• An email from **accountspayable@messiah.edu** will be received when an invoice requires approval.

• Click on the link to login and review the invoice. (Alternately, login to MC OneSource, then click on tasks icon/invoices at the top of the page in the gray bar.)

Invoice ABC999 has been loaded and assigned to you for approval.
Please login to review the invoice. If accepted, the invoice items will be placed in your cart to create a Retrofit Order for checkout, coding and approval.
Invoice Number ABC999
Supplier xpedx
Creator: Teri Rader

<table>
<thead>
<tr>
<th>Item Code</th>
<th>Qty</th>
<th>Unit Price</th>
<th>UOM</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Fee</td>
<td>MC360</td>
<td>1</td>
<td>$100.00</td>
<td>Each</td>
</tr>
</tbody>
</table>

Please login to review the invoice.

• From the Approve Invoices screen, click on the **invoice number**.
- Note the Supplier.
- Review all Attachments by clicking on the link.
- Review the Description of the items listed along with the quantity, unit price and total.

- Click **Approve/Decline** at the top of the page. To decline the invoice, type a reason for declining in the box and then click **Decline**.
- If approving, a reason is not mandatory but may be entered. Click **Approve**.
- Clicking Approve will place the items into the shopping cart.
- Click **Checkout**.

![Shopping Cart Image](https://example.com/shopping-cart.png)

- The Checkout page is now displayed. Verify that the Ship To information is correct.
- Bill To should default to Accounts Payable. If not, please click on the drop down arrow and make the selection.

![Checkout Image](https://example.com/checkout.png)

- Do **NOT** uncheck the Retrofit Order.
- Related Invoice Number and Order Date are a default, please do not change.
- Order Submission is defaulted to Do Not Send – the PO will not be emailed to the vendor.
• Click on the calendar next to the Delivery Date box to enter an anticipated delivery date. The delivery date is **not** shown to the vendor. (If purchasing more than one item, use the blue down arrow to the right to copy the delivery date down for all other items.)

• In the first box, type the Org. As information is entered, options will appear, click to choose the correct option or continue typing. (The magnifying glass can be used to search.)

• In the second box, type the account code. As information is entered, options will appear, click to choose the correct option or continue typing. (The magnifying glass can be used to search.)

• If applicable, type the activity code in the third box.

• If purchasing more than one item, but allocating all to the same org/account, use the blue down arrow to the right of the account boxes to copy the org/account allocation down for all other items. Make sure each item has the correct org/account/activity code allocation.
• The PO will **not** be sent to the vendor, so there is no need to type Delivery Notes.
• If the invoice is related to a current Blanket Order, click on the down arrow to select the appropriate Blanket Order Number.
• Order Receiving is defaulted to Receive Automatically – items will not have to be received in OneSource. **Do not change.**

![Image of order processing interface](image)

• In the Justification box, give a detailed explanation as to why the purchase is being made. This is important information and necessary for IRS audit purposes.
• If there are any attachments (requests, quotes, emails, etc.), first save as pdf, click on the Add Attachment link in the Justification Attachments. Click Browse and find the appropriate document and Click OK.
• Click **Checkout.**

![Image of Justification section](image)

• Requisition has been completed and will be forwarded through the approval queue.

![Image of requisition form](image)

• Click on the home icon and verify that there is no number next to tasks icon on the gray bar. This verifies that all tasks have been completed.