Purchase Invoice Inbox

Module Guide: Purchase Invoice Inbox

Module Location

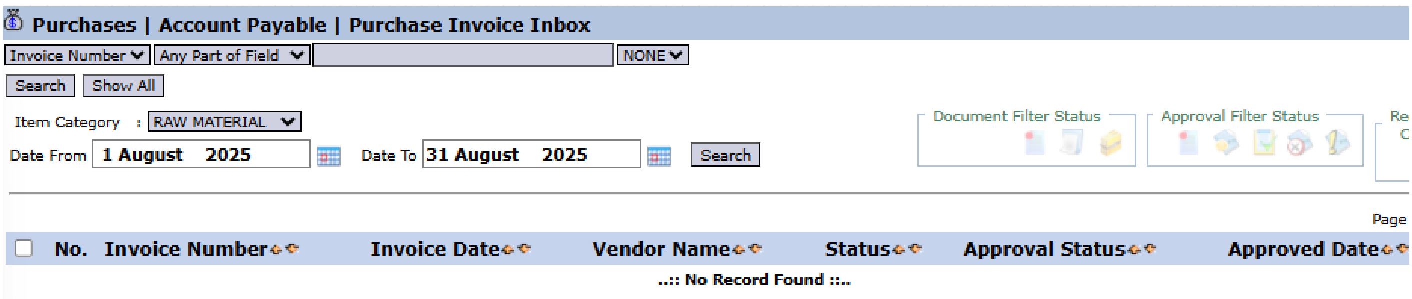
Purchasing > Purchase Invoice > Purchase Invoice Inbox

Module Objective

The **Purchase Invoice Inbox** module serves as the approval center for all **Purchase Invoice** documents that have been input and submitted. This module is used by a superior or manager to conduct a final review and provide approval before a vendor's invoice is officially recorded as an accounts payable.

1. Main View (Invoice List)

The main page of this module is an "inbox" that displays all Purchase Invoices requiring your action.



View Explanation & Filters

This page provides a summary of all invoices that are awaiting approval.

- **Filters**: You can search for a specific invoice by **Invoice Number**, **Item Category**, or a date range (**Date From / Date**

To).

- **Request List**: The table below will display all invoices awaiting action. The table currently shows "...No Record Found...".

Column Explanation

- **Invoice Number**: The unique number of the submitted Purchase Invoice document.

- **Invoice Date**: The date the invoice was created.

- **Vendor Name**: The name of the supplier associated with the invoice.

- **Status / Approval Status**: Icons that indicate the document's status and the approval process status.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Purchase Invoice Inbox** module to see the list of invoices that require approval.

Step 2: Review the Invoice Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input and match it with supporting documents like the **Purchase Order** and the **Goods Receipt Note**.

Step 3: Provide Approval

After you open and review the invoice details in Step 2, you will find the buttons to grant approval (e.g., **"Approve"** or **"Reject"** buttons) **within that detail page**. Click the appropriate button to complete the review process.

3. Workflow & Integrated Business Process

1. **Submission**: A user (e.g., an AP staff) creates an entry in the **Purchase Invoice** module and clicks **[Confirm]**.

2. **Entering the Queue**: The confirmed invoice automatically enters the queue in this **Purchase Invoice Inbox** module.

3. **Review & Approval**: A manager or approver opens this module, reviews, and provides approval.

4. **Finalizing the Payable**: After approval, the invoice becomes a legitimate and official accounts payable, is recorded in the **Accounts Payable Ledger**, and is ready to be scheduled in the payment process.

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