

Search Invoices & Credits

With Approved for Payment



This search provides convenient access to your Medline invoices as well as credit and debit memos with the option to print or save as a PDF. If you still have questions, feel free to [call](#) or [email](#) our Helpdesk for technical assistance.

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[Search Invoices/Credits/Debits](#)

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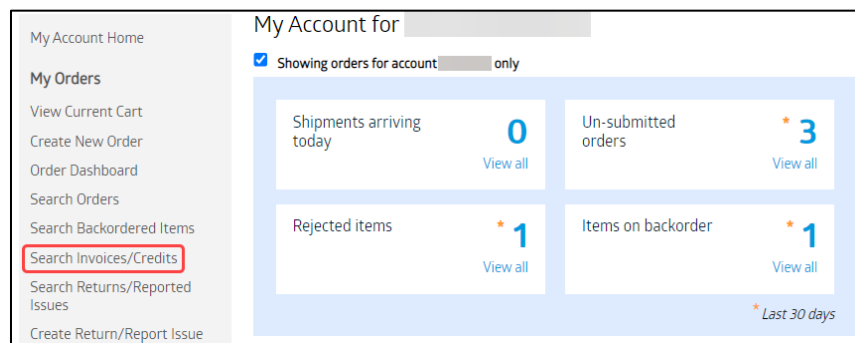
[View Invoice and/or Mark Item\(s\) as Received](#)

[Approved for Payment](#)

Search Invoices/Credits/Debits

Log in and go to the My Account page, then complete the following steps:

Select Search Invoices/Credits



Select **Search Invoices/Credits** within the navigation tool on the left hand side of your screen.

For more information on how to use specific features on our site, visit medline.com/help

Created: 4/19/2023



Search Invoices & Credits

With Approved for Payment



Select Search Criteria

[Help for this page](#)

Search For:

Timeline: Last 1 Day

Document Type: Invoice Any Status

Credit Memo

Debit Memo

Accounts Account only

All accounts I have access to

Search within selected accounts [Select](#)

Disclaimer: This feature is intended to be used as a tool for acknowledging receipt of product shipments within your organization. Information provided in no way satisfies any outstanding debts to Medline. Please call 800-388-2147 for inquiries regarding outstanding account balances.

1. (Optional) Enter search keywords. For a reminder of keywords available to be searched, you can hover your mouse over the gray “?” information box.
2. Choose a Timeline from the dropdown, or click **Select Date Range** to create a custom timeline for your search.

Last 1 Day ▼

Last 1 Day

Last 7 Days

Last 30 Days

Last 90 Days

Last 180 Days

Last 270 Days

Last 365 Days

Select Date Range

3. Select Document Type of Invoice, Credit Memo or Debit Memo.

Invoice Any Status

Any Status

<None>

Under Verification

Approved for payment

Canceled

For Invoice, selections are:

- Any Status: User can search for all statuses - None, Under Verification, Approved for Payment and Canceled
- <None>: No action has been completed. i.e. Invoice has not been marked received.
- Under Verification: Marked as received
- Approved for payment: Marked as received and approved for payment
- Canceled: Invoice has been canceled.

Credit Memo

Debit Memo

Credit Memo: This is a credit given on an account. i.e. Returned Item
 Debit Memo: This is an open invoice with a change of balance.
Either can be downloaded by clicking on the pdf icon or using the checkbox to print the pdf or save the pdf

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4. Select Account(s) in which you would like to search.

- Account only
- All accounts I have access to
- Search within selected accounts [Select](#)

Account XX only: Search will only be performed in this account.

All Accounts I have access to: All accounts

Search within Selected Accounts [Select](#): Click on the blue Select option, which will allow you to choose multiple accounts

Once you have entered the account search criterion, click the **Search** button to perform the search.



Open, Print or Save as PDF

✓ Your search has returned the following 13 records

[Print](#) [Save as PDF](#)

Showing 1 - 13 of 13 Results

Sold To #	Document #	PDF	Type	Date	Gross Amount	Total Amount	PO#	Due Date	Status	<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input checked="" type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$89.57	\$94.60		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$69.19	\$73.85		06/04/2023		<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023		<input type="checkbox"/>

Showing 1 - 13 of 13 Results

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From the search invoice and credits search results page, you can access an individual invoice either by:

Clicking on the **Document #** to open the document within Medline.com, **clicking** on the **PDF icon** within the line item to open the invoice as a separate PDF, or **check the box** at the end of the line item. This will allow the “Print” and “Save as PDF” buttons to become active to select an option.



Search Invoices & Credits



With Approved for Payment

To Open and Save Multiple Invoices as a PDF or Print

Sold To #	Document #	PDF	Type	Date	Gross Amount	Total Amount	PO#	Due Date	Status	<input checked="" type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: Print, Save as PDF

If you wish to open and save all documents within your search criteria as a PDF, **click** on the **top box** next to Status in the header. It will select all lines. Then **click Save as PDF**. This will save all selected items as one document for you to save and or print.

Sold To #	Document #	PDF	Type	Date	Gross Amount	Total Amount	PO#	Due Date	Status	<input type="checkbox"/>
			Invoice	02/23/2023	\$44.88	\$44.88		03/25/2023	<input type="checkbox"/>	<input type="checkbox"/>
			Invoice	02/23/2023	\$38.22	\$38.22		03/25/2023	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			Invoice	02/23/2023	\$462.00	\$462.00		03/25/2023	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You can also select one or more of the documents you wish to save as a PDF, and not all of documents by clicking on selected boxes.

Open and Access Individual Invoice

Sold To #	Document #	PDF	Type	Date	Gross Amount	Total Amount	PO#	Due Date	Status	<input type="checkbox"/>
			Invoice	04/05/2023	\$95.99	\$102.47		06/04/2023	<input type="checkbox"/>	<input type="checkbox"/>

Click on the **linked Document number** on the line item.



Search Invoices & Credits

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View Invoice and Mark Item(s) as Received

Invoice: [Save as PDF](#)

Invoice Status:

Invoice Date: 04/12/2023 Sold To:
Invoice #: Ship To:
Customer PO #:
Customer #:
Order #:
Currency: USD
Amount Due: \$

Received	#	Order QTY	Unit	Invoice QTY	SKU	Description	Unit Price	Amount
<input type="checkbox"/>	250	2	CS	1	SWD81882712	MBO-SYRINGE,MAGELLAN,TB;1ML,27X1/2"	\$	\$

Shipped: from C02 - Grayslake, IL 1 CS on 04/11/2023 MEDTRANS (M178) Packing Slip: [123456789](#)

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Once opened, you will be able to view the details of the invoice. Each line item will provide the location where the items were shipped from along with courier information including tracking and packing slip link.

Mark Item(s) as Received

Invoice: [Save as PDF](#)

Invoice Status:

Invoice Date: 03/27/2023 Sold To:
Invoice #: Ship To:
Customer PO #:
Customer #:
Order #:
Currency: USD
Amount Due: \$

Received	#	Order QTY	Unit	Invoice QTY	SKU	Description	Unit Price	Amount
<input type="checkbox"/>	10	16	EA	16	MSCEX44EPH	OPTIFOAM GENTLE EX, BORDERED, 4X4	\$	\$
<input type="checkbox"/>	20	25	PAK	25	MDS202095H	APPLICATOR,COTTON-TIP,PLASTIC,6,STERILE	\$	\$

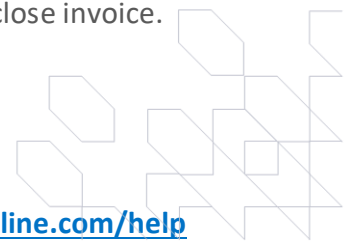
Shipped: from B33 - Lincolnton, NC 16 EA on 02/08/2023 FEDEX GROUND (FDXG) Packing Slip: [12345678](#)

Shipped: from B33 - Lincolnton, NC 25 PAK on 02/08/2023 FEDEX GROUND (FDXG) Packing Slip: [12345678](#)

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- 1) Select box(es) on left hand side under **Received** column.
- 2) Click **Update** button to update, click **Save and Close** button to save updates and close invoice.

Save to PDF: Click to save as a PDF document



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Received	#	Order QTY	Unit	Invoice QTY	SKU	Description	Unit Price	Amount
<input checked="" type="checkbox"/>	20	1	CS	1	MMM2050	MBO-DRAPE,STERIDRAPE 2, INCISE, 23 X 23"	\$	\$

Shipped: from C02 - Grayslake, IL 1 CS on 02/28/2023 MEDTRANS (M178) Packing Slip: [123456789](#)

Mark as Received by LAURA DELISI-CS on 04/12/2023 [\(remove\)](#)

If you marked as received by mistake, **click (remove)** to update the line item to show it was not received.

Approved for Payment

When you are within a selected invoice and ready to approve for payment, **Click the green Approved for Payment** button.



Approved for Payment ×

2 item(s) in this invoice are not marked as received. Please select an option if you wish to continue

Mark them as received

Leave them as is

If you did not previously mark the item(s) as received, you will receive a pop up box. **Select the radio button accordingly.** The continue button will become active. **Click Continue** to advance to the next pop up box.



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A screenshot of a web application window titled "Approved for Payment" with a close button (X) in the top right corner. The window contains the following elements:

- A header: "Approved for Payment" with a close button (X) in the top right corner.
- A sub-header: "Change the invoice status to 'Approved for Payment'."
- A "Notification:" section containing:
 - A "To:" field with a greyed-out text input box.
 - An "Add" link below the "To:" field.
 - A "Message:" label followed by a text input box containing the word "optional".
- At the bottom, two buttons: a green "Update Status" button with a red arrow pointing to it, and a grey "Cancel" button.

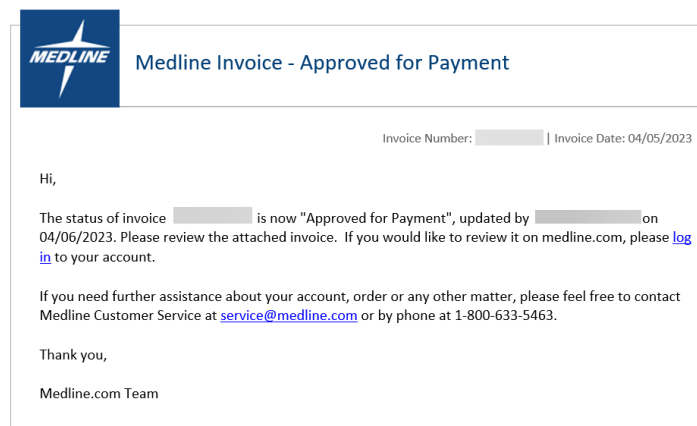
You will next receive the **Approved for Payment** pop up box.

The email address field is either editable or hardcoded if populated.

You can add an additional email to receive this request by **clicking** on **Add** and providing an additional **email address**.

Message box: If all items were marked as received, this field is optional. If there are items not marked as received this field is mandatory.

Once complete **click** the green **Update Status** button to send.



The above email and an attached invoice will be sent to the individual(s) listed as recipients.

NOTE: Some of the data retrieved has been hidden for privacy purposes. You will receive all of these fields to completeness when performing your own search. Your results will display for the selected criteria.

