

# Chrome River Direct Pay Invoice Search Process

## How to Search for Direct Pay Invoices

Chrome River Direct Pay Invoice is a comprehensive, automated invoicing system. This system automates the approval process for direct pay and reimbursement payments.

There are advantages in using the Chrome River Invoice system. Users are able to create direct pay and reimbursement invoices efficiently.

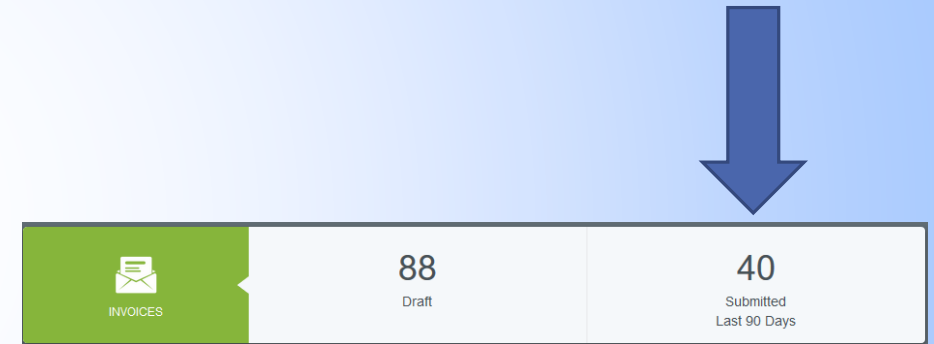
### *Information in this document:*

How to search direct pay invoices

How to search direct pay invoices prior to 90 days

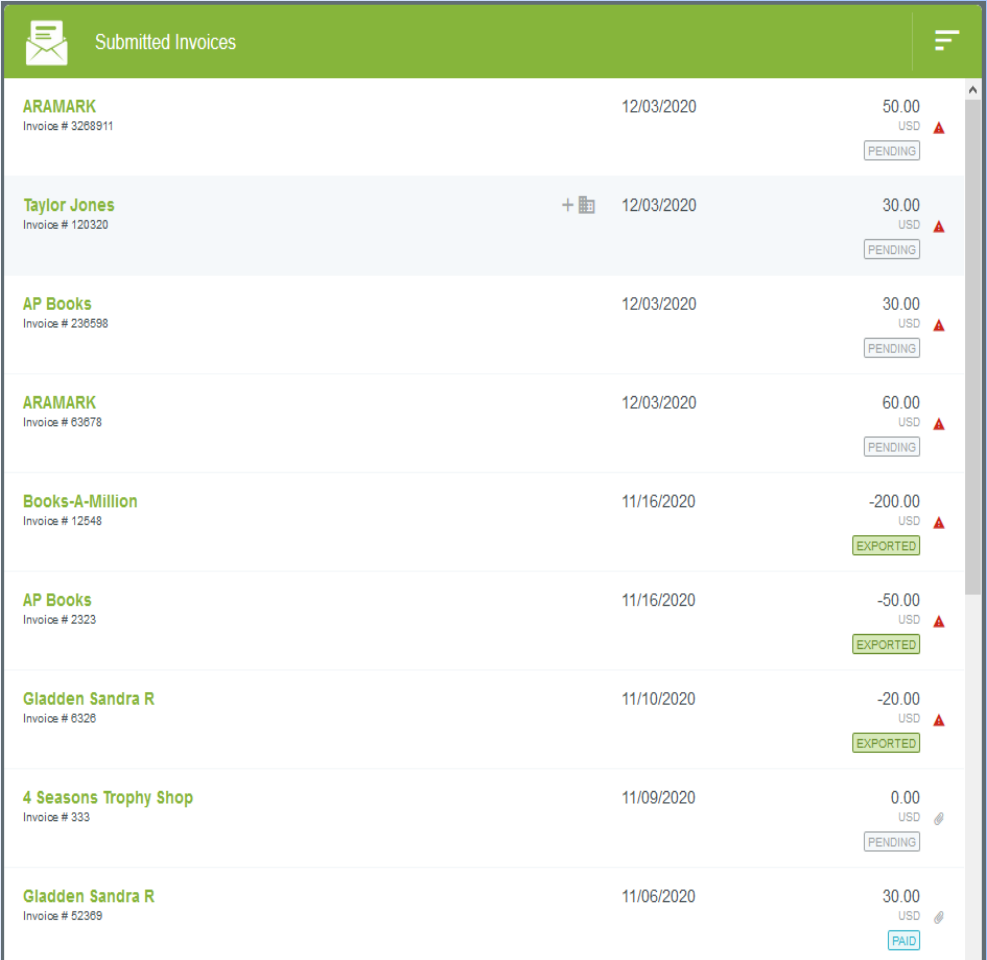
## Invoice Submit Queue

- ▶ Creators are able to search for Direct Pay Invoices within the Invoice Submitted Last 90 Days queue if the invoice falls within that date range.
- ▶ The number reflects the total number of Direct Pay Invoices submitted.
- ▶ Click on queue to review reports.



# Invoice Submit Queue

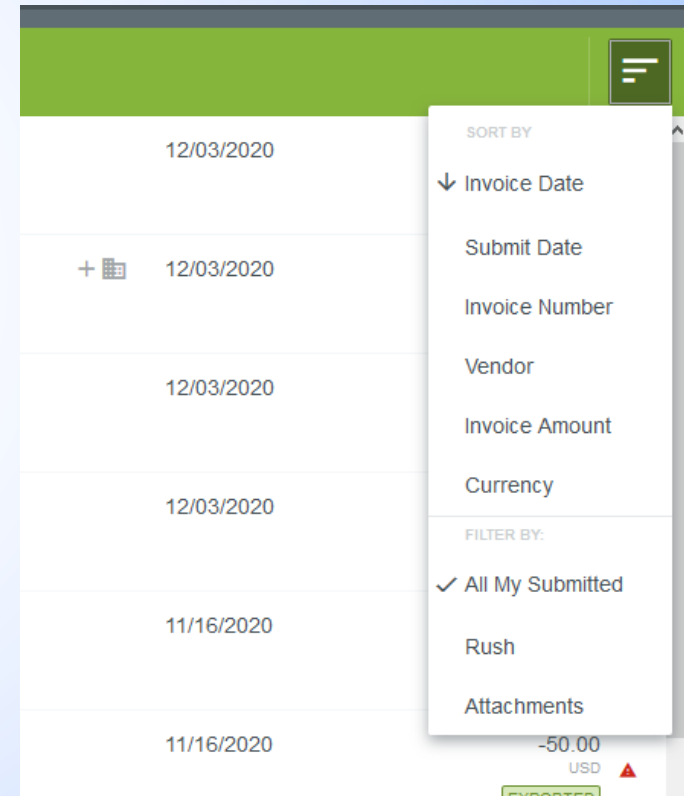
- Submitted Invoices data includes:
  - Vendor Name (Payee)
  - Invoice number
  - Invoice date
  - Invoice Total Amount
  - Invoice Status
  - Attachment/Compliance icons



Vendor Name	Invoice #	Invoice Date	Invoice Total Amount	Invoice Status
ARAMARK	3288911	12/03/2020	50.00 USD	PENDING
Taylor Jones	120320	12/03/2020	30.00 USD	PENDING
AP Books	238698	12/03/2020	30.00 USD	PENDING
ARAMARK	83878	12/03/2020	60.00 USD	PENDING
Books-A-Million	12548	11/16/2020	-200.00 USD	EXPORTED
AP Books	2323	11/16/2020	-50.00 USD	EXPORTED
Gladden Sandra R	8326	11/10/2020	-20.00 USD	EXPORTED
4 Seasons Trophy Shop	333	11/09/2020	0.00 USD	PENDING
Gladden Sandra R	52369	11/06/2020	30.00 USD	PAID

# Invoice Submit Queue

- ▶ Select hamburger menu within the green highlighted bar in order to sort the invoices.
- ▶ Choose the option best to sort the data for your search.
- ▶ Once sorted the user has the option to review the data from newest to oldest or from oldest to newest. Simply click on the same sort option once more to change the data.
- ▶ The arrow points up to reflect oldest to newest and down to reflect newest to oldest.



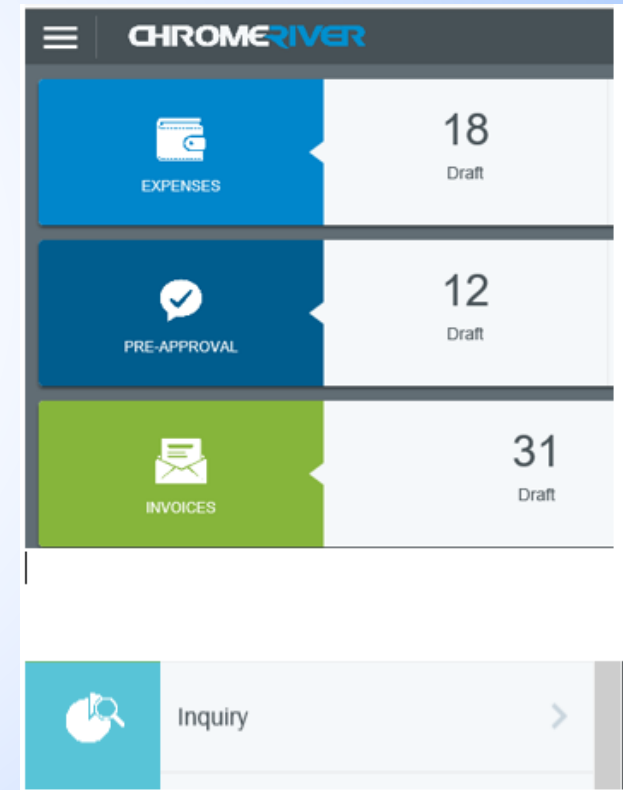


## Inquiry Feature

- ▶ The Inquiry feature is use to search for Direct Pay Invoices prior to the 90 day submitted mark.
- ▶ Some users will find that they prefer to use this feature to search for current Direct Pay Invoices also.
- ▶ Creators are only able search and review Direct Pay Invoices that they created and submitted.
- ▶ Direct Pay Approvers are able to search and review all Direct Pay Invoices that they have approved.

# Inquiry Feature

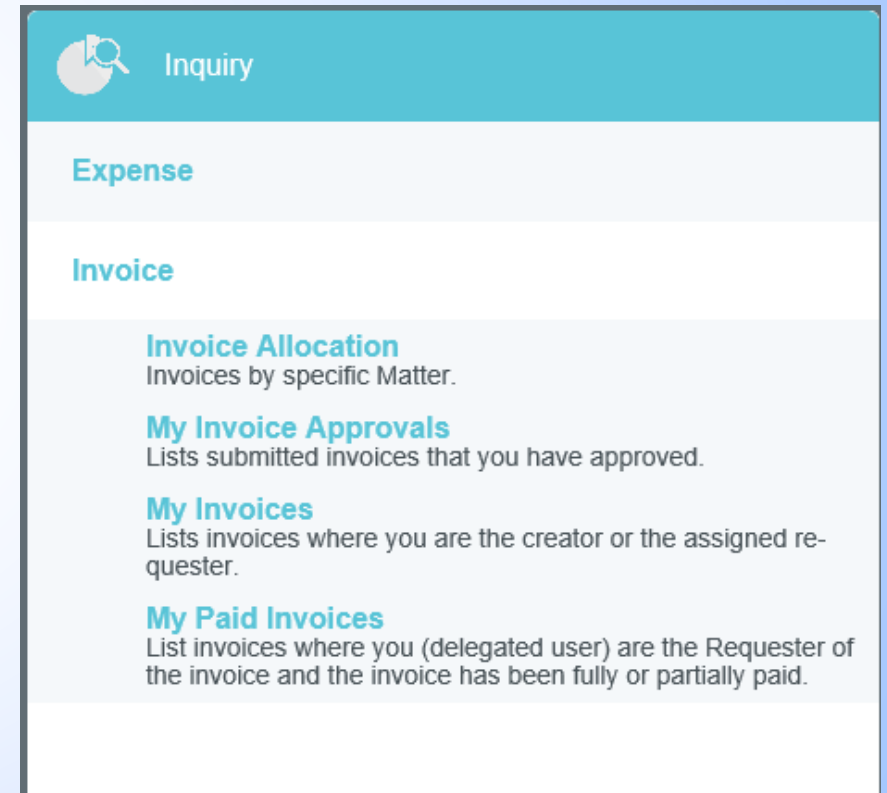
- ▶ Select the hamburger menu at the top left hand corner of the Chrome River home page.
- ▶ In the drop down menu select the Inquiry tab.





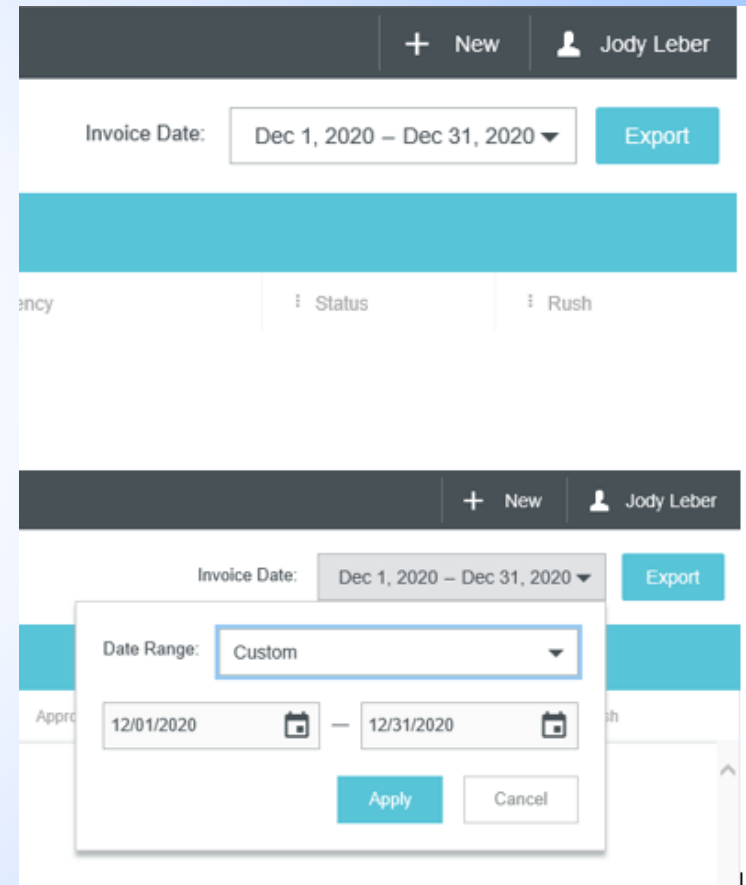
# Inquiry Feature

- Select Invoice to review drop down menu
- Select My Invoices in order to create a search criteria. The data will reflect invoices that were created by the user.
- Approvers will select the My Invoice Approvals in order to search all invoices they have reviewed and approved.



# Inquiry Feature

- ▶ Click on the drop down arrow located in the top right corner to search reports by Invoice Date.
- ▶ Filter the search by Date Range by clicking on the drop down menu.
- ▶ Search Filters include:
  - ▶ Today
  - ▶ This Week
  - ▶ This Month
  - ▶ This Quarter
  - ▶ This Year
  - ▶ Last Month
  - ▶ Last Quarter
  - ▶ Last Year
  - ▶ Year to Date
  - ▶ Custom – add dates into the start and end fields by clicking on the calendar icon.
- ▶ Select Apply once a filter is chosen.





# Inquiry Feature

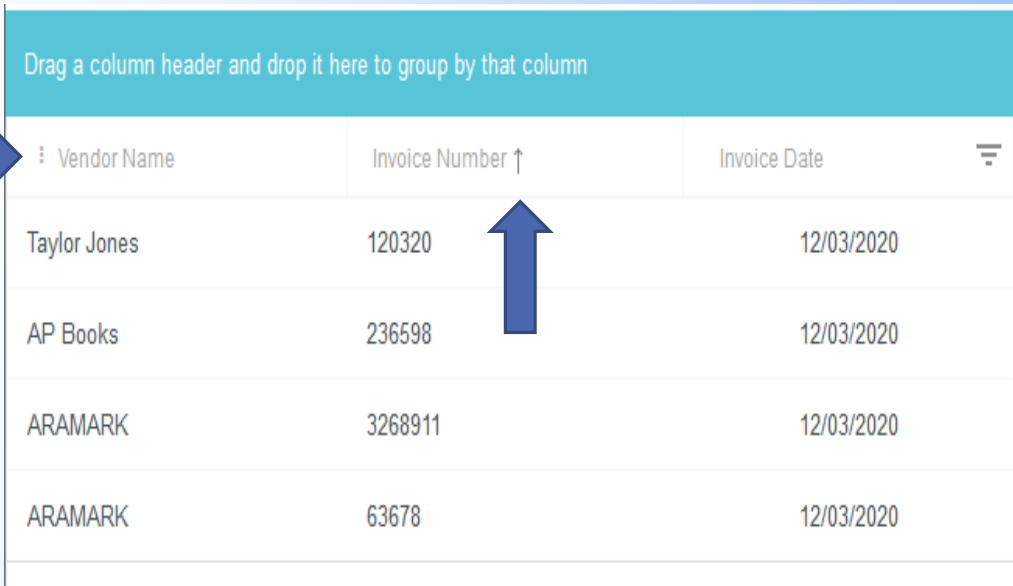
- Direct Pay Invoice data is pulled by desired search.
- Data columns include:
  - Vendor Name – Payee
  - Invoice Number
  - Invoice Date
  - Invoice Amount
  - Approved Currency
  - Status
  - Rush

Drag a column header and drop it here to group by that column

Vendor Name	Invoice Number	Invoice Date	Invoice Amount
ARAMARK	63678	12/03/2020	
ARAMARK	3268911	12/03/2020	
AP Books	236598	12/03/2020	
Taylor Jones	120320	12/03/2020	

## Inquiry Feature

- Users may drag and drop column headers indicated by the three dots onto the teal bar in order to group data by that column.
- Users may sort data by clicking onto the column header.
  - Click on the arrow to switch the data based on the column selected.



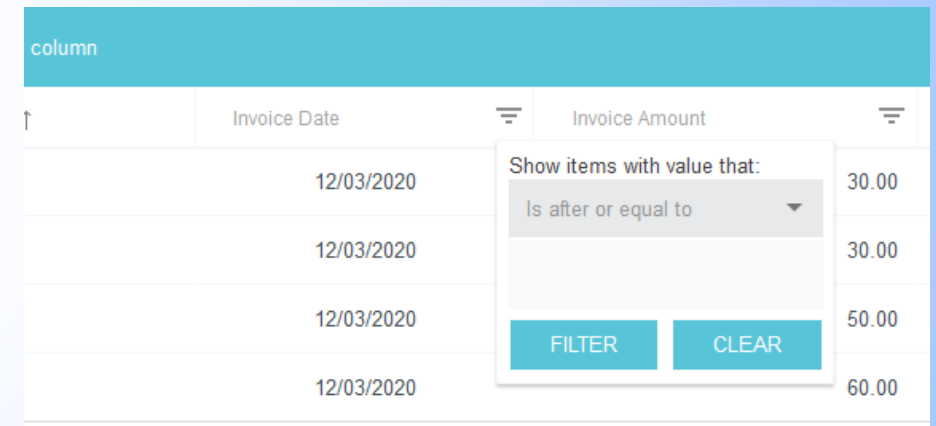
Drag a column header and drop it here to group by that column

Vendor Name	Invoice Number ↑	Invoice Date
Taylor Jones	120320	12/03/2020
AP Books	236598	12/03/2020
ARAMARK	3268911	12/03/2020
ARAMARK	63678	12/03/2020

The screenshot shows a data table with a teal header bar containing the instruction "Drag a column header and drop it here to group by that column". The table has three columns: "Vendor Name", "Invoice Number ↑", and "Invoice Date". The "Invoice Number" column is currently sorted in ascending order, as indicated by the upward arrow. A blue arrow points to the "Invoice Number" column header, and another blue arrow points to the upward arrow in the "Invoice Number" column header.

# Inquiry Feature

- ▶ Users may filter column headers that contain a bar icon.
- ▶ Click on the bar icon in order to enter the filter data.
- ▶ Select the drop down menu to choose how the data needs to be filtered.
- ▶ Select filter.
- ▶ Select Clear in order to remove the filter and review original data.
- ▶ Data may be exported by selecting the Export tab in the top right corner.



The screenshot shows a data table with two columns: 'Invoice Date' and 'Invoice Amount'. A filter overlay is active on the 'Invoice Amount' column, displaying a dropdown menu with the selected option 'Is after or equal to'. Below the dropdown are two buttons: 'FILTER' and 'CLEAR'. The table data is as follows:

column	Invoice Date	Invoice Amount
	12/03/2020	30.00
	12/03/2020	30.00
	12/03/2020	50.00
	12/03/2020	60.00

## Inquiry Feature

- ▶ Select the Direct Pay Invoice to review by clicking on the line item.
- ▶ Click on the Download PDF drop down menu.
- ▶ Select Full Report or Full Report with Image to review the Direct Pay Invoice.

