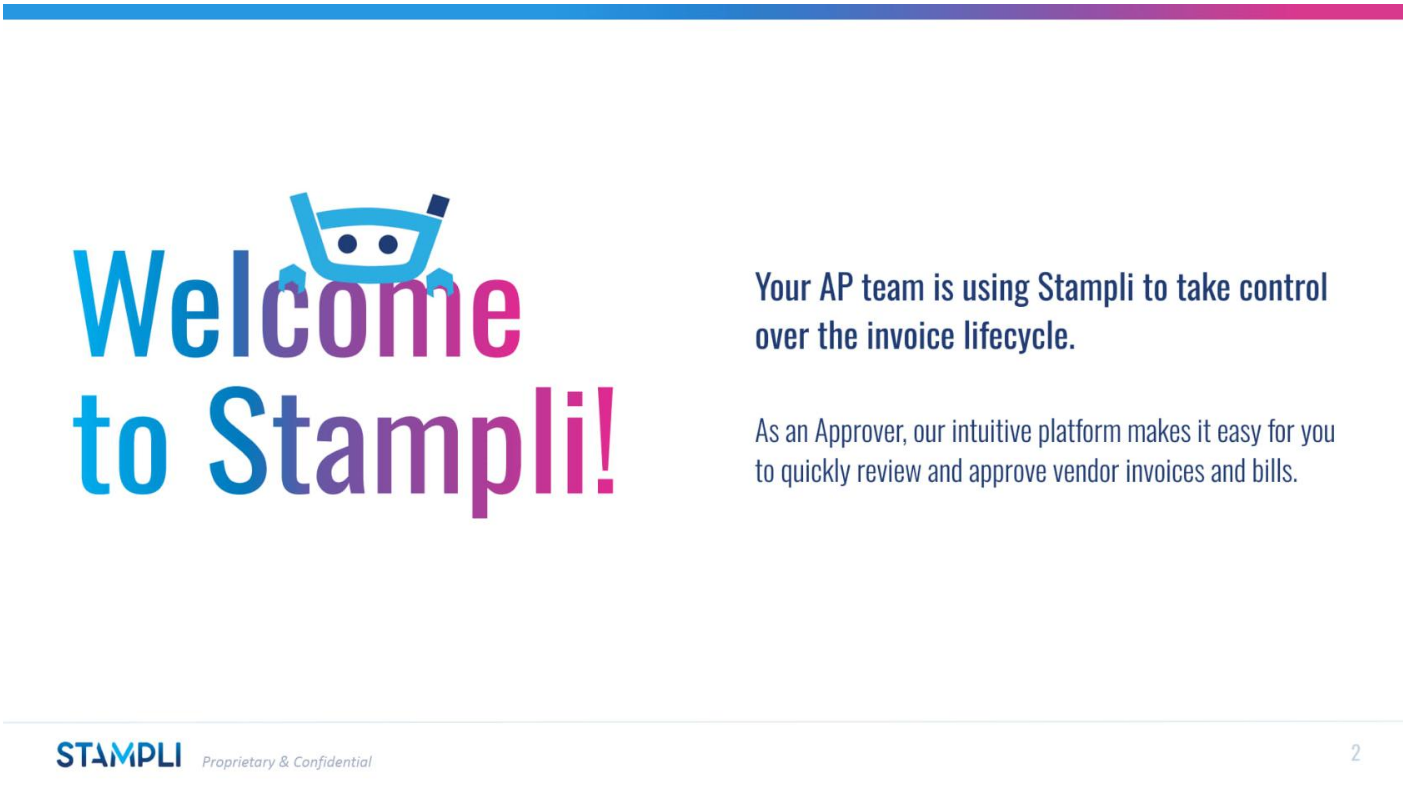
Approver Guide w/o Coding



Sign Up for Stampli

If you already have a Stampli account, go to Page 7.

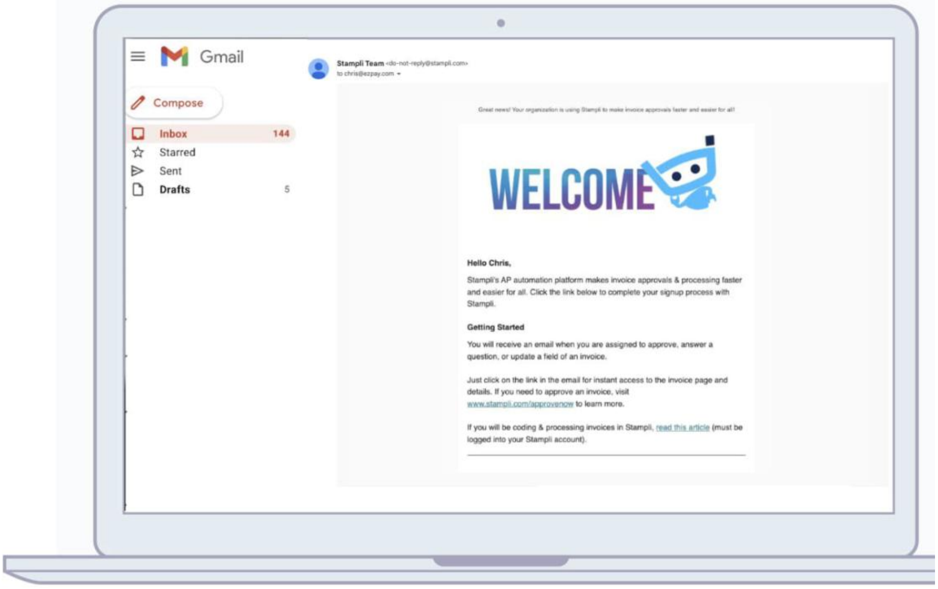
1.

Welcome Email

You will receive a **Welcome to Stampli** email.

Go to the bottom of the email and note your Customer ID, Email, and Temporary Password.

Click on **Take Me to Stampli**.



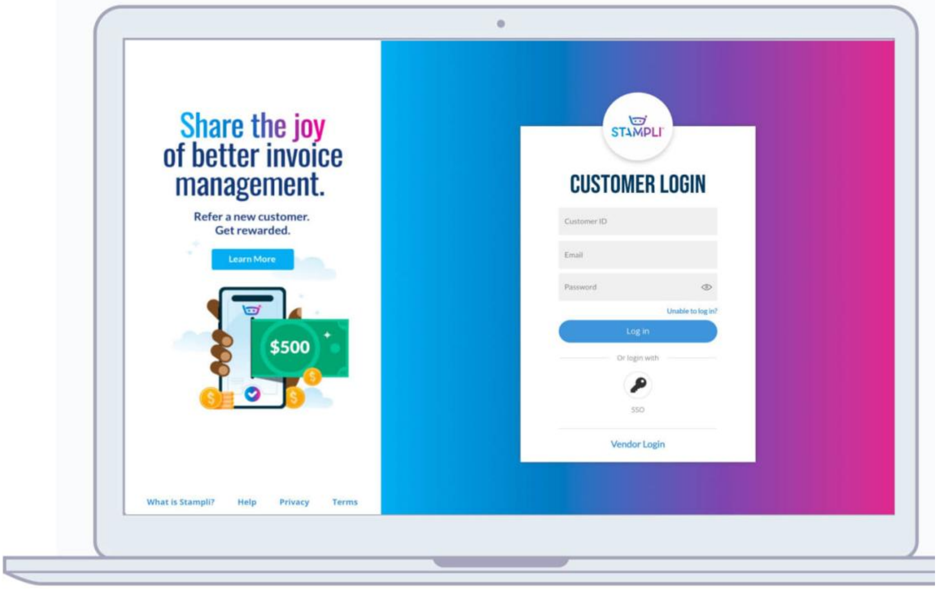
2.

Login + Create Password

In the login page, verify the **Customer ID** and **Email address** with the Welcome email.

Enter the temporary password provided in the email.

Click **Log In**. You will be prompted to create a new password.



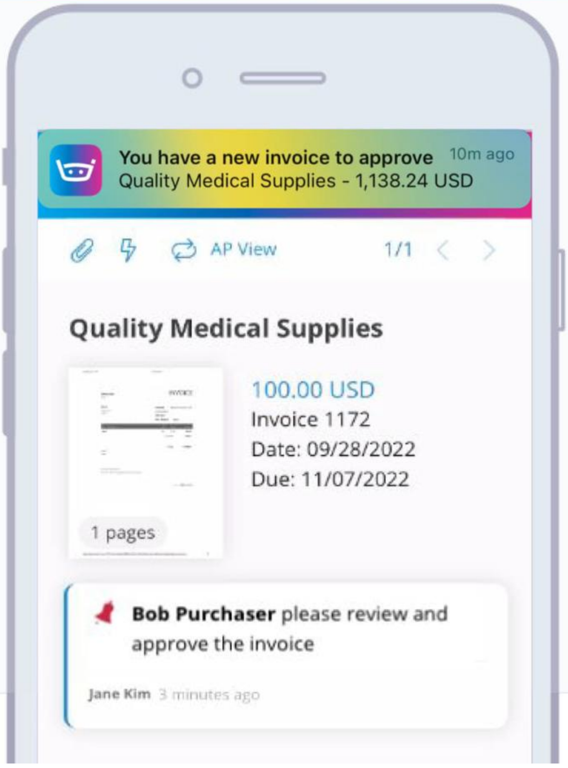
Approval Request

When AP needs your approval on an invoice, you will receive an **email** or **push notification**

GET IT ON Google Play

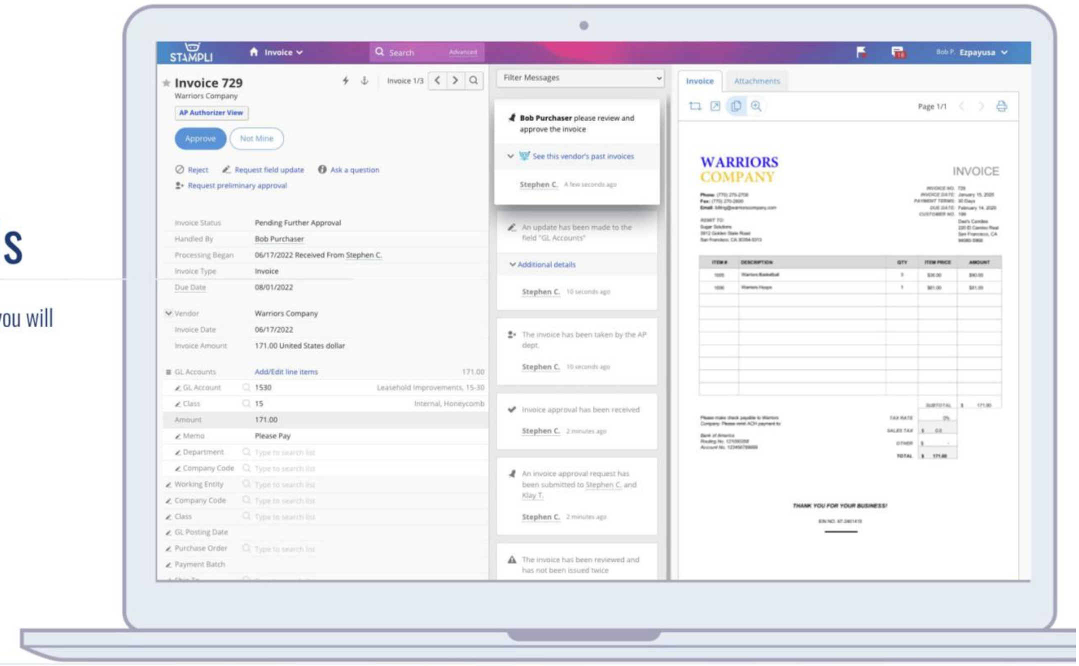
Download on the App Store

Tip: download the Stampli mobile app and approve invoices while on the go



Invoice Details

When you click on the email link, you will see the **Invoice Details** page.



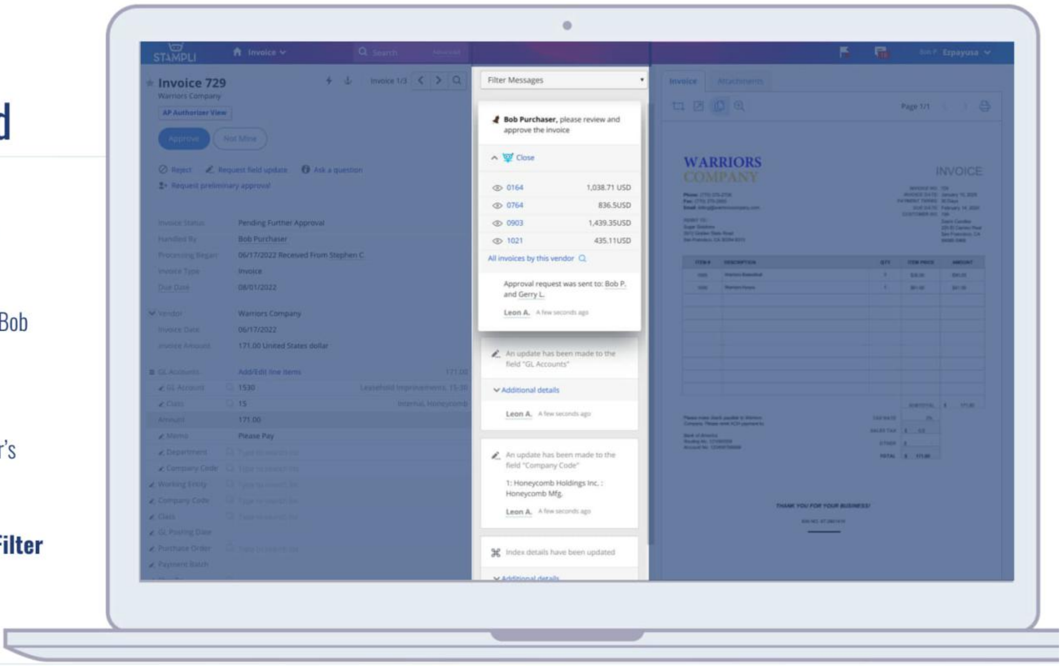
Conversation Feed

A feed of all communications and activities for the invoice is available.

The most recent activity is shown at the top. Here you see that Bob received an approval request from Jeanney.

Additionally, you can view the vendor's past bills.

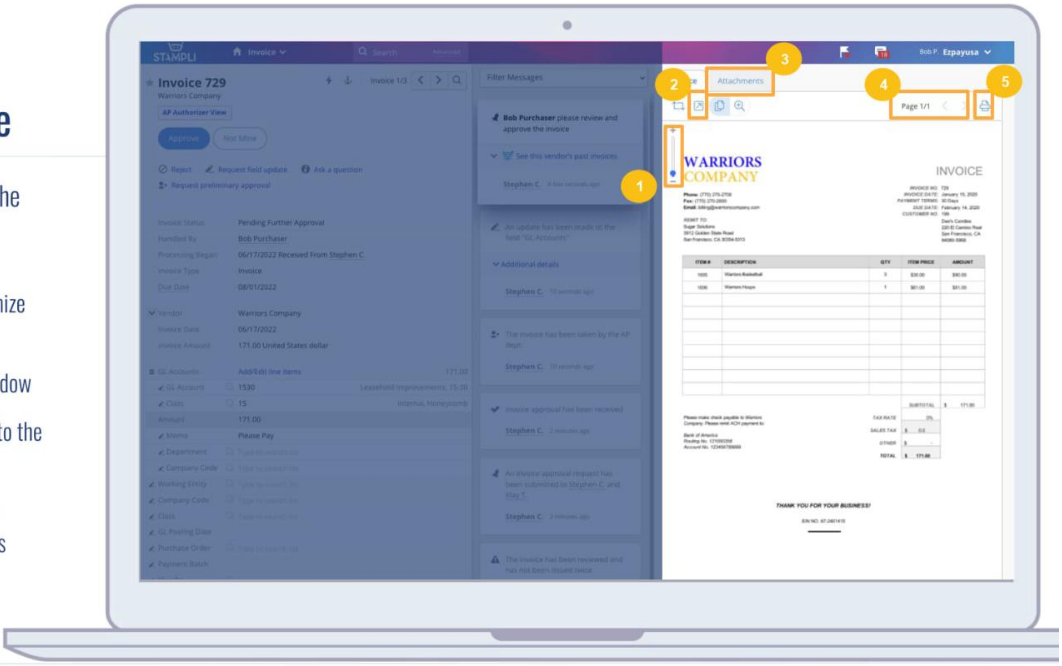
To view only specific activities, use **Filter Messages**.



Viewing the Invoice

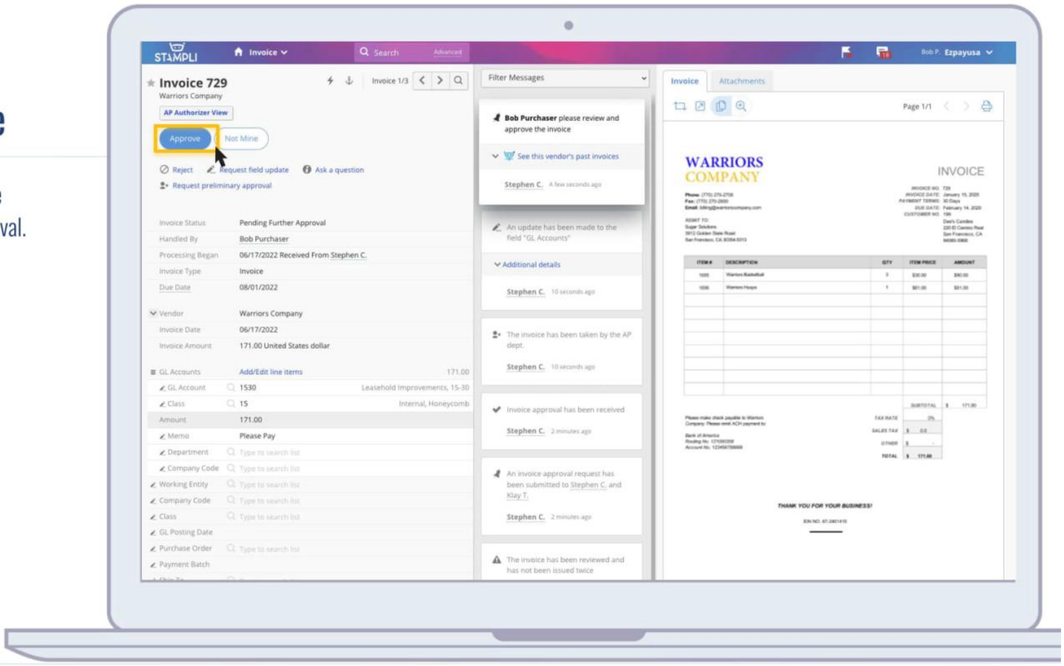
A copy of the invoice PDF is on the right side.

1. Use slider to enlarge or minimize invoice image
2. Open the invoice in a new window
3. View all attachments related to the invoice
4. View other pages if there are multiple pages or attachments
5. Print the invoice



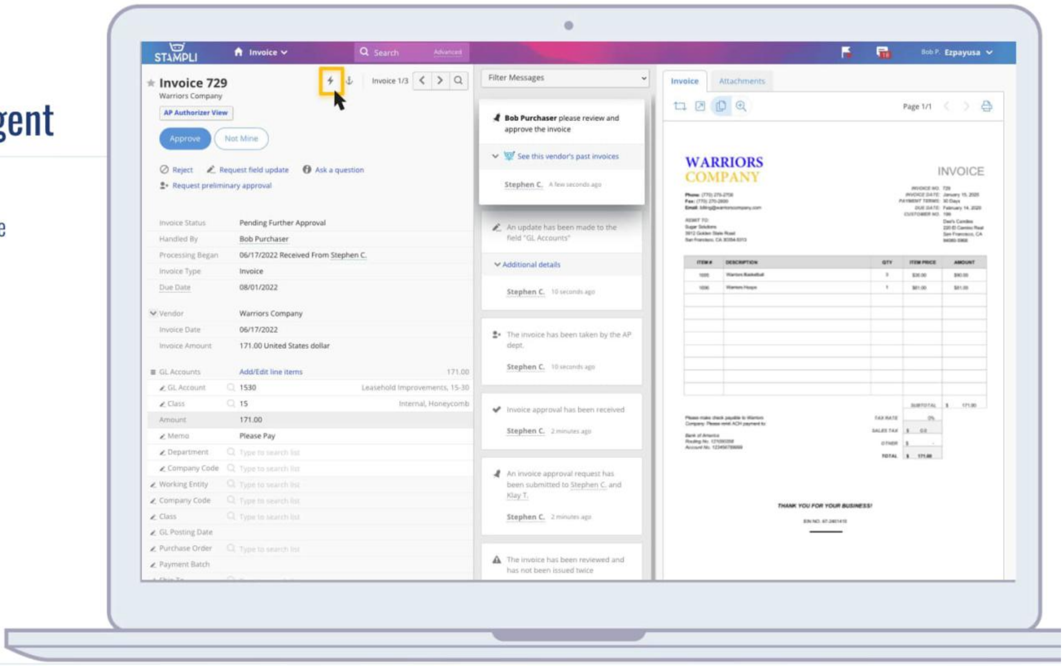
Approve the Invoice

After reviewing the invoice, click the **Approve** button to send your approval.



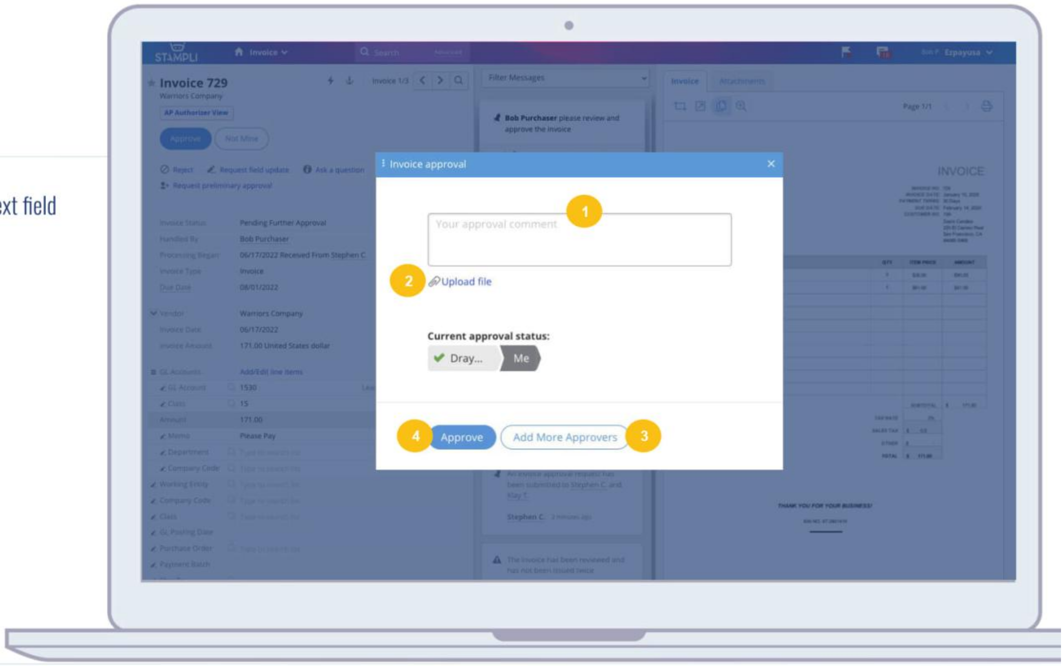
Mark Invoice as Urgent

If the invoice is urgent, click the **Lightning Bolt** to mark the invoice as urgent.



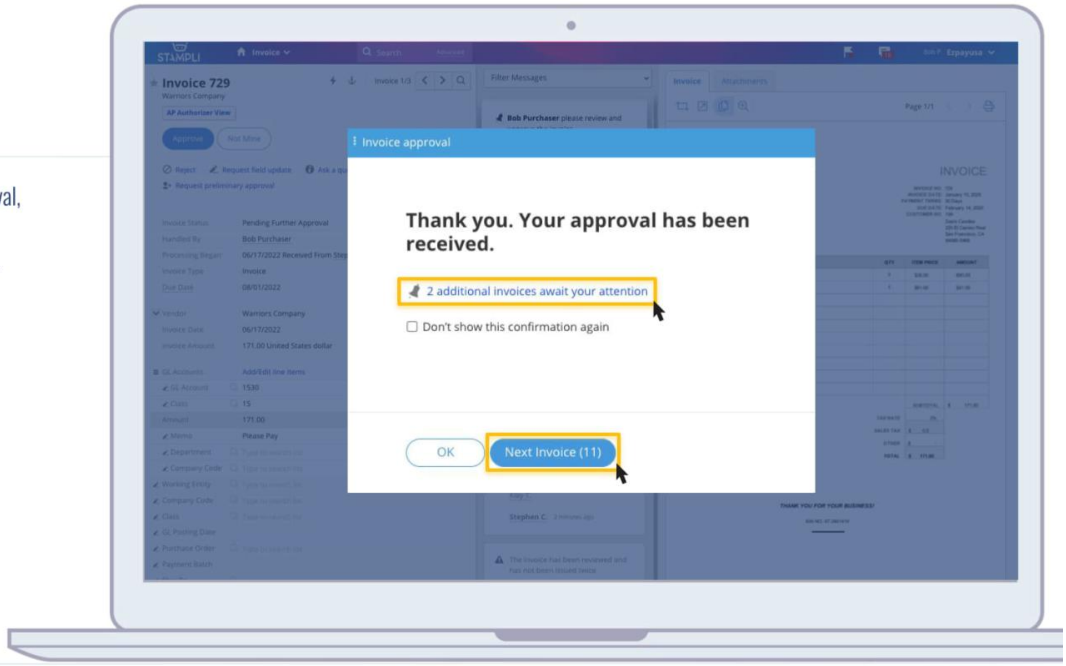
Options when Approving

1. Enter comments in the free text field
2. Attach file
3. Add more approvers
4. Submit approval



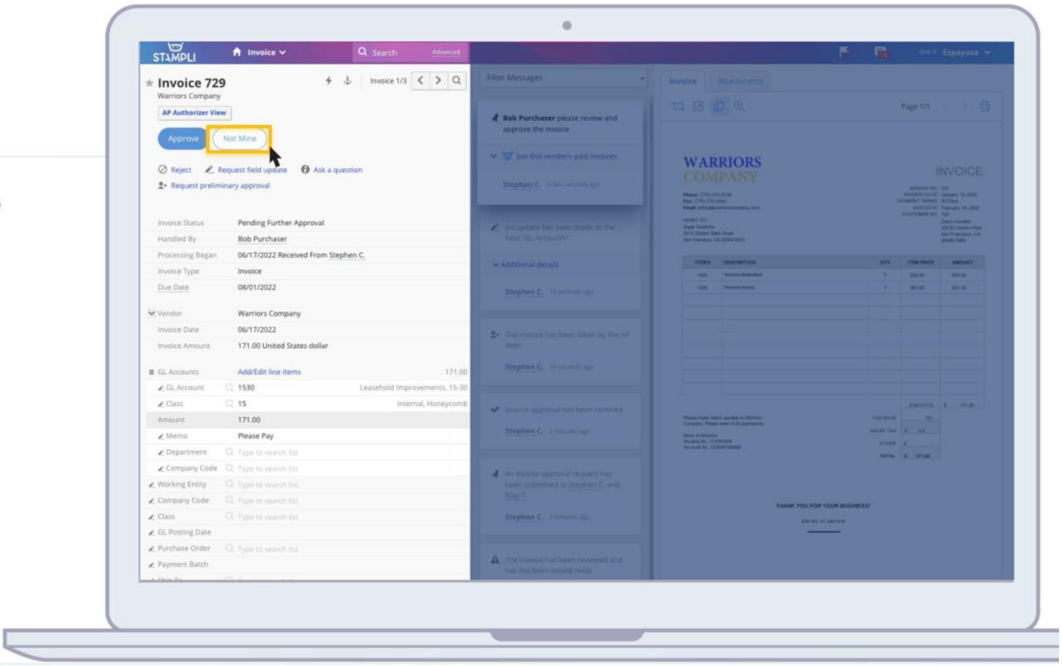
Approve other Invoices

If other invoices require your approval, click **Additional invoices await your attention** or **Next Invoice**.



Indicating Not Mine

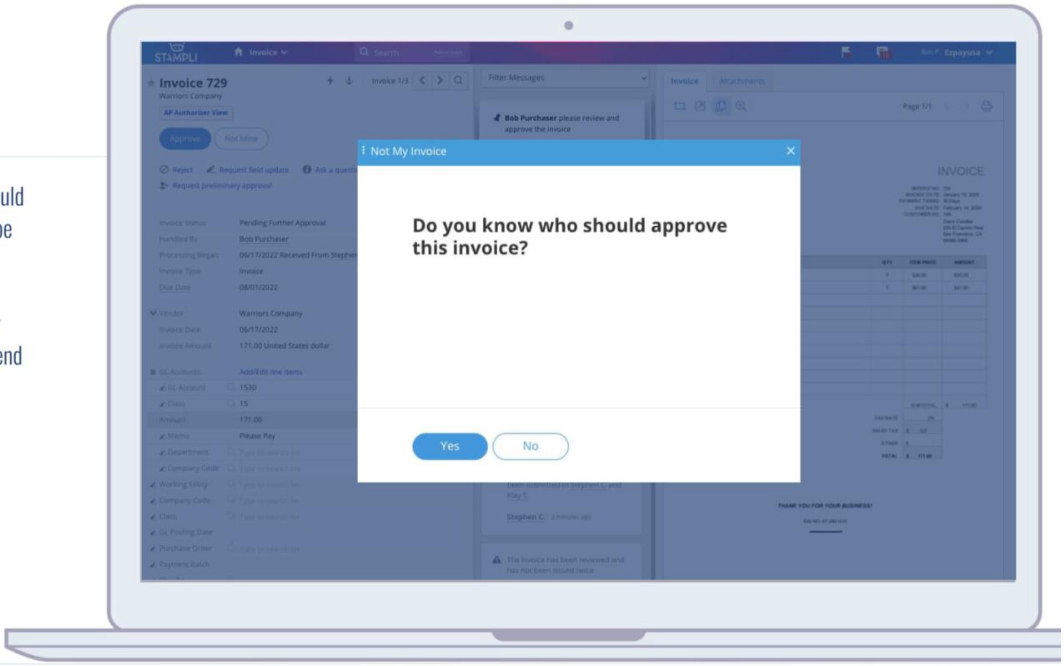
If the invoice does not belong to you, click the **Not Mine** button.



Indicating Not Mine

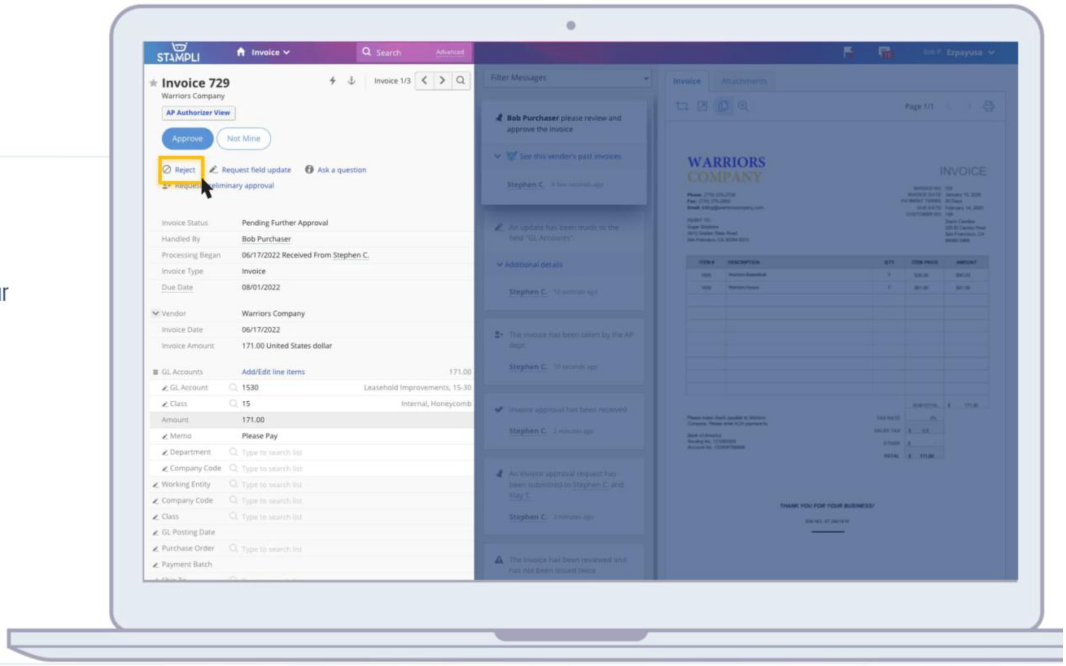
If you know to whom the invoice should be sent, click the **Yes** button and type in their name.

If you do not know who the approver should be,, click the **No** button to send back to your AP team.



Reject the Invoice

When **Reject** is clicked, select the reason for the rejection from the drop-down box that appears. The invoice will then be sent back to your AP Team

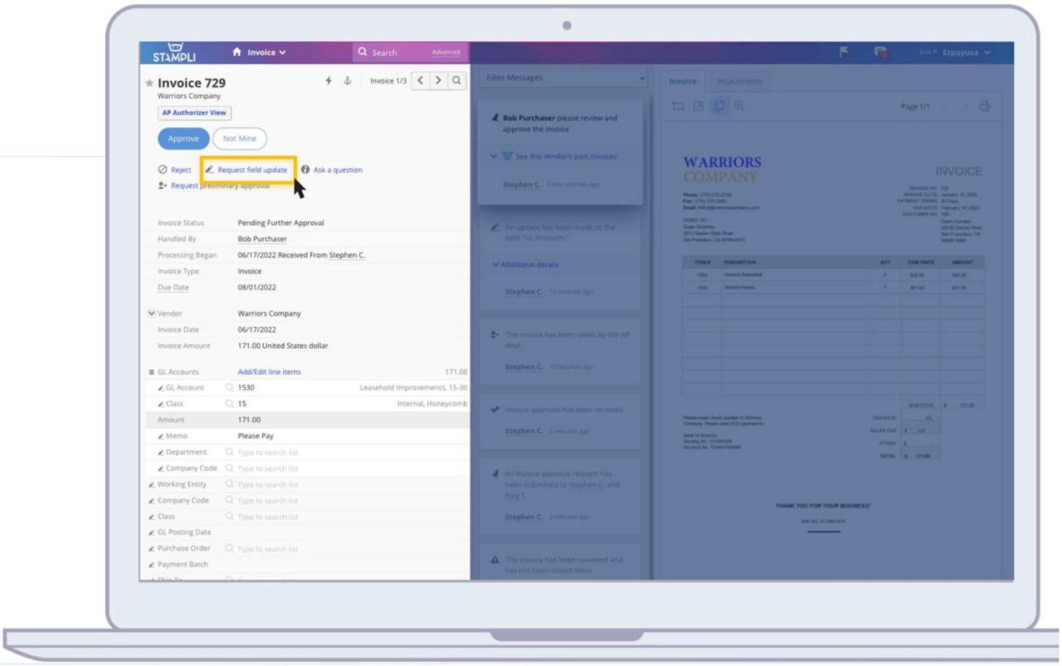


Field Update Request

Request an update to an invoice field (e.g., location, GL account, cost center, department, etc) by:

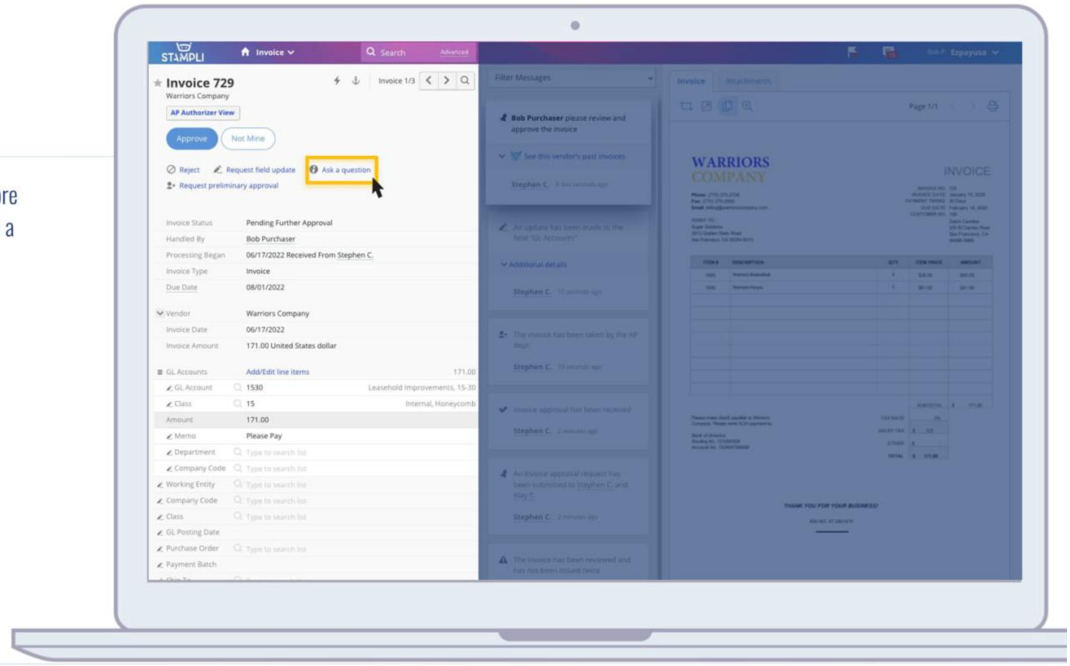
1. Selecting a field from the drop-down box
2. Enter the contact (If the person is not on the list, contact AP or your Stampli Admin)

**This option may not be available if all invoice fields are editable by AP only*



Ask a Question

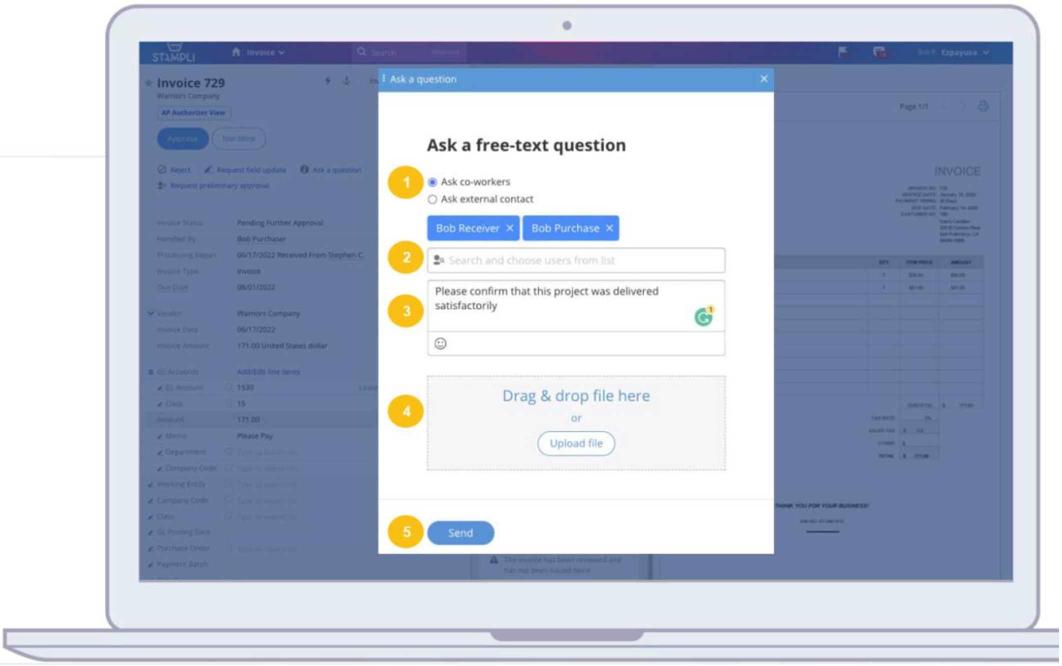
If you need further information before approving the invoice, you can send a question to a coworker, vendor, or other external contacts.



Ask a Question: Internal

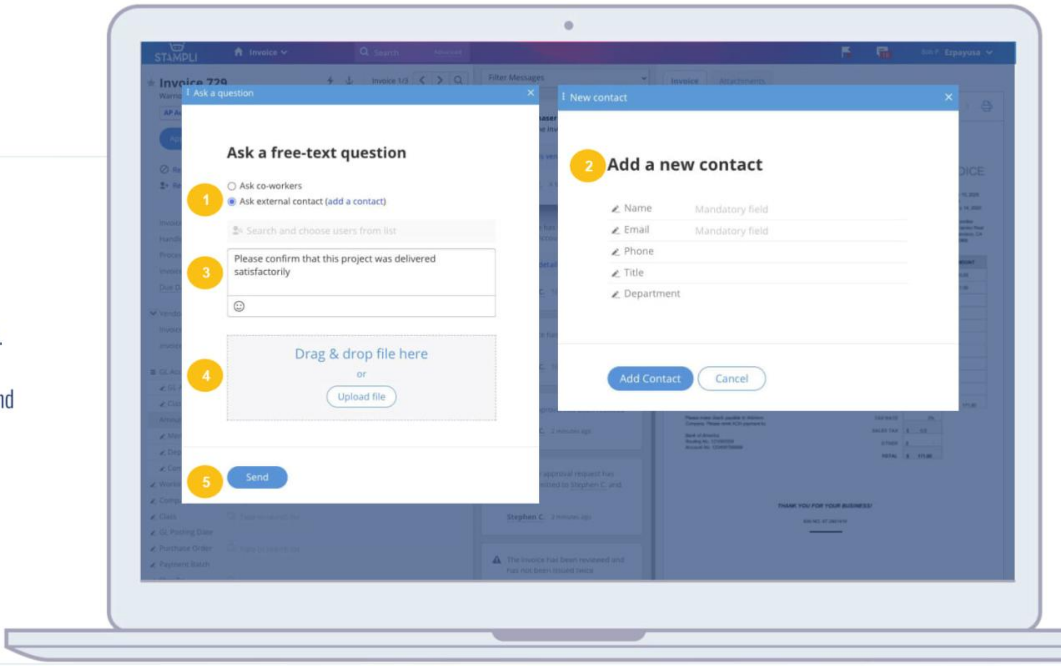
1. Select Ask **Co-Workers**.
2. Start typing a colleague name to see autofill options. Select from the list.* You can select multiple people.
3. Type your question.
4. Attach a file, if needed.
5. Click **Send**.

If the person does not appear in the list, contact AP or your Stampli Admin to add the person.



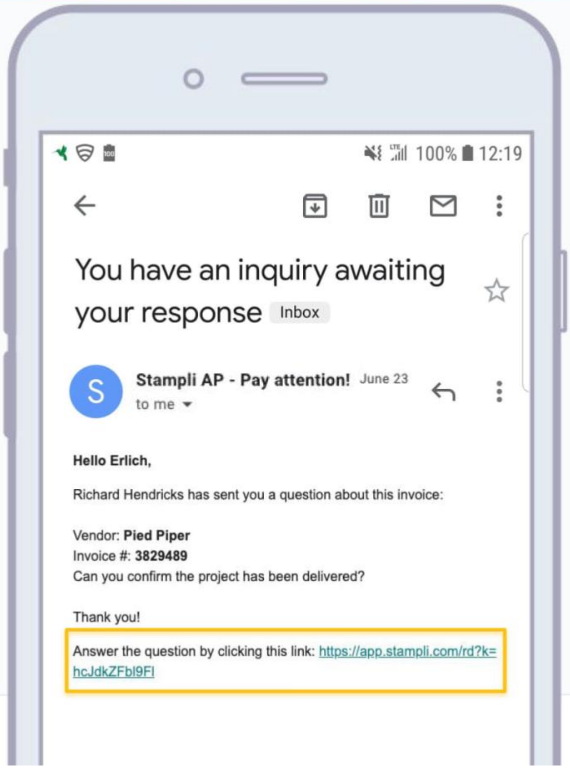
Ask a Question: External

1. Select Ask External Contact option and click ***Add a Contact***.
2. In **Add a New Contact** window, enter contact details. The vendor name is automatically provided. To send a question to a non-vendor contact, uncheck ***Add as a Vendor Contact***.
3. Type your question.
4. Attach a file, if needed.
5. Click Send.



Recipient of a Question

An email is sent to the person who has been asked a question. A link to the invoice is available in the email.



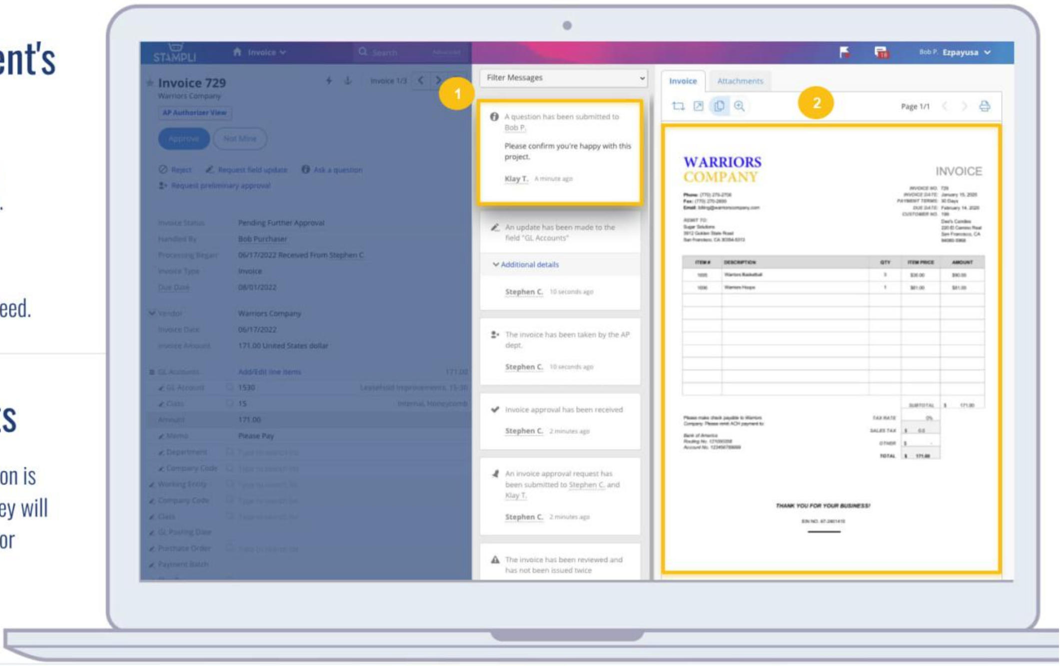
1 Question Recipient's View of Invoice

Similar to Approvers, question recipients can view the invoice.

To respond to a question, the recipient just needs to type a response in the Conversation Feed.

2 External Contacts

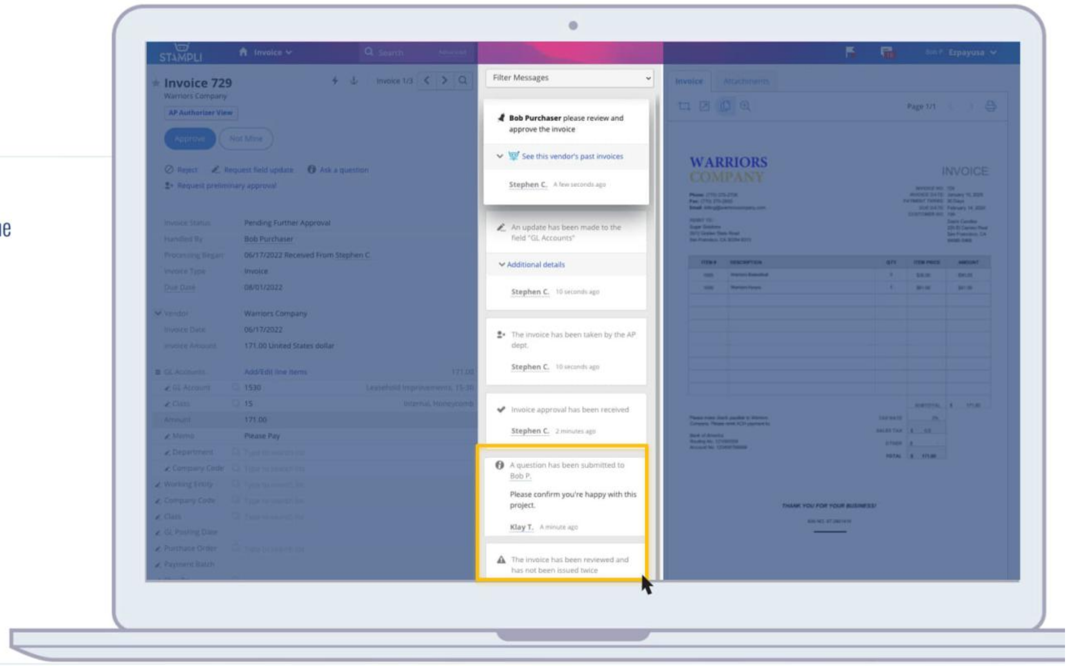
Only the invoice and the question is visible to external contacts. They will not see the Conversation Feed or invoice coding information.



Question Response

Responses to questions or field update requests can be viewed in the Conversation Feed.

If further clarification is needed, an Approver can click **Reply**.



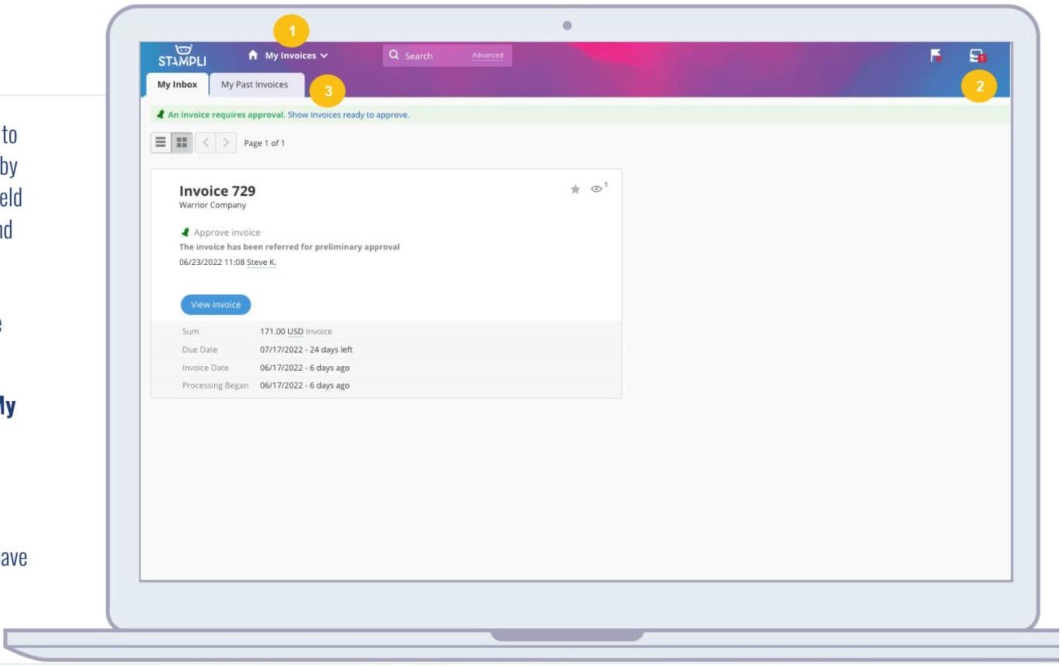
My Inbox

All invoices that have been assigned to you for Approval or for clarification (by receiving a question or request for field update by someone else) can be found in My Inbox.

There are several ways to access the Inbox:

1. From the main menu, select **My Invoices**.
2. Click on the **Inbox tray**.

To view all invoices with which you have been involved, go to **My Past Invoices (3)**.



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