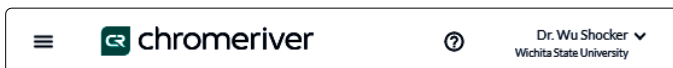


Uploading Invoice Images via Email

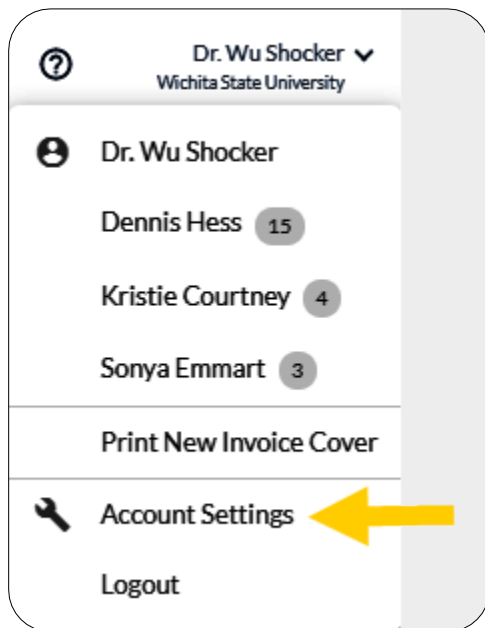
Verify email address

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

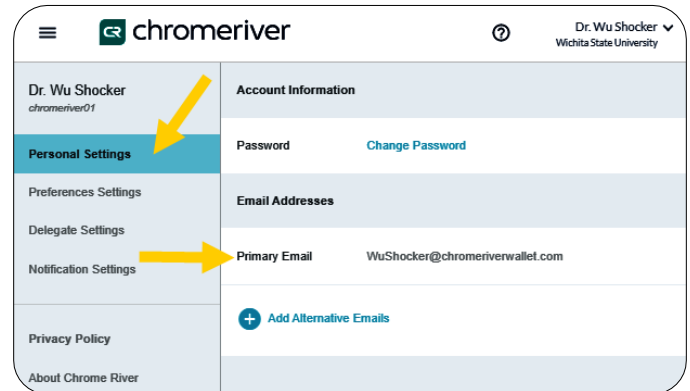
1. Click your name in the upper right corner of the navigation bar.



2. Click on **Account Settings**

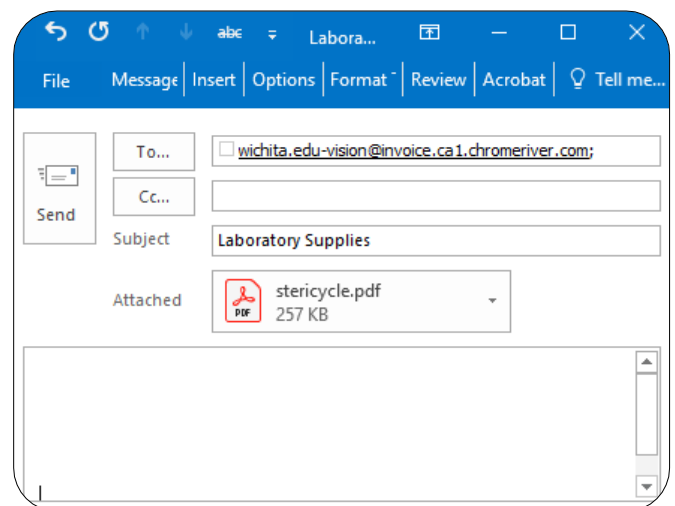


3. Select the **Personal Settings** menu item and verify the **Primary Email** address.

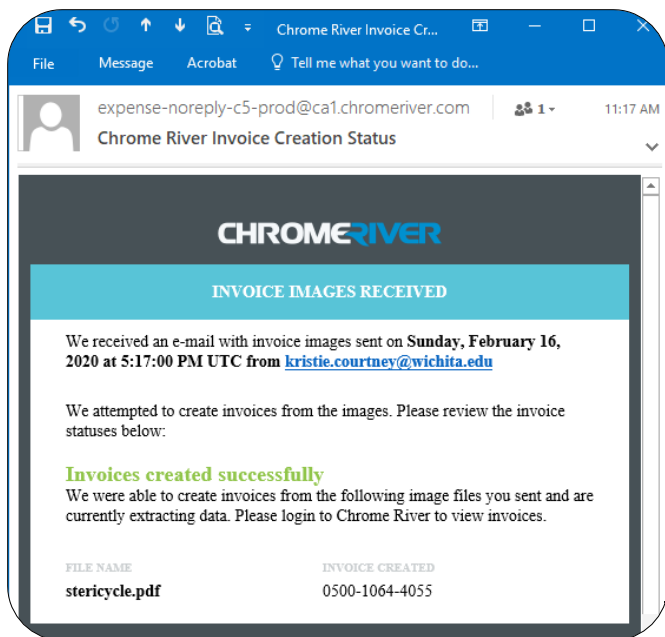


Email invoice PDF

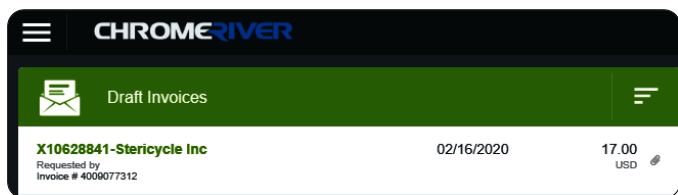
4. Start a new email to wichita.edu-vision@invoice.ca1.chromeriver.com and attach the PDF invoice copy. Make sure to delete any images contained in the email signature.



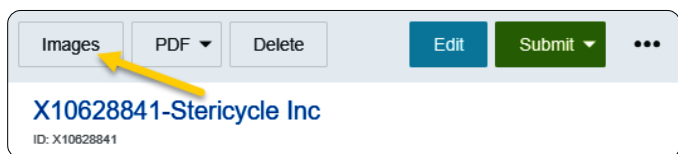
5. You will receive an email from Chrome River confirming the invoice images have been received.



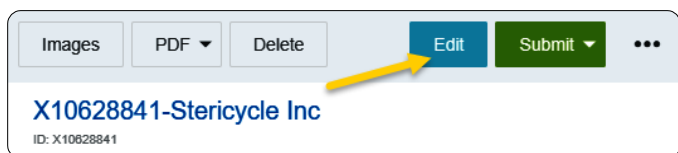
6. A new invoice line will be created and displayed in the **Draft Invoices** section



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.



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

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

Invoice Detail

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

- 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)

Department Approval / Routing (optional)

Kristie

Kristie Bixby

Kristie Courtney

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.

Activity

-- Select --

Location

-- Select --

- **Activity**: Click the drop-down box and select the appropriate value from the list.
- **Location**: 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

16. **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 Handling

No

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

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

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

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.

- a. Enter any additional comments about the invoice. Comments **cannot** be deleted or modified once posted.

Comments (1)

Kristie Courtney 02/16/2020 11:27 AM
 Email address of sender: kristie.courtney@wichita.edu.
 Email received timestamp: 02/16/2020 17:27 UTC

Add Comment a Post

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.

Attachments (3)

Drag image here to upload Browse File

OCR

Attachments

Add Expense

23. Click on the **+ Add Expense** button.

+ Add Expense More ▼

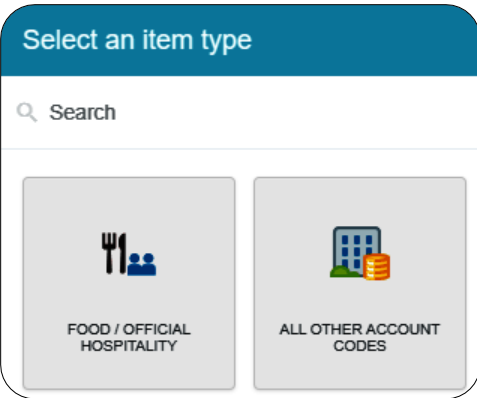
▶ **LINE NUMBER** ↑

TOTAL (USD) REMAINING (USD)

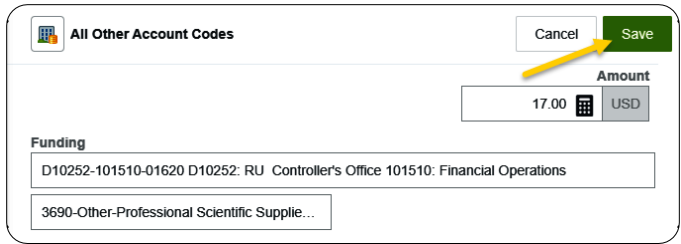
0.00 **17.00**

AMOUNT(USD) ▲

24. Select an expense tile.

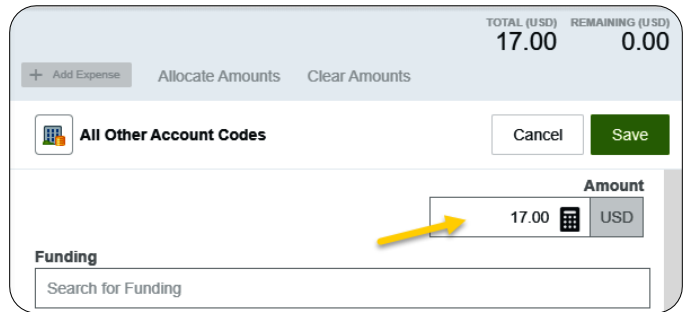
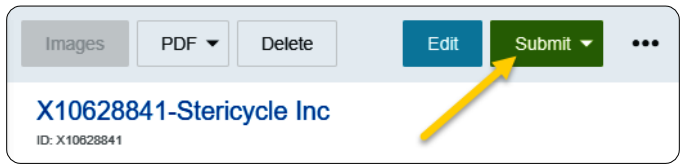


25. Enter/verify the total amount of the invoice allocated to this funding/account code selection.



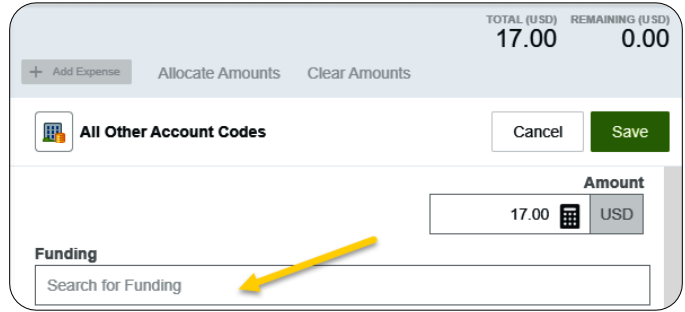
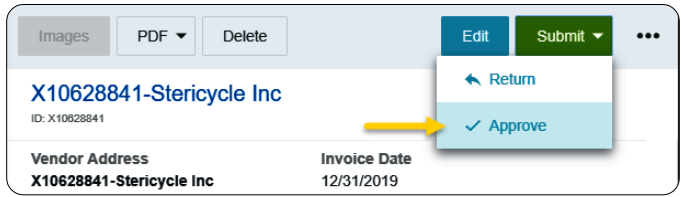
Submit

28. Submit the invoice for approval by clicking the green **Submit** button in the upper right corner.



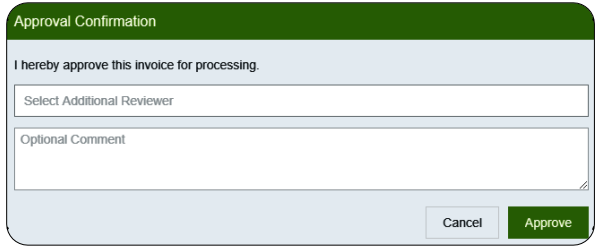
26. **Funding:** Search for and select the appropriate funding.

29. Click **Approve**

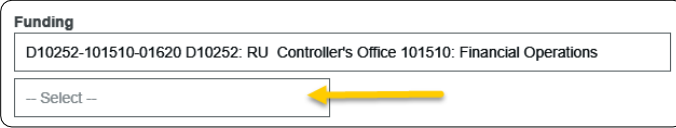


30. **Additional Reviewer:** If during approvals it is determined an additional reviewer is needed, click in the **Select Additional Reviewer** field to search for and select the appropriate individual. This field is optional and can be left blank.

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



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. ←

Cancel Approve

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

Approval Confirmation

I hereby approve this invoice for processing.

Select Additional Reviewer

Optional Comment

Cancel Approve

33. The following message will be displayed.

