Automatic Invoice Return Feature on PO Invoices

PO Invoices will automatically be returned to the Invoice Owner if the owner does not correct the Non-PO lines on a PO Invoice. Please be sure to correctly associate the line item(s) to the Purchase Order and remove any line items that are flagged as “Non-PO” when reviewing and approving an invoice.

If you fail to correct the PO Invoice, the following will occur:

1. The system will return the PO Invoice and route it as a draft invoice to the Invoice Owner

2. An Email will be sent to the Invoice Owner stating that an invoice has been returned. (Please see screenshot below.)

   Dear Heather Showers,

   This invoice has been returned. To modify the invoice go the "Draft Invoices", page.

   Click here to view returned invoices.

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   If you have any questions with regard to this invoice, please contact the approver who returned the invoice or your Selectsite Support Team.

   Support Team Contact Information:

   +1 (518) 276-6222

   procurement_support@lists.rpi.edu

   Thank You,

   Rensselaer Polytechnic Institute
3. If you do not have the email and know an invoice has been returned to you, you can find it in the “View Draft Invoices” menu shown below:

This screen will show any invoices that have been “returned” to you at the top under “My Returned Invoices”
4. If you are unsure as to why the invoice has been returned, please review the History tab on the invoice.

5. OSCAR will continue to return the PO Invoice if no action has been taken to correct the invoice.

**How to correct an invoice that has been returned due to Non-PO lines:**

You must correctly associate the line item(s) to the Purchase Order and remove any line items that are flagged as “Non-PO” lines at the time when reviewing and approving an invoice.

To easily correct this you may “ Associate” the Non-PO lines to the correct PO/PO Lines as follows:

1. Select the Non-PO line you wish to associate
2. Scroll to the top of the very first line item on the invoice document and from the drop down box labeled For Selected Line Item select “Associate Line to a PO” [see screenshot below] and enter the correct PO in the search box and select the PO you wish to associate the line to
3. Continue this same process for all Non-PO lines on the invoice.
Once you have completed associating all of the lines on the invoice to a PO, you must click “Complete” in the upper right hand corner to “resubmit” the invoice.

The invoice will reappear in your approval queue as it has now gone back to the “Invoice Owner” workflow step and you must then “Approve” it.

If you have any questions regarding this process, please contact Procurement Support.