Buyer's Guide

This guide will review how to shop, create requisitions and track your requisitions, orders and invoices

Contents

Logging In

1. Open your web browser
2. Log into WMU School of Medicine portal and find the link to OneSource under Applications
   OR
3. In the address field, type https://wmed.unimarket.com
4. The WMU School of Medicine login page will appear
5. Enter your WMU School of Medicine username and password and login.
6. Your OneSource home page will appear.

If you are a first time user and experience any issues logging in, please contact purchasing@med.wmich.edu. For existing users, submit an IT Support ticket for login issues. For functionality issues, reference the eProcurement FAQ document and other user guides found under the WMed Support & Knowledgebase or https://support.med.wmich.edu.

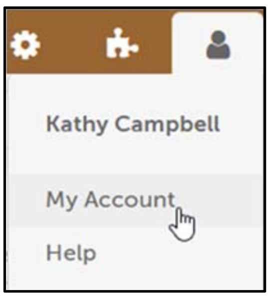
The Buyer Role in OneSource

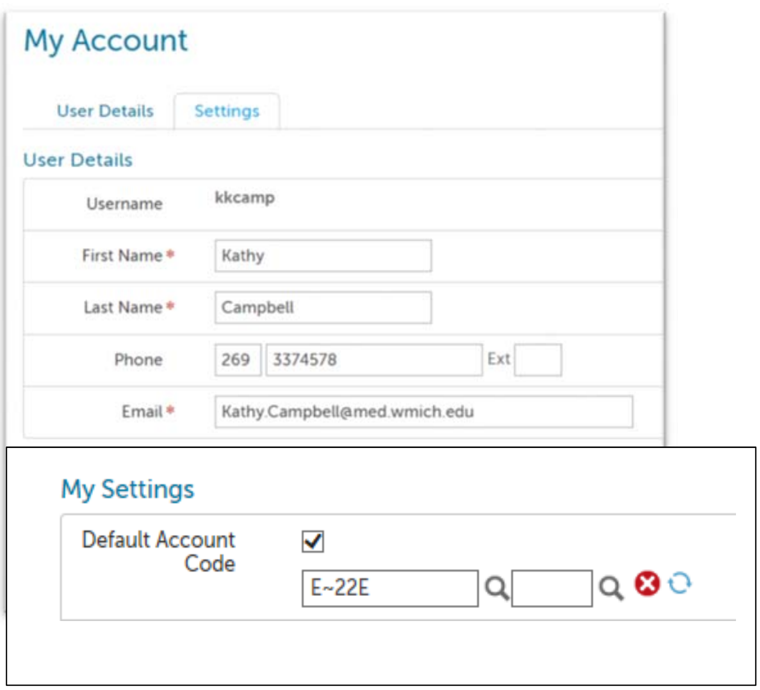
The Buyer role in OneSource is assigned to all employees. Buyers in the OneSource eProcurement system have the permissions for the following:

- Access suppliers in the online marketplace created specifically for WMU School of Medicine
- Search and browse the contracted pricing catalogs from the WMU School of Medicine suppliers
- Fill an individual shopping cart for checkout
- Create requisitions for purchases against the WMU School of Medicine budget
- View the status and approval path of requisitions
- View and export reports on purchase orders
- Indicate that the goods or services were received and are approved to pay
- View and track invoices against the purchase orders

My Account Settings

When you initially log into OneSource it is recommended that you check your account details. You can find the My Account page under the silhouette at the top right of the screen. Within the My Account page you can update your preferred first and last name, phone number and email address as well as set your default accounts. Setting your default account codes will make the checkout process more efficient if you use the same accounts repeatedly. It is NOT recommended that you set all parts of the account as a default as you may forget to change the Account for different types of purchases. You can also access the online Help provided by Unimarket in the Help page under the My Account menu.





Key Concepts

- There are two types of suppliers found in OneSource:
  - **Catalog Supplier** – supplier who has a catalog in the OneSource marketplace or provides roundtrip/punchout access to their ecommerce site from OneSource.
  - **Non-Catalog Supplier** – supplier who does not have a hosted catalog on OneSource or provide roundtrip/punchout access to their site and instead requires products to be manually created on OneSource.
- Products to be ordered from a supplier can be accessed in one of three methods:
  - **&** **Hosted Catalog** – supplier products are "hosted" on the OneSource website, meaning you do not leave the OneSource website to search and order these products. Hosted Catalogs are identified with the folder icon.
  - **&** **Roundtrip/Punchout** – supplier products are found on the suppliers' ecommerce website with a direct link to and from OneSource. Roundtrip/Punchout functionality will be identified with the globe icon. A new window or tab will open in your internet browser and you will be signed into the WMU School of Medicine account on the supplier's ecommerce site.
  - **Non-Catalog Items** – products requiring information to be entered manually. Even Premium Suppliers could have products that can be entered manually if a product is not found in any of their catalogs.

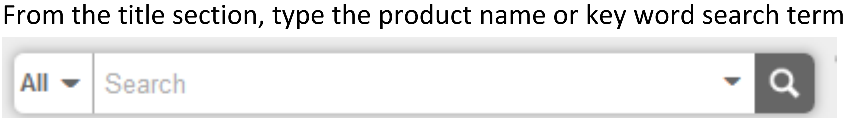
Searching

Products or Suppliers can be located by searching the loaded catalogs of suppliers using the search options detailed below.

Product Searching

Product searches can be completed using the search function in the title section of OneSource. The loaded catalogs, index catalogs (products pointing to a punchout site) or supplier key words will be searched. This search field will also search for supplier names. To search in this method, complete the steps listed below:

1. From the title section, type the product name or key word search term in the search field.



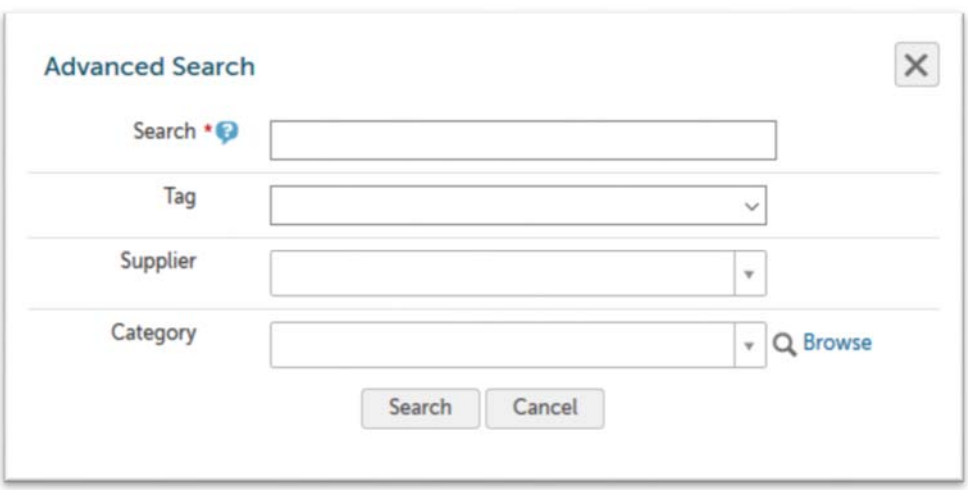
2. Click **Search**.
3. Any products, supplier name or key word that match the criteria will appear in the search results.

Searching Tips

- Search terms can be combined using the words **AND** and **OR**.
  - **AND** will search for both words/phrases.
  - **OR** will search for one word/phrase or the other.
- Wildcard searches can be performed if the exact search word/phrase is unknown.
  - **?** will replace a single character; i.e. “Te?t” could be Test or Text.
  - ***** will replace multiple characters; i.e. “Test*” could be Tester or Testing.

Advanced product searching allows the search to be narrowed by Supplier Category, Supplier, or Product Category.

1. Click the down arrow at the right side of the search bar in the search area.
2. From the Advanced Product Search window, type the name of the product you are searching for in the Search field.
   NOTE: Any field marked with a red asterisk is a required field.
   Any time you see a blue question mark, a help bubble will appear when resting your cursor over it.
3. If desired, select a **Tag** or **Supplier** from the drop down list and/or type in or select a Product Category t narrow your search results.
4. Click **Search**.
5. Any products that match the criteria will appear in the search results.
   NOTE: Results will not return products from roundtrip suppliers unless they have additional search functionality enabled such as an “Index Catalog”.



Supplier Searching

If you are searching for a specific supplier, there are multiple ways to locate the supplier and the product.

- From the Dashboard tab on the menu bar, click on the **Supplier icon** in the Recently Used Suppliers list of the Information Section.
- From the Dashboard, click **View all suppliers** at the bottom of the Recently Used Suppliers list of the Information Section.
- Click on the Marketplace menu on the menu bar, click **View Suppliers**.

NOTE: If there is a supplier nickname or search term that you would normally use, please suggest it to purchasing to be added.

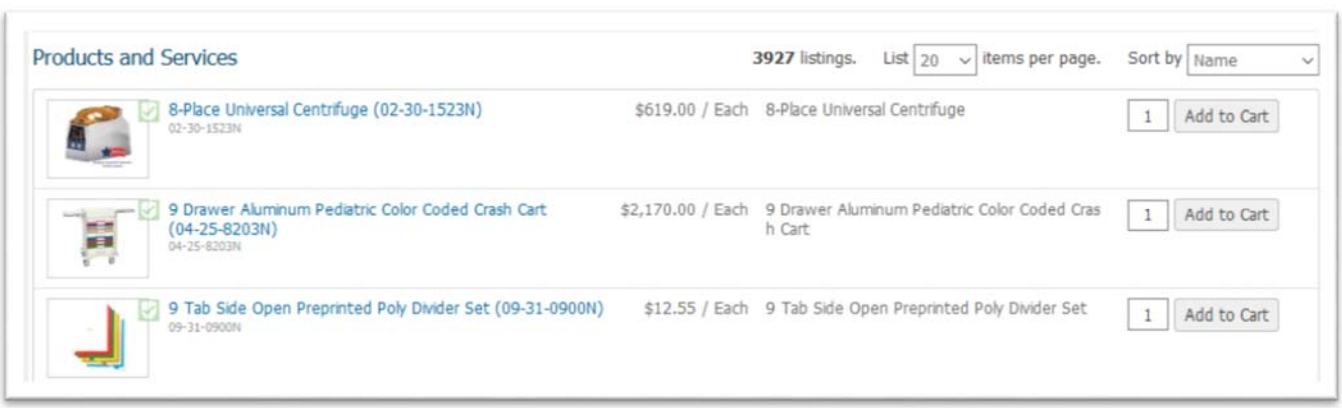
Once you are on the Marketplace page you can search for the supplier by name.

Filling your Shopping Cart

Shopping by Catalog

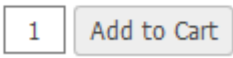
If a hosted catalog, folder icon, appears (**or**) after clicking on the supplier name or icon, you will be selecting products from the supplier's hosted catalog on OneSource. The supplier may have multiple catalogs that appear.

1. Click on the **supplier catalog** that you wish to shop.
2. The products available within the catalog will appear.



3. Browse or page through the products available or use the search bar to search within the selected catalog.
4. The sort option of products defaults to relevant search term Name but can be changed to Code, Lowest Price, or Highest Price.

5. Clicking on the product title or product image if you wish to see more information about the product.
6. When you have decided on a product to order, type the quantity in the Quantity field to the left of the Add to cart button.



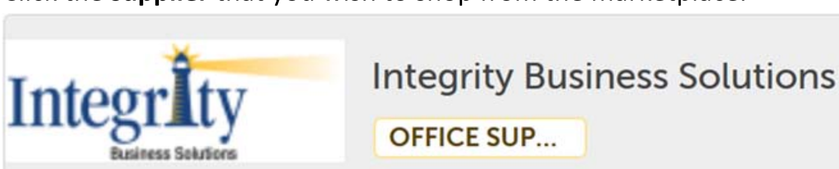
7. Click the **Add to cart** button.
8. A confirmation message will appear and the shopping cart will update to reflect the total number of products.

9. Repeat steps #3 – 9 for as many products as you need to order from this supplier.

Shopping by Roundtrip (Punchout)

If a globe icon appears (or) after clicking on the supplier name or icon, you will be sent to the supplier's website and logged into the WMU School of Medicine pricing catalog.

1. Click the **supplier** that you wish to shop from the marketplace.



2. Click the **roundtrip icon** or **supplier name** to go to the supplier's website.

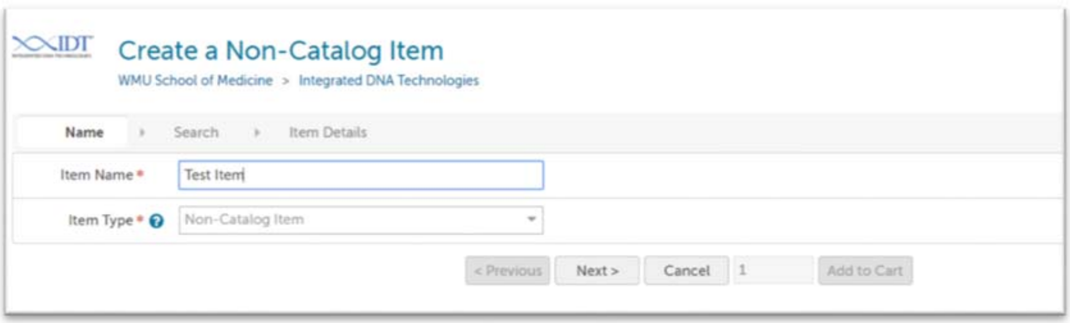
3. Each supplier's website will be different. Browse and search for products as if you had come to the supplier's website directly.
4. Add products that you wish to order on the supplier's website by clicking the **Add button**.
   NOTE: The terminology of the button to click will vary based on the supplier's website.
5. When finished shopping, click the **Checkout** or **Submit Requisition button** to return to OneSource.
   NOTE: The terminology of the button to click will vary based on the supplier's website.
6. You will be returned to your shopping cart in OneSource with the products you had selected. The additional tab or browser window that opened for the supplier's punchout site should close automatically. If this does not happen, submit an IT Support ticket. .

Shopping with Non-Catalog Items

If a supplier does not provide a catalog, you will need to create a Non-Catalog Items. You will need to enter the product's information in the Non-Catalog form.

1. Click the **supplier** that you wish to shop.
2. Click the **Create a Non-Catalog Item** link to enter the products details.

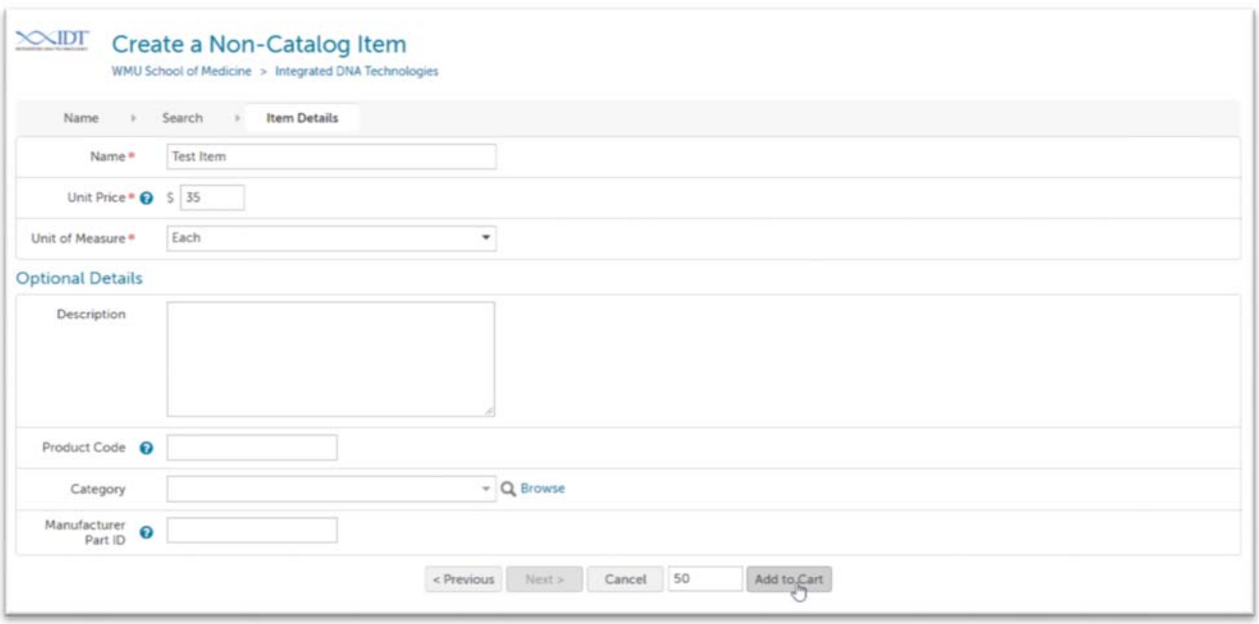
3. From the Item Name field, type in the name of the product to be ordered.
4. Click the **Next button**.



5. Any products similar to what you entered that are in a contract pricing catalog will appear on the screen. If one of these products could be ordered instead, type in the quantity and click **Add to Cart**. If the products displayed are not what you need, click **Next** at the bottom of the screen to continue defining the product details.
6. Type in the product information.
   NOTE: Fields marked with a red asterisk are required fields
   a. ***Name** - will be filled in from your previous entry
   b. ***Unit of Measure** - type in the Unit of Measure or select from the drop down list. Each (EA) is the most common unit of measure.
   c. ***Unit Price** – type in the single unit price of the product.
   d. **Description** – description of product to ensure the supplier knows what you are ordering. The more detail, the better to ensure order accuracy.
   e. **Product Code** - supplier's product number or SKU.
   f. **Category** – These are the UNSPSC international standard commodity codes. Type in the category code or select it by starting to type a commodity and selecting from the dynamic list that will appear.
   g. **Manufacturers Part ID** – If the supplier is a reseller, you may enter the additional product ID number that refers to the manufactures product.

7. Next to the Add to cart button, type in the quantity to be ordered.
8. Click the **Add to cart button**.
9. You will be returned to the product screen to enter the next product line and a notification on screen will let you know that the product was added to your cart.

10. Repeat steps # 3 – 9 for each product line that wish to order.

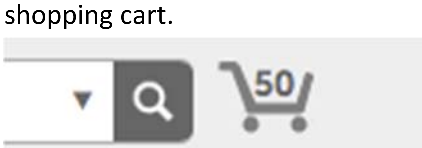


Shopping Cart

The shopping cart appears in header bar at the top of the page. The number of products will appear in the cart.

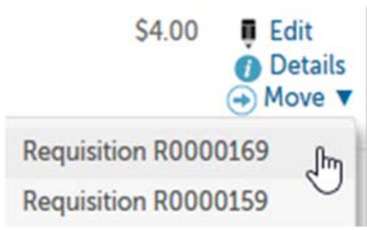
Reviewing the Shopping Cart

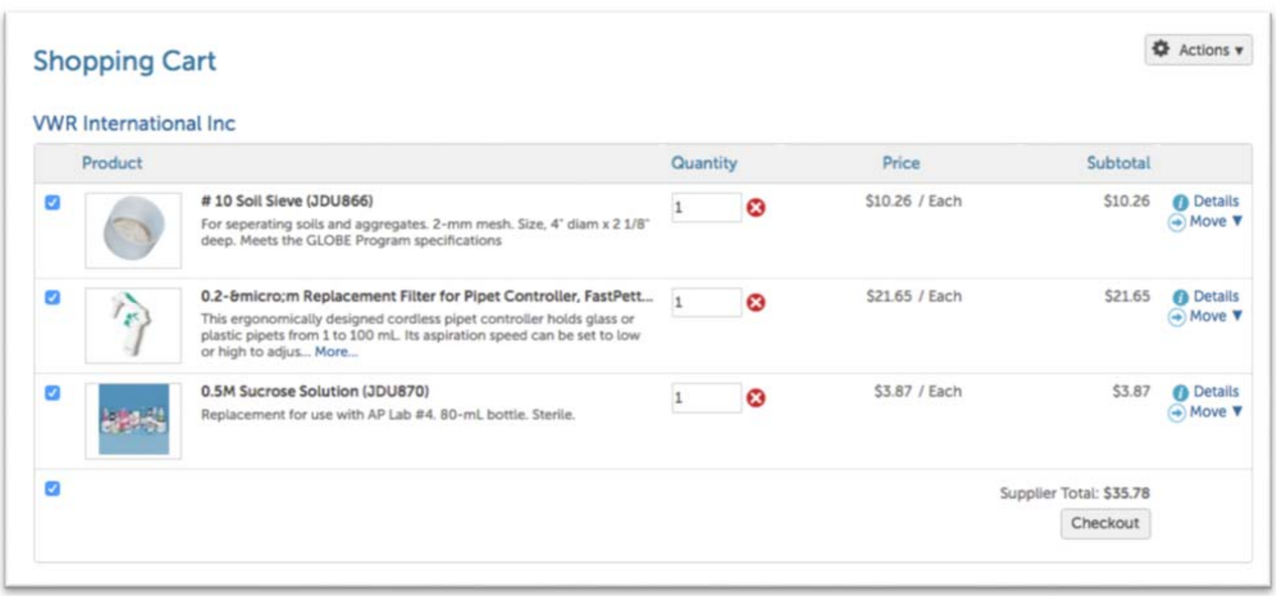
1. Click the **shopping cart icon** to view the products that have been added and be taken to your shopping cart.



2. All products in the cart will appear by supplier with an individual supplier total.
3. To adjust the quantity of any product, type the new quantity into the Quantity field of the product. The line item subtotal will update as you go.
4. To remove any product from the cart, click the **red X icon** next to the Quantity field.

5. To remove all products from the cart, click **Clear Shopping Cart** in the upper right hand portion of the screen.
6. You are able to edit any of the Non-Catalog or Manual products that you have entered if you notice any incorrect information. Use the **Edit** button to the right of the Subtotal.
7. The **Move** button will allow you to move the product from your cart to a saved or incomplete requisition. From the requisition view, the **Move** button will allow you to move the item to a different requisition or back to your cart.

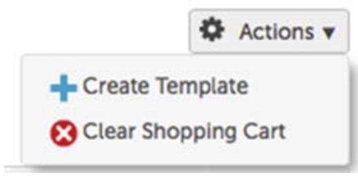




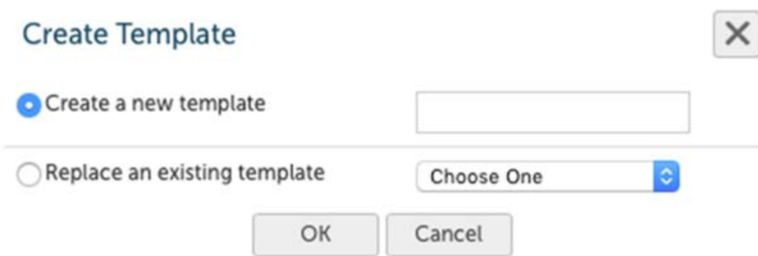
Creating a Template of Frequently Ordered Products

If you have products that you regularly order, you can create a template that can be reused every time you need to order those products. The products to be added to the template need to be in the cart before proceeding. This is a great way to save time when you enter the product manually on a frequent basis.

1. From the cart screen, click the **Create Template** in the Actions menu.



2. The Create Template screen will appear.

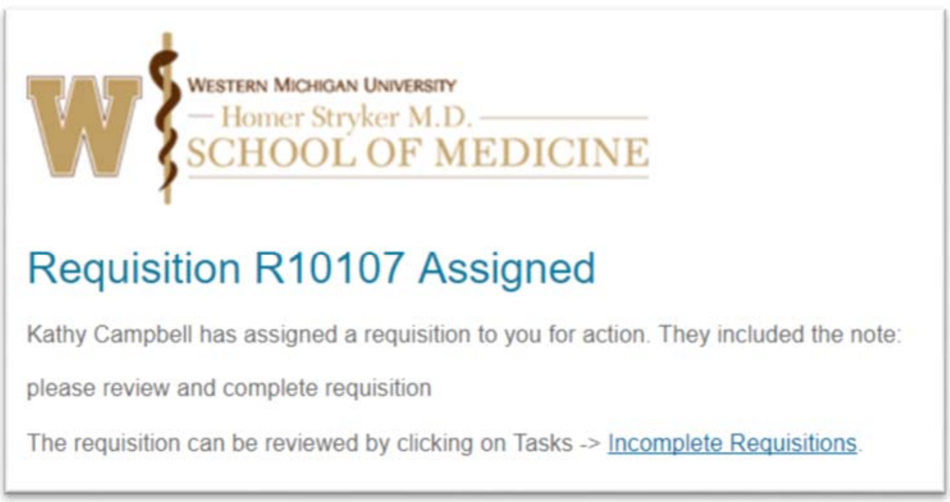


3. The radio button for Create a new template will be selected. Type a name for the template in the field to the right.
4. If a template has already been created and needs to be changed, select **Replace an existing template** and select the template from the list.
5. Click **OK**.
6. Once a template has been created, it can be accessed by clicking on **Marketplace** in the menu bar and selecting **Template Orders**. The following options are available:
   a. **Use** – click **Use** to add the products to your cart.
   NOTE: Doing so will replace anything that is currently in the cart.
   b. **View** – click **View** to see all products in the template.
   c. **Delete** – click **Delete** to permanently delete the template. A confirmation message will appear prior to deletion to confirm your selection.

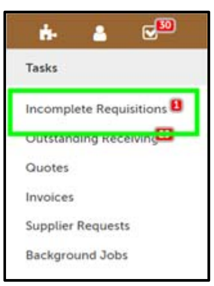
NOTE: When you use a Template Order, the products will replace any current products that you have in your shopping cart.

Incomplete Requisitions from Browsers

The users in your department that do not have account classification authority (i.e. Students) will only be able to shop and reassign their incomplete requisitions to you as the buyer. As the buyer, you will be alerted by email from OneStop@med.wmich.edu when an incomplete requisition has been assigned to you. See example email alert below.



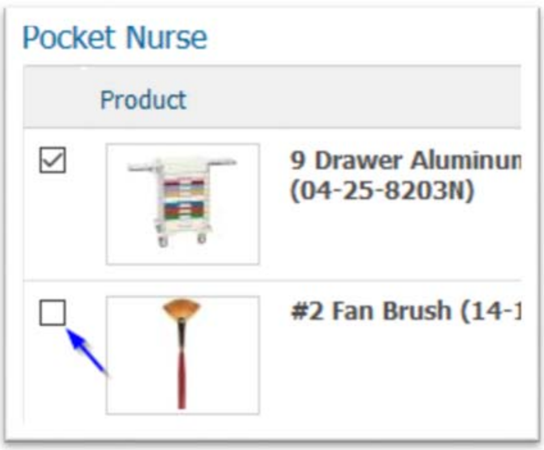
To find and process this incomplete requisition, go to the Tasks menu and Incomplete Requisitions.



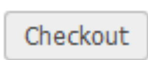
In the Incomplete Requisitions page, you will see all requisitions that have been assigned to you for completion. Click the requisition number to open and review the details or click Checkout to begin the checkout for completion of the requisition and routing for approval.

Creating a Requisition

1. Any products appearing in the shopping cart with a check in front of the product will be forwarded on to the checkout screen. If you do not wish to order a product yet but don't want to delete it from the shopping cart, click the **checkbox** to remove the check.



2. Click Checkout to start the checkout and requisition process for the items being purchased for this supplier.



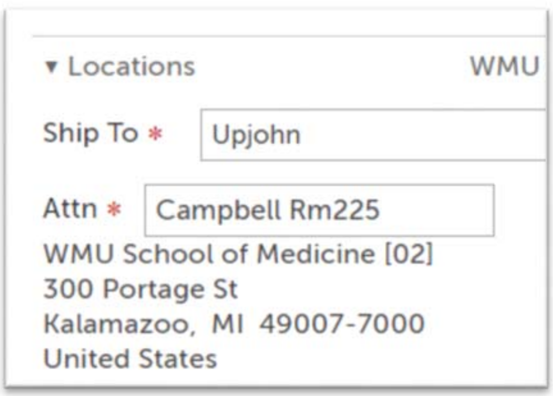
Locations

The shipping and billing addresses will be selected in the Locations section of the checkout screen. These addresses are preloaded in OneSource. If you select another location and complete the checkout, your selection will be your new default for your next checkout process. The locations were names after the departments for ease of use when searching for a location in the drop down options. You can type the first letter of the location to navigate the dropdown list easily.

Attn Field

The Attention To field (Attn) is very important in your checkout process to ensure the accuracy of the delivery by the supplier or the WMU School of Medicine Central Receiving department. The most pertinent information for delivery should be first (left to right) in the "Attention To" field - i.e. Recipient last name / lab or room # / phone extension.

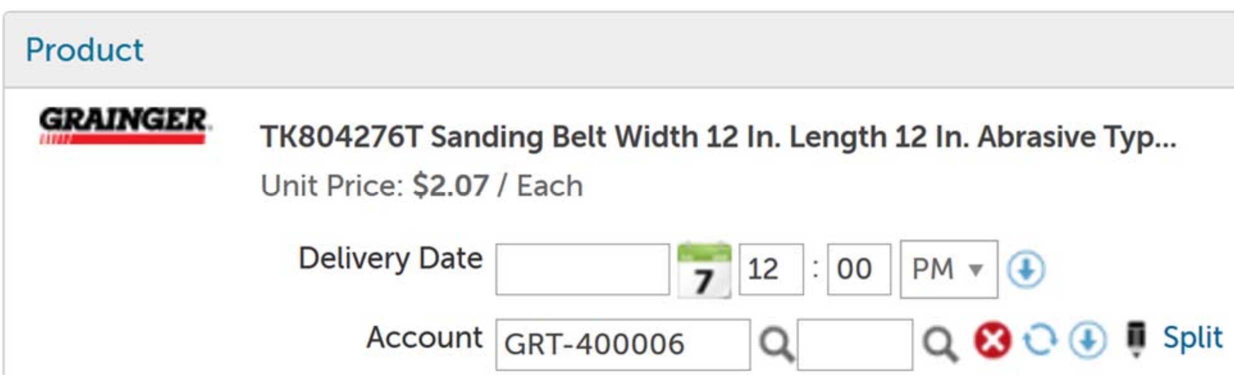
Example:



Checkout Items

The items that you selected from the shopping cart will be listed as separate lines in your checkout items. Each line item will show the product name, Unit Price/Unit of Measure, Quantity and Subtotal. You may remove the line items from the checkout screen using the buttons to the right of the products.

3. Use the Account fields to enter the value of the two required parts of the accounting classifications need to apply your order against the correct budget: Fundand Account.
   a. If you have set your default accounts in your My Profile Settings page, these fields will auto populate in every checkout instance. It is not recommended that you default the Account field as that should change for each type of purchase that you are processing.
   b. You can begin typing the number or description of the Fund element value and a dynamic list will appear which you can use to select from.
   c. Use the magnifying glass to open a search window if you have trouble finding the accounting classification codes that you are trying to allocate for the line item.
   d. You can use the Copy Down button to repeat your selected accounting classification codes to each line below.
4. Delivery Date
   a. Delivery Date is an optional field on the line item that can be filled in as a suggested or preferred delivery date to the vendor. For critical deliveries, please follow up with the supplier directly to confirm the delivery date.



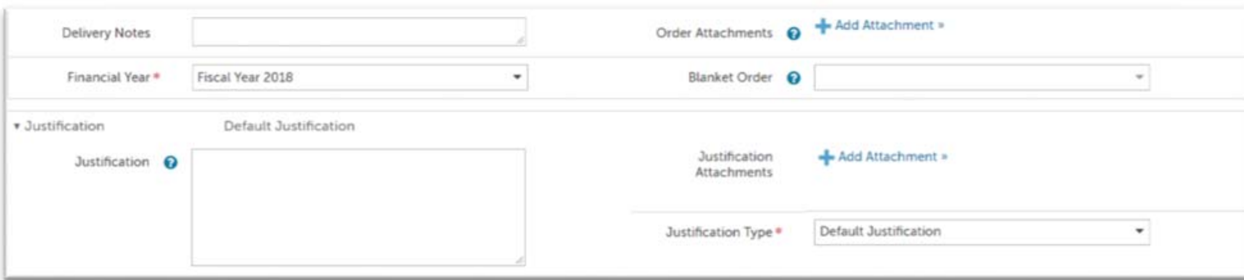
Notes and Attachments

5. Enter any notes or attach any related documents to your order in the Justification or Notes and Attachments section of the checkout screen.
   a. The Justification Notes and Attachment are for internal justification use and will not be sent to the supplier. The Justification Notes will always be on the requisition and not carried over to the Purchase Order.
   b. The Delivery Notes and Order Attachments are for sending information to the supplier and will be sent to the supplier with the final PO.

NOTE: If a different address is needed for delivery, alert the system administrators in Purchasing so they can add the new location to the prepopulated list. Adding a different address in the delivery notes will not guarantee that the order is delivered to that address.

c. You can attach as many documents as needed with a single size limit of 50 megabytes

d. You can also attach a file in the Order Attachments and chose not to send it to the supplier.



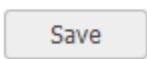
Organization Selection

Under the Justification Notes section of the checkout screen will be an Organization section. This section is for the visibility and receiving capabilities across your organization to the supervisors and other users. WMU School of Medicine has separated the Organization using the authorization workflow as a guideline.

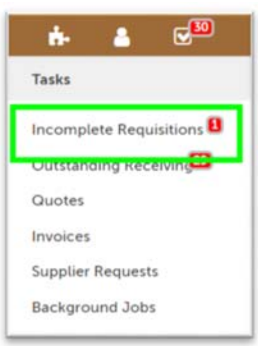
6. Select the Organization that is appropriate for your purchase. This will most likely match the funding classification selected for your line items. Selecting the correct Organization unit will allow others in your organization to view and perform any necessary receiving actions for this purchase order. You may only have one selection or you may have many depending on your access in OneSource.

Saving a Checkout

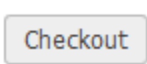
7. If you need to enter more information and must come back to the checkout screen, you can save your checkout progress.



This will create an Incomplete Requisition that can be seen in the Task Menu.



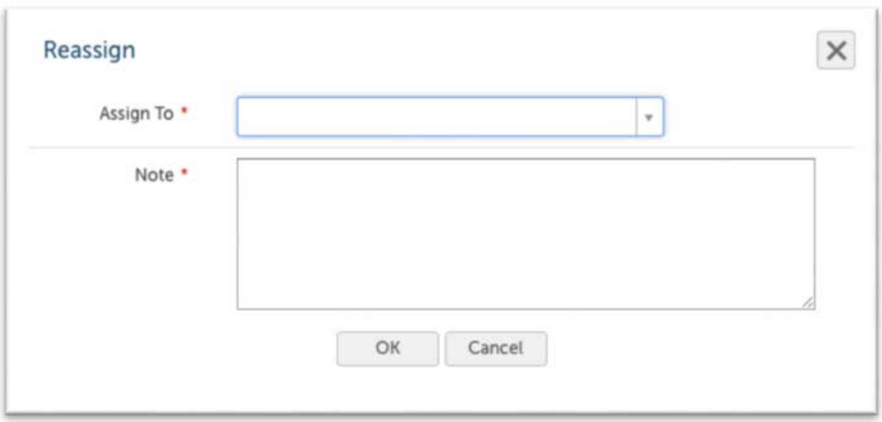
1. Once your checkout screen is complete with all of the needed information, click Checkout.



Reassigning your cart

1. If you need to send this requisition to another buyer for more information or to complete the requisition and process for approval routing, click **Reassign**

2. A popup will prompt you to reassign your requisition to a Buyer. You can also include any important notes to the Buyer here.



A confirmation message will appear stating that the items have been forwarded to the designated individual. The Buyer will receive an email notification and the Incomplete Requisition will appear in the Tasks Menu for the Buyer to complete the requisition and route for approval. You can see the incomplete requisition status if you look at the View Requisitions page.

Accounting Account Classification Security Check

If you do not have access to purchase using the Fund you selected, you will receive the below error and will not be able to continue.

Note: you will not lose the products that you have added to your cart, they will be available in your shopping cart. It is recommended to Save your checkout to preserve the information entered on the checkout screen.

Tracking Requisitions

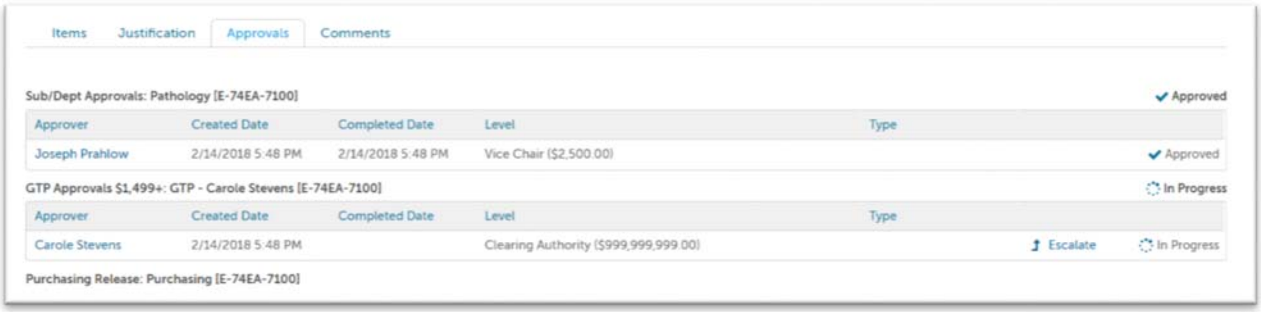
After you successfully create a requisition you will be able to monitor the progress from your Dashboard on OneSource or from the Requisitions page under the Orders menu.

1. Click the Home button.

2. Requisitions that have been submitted can be viewed in the Requisitions in Progress area of the information section of the Dashboard.

Requisitions in Progress			
Grainger	RQ000145	10/9/2015 3:35 PM	$3.34
Grainger	RQ000135	10/8/2015 2:25 PM	$15.50
VWR Internation...	RQ000126	10/8/2015 10:18 AM	$71.63
Pocket Nurse	RQ000122	10/7/2015 11:18 AM	$150.00
			View all requisitions

3. Click on the **requisition** from the list.
4. You may also click **View all requisitions** to see all of your requisition.
    a. The View Requisitions screen will appear.
    b. You can see the header level requisition information as well as the current approver(s)
    c. The top portion of the screen will allow you to search for a requisition. Select from one or more of the following search options and the click the **Search button**.
        i. **Requisition Number**
        ii. **Supplier**
        iii. **Created Date**
        iv. **State**
        v. **Buyer**
        vi. **Organization Unit**
    d. To select a requisition, click on the **Requisition number** from the list.
5. To view the approval status of the requisition, click on the Approvals tab. You will see the approvals that have happened, who the requisition is with now for approval and the next approval steps needed before the order is created.

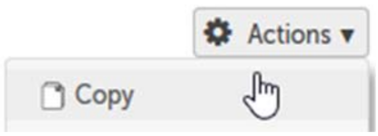


6. The various approval statuses include:
   a. **Approved -** approved and advanced to the next level to an order
   b. **Declined** – was not approved and sent back to buyer
      i. Declined requisitions can be copied and edited for resubmittal by the buyer who originally created the requisition
   c. **Escalated** – skipped an individual to advance to next level
   d. **In Progress** - current level of approval
7. Once a requisition has been completely approved, a purchase order will be generated and sent to the supplier. An email with the purchase order number and details of the purchase order will be sent to you as the buyer confirming that the order was sent to the supplier. If you used the “reassign” function, the email will be sent to the buyer that you selected and you as the “on-behalf of”.

Reprocessing a Declined Requisition

If your requisition is declined for any reason you will receive an email notification with the requisition number and details along with any notes that the declining approver provided. Reprocessing a declined requisition is easy. Follow the below steps to Copy and resubmit the requisition with changes.

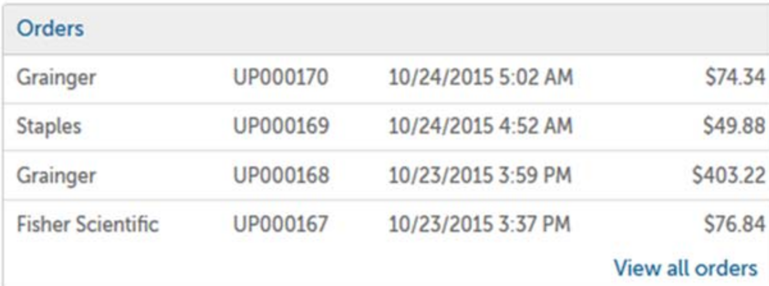
1. Click the link to view the declined requisition from declined email notification or go to View Requisitions and search by Declined in the state search filter.
2. At the top right of the requisition view page, under the Actions menu, you will the option to Copy the requisition.



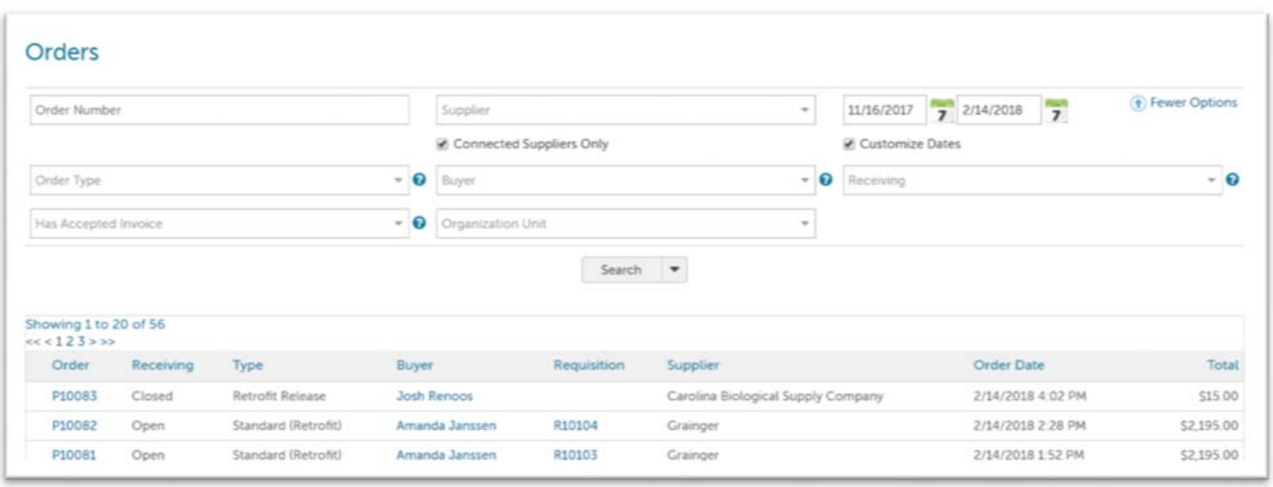
3. When you copy the requisition, all information including the notes and attachments will be copied into a new Incomplete Requisition for you to edit and resubmit.
4. When you Copy, you will be taken directly to the Incomplete Requisition. Make any needed edits to the copied requisition and click Checkout to create the new requisition and route it for approval.
5. The new requisition will have a new number but will have a link and reference to the old requisition for historical information.

Viewing Order

1. Orders that have been created can be viewed in the Orders area of the information section of the Dashboard or from the Order menu and View Orders page.

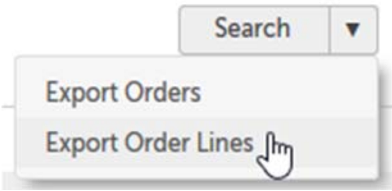


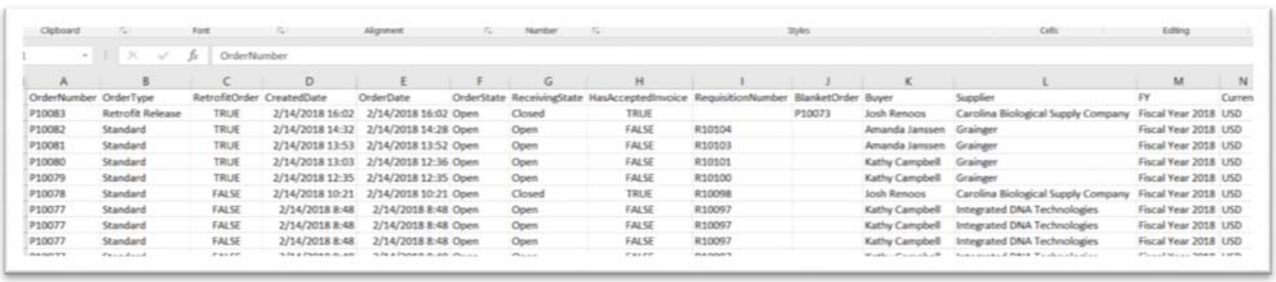
2. If the order is visible, click on the **order** from the list.
3. If the order is not visible, click **View all orders** to see all of your orders.
    a. The View Orders screen will appear.
    b. The top portion of the screen will allow you to search for an order. Select from one or more of the following search options and the click the **Search button**.
        i. **Order Number**
        ii. **Supplier**
        iii. **Created Date**
        iv. **Order Type**
        v. **Buyer**
        vi. **Receiving Status**
        vii. **If the Order has been invoiced or not**
        viii. **Organization Unit**
    c. To select an order, click on the **Order number** from the list.



Exporting Order Reports

1. From the View Orders page, you can use the down arrow on the search button to Export the current search results into an excel spread sheet with the header level report or an export of the line item detail.

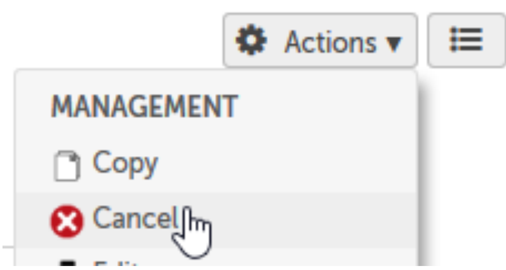




OrderNumber	OrderType	RetrofitOrder	CreatedDate	OrderDate	OrderState	ReceivingState	HasAcceptedInvoice	RequisitionNumber	BlanketOrder	Buyer	Supplier	FY	Curren
P10083	Retrofit Release	TRUE	2/14/2018 16:02	2/14/2018 16:02	Open	Closed	TRUE		P10073	Josh Renoos	Carolina Biological Supply Company	Fiscal Year 2018	USD
P10082	Standard	TRUE	2/14/2018 14:32	2/14/2018 14:28	Open	Open	FALSE	R10104		Amanda Janssen	Grainger	Fiscal Year 2018	USD
P10081	Standard	TRUE	2/14/2018 13:53	2/14/2018 13:52	Open	Open	FALSE	R10103		Amanda Janssen	Grainger	Fiscal Year 2018	USD
P10080	Standard	TRUE	2/14/2018 13:03	2/14/2018 12:36	Open	Open	FALSE	R10101		Kathy Campbell	Grainger	Fiscal Year 2018	USD
P10079	Standard	TRUE	2/14/2018 12:35	2/14/2018 12:35	Open	Open	FALSE	R10100		Kathy Campbell	Grainger	Fiscal Year 2018	USD
P10078	Standard	FALSE	2/14/2018 10:21	2/14/2018 10:21	Open	Closed	TRUE	R10098		Josh Renoos	Carolina Biological Supply Company	Fiscal Year 2018	USD
P10077	Standard	FALSE	2/14/2018 8:48	2/14/2018 8:48	Open	Open	FALSE	R10097		Kathy Campbell	Integrated DNA Technologies	Fiscal Year 2018	USD
P10077	Standard	FALSE	2/14/2018 8:48	2/14/2018 8:48	Open	Open	FALSE	R10097		Kathy Campbell	Integrated DNA Technologies	Fiscal Year 2018	USD
P10077	Standard	FALSE	2/14/2018 8:48	2/14/2018 8:48	Open	Open	FALSE	R10097		Kathy Campbell	Integrated DNA Technologies	Fiscal Year 2018	USD

Canceling an Order

An order can only be canceled if the order has not been invoiced or marked as having any receiving history. Some suppliers with Order Integration ( ) can disabled the ability to have a canceled order since they are processing the orders as quickly as possible. If an order needs to be canceled, contacting the supplier to cancel the order or return the order once received. This would be the supplier's preferred process if they have disabled the ability to cancel an order in OneSource.



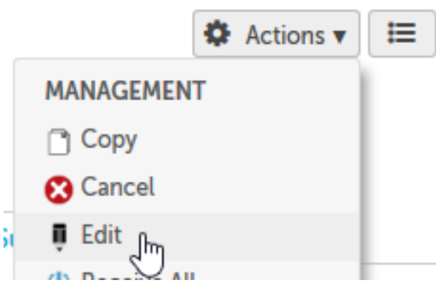
To cancel an order that has not been received against or invoiced:

1. Locate and view the order from the View Orders screen
2. Select Cancel from the Action options in the top right
3. Confirm that you want to cancel the order

The supplier will be notified via email that the order has been cancelled and you as the buyer will be CC'd for any added discussion through a reply all email. The order will also be canceled in the accounting system and the encumbered funds released.

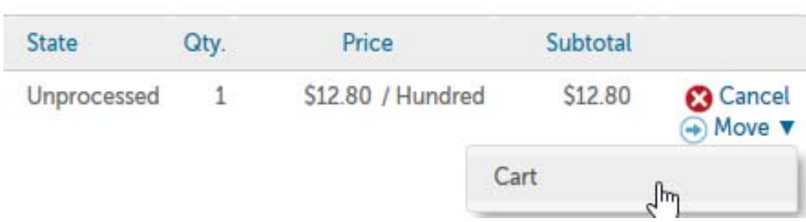
Changing an Order

An order can only be changed if the order has not been invoiced or marked as having any receiving history. Some suppliers with Order Integration ( ) can disabled the ability to have change orders done since they are processing the orders as quickly as they can. If an order needs to be changed, contacting the supplier to cancel the order or creating a new order and returning the initial order once received. This would be the supplier's preferred process if they have disabled the ability to change an order in OneSource.



To change an existing order that has not been received against or invoiced:

1. Locate and view the order from the View Orders page and select Edit in the Action items at the top right of the page
2. A new incomplete requisition will be created with the original order details and will be placed into the checkout
3. The original order details will be copied and can be modified as required from within the checkout screen. This includes Quantity, Account Codes (accounting classification categories), billing and shipping addresses as well as other related information like notes and attachments.
4. Non-Catalog items can also be changed if you Move the items back to the shopping cart you can edit a non-catalog item details



5. You can add items from your shopping cart to this change (incomplete Requisition) by using the Move feature as well.
6. Once you have the desired changes made, click Checkout

The modified order will be routed for approval again IF the account codes changed or the total value of the order is higher than the original. If the modifications to the order do not change the account codes or increase the value, the changed order will be created with a new order number referencing the original order as a Change Of Order ...

Once approved, a new order will be generated and sent to the supplier with a reference to the changed order. The Change Of Order link will provide an audit trail for the previous order. The original order will be canceled with a notification to the supplier and cancelation in the accounting system to release the funds.

Invoice Exception Process and Approvals

When an invoice does not match for the Receiving indicated by the buyer compared to the quantity being invoiced and 1) the subtotal tolerance is above 3% or $100 or 2) the Unit Price is above the 3% tolerance, the invoice will be sent through an approval process in OneSource.

You will be able to tell the invoices in the exception handling approval process as the State of the invoice will either be Pending Delegated Approval or Pending Order Acceptance. The approval routing of the invoice will follow the below workflow.

Invoice Approver Tasks and Responsibilities

Buyer: The Buyer is reviewing the reason why the invoice did not match on the quantity or the cost to accept or reject it. Accepting the invoice approval will send it to the departmental approval to approve the additional funding needed to pay the invoice. Rejecting the invoice will put the invoice into a Rejected state and send a notice to the supplier to inform them that the invoice was rejected and will not be paid.

Department Approver – Review the accepted invoice from the Buyer and approve the additional budget needed to pay the difference from what was encumbered on the PO.

Accounts Payable – To review the Buyer and Department Approver acceptance and confirm any needed steps before approving the mismatched invoice which then can be sent to our accounting system for payment.

Invoice Approval Notifications

When an invoice is sent to you for approval you will receive an approval notification email and see a task badge at the top right of Unimarket and a task for the invoice approval with the summary of the invoice number, supplier, amount and buyer. See below for examples of both.

Invoice Approval email notification:

Approval Required

WMU School of Medicine

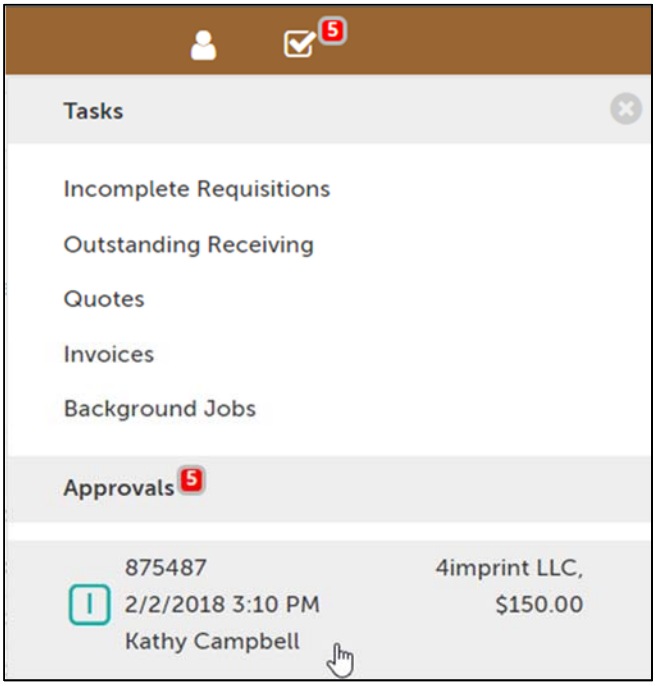
Invoice 54654864321

The following highlighted invoices require your approval.

Line Number	Description	Buyer	State	Unit Price	Subtotal
1	Widgets	adminUM	Pending Delegated Approval	$25.00	$150.00

Total: $150.00
Please login to approve or decline this invoice.

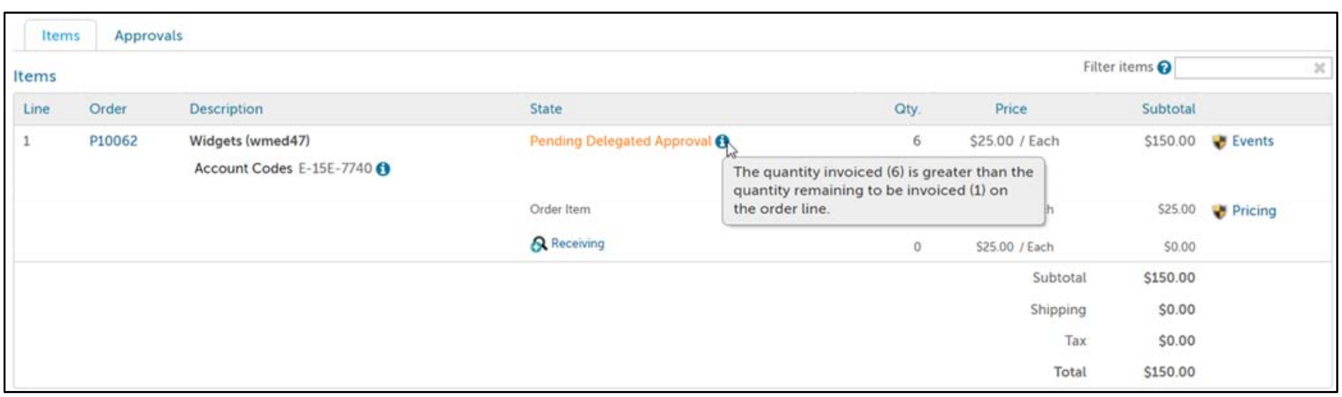
Invoice Approval Task Badge:



Approving an Invoice

When you are tasked with approving an invoice you will want to know a few pieces of information about the invoice like:

- Why it did not match the PO?
  Look next to the invoice State for the ℹ that will tell you why it did not match.



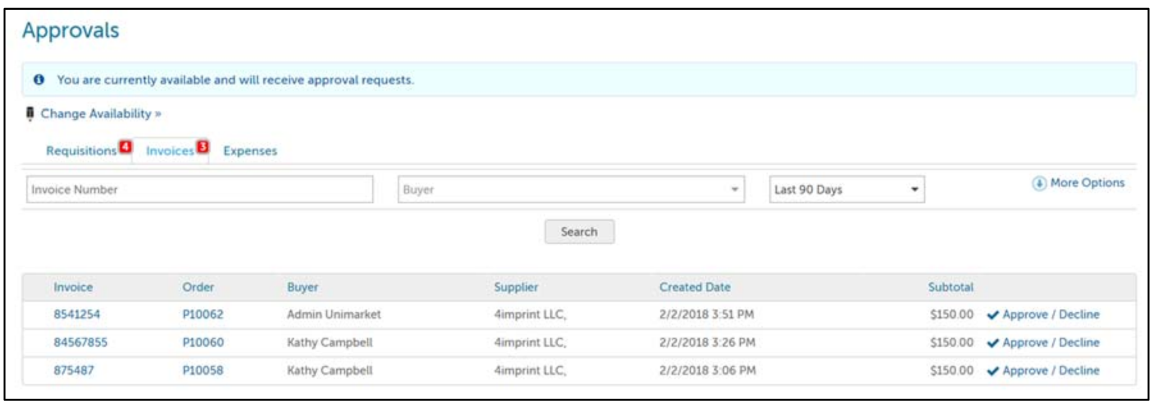
- Who has approved it already and did they leave a note?

When looking at the invoice, next to the Items tab there is an Approvals tab where the approval history resides.

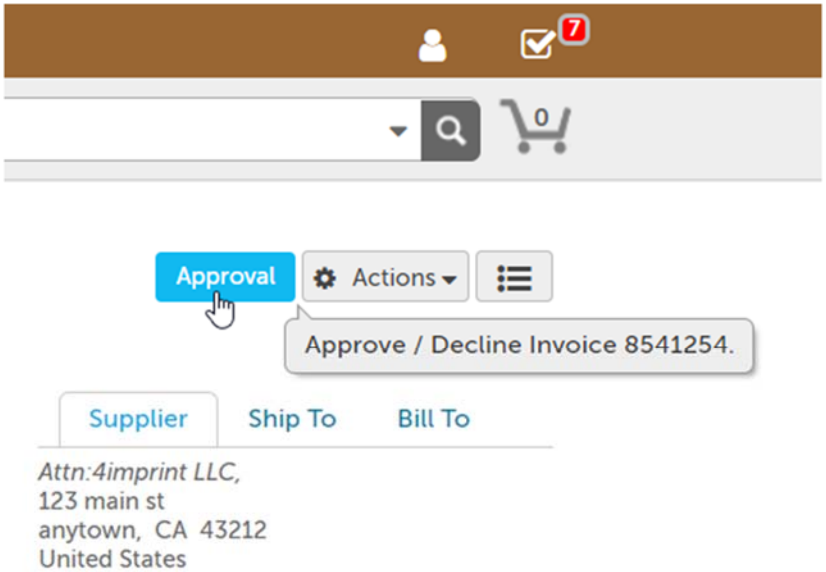
- How do I approve the invoice and enter a note?

There are two methods for approving an invoice

1. Approve from the Approvals page that lists all your approvals in separate tabs for Requisitions and Invoices. Click the ✔ Approve / Decline button to open the approvals popup.



2. Open the Invoice and click the Approvals button at the top right of the View Invoice page next to the Actions menu.



Both options will open the Approve/Decline popup page where you can click Approve or Decline and enter a note. If you Decline, you will be required to add a note.