Approving an Invoice

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Overview

This article will discuss how to approve an invoice in Cumulus.

What It Means to Approve an Invoice

When an invoice is first created in Cumulus, the invoice is created in a *pending* status. This status means that the invoice has not been seen by the customer and cardlines can be updated, deleted, created or allocated to the invoice.

Approving an invoice in Cumulus is to lock the invoice in stone. Approving it will:

- Save the invoice in the Ledger Journal
- Set the Invoice status to *Approved*
- Mark the invoice as paid automatically if the Autopay attribute is enabled.

Once an invoice is approved, it cannot be modified unless you then *unapprove* the invoice and re-issue it.

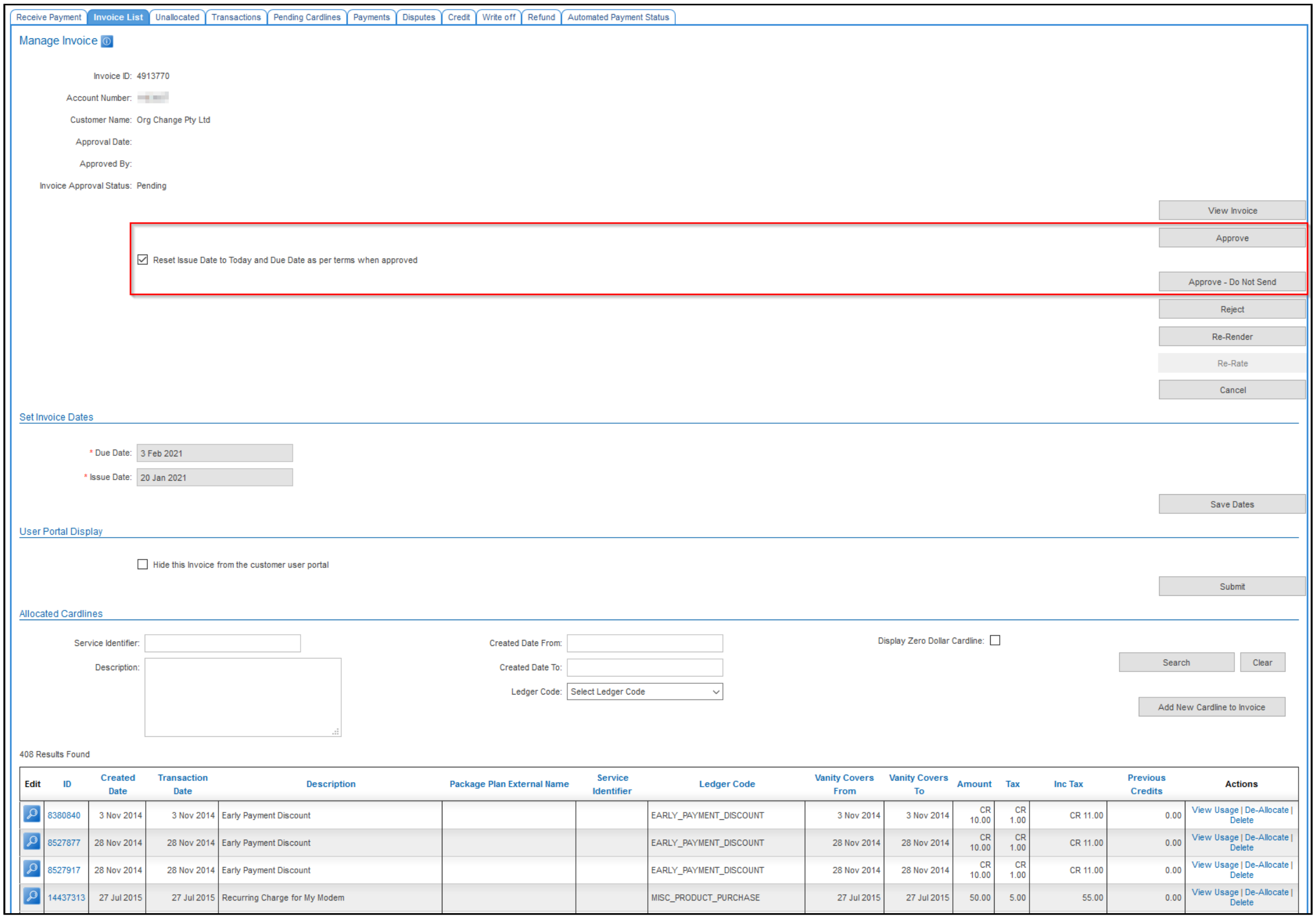
Approved Vs Approved Do Not Send

An invoice that is *Approved* is one that has been saved to the journal and whose status is *Approved*. Cumulus will also attempt to send the invoice to the customer if the Invoice Delivery event is enabled.

If the invoice is to be approved, but does not need to be sent to the client, use the *Approve Do Not Send* button.

Approving a Single Invoice

To approve a single invoice, navigate to the Manage Invoice page.



On the right hand side of the page, click on **Approve**. To approve the invoice, but not send it to the client, click **Approve Do Not Send**.

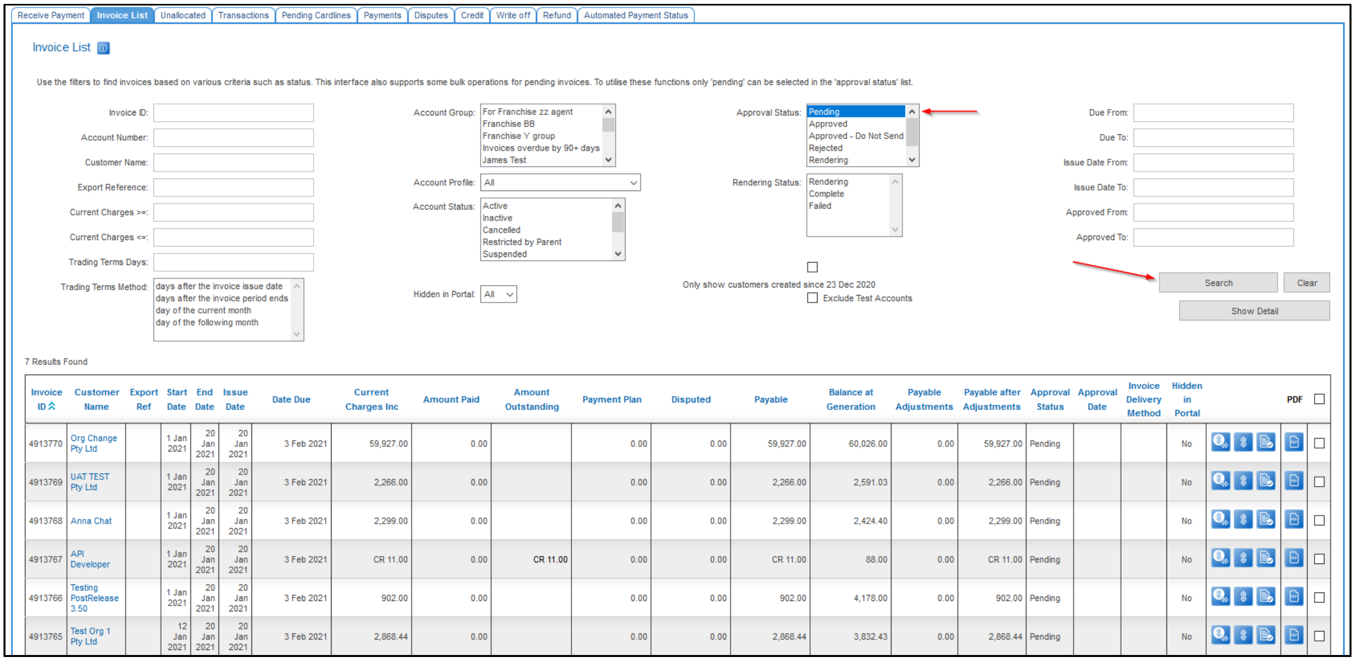
Adjusting Invoice Dates

If the **Reset Issue Date to Today and Due Date as per terms when Approved** checkbox is selected, the system will automatically update the invoice issue date to be today's date and the due date as per the customer's trading terms when the invoice is approved.

The *invoice issue* and *invoice due date* can be set manually on the **Manage Invoice** screen under the *Set Invoice Dates* section

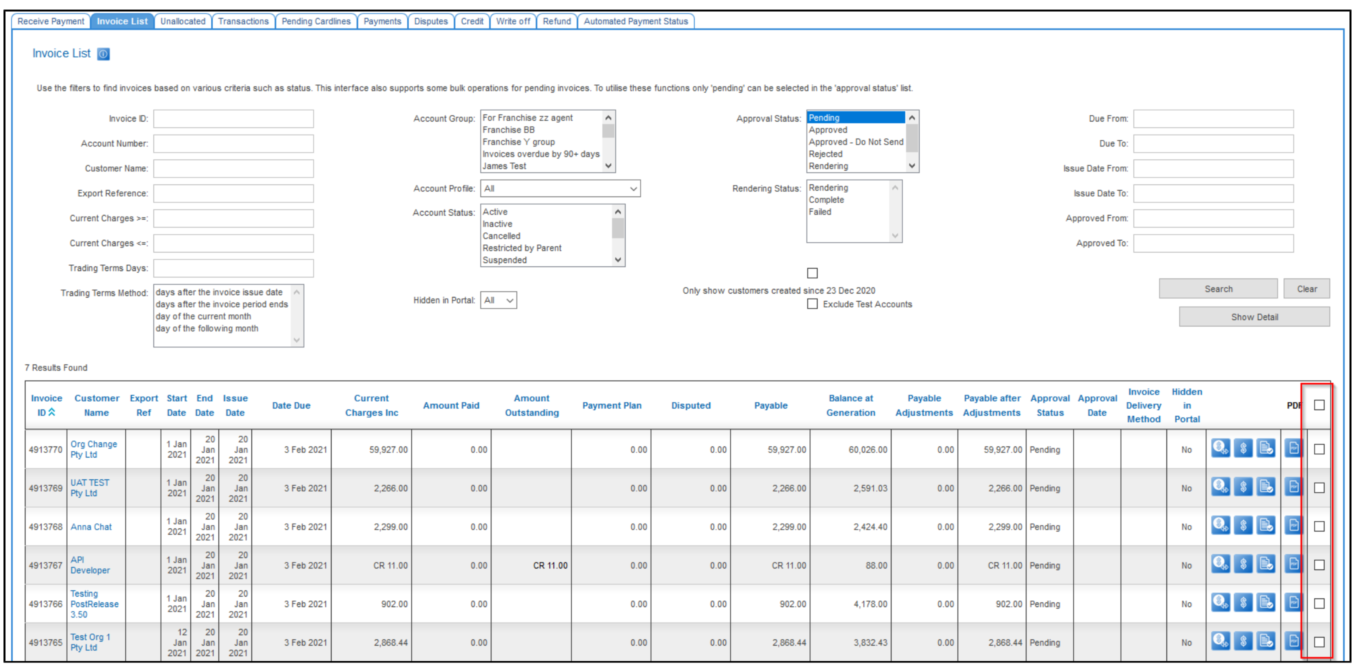
Approving Multiple Invoices

To approve multiple invoices at a time, navigate to the **Finance > Accounts Receivable > Invoice List** page.



On this page, ensure that in the *Approval Status* multi-selection box, only *Pending* is highlighted.

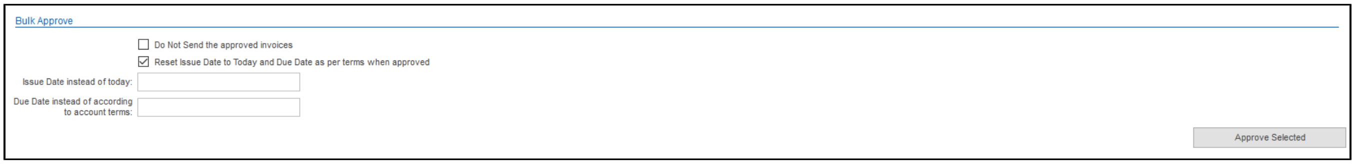
This search criteria can be mixed with other criteria. For example. It is possible to search for invoices that are *Pending* and belong to a specific account group.



Once the search completes, tick the boxes on the far right hand side of the invoices that require approval.

Scroll down to the *Bulk Approve* section.

To select all visible invoices, click the checkbox that appears at the very top of the list in the heading.



To reset the invoice issue and due dates on all selected invoices, tick **Reset Issue Date to Today and Due Date as per terms when approved**.

To approve the invoices, but not send them to the client, tick **Do Not Send the approved invoices** before clicking **Approve Selected**.

Related Pages

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- Approving an Invoice
- Acceptance Testing: Payment Extensions
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- Payment Extensions Fundamentals