Approve Invoices/Credit Memos

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Locate and Open

1. Approvers will receive an e-mail with a subject of New Pending Approval for Invoice# XXXXXX for each invoice/credit memo they need to approve.

2. Login to E-Market.

3. From the menu icon, hover over Approvals then click Invoices to Approve or if you previously bookmarked Invoices to Approve navigate to it from (Bookmarks).

4. You will be on the Invoices to Approve page.

5. The approval Type may need to be changed if it is not already on Invoice. If necessary, click under Type and choose Invoice. If you also have requisitions to approve you can choose Requisition.

6. Click to expand the approval folder you wish to review.
Approve Invoices/Credit Memos

7. Click on the Invoice No. in blue to open invoice/credit memo.

8. You will be in the invoice/credit memo document.

Review

1. **Attach Invoice (Recommended) section (mid-screen)** – Click on link in blue to open attachment (if there is one) and review. Example of section above.

2. **Accounting Codes section (mid-screen)** – Review 16-digit account number is appropriate for what is being paid. Example of section above.

3. **Enter Service Description, Quantity and Invoice Amount (Required) section (bottom screen)** – Review description of services rendered and invoice amount. Example of section below.

4. To approve invoice/credit memo skip to Approve.
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Edit

1. Next to Available Actions Assign click **Go**.

2. To edit a section, click **edit** in that section, make changes then click **Save**.

3. To change Accounting Codes manually enter 1 or more parts or click on Select from… links and then choose from dropdown lists. When finished, click **Save Values**.

4. To approve invoice/credit memo skip to **Approve**.

Return/Reject

1. Reject only if invoice/credit memo should not be paid. The invoice/credit memo will be cancelled so it cannot be re-submitted.

2. Next to Available Actions Assign click **Go**.
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3. Click on next to Available Actions and choose one of the following then click Go.
   - **Return Invoice (Recommended)** – Choose if you want the user who entered the invoice/credit memo to make changes and re-submit.
   - **Reject/Cancel** – Choose if invoice/credit memo should not be paid. The invoice/credit memo will be cancelled so it cannot be re-submitted.

![Available Actions Menu]

4. One of the small windows below will appear depending on your choice, enter your reason.

![Return Invoice to User]

![Add Note]

5. Click Return or Reject/Cancel. User who entered will receive an email that their invoice/credit memo has been returned or rejected. Click Back to Approvals to return to My Approvals list.

Approve

1. To approve click next to Available Actions and choose Approve/complete step & show next then click Go.

![Available Actions Menu]

2. The invoice/credit memo will be approved and you will automatically be on the next invoice/credit memo if there are more than 1 in the folder otherwise you will be brought back to My Approvals.

3. Repeat process for each invoice/credit memo in each folder.