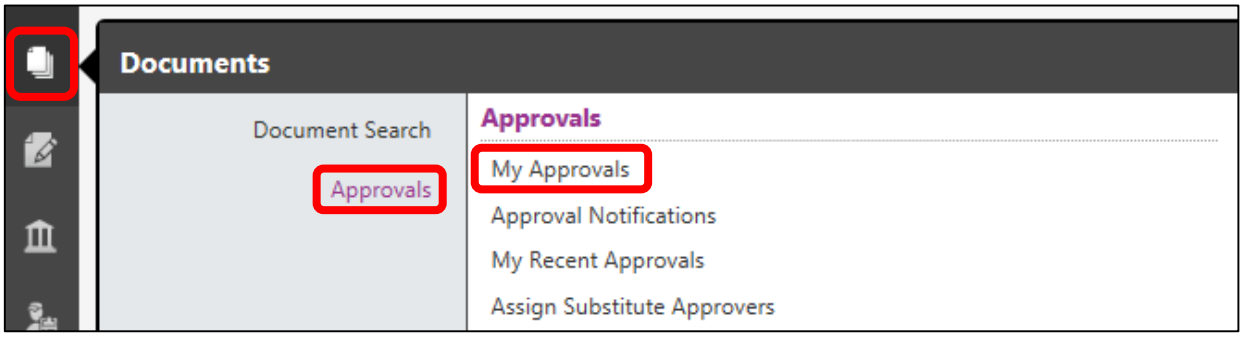
INVOICE REVIEW AND APPROVAL

Processing and Approving/Rejecting Invoices

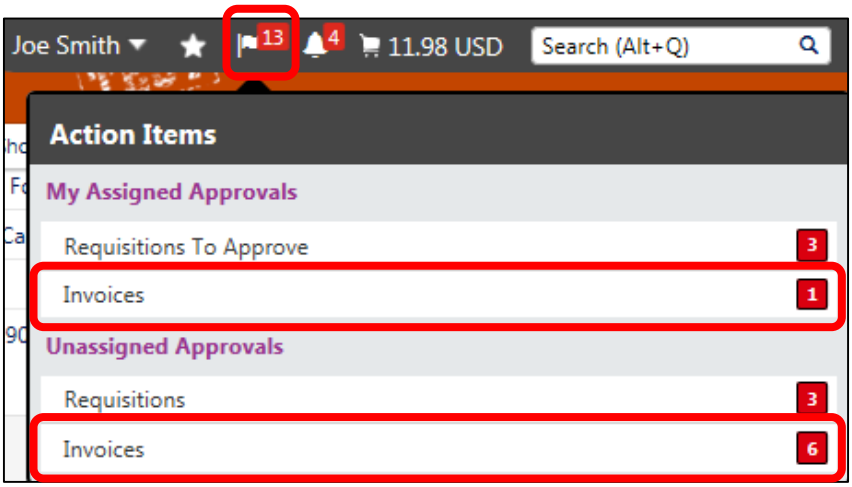
Approvers may need to review invoices that are out of tolerance, Non-PO, or handle some other type of invoice review scenario. Approvers also have the option to reject or cancel an entire invoice through the invoice workflow. Users do not need to reject or cancel individual line items.

Let's Get Started

1. Login to BennyBuy using your ONID ID and password.
2. From the BennyBuy home page, click on the **Documents** tab on menu located to the left. Click on **Approvals** and select **My Approvals**.



Alternatively, you can click on **Action Items Icon** in the upper right corner next to your name and select **Invoices** from **My Assigned Approvals** or **Unassigned Approvals**.



3. Find the desired invoice from the list of results. To help refine your results, you can use the filters on the left side panel. To open, click the **Invoice Number**.

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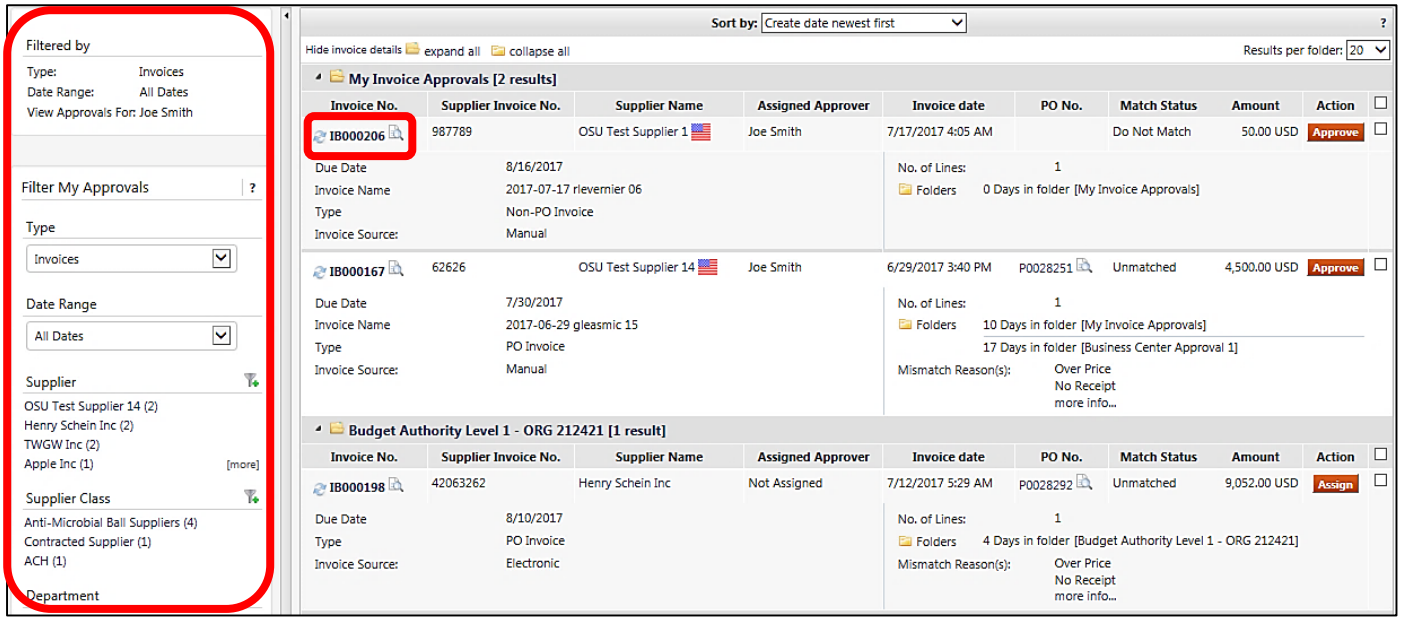
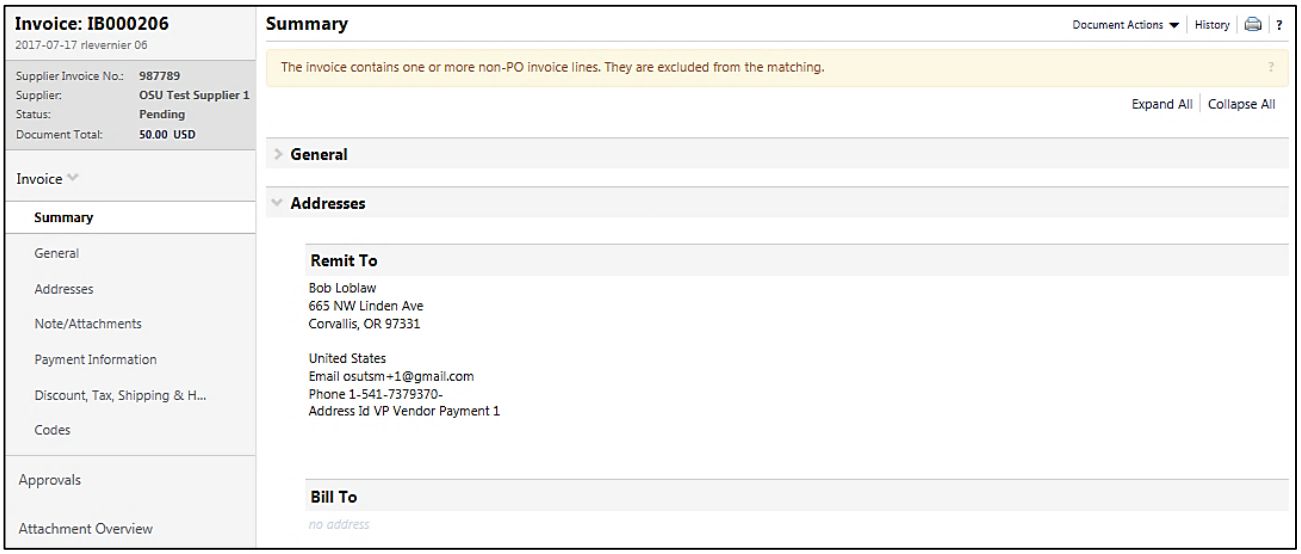


4. Review all components of the invoice to verify the information listed is accurate.

- **Invoice:** Allows access to a summary view, as well as other invoice details specific to Remit-To and Bill-To Addresses, Notes and Attachments, Payment Information, Index and FOAPAL elements, and Taxes/Shipping & Handling
- **Approvals:** Approval workflow, including current position within workflow
- **Attachments:** Attachments associated with the invoice
- **Comments:** View and add comments. All comments are time date stamped and historically recorded on this tab within the invoice
- **Matching:** View the matching status, method, and summary
- **Supplier Messages:** View and add messages. All messages are time date stamped and historically recorded on this tab within the invoice



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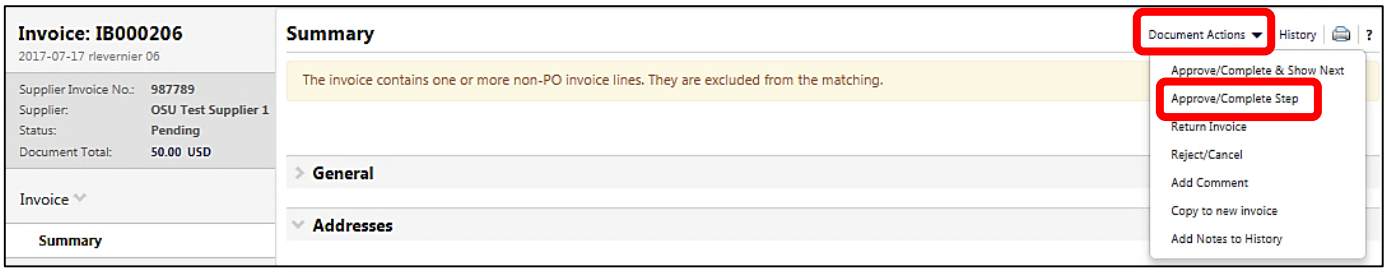
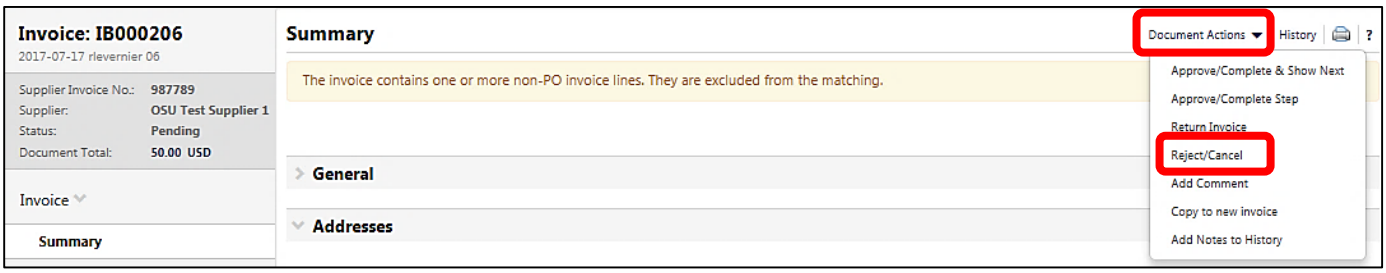
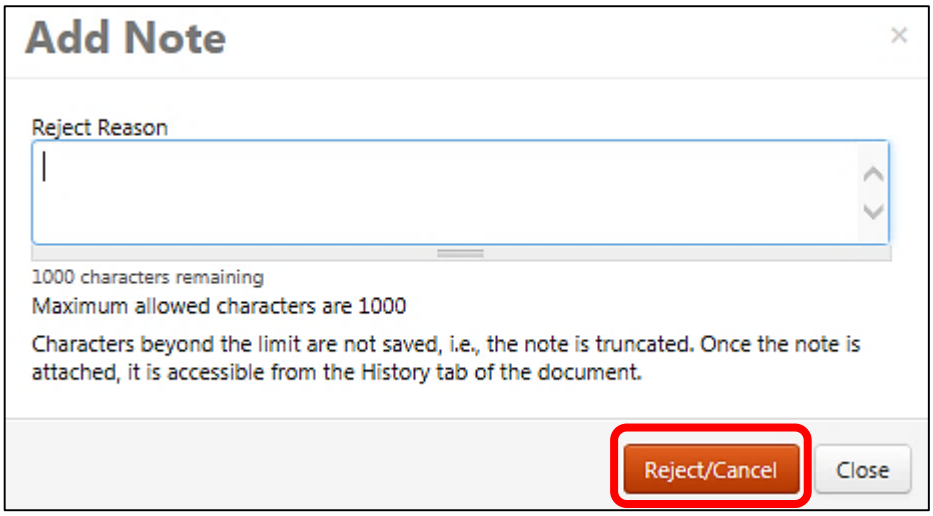
5. After the invoice has been reviewed in its entirety, scroll up to the top of the page and click on the drop down menu next to **Document Actions** located in the upper right hand corner. Select **Approve/Complete Step**.



Alternatively, you can reject an invoice by selecting **Reject/Cancel**. This will open a dialogue box and prompt you to enter a **Rejection Reason**. Once you enter a reason for the rejection, click **Reject/Cancel**.



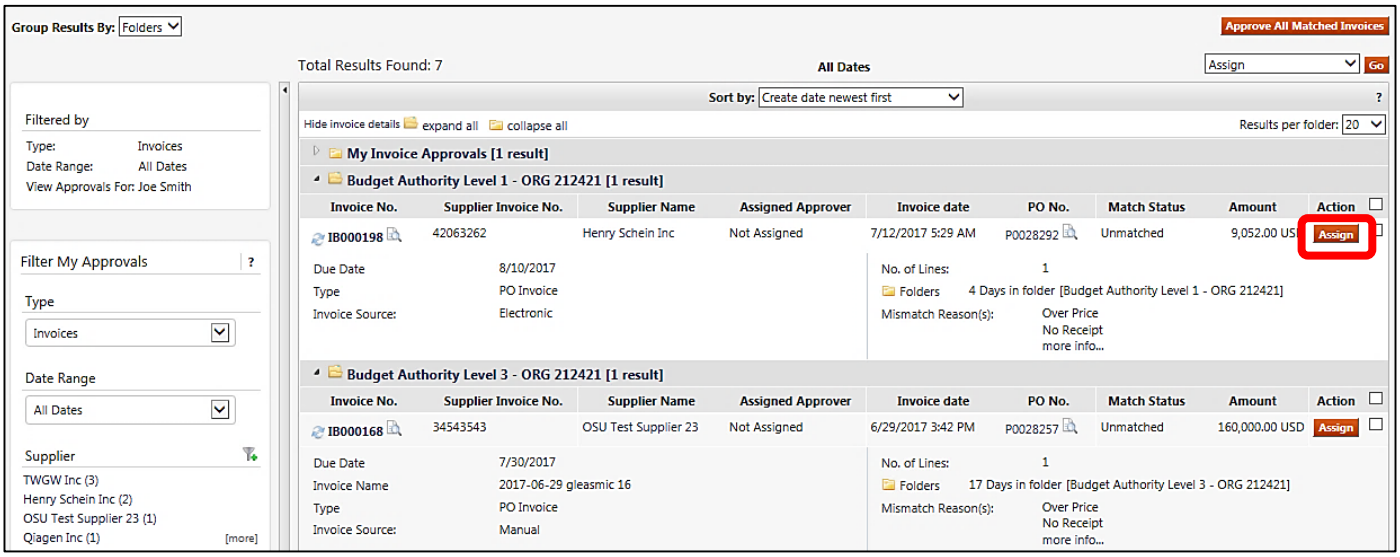


6. Once you approve or reject the invoice, you will return back to the invoice summary.

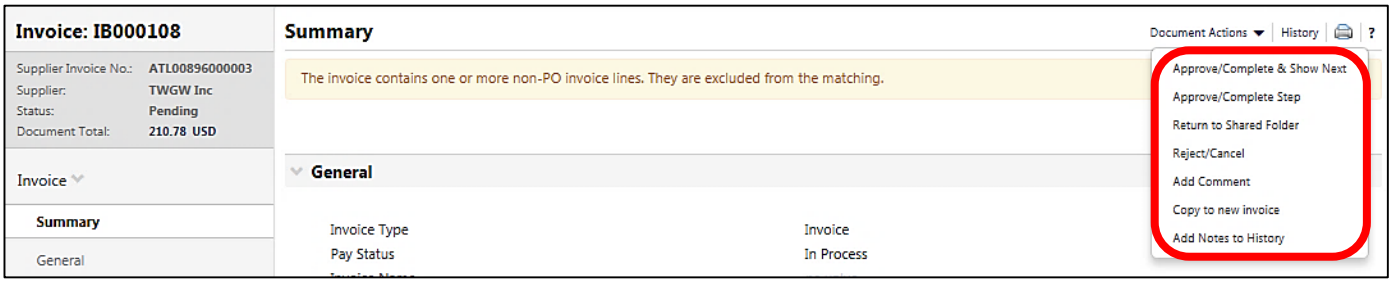
APPENDIX

Assigning Invoices to Yourself

1. Invoices that appear under **My Approvals** should already be assigned to you. In the case that an invoice is not assigned to you, click **Assign** along the corresponding invoice within the invoice results window.



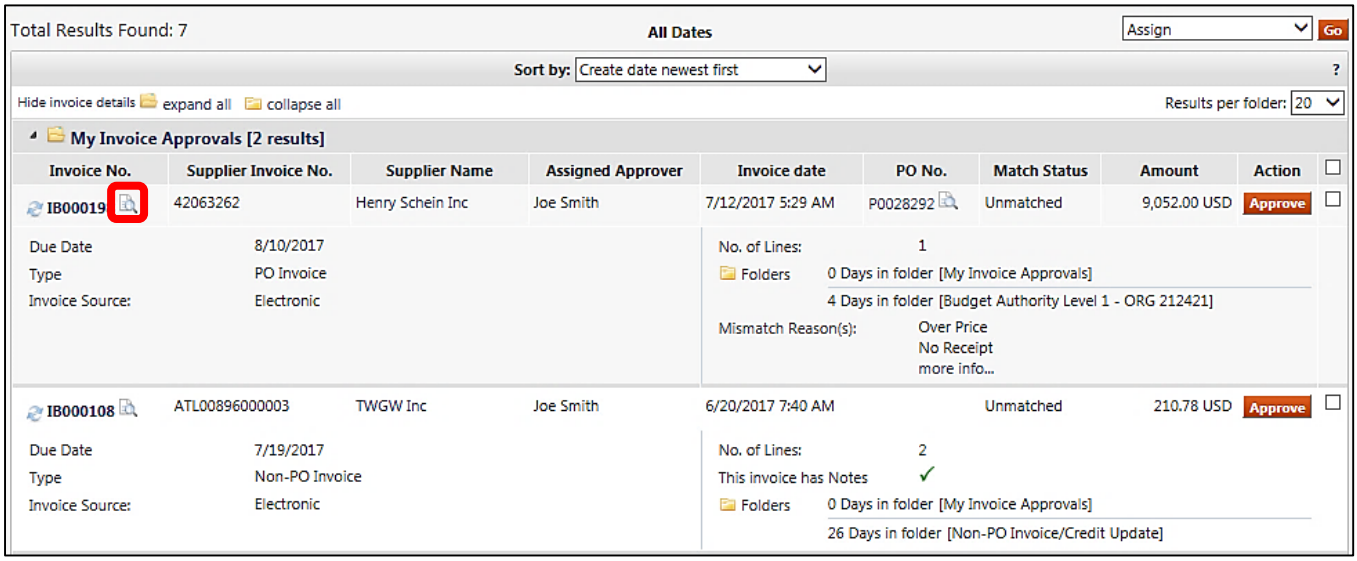
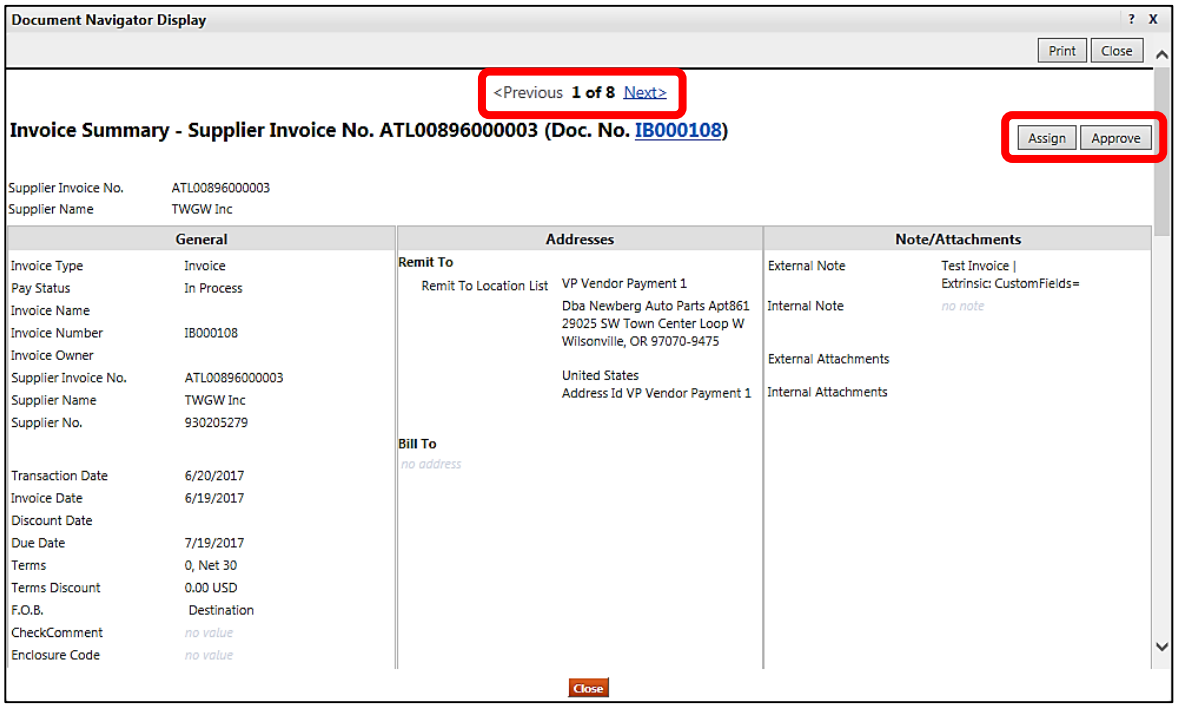
2. This allows you to take ownership of the document, which will feature additional options under **Document Actions**.



APPENDIX

Approving Invoices in the Preview Window

1. Within the **My Approvals** screen, you should see a list of invoices requiring your approval. To preview a invoice, click the **magnifying glass icon** located next to the invoice number.



2. Within the preview screen, you can either **Approve** the invoice or **Assign to Yourself** for further review. You should review all components of the invoice before approving. To approve an invoice in the preview window, click **Approve**. Using the **Previous** or **Next** links allow quick navigation through the approval queue from one invoice to the next without exiting the preview screen.