ROLLINS

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How to Enter an Invoice for Payment

1. Login to Chrome River (See instructional video in Blackboard for more assistance)
2. From the Dashboard, tap the +NEW button in the upper right corner.
3. Create your Report Header
    a. Once the report header populates, type in a description for your Report Name. An example Report Name might contain the vendor name, supplies or services ordered, and a date (i.e. Staples Office Supplies 5/22/18). You'll want this to provide enough information, so it can be referenced later.
    b. Then, in the "Report Type" Drop-down menu, select "Vendor Invoice." Additional fields will auto-populate.
    c. Check if the invoice will be international.
    d. Select if you have multiple invoices.
    e. Select the vendor. If you do not see your vendor populate, contact Accounts Payable.
    f. Next, select "No" where it states, "Wire Transfer Needed?"
4. Once **No Wire Transfer Needed** is selected, the following fields will auto-populate. This information should be entered in here and match info on the attached invoice.
    a. Invoice Number
    b. Invoice Date
    c. Invoice Due Date
    d. Once completed, click "save."
5. Add Expenses to your expense report.
    a. Chose the type of expense by clicking on the expense tiles on the right side of your screen.
    b. Once you have selected your expense type, you will see a drop down for different options of expense types. Select your expense type.
    c. An expense detail screen will populate. Add the date, amount, description, and other details for each expense.
    d. Add the allocation for the expense. This is the first 11 digits of a budget code, including the fund and org. You may search in the box by the digits or the name of the budget code. (If you need to split the allocation, you may do so here by selecting "Add Allocation."
    e. Lastly, attach your receipt for the expense and click save in the upper right hand corner of the detail screen.
6. Next, add additional expenses by selecting the "+" on the right hand side of the left tile in Chrome River. Follow each step of #5 above for each additional expense.
7. Once all expenses have been added to the expense report, click the green "Submit" button at the bottom of your expense list.
8. A "Submit Confirmation" will generate, review the report and then click the "Submit" button to finalize the report submission process.
9. The expense report is complete and will be automatically routed to the financial budget manager for the org entered on the report.