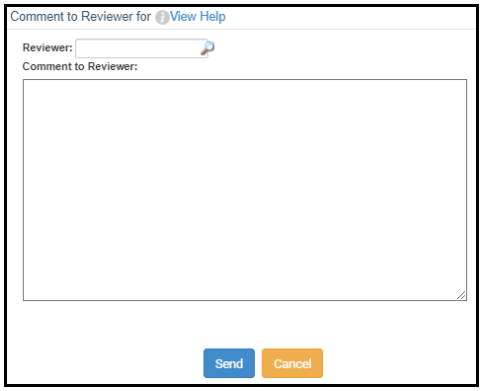
Last Modified on 09/28/2026 2:51 pm EDT

Using Reviewers

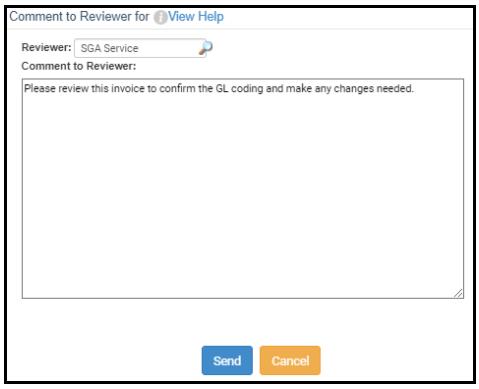
How to add a reviewer to a Purchase Order, Invoice, Journal Entry, or Payment batch:

- Enter information to create the entry.
  - Create a PO
  - Create an Invoice
  - Create a Journal Entry
  - Tag invoices and save a Payment Batch
- Once all required fields have been entered, click **Send to Reviewer** from the entry menu

  Send to reviewer .
- The **Comment to Reviewer** screen will appear:

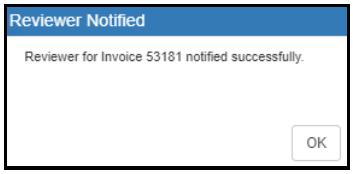


- Enter a username in the **Reviewer** box or click the looking glass tool to search for a user.
- Enter a comment to send to the reviewer. This text will appear in the notification email that the Reviewer will receive, indicating an entry has been sent to them for review:



- Click **Send**.

  The Reviewer will be notified via email of the entry awaiting their review:



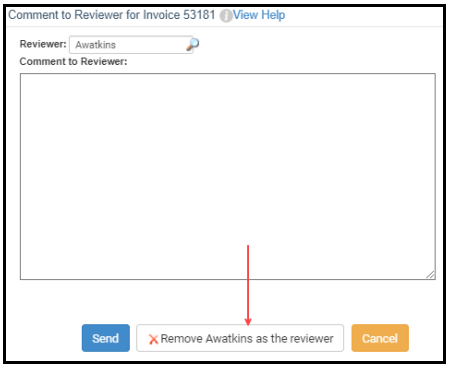
How to change the reviewer of a Purchase Order, Invoice, Journal Entry, or Payment Batch

From the entry (PO, invoice, etc):

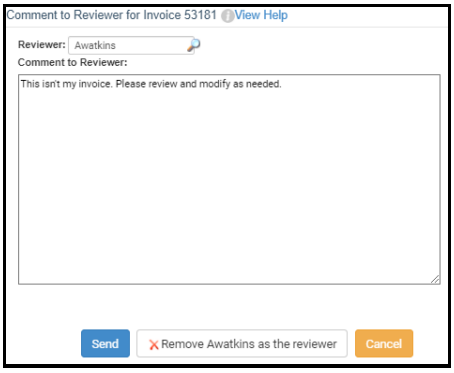
- Click **Change Reviewer** from the list menu:



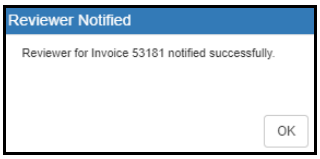
  - If removing the reviewer and returning the entry to the original create user:
    - Click **Remove (username) as the Reviewer**.



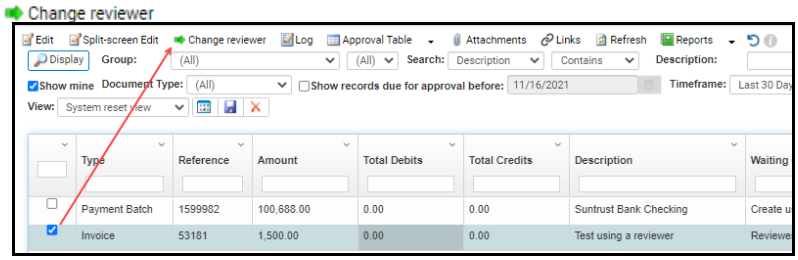
    - The entry will be returned to the original created user's queue, and they will be notified.
  - If sending the entry to a different reviewer:
    - Enter the user's username in the **Reviewer** box or click the looking glass tool to search for a user.
    - Enter a comment to send to the new reviewer. This text will appear in the notification email that the Reviewer will receive, indicating an entry has been sent to them for review:



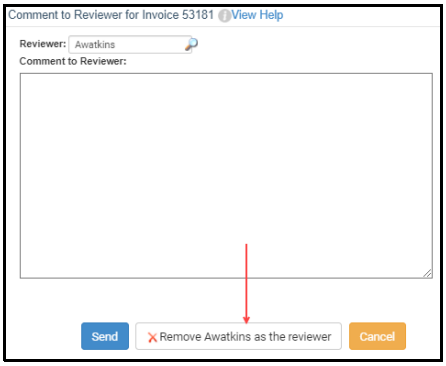
- Click **Send**.
- The Reviewer will be notified via email of the entry awaiting their review:



- From the Pending Approval List or Split-Screen edit view:
- Highlight the entry (PO, invoice, JE, etc)
- Click **Change Reviewer** from the list menu:



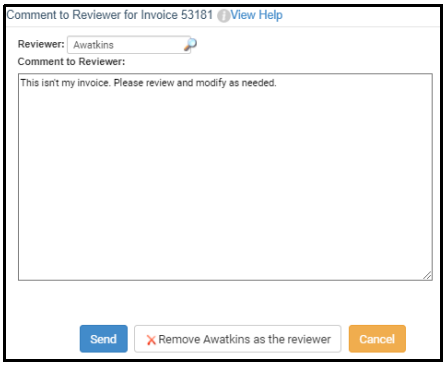
  - If removing the reviewer and returning the entry to the original create user:
    - Click **Remove (username) as the Reviewer**.



    - The entry will be returned to the original created user's queue, and they will be notified.
  - If sending the entry to a different reviewer:
    - Enter the user's username in the **Reviewer** box or click the looking glass tool to

search for a user.

- Enter a comment to send to the new reviewer. This text will appear in the notification email the Reviewer will receive, indicating an entry has been sent to them for review:



- Click **Send**.
- The Reviewer will be notified via email of the entry awaiting their review:

