

Using Reviewers

Last Modified on 01/08/2025 11:36 am EST

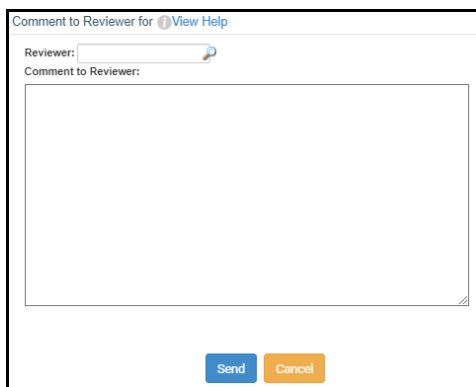
Using Reviewers

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

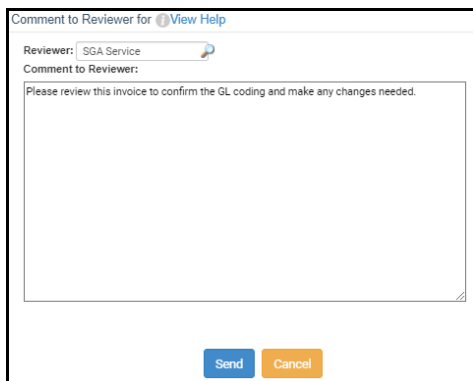
- Enter information to create the entry.
 - Create a PO
 - Create an Invoice
 - Create a Journal Entry
 - Tag invoices and save a Payment Batch
- Once all required fields have been entered, click **Send to Reviewer** from the entry menu

➡ Send to reviewer

- The **Comment to Reviewer** screen will appear:

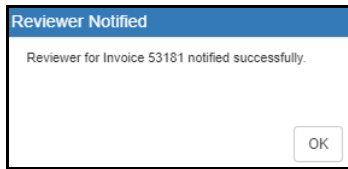


- Enter a username in the **Reviewer** box or click the looking glass tool to search for a user.
- Enter a comment to send to the reviewer. This text will appear in the notification email the Reviewer will receive indicating an entry has been sent to them for review:



- Click **Send**.

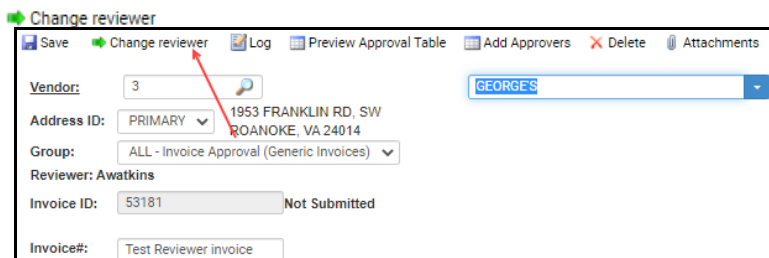
The Reviewer will be notified via email of the entry awaiting their review:



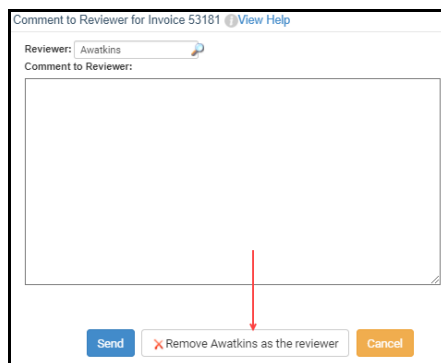
How to change the reviewer of a Purchase Order, Invoice, Journal Entry, or Payment Batch

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 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:

Change reviewer

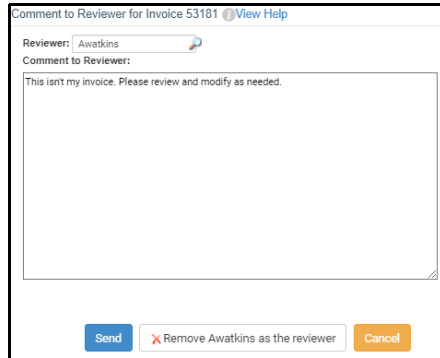
Type	Reference	Amount	Total Debits	Total Credits	Description	Waiting
Payment Batch	1599982	100,688.00	0.00	0.00	Suntrust Bank Checking	Create u
<input checked="" type="checkbox"/> Invoice	53181	1,500.00	0.00	0.00	Test using a reviewer	Reviewe

- 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:



The screenshot shows a dialog box titled "Comment to Reviewer for Invoice 53181" with a "View Help" link. It features a "Reviewer:" dropdown menu with "Awatkins" selected. Below this is a "Comment to Reviewer:" text area containing the text "This isn't my invoice. Please review and modify as needed." At the bottom, there are three buttons: "Send" (blue), "Remove Awatkins as the reviewer" (grey with a red X), and "Cancel" (orange).

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

