

A photograph of a tree-lined campus path with students walking, overlaid with a green tint.

Bates

Accounts Payable

Invoice Approval Cover Sheet



Bates

If you do not have a Bates issued Adobe Sign account, please email accounting@bates.edu to request your account and training.

Log into Adobe Sign:

<https://batescollege.na2.documents.adobe.com/account/homeJS>



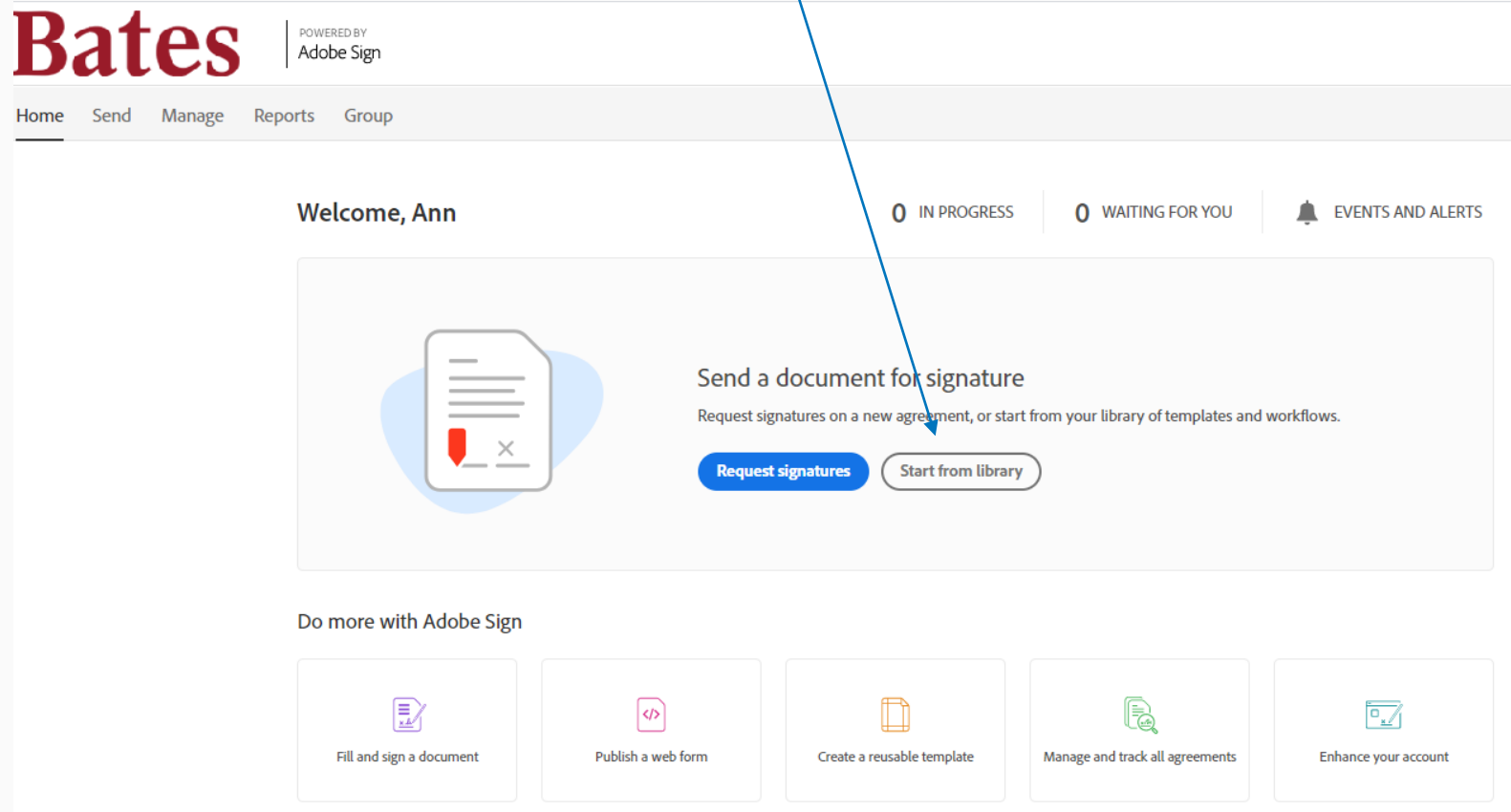
Bates

Are you routing an invoice for approval, proceed to page 4

Are you submitting an invoice for payment, proceed to page 10

Routing for approval

Choose Start from Library



The screenshot shows the Bates Adobe Sign dashboard. At the top left is the 'Bates' logo in red, followed by 'POWERED BY Adobe Sign'. A navigation bar contains links for 'Home', 'Send', 'Manage', 'Reports', and 'Group'. The main header area says 'Welcome, Ann' and displays three status indicators: '0 IN PROGRESS', '0 WAITING FOR YOU', and a bell icon for 'EVENTS AND ALERTS'. The central content area features a document icon with a red signature and a blue highlight. To its right, the text 'Send a document for signature' is followed by the instruction 'Request signatures on a new agreement, or start from your library of templates and workflows.' Below this text are two buttons: a blue 'Request signatures' button and a grey 'Start from library' button. A blue arrow points from the text 'Choose Start from Library' to the 'Start from library' button. At the bottom, a section titled 'Do more with Adobe Sign' contains five cards with icons and labels: 'Fill and sign a document', 'Publish a web form', 'Create a reusable template', 'Manage and track all agreements', and 'Enhance your account'.

Bates | POWERED BY Adobe Sign

Home Send Manage Reports Group

Welcome, Ann

0 IN PROGRESS | 0 WAITING FOR YOU | EVENTS AND ALERTS

Send a document for signature
Request signatures on a new agreement, or start from your library of templates and workflows.

[Request signatures](#) [Start from library](#)

Do more with Adobe Sign

- Fill and sign a document
- Publish a web form
- Create a reusable template
- Manage and track all agreements
- Enhance your account

Routing for approval

If the invoice needs to be routed for approval, click on Templates, choose Invoice Approval Cover Sheet, and click Start.

The screenshot shows a web interface titled "Start from library". On the left is a sidebar with navigation options: "Library", "Recent Templates", "Templates" (highlighted in blue), and "Workflows". The main area displays a list of templates under the heading "Shared Templates". The list has columns for "Name" and "Last Modified". The "Invoice Approval Cover Sheet" template is selected, highlighted with a blue background, and enclosed in a black rectangular box. At the bottom right of the interface are two buttons: "Cancel" and "Start" (highlighted in blue). Three blue arrows indicate the workflow: one from the "Templates" sidebar item to the template list, one from the "Invoice Approval Cover Sheet" template to the "Start" button, and one from the instructional text above to the "Start" button.

Name	Last Modified
My Templates	
Shared Templates	
Advance Request Form	02/10/2021
Bates 2021 Virtual PW Core Internship - Bates Funded	03/15/2021
Departmental Hiring Form for Faculty	02/04/2021
Facility Services - Invoice Approval Cover Sheet	11/13/2020
Invoice Approval Cover Sheet	03/10/2021
Payment Request Form	02/03/2021
Request for Pandemic Paid Sick Leave	06/29/2020
Simple Payment Cover Sheet	01/29/2021
Vendor ACH Authorization Form	02/10/2021

Routing for approval

Click on Add Me

Add the approver's email

CC accounting@bates.edu

Drag your invoice here or
click on Add Files to add
your invoice.

Click Next.

The screenshot shows a 'Routing for approval' form. At the top, there are tabs for 'Recipients' and 'Options'. The 'Recipients' section has a toggle for 'Complete in Order' (off) and 'Complete in Any Order' (on). Below this is a list of recipients: 1. 'Myself' with an email icon and 'Email' button. 2. 'nwilliam@bates.edu' with an email icon and 'Email' button. 3. 'Enter recipient email' with an email icon and 'Email' button. Below the recipients is a 'CC' section with a 'Hide' link and a text input field containing 'accounting@bates.edu'. The 'Message' section has a text area with the text 'Invoice Approval Cover Sheet' and 'Please review and complete Invoice Approval Cover Sheet.' Below the message is a 'Files' section with a list of files: 'Invoice Approval Cover Sheet' and 'CMP 3501-7417-417.pdf'. To the right of the files is an 'Add Files' button. Below the files is a 'Drag More Files Here' button. At the bottom of the form is a 'Next' button. The 'Options' section on the right has a 'Completion Deadline' of 14 days, a 'Signature Type' of Electronic, and a 'Recipients' Language' of English: US.

Recipients

Complete in Order ☐ Complete in Any Order ☒

Add Me | Add Recipient Group | ?

1 Myself Email

2 nwilliam@bates.edu Email

3 Enter recipient email Email

CC | Hide

accounting@bates.edu x

Message

Invoice Approval Cover Sheet

Please review and complete Invoice Approval Cover Sheet.

Files

Invoice Approval Cover Sheet x

CMP 3501-7417-417.pdf x

Add Files

Drag More Files Here

Options

☒ Completion Deadline

14 days

to complete this agreement.
Agreement expires after Apr 8, 2021.

Signature Type

☒ Electronic ☐ Written

Recipients' Language

English: US

☒ Preview & Add Signature Fields

Next

Routing for approval

This is a preview of the Invoice Approval Cover Sheet.

Click on Sign, then Send.

Bates

Supporting Documents

INVOICE APPROVAL COVER SHEET

Vendor Name: *

Invoice Amount:

Index Number:

Fund Code: *

Org Code: *

Account Code:

Activity Code:

Location Code:

Notes:

Ann Lavalliere (me)
(Signer)

Signature Fields ^

- Signature
- Initials
- Signature Block
- Stamp

Signer Info Fields v

Data Fields v

More Fields v

Transaction Fields v

[Reset Fields](#)

☐ Save as template

Sign, then Send

Bates

[Click to Attach Supporting Documents](#)

INVOICE APPROVAL COVER SHEET

Vendor Name: ABC Company

Invoice Amount: \$25

\$50

USD

USD

Index Number:

Fund Code:

0010

0010

Org Code:

7004

7004

Account Code:

9010

9130

Activity Code:

Location Code:

Notes:

Click to change

Adobe Acrobat

Acro Location (Mar 25, 2025)

X

By signing, I agree to both this agreement and the [Consumer Disclosure](#). My use of Adobe Sign is governed by the [Adobe Terms of Use](#).

Click to Sign

[Click to Attach Supporting Documents](#)

▶ Vendor Name: ABC Company

▶ Invoice Amount:	\$25	\$50	USD	USD
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Index Number:

Fund Code:	0010	0010		
------------	------	------	--	--

Org Code:	7004	7004		
-----------	------	------	--	--

Account Code:	9010	9130		
---------------	------	------	--	--

Activity Code: Location Code:

Notes:

Click to change


Am Lovell (Mar 25, 2021)

By signing, I agree to both this agreement and the [Consumer Disclosure](#). My use of Adobe Sign is governed by the [Adobe Terms of Use](#).

[Click to Sign](#)

Routing for approval

This will now route to the next person, once that person approves, it will be emailed to all parties, including accounting@bates.edu.



You have successfully signed "Invoice Approval Cover Sheet".

A copy has also been sent to you at alavalli@bates.edu for your records.
"Invoice Approval Cover Sheet" was sent for signature to accounting@bates.edu.
As soon as the agreement is complete, all eligible parties will be e-mailed PDF copies.

Reminders

Reminders sent until completion: Every day

You will be alerted:

- If the document you sent has **not been viewed by today at 11:47 PM.**
- If the document you sent has **not been signed by Mar 26 at 3:47 PM.**
- If the document you sent has **been viewed but not signed by Mar 27 at 3:47 PM.**
- **1 day(s)** before agreement expiration date.

[Change alert settings](#)

What's next?

[Send Another Document](#) | [Manage This Agreement](#)

All agreements that are not completed within 365 days will be automatically expired.

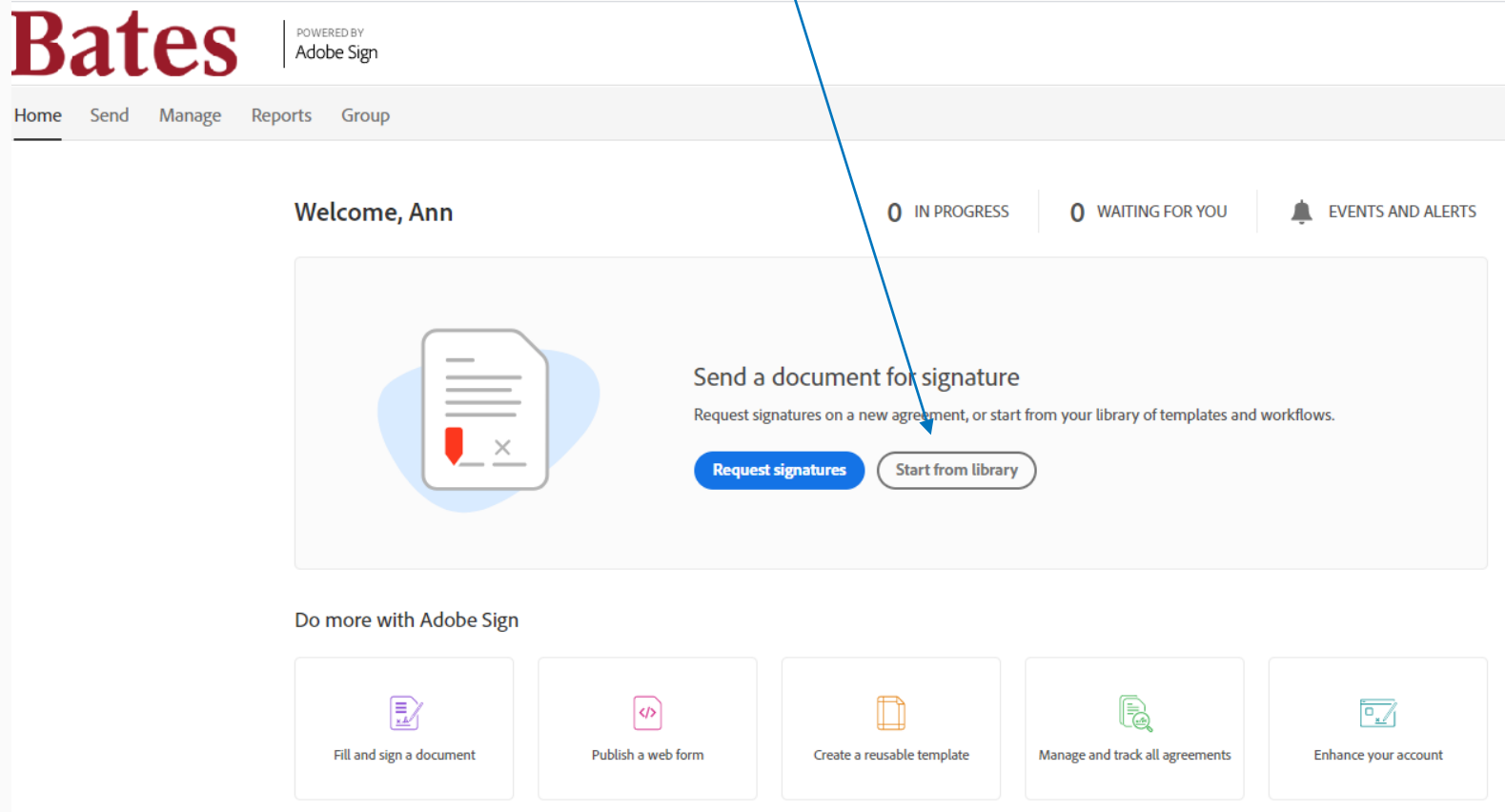
Notes:

Remember to cc accounting@bates.edu, not financialinvoices@bates.edu

Once 'Completed', you do not need to do anything as long as you have cc'd accounting@bates.edu (page 6).

Submitting an invoice for payment

Choose Start from Library



The screenshot shows the Bates Adobe Sign dashboard. At the top left is the 'Bates' logo in red, followed by 'POWERED BY Adobe Sign'. Below this is a navigation bar with links: Home, Send, Manage, Reports, and Group. The main content area starts with a 'Welcome, Ann' greeting. To the right of the greeting are three status indicators: '0 IN PROGRESS', '0 WAITING FOR YOU', and a bell icon for 'EVENTS AND ALERTS'. The central part of the dashboard features a large card titled 'Send a document for signature' with a document icon. Below the title is the text 'Request signatures on a new agreement, or start from your library of templates and workflows.' At the bottom of this card are two buttons: 'Request signatures' (blue) and 'Start from library' (grey). A blue arrow points from the text 'Choose Start from Library' to the 'Start from library' button. Below the main card is a section titled 'Do more with Adobe Sign' containing five tiles: 'Fill and sign a document' (purple icon), 'Publish a web form' (pink icon), 'Create a reusable template' (orange icon), 'Manage and track all agreements' (green icon), and 'Enhance your account' (teal icon).

Bates | POWERED BY Adobe Sign

Home Send Manage Reports Group

Welcome, Ann

0 IN PROGRESS | 0 WAITING FOR YOU | EVENTS AND ALERTS

Send a document for signature

Request signatures on a new agreement, or start from your library of templates and workflows.

[Request signatures](#) [Start from library](#)

Do more with Adobe Sign

- Fill and sign a document
- Publish a web form
- Create a reusable template
- Manage and track all agreements
- Enhance your account

Submitting an invoice for payment

If you code and approve your own invoices, click Workflows, click Invoice Approval Cover Sheet, and click Start

The screenshot shows a web interface titled "Start from library". On the left is a sidebar with a menu containing "Library", "Recent Templates", "Templates", and "Workflows". The "Workflows" item is highlighted in blue. The main content area has a search bar at the top. Below it is a table with two columns: "Name" and "Last Modified". The table is filtered to show "Shared Workflows". One workflow is listed: "Invoice Approval Cover Sheet (Self-Signed/Financial Offices)" with a last modified date of "03/03/2021". At the bottom right of the interface are two buttons: "Cancel" and "Start".

Name	Last Modified
Shared Workflows	
Invoice Approval Cover Sheet (Self-Signed/Financial Offices)	03/03/2021


Cancel Start

Submitting an invoice for payment




Everything has been filled in for you on this page through the workflow.

You will not be able to attach documents here, you will need to do it on the cover sheet.

Click Next.


Recipients 

Signer *

 **Myself**  **Email** 

CC | [Hide](#)

Cc

accounting@bates.edu 



Agreement Name *

Invoice Approval Cover Sheet (Self-Signed/Financial Offices)

Message *

Please Sign.

Files

 **Document ***  **Invoice Approval Cover Sheet**

☒ Preview & Add Signature Fields

Next

Submitting an invoice for payment

This is a preview of the Invoice Approval Cover Sheet.

Click on Sign, then Send.

Bates

Supporting Documents

INVOICE APPROVAL COVER SHEET

Vendor Name: *

Invoice Amount:

Index Number:

Fund Code: *

Org Code: *

Account Code:

Activity Code:

Location Code:

Notes:

Ann Lavalliere (me)
(Signer)

Signature Fields

- Signature
- Initials
- Signature Block
- Stamp

Signer Info Fields

Data Fields

More Fields

Transaction Fields

[Reset Fields](#)

☐ Save as template

Sign, then Send

Submitting an invoice for payment

Bates

Attach supporting documents

Click to Attach Supporting Documents

Enter Vendor Name

INVOICE APPROVAL COVER SHEET

Vendor Name: ABC Company

Enter Invoice Amount

Invoice Amount: \$25 \$50 USD USD

Enter FOAPAL

Index Number:				
Fund Code:	0010	0010		
Org Code:	7004	7004		
Account Code:	9010	9130		
Activity Code:				
Location Code:				

Notes:

Click to change

Click to Sign

Click on Click to Sign

Adobe Acrobat
App Location (Mar 25, 2021)

By signing, I agree to both this agreement and the [Consumer Disclosure](#). My use of Adobe Sign is governed by the [Adobe Terms of Use](#).

Click to Sign

Submitting an invoice for payment

You're done. A completed cover sheet, invoice, and audit report will be emailed to accounting@bates.edu



You're all set

You finished signing "Invoice Approval Cover Sheet (Self-Signed/Financial Offices)".

We will email the final agreement to all parties. You can also [download a copy](#) of what you just signed.

Manage your Adobe Sign agreements

Manage