Tulane University
SciQuest

Module 6: Invoice Approvals
6.0 Creating an Invoice

Target Audience: Invoice Approver

Users have the ability to create invoices for purchase orders.


2. From the document search screen, search for purchase orders.

3. Select the purchase order that requires the creation of an invoice.

4. In the Document Actions drop down menu, select Create Invoice.

5. Complete all of the required fields and select Finalize Invoice.

A confirmation of the buyer invoice will be displayed.
6.1 Editing an Invoice
Target Audience: Invoice Approver

1. From the navigation menu, click the Accounts Payable icon and Search for Invoices.

2. Enter applicable information in the Invoice Search fields and select Search.

3. From the search results, select the invoice that requires review and approval.

4. Once the invoice is open, edits can be made in any of the invoice sections by selecting the Edit links.
6.2 Rejecting an Invoice
Target Audience: Invoice Approver

1. From the navigation menu, click the Accounts Payable icon and Search for Invoices.

2. Enter applicable information in the Invoice Search fields and select Search.

3. Using the invoice filters, filter invoices based on Workflow Status. The invoice must be pending in order to reject it.

4. Select the invoice number that should be rejected.
5. From the **Document Actions** drop down menu, select **Reject/Cancel**.

6. Add a note including the reason for rejecting the invoice.
### 6.3 Forwarding an Invoice

**Target Audience:** Requester/Invoice Approver

1. From the navigation menu, click the **Accounts Payable** icon and search for Invoices.

2. Enter applicable information in the Invoice Search fields and select Search.

3. Using the invoice filters, filter invoices based on **Workflow Status**. The invoice must be pending to forward it to another approver.

4. **Select** the invoice number that should be forwarded.
5. From the **Document Actions** drop down menu, select **Forward**.

6. Search the appropriate user that should receive the invoice.

7. Select the user.

8. Add a note that will be attached to the invoice. Select **Forward**.
6.4 Placing an Invoice on Hold
Target Audience: Invoice Approver

1. From the navigation menu, click the Accounts Payable icon and Search for Invoices.

2. Enter applicable information in the Invoice Search fields and select Search.

3. Using the invoice filters, filter invoices based on Workflow Status. The invoice must be pending put a hold on the invoice.

4. Select the invoice number that should be placed on hold.
5. From the **Document Actions** drop down menu, select **Place Invoice on Hold**.

6. Add a note to the invoice.
6.5 Reviewing and Approving Invoices
Target Audience: Invoice Approver

1. From the navigation menu, click the Accounts Payable icon and Search for Invoices.

2. Enter applicable information in the Invoice Search fields and select Search.

3. From the search results, select the invoice that requires review and approval.

4. Review the invoice and make edits as necessary.

5. Select Approve/Complete stop from the Document Actions drop down menu.