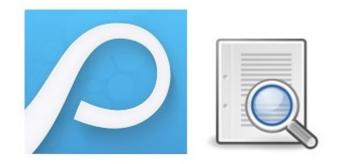
Mini manual for *invoice reviewers* on processing invoices in Proceedo

The Invoice reviewer is the one who made the order

and receives the invoice when it arrive to SLU



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Find the invoices

Click on any of the menu items Invoices:



For more information on finding the invoices, see the guide: http://guider.nu/slu/1037.guide

Information about the invoice

Click on the invoice row in order to see more information about the invoice.

	To handle 1 All invoice	es (1715) To handle by Q	Handled by Q			
	Invoice Number 🗸	Supplier 🝸 🗸	Invoice date 🗸 🛛 Ir	nfo Invoice status	s 🍸 🛛 Amount 🗸	Actions
5	20000114173	UNIT4 AGRESSO AB	2019-08-07	Review not per	formed (G 7 000,00 SEK	🥔 💬 🗐

Details on how to view information on invoices are found in the guide:

<u>http://guider.nu/slu/1038.guide</u>. There you can also see where to go to show / hide columns so that you only see the information you are interested in.

Accept the invoice

1. Start by viewing the invoice (click the image to open it in a separate window) and see that everything is in line with what is agreed with the supplier regarding price and delivery.

Visma Proceedo Browse	All requisitions	Invoices				Greger Gr Sveriges lantbru	
Search for invoice	Q	Advanced search	Export to	Excel	» < 1/2 >	$\Theta \oplus \mathcal{O}$	2
To handle 1 All invoices 1	715 To handle by	Q Handled by Q		† ‡†	Srediktura UNIT & AGREED	Faitura 1	Page 1 of 2
Supplier 🍸 🗸	Invoice date 🗸	Invoice status 🝸	Amount ~	Actions	terrenter Bill verster Die der Bertreter	Pathowy 1 2000/07 1	10-10 Lawrendollow Br 10 3517-07-07 35
V UNIT4 AGRESSO AB	2019-08-07	Review not performed (Greg	7 000,00 SEK		BELEVE Dave BE Lancastantina Beneratura data ngen Beleventa Beleventa	Pathwardness Enclose Lands and December (Pathward and States) Test (Pathward 2010)	
(i) 4999 9841000 LEV.FAKTUROF Redovisning o	9600 Fr Gemensam ad	itt 🛃 Köpet avser	5 600,00 SEK	Accept invoice	No-others And Dataset No estimate Anti-constitution Anti-constitution	ti ndrana til sor	

- 2. Open attachments and read comments if available (click on the paper clip to open attachments and click on the speech bubble to see the comments).
- 3. Verify the accounting (cost center, project and free field). If the accounting need to be changed you:
 - a. make the change directly in the accounting fields (you can only choose projects that has a connection to the cost center) or
 - b. write the accounting as a comment to the invoice for your financial administrator to handle (see below on how to write a comment).
- 4. Specify what the purchase concerns (in intended field or as a comment).
- 5. Accept the invoice by clicking the button Accept invoice.

То	handle 1 All invoices	715 To	handle by Q	Handled by Q			
	Invoice Number ~ S	upplier T	Ir	ivoice date 🗸 🛛 Info	Invoice status 🝸	Amount ~	2 Actions
~	20000114173 U	NIT 3	DAB 2	019-08-07	Review not performed	7 000,00 SEK	🥔 💬 🗐
(i)	4999 LEV.FAKTUROR PREL	0 sning och res	9600 Gemensam		Köpet avser (vertext) 4	5 600,00 SEK	Accept invoice
	7						S Open Invoice 5
	Cost center		Project	Free field		at the concerns	

For more information on how to accept an invoice, see guide: http://guider.nu/slu/1040.guide

Write a comment

If the invoice already have a comment you can click on the speech bubble to get to the comments. Otherwise, you go to *Actions / Show log & Comments*.

Invoice Number 🗸	Supplier 🍸 🗸	Invoice date 🗸	Info	Invoice status 🍸	Actions
20000114173	UNIT4 AGRESSO AB	2019-08-07		Review not performed (0	Greg (D)
					Not my invoice Choose another reviewer Show log & Comments Open invoice details

Then follow these steps:

- 1. Write the comment in the field.
- 2. <u>Click on the plus</u> to post the text.
- 3. Click next to the comment box in order to close it.

UNIT4 AGRESSO AB	2019-08-07	Review not perform	ned (Greg	
3	199 This invoice is yours, i Show 🔽 Comments (t <u>came to me</u> by <u>mistake</u> , /Greger	1 +	2
	Event: Invoice register	ed		

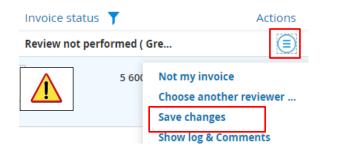
Example on how it can look like when one specifies accounting and what the purchase regards as a comment, instead of writing/changing it in the intended fields.



For more information on how to write a comment, see guide: <u>http://guider.nu/slu/1043.guide</u>.

Add and delete attachments

NOTE! If you have changed the accounting or posted comments on the invoice in the list view before you open the invoice details to attach or remove the attachment, these changes will be lost unless you save the changes before via Actions / Save changes (only visible if there is some changes to save).



Add an attachment

1. Open invoice details.

Invoice Number ~	Supplie	er 🝸 🗸	Invoice date 🗸	Info	Invoice status 🍸	Actions
20000114173	UNIT4 A	AGRESSO AB	2019-08-07		Review not performed (Gre	
4999 BALTZAR PREL BOK	9841000 Redovisning och res	9600 Gemensam adminis	Fritt 🛃	Köpet avser (vertext)	5 600,00 SEK	Accept invoice
					1	> Open invoice details

- 2. Go to the Attachments tab.
- 3. Click on the plus sign in order to find the document you want to attach.
- 4. Write a comment. Don't forget to click on the plus in order to post the text!

nvoices	UNIT4 AGRESS (20000114173)			Invoice status: Re Reviewer: Granskar	
Invoice Header Acc	ounting History			Accept invoice	Save change
*Konto ()	Kst	Projekt	Fritt	Köpet avser (vertext) Total Amou
4999 BALTZAR PREL BOKFÖRING	9841000 Redovisning och reskont	9600 Gemensam administrat	ion	₽	, (SE 5 600,00
1470 INGÅENDE MOMS	2				1 400,00
	Attachments (1) Ext	ended log			То рау
€ 坐				ion of registration +	Accounted sum
NIT4 AGRESSO Customer onference onfirmation.pdf reger Granskare 019-08-07 14:01		attachment to preview	to the con Show Comm	ents (0) 🖌 Log (1)	Difference

From within this page, you can also change the accounting, specify what the purchase concerns and accept the invoice.

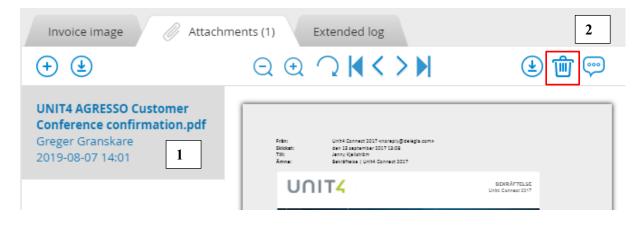
If you do not want to approve the invoice from within the detail page but return to the list view, click the "Save changes" button (otherwise the comment will not be saved).

	L.		er Granskare ntbruksuniversitet	\bigcirc
Invoice status: Review Reviewer: Granskare, G	reger	rmed		
Accept invoice	Save c	nanges	More actions	~

Delete an attachment

- 1. Select the attachment by clicking on the link to the attachment.
- 2. Click on the "bin".

You can only delete the attachments you have attached, when you have the invoice in your personal invoice list.



For more information on how to add or delete an attachment, see guide: <u>http://guider.nu/slu/1044.guide</u>.

Forward the invoice to another person - Choose another reviewer

This feature should be used when you want to send the invoice to another person without pressing the "Accept invoice" button.

- 1. Write a comment on why you are sending the invoice. Go to Actions / Show log & Comments (see above for more information on writing comments).
- 2. Go to Actions / Choose another reviewer.

Invoice status 🍸		Actions
Review not performed (Greger Gr	anskare) 🥒 🥥 💭
		Not my invoice
	2	Choose another reviewer
	1	Show log & Comments

- 3. Write the name of the person in the field. If you want to forward to your financial administrator you write the group name "department's 3 digits + ADM", for example "123 ADM" to send to the financial administrator at department 123.
- 4. Click on the magnifying glass to search
- 5. Select the person you want to forward to (even if there is only one person in the search result)

Choose reviewer 3 Anita	×
Available (7)	
Name	Email
Fröman, Sanita	sanita@slu.se
Gunnarsson, Anita	anitag@slu.se
Hägg, Anita	tsanitah@slu.se
Norman, Anita	anino@slu.se
Olofsson, Anita 5	anitao@slu.se
Orozovic, Kanita	kaic0002@slu.se
Tillberg, Anita	aati0001@slu.se
	6 Send to reviewer Cancel

6. **Press "Send to reviewer**".

For more information on how to choose another reviewer, see guide <u>http://guider.nu/slu/1046.guide</u>.

More information about reviewer's handling of invoices

In **Manual for reviewing invoices in Proceedo** (<u>http://guider.nu/slu/1035.guide</u>) you find more information on how you as an invoice reviewer handle invoices in Proceedo.

For example:

- Save changes
- Handling in case of inaccuracies
- Delegate the right to review invoices