## List Unapproved Invoices Introduction

## 🛗 Fri, Jan 19, 2024 🛛 🖿 List Unapproved Invoices

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 (Unapprov	voices (Unapproved Invoices)   <u>Refresh</u>												
Total: 29						1 2						Show 10 , 15 , 2	5 , 50 , 75 , 100 per p
Invoice Number	<ul> <li>Status</li> </ul>	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	AB 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.

Invoices > View Invoice	>						
Actions «	View Invoice				History		
	Type	Unapproved Reasons Ostara System		07/06/2021 22:30			
	Work Order Number	7610028			Unapproved Created	Birmingham Helpdesk Birmingham Helpdesk	27/05/2016 16:11 27/05/2016 16:11
Edit		Document	Туре				
		example	Invoice & Worksheet	View			
	Date Submitted	27/05/2016					
Delete	Invoice Number	123456 🕕					
	Tax Point						
	Call Out Fee						
	Time on Site Cost						
	Labour Cost						
	Parts Cost	500.00 👽					
	Plant/Equip/Wilse Cost	1.040.00					
	Tay	200.00					
	104	208.00					
	Gross	1,248.00					
	Unsurround Dessen(s)	- Attendence cost avera					
	Unapproved Reason(s)	Attendance cost query     Parts cost query					
		<ul> <li>Time on site cost query</li> </ul>					
	1						

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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.

t Invoice									
				I					
Type	e Invoice			Atten	ndances				
work Order Numbe	F 7610028					27/05/2016 15:56	27/05/2016 16:02		1
						Tick the attendance(s) you	wish to associate with this inv	oice or tick below	
	Upload Invoice/Worksheet(s)								
	Document	Туре				This invoice is for an at the invoice in an upapprovi	tendance that is not listed (NC ad state)	TE: The system will be unable	to validate costs and could le
	example	Invoice & Worksheet	Remove			the invoice in an unapprovi	ed state)		
Date Submitter	27/05/2016								
Invoice Numbe	r 123456 🕕								
Tax Point	t 27/05/2016 🕕								
Call Out Fee	e 40.00 🕕								
Time on Site Cos	t 500.00 🕕								
Labour Cos	t 540.00								
Parts Cos	t 500.00 🕕								
Plant/Equip/Misc Cos	t 0.00 🚯								
Ne	t 1,040.00								
Tax	x 208.00 Standard 20 % 🗸 🌖								
Gros	1 349 00								
0105	· 1/2-10:00								
Note									
not.	-								
Submit Cancel									

Deleting an Invoice View Invoice - Google Chrome pane

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