

## Invoice Approval

1. Click on the Invoice Payment link to start the form.
  - a. You will be prompted to log in to Adobe Sign.
  - b. In the *email address line*, type in your full saclink email address, including @csus.edu (ex. [xxxxx@csus.edu](mailto:xxxxx@csus.edu)) (see figure 1. for the Adobe Sign-In screenshot).
  - a. Click the **Continue** button.
  - b. You will see an Adobe Sign splash screen as it routes you to the *Adobe Sign Send* page.

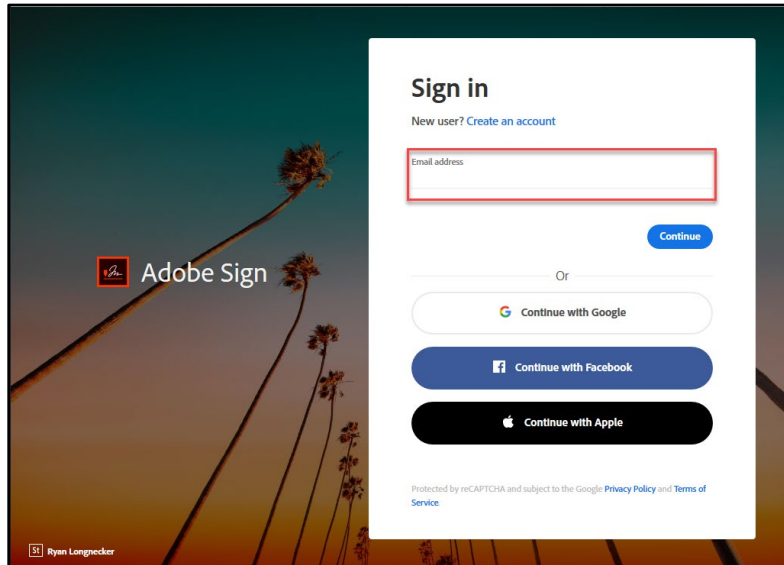


Figure 1. Adobe Sign-In screenshot

2. Once on the *Adobe Sign Send* page (see figure 3. for the *Send* page screenshot)
  - a. Click **More** for instruction on this form.
  - b. Navigate to the *Recipient* fields and enter the primary email address for the Approver. To ensure you are using the primary email address, navigate to [directory.csus.edu](https://directory.csus.edu)
    - i. **Optional**- Preapproval by a designated staff may be required by your department or VP, please input the staff's email below if applicable.
    - ii. **REQUIRED FIELD**- *Department Approving Official (Signature must be on file in Delegation of Authority list in CFS)*
  - c. The *Accounts Payable* email address auto-populates and you will not be able to change this.
  - d. In the *CC* field, enter email(s) if applicable.
  - e. In the *Document Name* field, after *Invoice Approval*, enter the vendor name (e.g. *Invoice Approval – ABC Company*).
  - f. Navigate to the *Invoice* fields. Click on *Add File* to attach the invoice. Each invoice should be complete on it's own template for approval.
  - g. Click the **Send** button to route the form for signature.

The screenshot shows the Adobe Sign interface for sending an invoice approval form. At the top, there's a navigation bar with 'Home', 'Send', 'Manage', and 'Reports'. The main heading is 'AP\_Invoice Approval'. Below it, there are instructions: 'How this workflow works?' followed by two steps: '1. Enter your email address as published in the Campus Directory at https://directory.csus.edu' and '2. Upload a copy of the invoice to be approved'. A 'more' dropdown is visible next to the instructions.

The 'Recipients' section is highlighted with a red box. It contains three rows:
 

- Preapproval**: A note states 'Preapproval by a designated staff may be required by your department or VP, please input the staff's email below'. Below this is a field 'Enter recipient email' with an 'Email' dropdown.
- Invoice Approver**: A field 'Enter recipient email' with an 'Email' dropdown.
- Accounts Payable**: A field containing the email 'aba-svc-signfin@csus.edu' with an 'Email' dropdown.

Below the recipients is a 'CC' field with a 'Hide' link and a text input 'Enter CC's emails'. The 'Document Name' section is also highlighted with a red box, showing a field with the text 'Invoice Approval- AT&T'. The 'Message' field contains the text 'Please Sign.'. The 'Files' section shows two entries: 'Invoice Approval Form' and 'Additional Document (if applicable)', each with an 'Add File' button. The 'Add File' button for the first entry is highlighted with a red box. At the bottom left, there is a blue 'Send' button highlighted with a red box.

Figure 2. Send page screenshot



3. Once on the form, click the yellow tab to navigate to the required fields and type in your information (see figure 3. for the Invoice Approval form screenshot).
  - a. Use the Comments section for Line item instruction, additional PO #, etc.

The screenshot shows the 'Invoice Approval' form interface. At the top left is the Sacramento State logo and 'POWERED BY Adobe Sign'. The page title is 'Invoice Approval-hornet'. A 'Start' button is highlighted with a red box on the left. The form fields are: 'Invoice Number:' with a red asterisk and a yellow input field; 'Purchase Order Number(s):' with a red asterisk and a yellow input field; 'Dollar Amount Approved:' with a red asterisk, 'USD' entered, and a yellow input field; 'Approved for Payment By:' with a red asterisk and a yellow input field containing 'Click here to sign'; 'Approvers Signature' with a yellow input field; and 'Comments (Line item instructions, additional Purchase Order Numbers etc.):' with a large yellow text area. A 'Next Required' button with the number '4' is in the top right.

Figure 3. Invoice Approval form screenshot

4. Once all the required fields are completed, click the blue **Click to Send** button at the bottom of your screen (see figure 4. the Click to Send button screenshot).



Figure 4. Click to Send button screenshot

5. A thumbnail of the form and confirmation message will display. (see figure 5. Confirmation message screenshot) This message confirms that the Invoice Approval form was sent for approval. You will also receive an email confirmation that the document was sent out. This completes your portion of the workflow.

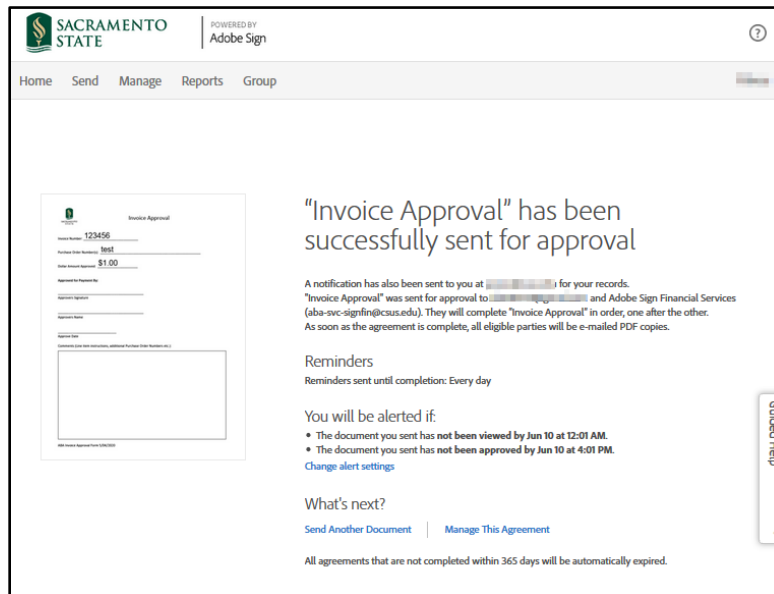


Figure 5. Confirmation message screenshot

6. Once the invoice is approved, you will receive an email confirmation. (see figure 6. Approval Confirmation screenshot) To view the approved document, click on the link provided in the email.

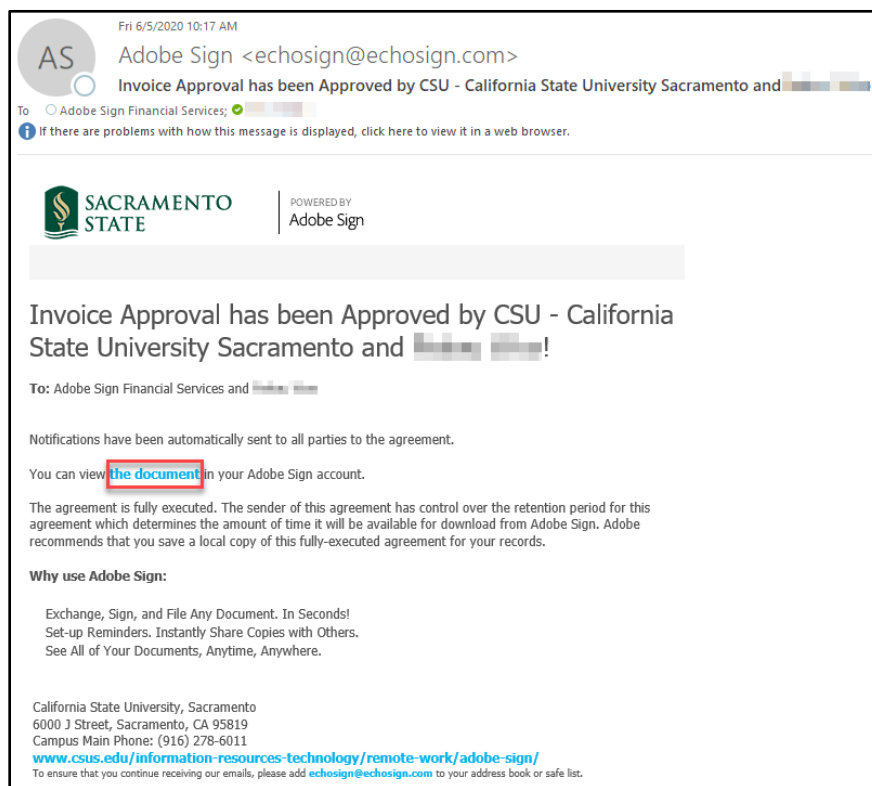


Figure 6. Approval Confirmation screenshot