

Using Reviewers

Last Modified on 02/21/2023 3:31 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:

Comment to Reviewer for [View Help](#)

Reviewer:

Comment to Reviewer:

- 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:

Comment to Reviewer for [View Help](#)

Reviewer: SGA Service

Comment to Reviewer:

Please review this invoice to confirm the GL coding and make any changes needed.

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

Reviewer Notified

Reviewer for Invoice 53181 notified successfully.

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 GEORGES
Address ID: PRIMARY 1953 FRANKLIN RD, SW
 ROANOKE, VA 24014
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 receive a notification including the comment entered.

- 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:

[Change reviewer](#)

[Edit](#) [Split-screen Edit](#) [Change reviewer](#) [Log](#) [Approval Table](#) [Attachments](#) [Links](#) [Refresh](#) [Reports](#)

[Display](#) Group: (All) (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
<input type="checkbox"/>	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	Review

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

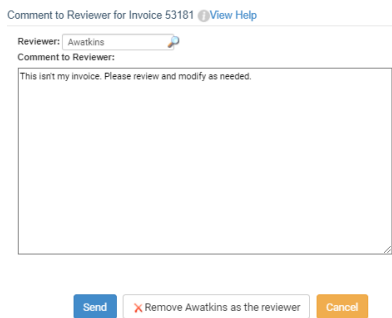
- Click “Remove (username) as the Reviewer”.



- The entry will be returned to the original create user’s queue and they will receive a notification including the comment entered.

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:



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

