

Quick Reference

Invoice Approval/Return

Approve via Email

Approvers will receive an email notification for each invoice that needs their approval.

1. Approvers may approve the invoice by clicking the green **Accept** button.
 - a. To review attachments, click the **View Images** link.

ACTION REQUIRED Chrome River

Vendor Address: X10002300-AT&T [X10002300]

Department Approval / Routing Created By: Sonya Emmart

Create Date: 02/13/2020

Vendor Invoice Number: testing

Invoice Date: 02/12/2020

Invoice Amount: 50.00 USD

Payment Message: vendor address

Business Purpose: vendor address

ACCEPT **RETURN**

Click on the ACCEPT or RETURN button as appropriate and add any comments to the new email that opens.

To view this online, go to [Chrome River](#)

Funding Summary			Amount (USD)
A0003-101614-20450	A0003: GU State General Fund	101614: Regents Press of Kansas	50.00

>> [View Images](#) Invoice ID: QA00-1061-0504

2. The system will forward an email to a Chrome River email address. Approvers must click **Send** to complete the approval process.

File Message Insert Options Format Tex Review Acrobat Tell me...

To... approve@qa-invoice.ca1.chromeriver.com

Cc...

Send

Subject: Chrome River Invoice Approval [X10002571-Umb Bank Visa]

Enter any optional NOTES in the space above this line to have them added to this invoice report, then SEND this message to the Chrome River automated processing system for your action to be completed.

Invoice ID: QA00-1060-9057

Return via Email

Approvers will receive an email notification for each invoice that needs their approval.

3. Approvers may deny an invoice by clicking the red **Return** button.

ACTION REQUIRED Chrome River

Vendor Address: X10002300-AT&T [X10002300]

Department Approval / Routing Created By: Sonya Emmart

Create Date: 02/13/2020

Vendor Invoice Number: testing

Invoice Date: 02/12/2020

Invoice Amount: 50.00 USD

Payment Message: vendor address

Business Purpose: vendor address

ACCEPT **RETURN**

Click on the ACCEPT or RETURN button as appropriate and add any comments to the new email that opens.

To view this online, go to [Chrome River](#)

Funding Summary			Amount (USD)
A0003-101614-20450	A0003: GU State General Fund	101614: Regents Press of Kansas	50.00

>> [View Images](#) Invoice ID: QA00-1061-0504

4. The system will forward an email to a Chrome River email address. Approvers must enter a return comment and click **Send** to complete the return process.

File Message Insert Options Format Tex Review Acrobat Tell me...

To... return@qa-invoice.ca1.chromeriver.com

Cc...

Send

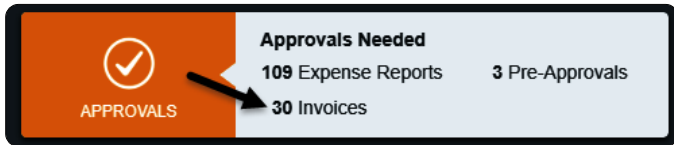
Subject: Chrome River Invoice Approval [X10002571-Umb Bank Visa]

Enter the reason for return NOTES in the space above this line to have them added to this invoice report, then SEND this message to the Chrome River automated processing system for your action to be completed.

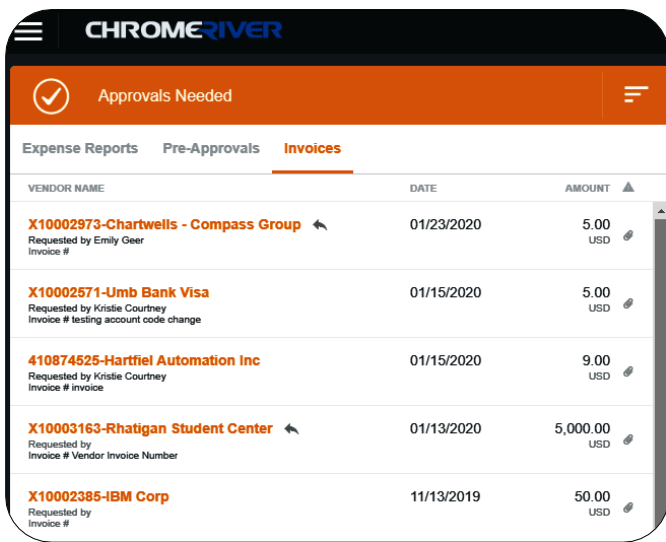
Invoice ID: QA00-1060-9057

Approve via Chrome River

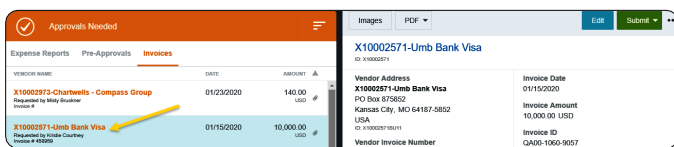
5. On the landing page, locate the **Approvals** swim lane. In the **Approvals Needed** section, tap the number listed next to the **Invoices** category. This will take you to the **Approvals Needed** dashboard.



6. The **Approvals Needed** screen will display.



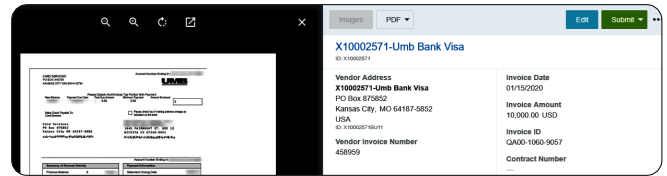
7. Click once on the invoice to display it on the right side of the screen.



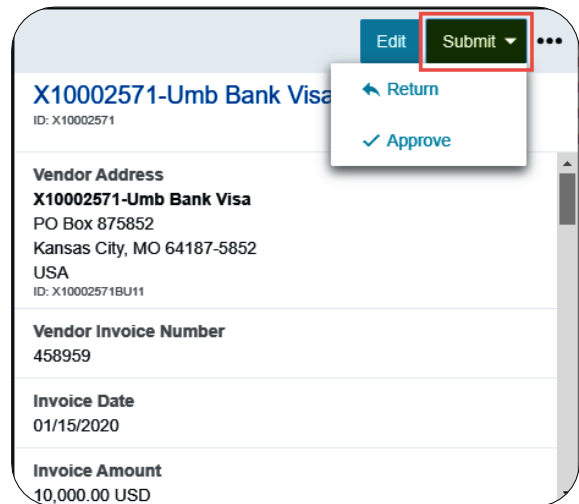
8. Click the **Images** button to display the attachment(s) on the left side of the screen.



9. Review the information displayed on the attachment along with the information entered into the invoice.

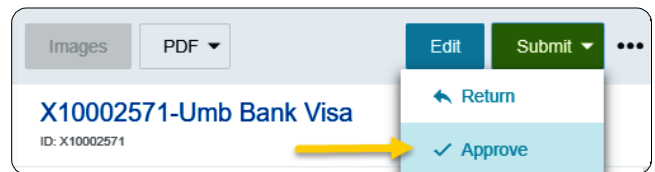


10. Click the **Submit** button in the upper right corner to display the **Return** and **Approve** options.



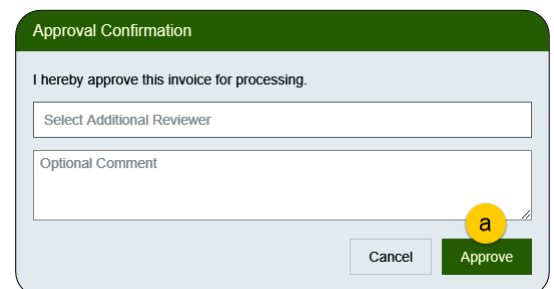
Option 1 - Approve Invoice

11. To approve the invoice and move it forward in the workflow process, click **Approve**.



12. The **Approval Confirmation** page will display. This page provides the option to:

- a. **Approve** the invoice and move it forward in the approval process.



- b. Insert an **Additional Reviewer** into the approval process and **Approve** the invoice.

The screenshot shows the 'Approval Confirmation' dialog. It contains the text 'I hereby approve this invoice for processing.' followed by a text input field with 'Kristie Courtney' and a yellow arrow pointing to it. Below this is another text input field with the placeholder 'Comments are required when an Additional Review is selected.' and a yellow arrow pointing to it. At the bottom right, there is a yellow circle with the letter 'b' next to the 'Approve' button.

15. Click the Select box to display the available options.

The screenshot shows the 'Return Confirmation' dialog. The 'Return invoice to:' dropdown is open, showing a 'Select' box at the top. Below it, under the heading 'Accounts Payable', there are three options: 'Sonya Emmart Creator', 'Kristie Courtney Requester', and 'Other'. Below the 'Other' option, there is a blue link for 'X10002571-Umb Bank Visa' and the ID 'X10002571'. At the bottom, there is a 'Vendor Address' field.

Option 2 - Return Invoice

13. To deny the invoice and return it for modification, select **Return**.

The screenshot shows an invoice card for 'X10002571-Umb Bank Visa' with ID 'X10002571'. A context menu is open over the card, showing three options: 'Return' (with a left arrow icon), 'Approve' (with a checkmark icon), and a third option that is partially obscured.

14. The **Return Confirmation** screen will display.

The screenshot shows the 'Return Confirmation' dialog. The 'Return invoice to:' dropdown is set to 'Sonya Emmart Creator'. Below it is a 'Required Comment' text area. At the bottom, there are 'Cancel' and 'Return' buttons.

16. Choose the person or group to return the invoice to for correction, enter the required comment and click the Return button

The screenshot shows the 'Return Confirmation' dialog. The 'Return invoice to:' dropdown is set to 'Sonya Emmart Creator'. Below it is a text area with the placeholder 'Comments are required when returning an invoice.' At the bottom, there are 'Cancel' and 'Return' buttons.