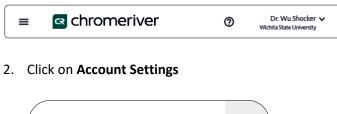
# Quick Reference

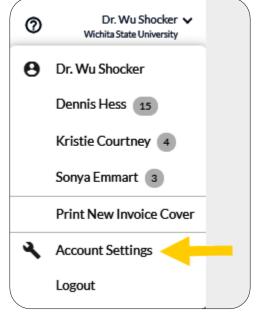
## Uploading Invoice Images via Email

## Verify email address

Before emailing an invoice or image, verify that the email address you are using is associated to your Chrome River account.

1. Click your name in the upper right corner of the navigation bar.





3. Select the **Personal Settings** menu item and verify the **Primary Email** address.

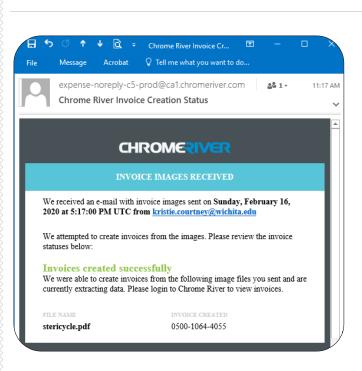
$\equiv$ chromeriver			0	Dr. Wu Shocker 🗸 Wichita State University
Dr. Wu Shocker chromeriver01	Account Information	n		
Personal Settings	Password	Change Password		
Preferences Settings	Email Addresses			
Delegate Settings Notification Settings	Primary Email	WuShocker@chromer	iverwallet.c	com
Privacy Policy	+ Add Alternative Emails			
About Chrome River				/

### Email invoice PDF

 Start a new email to <u>wichita.edu-</u> <u>vision@invoice.ca1.chromeriver.com</u> and attach the PDF invoice copy. Make sure to delete any images contained in the email signature.

ち ( File		əb∈ ∓ <sub>Labora</sub> विट — □ > ısert   Options   Format <sup>-</sup>   Review   Acrobat   ♀ Tell n
ت= Send	То	wichita.edu-vision@invoice.ca1.chromeriver.com;
	Subject Attached	Laboratory Supplies stericycle.pdf 257 KB
< I		

5. You will receive an email from Chrome River confirming the invoice images have been received.



6. A new invoice line will be created and displayed in the **Draft Invoices** section



- 7. Click on the invoice to display it on the right side of the screen.
- 8. Click the **Images** button to display the attached images on the left side of the screen.



9. Click the **Edit** button on the right side of the screen.

Images	PDF 🔻	Delete	Edit	Submit 👻	•••
X10628	841-Steric	ycle Inc			,

10. Review and verify the information populated during the OCR process. If any information is incorrect, click on the field and edit the information.

		Cancel	Save	Submit 🔻
(10628841-Stericy) x 10628841	cle Inc			
endor Name	X10628841-S	Stericycle Inc		
Yendor Address X10628841-Stericycle Inc PO Box 6575 Carol				
	X10628841-St PO Box 6575 Carol Stream, USA ID: X10628841BU10	IL 60197-657	'5	
endor Invoice Number	4009077312			
voice Date	12/31/2019	Ċ	1	
voice Amount		17.00	USD -	]
voice ID	0500-1064-405	56		
ontract Number				

- <u>Vendor Name</u>: Fully searchable by the vendor number, or any part of the vendor name. When extracting data from a PDF, this field should automatically populate.
- <u>Vendor Address</u>: Auto populates if there is only one address listed, otherwise fully searchable.
   When extracting data from a PDF, this field should automatically populate.
- <u>Vendor Invoice Number</u>: List as it appears on the vendor invoice, up to 36 characters. When extracting data from a PDF, this field should automatically populate if a vendor invoice number is available.
- <u>Invoice Date:</u> Date listed on the Vendor's Invoice. When extracting data from a PDF, this field should automatically populate.
- <u>Invoice Amount:</u> Total amount to be paid. When extracting data from a PDF, this field should automatically populate.
- Invoice ID: System Generated.
- <u>Contract Number</u>: State or WSU issued number if applicable.

#### Invoice Detail

- Enter Payment Message (optional 70 characters) with identifying information for the invoice such as:
  - Invoice numbers (overflow from Vendor Invoice Number field)

Page | 2

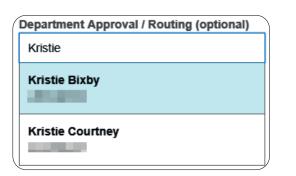
- Account Number
- Customer Number
- Order Number
- Brief description (Maintenance Subscription 10/23/19-10/22/20)

Payment Message

Cust# 2069525

12. Enter a **Department Approval / Routing** name when additional staff are required to review the invoice. When extracting data from a PDF, this field may automatically populate. This value can be updated or removed.

Department Approval / Routing (optional)



13. Enter a detailed Business Purpose.

Business Purpose

Tub for disposal of laboratory waste.

- A business purpose is defined as one that supports or advances the goals, objectives and mission of the university; and adequately describes the expense as a necessary, reasonable and appropriate business expense for the university.
- The field appears small but has a high character limit (>220)

14. Activity and/or Location: If your department utilizes these fields, select the proper value, otherwise leave blank.



- <u>Activity</u>: Click the drop-down box and select the appropriate value from the list.
- <u>Location</u>: Click the drop-down box and select the appropriate value from the list.
- 15. The **Department Tracking Number** field is an optional field a department can utilize.

Department Tracking Number

#### Special Handling

 Payment Handling: The default value is "No". This indicates that payment will be made to the vendor via the payment method listed in the Vendor Name field.

Payment H	ndling	
No	•	

17. Only change when special circumstances are needed. Example: If a payment needs to be handdelivered to a vendor (instead of being mailed or sent via ACH) the value "Yes, Pickup by" or "Yes, Send to" shall be selected.

Payment Handl	ing	
No	-	
No		
Yes Yes, Pickup by Yes, Send to		

18. Search for and select the appropriate name in the field provided.

Payment Handling	
Yes, Pickup by 🔹	
Emmart	
Sonya Emmart	,

19. **Handling Options** are used by the Accounts Payable department to assist with back office processing

Hand	Handling Options (AP use only)				
	Suspended				
	WIRE - International (include \$25 fee)				
	WIRE - Domestic				
	Interfund				

20. Additional Information field can be used to communicate additional information to the Accounts Payable Department.

Additional Information

Must hand-deliver the check to the speaker on 2/4/2020.

#### Comments

- 21. When an invoice PDF has been emailed to Chrome River, the system will automatically add a comment to the invoice.
  - Enter any additional comments about the invoice. Comments <u>cannot</u> be deleted or modified once posted.



#### Attachments

22. When an invoice PDF has been emailed to Chrome River, the system will automatically display the items either in the **OCR** or **Attachments** section.

<ul> <li>Attachments (3)</li> </ul>			
	Drag image here to upload	Browse File	
OCR			
Attachments			
Add Expense			
23. Click on the +	Add Expense buttor	۱.	
		(USD) REMAINI	



24. Select an expense tile.

Select an item type						
(	Q. Search					
	۳1 <u></u>	I				
	FOOD / OFFICIAL HOSPITALITY	ALL OTHER ACCOUNT CODES				

25. Enter/verify the total amount of the invoice allocated to this funding/account code selection.

+ Add Expense Allocate Amounts	Clear Amounts	TOTAL (USD) REMAINING (USD) 17.00 0.00
All Other Account Codes		Cancel Save
Funding	_	Amount 17.00 🖬 USD
Search for Funding		

26. **Funding:** Search for and select the appropriate funding.

+ Add Expense	Allocate Amounts	Clear Amounts	TOTAL (USD)	REMAINING (USD)
🔢 All Othe	er Account Codes		Cancel	Save
Funding			17.00	Amount USD
Search for F	unding			

27. **--Select--** Tap anywhere in this field to search for and select the appropriate account code. Save the expense line.

Funding			
	D10252-101510-01620 D10252: RU Controller's Office 101510: Financial Operations		
	- Select -		
		J	

	Page
All Other Account Codes	Cancel Save
	Amount
	17.00 🖬 USD
Funding D10252-101510-01620 D10252: RU Controller's O	ffice 101510: Financial Operations
3690-Other-Professional Scientific Supplie	
bmit	
<ol><li>Submit the invoice for apprendict of the second se</li></ol>	
green <b>Submit</b> button in th	ne upper right corner.
Images PDF  Delete	Edit Submit 🔻 🚥
X40000044 Otoriousla Inc	
X10628841-Stericycle Inc	
9. Click <b>Approve</b>	
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31. If an **Additional Reviewer** is selected the system requires you to add a comment.

Approval Confirmation			
I hereby approve this invoice for processing.			
Kristie Courtney			
Comments are required when an Additional Review is selected	1.		
Cancel	Approve		

32. Click the green **Approve** button to submit the invoice.

Approval Confirmation				
I hereby approve this invoice for pr	rocessing.			
Select Additional Reviewer				
Optional Comment				
<b>x</b>	Cancel Approve			

33. The following message will be displayed.

