## **Approving An Invoice**

In MarketPlace, a \$5,000 dollar threshold dictates how invoices are routed in the system for approval.

- Invoices under \$5,000 do not require approval. Instead, a payment notification is routed to the individual listed as the "prepared for" on the requisition, alerting them to the impending payment. Please note: if you receive a payment notification and wish to stop the payment from being released, contact the Help Desk Intake Form to cancel the impending payment.
- Invoices above \$5,000 in total, require the approval in MarketPlace, of the "prepared for" person prior to payment being released.

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Access the action center by clicking the <u>flag icon</u> in the upper right corner of the home screen. Click on the invoices action to view invoices awaiting your approval. You can also find approvals under Accounts Payable > Approvals > Invoices to Approve or in the top right corner under Notifications if enabled.

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Under the *Invoices* tab you can view all invoices pending approval by clicking on the carrot to the left of 'My Invoice Approvals'.

- individual invoice.
- the top right hand corner.

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## UTGERS University Procurement Services Training

• If needed, you can click the Invoice number in blue to view the invoice information to ensure everything matches. Make any changes as necessary.

• If everything looks correct, click the check mark to the right of the line item to approve the

• You can also select an invoice using the check box to the left of the line item and use the action drop down seen below for more options.

• You may also mass approve all matched invoices by clicking 'Approve All Matched Invoices' in

	<b>O</b>	? Creat	e Date Newest Firs	at 🔻 Approve	All Matched Invoices
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3/3/2022		No. of Lines:		1	
2022-03-03 pap187 02 PO Invoice Manual		Folders		0 Days in folder [My	Invoice Approvals]
	Select an action Assign Approve/Complete Forward Return to Shared Fold Add Notes to History	er			
	Select an action 🗸				

the cases where the invoice is greater than \$5,000, the individual designated as the "prepared for" user on the corresponding purchase order is routed the invoice for approval prior to payment being made.

## **Forwarding An Invoice**

In MarketPlace, a \$5,000 dollar threshold dictates how invoices are routed in the system for approval.

- Invoices under \$5,000 do not require approval. Instead, a payment notification is routed to the individual listed as the "prepared for" on the requisition, alerting them to the impending payment. Please note: if you receive a payment notification and wish to stop the payment from being released, contact the Help Desk Intake Form to cancel the impending payment.
- Invoices above \$5,000 in total, require the approval in MarketPlace, of the "prepared for" person prior to payment being released.

Access the action center by clicking the *flag icon* in the upper right corner of the home screen. Click on the invoices action to view invoices awaiting your approval. You can also find approvals under Accounts Payable > Approvals > Invoices to Approve or in the top right corner under Notifications if enabled.

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In the note field, add around why you are for the invoice. Click 'Forv send the invoice selected user for revi approval.

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Under the Invoices tab you can view all invoices pending approval by clicking on the carrot to the left of 'My Invoice Approvals'. If needed, you can click the Invoice number in blue to view the invoice information to ensure everything matches. Make any

IER NAME	ASSIGNED APPROVER	CREATE DATE
ry Legs- 301	Lauren Karol	3/3/2022 2:23 PM
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7 02		Folders
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	Add Notes to History	
	Select an action 🗸	

changes as necessary.

<u>Select the invoice</u> by checking off the box to the left of the line item and use the action drop down at the bottom of the screen to select 'Forward'.

Search for the appropriate RU Marketplace user by utilizing any one of the search fields , then hit 'Select' to confirm your choice. Please note that the search results will contain only those individuals who are authorized to review and approve invoices.

Name 🔺	User Name 🗠	Email 🗠	Phone	Action
Perrone, Patricia	pap187	pap187@finance.rutgers.edu		[selec
Forward		×		
Forward		×		
Forward  For Invoices: 306917		×		
Forward  For Invoices: 306917		×		
Forward For Invoices: 306917 To - Patricia Perrone		×		
Forward To - Patricia Perrone		991 / 1000		
Forward For Invoices: 306917 To - Patricia Perrone Test Note		991 / 1000		
Forward  For Invoices: 306917 To - Patricia Perrone Test Note		991 / 1000		
Forward  For Invoices: 306917 To - Patricia Perrone Test Note		991 / 1000		