

List Unapproved Invoices Introduction

To view any Invoices that are currently awaiting review or require amendments, click the Invoice tab and select the "List Unapproved Invoices" option.

1. Upon clicking the "List Unapproved Invoices" option, the Unapproved Electronic Invoices list appears. This will show all Invoices that have been created for a given Resource but haven't been approved yet. The Invoice Number, Total and Status are some of the details that are displayed, as well as the last notes added by reviewers of the Invoices. Selecting an Invoice will display the View Invoice screen.

Invoices [Unapproved Invoices] Refresh												Filter...	Exp
Total: 29												Show 10 , 15 , 25 , 50 , 75 , 100 per p	
Invoice Number	Status	Invoice Date	Job No	Resource	Building Name	Client	Net Value	VAT	Total	Unapproved Reasons	Last Action By	Last Action Date	Last Action Notes
079777	Pending Review	11/07/2013	6738168	Ostara Contractor Ltd	(00006) Tower Bridge Demo	Ostara Demo	47.40	9.48	56.88	Invoice varies to the pre-agreed cost	AS PL Clerk 4	12/08/2013 14:35:38	
123456	Pending Review	27/05/2016	7610028	Ostara Contractor Ltd	(00006) Tower Bridge Demo	Ostara Demo	1,040.00	208.00	1,248.00	Attendance cost query, Parts cost query, Time on site cost query	Ostara System	07/06/2021 22:30:08	

2. On the View Invoice screen, the Invoice details are displayed. This provides the ability to edit the existing details of the Invoice or to view the uploaded Invoice and Worksheet files. This screen also shows a History of what has happened on the Invoice, who performed the action and when it occurred. It also display any Notes added when these actions occurred which can be viewed in more detail by clicking the Notes.

To view the uploaded files on the Invoice, click the "View" button next to the relevant document. If any of these details need changing then click the "Edit" button. Editing an Invoice is shown below.

Actions

or

Edit

Delete

View Invoice

TypeInvoice

Work Order Number7610028

Document	Type
example	Invoice & Worksheet

View

Date Submitted27/05/2016

Invoice Number123456

Tax Point27/05/2016

Call Out Fee40.00

Time on Site Cost500.00

Labour Cost540.00

Parts Cost500.00

Plant/Equip/Misc Cost0.00

Net1,040.00

Tax208.00

Gross1,248.00

Unapproved Reason(s)

Attendance cost query

Parts cost query

Time on site cost query

History

Unapproved ReasonsOstara System

ChangedBirmingham helpdesk

UnapprovedBirmingham helpdesk

CreatedBirmingham helpdesk

07/06/2021 22:30

27/05/2016 16:11

27/05/2016 16:11

27/05/2016 16:11

Note: If the Invoice needs deleting, please see the [Deleting an Invoice](#) page.

3. When editing an Invoice, each of the Cost fields (and Invoice notes field) will be editable whilst the Date Submitted, Invoice Number and Tax Point cannot be modified. It is also possible to remove any uploaded documents and add in new documents. Once all the necessary changes have been made, click the "Submit" button to save them and re-submit the Invoice for approval.

Note: If the Invoice being viewed was rejected by the approver, the "Unapproved Reason(s)" will be displayed along with the Invoice details. If one of these Reasons is "Same day visit - not expecting attendance cost", the system will also display the Work Orders that clash with this Invoice. Before the Invoice can be re-submitted, the User is required to resolve the "Unapproved Reason(s)" otherwise they will be unable to submit the Invoice again.

Once the "Unapproved Reason(s)" has been resolved and the Invoice is re-submitted, the Status of the Invoice changes from "Rejected" to "Pending Review".

Note: If an Invoice has been rejected, there will also be note relating to why it was rejected in the Rejection Notes field. There is also a message that will be displayed explaining what the Resource can to resolve this.

Edit Invoice

Type: Invoice
Work Order Number: 7610028

Upload Invoice/Worksheet(s)...

Document	Type
example	Invoice & Worksheet

Date Submitted: 27/05/2016
Invoice Number: 123456
Tax Point: 27/05/2016
Call Out Fee: 40.00
Time on Site Cost: 500.00
Labour Cost: 540.00
Parts Cost: 500.00
Plant/Equip/Misc Cost: 0.00
Net: 1,040.00
Tax: 208.00 (Standard 20 %)
Gross: 1,248.00
Notes:

Submit Cancel

Attendances

Start Date	End Date	Attendance Duration	Attendees
27/05/2016 15:56	27/05/2016 16:02		1

Tick the attendance(s) you wish to associate with this invoice or tick below

☐ This invoice is for an attendance that is not listed (NOTE: The system will be unable to validate costs and could leave the invoice in an unapproved state)

[Deleting an Invoice](#)

[View Invoice - Google Chrome pane](#)

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=558>