How to Edit and Approve an Invoice

When you receive an approval request email, you will have four options to choose from: View Invoice, Hold, Reject and Approve. By clicking View Invoice, the Marketplace+/Coupa invoice page will open in your default web browser.

Approval Request for READYREFRESH - Invoice #123456

Hi Katherine,
Invoice #123456 is ready for your approval!

Supplier READYREFRESH
Total 25.30 USD
Items Water Cooler Rental 25.30 USD

Below is how the invoice will appear in your web browser. You can verify the Supplier name, Invoice #, and download the invoice by clicking on the hyperlink next to Attachments.
After reviewing, scroll down to the **Lines** header to view the total and worktags.

This invoice does not have a PO associated with it and was not sent to Accounts Payable with any worktag information. Since the **Billing** information currently has “TBD1-TBD2-TBD3” as a placeholder, **you need to populate the chartstring before approving.**

To enter the chartstring, click **Edit** button at the bottom of the page.
Once you click on the Edit button, a magnifying glass icon will appear next to the Billing line where it currently says “TBD1-TBD2-TBD3.” Click on the magnifying glass, and the screen below will appear where you can enter your UNET, Chartstring, and Spend Category and select Choose.

If you have populated the chartstring info and are ready to approve the invoice, click on the green Approve button at the bottom of the screen to submit the invoice.

**make sure to not exit the screen while it’s processing the approval**

After you approve, the invoice will either be fully approved/ready-to-pay or be pending with additional approvers.
**Troubleshooting**

If you do not know the correct worktags to use, you are able to add another Marketplace+ user into the approval chain. Click on Add Approver.

Search and select the user in the **Name** field and use the **Approver Position** to select **Before Current Approver**. You can also add additional approvers after you (After Current Approver) or watchers (As Watcher) to the invoice, if desired.

If there is a purchase order associated with this invoice, please leave a comment (Comments found at the bottom of the invoice page) with the correct PO, and Accounts Payable will apply the invoice to the PO.