

Uploading Invoice Images via Email

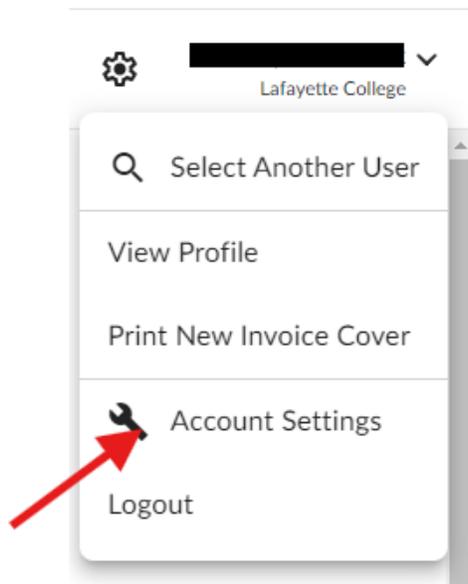
Verify email address

Before emailing an invoice or image, verify that the email address you are using is associated to your Chrome River account.

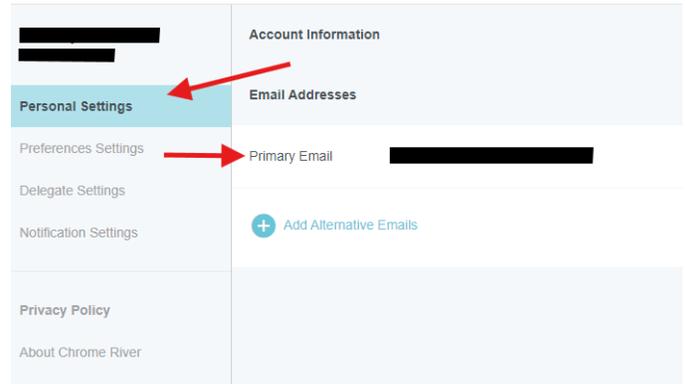
1. Click your name in the upper right corner of the navigation bar.



2. Click on **Account Settings**

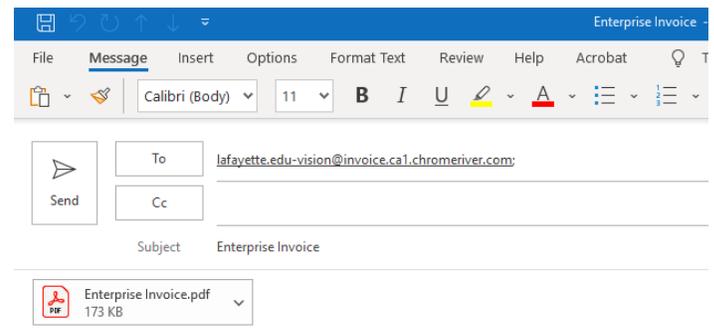


3. Select the **Personal Settings** menu item and verify the **Primary Email** address.

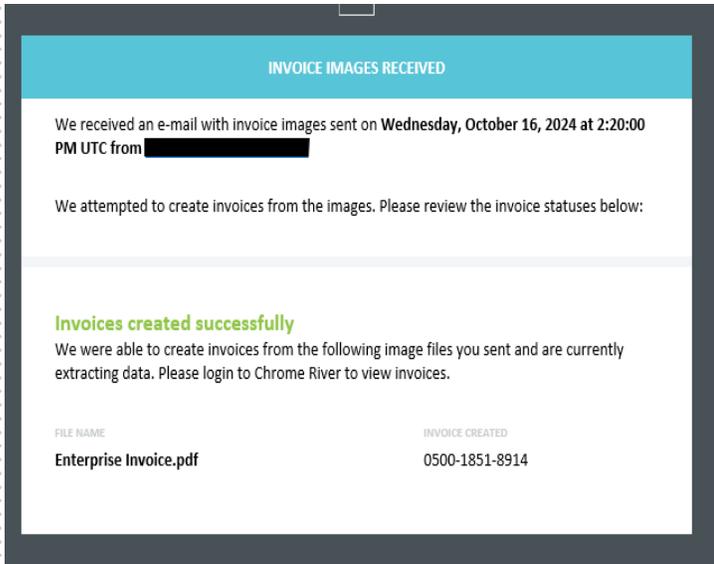


Email invoice PDF

4. Start a new email to lafayette.edu-vision@invoice.ca1.chromeriver.com and attach the PDF invoice copy. Make sure to delete any images contained in the email signature.



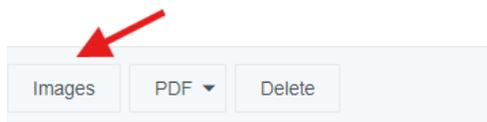
5. You will receive an email from Chrome River confirming the invoice images have been received.



6. A new invoice line will be created and displayed in the **Draft Invoices** section



7. Click on the invoice to display it on the right side of the screen.
8. Click the **Images** button to display the attached images on the left side of the screen.



9. Click the **Edit** button on the right side of the screen.



10. Review and verify the information populated during the OCR process. If any information is incorrect or missing, click on the field and edit the information.

Vendor Name Enterprise Mobility	Invoice Amount 7,829.85 USD
Vendor Address AP3 2625 Market Place Attn: Elizabeth Brindley Harrisbu...	Discount Terms % if paid in days
AP3 2625 Market Place Attn: Elizabeth Brindley Harrisburg, PA 17110 USA ID: 3db8d212-3acb-430b-b967-80a5149cc98	Discount Date [Calendar icon]
Invoice Number 37017119	Discount Amount USD
Invoice Date 09/21/2024 [Calendar icon]	Invoice ID 0500-1851-9059
	PO Number [Search]

- **Vendor Name:** Fully searchable by the vendor number, or any part of the vendor name. **When extracting data from a PDF, this field should automatically populate.**
- **Vendor Address:** Auto populates if there is only one address listed, otherwise fully searchable. **When extracting data from a PDF, this field should automatically populate.**
- **Vendor Invoice Number:** List as it appears on the vendor invoice, up to 15 characters. **When extracting data from a PDF, this field should automatically populate if a vendor invoice number is available.**
- **Invoice Date:** Date listed on the Vendor's Invoice. **When extracting data from a PDF, this field should automatically populate.**
- **Invoice Amount:** Total amount to be paid. **When extracting data from a PDF, this field should automatically populate.**
- **Discount Terms:** Enter any applicable discount terms. If none, these fields can be left blank.
- **PO Number:** If paying an invoice as part of a previously created Purchase Order, click the blue **Search** button to find the appropriate Purchase Order.

Invoice Detail

11. Complete the Invoice Detail section.

- **Check memo:** Enter a check memo for the payment. For internal your internal purposes only. This does not flow through to Banner.
- **Description:** Enter a description for the payment. For your internal purposes only. This does not flow through to Banner.

- **W9:** Check the W9 box if you're submitting a new W9 form with the invoice.

Special Handling

12. If the vendor is currently set up to receive ACH payments, we will send it electronically. If they're receiving a paper check, choose **NO** if Accounts Payable is to mail the check to the address chosen.

13. Complete the Special Handling section.

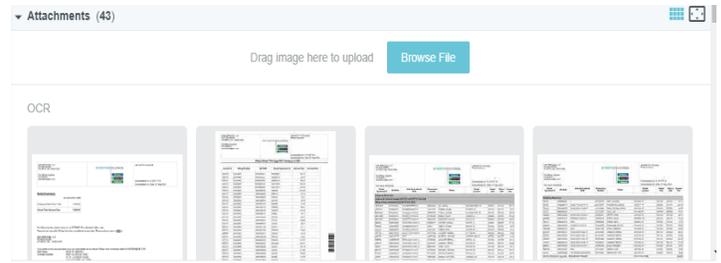
- **Pick up at Cashier's Window:** If you would like us to hold the check for pickup at the cashier's window, choose "Yes, Pick Up By" and select the Lafayette Employee's name in the box below.
- **Rush:** For an off cycle payment needed outside of our weekly Accounts Payable processing schedule.
- **Pay By Wire:** If the invoice is to be paid as a manual bank wire transfer (usually reserved for international payments). This is not to be used for vendor ACH payments.
- **Separate Check:** In a separate check is needed, place a check mark in the box.
- **Special Handling Instructions:** Add any additional instructions for the Accounts Payable staff.

Comments

14. Enter any additional comments about the invoice. Comments **cannot** be deleted or modified once posted.

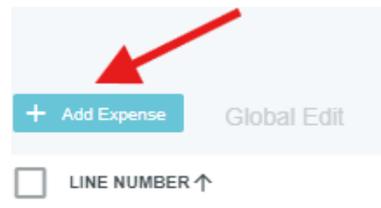
Attachments

15. When an invoice has been emailed to Chrome River, the system will automatically display the items in the **Attachments** section.

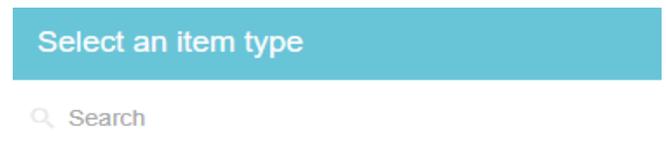


Add Expense

16. Click on the **+Add Expense** button.



17. Select an expense tile.



18. Enter/verify the total amount of the invoice allocated to this funding selection.

19. Complete the Invoice Item section and click Save.

Invoice Item

QTY: 1, Unit Price: 0 USD, Amount: 7,829.85 USD

Description: Enterprise Rentals

Account: 710341 Regular Travel

Location (Optional):

Activity Code (Optional):

Funding Source - Fund/Org/Program: 100100-50400-77 Educational & General Funds Office-Controller

- **Quantity/Unit Price:** Enter the quantity and unit price for the expense. Enter "1" if your just paying one item/invoice.
- **Description:** Enter a description for the expense.
- **Account:** Click in the account field and choose the appropriate account number from the list.
- **Location (Optional):** Click in the location field and choose the appropriate location code.
- **Activity Code (Optional):** Click in the activity code field and choose the appropriate activity code.
- **Funding Source:** Click in the funding source field and choose the appropriate Fund/Org/ Program for this expense.

click o

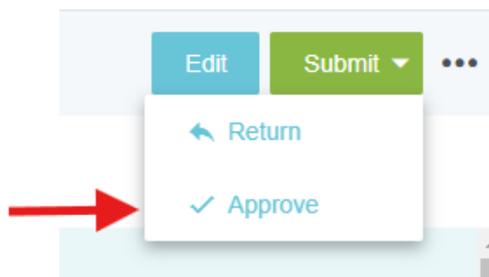
Enterprise Mobility, ID: L0498347

Data extracted may not be accurate. The data extracted may not be accurate: confidence level did not meet the threshold. This invoice may be assigned to others upon submission.

DISCOUNT (USD)	TOTAL (USD)	REMAINING (USD)
0.00	7,829.85	0.00

Invoice Item: 100100-50400-77 Office-Controller, 7,829.85

21. If you choose to Submit for processing, choose **Approve** to submit to the appropriate budget manager.



22. **Additional Reviewer:** If during approvals, it is determined an additional approver is needed, click in the **Select Additional Reviewer** field to search for and select the appropriate individual. This field is optional and can be left blank.

Approval Confirmation

I hereby approve this invoice for processing.

Select Additional Reviewer

Optional Comment

Cancel Approve

23. If an **Additional Reviewer** is selected, the system requires you to add a comment.

24. Click the green **Approve** button to submit the invoice.

Approval Confirmation

I hereby approve this invoice for processing.

Select Additional Reviewer

Optional Comment

Cancel Approve

25. The following message will be displayed.

