Smart Source Step-by-Step Guide

Approving an Invoice

Procedure

 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.

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	Shop > Shopping > Dashboard > Shopping Home	Home/Shop	Action Items
			My Assigned Approvals
۱	Shop Ever	/thing	Invoices To Approve
B	Go to: advanced se	arch favorites forms non-catalog item quick order Brow	vse: suppliers categories contracts chemicals
血	Welcome to Drexel Smart Source	✓ Hosted Catalog Suppliers	?

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.

ñ	DREXEL UNIVERSITY Smart Source Procure to Pay				Anna Rivera 🔻 🛛 ★ 🛛 Action Items 💶 🛛 Notifications 🗎 🙀 0.00 USD						
Ì	${ m fill}$ Accounts Payable $ ight angle$ In	voices & Receipts) Search	For Invoices 🗢 👌 Approvals - Supplie	er Invoice No. 20140912-0834 (D	oc. No. V00000	34)					
١	• Back to Approvals			1 of 1 Results Ender: My Taylor Approvals			Invoice Number(s) V0000034				
₽	Invoice Number Supplier Invoice No. Supplier Name Buyer Invoice Approva	V0000034 20140912-0834 Carefusion Corp	Supplier Account No. Image Attachment Supplier Messages Attachments	(1) History		Available Actions App	rove/Complete &	: Show Next 💌 Go			
	Orientation: Horizontal Submitted Anna Rivera 9/12/2014 8:40 AM	Invoice Review Active & Active & Active a view approvers	OK to Pay Future →	Auto-Close-PO Future →	Finish						

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.

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						?
	Add Comment					
	Show comments for Invoice					
	Records Found: 0					?
		No comments have be No comments have be	een added			

6. Select the Add Comment link. A new window is displayed that allows you to capture comments.

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Records Found: 0	Email notification(s):	
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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 Com	ment						?
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- 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.



You have successfully approved an invoice.