|
| **1.** | Select **Return to Shared Folder** from **Available Actions**. |
| **2.** | Click **Go**. |

## Place Invoice on Hold

| Step | Task |
|---|---|
| **1.** | Select **Place Invoice on Hold** from the **Available Actions**. |
| **2.** | Click **Go**. |
| **3.** | Enter the note. |
| **4.** | Click **Place Invoice on Hold**. |

## Forward

| Step | Task |
|---|---|
| **1.** | Select **Forward…** from **Available Actions**. |
| **2.** | Click **Go**. |
| **3.** | Enter the search criteria (example, **First Name, Last Name**). |
| **4.** | Click **Search**. |
| **5.** | Click **[Select]**. |
| **6.** | Enter the note. |
| **7.** | Click **Forward**.<br>**NOTE**: The invoice will now appear in the recipient's queue. |

## Reject/Cancel

| Step | Task |
|---|---|
| **1.** | Select **Reject/Cancel** from **Available Actions**. |
| **2.** | Click **Go**. |
| **3.** | Enter the **Reject Reason**. |
| **4.** | Click **Reject/Cancel**. |

## Add Comment

| Step | Task |
|---|---|
| **1.** | Select the invoice to edit. |
| **2.** | Select **Add Comment** from the **Available Actions** drop-down. |
| **3.** | Click **Go**. |
| **4.** | Select an email recipient (optional). |
| **5.** | Enter the comment. |
| **6.** | Attach a file or link (optional). |
| **7.** | Click **Add Comment**.<br>**NOTE**: Comment is accessible from the **Comments** tab of the invoice. |

## Add Notes to History

| Step | Task |
|---|---|
| **1.** | Select the invoice to edit. |
| **2.** | Select **Add Notes to History** from **Available Actions**. |
| **3.** | Click **Go**. |
| **4.** | Enter the note. |
| **5.** | Click **Attach**.<br>**NOTE**: Once the note is attached, it is accessible from the **History** tab of the invoice. |