# **California State University Monterey Bay**



# Preparing Payment Request using Accounts Payable as Certified Recipient in Adobe Sign.

The purpose of this document is to assist AdobeSign users in preparing payment requests designating the AP team's <u>paymentrequest@csumb.edu</u> email address as a Certified Recipient. This revised process will allow payment requestors to include <u>paymentrequest@csumb.edu</u> in the original AdobeSign routing instructions, thereby avoiding any duplicate work or forwarding of completed, authorized payment requests.

CSUMB users can find the AdobeSign link on the CSUMB Dashboard or use the link: <u>https://csumb-sign.na2.documents.adobe.com/account/homeJS</u>

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#### **CSUMB Accounts Payable** For all payment requests, travel expense claims, and travel advance requests: <u>paymentrequest@csumb.edu</u> For general inquiries: <u>accounts\_payable@csumb.edu</u>



Go to: Home page and select "Request Signatures" option which will bring up the blank payment request page.

1. Select either the **Complete in Order** or **Complete in Any Order** option in the Recipients section.

If the preparer selects the **Complete in Order** option, the signers receive and sign the document in the order that their email addresses are entered into the **To:** field.

If the preparer selects the **Complete in Any Order** option, all recipients receive the document signature request at the same time and can sign in any order. The Accounts Payable team may acknowledge receipt prior to the completion of the authorization/certification of the payment request by the authorized signers. After the last signer has completed the signing process, all parties receive a Signed & Filed email with the signed PDF attached. The final approved document also then will be sent automatically to <u>paymentrequest@csumb.edu</u> upon completion of all signatures; it is only at this time that the payment request, TEC, or other document will be processed.

#### Get documents signed

Send an agreement to others for e-signing, approval, or other processing.

Complete in Order	Add Me Add Recipient Group
how CC Message *	
Agreement Name	Options 😨
Please review and complete this document.	Password Protect
	Set Reminder
Files*	Add Files
	English: US
Drag & Drop Files Here	

Next

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2. Click on the drop-down menu in the recipients' field to select the appropriate status (Signer, Certified Recipient, etc.) and order of the signers.

Remember to include those who have a delegated authority based on your division or departmental organizational structure and current delegation of authority documentation.

Keep "Preview & Add Signature Fields" box checked.

Send from:	: Default (Primary Group)	y	
Recipient Complete i	s* in Order Complete in Any Order	Add Me Add Recipient	Group 🛛
1	♂ ✓ Enter recipient em		
Show CC	👉 Signer		
Message*	Approver		
Agreem	Acceptor	Options	0
Please re	Certified Recipient	Password Protect	
	🖻 Form Filler	□ Set Reminder	
Files *	→ Delegator	Add Files Recipients' Language	
		English: US	~
	Drag & Drop Files Here		

- 3. Add the <u>paymentrequest@csumb.edu</u> email address to the recipients' list as the final recipient using "**Certified Recipient**," which ensures the final approved/completed payment request is forwarded to the <u>paymentrequest@csumb.edu</u>
  - Ensure the "Email" option is selected instead of a signature.

# Failure to follow the steps listed above will result in the accounts payable team not receiving your payment request.

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## Get documents signed

Send an agreement to others for e-signing, approval, or other processing.

Send from:	Default (Primary Group)	- O		
Recipients Complete in	* Order Complete in Any Order		Add Me Add Recipie	ent Group
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3	P v paymentrequest@csumb.edu	•	🖂 🗸 Email	$\triangleright$ ×
4	♂ ➤ Enter recipient email			
Show CC				
Message*				
Agreeme	nt Name		Options	0

- 4. Under the "Message" fields:
  - In the "Agreement Name" enter the vendor name and invoice ID
  - Add message to the message box for the recipients

Recipients* Complete in Order Complete in Any Order	Add Me Add Recipi	ent Group
1 ⊘ ∽ smano@csumb.edu .	🚛 🗸 Adobe Sign	>
2 <i>&amp;</i> ✓ Enter recipient em S		
CC   Hide		
Enter CC's em		
Message*		
Agreement Name	Options	0
Please review and complete this document.	Password Protect	
	□ Set Reminder	
Files* Add Files	Recipients' Language	
	English: US	~
	English: US	~

5. Under "Files"

Select "Add Files" link which will bring up file selection screen (see below)

#### **CSUMB** Accounts Payable

6. Select "Choose Files from My Computer"

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	Library		_
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		Cancel Attach	

- 7. Select the document (s) you would like to add to your payment requests and add them to the payment request. Please note, documents will be added and viewed by the recipients in the order they were selected and combined in one multipage document.
- 8. When all the required documents are added, select "Next" at the bottom of the page to continue to the next page where you will add additional fields for recipient completion (signature(s), date, name, title, text boxes, etc.)

Home Send Manage Reports				Olga 🗸
Field Templates	□ □ Relative to Page Navigate to			
<b>7</b>				<ul> <li>▲ RECIPIENTS</li> <li>■ Shari Mano (smano@c ∨ (Approver)</li> </ul>
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	Line 1 7,039.5	6,441.69 597.8	0.00 0.00	Saus Browner
	Line 2	0.00 0.00		save Progress

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For all payment requests, travel expense claims, and travel advance requests: <u>paymentrequest@csumb.edu</u> For general inquiries: <u>accounts\_payable@csumb.edu</u> 9. Make sure to add signature and date fields for the signers. To add signature field, click and drag the "Signature" field to the desired place on the document. Use the same step for initials, signature block, and stamp. Please DO NOT add the signature box to the paymentrequest@csumb.edu recipient.



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10. Review Adobe Sign payment requests.

If you need to make changes, use "Reset Fields" to change the current page or the "Back" button to go back to the previous page.

If you agree with the prepared document, use the "Send" button to send it to the assigned recipients. Please note, accounts payable (paymentrequests@csumb.edu) must be the last recipient of the signed copy.

Your submission for the payment request is now complete. All parties will receive a confirmation email. The accounts payable payment request email will receive the completed request for payment processing.