

PROCUREMENT: Receiving & Invoice Approvals

Overview

This job aid is intended for all Shoppers who have created a requisition and received the ordered goods or services.

Receiving and Invoice Approvals Summary:

1. After a requisition is processed into a Purchase Order and dispatched to the Supplier, the Shopper will await delivery of the goods or services they ordered.
2. The Supplier will then send the invoice to Baylor Accounts Payable.

NOTE: The following requirements apply to all Invoices.

- Invoices should be sent directly to: Accounts_Payable@baylor.edu
- Invoices should be sent in PDF format
- Purchase Order # must be on the Invoice – not just in the body of the email
- Each invoice must be a separate attachment. Multiple invoices cannot be combined into one document due to software limitations.

3. If the shopper receives the invoice directly, it should be emailed to Accounts Payable at: Accounts_Payable@baylor.edu
4. If an invoice is under \$10,000 it will automatically be paid upon receipt and verification of the invoice.
5. If an invoice is over \$10,000, the Shopper will receive a notification requiring action to be taken on the invoice in Ignite.
 - a. The Shopper's approval signifies that the goods have been received or the services have been performed and the invoice is ready for payment.
 - b. The Shopper's rejection of the invoice means that the invoice should not be paid.
6. Accounts Payable Administrators will proceed with making a payment to the Supplier upon approval by the Shopper.

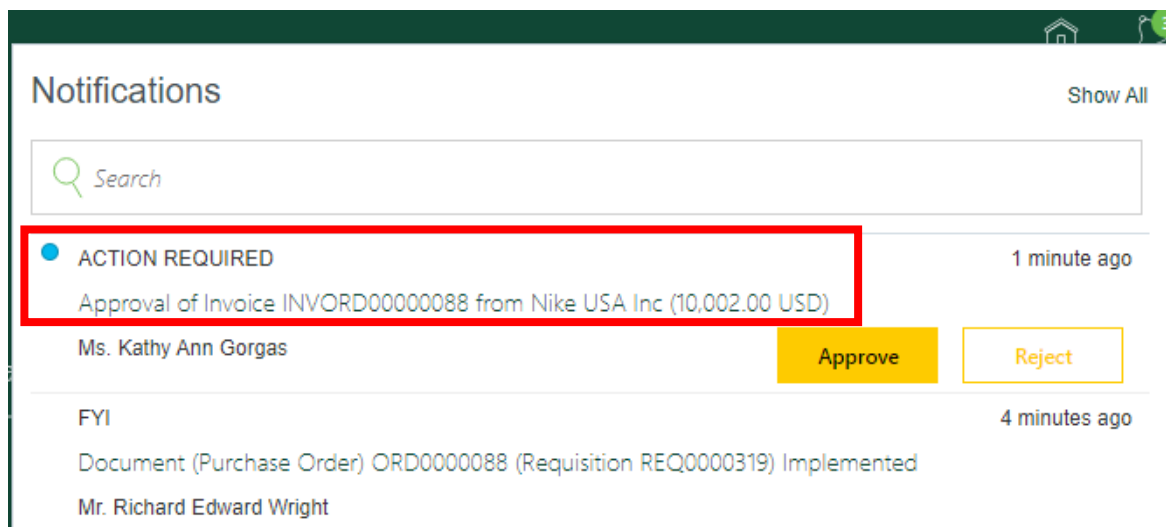
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I. Invoice Notification

1. To see an invoice that has been sent to you for approval as a Shopper, select the **notification bell** to see all notifications.



2. The invoice from the supplier will appear as a notification. Click on the **invoice notification**.



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2. Approving an Invoice

- I. Once you select the invoice that you need to review, choose one of the following options:
 - a. If you received the correct order, click **Approve**.

Invoice INVORD00000088 from Nike USA Inc (10,002.00 USD)

[View Invoice](#)

Actions ▾

[Approve](#)

[Reject](#)

Invoice Approval

10,002.00 USD

Nike USA Inc

INVORD00000088

1/30/20

Details

From Gorgas

Supplier Site Site0000011

Business Unit BAYLOR

- b. If there is an issue with the invoice and it should not be paid, click **Reject** and provide comments as to why you are taking this action. The Shopper must contact the Supplier directly to discuss issues with their order and request a corrected invoice.

Invoice INVORD00000088 from Nike USA Inc (10,002.00 USD)

[View Invoice](#)

Actions ▾

[Approve](#)

[Reject](#)

Invoice Approval

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- c. Click the **Actions** dropdown if you want to reassign, delegate, split distribution, or request more information.
 - i. **Request Information:** Request additional information needed to decide whether to approve or reject the invoice
 - ii. **Delegate:** Pass the task to someone else to act on your behalf, but the task is still assigned to you
 - iii. **Reassign:** Reassign the task to someone you select

Invoice INVORD00000088 from Nike USA Inc (10,002.00 USD)

View InvoiceActions ▾Approve

Edit Distributions

Request Information

Delegate

Reassign

Add Comments

Add Attachment

View Approvals

Invoice Approval

10,002.00 USD

Nike USA Inc


INVORD00000088

1/30/20

2. After selecting approve, on the pop-up add a **Comment**. Then, click **Submit**.

ApproveSubmitCancel

Comment



Drag files here
or click to add
attachment

▼