Chrome River Invoice Training

ruexpense.regis.edu

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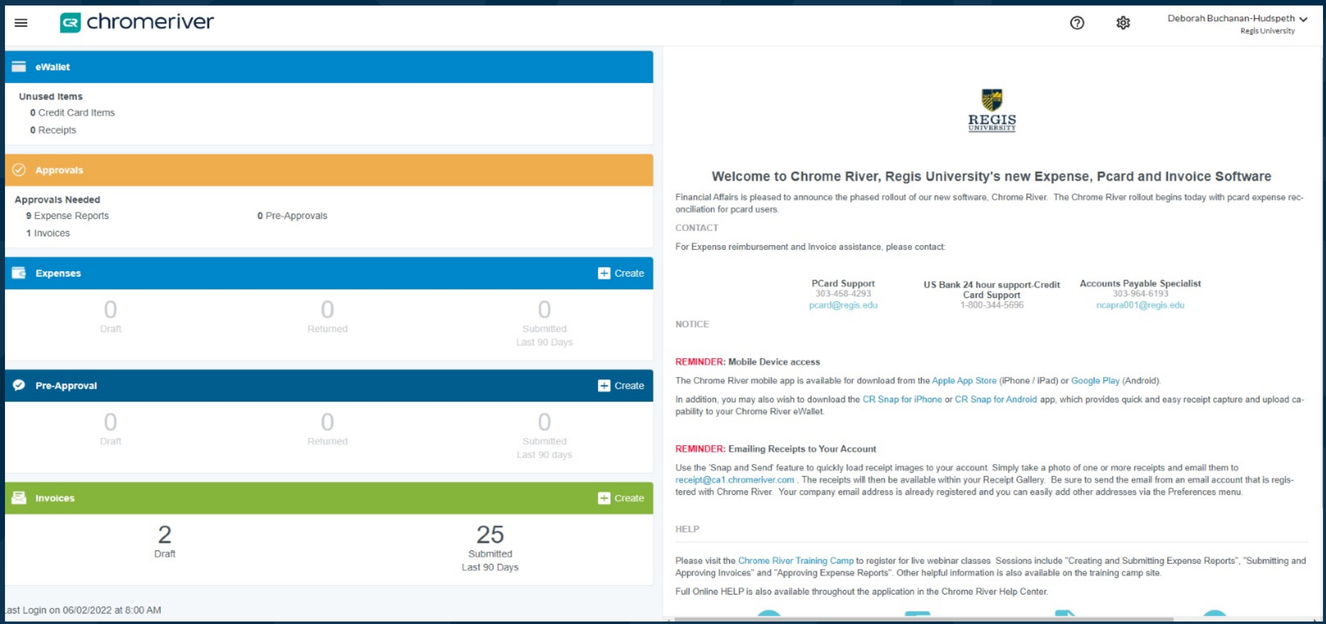
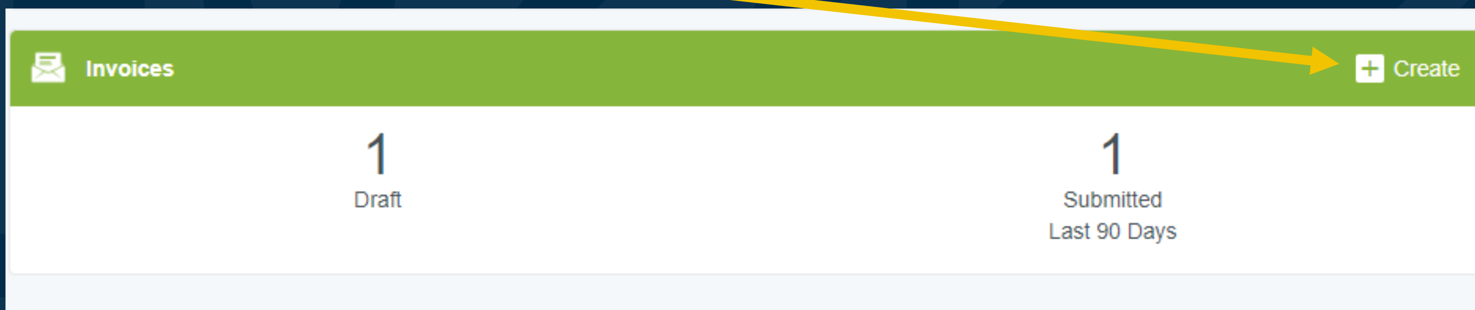
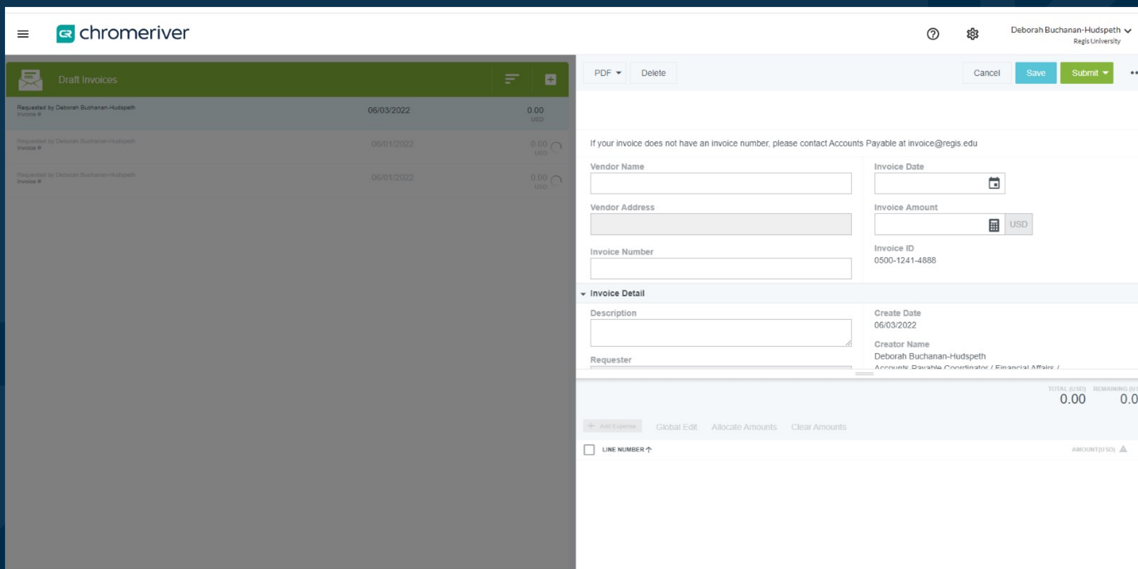
1. Save the invoice as a PDF before beginning.
2. You can do this by printing to PDF or scanning and saving as a PDF.
3. Open Chrome River: ruexpense.regis.edu.
4. Your home page will look like this:



1. Scroll to the bottom of the page to the Invoice Ribbon.
2. Click on +Create to add a new invoice:

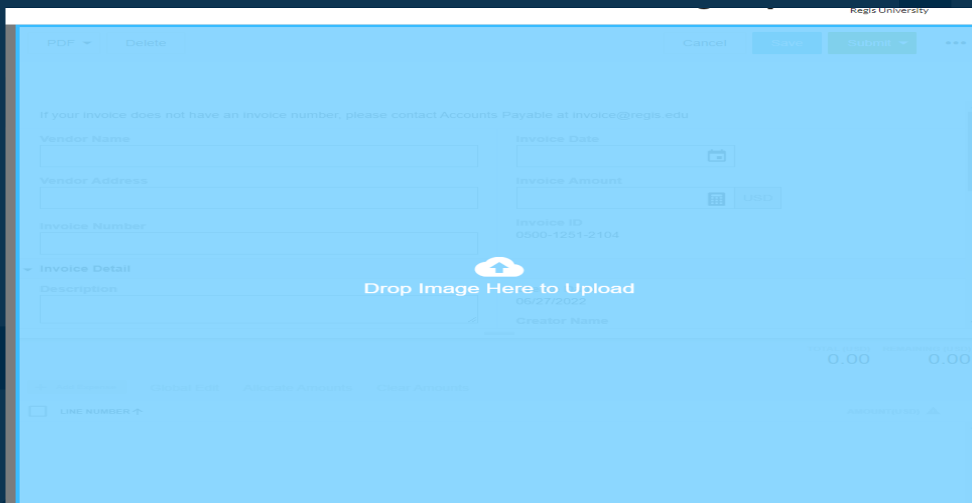


1. The following screen will appear once you have selected +Create:

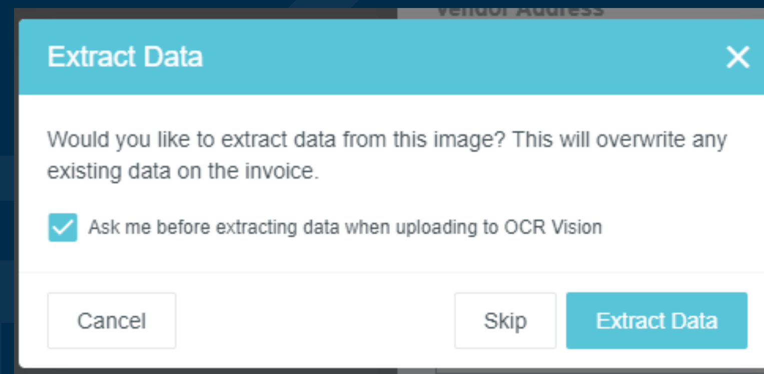


2. At this point we suggest dragging and dropping the invoice into the screen, so that you may refer to it when entering in the information. *Helpful Hint: Save the PDF invoices in a folder that is easily accessible. If the image is open, you will not be able to drag and drop.*
Also, you will no longer need a Check Request, as the approval process is all done via the approval rules in Chrome River, commiserate with Workday.

1. As the image is dropped into the screen, a message will appear that says “Drop Image Here to Upload”:

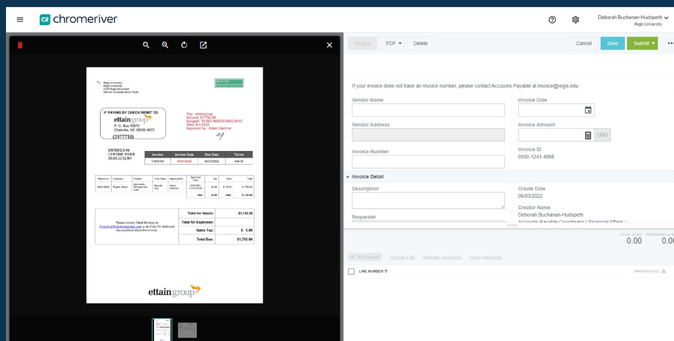


2. Another box will appear, select Extract Data or Skip:

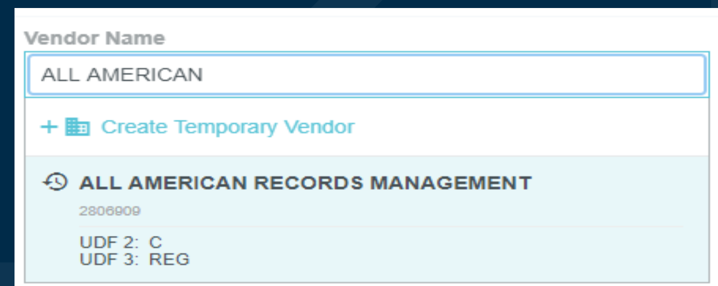


2. This is a function I would suggest playing around with. Extract data should extract the information to your invoice form, it is a slow process to begin. If you select Skip, you will enter in the invoice information manually, on the form.

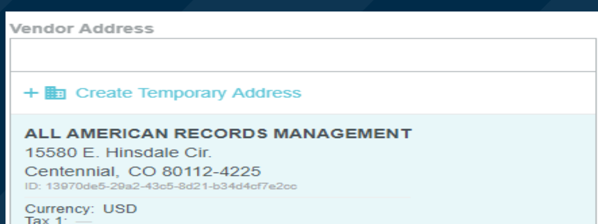
1. Once you have imported the invoice, the screen should look like this:



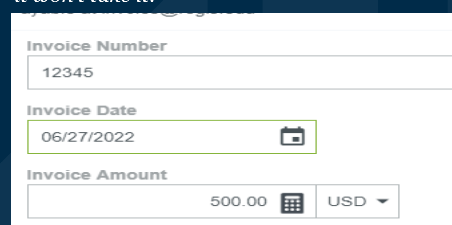
2. You may start typing in the vendor, or use the vendor ID to search in the drop-down. If the vendor you are looking for isn't in the list, please email invoice@regis.edu, so that we may add them in the system.



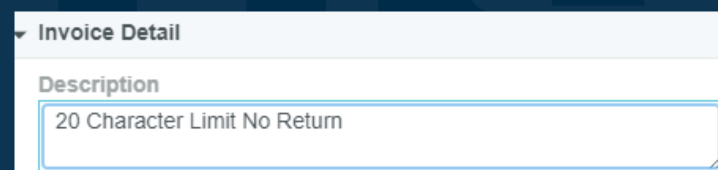
3. Select the correct Remit address from the list (look at the invoice for the remit address). If the address isn't listed in the dropdown, select temporary address. We will have to add that in on our side.



4. Enter in the remaining information, directly from the invoice. *Helpful hint: If the invoice has no invoice number, please contact invoice@regis.edu, and we will help you.*
When entering the invoice date, please click on the calendar and select the date, otherwise it won't take it.



5. When adding a description, it can only contain 20 characters, and no tabs or carriage returns. It will give you an error during submission if you go over these parameters.
Helpful hint: If you need to add additional information that won't fit in the description box, please use the comments section. This section won't show up on the check, but will be part of the submission.



The next sections may or may not apply to your particular invoice. Please read your invoice carefully to determine if these fields need to be filled out.

Created via OCR?

No

Created via OCR will automatically fill in if you selected Extract Data when you imported the invoice. Otherwise, that field may stay at No.

Independent Contractor

No

If the invoice references an Independent Contractor Agreement, select Yes.

Honorarium

No

If this is an honorarium select Yes.

Capital Project

No

If the purchase is part of a capital project, select Yes.

Fiscal Year

FY23

This should always remain at the default, unless we are at the end of the fiscal year. *Helpful hint: The fiscal year runs from May 1 – April 30th.*

Is this payment part of a larger project that exceeds $5,000 and is longer than 1 year?

No

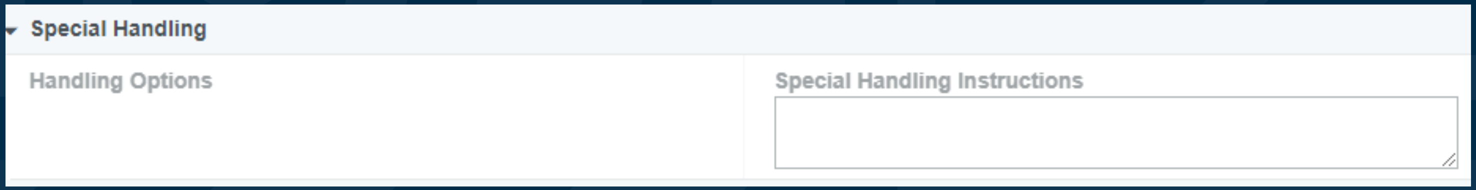
Answer Yes if this applies to the invoice.

Fiscal Year Date

Vendor Type

Income Type

Please use the Special Handling section if you have special instructions for the check, for instance, if the check needs to be held. *Helpful hint: We don't hold checks for vendors, unless the vendor comes to pick it up with a valid business ID.*



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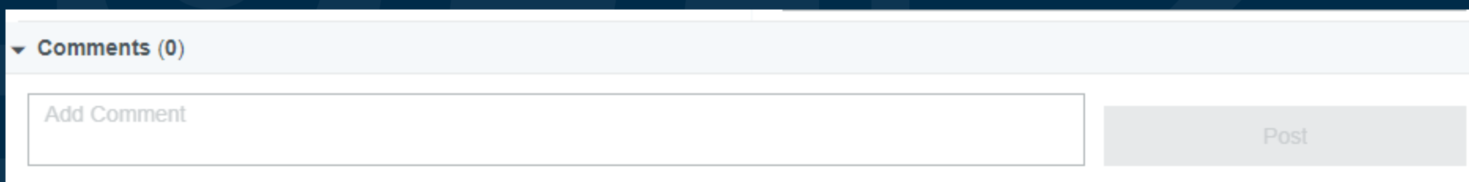
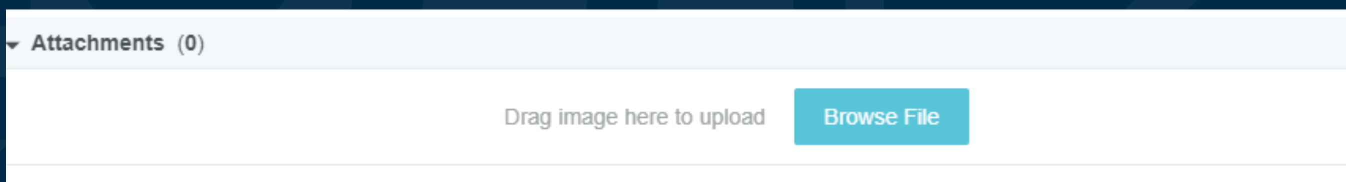
Please use the Comments section to add any additional information that didn't fit in the description box.

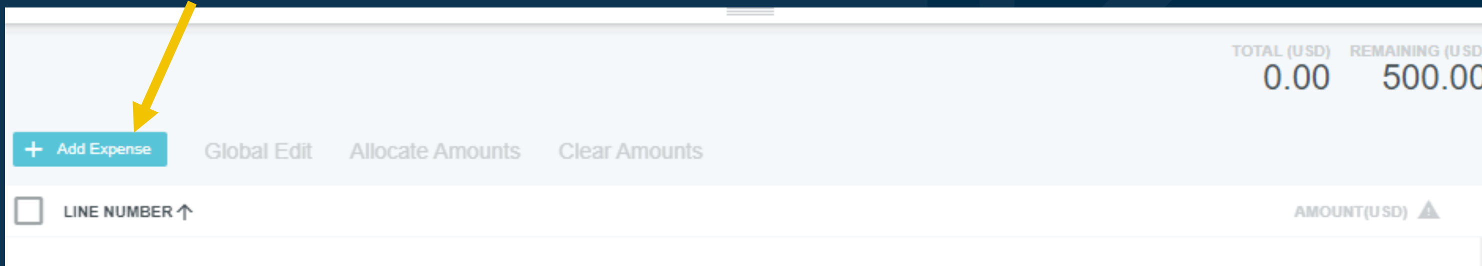


If you did not drag and drop your invoice at the beginning, here is where you would attach it, select Browse File and select it from your computer.



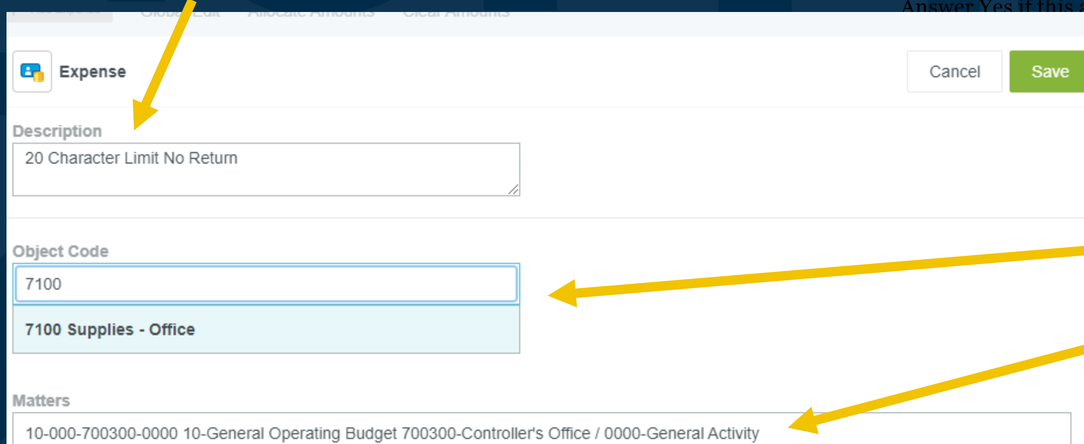
Once the invoice detail has been filled out, the next step is to add the expense allocation(s).

1. Click on +Add Expense



2. The description you added above will copy here.

Answer Yes if this applies to the invoice.



3. Type in the object code, it will appear in the drop down menu. *Helpful hint: We have updated our object codes, please see the guide on our Chrome River Landing Page. When you type in the object code you must select it from the drop-down menu, otherwise it will revert to being blank.*

4. The Matters box references your default department allocation. If you need to charge outside your department, highlight the entire line and delete. Begin typing in the new allocation, and select from the drop down menu.

5. Once everything has been filled out, select Save. *Helpful Hint: If you have more than one expense allocation, repeat the steps.*

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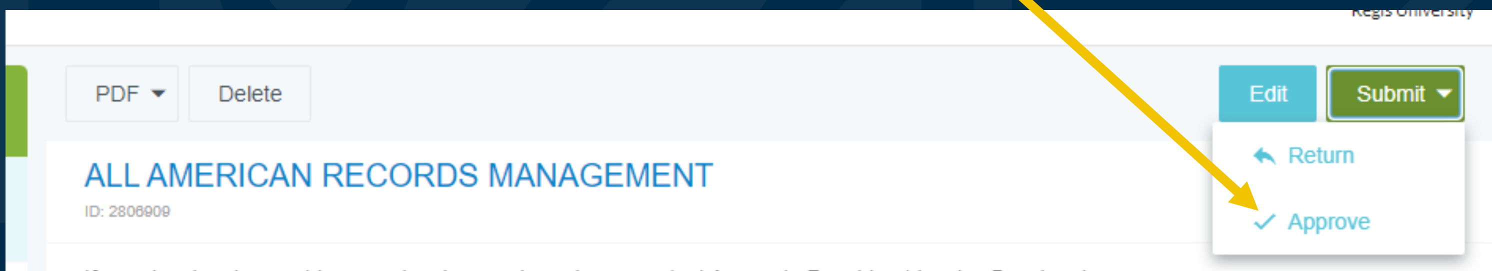
Once you have entered in everything, double check that all fields are populated, and that no errors have been made. Once completed, select Submit, Approve:



Then select Approve once more: