

### Create a Payment Request Using an Existing Vendor

To create a new invoice or request for payment:

Either:

- On the home page, on the Quick Task Bar, click the **New** task and then **New Payment Request**.
- or-
- On the menu, click **Invoice** → **Create New Request** (on the sub-menu)
  1. From the **Payment Request Type** drop down menu, select the appropriate request type (i.e. invoice or request for payment).
  2. Use the Search fields to find the relevant vendor and select it from the Vendor List.
 

**Tip:** There may be vendors with multiple mailing addresses, so make sure you also verify the address of the vendor you are selecting.
  3. Complete the required fields, indicated with red bars and the optional fields as needed.
  4. Click **Save**.
  5. The **Amount Remaining to be Itemized** pane will appear. Select the appropriate **Expense Type** and complete the required fields indicated with a red asterisk. To add other expense types, click **Add** and complete the required fields.
  6. Continue to itemize the request until the Amount Remaining to be itemized is \$0.00, and then click **Save**.
  7. After entering all the details click **Submit Request**.

### Add Distributions (Allocations) to Payment Request

To allocate expenses to projects or departments to be charged:

1. In the **Itemization Summary**, check the box for the line item you want to distribute.
2. From the **Distribute** drop down menu, select **Distribute Selected Items**. Allocate to the appropriate accounts by clicking **Add** and then selecting the relevant budget account(s).
3. Click **Save**.

### Attach an Image to a Payment Request

To upload and attach images to a payment request:

1. Open the desired payment request, click **Actions** → **Upload Image**. The Upload Image window appears.
2. Click **Browse**.
3. Navigate to the image file, then click **Open**.
4. Click **Upload** and then click **Close**.

You can check the image later by clicking the **View Invoice** button with the request open, or by clicking **Actions** → **View Image** in the **Payment Request List** page after selecting the request.

### Request a New Vendor

To request a new vendor or update/change a vendor address that currently does not exist in the system:

1. From the **Create New Payment Request** screen, click **Request New Vendor**.

2. Complete the General Vendor Information. Required fields are indicated with a red bar.
3. If you need to attach documents (e.g. Form W-9), click the **Actions** drop down menu and select **Upload Image** to attach vendor documents.
 


**Tip:** Images uploaded to a vendor request cannot be removed.

**Tip:** Do not upload any forms that include confidential information such as social security numbers. Forward those documents directly to Accounts Payable.
4. Click **OK**.

### Review and Approving a Payment Request

To approve a payment request:


1. Click **Approvals**, and then click the **Payment Requests** tab to view the list of requests awaiting approval.
2. Select the request you want to review.
3. Review the Invoice Details and the Itemization Summary, including any Distributions.
4. Click **View Invoice** to review any attached documents.
5. Once you have reviewed the request, click **Approve**.

**Note:** The  icon denotes the transactions/allocations that the cost object approvers are approving.

### Add an Additional Approver

If any additional approvals are needed that are not included in the workflow, you may send the payment request to another approver by adding the individual into the workflow.

To add another approver into the workflow (applicable to cost object approvers only):

1. On the desired payment request, click **Details → Approval Flow**
2. Click the  icon to add.
3. In the **User –Added Approver** field begin typing the name of the desired approver and select.

Tip: Once you begin typing a menu will appear that allows you to select the criteria you would like to search on (i.e. Last Name or First name).

4. Click **Save Workflow**.

For default invoice approvers or user-added approvers, to send the payment request to another approver:

1. Click the **Approve & Forward** button.
2. Enter the **User-Added Approver**.
3. Click **Approve & Forward** button to approve the payment request and send to the next approver.

### View Work Flow of a Payment Request

To view the details of the payment request approval flow:

1. Open the desired payment request.
2. Click **Details → Approval Flow**. The Approval Flow for Payment Request window appears.