



SpendBridge

END-USER GUIDE

The Procure-to-Pay Process

Version 1.3

June 7, 2019

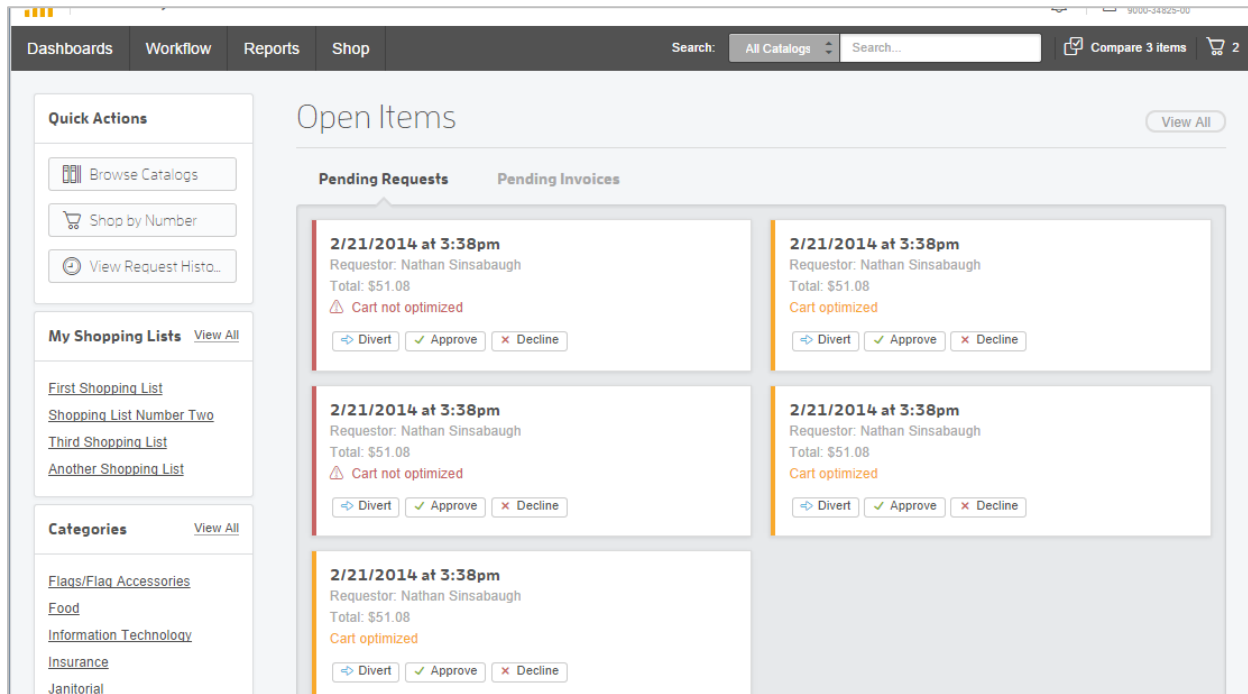
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1 E-Procurement

SpendBridge provides tools to support the entire procure-to-pay process. Depending on your organization's preferences, you may be implementing one or several SpendBridge features. The SpendBridge purchasing module is where the process begins. Our

Those requests are then routed through **Approval Workflow**. Finally, requests are automatically turned into **Purchase Orders** and sent to vendors upon final approval. (If the request does not require approval, SpendBridge will automatically generate a PO when you create a request and route it to the vendor).



purchasing tools allows users to generate **Requests** for goods or services from their vendors and route those requests to various approvers within their organization.

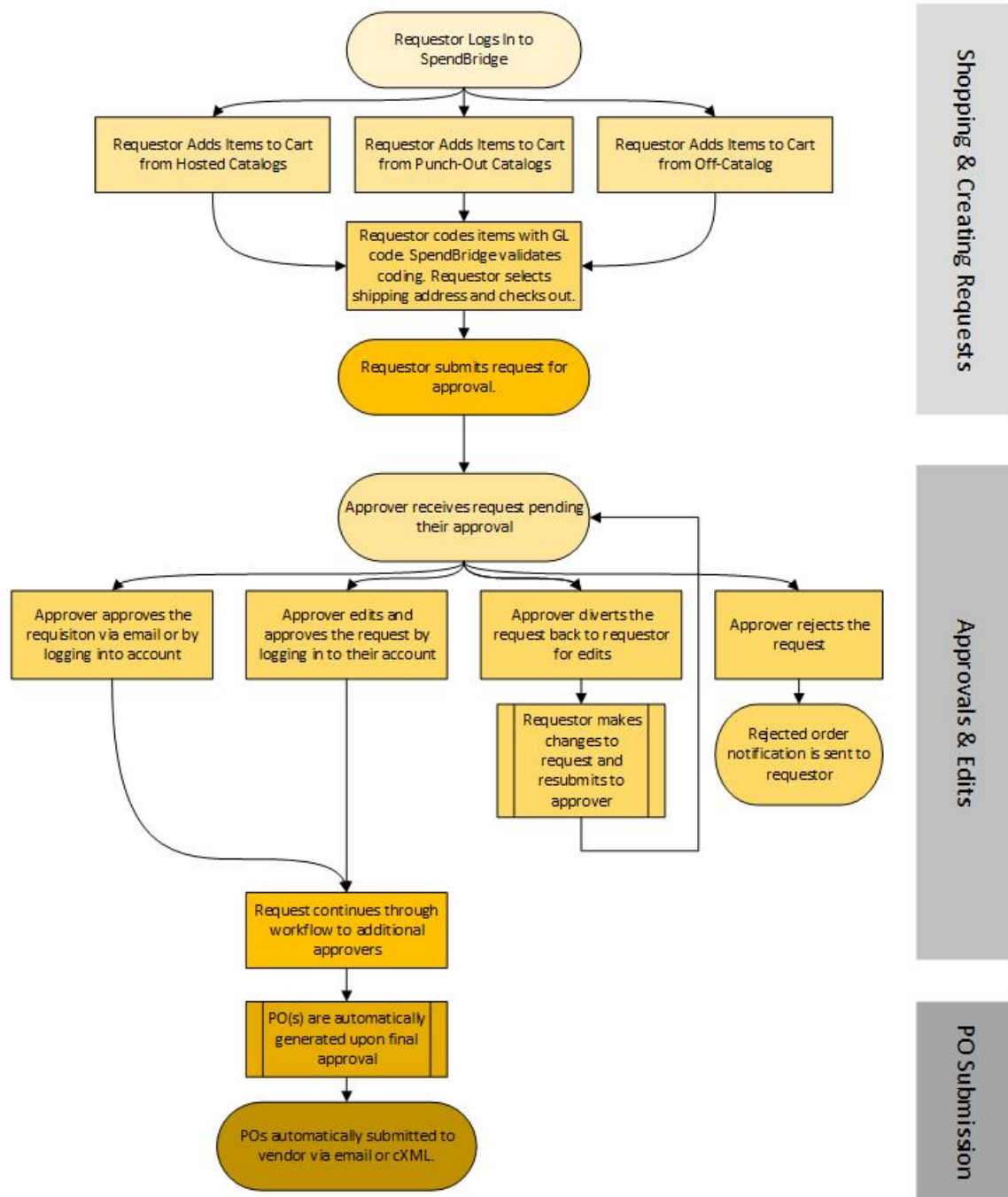
Users can create requests by shopping for items within SpendBridge and adding those items to their cart. Users can shop from:

- **Vendors' Hosted Catalogs**
- **Vendors' Punchout Catalogs**
- **Shop by Number**
- **Shop Off-Catalog**
- **Shopping Lists**



The E-Procurement Process

SpendBridge helps streamline your day-to-day procurement tasks, so that purchasing becomes easier and savings more obvious. Our process chart below describes the life cycle of a purchase in the SpendBridge system.



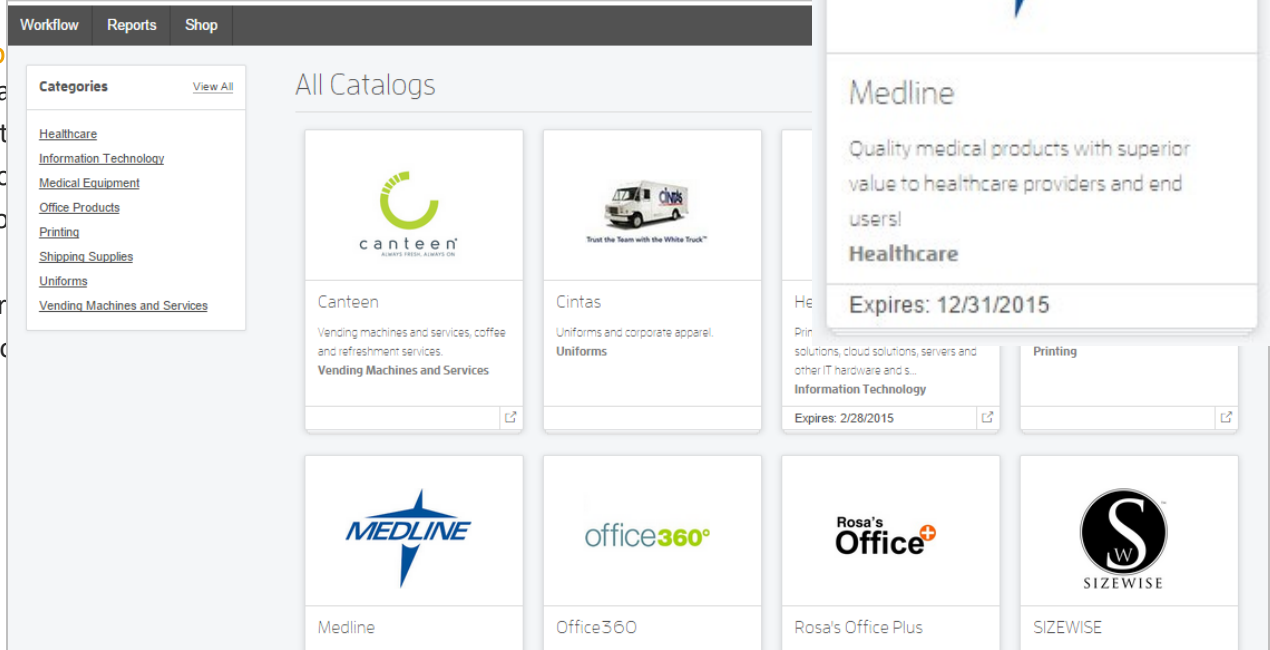
Types of Vendor Catalogs

SpendBridge supports two types of vendor catalogs: hosted and punch out. Each offers different advantages, and the types of catalogs your organization will implement will be up to you and your vendors. SpendBridge also supports catalog creation and management.

Hosted Catalogs

A hosted catalog is hosted on SpendBridge. It is managed by the vendor. Hosted catalogs are a set of items from a vendor, although they are managed by SpendBridge. Users can search for items and search at the top of the page.

details regarding the vendor agreement or the catalog



are found on the catalog cards.

2 Creating Requests

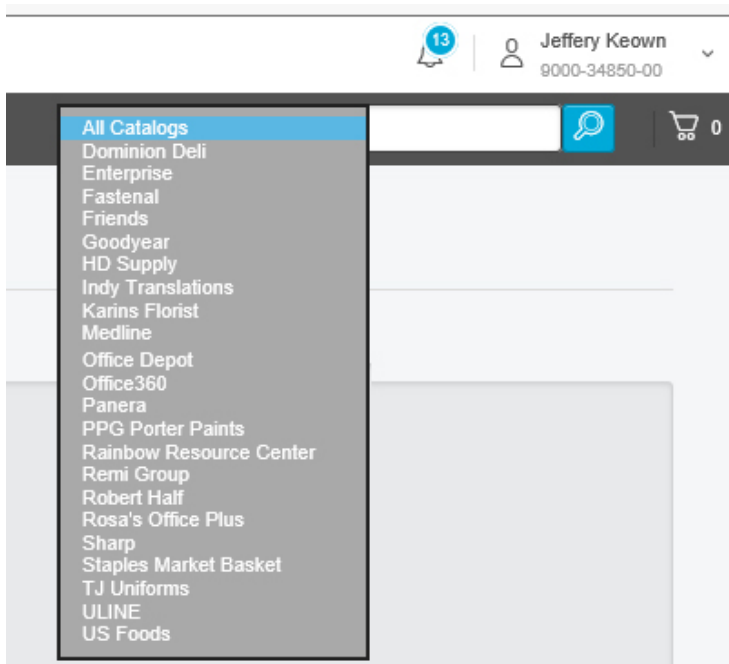
Users can create requests by adding items to their shopping cart from **Hosted Catalogs**, **Punchout Catalogs**, **Shop by Number**, **Shop Off-Catalog**, and **Shopping Lists**.

2.1 Shopping Catalogs

When you log in to SpendBridge, you'll land on your homepage, which we call the **User Dashboard**. To start browsing vendor catalogs, click "Browse Catalogs" button in the Quick Actions area of your user dashboard.

The catalog page contains catalogs from your vendors, organized on catalog cards and sorted into catalog categories. You can filter the catalogs using the categories to the left. Contract expiration dates and

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Punch-Out Catalogs

The screenshot shows the Staples Advantage website interface. At the top, there's a navigation bar with 'Customer Service' and 'Messages (0)'. Below that, the customer ID '70110831DET' is displayed. A search bar with a 'GO' button and a shopping cart icon showing '0 ITEMS' is present. The main content area features a 'My Orders' and 'My Ink & Toner' section. Below this, there's a 'Quick Order' section with a 'Quick Order Item #' field, a 'Qty.' field set to '1', and an 'Add to Cart' button. A 'Your Shopping Lists' dropdown menu is also visible. The main product listing is for '100% Pure Natural Bottled Spring Water, 8-oz. Size, 24 Bottles/Carton' with a price of '\$16.82 CT/24'. The 'Add to Cart' button is highlighted with a callout box. A yellow arrow points from the 'Add to Cart' button to a callout box.

Like hosted catalogs, punchout sites can contain products and pricing tailored to your organization.

Indicated by the arrow icon at the top right of the catalog card, a punch-out catalog links to the vendor's site. Once there, users shop for items within the vendor's site.

Users can bring those items back to their SpendBridge cart by adding the items to the cart on the vendor's site and "checking out" of the vendor's site. The items will be returned to the SpendBridge cart to complete checkout and route the request through approval workflow. A PO will be generated from SpendBridge and sent to the vendor after approval.

You might visit any number of punch-out sites while in SpendBridge, and all of the items are returned to your SpendBridge shopping cart.

Whether it's a hosted or punch out catalog you can click the little star to make any catalog a Favorite. This will cause the catalog to rise to the top of the page the next time you load it.

Favorite Catalogs

The screenshot shows the 'Favorite Catalogs' section. It features two catalog cards. The first card is for 'amazonbusiness' with a star icon and a yellow arrow pointing to the second card. The second card is for 'CDW' with a star icon and a yellow arrow pointing to the first card. The Amazon card lists 'Shop Amazon.com via SpendBridge with your Amazon Business account. Office Products'. The CDW card lists 'Computers, Hardware, Software, and IT Business Solutions. Information Technology'.

Add items to your cart on the vendor's site, and we'll transfer them back to SpendBridge during checkout.

2.3 Shop Off-Catalog

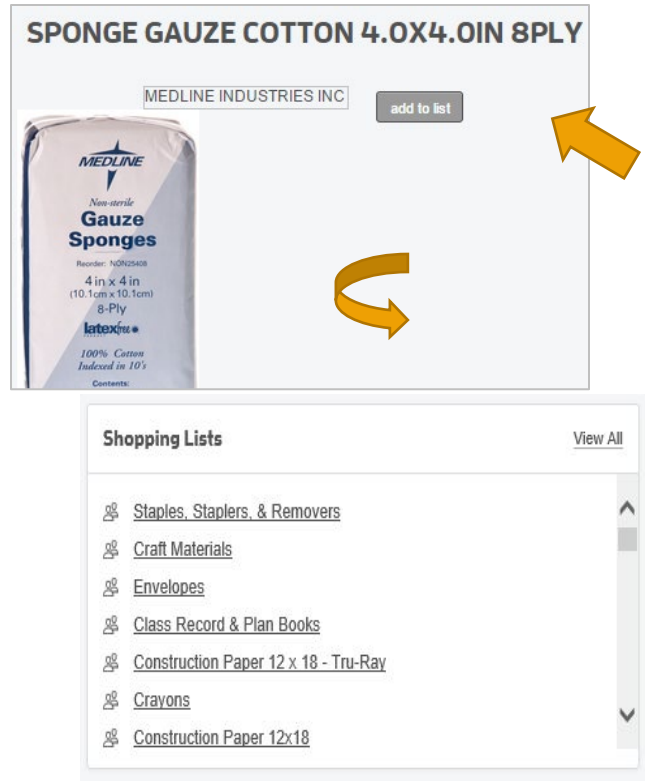
The “Shop Off-Catalog” feature allows users to generate requests for goods or services that are not in a catalog. To use the Shop Off-Catalog feature, navigate to it from your dashboard or the shop menu.

Step 1- Select Vendor

First, a pop-out screen will appear (right), asking you to select your vendor. On this page, you can search for vendors by name or vendor ID. Once you find the vendor, click “Select.”

Step 2- Enter Items

Next, you will be forwarded to the “Order Off-Catalog Items” page. You can now create “items” to add to your cart in a free-form style by entering item number, description, unit of measure, quantity, and price. If you don’t have an item number, use that field to enter a short description for your item.

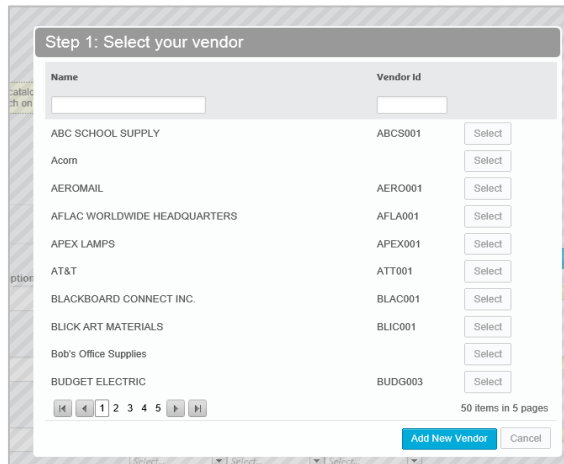


2.4 Shopping Lists

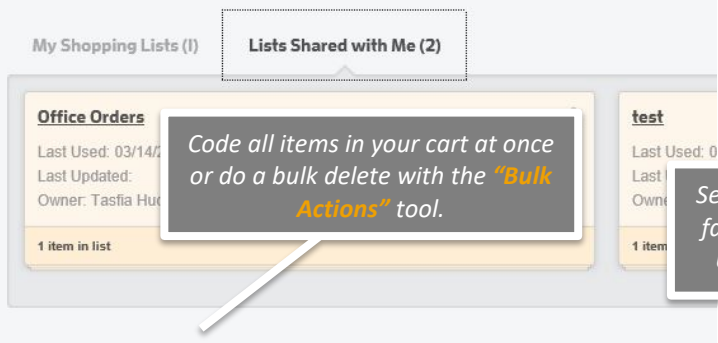
Creating Lists

User can create shopping lists of their favorite hosted catalog items within SpendBridge. To start creating a shopping list, you can simply click “Add to List” next to any of your favorite items in a vendor’s hosted catalog.

After you’ve started a shopping list, it will be accessible from your user dashboard. Open it to review the list and add items from the list to your cart.

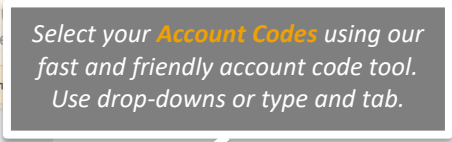


Shopping Lists



Cart Controls

Once your items are in the cart, code your items with account code information, department information, or attach files to your request.

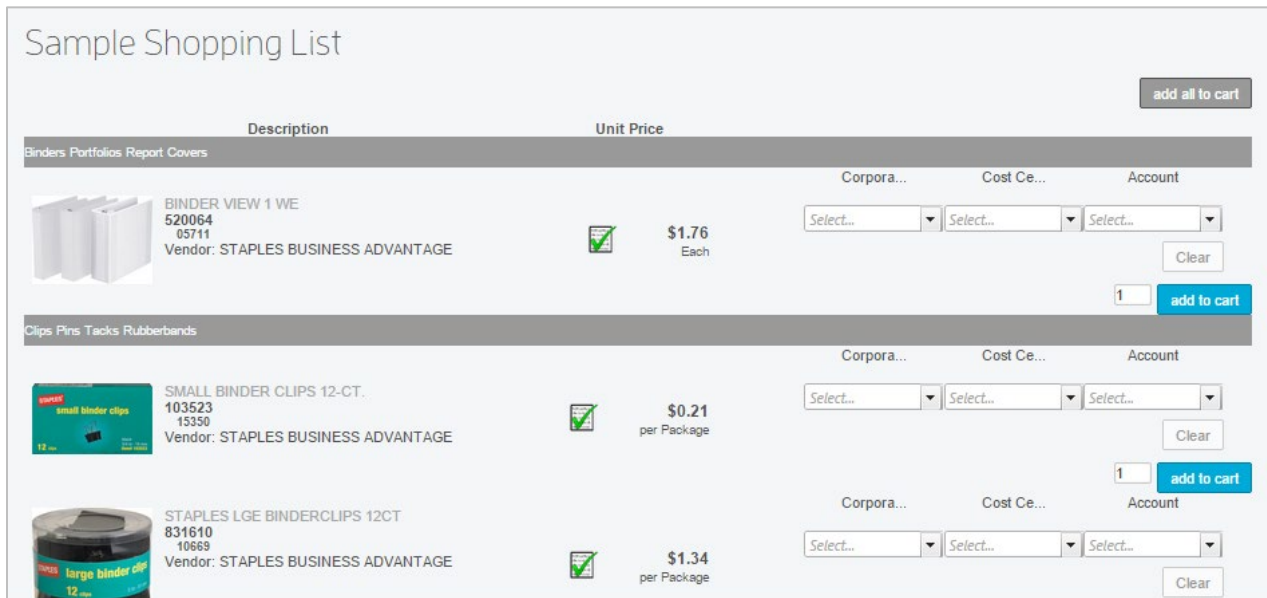


Managing Lists

Once you've created a shopping list, you can continue to add items from your cart or search results to the list to customize it to your buying habits. You can also rename it, edit it, share it with others at your organization, or create more lists. Lists can be managed in this way from the **Shopping Lists** page found under the Shop menu.

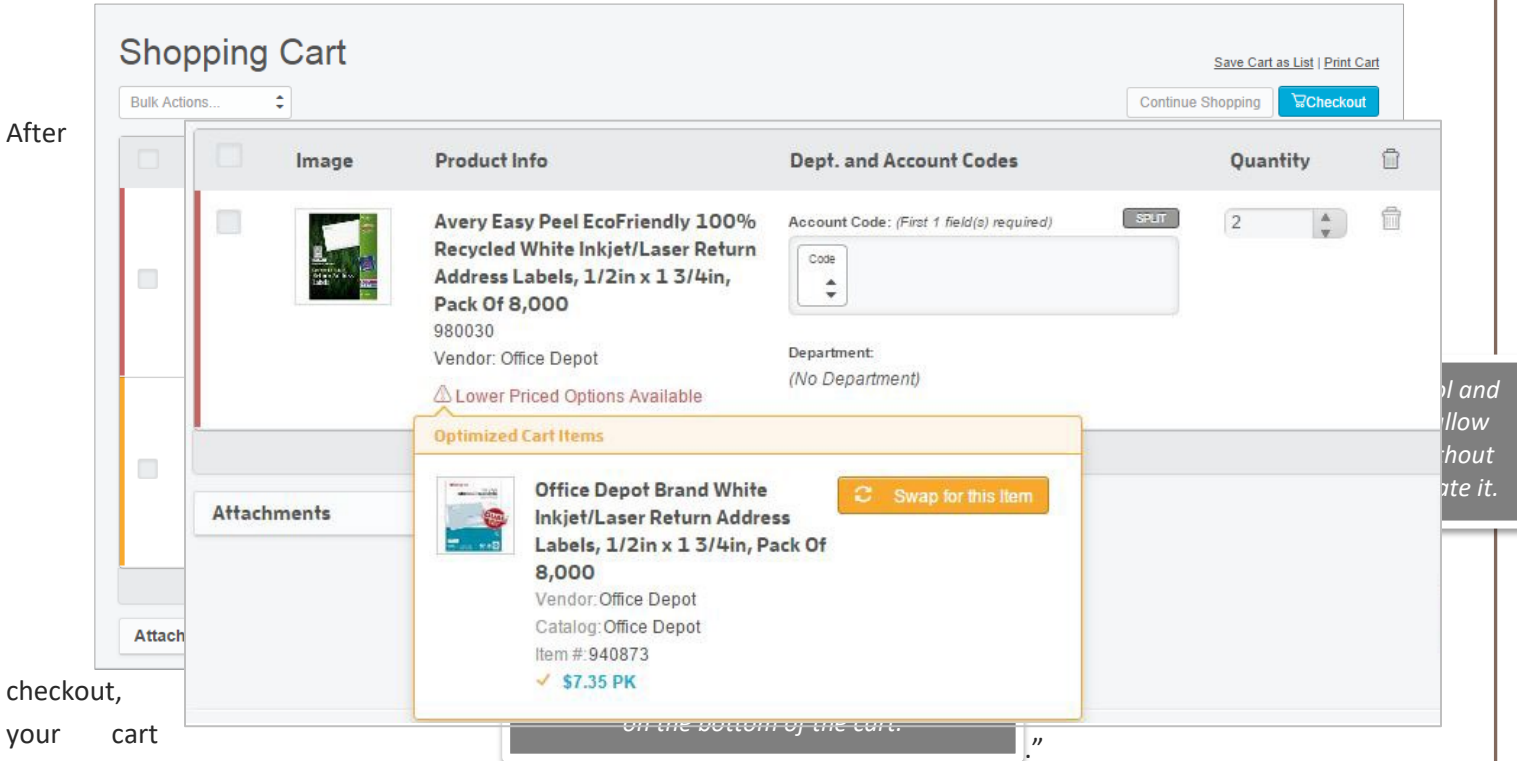
2.5 Shopping Cart

You can add items to your cart from various vendors via **Hosted Catalogs, Punchout Catalogs, Shop by Number, Shop Off-**



Catalog, and Shopping Lists. Items from various vendors will stay together in the cart and on your requests, but then will be broken out into separate POs for those vendors later.

into SpendBridge (also called “Competing Vendors” or



checkout,
your cart

will generate a request that’s routed to your approvers. Requests are automatically turned into Purchase Orders and sent to vendors upon final approval. (If the request does not require approval, SpendBridge will automatically generate a PO when you create a request and route it to the vendor).

Optimizing Items in Cart

Your cart features our **Optimize Item** tool, which searches for similar items among your **hosted catalogs** makes alternative suggestions based on price. If you see the “Lower Priced Options Available” notice under an item in your cart, hover over it to see other suggested purchases from SpendBridge.

The optimization tool is most commonly used by clients who have several vendors with similar products loaded



2.6 Checking Out

Once all the items that you’d like to request are in your cart, use “Checkout” to complete the request. During the first step of check-out, you may check the billing address and select a shipping address. You can also add notes. During the second step, you may review the request before submitting.

Step 1: Billing and Shipping

Billing and Shipping Information

Bill to: + New Credit Card
Acct: 9000-10000-00
Dodson Group Inc / SavellNow!
PO Box 40990
INDIANAPOLIS, IN 46240-0900

Ship To: + New Address
Laura Wilson - 201 N. Illinois Stre
SavellNow! (Default)
Laura Wilson
201 N. Illinois Street
Ste. 1701
Indianapolis, IN 46204

Instructions

Delivery Instructions

Instructions for All Vendors

Initial Request Note

*Users can edit the **Contact Line** of a shipping address if that permission is turned on.*

***Request Notes** stay internal, while **Delivery and Vendor Instructions** can be transferred to the vendor on the PO.*

3.1 Approval via Email

Step 2: Review Request

Review Request

Bill to: Acct: 9000-10000-00
Dodson Group Inc / SavellNow!
PO Box 40990
INDIANAPOLIS, IN 46240-0900

Ship to: SavellNow! (Default)
Laura Wilson
201 N. Illinois Street
Ste. 1701
Indianapolis, IN 46204

Delivery Instructions:

Acorn

Contact Name: Tom Jackson
Submission Method: Email
Telephone: 3175138654
Fax:
Email: jeffery.keown@bpslive.com
Account #: 9000-10000-00

Product Info

Economy Woodcase Pencil, HB #2, Yellow Barrel, Dozen, BSN37507, 37507, BSN-37507 BSN37507

Dept. an

Account Cod
Department:

Purchase Order:
Vendor: Office360
Submission Method: CML
Contact Info: Telephone: 800-824-5891

Product Info	Acct. and Dept. Codes	Qty	Unit Price	Subtotal
VL151 Series Executive High-Back Chair, Black Leather BSX-VL151SB11	Account Codes: Department Code: Information Technology	1	\$148.00 EA	\$148.00
Subtotal:				\$148.00
Fees:				\$0.00
Shipping:				\$0.00
Total:				\$148.00

Request #881956 Requires Your Approval

Request submitted by: Jeffery Keown on 9/21/2017 at 1:40 PM EST
Requires Approval: Jeffery Adds PO Number

Request Notes:
[View All Notes](#)

One-Click Actions:
This email is unique to your login. Do not forward. These actions will expire in 7 days.

*You can find the vendor contact information here, as well as the **Submission Method** we'll use to send the PO out once the request is approved.*

Subtotal: \$0.88
Total: \$0.88

Approvers may approve requests via links within the notification email (right), which contains line item detail of the request. If the approver would like to edit or divert a request, they should login to the application using the "Review, Edit, or Optimize" link.

3 Request Approval

When a user completes a request, it is routed through **Approval Workflow**. Any user required to approve a request will be notified via email when their approval is required. Approvers then have the ability to review and handle request approvals either via email or within the application.

3.2 Approval in the Application

Users with requests pending their approval can also find those requests on their user dashboard when they login.

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Quick Approve

Approvers can use the Approve, Decline, or Divert buttons on the requests cards to handle pending requests, or they can click on the request to open it, view further details from the details page.

request card, they can then use several tools to review and edit a request before they approve.

Approvers may edit the **shipping address** or **shipping address contact line**.

Optimize Items if the requestor overlooked lower price options.

Request #655975 Requested by Dan Miller on 12/3/2014 at 3:28 PM

Bill to: Acct: 9000-34850-00
Laura Armstrong
201 N Illinois Street
Suite 1701
Indianapolis, IN 46204

Ship To: Laura Armstrong - 201 N Illinois St
Demo - Parent Account (Default)
201 N Illinois Street
Suite 1701
Indianapolis, IN 46204

Instructions

Delivery Instructions

Instructions for All Vendors

Edit **Account Codes** using our fast and friendly account code tool. Use drop-downs or type and tab.

Image	Product Info	Dept. and Account Codes	Quantity	Unit Price	Subtotal
	MASK SURGICAL ANTIVRS LBE MII-CUR384S Vendor: STAPLES Lower Priced Options Available	Account Code: (First 4 fields required) Department: Diagnostic Imaging	1	\$7.94	\$7.94
	NOTE 2X2 POP UP W/DISP CA MMM-R220SS Vendor: STAPLES Lower Priced Options Available	Account Code: (First 4 fields required) Department: Diagnostic Imaging			

The item quantity control and a remove item button allow you to edit your cart without having to manually update it.

Approvers can **assign a PO number** to requests if SpendBridge isn't auto-generating them for you.

Pending Requests

Pending Invoices (0)

[Request #810559](#)

Request Date: 6/12/2017 at 4:39 PM

Pending: Jeffery Keown

Total: \$8.76

Workflow Age: 41 days

Once an approver approves a request, the request will route to the next approver in workflow. Upon final approval, SpendBridge will generate a PO for each vendor and dispatch them.



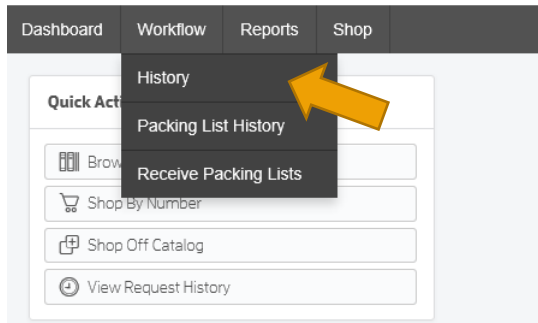
The Request Approval Page

When an approver opens a request to edit, either from their approval notification email or via the dashboard

The "Approve and Next," "Decline and Next," and "Divert and Next" buttons allow approvers to quickly process requests and immediately open the next.

4 History

The “History” page allows users to view their request history and track where their request is in the approval



Once on the History page, users can use filters to find a specific request, view pending approvers, and even use the actions drop down to the right of a request to view request details or add all the items from a previous request back to the shopping cart.

process.

History

Requests and Purchase Orders

Request			
Request #	Date	Requestor	
769656	5/20/2016	Demo User	\$
768101	5/16/2016	Tom Jackson	\$
763817	4/27/2016	Tom Jackson	\$
763814	4/27/2016	Tom Jackson	\$
763384	4/25/2016	Jeffery Keown	\$
763382	4/25/2016	Tom Jackson	\$
762753	4/21/2016	Tasfia DEMO	\$
760295	4/11/2016	Tom Jackson	\$
759750	4/07/2016	Tom Jackson	\$
759368	4/06/2016	Jeffery Keown	\$

1 2 3 4 5 ... 20 items per page

4.1 Purchase Orders

Once a request has been finally approved (or for requests that did not require approval), SpendBridge generates a PO for each vendor on the request and sends those POs electronically to the vendors. In some cases, vendors are not setup for this sort of PO submission. If so, SpendBridge will notify you to submit the PO manually. To see records of purchase orders, you can use the Purchase Order side of the History page.

Purchase Order			
Vendor Name	PO Number	Amount	Dispatch
STAPLES	Pending	\$58.95	Pending
Friends	990540	\$539.80	Submitted
STAPLES	990539	\$29.00	Submitted
Rosa's Office Plus	990537	\$7.65	Submitted
Bob's Office Supplies	990541	\$99.90	Submitted
Office360	990536	\$251.50	Submitted
Amazon - Demo	990538	\$74.30	Manual
Friends	990535	\$269.90	Submitted
STAPLES	990533	\$61.19	Submitted
Office360	990534	\$31.79	Submitted
Dominion	View PO		
Friends	990531	\$2,699.00	Submitted
Office360	990530	\$2.26	Submitted
Office360	990529	\$229.90	Submitted
BLICK ART MATERIALS	View PO		
Dominion	View PO		

5 Receiving Module

In addition to our purchasing module, SpendBridge also offers clients tools to capture receiving information. Users may enter receiving information against a PO in SpendBridge, attach packing slips, and review receiving history and reports. This can be useful for clients who want to ensure that they receive all items ordered on a PO before they pay an invoice.

Like the request history page, you can use filters to find a specific PO, view the status of the PO submission, and even use the actions drop down to the right of a PO to view the PO or resubmit or void a PO, if you have those permissions.

5.1 Receiving Packing Lists

To enter receiving information in SpendBridge, navigate to **Workflow->Receive Packing List**. You'll be presented with a list of POs generated in SpendBridge. This area shows all POs that have not been fully received. To view POs that have been fully received, click "show all POs" at the top.

Receive Packing List

Start Date: End Date:

	Release Date	Placed By	Vendor	PO
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Receive"/>	4/10/2018 5:46:34 PM	Hernandez, Janet	REALLY GOOD STUFF INC.	991
<input type="button" value="Receive"/>	4/10/2018 5:46:32 PM	Hernandez, Janet	QUILL CORPORATION	991
<input type="button" value="Receive"/>	4/10/2018 5:46:25 PM	Hernandez, Janet	QUILL CORPORATION	991
<input type="button" value="Receive"/>	3/21/2018 7:40:52 PM	Hernandez, Janet	SCHOOL NURSE SUPPLY, INC.	991
<input type="button" value="Receive"/>	1/31/2018 6:32:39 PM	Hernandez, Janet	QUILL CORPORATION	991
<input type="button" value="Receive"/>	1/30/2018 5:05:10 PM	Hernandez, Janet	QUILL CORPORATION	991

Page size: 25

Search for the PO for which you received a package using the filterable fields at the top. Hit "Receive" once you find the PO.

Entering Receiving Information

Once you click “Receive” next to a PO, the details of the PO will open, and you may enter information regarding the

After a packing list has been received, you can view or edit it on the **Packing List History** page, also found in the Workflow menu.

Receive Packing List

PO Number: 990006 Received By:
 Vendor: UNIVERSAL HOSPITAL SVCS INC Packing List Number:
 Release Date: 12/5/2014 Attachment:

Showing 1-5 of 5 Results

Item Number	Description	Quantity	Quantity Previously Received	Quantity Received
ZSR	Glide Air Transfer	1	0	<input type="text" value="0"/>
TMB	Trapeze Free Stand	1	0	<input type="text" value="0"/>
TGE/TIU	Bari Commode	1	0	<input type="text" value="0"/>
SRT	Triflex 2 Trapeze	18	0	<input type="text" value="0"/>
STO	Thereturn	1	0	<input type="text" value="0"/>

Showing 1-5 of 5 Results

quantity of items you received in the package, as well as attach a copy of the packing slip. You must fill in the Received By and Packing List Number fields before the line items will become editable.

When you finish, click “Save.” Then, if the all the items on the PO were received, the PO will fall off of the “Receive Packing List” page. If you partially receive a Packing List, you may return to that PO later from the “Receive Packing List” page and enter additional packing list data and attachments.

5.2 Packing List History

Packing List History

Packing List Number	Received Date	Received By	PO Number	PO Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
86102	3/13/2018 1:42:19 PM	JANET	991106	\$1,622.52
991093	3/13/2018 12:58:01 PM	JANET	991093	\$602.07
78482196	3/13/2018 12:48:51 PM	JANET	991108	\$983.75
111108196	3/13/2018 12:40:26 PM	SRA. SHAMMAS	991107	\$159.92
991102	3/5/2018 12:33:07 PM	JANET	991102	\$499.01

6 Invoice Module

In addition to our purchasing and packing list modules, SpendBridge also offers clients tools to receive invoices in SpendBridge and route those invoices for approval and payment.

This can be useful for clients who want to keep their purchasing, receiving, and invoicing processes in one application. SpendBridge also provides reports that can be imported into financial systems which highlight purchase orders that are ready to be paid, because they have a matching invoice and a matching packing slip in SpendBridge.

6.1 Receiving an Invoice for a SpendBridge PO

In SpendBridge, you have the option to receive invoices that match a PO that you’ve made in SpendBridge or to receive a “non-PO invoice.” To receive an invoice against a PO in SpendBridge, navigate to **Workflow->Receive Invoice**. You’ll be presented with a list of POs called the Receive Index. This area shows all POs that have not been

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fully invoiced. To view POs that have been fully invoiced, click “Include received.”

Search for the PO for which you received an invoice using the filter fields at the top. Hit “Receive” once you find the PO.

Receive Index

Bulk Actions... + New Non-PO Invoice Upload Received Invoices Upload Non-PO Invoices

	PO #	Amount	Vendor
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	273820	\$334.24	Benco - Punchout
<input type="checkbox"/>	273826	\$620.00	TRICOR PRINT COMMUNICATIONS, INC.
<input type="checkbox"/>	273778	\$797.70	BIOMET 3I, INC dba ZIMMER BIOMET
<input type="checkbox"/>	273708	\$543.97	Benco - Punchout
<input type="checkbox"/>	273707	\$267.50	AMERICAN ORTHODONTICS
<input type="checkbox"/>	273825	\$620.00	TRICOR PRINT COMMUNICATIONS, INC.

6.1.1 Column Headings

On the next page, you can see a full page illustration of the Receive Index with all of the column headings.

PO# - This is the original request's Purchase Order Number. Filter on this column to find the specific PO you want to receive against.

Amount – The total of the PO. Do you want to process every invoice over \$500? Then filter here to see only those above your target amount.

Vendor – The Vendor the PO was placed to. Filtering here allows you to consolidate your receiving activities to single vendor.

Placed By – This is the user who placed the Request. Filtering here isolates a given user.

Status – Has this PO had receiving against it? This column shows this easily.

Account – If you have multiple (*Child*) accounts, this column is very handy for isolating a single child and process those invoices in a batch.

All of these filters can be used at once. Do you want to find all of Matt Smith's POs placed with Amazon over \$50? In June? You can do it!

To reset all of these filters, just click the *Clear Filters* button.

Receive Index

PO #	Amount	Vendor	Placed By	Release Date	Status	Account	Actions
990956	\$99,88	Supplies - Punch Out	Omair Bravo	09/28/2017	Not Received	CMC - Los Angeles (Silverdale)	Receive...
990540	\$14,99	Amazon	Jesus Lopez	09/28/2017	Not Received	CMC - Los Angeles (Mar Vista)	Receive...
990137	\$21,000.00	Dreambox Learning	Lindsay Phillips	09/28/2017	Not Received	CMC - Los Angeles (RSO)	Receive...
990073	\$55.20	Amazon	Nancy Becerra	09/28/2017	Not Received	CMC - Los Angeles (Silverdale 6-8)	Receive...
990072	\$337.71	Amazon	Nancy Becerra	09/28/2017	Not Received	CMC - Los Angeles (Silverdale 6-8)	Receive...
100463	\$632.26	Amazon	Marcos Rodriguez	09/28/2017	Not Received	CMC - Los Angeles (Hollywood)	Receive...
100462	\$12.95	Amazon	Marcos Rodriguez	09/28/2017	Not Received	CMC - Los Angeles (Hollywood)	Receive...
100464	\$589.13	Amazon	Marcos Rodriguez	09/28/2017	Not Received	CMC - Los Angeles (Hollywood)	Receive...
990948	\$3,483.11	Great Minds	Nancy Becerra	09/28/2017	Not Received	CMC - Los Angeles (Silverdale)	Receive...
990953	\$282.49	Amazon	Nancy Becerra	09/28/2017	Not Received	CMC - Los Angeles (Silverdale)	Receive...
100461	\$100.87	DISCOUNT SCHOOL SUPPLY	Marcos Rodriguez	09/28/2017	Not Received	CMC - Los Angeles (Hollywood)	Receive...
990952	\$95.94	Supplies - Punch Out	Omair Bravo	09/28/2017	Not Received	CMC - Los Angeles (Silverdale)	Receive...
990538	\$8.99	Amazon	Jesus Lopez	09/28/2017	Not Received	CMC - Los Angeles (Mar Vista)	Receive...
990539	\$26.20	Supplies - Punch Out	Jesus Lopez	09/28/2017	Not Received	CMC - Los Angeles (Mar Vista)	Receive...
990070	\$199.99	Amazon	Nancy Becerra	09/28/2017	Not Received	CMC - Los Angeles (Silverdale 6-8)	Receive...

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6.1.2 Batch Processing

You can use the click-boxes on the left to select multiple invoices. As you process each one, you can flip to the next one with the Next button, or have it flip automatically when you submit each one.

6.1.3 Receive Invoice Data

On the “Receive Invoice” page, enter the invoice number, date, and the quantities of items invoiced as compared to the PO. If your invoice had additional tax, shipping, or miscellaneous fees, you can add them on this page.

The screenshot shows the 'Receive Invoice' form. At the top, it displays the PO Number (991109) and Vendor (QUILL CORPORATION (QUILL001) (EJE Academies)). Below this, the Invoice Number (6561) is entered. A summary row shows Ext Price (\$0.00), Shipping Charge (0), Tax Amount (0), and Misc (0). The 'Items' section contains a table with two rows of item data:

Qty (0 of 120)	Unit Price (\$3.29)	Ext Price	Fee	Credit
0	3.29	\$0.00	0	0

Below the table are 'EDIT' and 'CLEAR' buttons, and a message: 'Multiple account codes exist ⓘ'. A second item row is partially visible below, showing Qty (0 of 2), Unit Price (\$73.49), Ext Price (\$0.00), Fee (0), and Credit (0).

You can also use the attachments area to attach a scanned or PDF copies of the invoice. As before, you can distribute funds using “Split Reference Codes” on each line, if needed. Just enter the codes and amounts, click save and the splits are ready to go.

This screenshot is a close-up of the item table and buttons from the 'Receive Invoice' form. It shows the following data:

Qty (0 of 120)	Unit Price (\$3.29)	Ext Price	Fee	Credit
0	3.29	\$0.00	0	0

Below the table are 'EDIT' and 'CLEAR' buttons, and a message: 'Multiple account codes exist ⓘ'.

6.1.4 Upload Received Invoices

You can upload a batch of invoices using an Excel file. You can even create a batch file of Non-PO invoices for upload. This works exactly as you’re used to, except that columns have been added for Fees and Credits.

6.1.5 Receiving a Non-PO Invoice

If you have an invoice that needs to be entered in SpendBridge, and you did not generate a matching PO in SpendBridge, you need to create a “non-PO” invoice. Non-PO invoices may be used, for example, to pay an electrical bill or other type of service for which a PO was not put through the system.

Navigate to **Workflow->Receive Invoice**. “Create Non-PO Invoice.”

Receive Index

The screenshot shows the 'Receive Index' header. It includes a 'Bulk Actions...' dropdown menu and two buttons: '+ New Non-PO Invoice' and '+ New Invoice'.

Enter the Invoice Number, grab a Vendor from the drop down (all of your Vendors are loaded into this field) fill in the Invoice Issue Date, and the optional Due Date. Any changes you make are recorded in the “Changes” area at the bottom of the page.

1 of 1 NA

Invoice Number:

Vendor:

Vendor Address:

Ext Price	Shipping Charge	Tax Amount	Misc	Fee
\$0.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0.00

Items

+ Add Item

When you have finished entering your details, just hit submit to send it to the Workflow Engine.

6.1.6 Docking and Undocking Documents and Images

If you have a second monitor, you can undock your PDF preview window and move it to have more room to work. This window is dynamic, and linked to the main window. Should you flip to a new invoice, the undocked viewer will load the next PDF if it is available.

Dock Undock

No file attached

Upload File

Max file size is 5 MB

Add Items and Attachments

Enter the date and invoice number in the top fields. Then, add line items to the invoice in a “free-form” style using the blank “Add Item” fields at the bottom. You may also add attachments and fees. Once all the line items are added, check the total and click “Done.”

6.2 New Invoice from File

Vendors will begin emailing invoices to SpendBridge, and we’ll start tucking them away for you to match up to your

invoices. Using the New Invoice from File button, you’ll grab files using the dialogue below:

File Name	From Address	Vendor	Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
hdsupplyfacilities_14122168_...	business.operations...	Northwest Evaluation...	05/07/2...
hdsupplyfacilities_14122168_...	billingsupport@financi...	PURE WATER PART...	05/07/2...
6.jpg	vendor@emergencygl...	24 HOUR EMERGEN...	05/07/2...
4.jpg	vendor@emergencygl...	24 HOUR EMERGEN...	05/07/2...
3.jpg	vendor@emergencygl...	24 HOUR EMERGEN...	05/07/2...
2.jpg	vendor@emergencygl...	24 HOUR EMERGEN...	05/07/2...
1.jpg	CUSTOMERSERVIC...	FOLLETT SCHOOL S...	05/07/2...

15 per page

Showing 1 - 7 of 7 rows

Once matched up, they are received like any other invoice.

6.3 Invoice Approval

Once an invoice has been received, it is automatically routed through invoice Approval Workflow. Similar to requests, invoices may be approved via email or in the application, depending on permissions.

An approver may edit, void, divert or approve an invoice.

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1 of 1 ⏸ Pending Entered by Nanc

Invoice Number: REIM02/07/18RG Vendor: Robert Gloria (GLOR001) (CWC - Los Angeles (Silverlake 6-8)) Vendor Address: Robert Gloria
Robert Gloria

[Edit Vendor](#)

Ext Price	Shipping Charge	Tax Amount	Misc	Fee	Credit
\$63.01	0	0	0	\$0.00	\$0.00

Payment Information [+ Add Payment](#)

Date	Check #	Amount	Note

Items

4 Teachers pay teachers-atmospheric pressure and weather conditions

Qty	Unit Price	Ext Price	Fee	Credit	Subtotal	Department
1	2	\$2.00	0	0	\$2.00	TB-7D

Account Code: 4210-MS

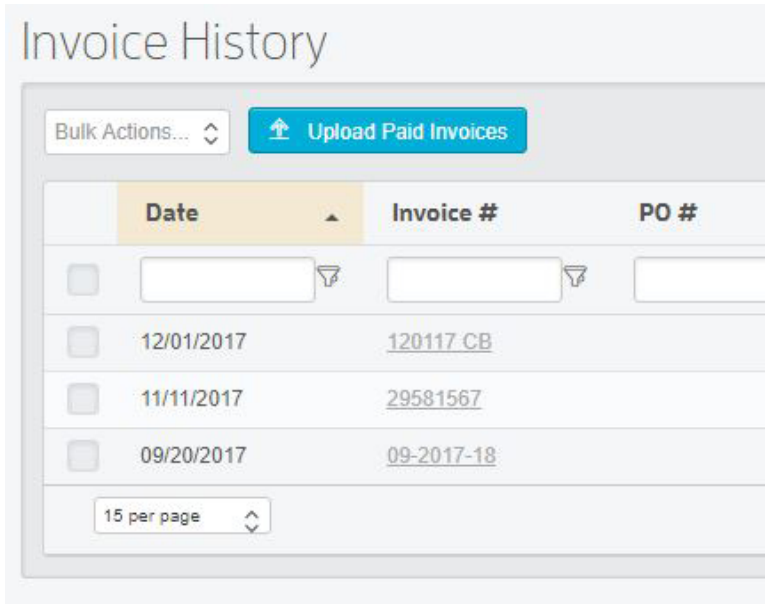
[SPLIT](#) [CLEAR](#) Object Code: 4... Location: MS

10 99 only store-masking tape, foam board, bamboo, and balloons for lab

Qty	Unit Price	Ext Price	Fee	Credit	Subtotal	Department
1	6.92	\$6.92	0	0	\$6.92	TB-7D

6.4 Invoice History

The “Invoice History” page allows users to view and edit historical invoices and track invoice approval. It works much as it did before. It does, however, contain new columns that you will find very useful.



The left half of the Invoice History page...

Click-Boxes - You will notice the column of click-boxes down the left hand side. These are Bulk Action selectors. You can select as many or as few as you like, and click on Bulk Actions above to Mark Paid or Enter Payments for your selected Invoices.

Date – This is the date the invoice was entered.

Invoice # - This is the PO number the Vendor or Receiver assigned. You can click on the Invoice Number to view or edit the Invoice.

PO # - If the original document was a PO, you’ll be able to find that reference number here.

Check # - Was this paid? On which check? You can filter to find a certain check, or simply use this as a reference.

Amount – This is the total of all lines on the invoice.

Due – How much is left to pay on this Invoice?

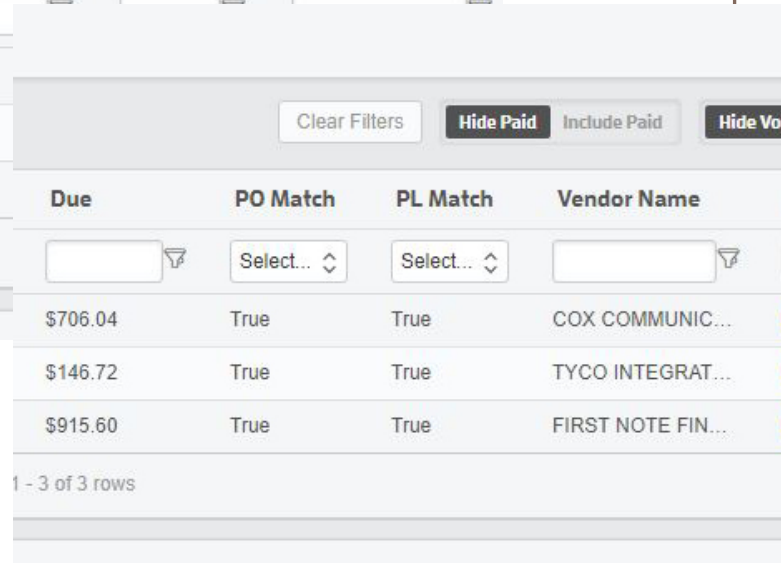
PO Match – Do the Invoice received quantities match the PO? This column is TRUE or FALSE to show you.

PL Match – Like PO Match above, PL Match shows whether the Invoice is a match for the Packing List.

Vendor Name – As in the Receive Index, Vendor Name allows you to filter for certain vendors.

Status – This column shows the Approval Status of the Invoice.

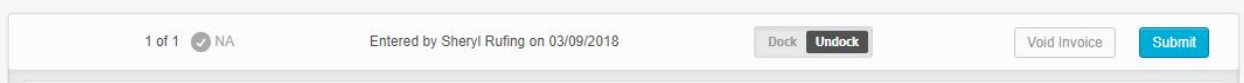
Account – If you have multiple Child Accounts, you’ll see which one of them generated the Invoice.



... and the right half of the Invoice History page.

6.5 Edit Invoice

You'll see this "Action Stripe" across the top of the page. It stays in place as you scroll down the page.

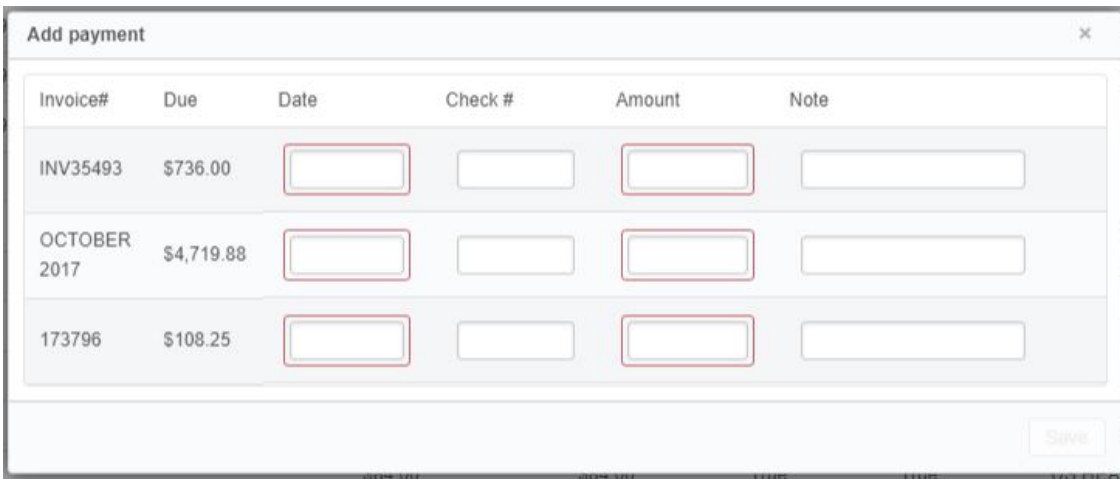


This page works much like the Receive Invoice page, but allows you to make changes if you are authorized.

PO Number 991046	Vendor LAKE SHORE	Vendor Address 2695 E. DOMINGUEZ STREET CARSON CA 90895	Invoice Due Date <input type="text"/>			
Invoice Number 1245			Invoice Issue Date 03/16/2018			
Invoice Sub Total \$ 0.00	Shipping Charge \$ 0.00	Tax Amount \$ 0.00	Misc \$ 0.00	Fee \$ 0.00	Credit \$ 0.00	Invoice Total \$ 0.00
Payment Information + Add Payment Mark Invoice as Fully Paid						
Date	Check #	Amount \$	Note			

6.6 Paying Invoices

You can make payments by using the click boxes to invoke this popup:



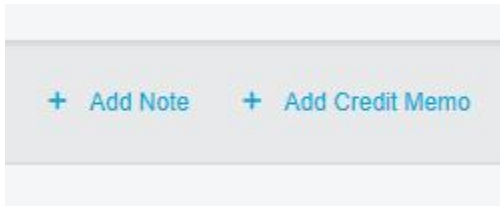
Invoice#	Due	Date	Check #	Amount	Note
INV35493	\$736.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
OCTOBER 2017	\$4,719.88	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
173796	\$108.25	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

With it, you'll add the **Date**, **Check #**, **Amount**, and any notes you feel relevant to the payment. Once these are entered, hit Save to return to Invoice History.

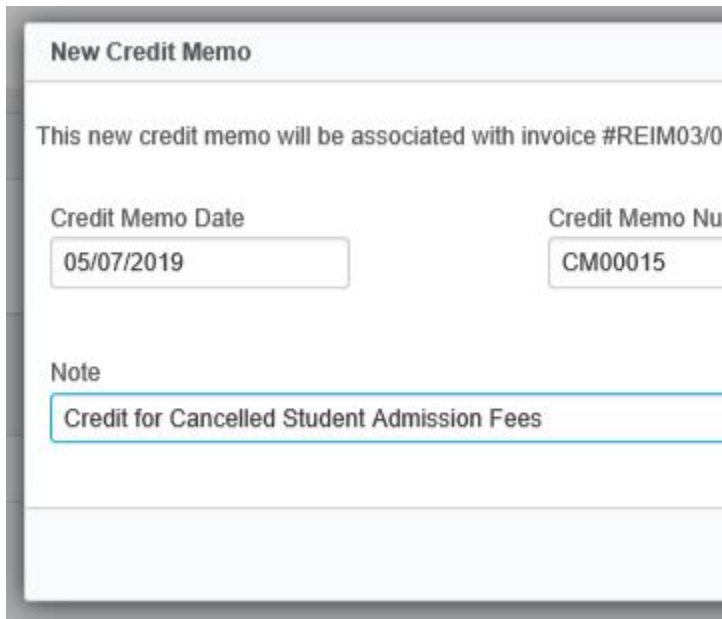
7 Credit Memos

When using Invoices in SpendBridge, the possibility exists that you will use the platform to receive and acknowledge Credit Memos. To create one, click on the relevant Invoice in Invoice History.

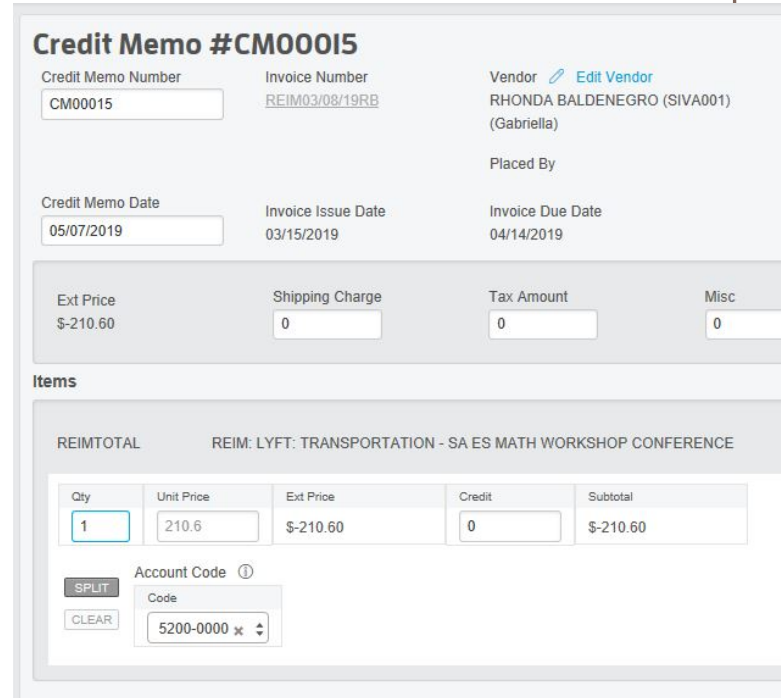
Just above the Notes section, you'll see a Credit Memo link.



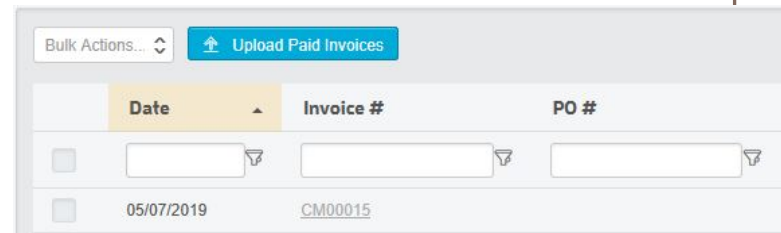
Clicking this link takes you to the Create Credit Memo Pop-up.



From here, you can enter the issue date, the Credit Memo Number and a note for anyone who accesses the document. When you hit create, you are taken to a specialized copy of your invoice.



When submitted, the Credit behaves like any other invoice document. That is moves through approval as if it were an invoice, triggering all relevant workflows.



When approved, a Credit can be acknowledged by "paying" it. Note the lack of a check number in the shot below.

Add payment

Invoice #	Due	Note
CM00015	(\$210.60)	<input type="text" value="This is a credit."/>

8 Contracts

The *Contracts* feature in SpendBridge allows a user to input contract terms and dates for items purchased through SpendBridge. By using the contracts feature, you can allow users visibility to which items are currently on contract and which contract items have expired. This is a quick, easy, and important step to implement after you create a catalog.

8.1 Contract History

By default, Contract History shows all existing contracts. It is from here that you create, edit, and view your contracts. You can filter them by Contract Grouping (if they exist) in order to see similar Contracts.

Maintain Contracts

[Add New Contract](#)

Account	Contract Name	Contract #	Vendor Name	Effective Date	Exp
SpendBridge	Grainnet	88292	GRAINGER	1/01/2017	12/31/20
SpendBridge	Medline	98877	Medline	8/01/2016	7/31/20*

100 items per page

8.1.1 Account

If you have child accounts, and they each have contract agreements of their own, you'll see the child account names in this column. It defaults to your account.

8.1.2 Contract Name

This is the friendly name of the contract. It should be an easy to remember name probably using your organization's jargon for this sort of contract and vendor. E.g. "Staples 2018" or "Office Products FY18" or similar entries.

8.1.3 Contract Number

This is a number assigned to the contract for purposes of Catalog Uploads and tracking. If you include the contract number on your catalog upload, those items will be added to that contract when the catalog is updated.

8.1.4 Vendor Name

This is the name of the contract's vendor, you can sort on these to see specific contracts in case you have more than one contract per vendor. The item prices uploaded in this contract will be available whether they are purchased through a Hosted or Punch Out catalog.

8.1.5 Effective Date

This is the start date of the contract. If it is in the future, and the contract is "active" the prices will not be applied until this date.

8.1.6 Expiration Date

If the contract has an expiration date, you'll see that here.

8.1.7 Status

Active – This contract status indicates the document has been approved and is active. If the effective date is in the past, the contract will apply to items purchased.

Draft – This contract status indicates the document has not been submitted for approval.

Pending Approval – This is a contract status that indicates a contract has been submitted but has not been approved just yet.

8.1.8 Notes

Reminder text can be added during contract edit. The last such note is displayed here.

8.1.9 Attachments

The presence and number of attachments is indicated here.

8.2 Agreement Types

The most important attribute of a Contract is the Agreement Type.

8.2.1 Item Price

Contract Name and Vendor are required for Item Price Contracts. When you bring items from punch out an Item Price contract will intercept it, correct the price and alert you to the price discrepancy.

8.2.2 Service

Contract Name and Vendor are required in the case of a Service Contract. These sorts of contracts do not concern themselves with physical items, but with services performed by your vendors. Examples include ground keeping, uniform maintenance and copier rentals.

8.2.3 Other

Only Contract Name is required for a Contract to be created if the agreement type is **other**. Other is a catch all for those contracts you need to get into your Contract Approval Workflow before you decide on the vendor.

The screenshot shows a form with two columns of fields. The left column contains: 'Contract Name' (text input), 'Contract Number' (text input), 'Effective Date' (date picker showing 11/07/2017), and 'Perpetual Contract' (dropdown menu with 'Yes' selected). The right column contains: 'Vendor' (dropdown menu with 'Select Vendor'), 'Agreement Type' (dropdown menu with 'Other'), 'Agreement Admin' (text input with 'Jeffery Keown'), and 'Additional Admin' (dropdown menu with 'Select Person or Group').

8.3 Other Contract Attributes

Contract Name

This is the Name of the Contract, try to use an easy-to-remember, in-house term.

Contract Number

This is the number assigned to the Contract. It is used in Catalog Uploads to tie catalog items to Contract Pricing. If the Contract Number appears on the Catalog Upload, the items will be added to your contract.

Effective Date

This is the date the contract becomes effective. If this date is in the future, the items will begin using the contract on that date.

Perpetual Contract

If the contract never expires, select *Yes*. If not, select *No*. An Expiration Date picker will appear. If the Expiration Date is in the past, the contract will not apply to orders going forward.

Vendor

The contract must apply to one vendor. Choose that vendor here. When you add items, they will use the pricing herein whether they are hosted or punch out items. They aren't constrained by catalog – only vendor.

Agreement Admin

Who takes care for and maintains this contract? The Agreement Admin is normally the person creating the Contract, but perhaps not. This can be a User or Security Group.

Additional Admin

Other Users or Groups who have visibility and editing powers over this contract.

Per Order Minimum

This is a reminder field that reminds the admin of minimum dollar amounts under the contract. It does not constrain purchasing.

Per Order Maximum

This is a notes field that reminds the admin of maximum dollar amounts under the contract. It does not constrain purchasing.

Lifetime Max Amount

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This is a reminder field that reminds the admin of maximum dollar amounts under the contract's entire active period. It does not constrain purchasing.

Contract Groupings

Groupings act as "Tags" to allow you to search and edit based on common features. Groupings can be anything you find useful. You can edit these by

Payment Terms

Add your payment terms here as a reminder of early pay discounts and such.

Add Term

Title

Type

Days

Adjustment

A

Contract Prices

This area is used to upload or add contract pricing. A template is available behind the "Upload XLS" link.

Notifications

You can set an Expiration Warning and alerts in this area. How much time do you need to renew or research a new contract? This section will allow you to get an email in advance.

Add Notification

Notification Type

Add Notification

Notification Type

Notify User/Group

When Contract Expires In days

Notes

Changes

The Changes area keeps a log of updates to the contract after its creation. You can add notes to the timeline as well.

Changes Showing 4 of 4

Time	Type	User	Text
11/07/2017 at 04:32 PM	Field Changed	Jeffery Keown	Changed field 'Agreement Type' from
11/07/2017 at 04:32 PM	Field Changed	Jeffery Keown	Changed field 'Vendor' from " to 'a'.
10/31/2017 at 04:16 PM	Workflow Status Updated	Allen Federman	Updated workflow status from 'Draft'
10/31/2017 at 04:16 PM	Workflow Submitted	Allen Federman	Submitted contract for Workflow eval

8.4 Uploading Contract Items

8.4.1 With your Catalog Upload

Adding items to a contract is very similar to adding items to a catalog. If you include the Contract Number on your Catalog Upload, the items will be added to the contract as the catalog upload processes. You may either add items to a contract individually or as an Excel upload.

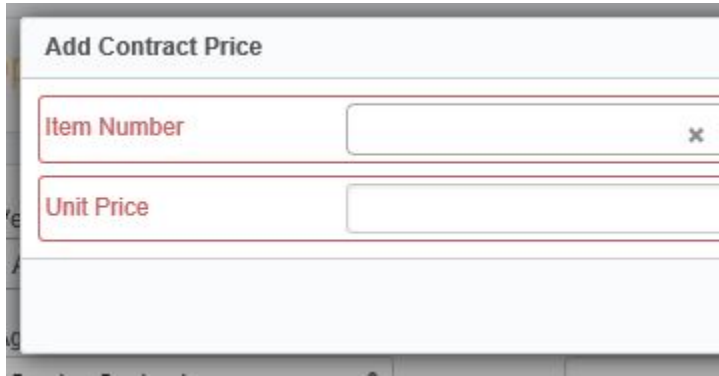
8.4.2 Directly to your Contract

Find the Contract Item Number Price Upload template on the bottom of the *Edit Contract* page. Download the template, and complete the *Catalog Name*, *Item Number*, and *Price* field for each item. This information can easily be pasted from your catalog item upload

sheet. Then, click “Upload Contract Pricing” and wait for a confirmation that all items processed correctly.

8.4.3 Manual Entry

To add the items to a contract individually, click “Add a New Contract Item Price” on the Items page. Then, enter the Catalog, Item Number, and Unit Price for the item.



8.5 Contract workflow

You can create workflow rules to guide the approval of all sorts of Contracts. It only has one condition, either a contract exists or it does not. Contracts move through workflow much as invoices and requests do, with approvals and generated in an order you can customize.



Contracts can be approved or diverted. There is no concept of a “rejected” contract in SpendBridge.

8.6 Price Discrepancy Log

With Item Price Contracts, you can run a report at Reports-Spend-Price Discrepancy Log. It will show you where and when your punch out catalogs required correction by the Contract module. This is handy for reigning in your vendor’s price increases and any weird issues that might arise.

PriceDiscrepanciesLog

Date Occurred	Vendor	Item Number	Requestor	Cont
10/6/2017 12:08 PM	STAPLES - Local	135848	Bill Groeneveld	STA20
9/12/2017 9:30 AM	STAPLES - Local	135848	Tom Jackson	STA20
9/12/2017 9:24 AM	STAPLES - Local	135848	Tom Jackson	STA20
9/12/2017 8:56 AM	STAPLES - Local	163865	Tom Jackson	STA20

9 Reports

SpendBridge has a variety of reports you can use to track spend, budgets, usage, approval information, and two- and three-way matches between POs, packing lists, and invoices. Below is an overview of just some of the reports SpendBridge provides.

Report Category	Report Name	Description
Spend	Dynamic Spend Report	Allows the user to view categories, department
Spend	Raw Spend Report	Allows the user to view
Spend	Contract Pricing Summary	Allows the user to see a
Spend	Spend by Vendor Attribute	Allows the user to view vendor attributes such
Spend	Purchase Order Detail	Allows the user to view
Spend	Optimized Savings Detail	Allows the user to view
Spend	Vendor List	Shows complete list of v
Spend	Vendors Available	Shows active vendors a
Spend	Budget Utilization	Allows the user to view remaining for various b pulled for budgets load departments.
Spend	Change Log	Displays all changes ma
Accounts Payable	Two-Way Match Open Accounts Payable	Allows the user to view and order and are read
Accounts Payable	Three-Way Match Open Accounts Payable	Allows the user to view order and are ready to
Accounts Payable	Two-Way Match Exceptions	Shows open POs where

Accounts Payable	Three-Way Match Exceptions	Shows open POs where a three-way match is not complete.	coming soon!) and create support tickets which are submitted to our support team at support@spendbridge.com .
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Additional reports may be available depending on the modules you utilize and your permissions. Check out reports by navigating to the Reports menu, or contact SpendBridge for support.

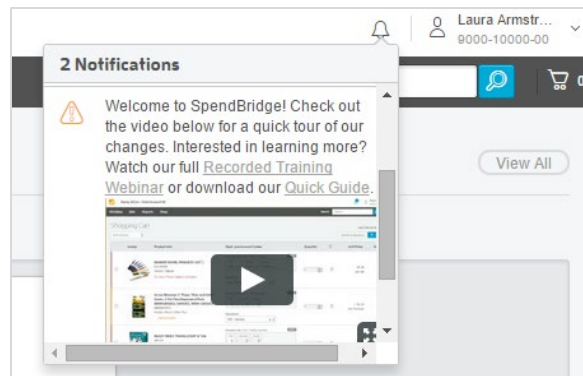
Users can also request support by simply emailing or calling us. Our support team is available Monday to

10 Going Further

SpendBridge also provides tools for clients to manage budgets, track inventory, and integrate with various financial and ERP systems. SpendBridge can provide support with additional features as needed.

10.1 Notifications

Site administrators can post notifications on users' SpendBridge dashboards to communicate important announcements and information. SpendBridge will also post updates and links to informational videos and PDFs when




Friday, 8 a.m. to 5 p.m. EST.

support@spendbridge.co
1.877.208.4817

Welcome to the Help Center!

SpendBridge's user-friendly interface makes our clients independent and efficient. But there's always more to learn! Our new Help Center will contain all the resources to take your e-procurement program to the next level. We'll continue adding content here over the next couple weeks and months, so keep checking back for more. Need immediate help? [Submit a Support Request](#)

Training Videos



[Submit a Request](#)

[Announcements](#)

[FAQs](#)

TRENDING QUESTIONS [Community browse](#)

appropriate, such as when new tools or features are released.

10.2 Customer Support

For more help, check out our Help Center at <http://support.spendbridge.com>. Users can view additional training material on this site (with more