

How to Approve/Reject an eInvoice/Credit Note

Purpose

This document details how a Booker or Budget Holder/(Nominee) can approve/reject an eInvoice/Credit Note. If the Booker and the Budget Holder are the same person then a single approval is required.

Steps

1. Email alert is received
2. Logon to [Agresso](#)
3. Review the eInvoice(s)/Credit Note(s) awaiting your approval
4. Approve/Reject eInvoice(s)/Credit Note(s)

1. Email alert

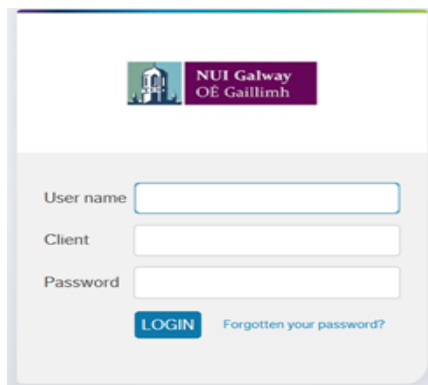
P2P email alerts are sent every morning from agresso55@nuigalway.ie “Agresso System” containing the subject **P2P – INVOICE/CREDIT NOTE APPROVAL ALERT** informing you that you have eInvoice(s)/Credit Note(s) awaiting your attention. You will continue receiving the alert each day until the eInvoice/Credit Note is approved.

2. Logon to Agresso

- a) Click on the Agresso icon on the [P2P webpage](#)



- b) At the login screen enter the following details and click on **Login**:



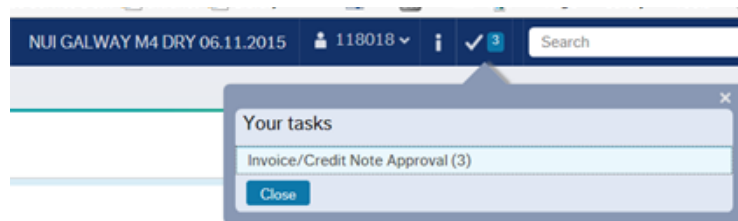
User name: Enter your six digit payroll number

Client: Enter **U1**

Password: Enter your Agresso password

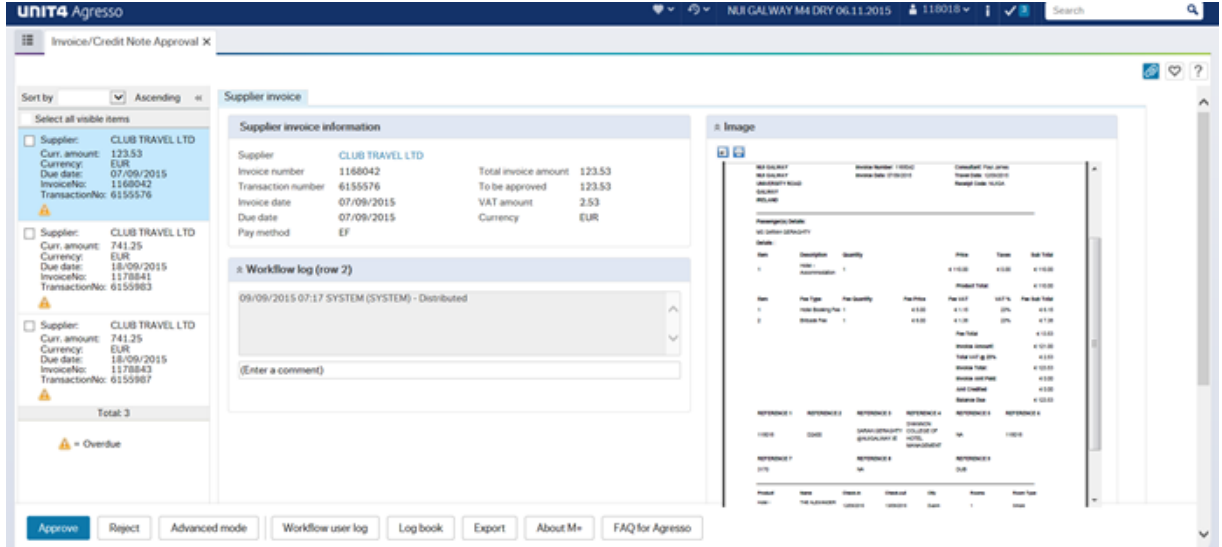
3. Review the eInvoice(s)/Credit Note(s) awaiting your approval

- a) Click on the **Invoice/Credit Note Approval** task which will appear under **Your tasks** → (top right hand corner). The number in brackets e.g. (3) indicates that the number of tasks the approver has to approve.

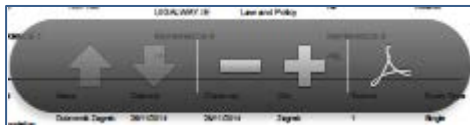



- b) The eInvoice(s)/Credit Note(s) will be displayed on the **Invoice/Credit Note approval** screen.
- c) Click on the chevron icon << to get a fuller view of the screen.

- d) Click on the relevant box to review the invoice/Credit Note. The active box is shaded in a light blue colour. This will display (1) invoice information, (2) workflow log (3) invoice image and (4) invoice details on the screen. The workflow log will display the date, time and name of any person who has already approved the eInvoice/Credit Note e.g. Booker



- e) Hover over the image to get zoom in + and zoom out – options.




- f) Click on the icon  above the image to hide/open the image of the Invoice/Credit Note. Hover over the image to print or save the image.

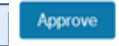




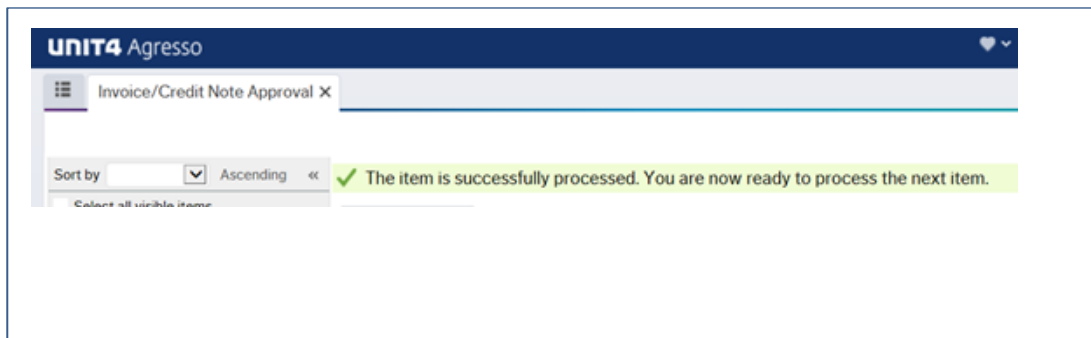
4. Approve/Reject eInvoice(s)/Credit Note(s)

a) To **APPROVE** eInvoice(s)/Credit Note(s)

Single eInvoice/Credit Note: - Click on the  button.


Multiple eInvoice(s)/Credit Note(s): - Check the eInvoice/Credit Note checkbox and then click the  button.

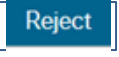
A confirmation message will display when the eInvoice(s)/Credit Note(s) are successfully approved and they will no longer be in your task list.




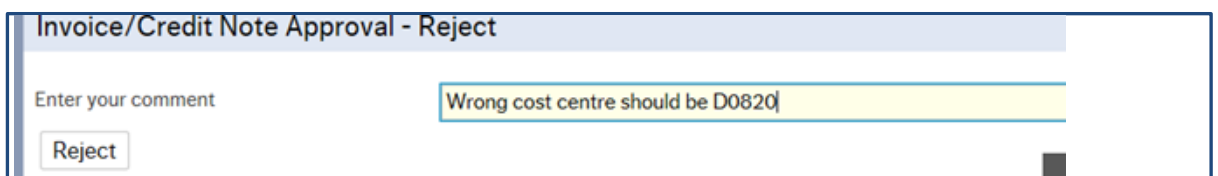
The Budget Holder will receive an email alert the next day informing him/her that they have eInvoice(s)/Credit Note(s) awaiting their attention. If the Booker is also the Budget Holder then the eInvoice(s)/Credit Note(s) are fully approved and will be paid in the next payment run.

b) To **REJECT** eInvoice(s)/Credit Note(s)

Single eInvoice/Credit Note: - Click on the  button.

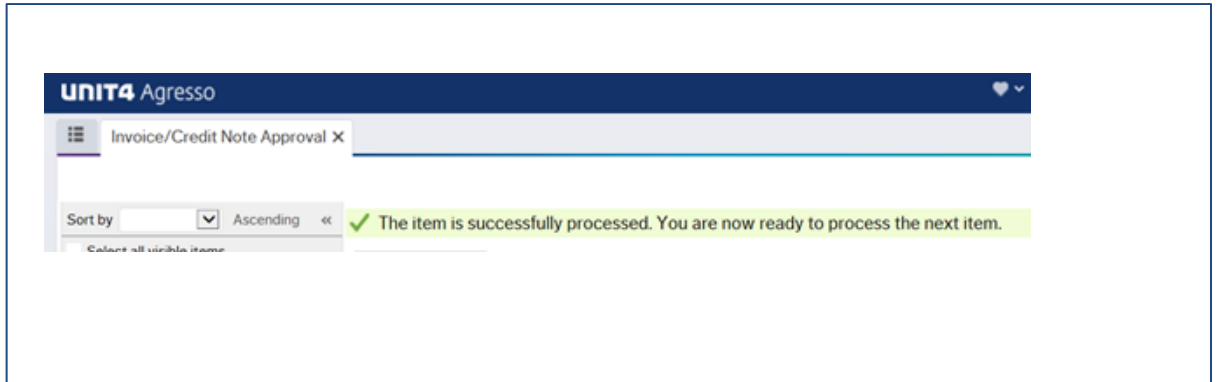
Multiple eInvoice(s)/Credit Note(s): - Check the eInvoice/Credit Note checkbox and then click the  button.

Rejection Comment: - A Rejection Comment must be entered in **all** cases which will inform Accounts Payable why the eInvoice/Credit Note was rejected. Enter appropriate details in the comment box and then click on the  button.





A confirmation message will display when the eInvoice(s)/Credit Note(s) are successfully rejected and they will no longer be in your task list.



Accounts Payable will receive an email alert the next day informing them that the eInvoice(s)/Credit Note(s) were rejected. The eInvoice(s)/Credit Note(s) will be amended by Accounts Payable and then submitted back into workflow. The Booker will receive an email alert notifying him/her that the amended eInvoice(s)/Credit Note(s) are awaiting their attention.

eInvoice(s)/Credit Note(s) should only be rejected in the following circumstances:

- a) Incorrect Cost Centre*
- b) Incorrect Expense Code e.g. should be Triennial Travel Grant (Expense Code – 3171) instead of Travel and Subsistence (Expense Code – 3170)*
- c) Booking was not made by you.*

Further Information
P2P Webpage
P2P FAQ's
Email: p2p@nuigalway.ie