

# 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*

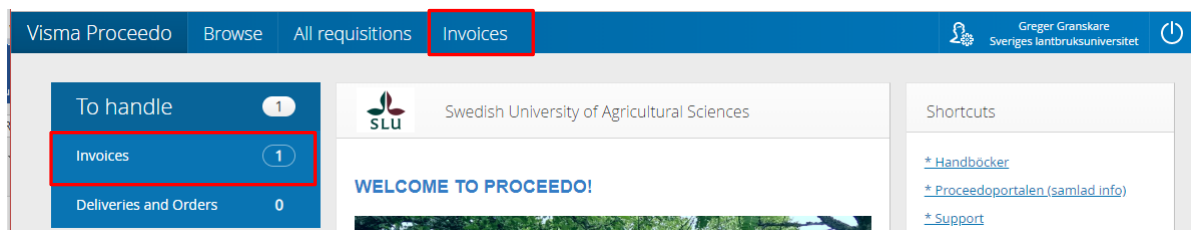


## Content

Find the invoices.....	1
Information about the invoice.....	1
Accept the invoice.....	2
Write a comment.....	3
Add and delete attachments.....	4
Add an attachment.....	4
Delete an attachment.....	5
Forward the invoice to another person – Choose another reviewer.....	6
More information about reviewer’s handling of invoices.....	7

## Find the invoices

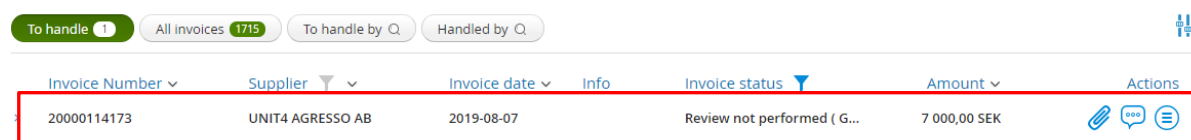
Click on any of the menu items Invoices:



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.

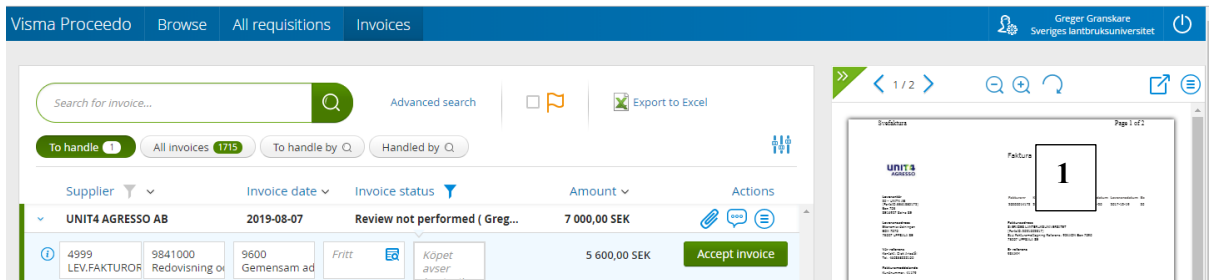


Details on how to view information on invoices are found in the guide:

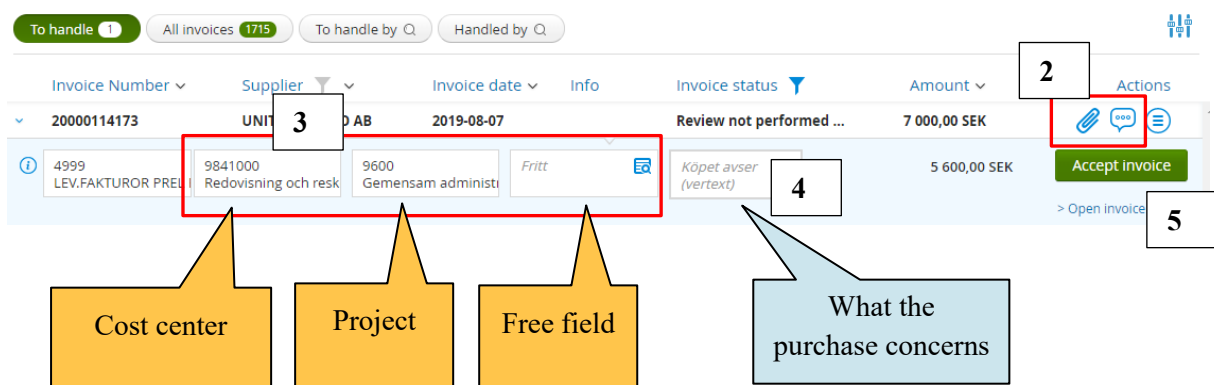
<http://guider.nu/slu/1038.guide>. There you can also see where to go to show / hide columns so that you only see the information you are interested in.

## 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.



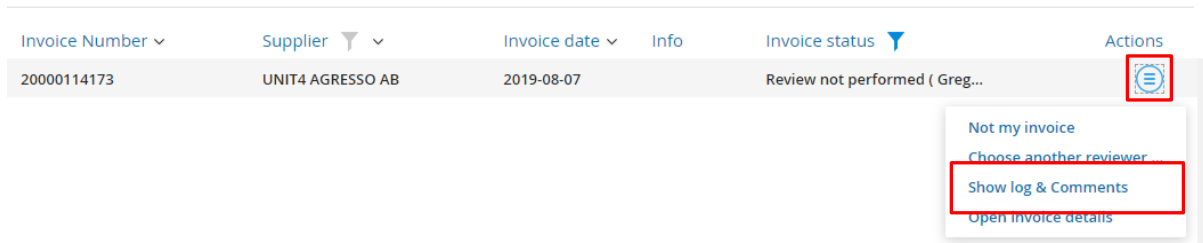
2. Open attachments and read comments if available (click on the paper clip to open attachments and click on the speech bubble to see the comments).
3. Verify the accounting (cost center, project and free field). If the accounting need to be changed you:
  - a. make the change directly in the accounting 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.



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

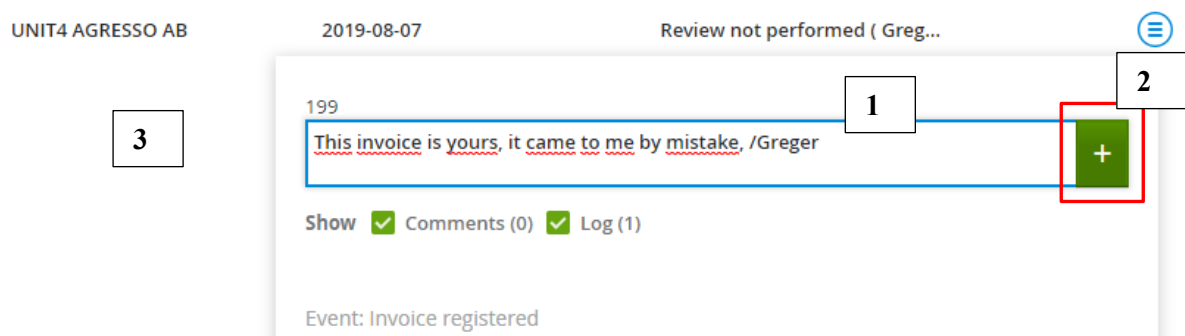
## Write a comment

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*.

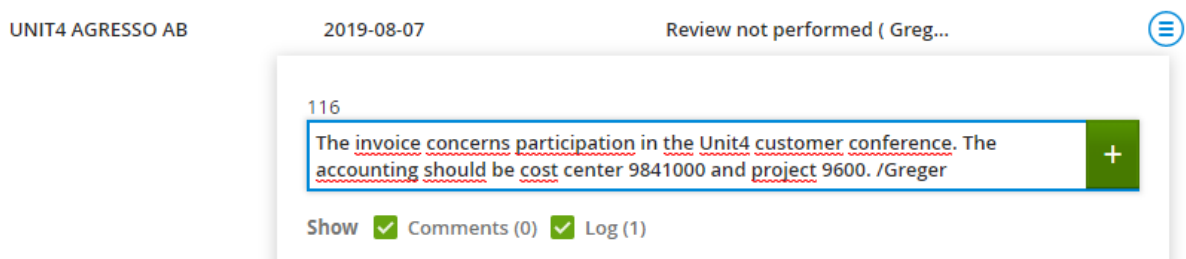


**Then follow these steps:**

1. Write the comment in the field.
2. **Click on the plus** to post the text.
3. Click next to the comment box in order to close it.



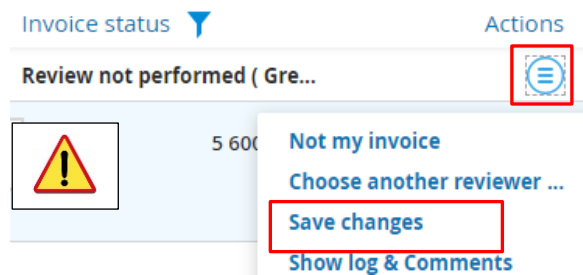
*Example on how it can look like when one specifies accounting and what the purchase regards as a comment, instead of writing/changing it in the intended fields.*



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

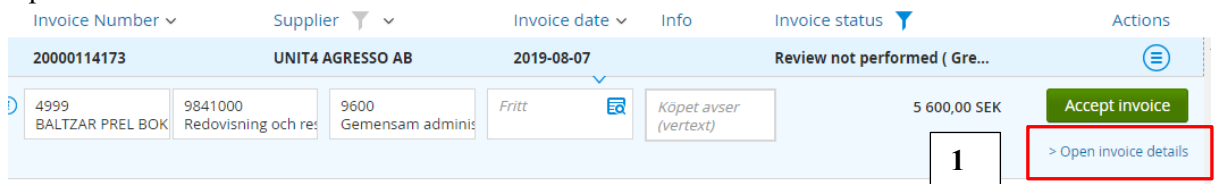
## Add and delete attachments

*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).*

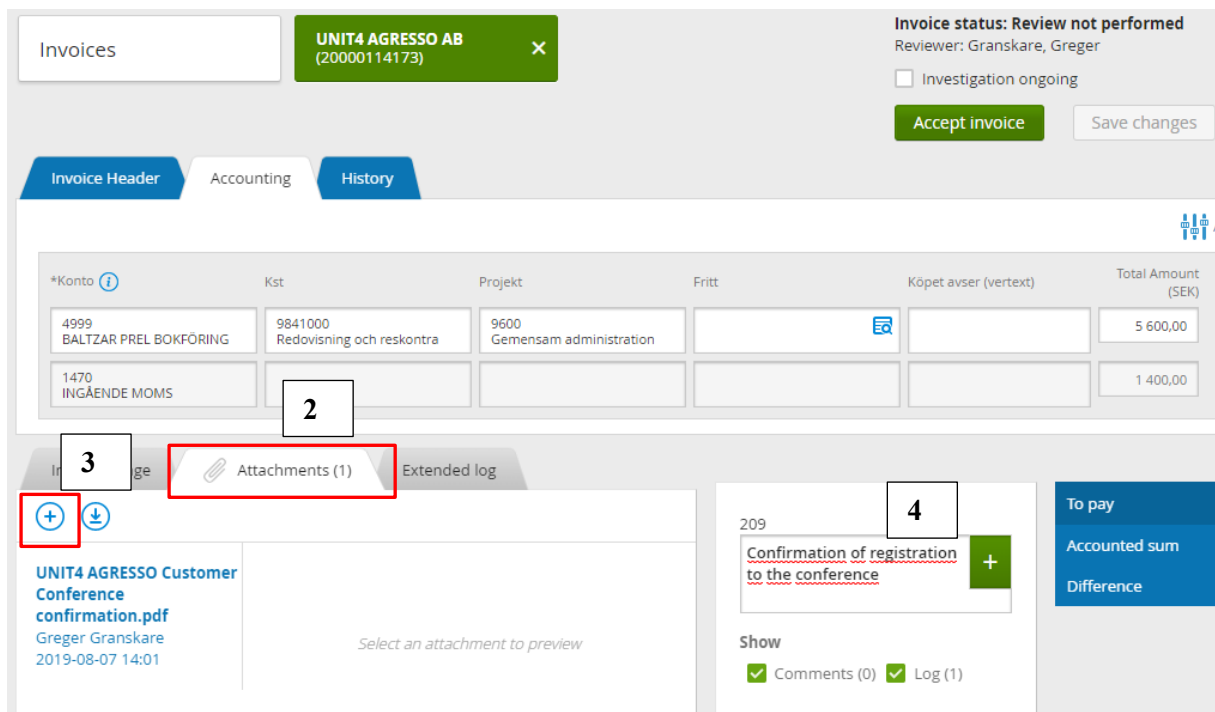


## Add an attachment

1. Open invoice details.

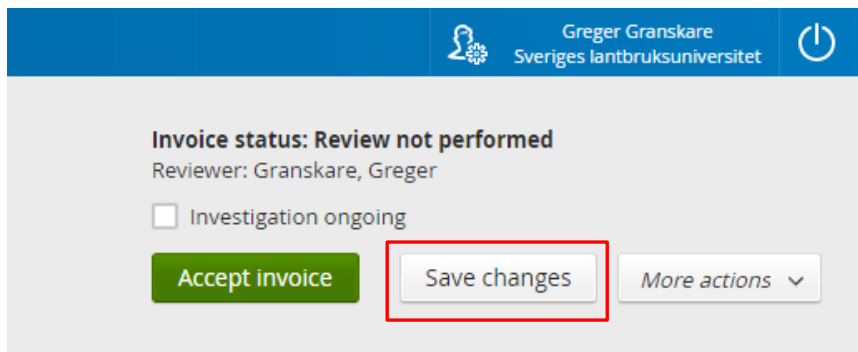


2. Go to the Attachments tab.
3. Click on the plus sign in order to find the document you want to attach.
4. Write a comment. Don't forget to click on the plus in order to post the text!



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

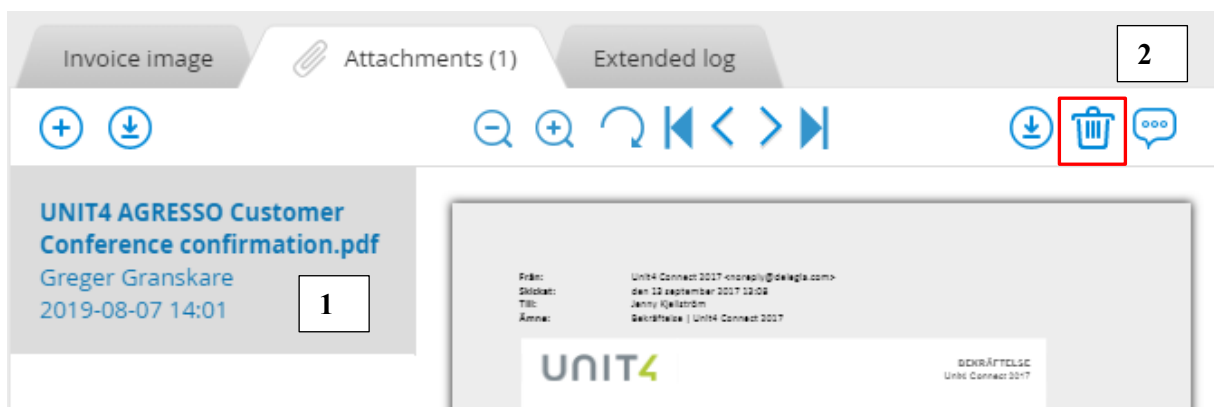
If you do not want to approve the invoice from within the detail page but return to the list view, click the "Save changes" button (otherwise the comment will not be saved).



### 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: <http://guider.nu/slu/1044.guide>.

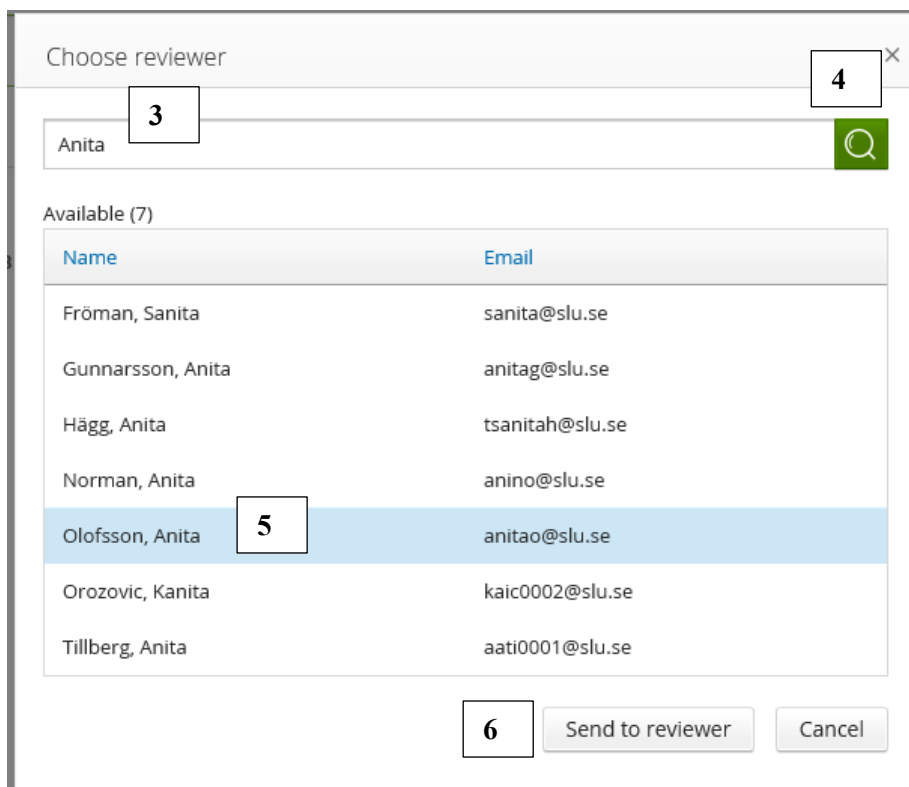
## Forward the invoice to another person – Choose another reviewer

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.**



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)
6. **Press ”Send to reviewer”**.



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

## More information about reviewer's handling of invoices

In **Manual for reviewing invoices in Proceedo** (<http://guider.nu/slu/1035.guide>) 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