


Using Reviewers

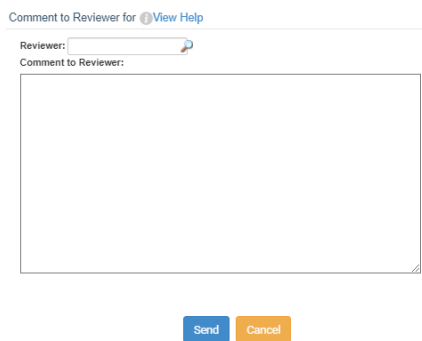
Last Modified on 02/21/2023 3:29 pm EST

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

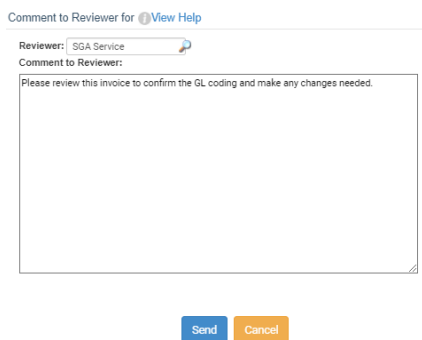
- Enter information to create the entry
 - Create a PO
 - Create an Invoice
 - Create a Journal Entry
 - Tag invoices and save a Payment Batch
- Once all required fields have been entered click “Send to Reviewer” from the entry menu:

 Send to reviewer

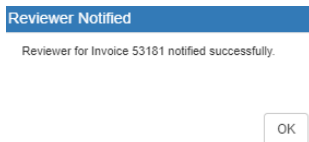
- The “Comment to Reviewer” screen will appear:



- 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 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:  Change reviewer

Save Change reviewer Log Preview Approval Table Add Approvers Delete Attachments

Vendor: 3 1953 FRANKLIN RD, SW ROANOKE, VA 24014 GEORGES

Address ID: PRIMARY

Group: ALL - Invoice Approval (Generic Invoices)

Reviewer: Awatkins

Invoice ID: 53181 Not Submitted

Invoice#: Test Reviewer invoice

o If removing the reviewer and returning the entry to the original create user:

- Click “Remove (username) as the Reviewer”.

Comment to Reviewer for Invoice 53181 View Help

Reviewer: Awatkins

Comment to Reviewer:

Send Remove Awatkins as the reviewer Cancel

- The entry will be returned to the original create user’s queue and they will be notified.

o 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:

Comment to Reviewer for Invoice 53181 View Help

Reviewer: Awatkins

Comment to Reviewer:

This isn't my invoice. Please review and modify as needed.

Send Remove Awatkins as the reviewer Cancel

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

Reviewer Notified

Reviewer for Invoice 53181 notified successfully.

OK

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

Edit Split-screen Edit Change reviewer Log Approval Table Attachments Links Refresh Reports

Display Group: (All) Search: Description Contains Description:

Show mine Document Type: (All) Show records due for approval before: 11/16/2021 Timeframe: Last 30 Day

View: System reset view

Type	Reference	Amount	Total Debits	Total Credits	Description	Waiting
Payment Batch	1599982	100,688.00	0.00	0.00	Suntrust Bank Checking	Create u
<input checked="" type="checkbox"/> Invoice	53181	1,500.00	0.00	0.00	Test using a reviewer	Reviewe

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Comment to Reviewer for Invoice 53181 [View Help](#)

Reviewer: Awatkins

Comment to Reviewer:

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Comment to Reviewer for Invoice 53181 [View Help](#)

Reviewer: Awatkins

Comment to Reviewer:

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