INVOICE APPROVAL PROCESS FOR COMPUTER ACCESS - STEP BY STEP!

First Line: Email

Second Line: Password123!   (first time only- will require a change)

Third Line: Condo Live

Click on Display

This screen will display your invoices which require approval. Click on the green icon to view the image of the invoice.

If you want to approve all you can select all or you can do one at a time.

Click on "Next Steps" use drop down to select your option. If you select "dispute" or "reject payment" the note field will be required.

Last step: Push "post". This will move the invoice forward to the next approver, or back to Beven & Brock if you are the last approver.

Mobile Setup and Approvals

This section is intended for users planning on using PAYscan Mobile in order to review and approve invoices.

Steps:
1. Downloading the App
2. Initial Setup
3. Logging in
4. Navigation
5. Review and Approval

1. Downloading the App

Go to your Google Play Store or to the Apple App Store. Search for **'PAYscan Mobile',** find the app and then click install.

The download should not take more than a few minutes. Once installed, you will need to open the app on your device.
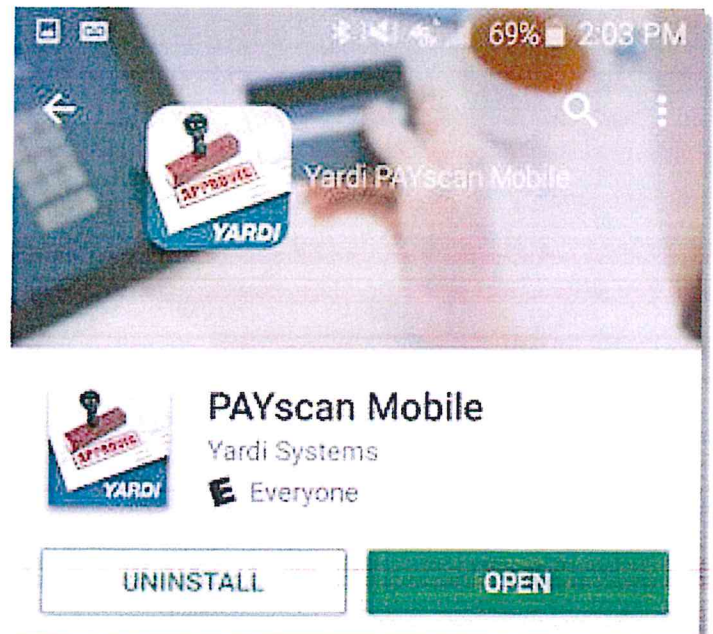
2. Initial Setup

With the App open you will be prompted with the home screen. Click on settings to bring up the following menu. Navigate to **'Settings'** and then locate the **'Import Using QR Code'** function. We will a QR code in order to import the necessary information. How to generate the QR code is found in the next section.

If you have been provided a QR code by someone already, simply click on **'Import Using QR Code'**, aim your camera at the QR code, and the camera will close the moment it is done scanning. Make sure to have the QR code contained in the rectangle in the middle of the screen.
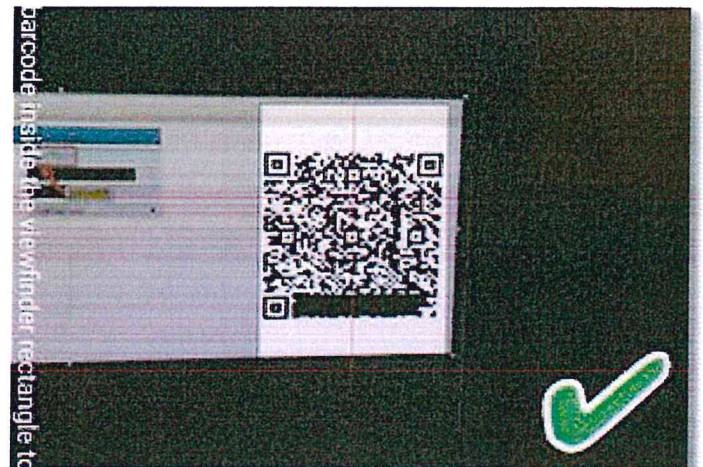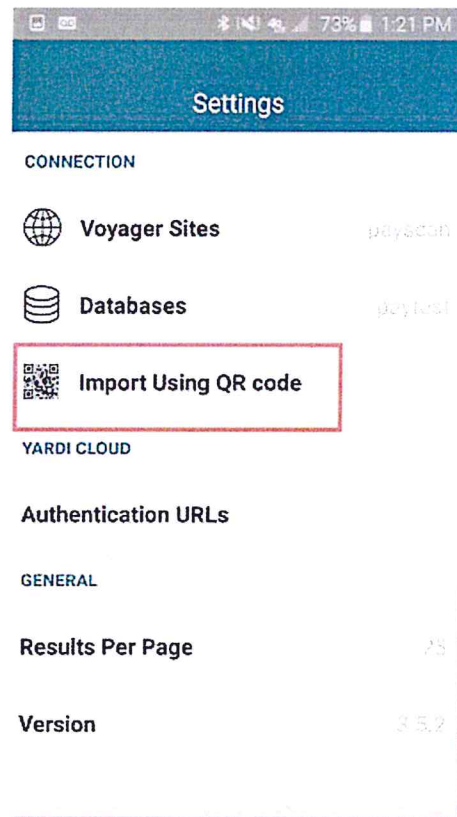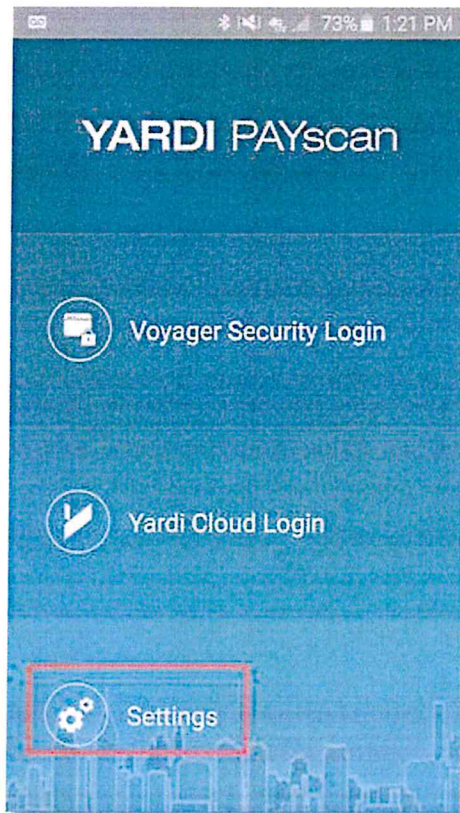
2b. Creating the QR code

In case you do not have a QR code, you can generate one in PAYscan Finance Manager>Admin> Mobile Connection Settings.

PAYscan Website Alias can simply be PAYscan (unless you work in multiple webshares, such as upgrade environments or you work with multiple organizations, in which case you should add unique identifiers in order to note which webshare you will be accessing). Database Alias should be the name of the DB you are currently in. Be aware you will have to do this for both LIVE and any TEST DB you currently operate in.

Click on Generated QR code and then your QR will be displayed. It can then be scanned, or copied and sent to all users. It may now be scanned in by anyone with the Mobile app.

3. Logging In

Now that the QR code has added your Voyager Web and Database information, you can now log in using your normal credentials.

Enter your Username/Password, choose the Database you would like to access, and then click '**Sign in**'.

It should be noted that you can save your login credentials using the '**Remember Me**' setting located below '**Sign in**'.
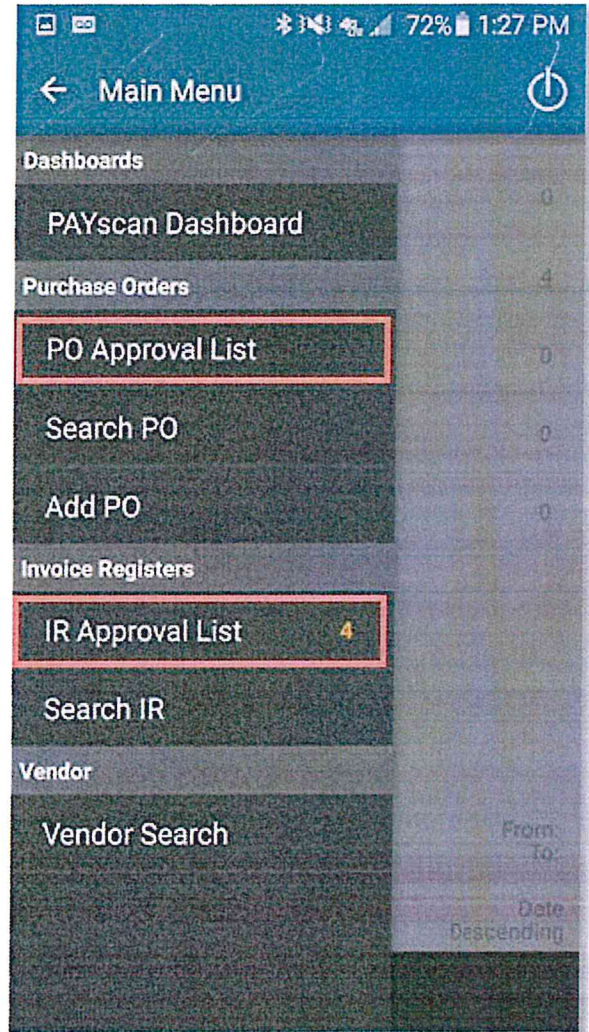
Condo Live QR Code

4. Navigation

Once logged in, the home screen will display the PAYscan Dashboard information. This will display the number of current PO's and Invoice Registers are each step of the AP process.

You can also swipe to the right or click on the menu icon in order to bring up the side menu.
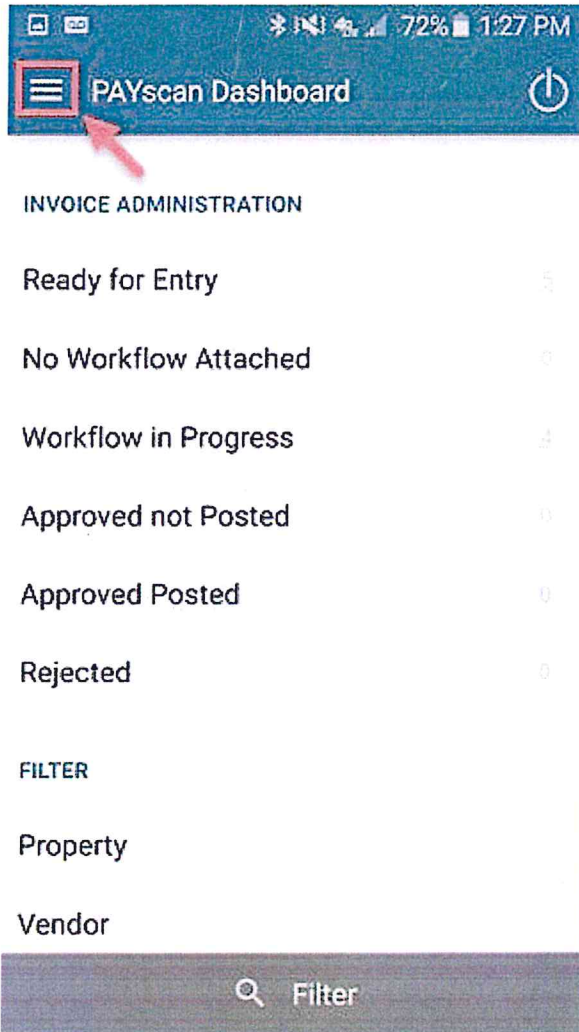
Most commonly used are the **PO Approval List** and **IR Approval list** sections. These will lead you to your approval windows. They will also display a number indicating the current number of items at your step for approval. Here we can see there are 4 Invoice Registers awaiting this user's review.

Click on the **'IR approval List'** to be taken to the approval screen.

6. Review and Approval

After Clicking on the IR Approval List, a screen will display showing you all the current IR's waiting for your approval. You can then click on a specific invoice in order to pull it up for review. In this example I have selected IR# 9 in the first image.   The second example screen is the header information on the invoice, along with the image link. Finally, the last screen is the bottom half of the invoice including Detail line information, workflow history, and attachments.
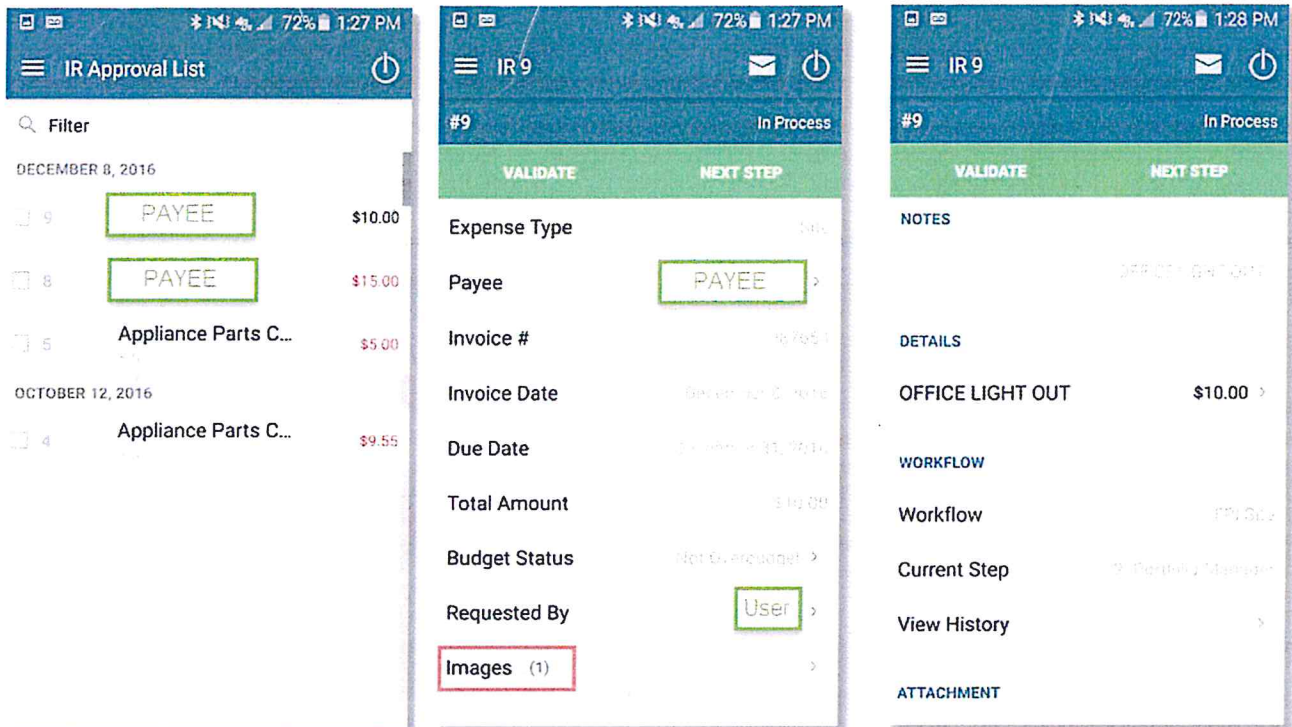
In order to approve and invoice you must click on the '**Next Step**' button at the top of the page. From here you can select the appropriate next step for the workflow based on your review of the invoice.

There is a notes field for sending messages to the next approver, as well as the workflow history summary.

When you are ready to move it forward, simply click save and you are done!

Go back to the Invoice Register Selection Screen to continue the process.