AP Invoices Via DocuSign
AP Training Guide & Live Demo
Training Agenda

- Overview
- Logging in to DocuSign
- Approval initiated by Fiscal Services
  - Approval Workflow
  - Process
- Approval initiated by Department
  - Approval Workflow
  - Process
- Adding an Additional Approver
Overview

The electronic invoice approval process will begin in DocuSign April 15th!

- Processes include:
  1. Fiscal Services sends an invoice to Department for approval via DocuSign
  2. Department submits an invoice for payment via DocuSign

- You cannot setup a DocuSign account using a Departmental email address.
Logging in to DocuSign

Logging in Directly to DocuSign
- [http://docusign.sfsu.edu/](http://docusign.sfsu.edu/)
- Enter SF State Email Address
- Enter SF State Credentials via SF State Gateway
- Under Overview, click on Action Required.

Logging in via Email Notification
- Open DocuSign email received and select Review Documents
- Enter SF State Credentials via SF State Gateway and select Continue.
- Corresponding document will open to approve/edit.
Invoice Approval Initiated by Fiscal Services

Fiscal Services receives the invoice and will send to Department for Approval via DocuSign.
DocuSign Approval Workflow

1. Invoices from Vendors
2. Received by Fiscal Services
3. Forward to Department Contact
4. Department Approver for Approval
5. Accounting for Fund Verification
6. Accounts Payable for Processing
Step 1: Reviewing invoice

- Open Email notification and click REVIEW DOCUMENTS.
- Click CONTINUE after reading the message under Please Review & Act on These Documents.
Step 2:
Reviewing invoice

✓ Select **START** to begin reviewing and complete **ALL** required fields for payment processing.

✓ Continue to review and click **NEXT**. The invoice will be located below the template.

✓ Click **FINISH** when done.

✓ If goods and services has yet to be received/rendered, please do not submit for payment.
Step 3: Reviewing invoice

- Click **Continue**.
- You will be sent back to the DocuSign homepage.
- Under Overview, click **Action Required**.
Step 4: Adding Department Approver

- Invoice Status should be **Need to Manage**.
- Click **MANAGE** to enter Approver information.
- Enter **Department Approver (Email and Name)**
- Click **COMPLETE AND SEND**.
- Invoice will then route to the Department Approver indicated to approve and continue routing until completion.

If an additional Department Approver is needed, click **EDIT ENVELOPE** instead of complete and send.
Invoice Approval initiated by Department
Department receives the invoice, approves, and submits for payment via DocuSign.
DocuSign Approval Workflow

1. Invoices from Vendors
2. Receive by Department Contact
3. Department Approver for Approval
4. Accounting for Fund Verification
5. Accounts Payable for Processing
Step 1:
Selecting Template

✓ From the DocuSign homepage, click New.
✓ Then select use a Template.
Step 2: Selecting Template

- Under Select Template, click on Shared Folders under Folders.
- Then select Fiscal Affairs.
- Select Invoice Approval Form-Non ORSP (initiated by Department)
- Click ADD SELECTED.
Step 3: Upload Invoice

- Click on **ADVANCED EDIT**.
- Click **UPLOAD** to attach invoice. Locate invoice saved on computer and click **Open**.
Step 4: Add Recipients to Template

- Add Department Contact (yourself).
- Then add a Department Approver.
- Please note: Once you start typing name, system will locate the individual, select the name with email address. Email address will self populate.
- If you need to add an additional Approver, click ADD RECIPIENT at the bottom.
- Do not alter prepopulated workflow.
Step 5: Email Subject

- Scroll down to **Message to All Recipients**.
- Add Vendor Name and invoice number to the **Email Subject**.
- Click **Send NOW**.

![Email Subject interface with example text](image)
Adding an Additional Approver

**Step 1:** Add Recipient

- Click on **Edit Envelope** (only if initiated by Fiscal Services)
- Click on **Add Recipient**.
Step 2: Add Recipient

- Name Role however you choose. For example: Department Chair, Dean, etc.
- Enter Name and click on the appropriate name and email address that pops up.
- Names listed are examples only!!
Step 3: Add Recipient

- Drag Additional Approver (Department Chair) box by clicking and dragging the dotted symbol up and place before the Department Approver.
- Numbering will adjust.
- Click NEXT.

Numbering gap is normal and is for adding multiple approvers if needed.
Step 4: Add Recipient

✓ Click on the Recipient drop down menu and select the name of the new approver.
Step 5:  
Add Recipient

- Click and drag **Signature** and **Date Signed** icons into the free space next to the Department Approval section.
- Click **SEND**.
Contact Information

- **General questions regarding DocuSign:**
  - Quality Assurance: [DocuSign@ San Francisco State](mailto:DocuSign@SanFranciscoState)
  - Email at [quteam@sfsu.edu](mailto:quteam@sfsu.edu)

- **Invoice questions:**
  - Fiscal Services: [fcalsvcs@sfsu.edu](mailto:fcalsvcs@sfsu.edu),
  - Leticia Valdez X80538

- **Payment questions:**
  - Accounts Payable
  - Mandy Huang [mandyhua@sfsu.edu](mailto:mandyhua@sfsu.edu) X53683