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 External Inbox × | 3 2 |
|---|-----|
| Coupa Approval Notifications <approvals@brandeis.coupahost.com> 9:16 AM (0 minutes ago) ☆ ↔ to me ◄</approvals@brandeis.coupahost.com> | n i |
| Brandeis Approval Request for READYREFRESH - Invoice #123456 | |
| Powered by Coupa | |
| Hi Katherine, | |
| Invoice #123456 is ready for your approval! | |
| Supplier READYREFRESH | |
| Total 25.30 USD | |
| Items Water Cooler Rental 25.30 USD | |
| | |
| Looks good - want to approve? Something's wrong - need to reject? Need more info? Click the approve button below or simply reply to this email with the word Approve. No worries, just click the reject button below or reply to this email with the word Reject. Click View Involce and you'll be taken online to see everything. | |
| | |
| | |
| View Invoice Hold Reject Approve | |

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.

| Bran | deis | What do yo | ou need? | Q | | | | | KATHERINE | 🗸 👗 CAR | RT 🚺 | HELP 🗸 |
|-------|---|----------------------|------------------|-----------------|------------|----------------------------------|------------------------------|-----------------|-------------|--------------|------|--------|
| ♠ | Travel | l & Expenses | Requests | Orders | nvoices | Communi | ty | Inventory | Setup | More | | |
| Invoi | ces Ir | voice Lines | Invoice Inbox | Uninvoiced Orde | rs Accru | al Report | Export t | o Accounting | Insights | Legal Invoic | es | |
| I | Invoi | ce #123 | 456 | | | | | | | | | D |
| 2 | General Ir | n <u>fo</u> Lines To | otals & Taxes A | oprovers Comme | ents Payme | nts History | , | | | | ¢ | |
| 1 | 1 line to | lerance failure | on this invoice | | | | | | | | | |
| • | 🔂 Add Tag | 9 | | | | | | | | | | с. J. |
| | 🔅 Ge | eneral Info |) | | | 💡 Bill T | To & 1 | Ship To | | | | Ø |
| | | Supplier | READYREFRESH (| Active) | | Chart o | of Accou | nts WD Chart of | of Accounts | | | G |
| | | Invoice # | 123456 | | | в | luyer Tax | ID None | | | | |
| | Invoice Date 08/28/23 Payment Term Nel30 | | | | | 良 Sup | plier | Info | | | | |
| | Currency USD | | | | | | Remit To No address selected | | | | | |
| | | Status | Pending Approval | | | Invoice From No address selected | | | | | | |
| | Payr | nent Due Date | 09/27/23 | | | | Ship Fr | om No address | selected | | | |
| _ | | Supplier Note | None | | | Supplier Tax ID None | | | | | | |
| | | Attachments | Invoice_123456 | .pdf | | | | | | | | |
| | | Image Scan | None | | | | | | | | | |

| I 💽 Wate | r Cooler Rental | | Price 25.30 | 25.30 | \sim |
|--|---|------------------------|----------------------|-----------|----------|
| PO Line | | Contract | Supplier Part Number | Commodity | |
| None | | None | None | None | |
| WD LABELS | None | Springboard ID Not | ne | | |
| Diller | | | | | |
| WD Chart of | Accounts | | | | |
| TBD1- Please TBD1-TBD2-T | Assign Accounting -Pl BD3 | ease Assign Accounting | | | |
| | | | | | |
| | | | | | |
| Period | | | | | |
| Period None | | | | | |
| Period None Match Requ | red: Line not matched | 1 | | | |
| Period None Match Requ | ired: Line not matched | 1 | | | |
| Period None Match Requ | Ired: Line not matched | 1 | | Total 2 | 5.30 USD |
| Period None Match Requ | ired: Line not matched | mment here | | Total 2 | 5.30 USD |
| Period None Match Requ Comment Provid | Ired: Line not matcher approval/rejection co Withdr | mment here | Revalidate Hold | Total 2 | 5.30 USD |

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

| Type Description | | * Price | | E 20 🤞 |
|---|-------------------------------|-------------------------------------|-----------------------|-----------|
| Amt V Water Cooler R | ental | 25.3 | ο Ζ | 5.30 |
| PO Line | Contract | Supplier Part Number | Commodity | |
| None | | ~ | | ~ |
| | | | | |
| WD LABELS | Springboard ID | | | |
| | | v | | |
| | negon es ronnon | | | |
| | | | | |
| Billing | | | | |
| WD Chart of Accounts, TBI | D1- Please Assign Accounting | -Please Assign Accounting, TBD1-TBD | 2-TBD3 🔎 🗛 🐚 | |
| Set by user | | | | |
| | | | | |
| | | | | |
| | | | | |
| Period | | | | |
| Period | ~ | | Total | 25.30 USD |
| Period | | | Total | 25.30 USD |
| Period | tion comment here | | Total | 25.30 USD |
| Period ment Provide approval/rejec Withdraw Calci | tion comment here Late Cancel | Save Revalidate Ho | Total Dispute Reje | 25.30 USD |

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.

| Ту | ype * Description | | * Price | | \sim |
|-----|---|--------------------------|----------------------|-----------|-----------|
| 1 A | Amt 🗸 Water Cooler Rental | | 25.30 | | 25.30 😤 |
| PC | O Line | Contract | Supplier Part Number | Commodity | |
| No | one | | ~ | | ~ |
| Ch | noose an Account | | | | × |
| | Choose Chart Of Accou | nts WD Chart of Accounts | | | |
| | - UNET | ID TBD1 (TBD1) | × | ~ | |
| | • WD - CHARTSTRING/FI | TBD2 (TBD2) | ж | ~ | |
| | | | | | |
| | * WD - SPEND CATEGO | RY TBD3 (TBD3) | × | ~ | |
| | WD - SPEND CATEGO | RY TBD3 (TBD3) | × | ~ _ | Choose |
| Pa | WD - SPEND CATEGO | RY TBD3 (TBD3) | × | - | Choose |
| Pe | eriod | RY TBD3 (TBD3) | × | Total | Choose |
| Pe | eriod rt Provide approval/rejection or | mment here | × | Total | Choose |
| Pe | eriod at Provide approval/rejection cc Withdraw Calculate | mment here | ve Revalidate Hold | Total | 25.30 USD |

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.

