Unapproving Invoice

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Overview

Unapproval is the process of removing the invoice from The Ledger Journal and resetting its status back to *Pending*.

> Check your state and federal laws, statutory and regulatory requirements before using the *Unapprove Invoice* feature. Emersion is not liable for decisions by service providers to use this feature when it is inappropriate to do so.
>
> Emersion recommends that this function's use is limited to a scenario when invoice is **not sent** to customer and **not sent** to another system.

> Emersion recommends using the Invoice Rebilling feature instead of unapproving an invoice.

> If your account has Multiple Pending Invoices enabled, then your system behaviour may be different in regards to pending invoices and cardlines. Please see this article for more information.

Conditions of Use

An invoice can only be unapproved under the following circumstances:

- The invoice must be *Approved* or *Approved Do Not Send.*
- The invoice is the most recently approved invoice on the account.
- The account cannot have a current pending invoice. If multiple pending invoices is enabled, your system behaviour may be different.
- The invoice has never been disputed, and therefore has no active, withdrawn or completed disputes.
- The invoice does not have any cardlines attached to it that are connected to commissions in anyway.
- The invoice has not been integrated into an external system, such as Xero or ConnectWise.
- There are no account level debits or credits assigned to the invoice (an exception is a credit generated from a previous credit invoice).
- The invoice is not bound to an "approved" collective invoice.

If the invoice is later approved, it will be resent if required.

If the account has a pending invoice and you need it removed, please contact Emersion to request the removal of the invoice. Removing a pending invoice from the system is a subject to a consulting fee.

Collective Invoices

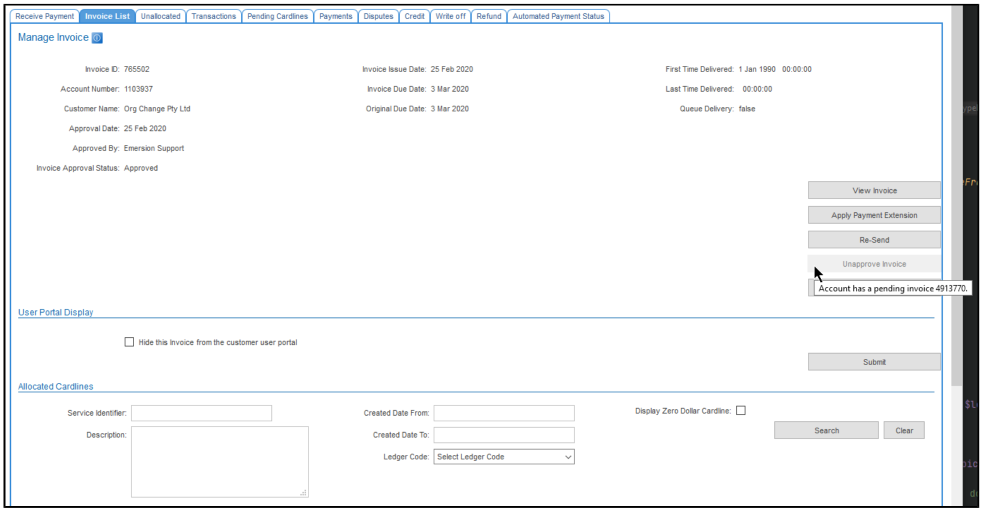
- During unapproval of a collective invoice, it will be possible to also unapprove any attached child invoices.
- Any allocated payments will be unallocated from the invoice, and if nothing is outstanding, will remain as an unallocated payment on the account. Be mindful that if other invoices on the account are outstanding, and the auto allocate payments setting on the account is enabled, the payment will be allocated to those invoices instead.

Required Powers

Power name	Parent Powers	Description
Ability to unapprove an invoice	Customer Management > Finance > Manage Invoice	Grants access to revert the approval of an invoice and return it to a *Pending* state, under limited circumstances.
Ability to unapprove collective invoice	Customer Management > Finance > Manage Invoice	Grants access to revert the approval of an invoice and return it to a *Pending* state, under limited circumstances.

Unapprove an Invoice

To unapprove an invoice, navigate to the Manage Invoice page.



Click **Unapprove Invoice** to unapprove the invoice. If the button is greyed out, as it is in the screenshot above, hover the mouse over the button to see why it cannot be unapproved.

Related Pages

- Invoice Rebilling
- Invoice Rebilling Fundamentals
- Rebill an Invoice
- Re-Rate Invoice
- Unapproving Invoice
- Payment Extensions
- Rejecting an Invoice
- Approving an Invoice
- Acceptance Testing: Payment Extensions
- Grant a Payment Extension
- Payment Extensions Fundamentals