Smart Source Step-by-Step Guide
Approving an Invoice

Procedure

1. From the **Smart Source** home page, select the **Action Items** link at the top of the UI. You will see, among potentially other things, that you have an invoice to approve. Select the **Invoices to Approve** link.

2. A new window appears, displaying a list of invoices awaiting your review/approval. Select the invoice number link for the document you wish to review.
3. The invoice is displayed. Select the Approvals tab to see the workflow for the invoice. Your name is displayed as the active approver for the invoice.

4. Select the Buyer Invoice tab to view the invoice information. Review the document for accuracy, pricing, etc.
5. If there is an issue with pricing or other matter that requires the attention of the Accounts Payable team, select the **Comments** tab. If no issues are identified, skip to the approval step.

6. Select the **Add Comment** link. A new window is displayed that allows you to capture comments.
7. Alert AP to the issue by emailing a representative from the department by selecting the **Add Email Recipient** link. *Note, Smart Source only allows for emails to be sent to specific system users and not group email addresses.*

![Add Email Recipient](image)

8. Select the **Add Comment** link.

9. To approve an invoice with no identified issues, select the Approve/Complete Step option from the **Available Actions** drop down menu and select the **Go** button.

![Approving an Invoice](image)

*You have successfully approved an invoice.*