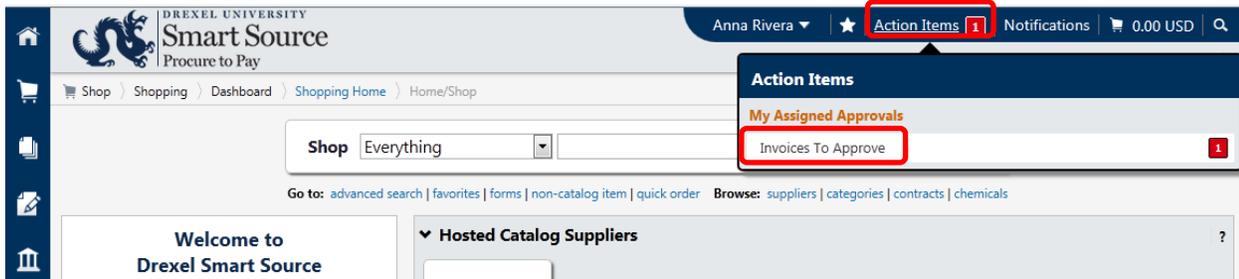


Smart Source Step-by-Step Guide

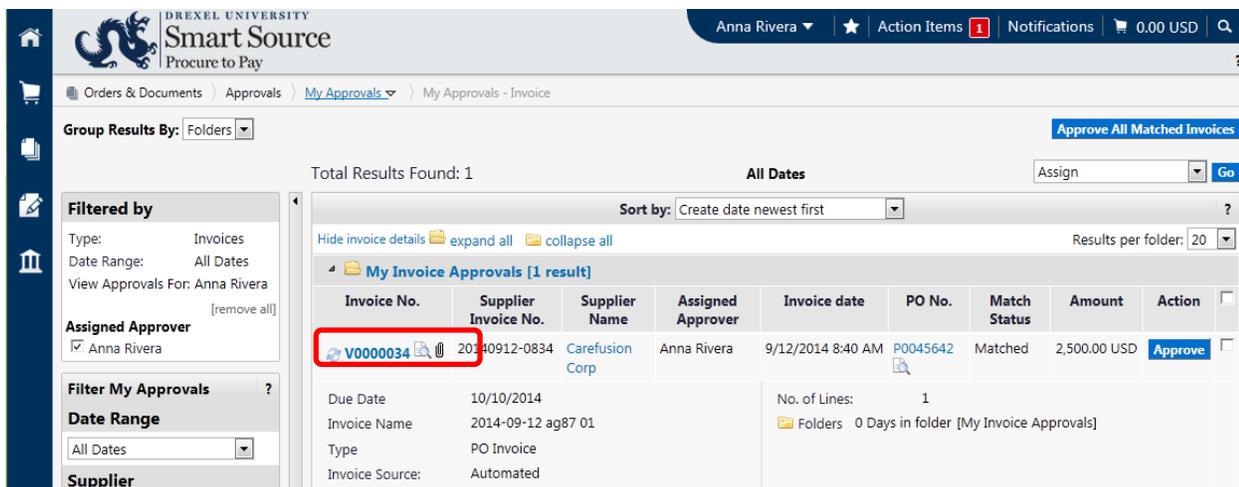
Approving an Invoice

Procedure

1. From the **Smart Source** home page, select the **Action Items** link at the top of the UI. You will see, among potentially other things, that you have an invoice to approve. Select the **Invoices to Approve** link.



2. A new window appears, displaying a list of invoices awaiting your review/approval. Select the invoice number link for the document you wish to review.



- The invoice is displayed. Select the **Approvals** tab to see the workflow for the invoice. Your name is displayed as the active approver for the invoice.

The screenshot shows the Smart Source interface for invoice V0000034. The 'Approvals' tab is selected and highlighted with a red box. The workflow diagram shows the following steps:

- Submitted:** Anna Rivera, 9/12/2014 8:40 AM
- Active:** Anna Rivera (view approvers)
- Future:** OK to Pay
- Future:** Auto-Close-PO

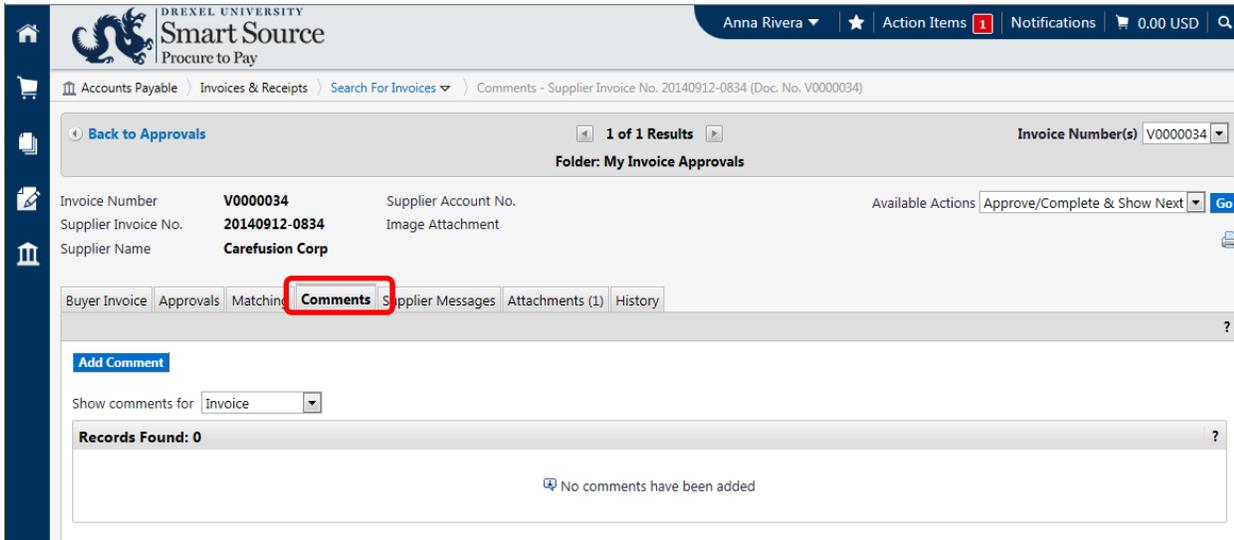
The interface also shows a sidebar with navigation options like 'Buyer Invoice', 'Approvals', 'Matching', 'Comments', 'Supplier Messages', 'Attachments (1)', and 'History'. The 'Approvals' tab is currently active.

- Select the **Buyer Invoice** tab to view the invoice information. Review the document for accuracy, pricing, etc.

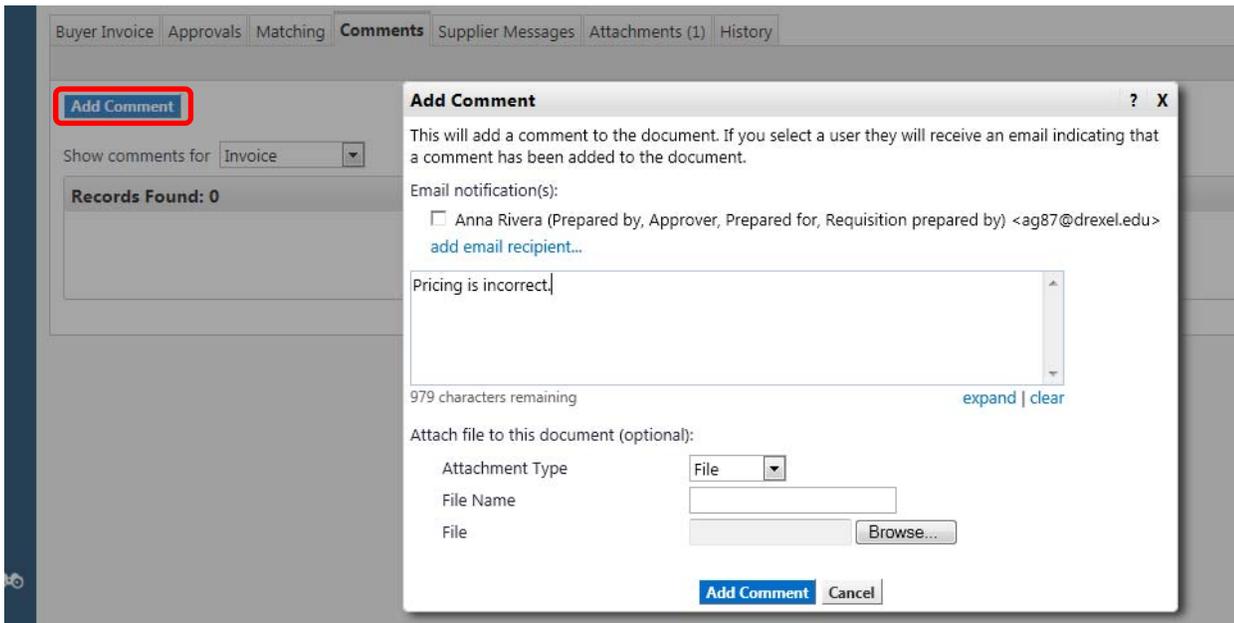
The screenshot shows the 'Buyer Invoice' tab selected and highlighted with a red box. The 'Summary' section is expanded, showing the following information:

General		Addresses	Note/Attachments
Invoice Type	Invoice	Remit To 88253 Expedite Way Chicago, IL 60695	External Note <i>no note</i> Internal Note <i>no note</i>
Pay Status	In Process	United States Address Id AP Accounts Payable 1	External Attachments Internal Attachments
Invoice Number	V0000034	Bill To Accounts Payable 3141 Chestnut Street Philadelphia, PA 19104 United States	
Supplier Invoice No.	20140912-0834		
Supplier Name	Carefusion Corp more info...		
Supplier No.	60227324		
Accounting Date	9/12/2014		
Invoice Date	9/1/2014		
Discount Date	<i>no value</i>		
Due Date	10/10/2014 <small>Is overridden</small>		
Terms	0, Net 30		
Terms Discount	0.00 USD		
Invoice Name	2014-09-12 ag87 01		
1099 Indicator	<i>no value</i>		
		Payment Information	Discount, Tax, Shipping & Handling
		Bank Code <i>no value</i>	Discount, tax, shipping & handling Allocation Weighted

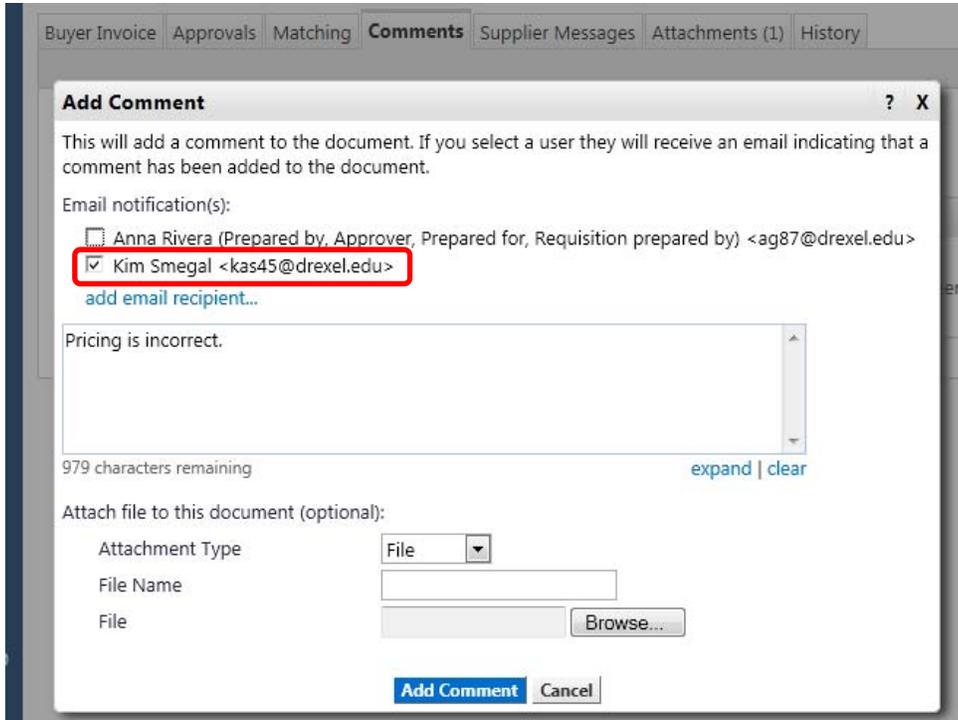
- If there is an issue with pricing or other matter that requires the attention of the Accounts Payable team, select the **Comments** tab. If no issues are identified, skip to the approval step.



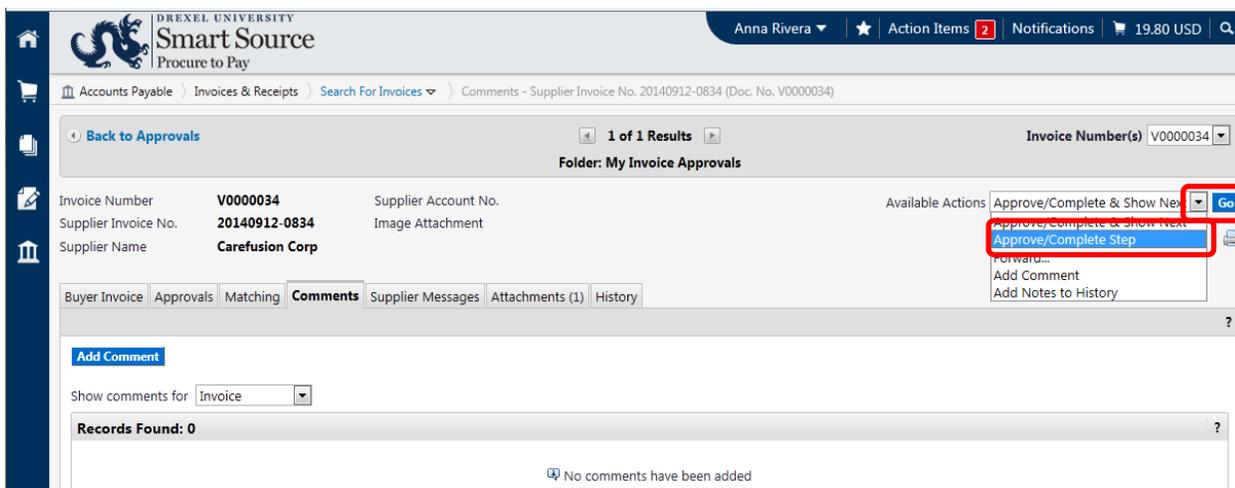
- Select the **Add Comment** link. A new window is displayed that allows you to capture comments.



- Alert AP to the issue by emailing a representative from the department by selecting the **Add Email Recipient** link. *Note, Smart Source only allows for emails to be sent to specific system users and not group email addresses.*



- Select the **Add Comment** link.
- To approve an invoice with no identified issues, select the Approve/Complete Step option from the **Available Actions** drop down menu and select the **Go** button.



You have successfully approved an invoice.