

Accounting may email you invoices as an attachment for approval.

1. Download the attachment as a PDF.

← **Evangelina Owens**

TI

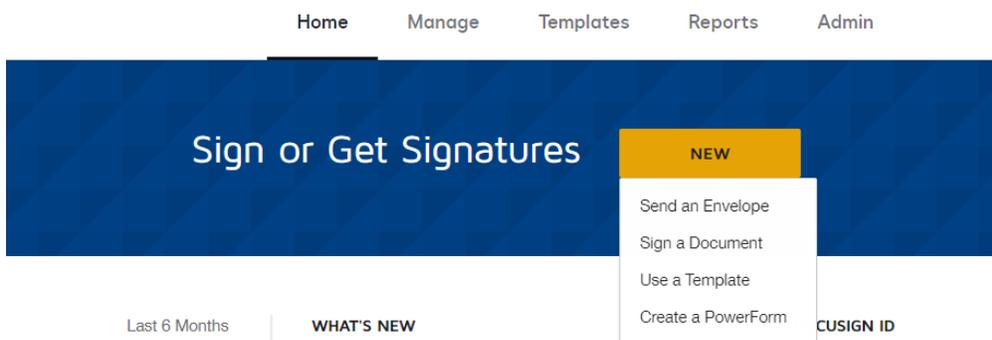
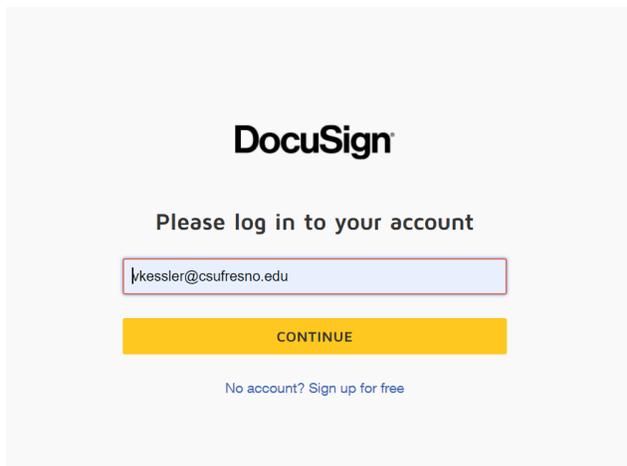
to Valerie ▾

Hello,

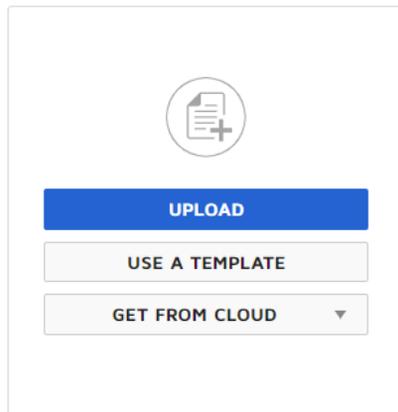
Please have the attached invoices approved and email them back to me at your earliest convenience.

Thank you,

Log into DocuSign <https://account.docusign.com/> with your Fresno State Credentials



Add Documents to the Envelope

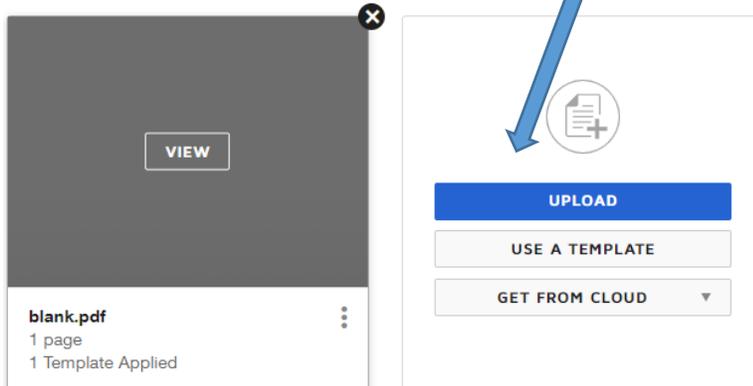


Select "Upload" to select the "Invoice" PDF you saved.

Select upload again to add any packing slips or additional information.

NOTE: When you upload, DocuSign may pop up a template it thinks you need. Disregard it by canceling the pop up window and apply the template per the instructions below.

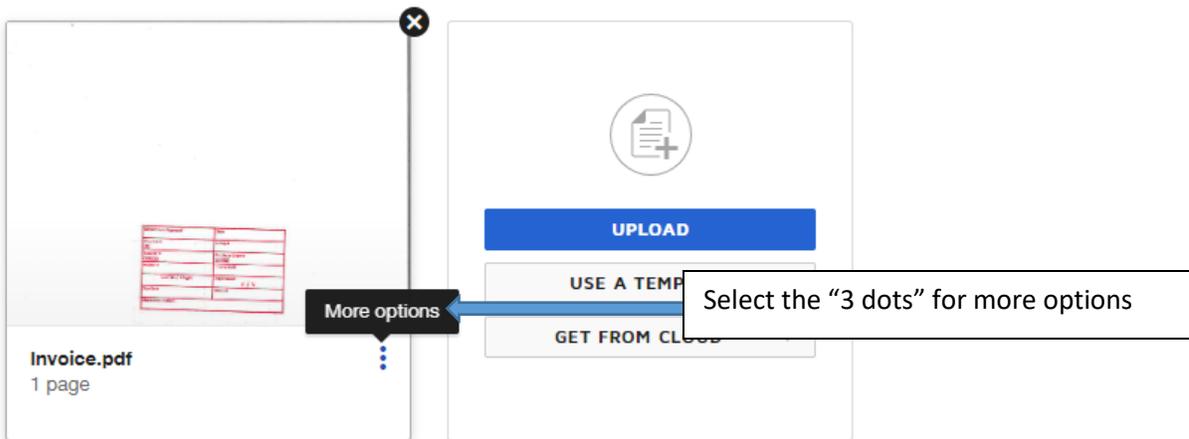
Add Documents to the Envelope



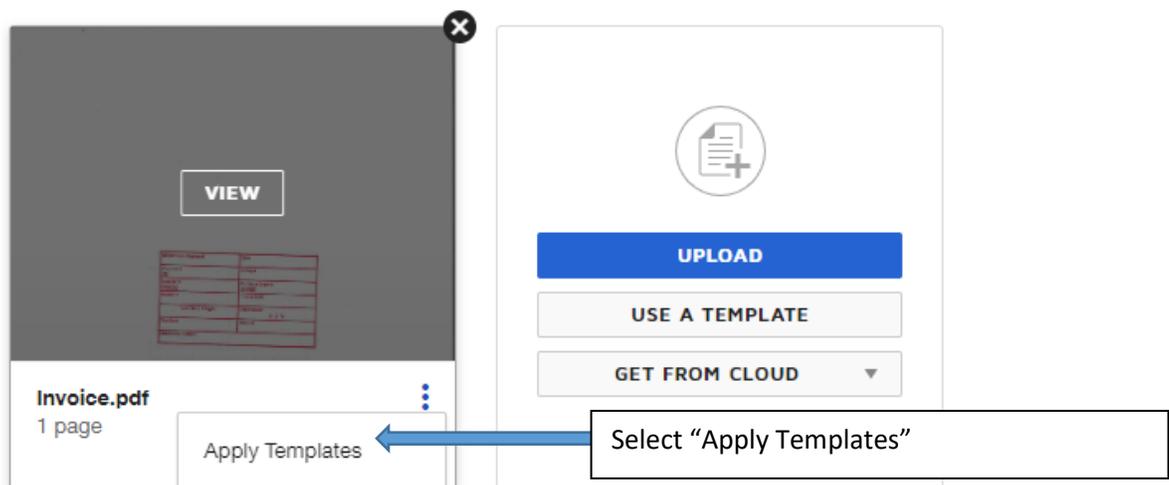
NOTE: If you are uploading **multiple** invoices you must apply the template to each of the pages where you need the approval signatures. Repeat the process below until the template is applied to each signature page.

REMEMBER to use **one envelope** per **VENDOR** as the subject of the envelope email with the vendor name will be routed to the correct accounting technician.

Add Documents to the Envelope



Add Documents to the Envelope



Add Recipients to the Envelope

As the sender, you can add recipients to the completed envelope.

[Import a bulk list.](#) Add recipients to many people at once. ⓘ

Set signing order

Apply Templates for Invoice.pdf

SUGGESTED **BROWSE** ~~SELECTED~~

1. Select "Browse"

2. Select "Shared Folders"

3. Select "Accounting"

4. Select "Invoice Approval" Template or "Invoice Approval Verify Received"

5. Select "Apply Selected"

My Templates

- Shared with Me
- All Templates
- Favorites

Folders

- AG OPERATI...
- Alterations
- Budget Office
- Catering
- Cell Phone
- Direct Pay
- Financial Sign...
- Hospitality
- Invoice
- Printing Servi...

View More

Shared Folders

- Accounting**
- Budget Office
- Internship Co...
- OnBase Integr...
- Procurement
- Vintage Days ...

Search

Name	Owner	Last Change
<input type="checkbox"/> Invoice Approval - Template	Valerie Kessler	
<input type="checkbox"/> Invoice Approval - Verify Received - Template	Valerie Kessler	3/23/2020 03:32:41 pm

APPLY SELECTED CANCEL

There are two invoice approval templates. Invoice Approval and Invoice Approval-Verify Received. Invoice approval – Verify received is designed to also obtain verification so the warehouse can receive the product into the system. You can remove any unwanted signature blocks below, by pressing the “X” to remove. (See screen shot at bottom)

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list.](#) Send copies of this envelope to many people at once. ⓘ

Set signing order

1 **PO Verifier** ✍ NEEDS TO SIGN ▾ MORE ▾

Name *
⋮

Email *

Enter the Appropriate contact information

2 **Verify Received** ✍ NEEDS TO SIGN ▾ MORE ▾

Name *
⋮

Email *

3 **Approver** ✍ NEEDS TO SIGN ▾ MORE ▾

Name *
⋮

Email *

5 **Accounting Copy** CC RECEIVES A COPY ▾ MORE ▾

Name *
⋮ Accounts Payable

Email *
accounts payable@listserv.csufresno.edu

6 **Receiving Copy** CC RECEIVES A COPY ▾ MORE ▾

Name *
⋮ Tiffany Burmeister

Email *
tburmeister@mail.fresnostate.edu

ADD RECIPIENT

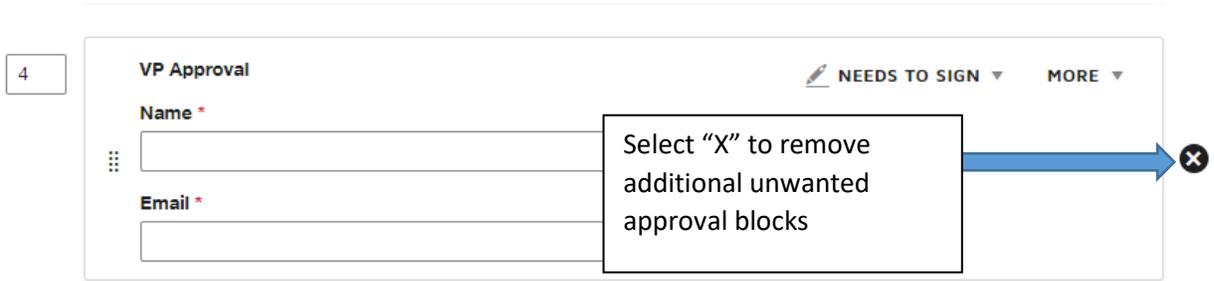
4

VP Approval NEEDS TO SIGN MORE

Name *

Email *

Select "X" to remove additional unwanted approval blocks



It is **very important** to enter the **Vendor or Payee name** in the Email Subject field. The approval form will go to a list serve and the accounting technician will download based on that name.

Message to All Recipients

Custom email and language for each recipient

Email Subject*

Please DocuSign: DirectPay VENDOR NAME

Characters remaining: 61

Email Message

Hello,
Please approve the direct pay for processing.

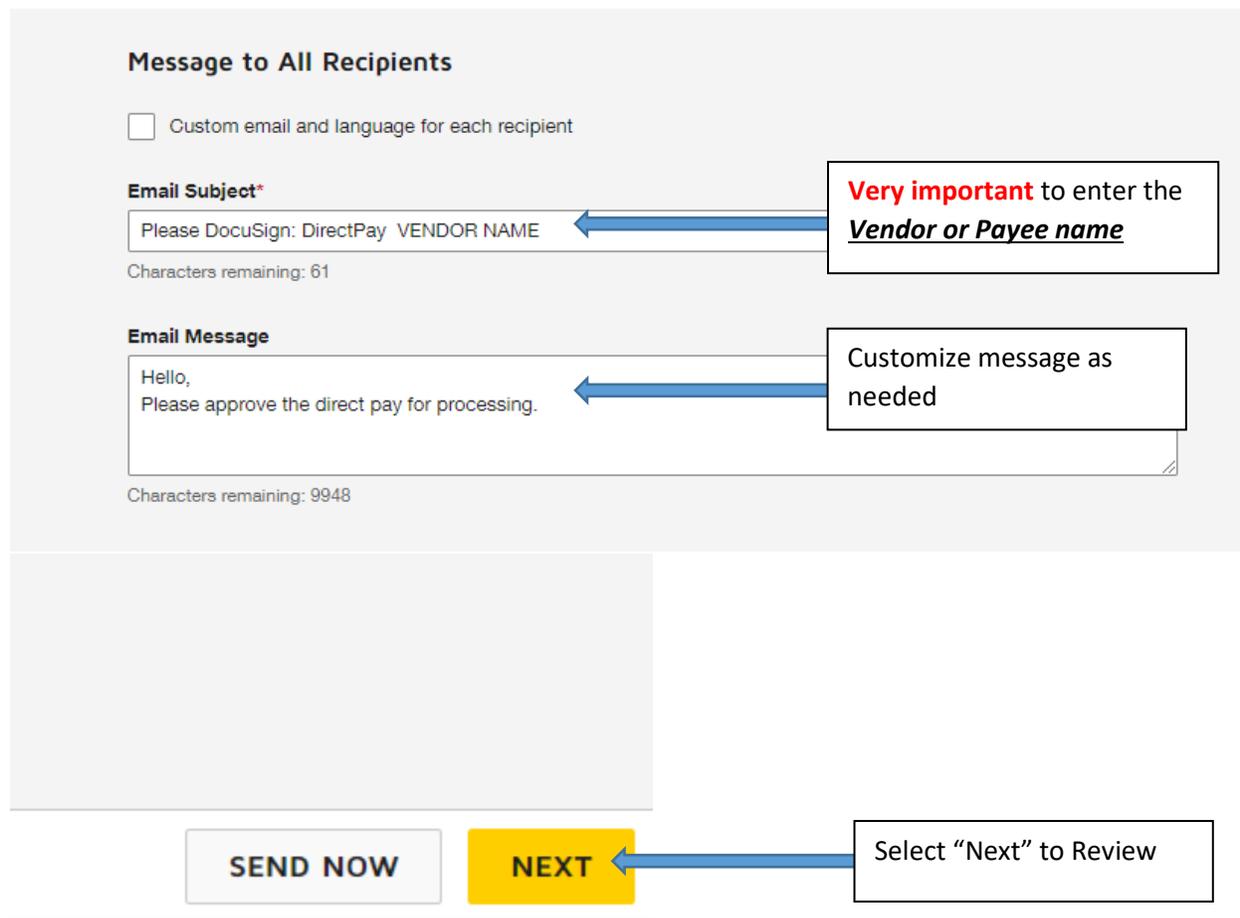
Characters remaining: 9948

SEND NOW **NEXT**

Very important to enter the **Vendor or Payee name**

Customize message as needed

Select "Next" to Review



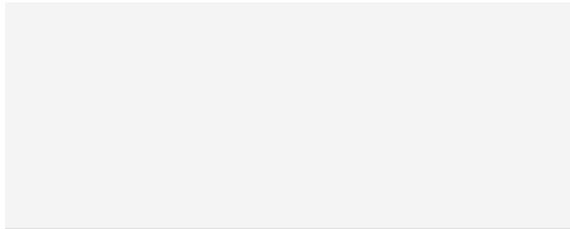
NOTE: You might need to move and align these fields with your uploaded Invoice.

Notes:
I have verified all items for this invoice were received.

Sign
Full Name Date Signed

Approved to pay PO Text
Sign
Full Name Date Signed

Department Approval	Date
Voucher # 00	Group #
Supplier # 00000	Purchase Order # 00000
Invoice #	Invoice Date
Use Tax / Freight	Reportable? Y / N
Due Date	Amount
Check Information	



SEND NOW NEXT

Once you Select "Send" the form will be sent to your designated approvers you assigned and then to the Accounting office. You will receive a notification once the document is complete.