Welcome to The River

LET BUSINESS FLOW

INTRODUCTION

Creating, Submitting and Approving Invoices covers how to log in and create, submit and approve invoices in Chrome River. We recommend this training for all INVOICE users.

AGENDA

BEST PRACTICES

- Training Camp Registration Link:
  www.chromeriver.com/training/registration
- Prerequisites: This is the first **INVOICE** training that any user should attend.
- Additional Training: Approvers and Administrators may attend **Configuring Company Settings**.

Logging in during training is not always necessary. Design your training session as either a "Watch and Learn" or "Practice Workshop" style. There are pros and cons to both, dependening on your employees' styles.

CREATING, SUBMITTING AND APPROVING INVOICES

1. HOME BUTTON

The **Home button** returns you to the main page from anywhere in the application. Click on the **CHROMERIVER** logo in the upper left-hand corner of the screen.

2. HELP CENTER

The **Help Center** is the first place to go for questions and tutorials.

3. INVOICE DASHBOARD

- **+New Button**
- On the right is information specific to your organization
- On the left is an overview of **Expense Reports**, **Pre-Approvals** and **Invoices**
  - Shows the number of invoices in Draft and Submitted status

4. CREATING A NEW INVOICE

Click **+New** then **New Invoice**.

- Under the **ellipses**
  - **Prior Invoices**: Allows you to search and access prior invoices from a specific vendor. You can view the invoice history for a vendor to avoid processing duplicate invoices. See the **Prior Invoices** topic in the **Help Center** for more details.
  - **Convert to Template**: Allows users to prepopulate and pre-allocate invoices for use across the organization. This helps to keep track of shared expenses that are allocated among multiple departments rather than a single user. See the **Invoice Templates** topic in **the Help Center** for more details.
- **Attachment Section:** Drag and drop or **Select an Invoice Image(s).**

- **OCR Vision** will populate several fields from the **invoice image** into the **Invoice Header** and **Invoice Detail** sections.

- **Special Handling:** Select, check and/or add the appropriate special handling item(s).
- **Comment Section:** Allows additional feedback by approvers during the approval process.
- **+ Add Expense Button:** Allows line items to be added to allocate the total amount of the invoice.

5. INVOICE REVIEW

After selecting an **invoice**, you can click on

- **Images**: Review the **invoice** image or images.
- **PDF**: Review the **invoice** in PDF format with varying degrees of detail.
- **Delete**: You cannot delete an **Invoice** with a status of **Paid** or **Exported.**
- **Edit:** You can **Submit**, **Return** or **Approve Invoices**.
- **Ellipses**
  - **Audit**: Allows auditing of an **Invoice** based on specific fields:
    - Users
    - Header Fields
    - Line Item Fields
  - Convert to Template
    - Can be used to create similar invoices in the future.

6. SUBMITTING AN INVOICE

- **Return**: If you are not the **Invoice Requestor**, the **invoice** will be returned to the requestor identified on the **Invoice Header**. Invoice tracking will mark you as having returned the **invoice.**
- **Return to Other**: The **invoice** will be returned to the person selected from the drop-down menu. Invoice tracking will mark you as having returned the **invoice.**

7. APPROVING AN INVOICE

- **Approve**: **Invoices** can be approved within the Chrome River application or via email. After an **Invoice** has been submitted and routed for approval, it can be approved or returned via the application or via the mobile application.

8. INVOICE CAPTURE

- When vendors send invoices to Chrome River via **CAPTURE**, they are automatically put into the **Invoice Approval Workflow.** The invoices then appear in the **Approvals** ribbon on the Dashboard.

9. INVOICE MANAGEMENT

- Shows all **invoices** with a **Pending** or **Draft** status.
  - Allows **invoices** to be **Edited**, **Assigned**, **Deleted**, **Canceled** or **Downloaded.**

    - **Cancel:** Available for **invoices** in any status except **Draft.**
    - **Delete**: You cannot delete an **invoice** with a status of **Paid** or **Exported**.
- You can search for **invoices** by **Invoice ID** or **Invoice Number** via the search box.
- You can **Create** and **Save** custom searches.

OTHER RESOURCES

- **Live Customers**: Submit a case to the **Help Desk**.
- **Implementation Customers**: Follow up with your **Chrome River Project Manager** or see the **Chrome River Training Camp** website.

NEXT STEPS

After completing this training, here are some additional steps you can take.

- Download the **Chrome River Hybrid Application**. See **Help Center** > **MOBILE** > **Chrome River.**
- Use the **Help Center** to find answers to any questions you come up with.

QUESTIONS

Write down your questions here for our Support Team or your Customer Success Manager.

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