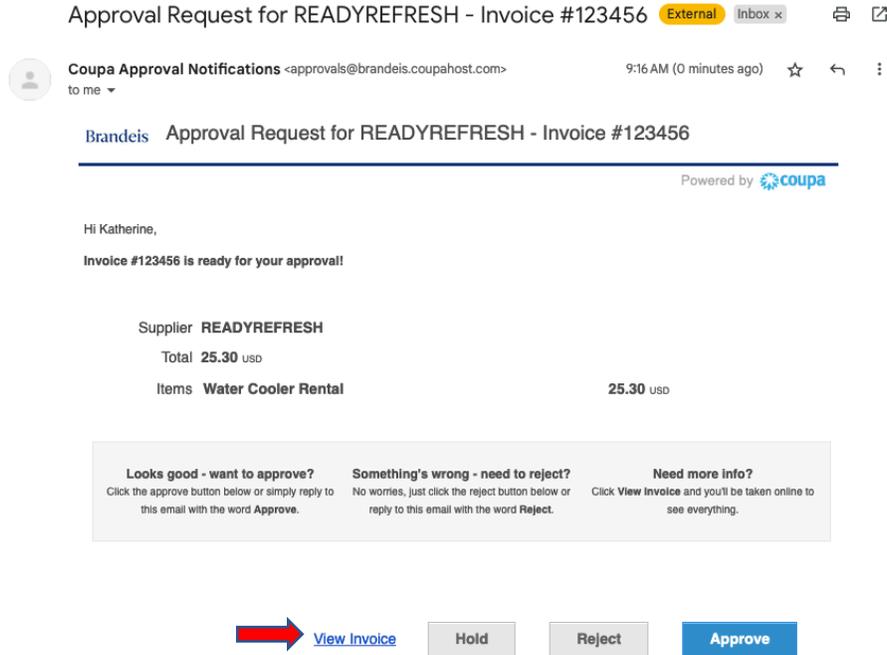


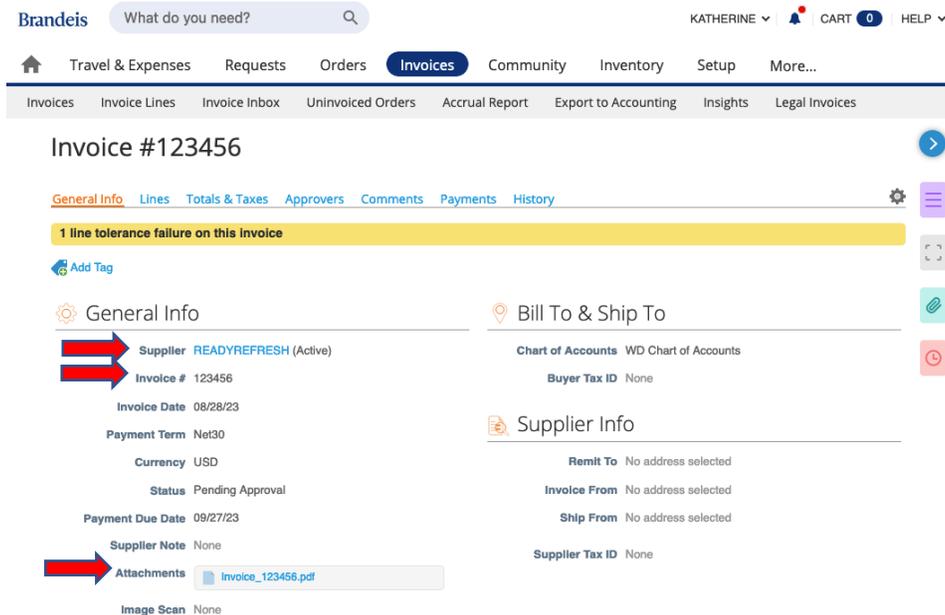
How to Edit and Approve an Invoice

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.



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.

General Info **Lines** Totals & Taxes Approvers Comments Payments History

Type	Description	Price
1	Water Cooler Rental	25.30

PO Line: None, Contract: None, Supplier Part Number: None, Commodity: None

WD LABELS: None, Springboard ID: None

Billing
WD Chart of Accounts
TBD1- Please Assign Accounting -Please Assign Accounting
TBD1-TBD2-TBD3

Period: None

Match Required: Line not matched

Add Tag

Total: 25.30 USD

Comment: Provide approval/rejection comment here

Withdraw Apply Tax Codes Revalidate Hold Dispute Reject Approve

Bypass Approvals Edit Restart Approvals

Invoice #123456 | POLAND SPRING WATER | 08/28/23

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

General Info **Lines** Totals & Taxes Approvers Comments Payments History

Type	Description	Price
1	Water Cooler Rental	25.30

PO Line: None, Contract: [Dropdown], Supplier Part Number: [Input], Commodity: [Dropdown]

WD LABELS: [Dropdown], Springboard ID: [Dropdown]

Billing
WD Chart of Accounts, TBD1- Please Assign Accounting -Please Assign Accounting, TBD1-TBD2-TBD3

Period: [Dropdown]

Total: 25.30 USD

Comment: Provide approval/rejection comment here

Withdraw Calculate Cancel Save Revalidate Hold Dispute Reject Approve

Bypass Approvals Restart Approvals

Invoice #123456 | POLAND SPRING WATER | 08/28/23

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.

The screenshot displays a software interface for managing an invoice. At the top, there are tabs for 'General Info', 'Lines', 'Totals & Taxes', 'Approvers', 'Comments', 'Payments', and 'History'. The main area shows a billing line for 'Water Cooler Rental' with an amount of 25.30. A 'Choose an Account' dialog box is open, allowing the user to select account information. The dialog box contains the following fields:

- Choose Chart Of Accounts: WD Chart of Accounts
- UNET ID: TBD1 (TBD1)
- WD - CHARTSTRING/FDM: TBD2 (TBD2)
- WD - SPEND CATEGORY: TBD3 (TBD3)

A 'Choose' button is located at the bottom right of the dialog box. Red arrows point to each of these fields and the 'Choose' button. Below the dialog box, there is a 'Period' dropdown and a 'Total' of 25.30 USD. At the bottom of the screen, there is a 'Comment' field and several action buttons: 'Withdraw', 'Calculate', 'Cancel', 'Save', 'Revalidate', 'Hold', 'Dispute', 'Reject', and 'Approve'. A red arrow points to the 'Approve' button. There are also 'Bypass Approvals' and 'Restart Approvals' buttons, and a checkbox for 'Open next document'.

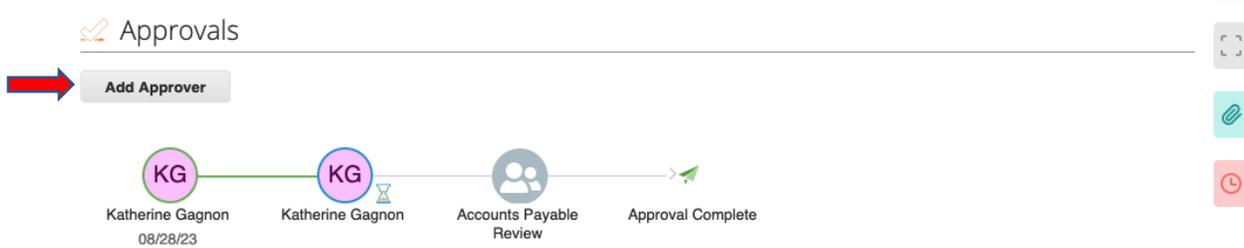
If you have populated the chartstring info and are ready to approve the invoice, click on the green Approve button at the bottom of the screen to submit the invoice.

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

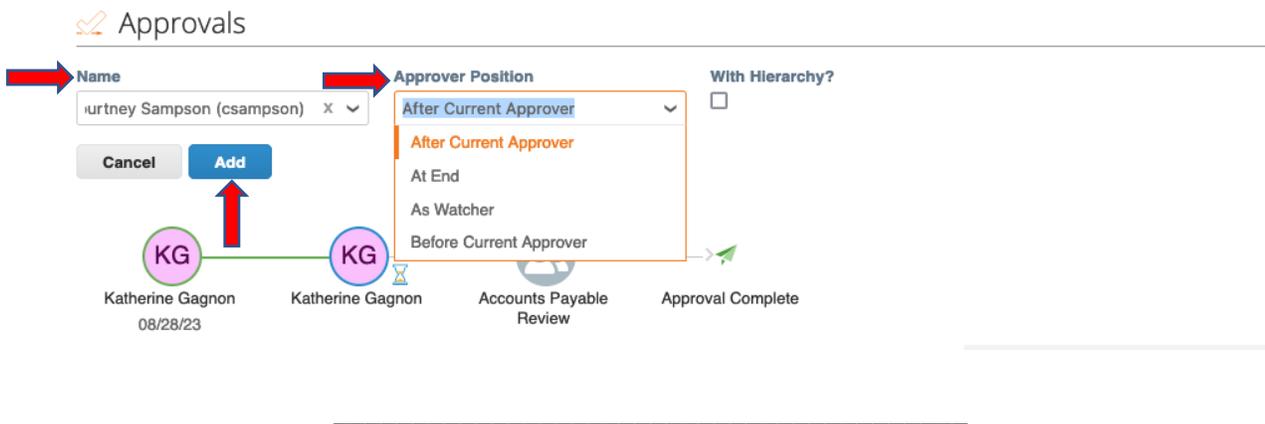
After you approve, the invoice will either be fully approved/ready-to-pay or be pending with additional approvers.

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.

