

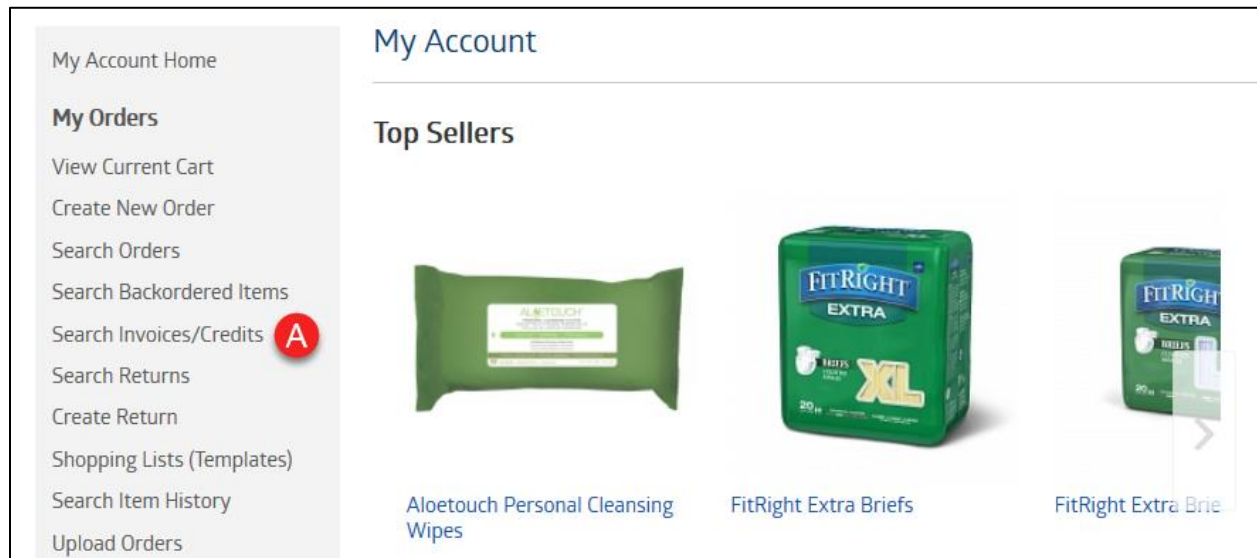


## Approve to Pay

Approve to Pay is Medline's Invoice Reconciliation tool that allows customers to electronically approve their invoices to be paid. Please be aware in order to use this feature, you will need to have the correct permission added to your user profile.

If you would like to use Approve to Pay, please contact your Medline Sales Representative, or you may contact our website support at [helpdesk@medline.com](mailto:helpdesk@medline.com).

Once you have logged in, you have now arrived at the My Account landing page.



- a. From here, select "Search Invoices/Credits"



## Approve to Pay

Search For Invoices/Debit Memos/Credit Memos [? Help for this page](#)

Search For: **A**

Timeline: **B** Last 1 Day

Document Type: **C** ☒ Invoice Any Status ☒ Credit M Any Status ☒ Debit Me <None>

Accounts **D** ☒ Account Under Verification ☐ All acco Approved for payment ☐ Search v Canceled

- (Optional) Enter search keywords such as PO Number, Order Number, or Document Number.
- Chose a timeline from the dropdown, or click on “Select Date Range” to create a custom timeline for your search.
- Select the document type that you are looking for. Note that the “Invoice” option will now have a drop down to select an invoice by status. “Any status” will be the default option. To understand what the different statuses mean, read in the next section below.
- If multiple locations are available to you, click the blue “Select” option in the “Search with in Selected Accounts” which will allow you to choose as many accounts as you wish or you may also select “All accounts I have access to.”



## Approve to Pay

### Search For Invoices/Debit Memos/Credit Memos

[? Help for this page](#)

Search For:

Timeline: Select Date Range

From:  To:

☒ Invoice Any Status

Document Type: ☐ Credit Memo ☐ Debit Memo

Accounts: ☒ Account 1071790 only ☐ Search within selected accounts [Select](#)

☒ Your search has returned the following 7 records

Showing 1 - 7 of **A** results


Sold To #	Document #	PDF	Type	Date	Gross Amount	Total Amount	PO#	Due Date	Status <b>B</b>	
1071790	<a href="#">1838166225</a>		Invoice	11/06/2017	\$12.33	\$12.33	testg2p12	11/06/2017	Approved for payment	<input type="checkbox"/>
1071790	<a href="#">1838166226</a>		Invoice	11/06/2017	\$12.33	\$12.33	testg2p13	11/06/2017	Approved for payment	<input type="checkbox"/>
1071790	<a href="#">1838166228</a>		Invoice	11/06/2017	\$12.33	\$12.33	testg2p14	11/06/2017	Under Verification	<input type="checkbox"/>
1071790	<a href="#">1838125324</a>		Invoice	11/04/2017	\$12.27	\$12.27	testg2p1	11/04/2017		<input type="checkbox"/>
1071790	<a href="#">1838125327</a>		Invoice	11/04/2017	\$0.01	\$0.01	testg2p11	11/04/2017		<input type="checkbox"/>
1071790	<a href="#">1838125325</a>		Invoice	11/04/2017	\$12.27	\$12.27	testg2p4	11/04/2017		<input type="checkbox"/>
1071790	<a href="#">1838125326</a>		Invoice	11/04/2017	\$12.27	\$12.27	testg2p6	11/04/2017		<input type="checkbox"/>

Showing 1 - 7 of 7 Results


- Click on a document number to visit the interactive invoice screen.
- After executing the search, you'll see a new "Status" column that shows you the invoice approval status. "Under Verification" means that the invoice has been partially checked in. "Approved for Payment" means that the invoice has been approved by a user and is ready to be paid.

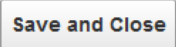



## Approve to Pay

**Invoice:** 1838166228  Save as PDF

**Invoice Status:** Under Verification

 Update

 Save and Close

 Approved for Payment

**Invoice Date:** 11/06/2017

**Sold To:** IS TESTING ACCOUNT  
2800 PALO PKWY  
BOULDER, BOULDER 80301-1540

**Invoice #:** 1838166228

**Ship To:** IS TESTING ACCOUNT  
2800 PALO PKWY  
BOULDER, BOULDER 80301-1540

**Customer PO #:** TESTG2P14

**Order #:** 465249347

**Customer #:** 1071790

**Currency:** USD

**Amount Due:** \$12.33

 Shipped: from C75 - Lacey, WA 5 EA on 11/04/2017 [FEDEX GROUND \(FDXG\)](#) Packing Slip: [0918282622](#) Mark as Received by Mike Czerwinski (Admin) on 06/15/2018 ([remove](#))

- You can check the individual lines in to receive items or check all items by checking the box under “Received” and then clicking on the “Update” button. When received, you will see who and when it was received in.
- Once the invoice is ready for payment, you can click on “Approved for Payment” indicating the invoice is “Approved to Pay” – which will then prompt a pop-up box to which will notify your Accounts Payable that the invoice is ready to be paid.



## Approve to Pay

Approved for Payment

Change the invoice status to "Approved for Payment".

Notification:

To: 

A

[Add](#)

Message: 

B

C

☒ Attach PDF Invoice

Update Status

Cancel

- Enter the email address that the "Approved to Pay" notification will be sent to. This field can also be pre-populated so that the same email address is always shown, reach out to your Sales Representative for more information.
- (Optional) A message can be added to the email notification so when the email is read, the recipient can see any additional comments that have been made.
- By default, invoices will be included as an attachment in the email unless the option is un-checked.