

Approving an Invoice

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Overview

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

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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.

Receive Payment

Invoice List

Unallocated

Transactions

Pending Cardlines

Payments

Disputes

Credit

Write off

Refund

Automated Payment Status

Manage Invoice

Invoice ID: 4913770

Account Number:

Customer Name: Org Change Pty Ltd

Approval Date:

Approved By:

Invoice Approval Status: Pending

View Invoice

Approve

Approve - Do Not Send

Reject

Re-Render

Re-Rate

Cancel

☒ Reset Issue Date to Today and Due Date as per terms when approved

Set Invoice Dates

Due Date: 3 Feb 2021

Issue Date: 20 Jan 2021

Save Dates

User Portal Display

☐ Hide this Invoice from the customer user portal

Submit

Allocated Cardlines

Service Identifier:

Created Date From:

Display Zero Dollar Cardline:

Description:

Created Date To:

Ledger Code:

Select Ledger Code

Search

Clear

Add New Cardline to Invoice

408 Results Found

Edit	ID	Created Date	Transaction Date	Description	Package Plan External Name	Service Identifier	Ledger Code	Vanity Covers From	Vanity Covers To	Amount	Tax	Inc Tax	Previous Credits	Actions
	8380840	3 Nov 2014	3 Nov 2014	Early Payment Discount			EARLY_PAYMENT_DISCOUNT	3 Nov 2014	3 Nov 2014	CR 10.00	CR 1.00	CR 11.00	0.00	View Usage De-Allocate Delete
	8527877	28 Nov 2014	28 Nov 2014	Early Payment Discount			EARLY_PAYMENT_DISCOUNT	28 Nov 2014	28 Nov 2014	CR 10.00	CR 1.00	CR 11.00	0.00	View Usage De-Allocate Delete
	8527917	28 Nov 2014	28 Nov 2014	Early Payment Discount			EARLY_PAYMENT_DISCOUNT	28 Nov 2014	28 Nov 2014	CR 10.00	CR 1.00	CR 11.00	0.00	View Usage De-Allocate Delete
	14437313	27 Jul 2015	27 Jul 2015	Recurring Charge for My Modem			MISC_PRODUCT_PURCHASE	27 Jul 2015	27 Jul 2015	50.00	5.00	55.00	0.00	View Usage De-Allocate Delete

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.

Receive Payment **Invoice List** Unallocated Transactions Pending Cardlines Payments Disputes Credit Write off Refund Automated Payment Status

Invoice List 10

Use the filters to find invoices based on various criteria such as status. This interface also supports some bulk operations for pending invoices. To utilise these functions only 'pending' can be selected in the 'approval status' list.

Invoice ID: Account Group: Approval Status: Due From:
 Account Number: Franchise 00 Franchise Y group Invoices overdue by 90+ days James Test Approved - Do Not Send Due To:
 Customer Name: Account Profile: Rendering Status: Issue Date From:
 Export Reference: Account Status: Complete Issue Date To:
 Current Charges >>: Canceled Restricted by Parent Approved From:
 Current Charges <<: Suspended Approved To:
 Trading Terms Days: Hidden in Portal: ☐ Only show customers created since 23 Dec 2020 ☐ Exclude Test Accounts Search Clear
 Trading Terms Method: Show Detail

7 Results Found

Invoice ID	Customer Name	Export Ref	Start Date	End Date	Issue Date	Date Due	Current Charges Inc	Amount Paid	Amount Outstanding	Payment Plan	Disputed	Payable	Balance at Generation	Payable Adjustments	Payable after Adjustments	Approval Status	Approval Date	Invoice Delivery Method	Hidden in Portal	PDF
4913770	Org Change Pty Ltd		1 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	59,927.00	0.00		0.00	0.00	59,927.00	60,026.00	0.00	59,927.00	Pending			No	☐
4913769	UAT TEST Pty Ltd		1 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	2,266.00	0.00		0.00	0.00	2,266.00	2,591.03	0.00	2,266.00	Pending			No	☐
4913768	Anna Chat		1 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	2,299.00	0.00		0.00	0.00	2,299.00	2,424.40	0.00	2,299.00	Pending			No	☐
4913767	API Developer		1 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	CR 11.00	0.00	CR 11.00	0.00	0.00	CR 11.00	88.00	0.00	CR 11.00	Pending			No	☐
4913766	Testing PostRelease 3.50		1 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	902.00	0.00		0.00	0.00	902.00	4,178.00	0.00	902.00	Pending			No	☐
4913765	Test Org 1 Pty Ltd		12 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	2,868.44	0.00		0.00	0.00	2,868.44	3,832.43	0.00	2,868.44	Pending			No	☐

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.

Receive Payment **Invoice List** Unallocated Transactions Pending Cardlines Payments Disputes Credit Write off Refund Automated Payment Status

Invoice List 10

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Invoice ID: Account Group: Approval Status: Due From:
 Account Number: Franchise 00 Franchise Y group Invoices overdue by 90+ days James Test Approved - Do Not Send Due To:
 Customer Name: Account Profile: Rendering Status: Issue Date From:
 Export Reference: Account Status: Complete Issue Date To:
 Current Charges >>: Canceled Restricted by Parent Approved From:
 Current Charges <<: Suspended Approved To:
 Trading Terms Days: Hidden in Portal: ☐ Only show customers created since 23 Dec 2020 ☐ Exclude Test Accounts Search Clear
 Trading Terms Method: Show Detail

7 Results Found

Invoice ID	Customer Name	Export Ref	Start Date	End Date	Issue Date	Date Due	Current Charges Inc	Amount Paid	Amount Outstanding	Payment Plan	Disputed	Payable	Balance at Generation	Payable Adjustments	Payable after Adjustments	Approval Status	Approval Date	Invoice Delivery Method	Hidden in Portal	PDF
4913770	Org Change Pty Ltd		1 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	59,927.00	0.00		0.00	0.00	59,927.00	60,026.00	0.00	59,927.00	Pending			No	☐
4913769	UAT TEST Pty Ltd		1 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	2,266.00	0.00		0.00	0.00	2,266.00	2,591.03	0.00	2,266.00	Pending			No	☐
4913768	Anna Chat		1 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	2,299.00	0.00		0.00	0.00	2,299.00	2,424.40	0.00	2,299.00	Pending			No	☐
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4913766	Testing PostRelease 3.50		1 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	902.00	0.00		0.00	0.00	902.00	4,178.00	0.00	902.00	Pending			No	☐
4913765	Test Org 1 Pty Ltd		12 Jan 2021	20 Jan 2021	20 Jan 2021	3 Feb 2021	2,868.44	0.00		0.00	0.00	2,868.44	3,832.43	0.00	2,868.44	Pending			No	☐

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.

Bulk Approve

☐ Do Not Send the approved invoices

☒ Reset Issue Date to Today and Due Date as per terms when approved

Issue Date instead of today:

Due Date instead of according to account terms:

Approve Selected

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

- [Re-Rate Invoice](#)
- [Unapproving Invoice](#)
- [Payment Extensions](#)
- [Rejecting an Invoice](#)
- [Approving an Invoice](#)
- [Acceptance Testing: Payment Extensions](#)
- [Grant a Payment Extension](#)
- [Payment Extensions Fundamentals](#)