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

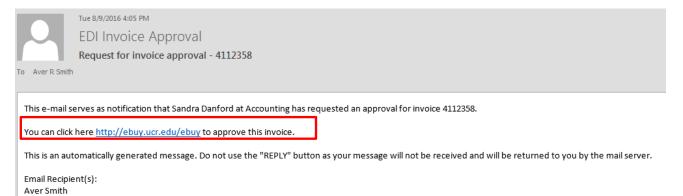
Accounts Payable

Last Save Date: July 30, 2020



# 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



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Name Aver Smith	E-mail AVERS@ucr.edu	Phone (951) 827- 1959	Name Sandra Danford	(951) 827- 1933	Sent Email for Approval	Sandra Danford	08/09/2016 04:04 PM	
	t History <u>Add</u> I Documents <u>Add</u>							

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

eBuy Invoice Approval Tool

## **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

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		Inv	oice Approva	ls		
Invoice Number: 4112358 Invoice Date: 07/27/2016 Vender Name: KEYSIGHT TE APPROVE REJECT	CHNOLOGIES IN	NC	PO Number: Invoice Total: Accountability	10723831 <u>View</u> \$15,918.61 <b>Structure:</b> D01057-Phys	sics and Astronom	y
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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.

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Business & Financial Service University of California Riverside eBuy Invoice Approval Tool

#### **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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# Quick Guide

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### **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.

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- 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

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Name	E-mail	Phone	Name	Phone	Action	User	Date E-mail Sent
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
Role	ocuments <u>Add</u>			User Name		Date	
Department	Signed Invoice		Aver Smith		08/09	9/2016 05:47 PM	
							<b>UCRIVESSITY OF CALIF</b>
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