END-USER GUIDE

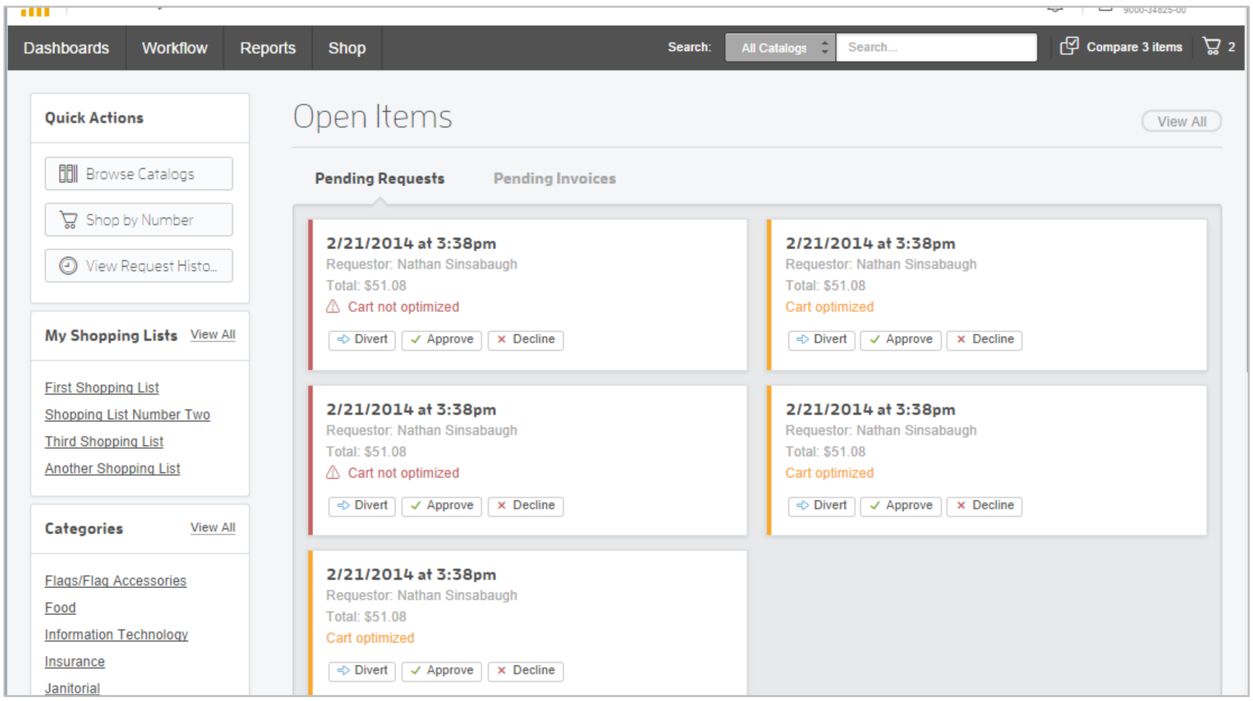
The Procure-to-Pay Process

Version 1.3
June 7, 2019

Contents

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



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).

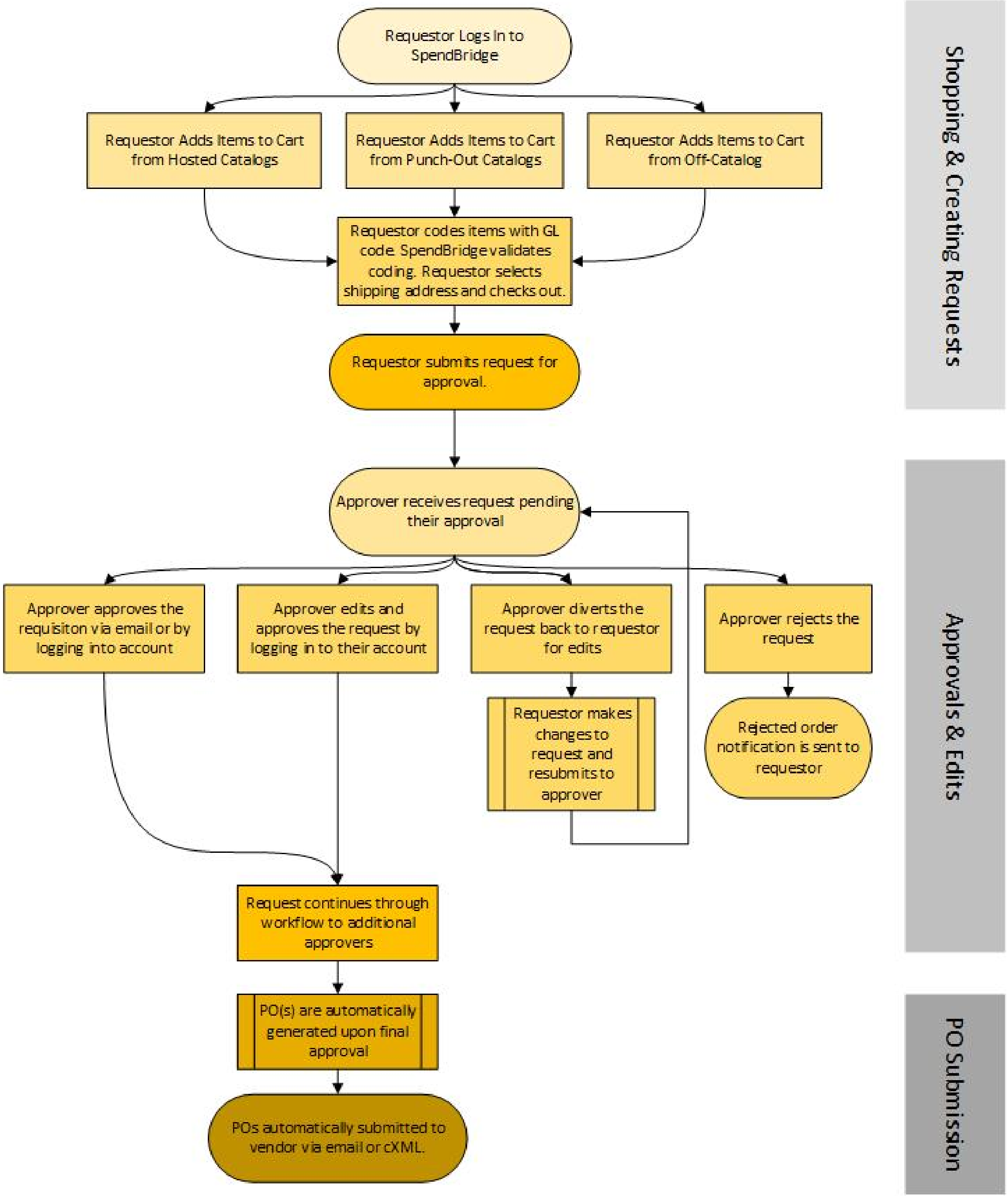
Users can create requests by shopping for items within SpendBridge and adding those items to their cart. Users can shop from:

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

SpendBridge

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.

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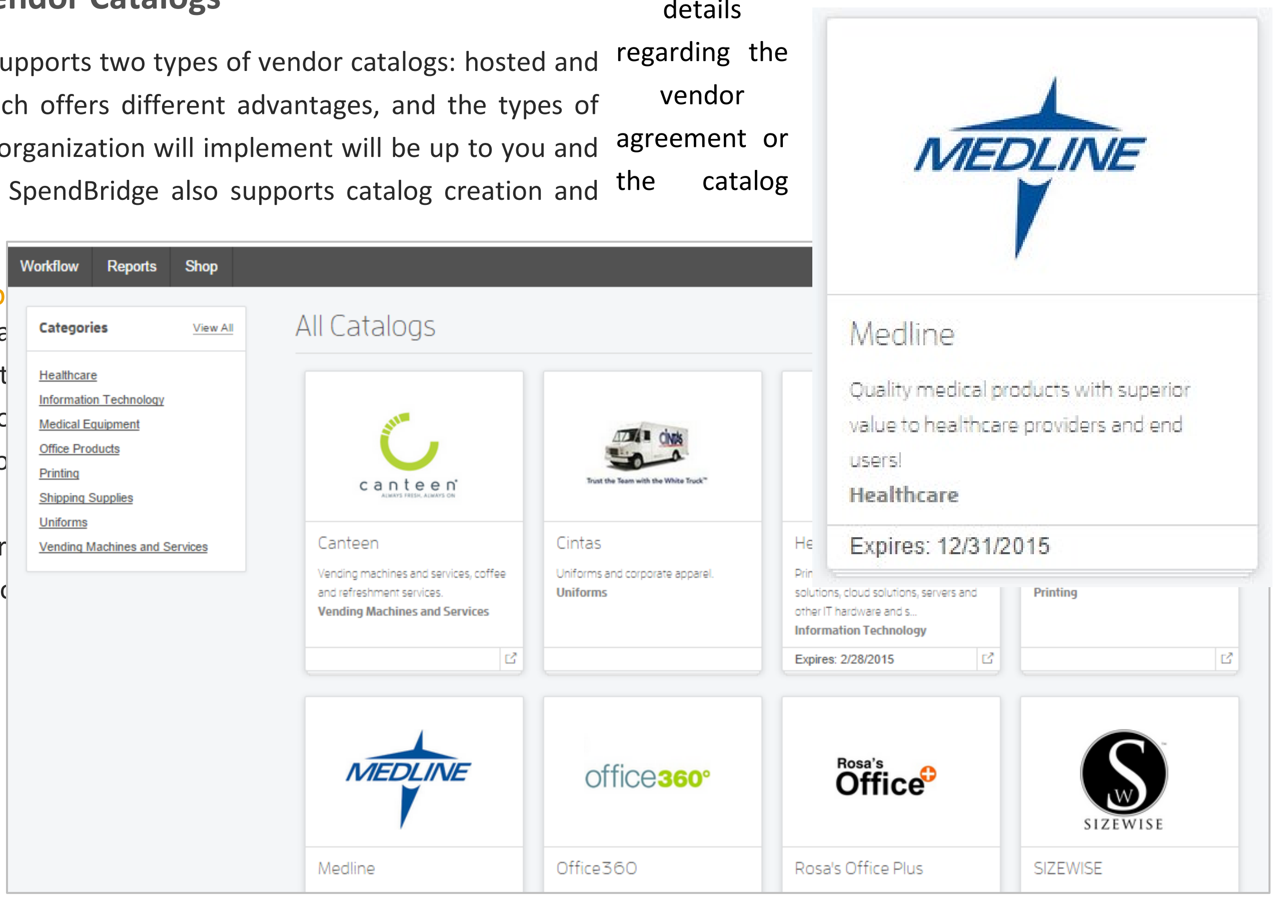


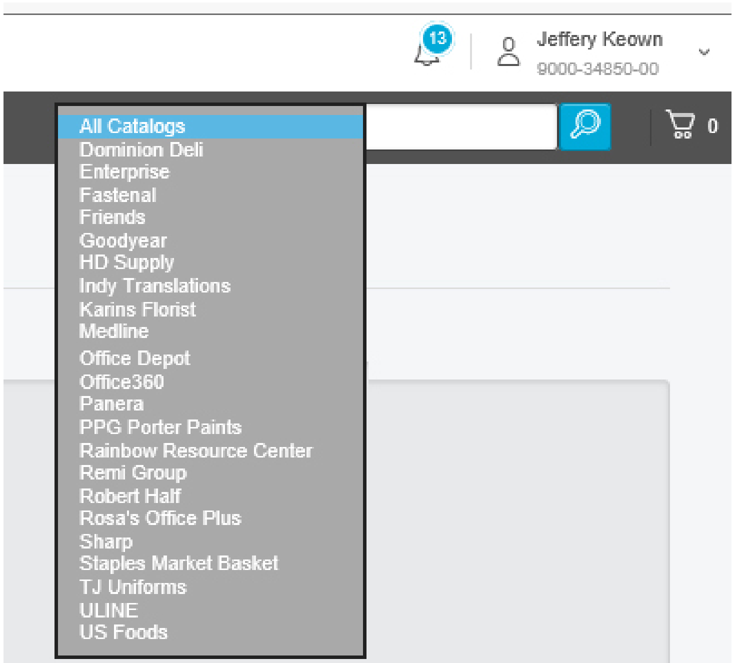
2 Creating Requests

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**.

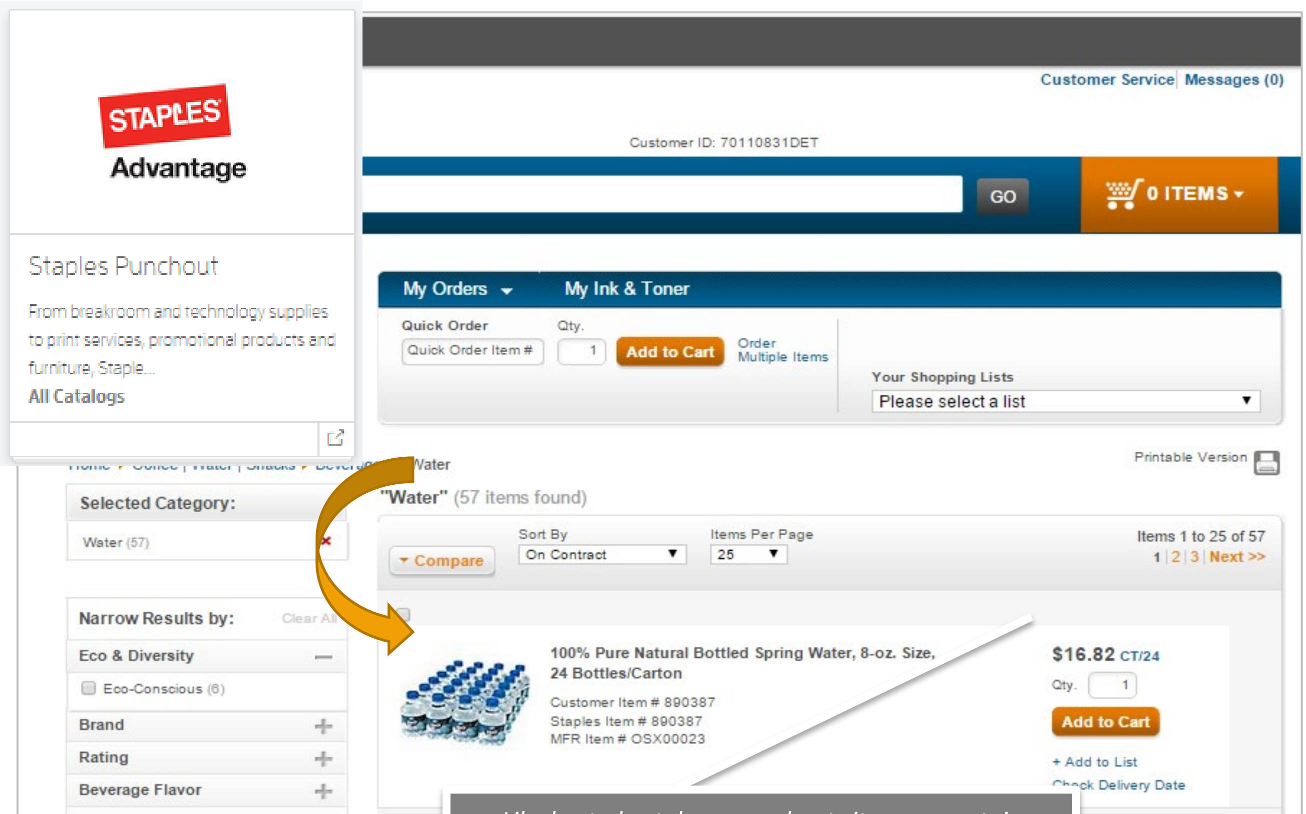
2.1 Shopping Catalogs

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 details regarding the vendor agreement or the catalog are found on the catalog cards.


13
Jeffery Keown
9000-34850-00
0
All Catalogs
Dominion Deli
Enterprise
Fastenal
Friends
Goodyear
HD Supply
Indy Translations
Karins Florist
Medline
Office Depot
Office360
Panera
PPG Porter Paints
Rainbow Resource Center
Remi Group
Robert Half
Rosa's Office Plus
Sharp
Staples Market Basket
TJ Uniforms
ULINE
US Foods

Punch-Out Catalogs



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

Indicated by the arrow icon at the ... catalog card, a punch-out catalog ... 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.

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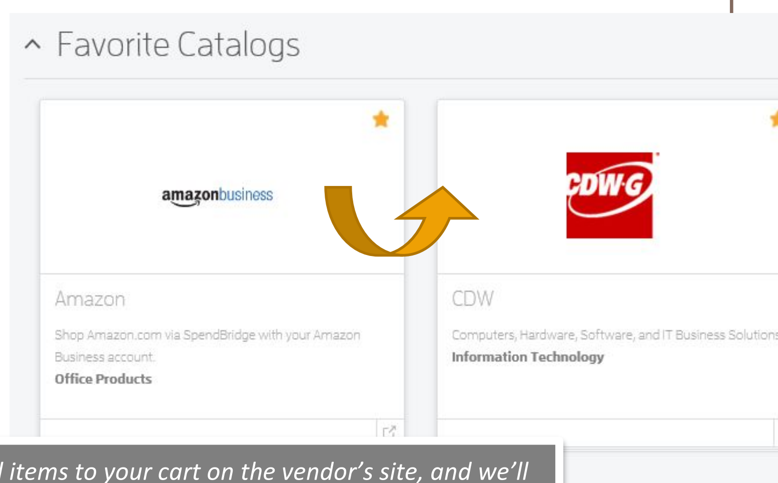
Whether it's a hosted or punch out catalog you can click the little star to make any catalog a Favorite. This will cause the catalog to rise to the top of the page the next time you load it.



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

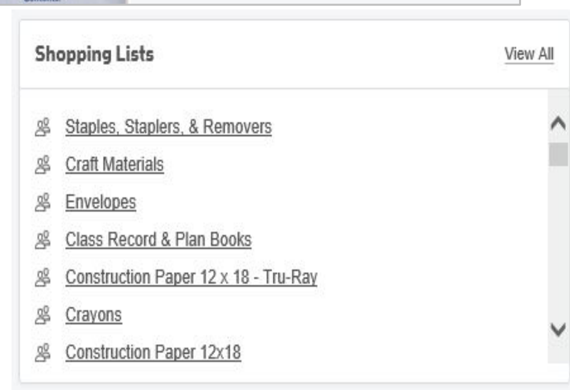
The "Shop Off-Catalog" feature allows users to generate requests for goods or services that are not in a catalog. To use the Shop Off-Catalog feature, navigate to it from your dashboard or the shop menu.

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.

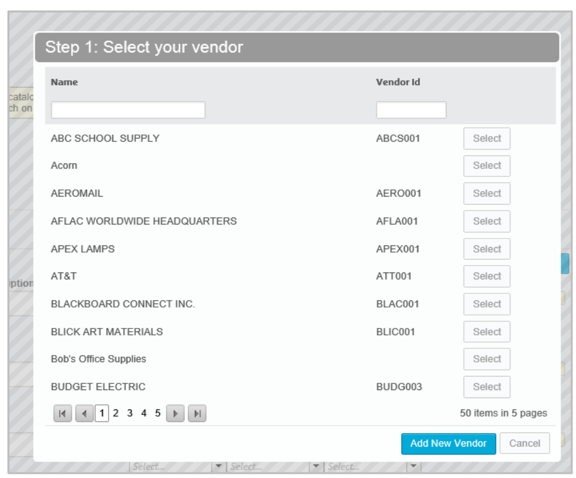


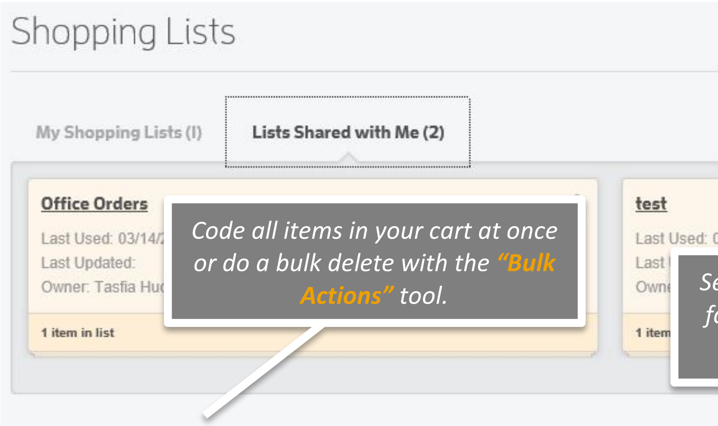
2.4 Shopping Lists

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.





Cart Controls

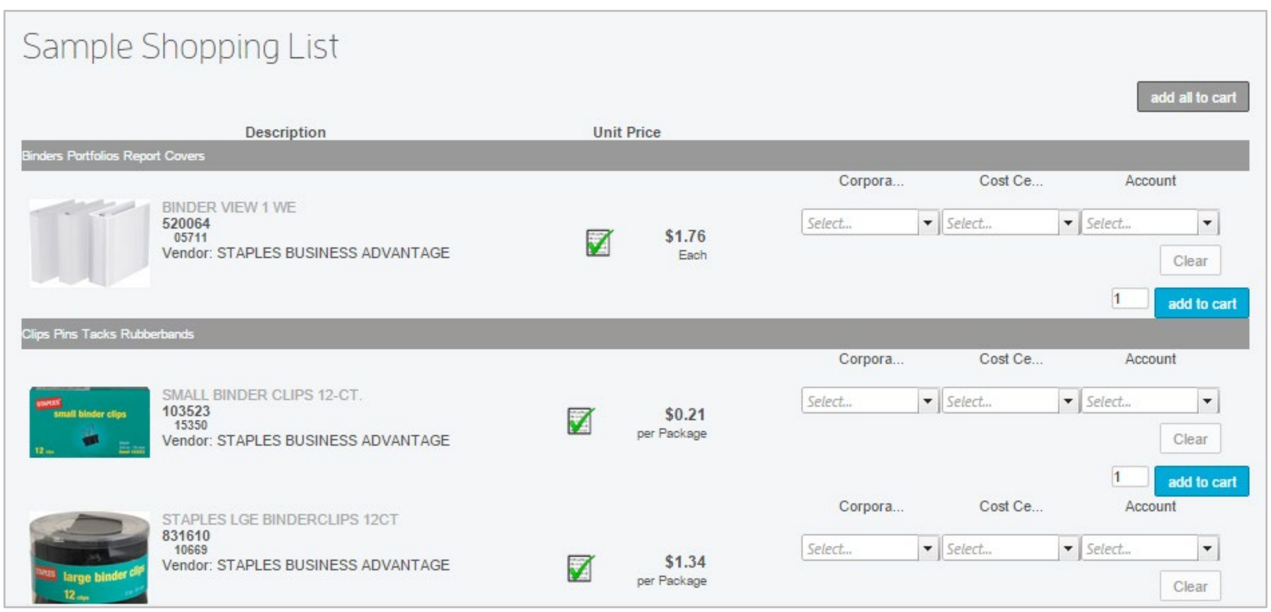
Once your items are in the cart, code your items with account code information, department information, or attach files to your request.

Managing Lists

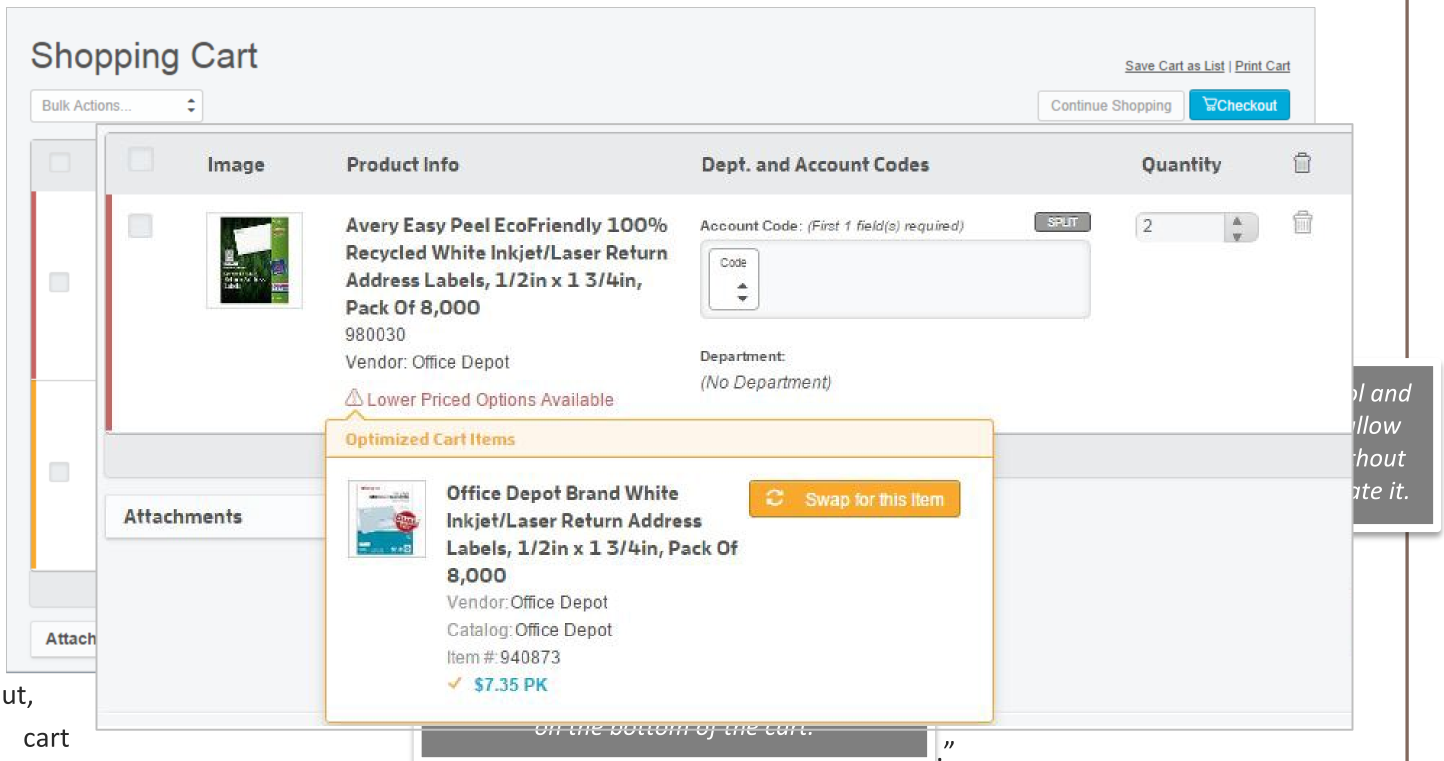
Once you've created a shopping list, you can continue to add items from your cart or search results to the list to customize it to your buying habits. You can also rename it, edit it, share it with others at your organization, or create more lists. Lists can be managed in this way from the **Shopping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



After 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 into SpendBridge (also called "Competing Vendors" or

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on the bottom of the cart.

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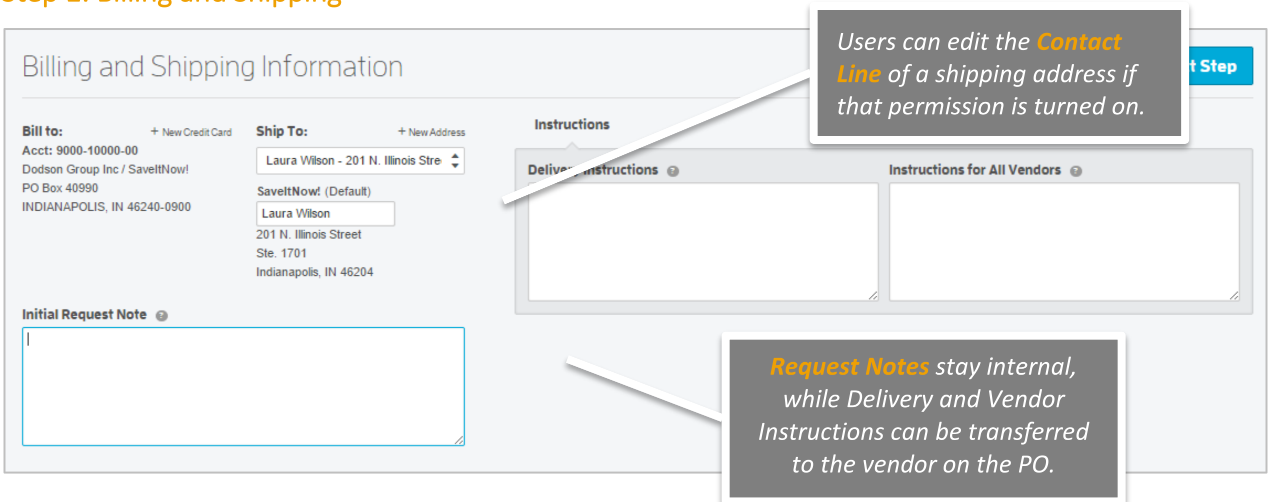
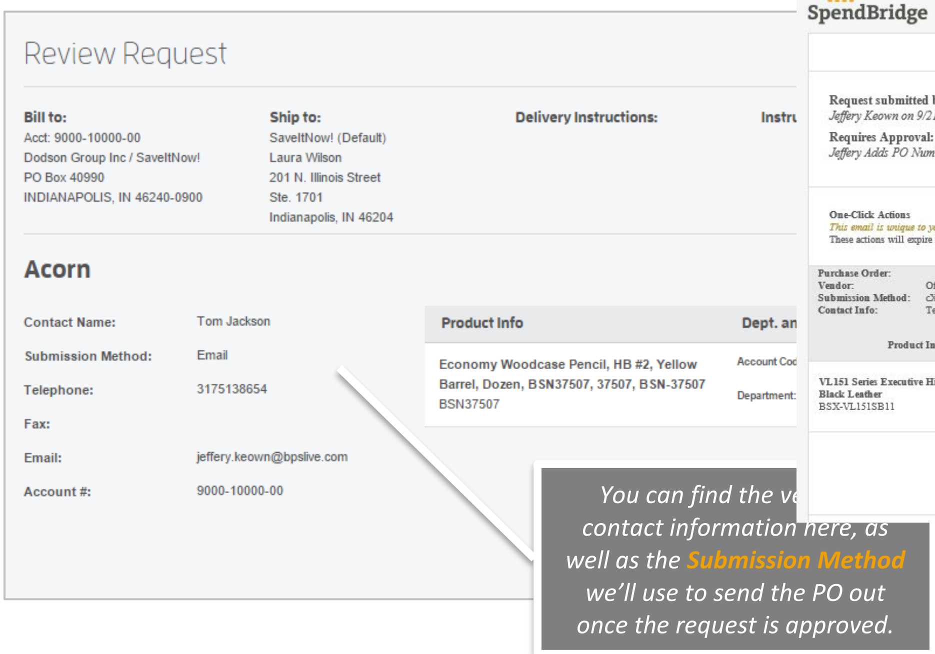
2.6 Checking Out

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



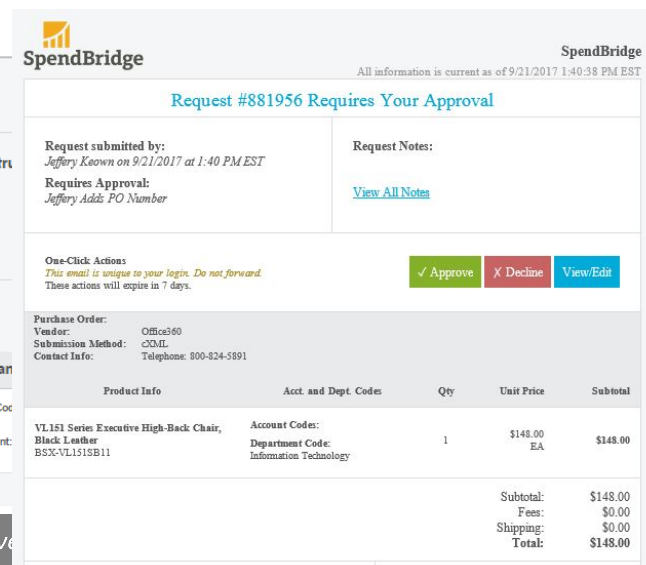
Step 2: Review Request



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.

3.1 Approval via Email



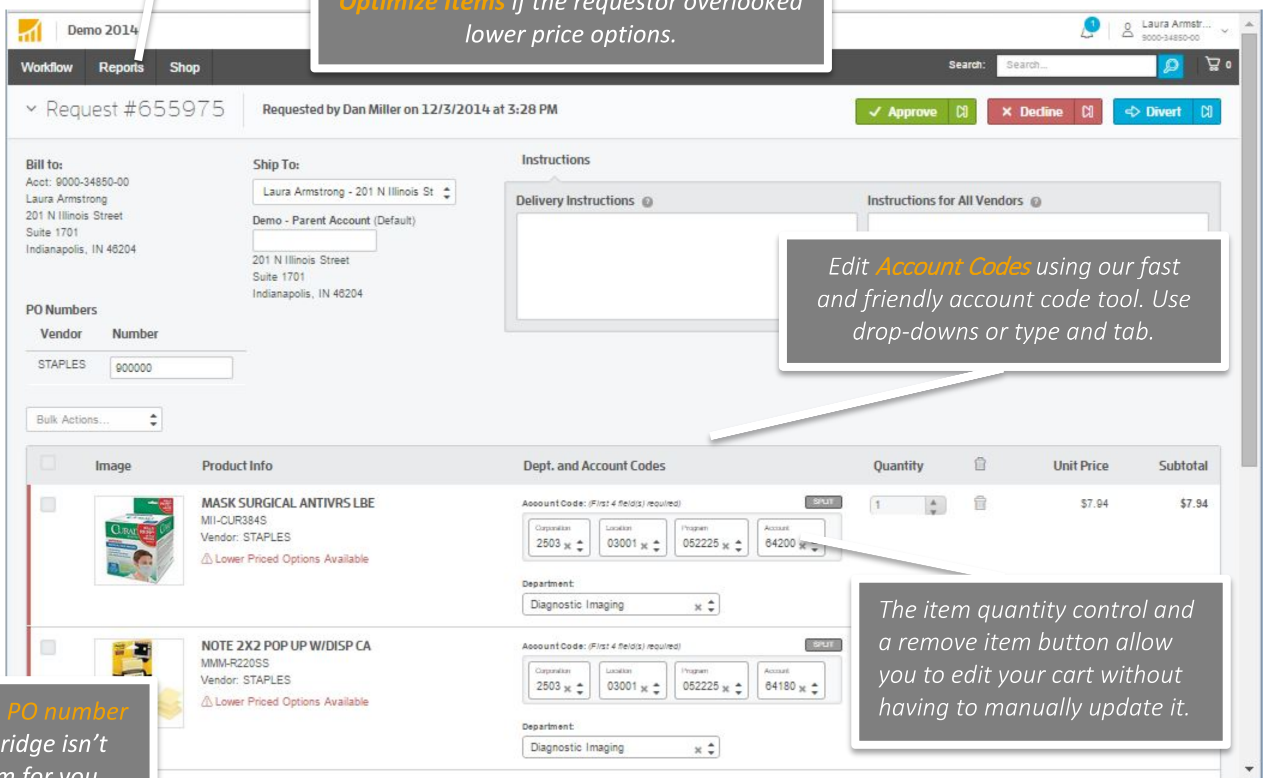
Approvers may approve uests via links within the notification email (right), which contains line item detail of the request. If the approver would like to edit or divert a request, they should login to the application using the "Review, Edit, or Optimize" link.

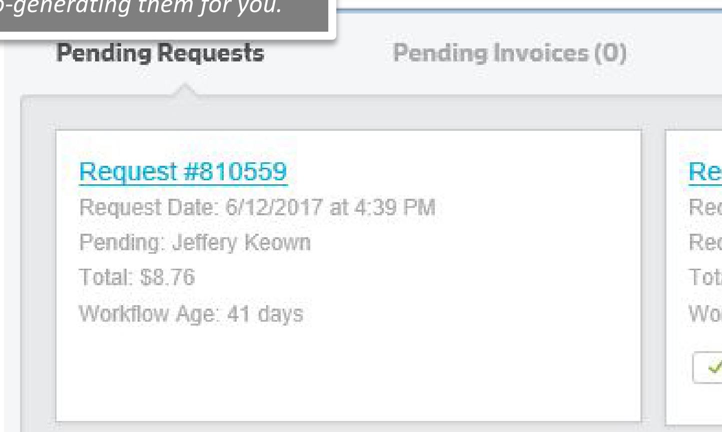
3.2 Approval in the Application

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

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 …m the details … page.





The Request Approval Page

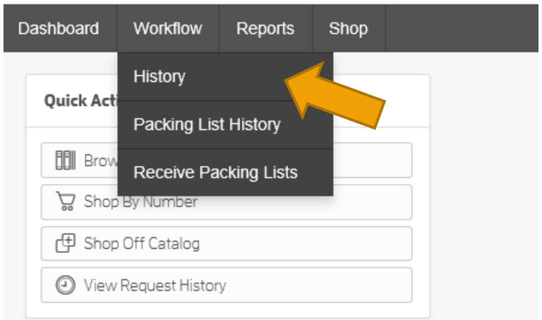
When an approver opens a request to edit, either from their approval notification email or via the dashboard request card, they can then use several tools to review and edit a request before they approve.

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.

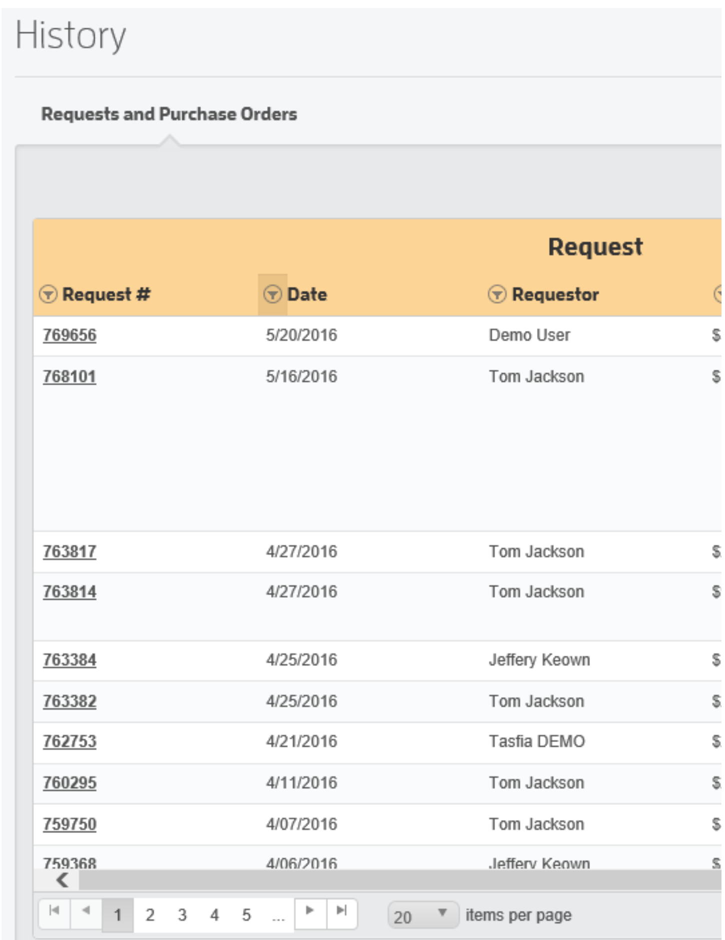
The "Approve and Next," "Decline and Next," and "Divert and Next" buttons allow approvers to quickly process requests and immediately open the next.

4 History

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



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.



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 S
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		

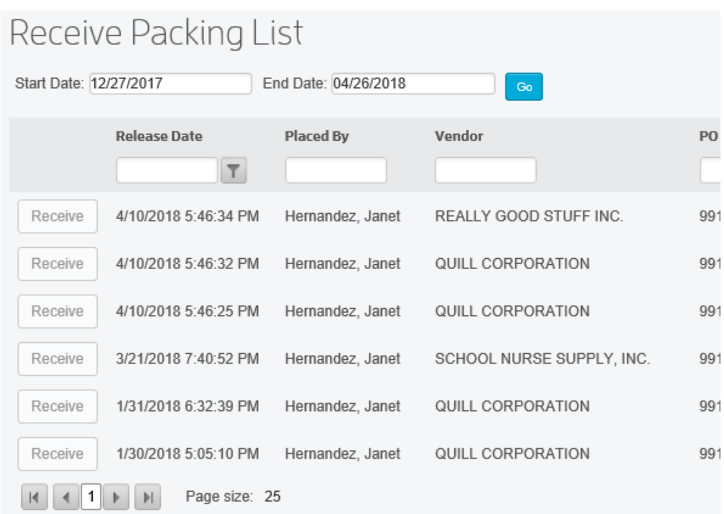
5 Receiving Module

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.



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

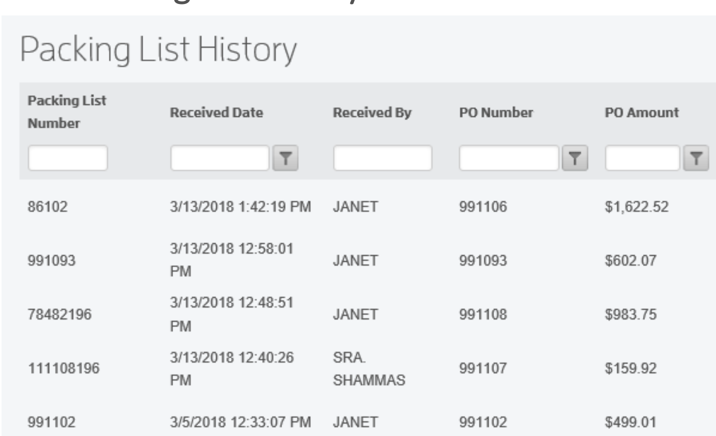
Entering Receiving Information

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

Item Number	Description	Quantity	Quantity Previously Received	Quantity Received
ZSR	Glide Air Transfer	1	0	0
TMB	Trapeze Free Stand	1	0	0
TGE/TIU	Bari Commode	1	0	0
SRT	Triflex 2 Trapeze	18	0	0
STO	Theraturn	1	0	0

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 Number	Received Date	Received By	PO Number	PO Amount
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

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.

6 Invoice Module

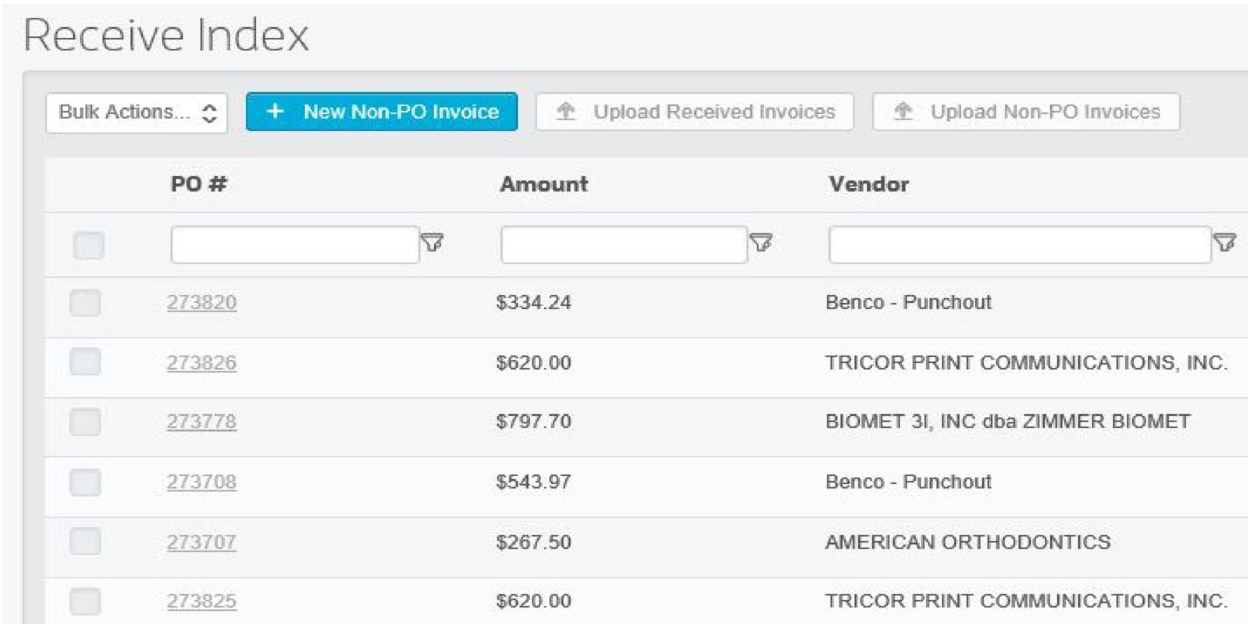
In addition to our purchasing and packing list modules, SpendBridge also offers clients tools to receive invoices in SpendBridge and route those invoices for approval and payment.

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 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.



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.

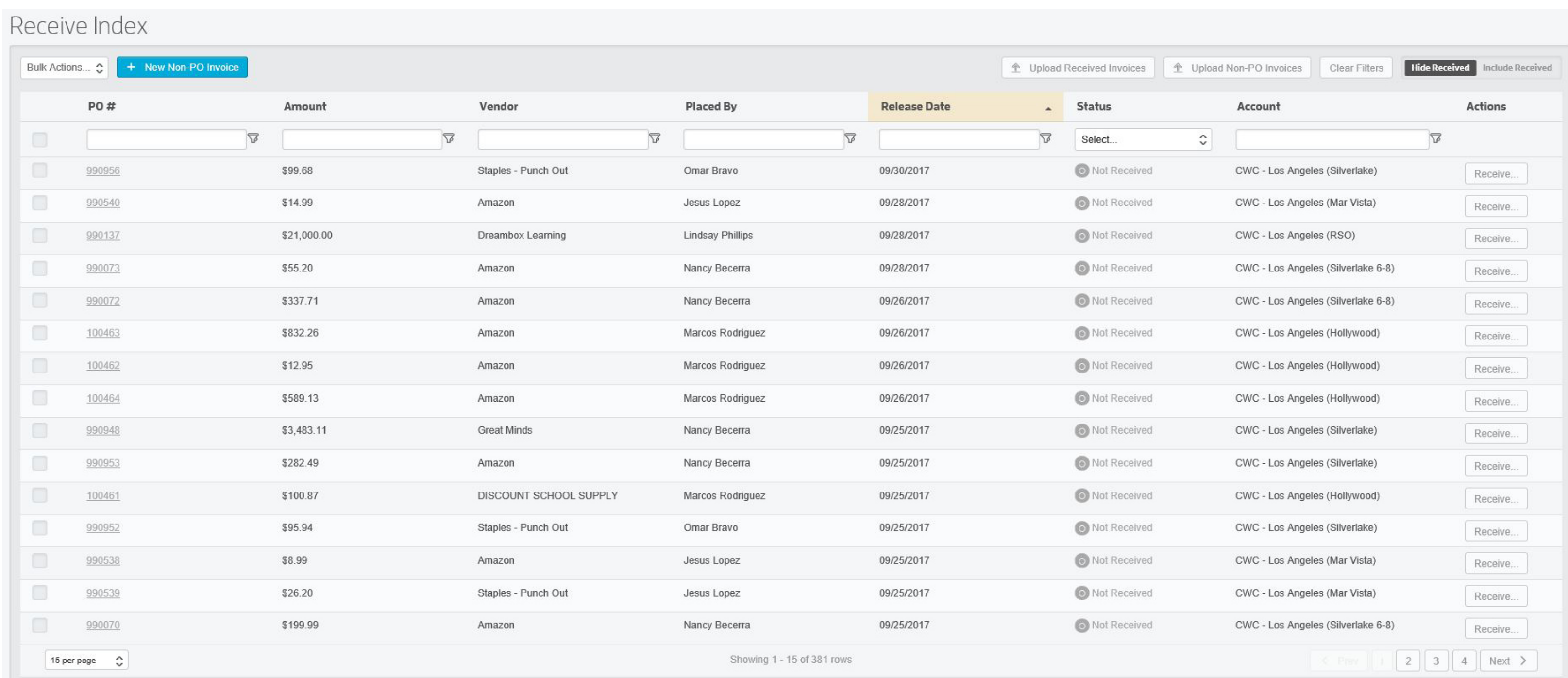
Placed By – This is the user who placed the Request. Filtering here isolates a given user.

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.

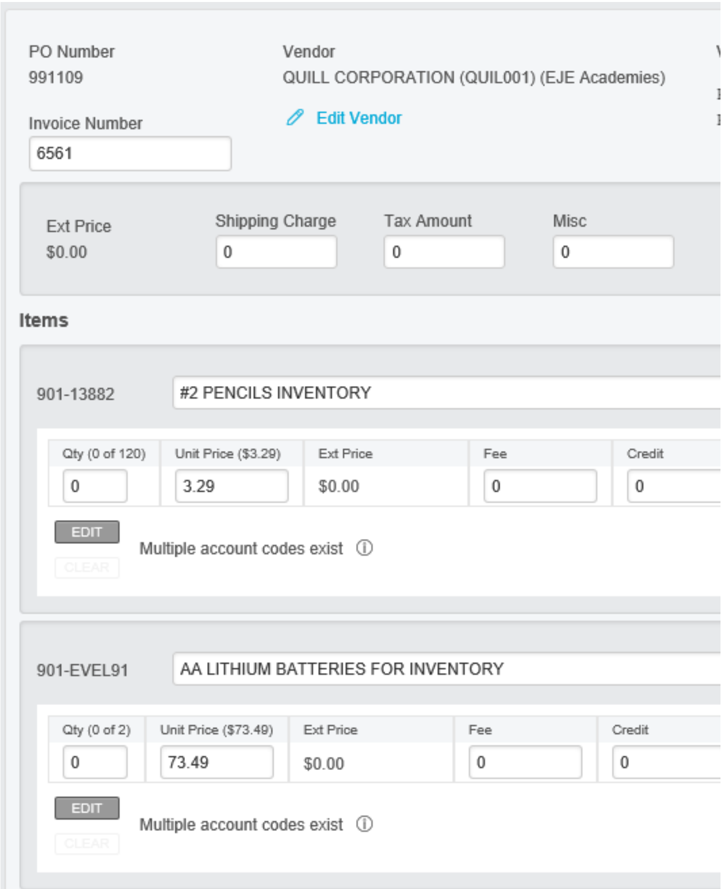


6.1.2 Batch Processing

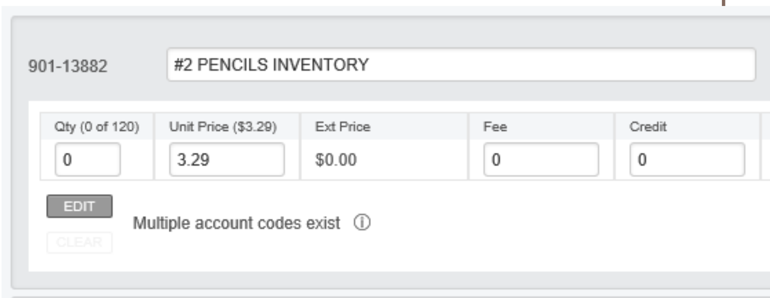
You can use the click-boxes on the left to select multiple invoices. As you process each one, you can flip to the next one with the Next button, or have it flip automatically when you submit each one.

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.



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.



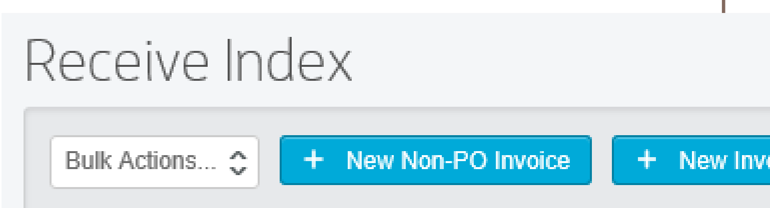
6.1.4 Upload Received Invoices

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.

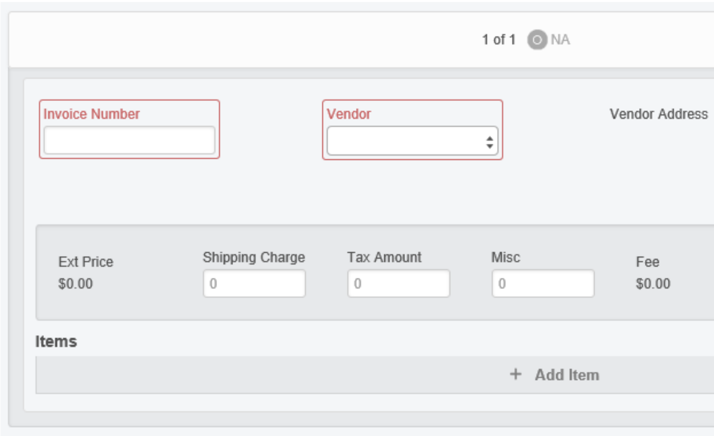
6.1.5 Receiving a Non-PO Invoice

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.”



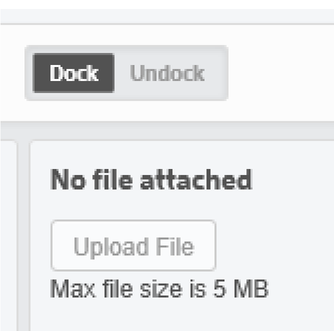
Enter the Invoice Number, grab a Vendor from the drop down (all of your Vendors are loaded into this field) fill in the Invoice Issue Date, and the optional Due Date. Any changes you make are recorded in the “Changes” area at the bottom of the page.



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.

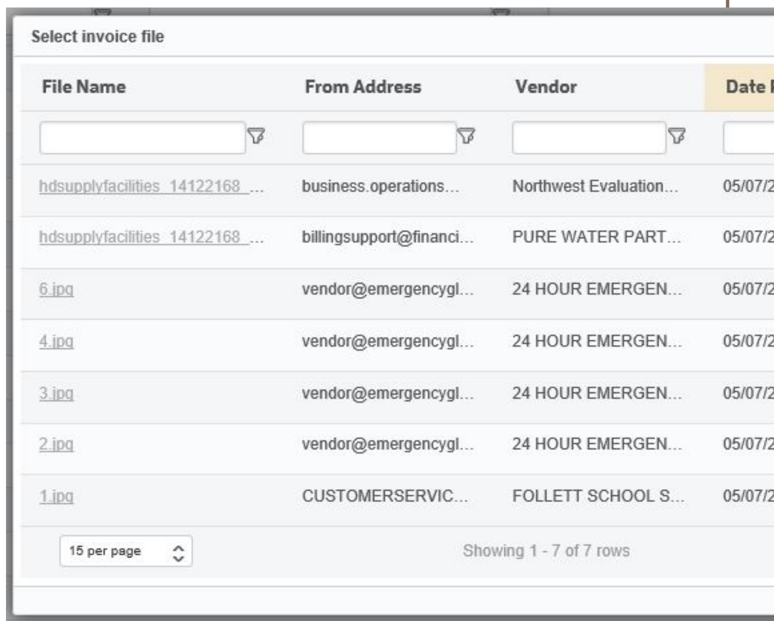


Add Items and Attachments

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:

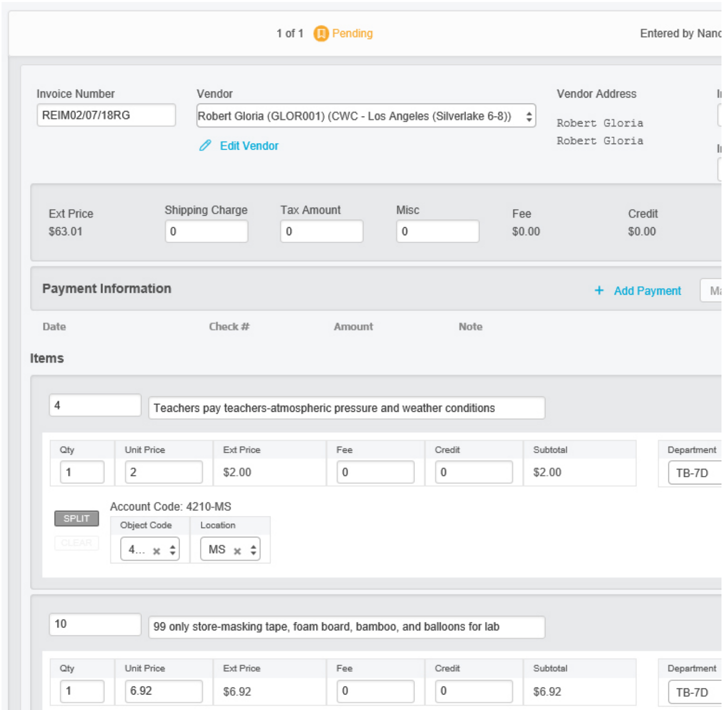


Once matched up, they are received like any other invoice.

6.3 Invoice Approval

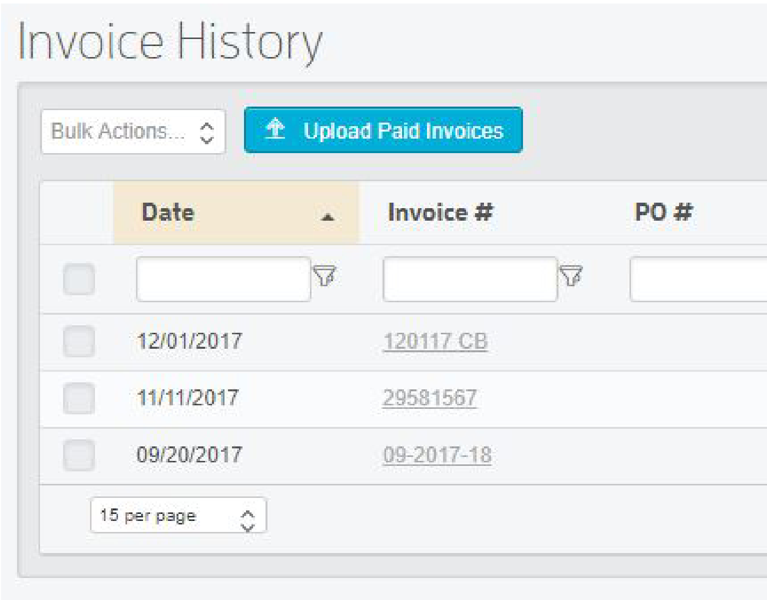
Once an invoice has been received, it is automatically routed through invoice Approval Workflow. Similar to requests, invoices may be approved via email or in the application, depending on permissions.

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


1 of 1 Pending
Entered by Nanc
Invoice Number
REIM02/07/18RG
Vendor
Robert Gloria (GLOR001) (CWC - Los Angeles (Silverlake 6-8))
Edit Vendor
Vendor Address
Robert Gloria
Robert Gloria
Ext Price
$63.01
Shipping Charge
0
Tax Amount
0
Misc
0
Fee
$0.00
Credit
$0.00
Payment Information
Add Payment
Date
Check #
Amount
Note
Items
4
Teachers pay teachers-atmospheric pressure and weather conditions
Qty
1
Unit Price
2
Ext Price
$2.00
Fee
0
Credit
0
Subtotal
$2.00
Department
TB-7D
Account Code: 4210-MS
SPLIT
Object Code
4...
Location
MS
10
99 only store-masking tape, foam board, bamboo, and balloons for lab
Qty
1
Unit Price
6.92
Ext Price
$6.92
Fee
0
Credit
0
Subtotal
$6.92
Department
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?

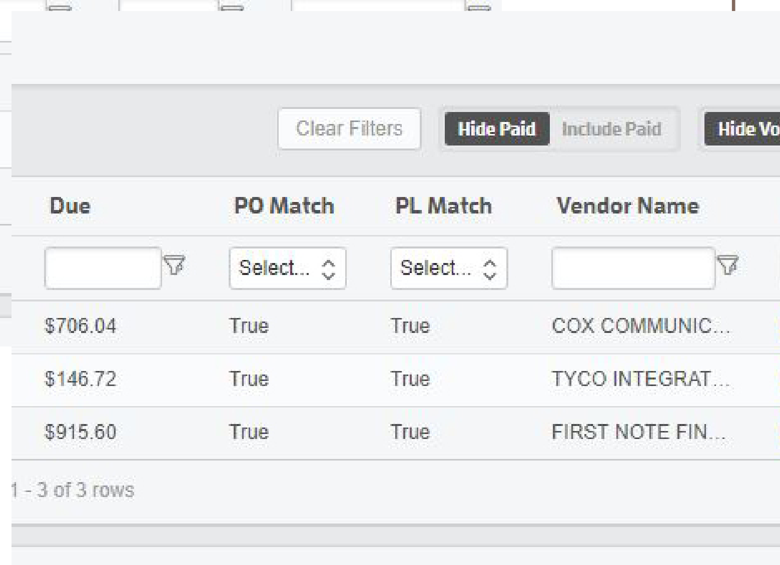
PO Match – Do the Invoice received quantities match the PO? This column is TRUE or FALSE to show you.

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.

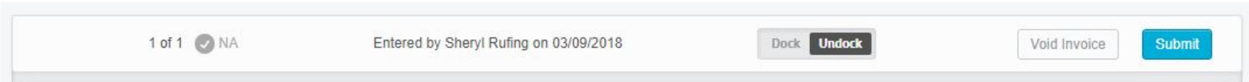
Account – If you have multiple Child Accounts, you’ll see which one of them generated the Invoice.



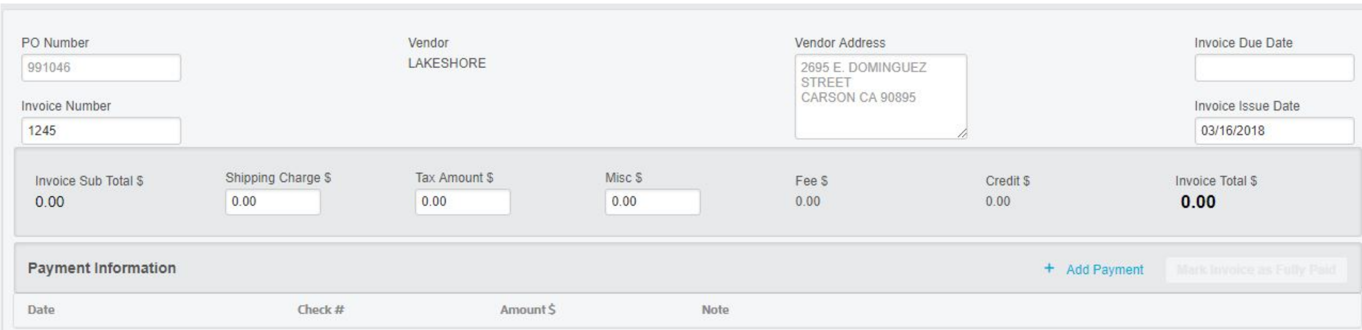
… and the right half of the Invoice History page.

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.

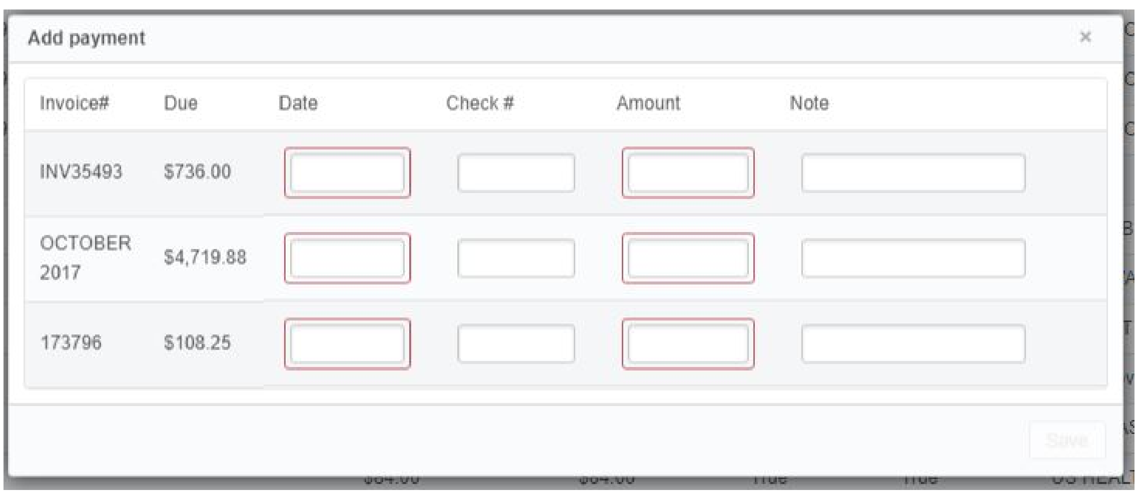


This page works much like the Receive Invoice page, but allows you to make changes if you are authorized.



6.6 Paying Invoices

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

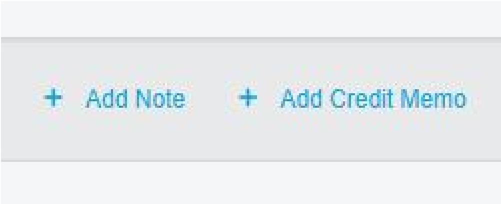


With it, you'll add the **Date**, **Check #, Amount**, and any notes you feel relevant to the payment. Once these are entered, hit Save to return to Invoice History.

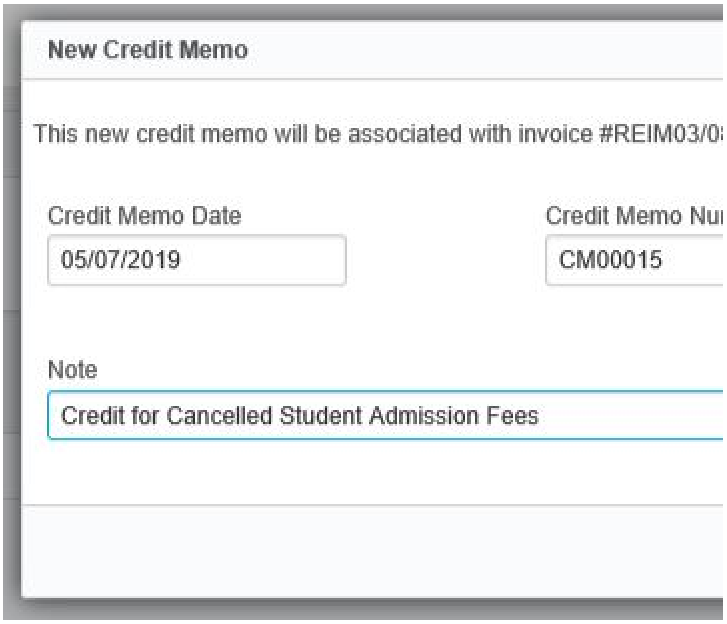
7 Credit Memos

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.

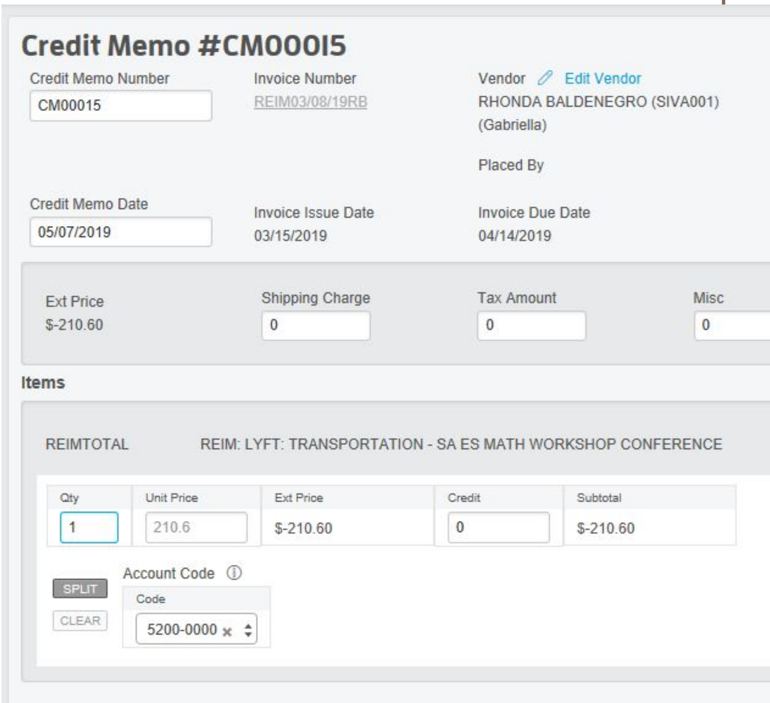
Just above the Notes section, you'll see a Credit Memo link.



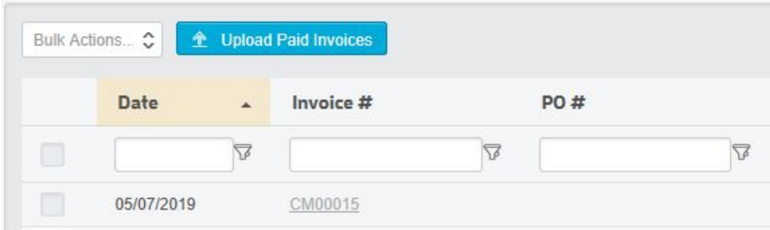
Clicking this link takes you to the Create Credit Memo Pop-up.



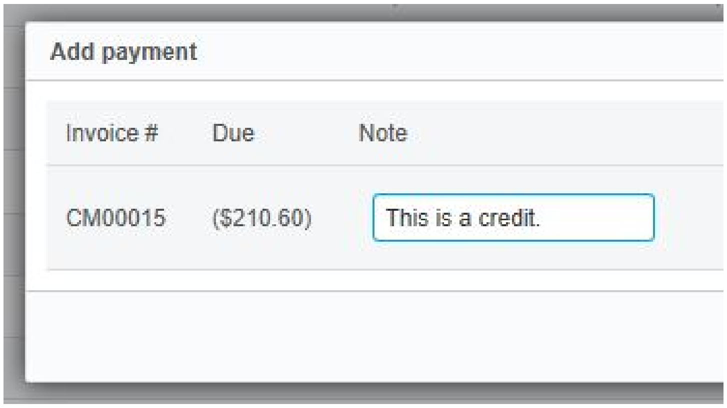
From here, you can enter the issue date, the Credit Memo Number and a note for anyone who accesses the document. When you hit create, you are taken to a specialized copy of your invoice.



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.

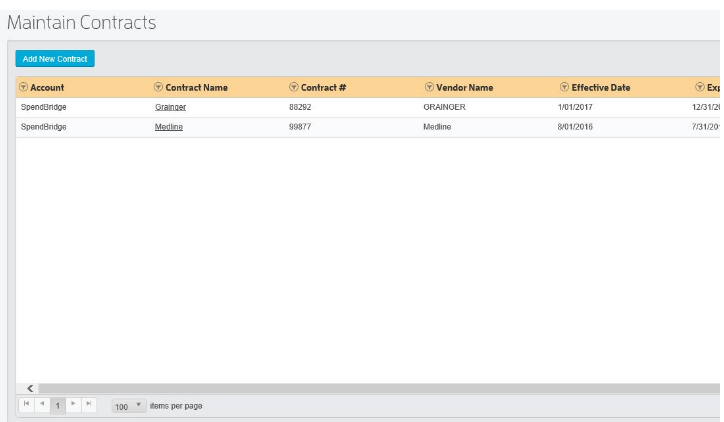

Add payment
Invoice #
Due
Note
CM00015
($210.60)
This is a credit.

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.



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

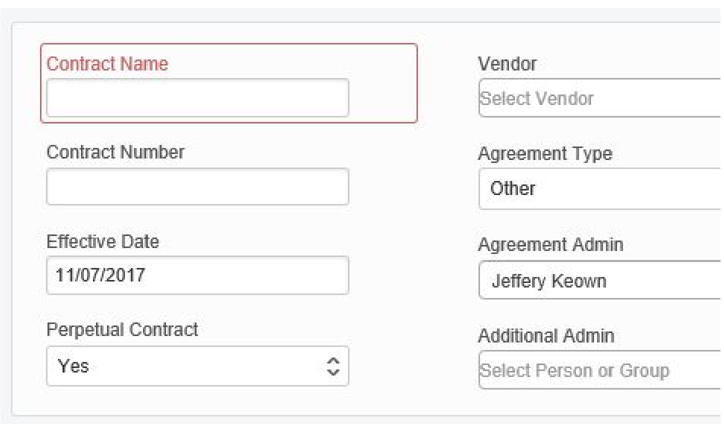
Contract Name and Vendor are required for Item Price Contracts. When you bring items from punch out an Item Price contract will intercept it, correct the price and alert you to the price discrepancy.

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.



8.3 Other Contract Attributes

Contract Name

This is the Name of the Contract, try to use an easy-to-recall, 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 dateis 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 cares 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

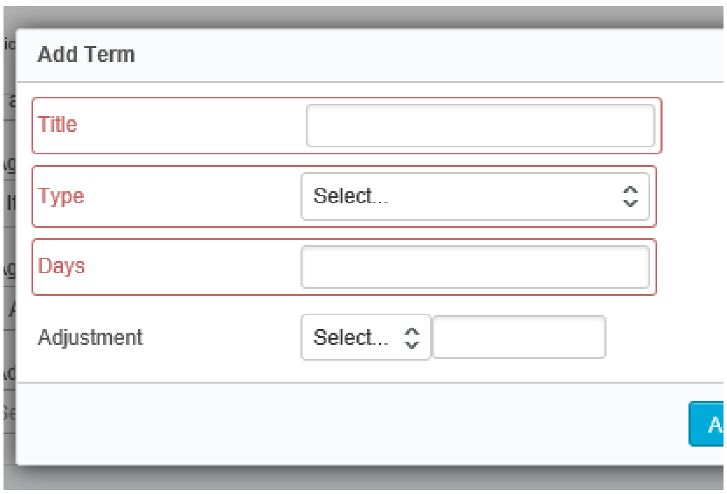
This is a reminder field that reminds the admin of maximum dollar amounts under the contract's entire active period. It does not constrain purchasing.

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.

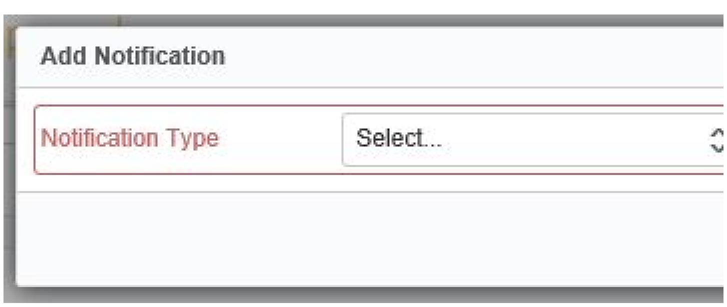


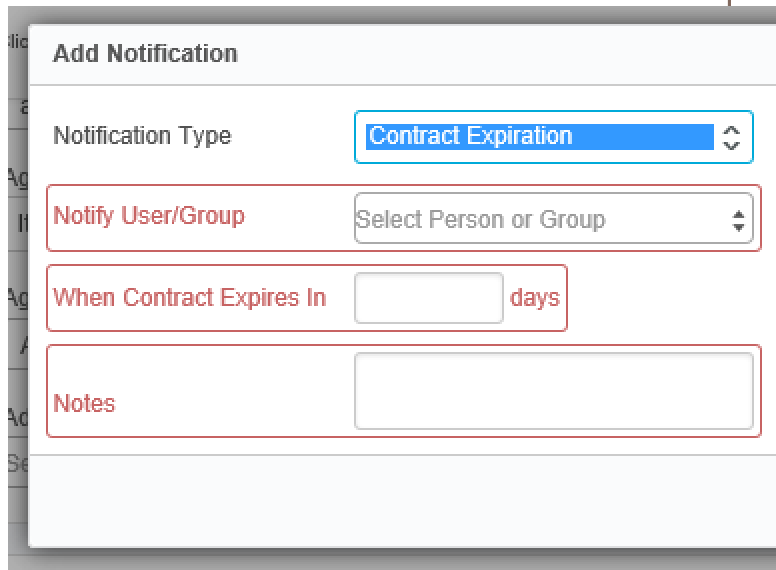
Contract Prices

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

Notifications

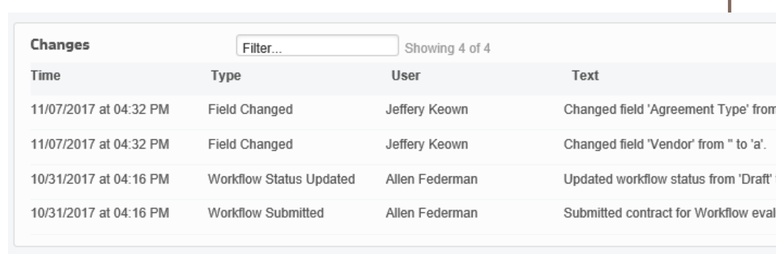
You can set an Expiration Warning and alerts in this area. How much time do you need to renew or research a new contract? This section will allow you to get an email in advance.





Changes

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



8.4 Uploading Contract Items

8.4.1 With your Catalog Upload

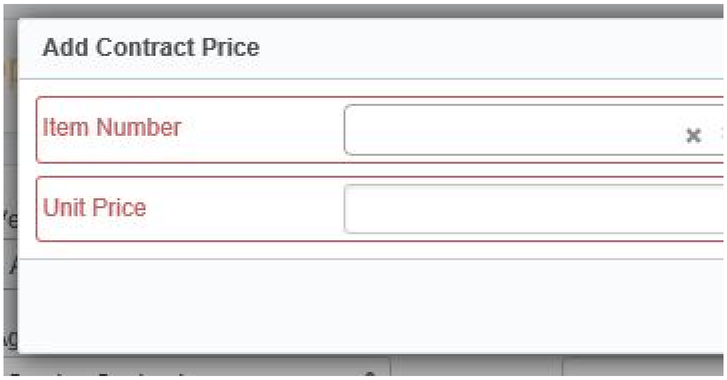
Adding items to a contract is very similar to adding items to a catalog. If you include the Contract Number on your Catalog Upload, the items will be added to the contract as the catalog upload processes. You may either add items to a contract individually or as an Excel upload.

8.4.2 Directly to your Contract

Find the Contract Item Number Price Upload template on the bottom on 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	Contr
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
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.

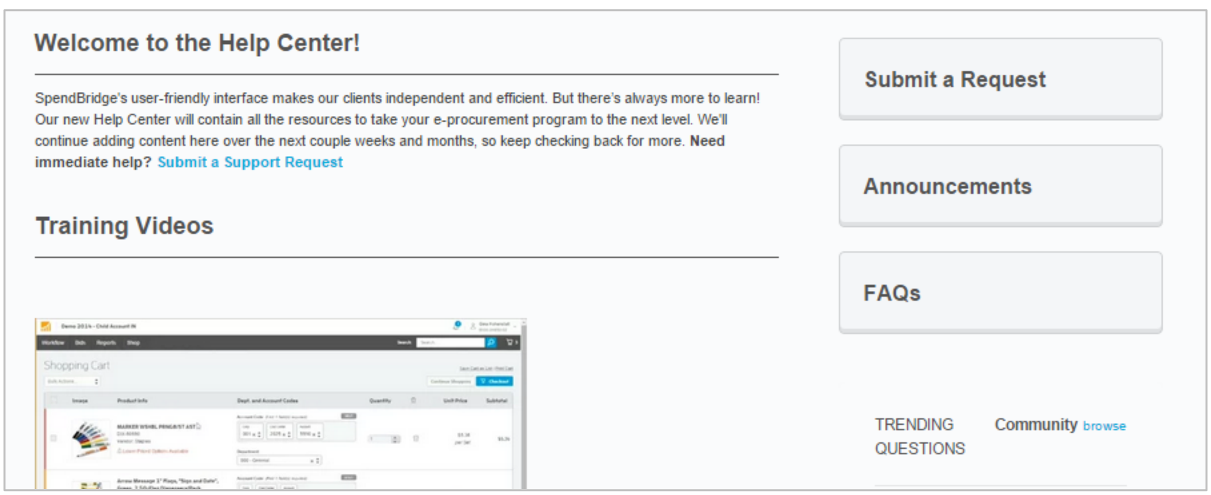
Additional reports may be available depending on the modules you utilize and your permissions. Check out reports by navigating to the Reports menu, or contact SpendBridge for support.

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

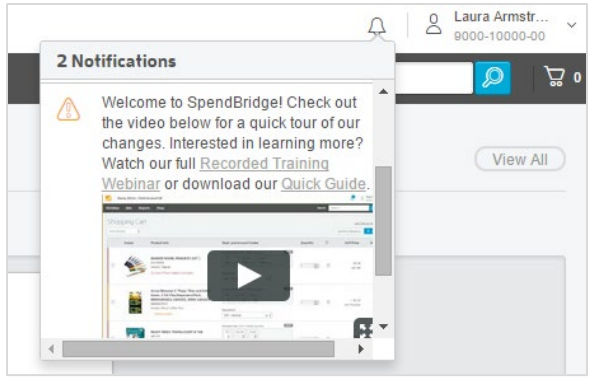


appropriate, such as when new tools or features are released.

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 coming soon!) and create support tickets which are submitted to our support team at support@spendbridge.com.

Users can also request support by simply emailing or calling us. Our support team is available Monday to Friday, 8 a.m. to 5 p.m. EST.



support@spendbridge.co
1.877.208.4817