Completing a Transaction

All invoices need to be ‘completed’ (i.e. approved) before they can be printed and sent to the customer. Invoices can only be completed by those that have either AR Supervisor or AR Manager responsibilities.

To complete your own invoice

If you have access to either of these responsibilities, you can complete the transactions by simply clicking on the compete button on the invoice header screen.

To complete invoices raised by another colleague

1. The supervisor needs to find all invoices awaiting completion by navigating to the Transaction summary window.
   - Once navigated, go to the View menu and select Find.
   - In the Find Transactions window select No in the Complete field using the drop-down list.
   - Click on Find.

Responsibility: AR Manager or AR Supervisor
Navigate: Transactions → Transaction Summary
Menu: View → Find

![Find Transactions window](attachment:image)
2. For each incomplete transaction, check all relevant information by selecting the transaction and clicking on the Open button.

3. Check all data as appropriate, such as customer, line items and distributions.

4. To complete an invoice, return to the Transaction Summary window and click on the Complete button.