

The eBuy Invoice Approval Tool is designed to allow for the electronic routing and approval of invoices requiring explicit approvals (i.e. PO invoices \$10K or greater) prior to payment processing.

Quick Guide

eBuy Invoice Approval Tool

Accounts Payable

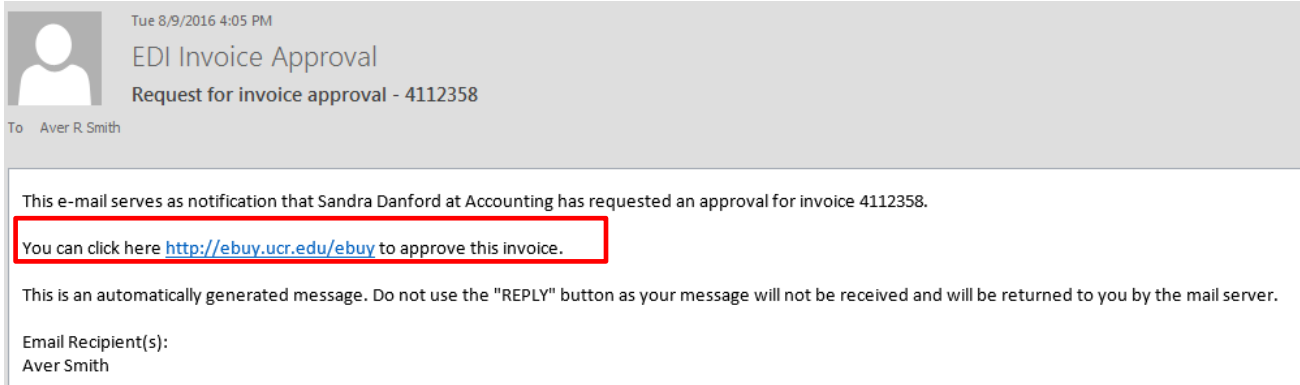
Last Save Date: July 30, 2020

Quick Guide

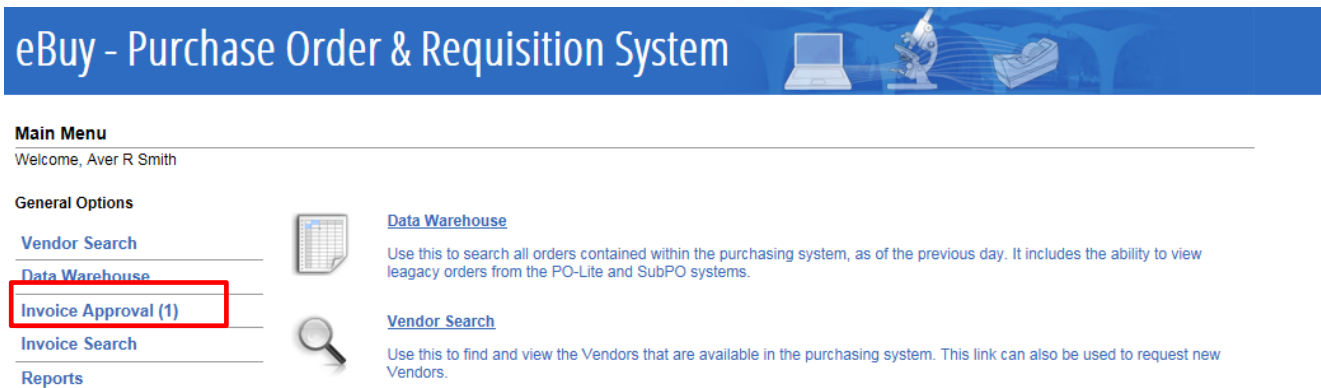


Instructions for using the eBuy Invoice Approval Tool.

Individuals possessing the eBuy Invoice Approver role, under the Accountability Structure associated with the purchase order, will receive an email notification when an invoice requires explicit approval.



Click on the link in the email. Once in eBuy, click on the Invoice Approval link



Quick Guide

An Invoice Approval window will be displayed

The screenshot shows a window titled "Invoice Approvals" with the following details:

- Invoice Number: 4112358 (with a document icon)
- Invoice Date: 07/27/2016
- Vendor Name: KEYSIGHT TECHNOLOGIES INC
- PO Number: 10723831 (with a "View" link)
- Invoice Total: \$15,918.61
- Accountability Structure: D01057-Physics and Astronomy

Below the details are "APPROVE" and "REJECT" buttons. A link "Understanding Invoice Approval" is also present. A table below shows the approval request details:

Approval Requested From			Accounting Contact		Action	User	Date E-mail Sent
Name	E-mail	Phone	Name	Phone			
Aver Smith	AVERS@ucr.edu	(951) 827-1959	Sandra Danford	(951) 827-1933	Sent Email for Approval	Sandra Danford	08/09/2016 04:04 PM

At the bottom, there are links for "Comment History Add" and "Uploaded Documents Add".

From this window, the Approver can:

- Review the invoice by clicking on the icon next to the invoice number
- View the PO by clicking on the link next to the PO number
- Obtain additional information on approvals

Quick Guide



Invoice Approval

If the goods/services have been received and are in good condition/working order, the invoice should be approved. To approve the invoice, click the green "Approve" button

Invoice Approvals

Invoice Number: 4112358
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PO Number: 10723831 [View](#)
Invoice Total: \$15,918.61
Accountability Structure: D01057-Physics and Astronomy

APPROVE **REJECT**

[Understanding Invoice Approval](#) [Close](#)

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Comment History [Add](#)

Uploaded Documents [Add](#)

Once approved, the invoice approval pop up window will be updated and reflect the user name of the approver along with the date/time approved. Close the Invoice Approval pop-up window.

Invoice Approvals

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[Close](#)

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Name	E-mail	Phone	Name	Phone				
Aver Smith	AVERS@ucr.edu	(951) 827-1959	Sandra Danford	(951) 827-1933	Approved	Aver Smith	08/09/2016 05:53 PM	Email
Aver Smith	AVERS@ucr.edu	(951) 827-1959	Sandra Danford	(951) 827-1933	Sent Email for Approval	Sandra Danford	08/09/2016 04:04 PM	

Comment History [Add](#)

Uploaded Documents [Add](#)

Role	File Name	User Name	Date
Department	Signed Invoice	Aver Smith	08/09/2016 05:47 PM

Quick Guide



Proxy Approval & Attachments:

If the designated EACS invoice approver, obtains documentation to support the approval that should be included in the approval history, the approver may upload the documentation as support (e.g. a Principal Investigator’s sign-off to pay an invoice charged to their sponsored project)

Under Uploaded Documents, click “Add”. In the pop-up window, enter a description of the document being attached; click “Browse” to locate and upload the file; and click Save. The document will appear under the Uploaded Document section.

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Invoice Date: 07/27/2016

Vendor Name: KEYSIGHT TECHNOLOGIES INC

PO Number: 10723831 [View](#)

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[APPROVE](#) [REJECT](#)

[Understanding Invoice Approval](#) [Close](#)

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Comment History [Add](#)

Uploaded Documents [Add](#)

Role	File Name	User Name	Date
Department	Signed Invoice	Aver Smith	08/09/2016 05:47 PM



Quick Guide



Rejecting an Invoice

There are several reasons an invoice should be rejected:

1. The invoice references the incorrect purchase order number; please enter a comment.
2. The Accountability Structure associated with the purchase order is incorrect, so the designated approvers are not appropriate; please enter a comment indicating the correct Accountability Structure.
3. The invoice should not be paid because:
 - a. The item was damaged during delivery; please enter a comment
 - b. The incorrect item was shipped and returned; please enter a comment
 - c. The item cannot be accepted; please enter a comment explaining the circumstances

To enter a comment, under Comment History click "Add" and enter the appropriate information and save.

After the comment is entered, click the red "Reject" button (under the Vendor Name) to return it back to Accounting

Invoice Approval

Invoice Approvals

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[Understanding Invoice Approval](#) [Close](#)

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Comment History [Add](#)

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Role	File Name	User Name	Date
Department	Signed Invoice	Aver Smith	08/09/2016 05:47 PM

