

# Coder Guide

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STAMPLI

# Customer Training Coders/Routers



User Guide



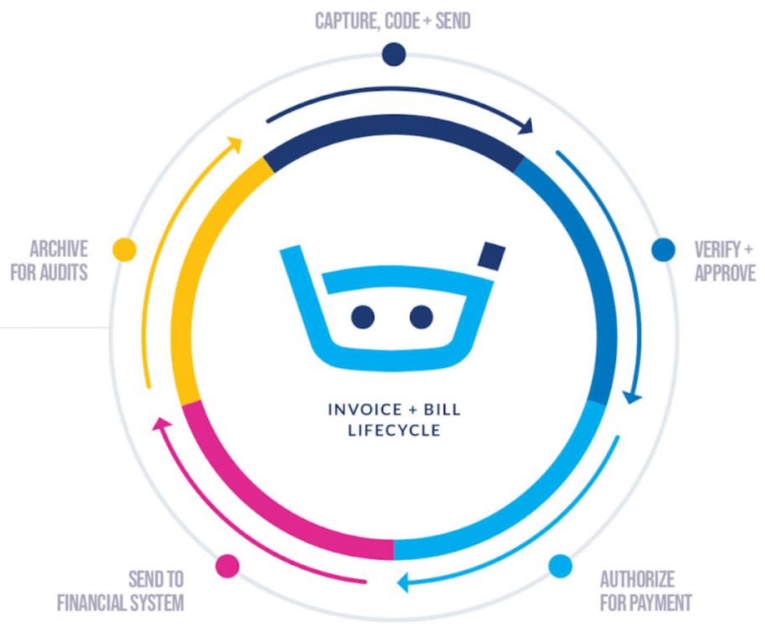
  
**Welcome  
to Stampli!**

Your AP team is using Stampli to take control over the invoice lifecycle.

As a Coder/Router, our intuitive platform helps automate invoice capture, coding, and approval workflows.

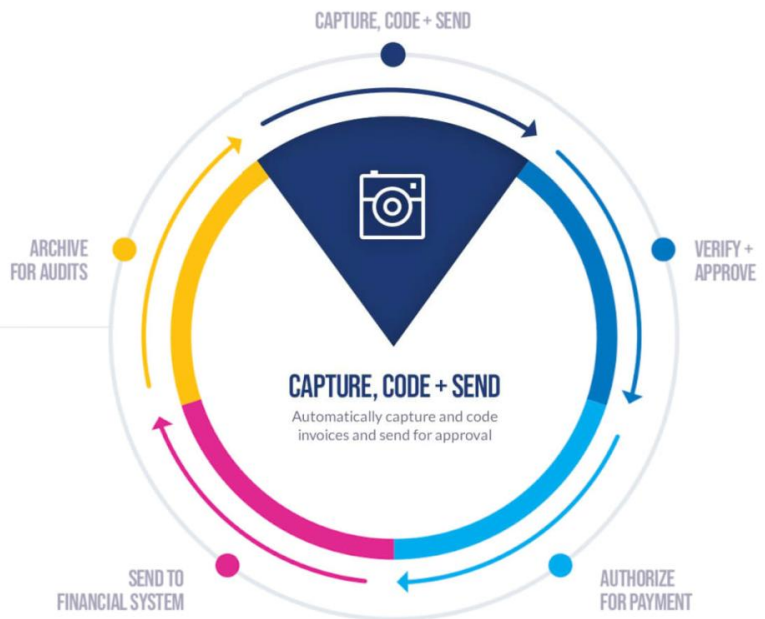
# Invoice Lifecycle

Lifecycle of an invoice within Stampli



# Capture, Code, Send

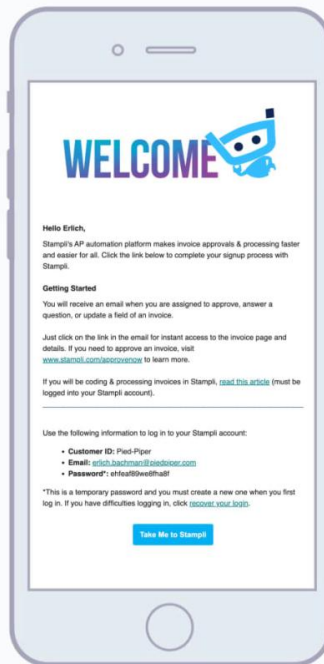
When **Coder/Routers** are brought into the process.



# Sign Up for Stampli

If you have not yet signed up for a Stampli account, you will need to sign up.

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



## 1.

### Welcome Email

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

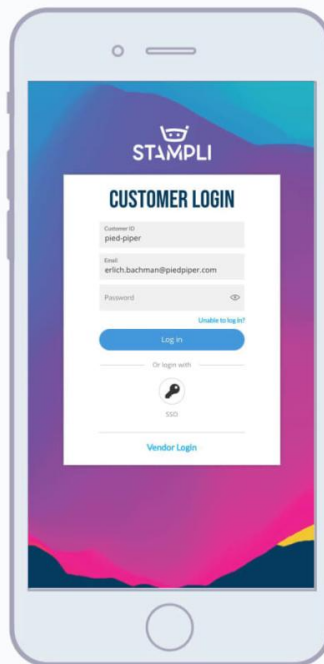
Go to the bottom of the email and note your Customer ID, Email, and Temporary Password.

Click on **Take Me to Stampli**.

# Sign Up for Stampli

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## 2.

### Login + Create Password

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

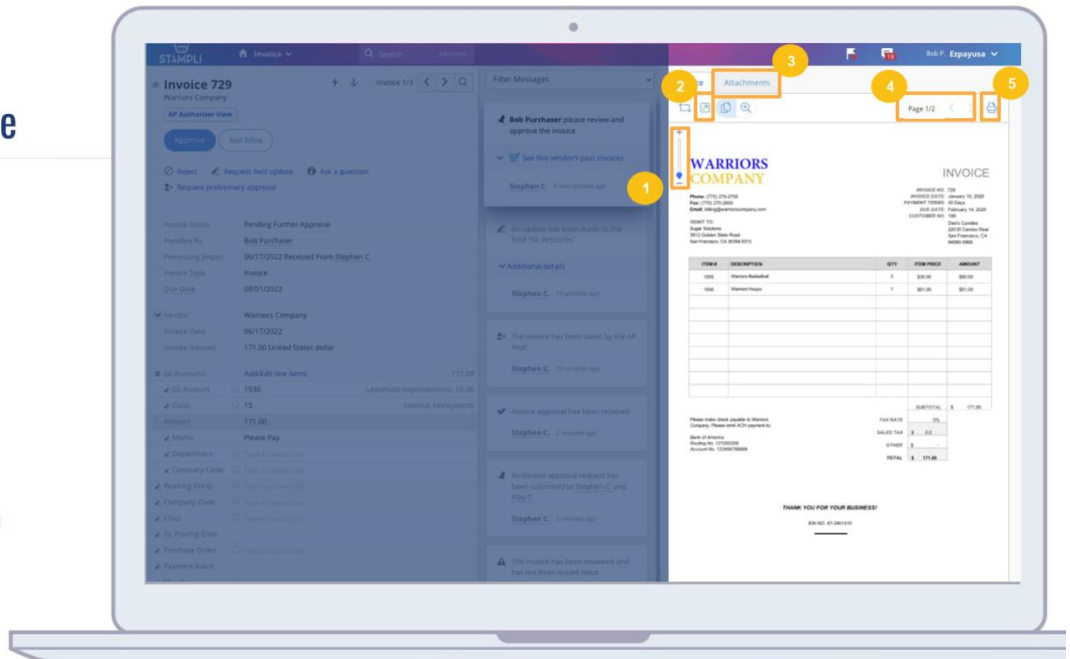
Enter the temporary password provided in the email.

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

## 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

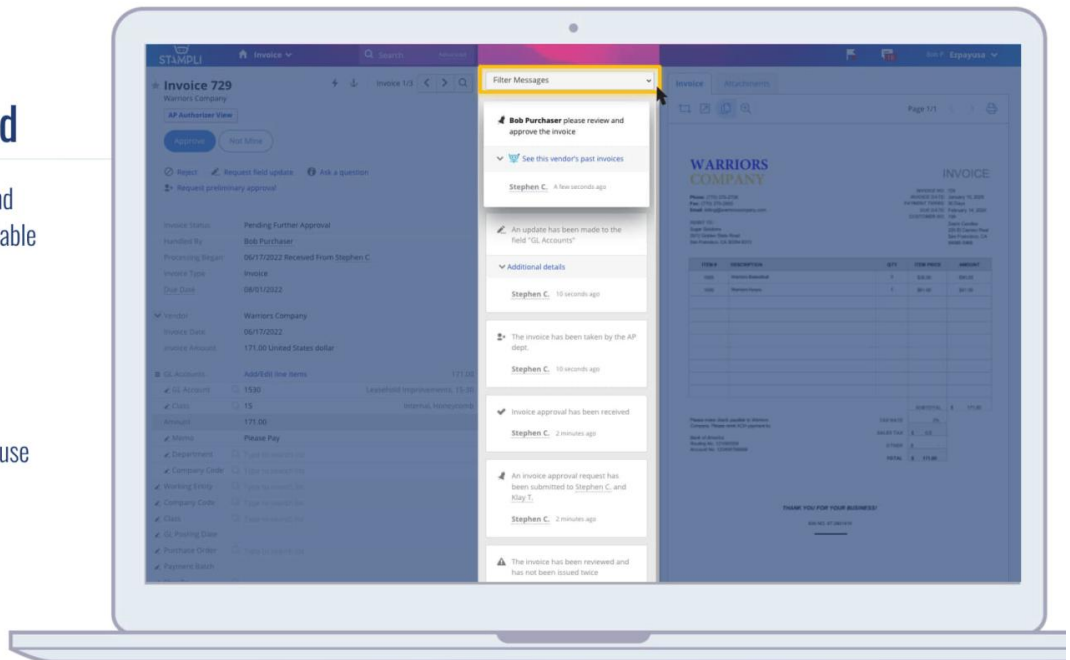


## Conversation Feed

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

The most recent activity is shown at the top.

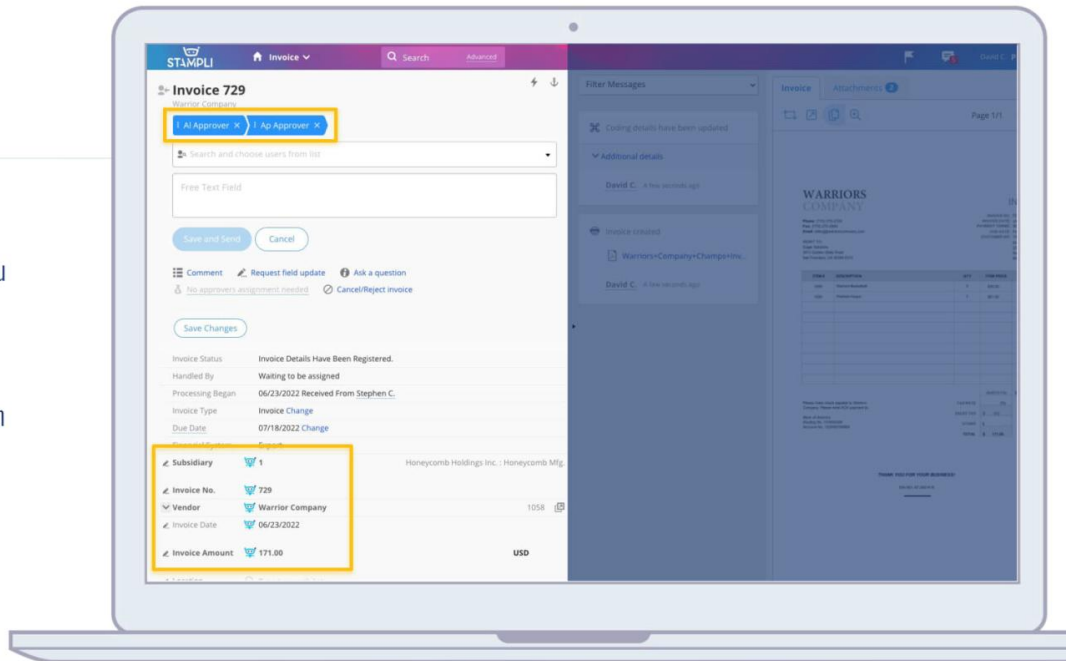
To view only specific activities, use **Filter Messages**.



## Billy the Bot

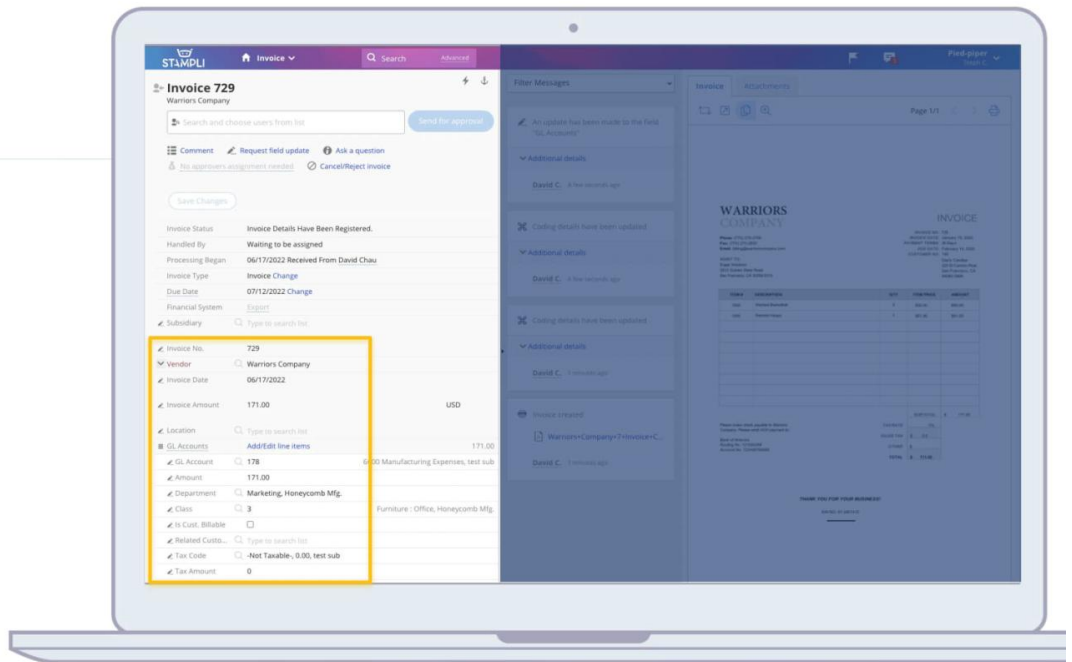
Billy the Bot uses AI and machine learning to populate invoice fields. The more that you use Stampli, the smarter Billy will become.

All areas that have the Billy icon are auto-filled values.



## Coding

Using Billy and manual data entry, fill in Invoice information including GL, department, and other required information.



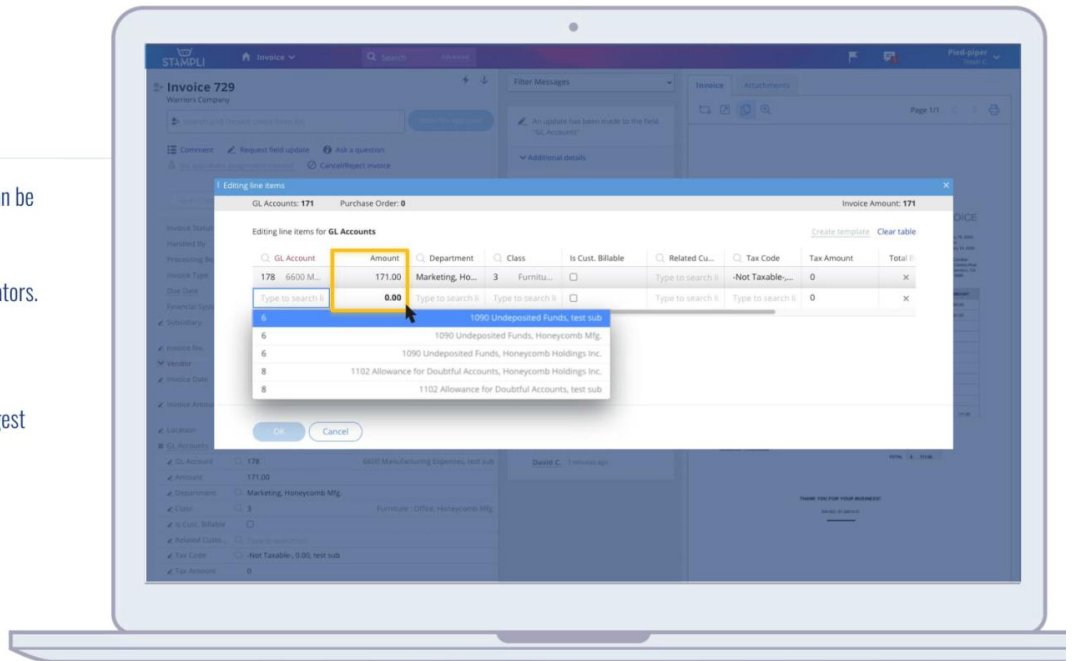
## Line Items

With Stampli, multiple line items can be easily handled by using a table.

All numerical fields are auto-calculators. Enter formulas and Stampli will automatically calculate the results!

Billy will also auto-populate or suggest fields based on past invoices.

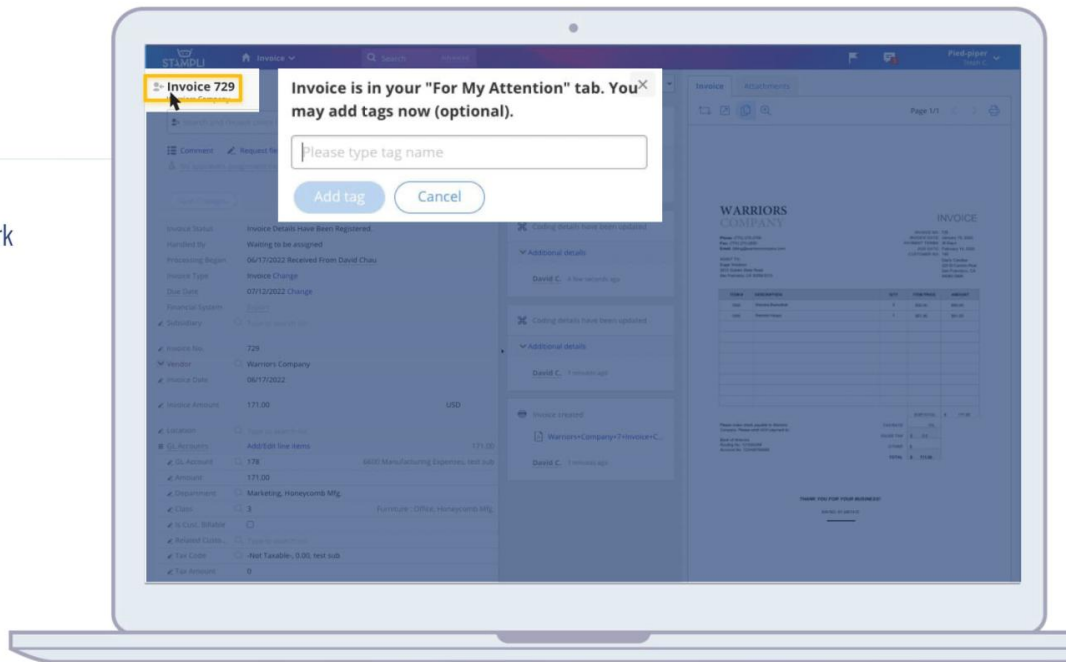
If you have multi-line invoices from specific vendors, you can use table templates.



## For My Attention

To put invoices out of queue so other Coder/Routers do not work on them or to flag specific invoices for follow up, select person icon beside the invoice number.

You can select tags to group similar invoices together.

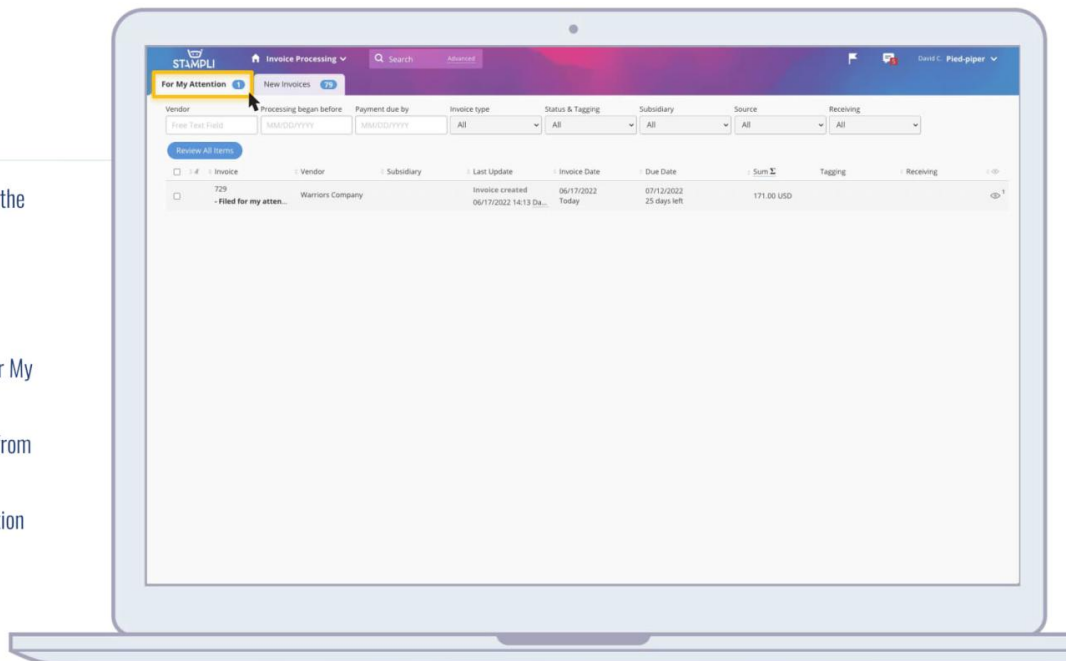


## For My Attention

Select **Invoice Processing** from the main menu and go to the **For My Attention** tab.

This folder displays:

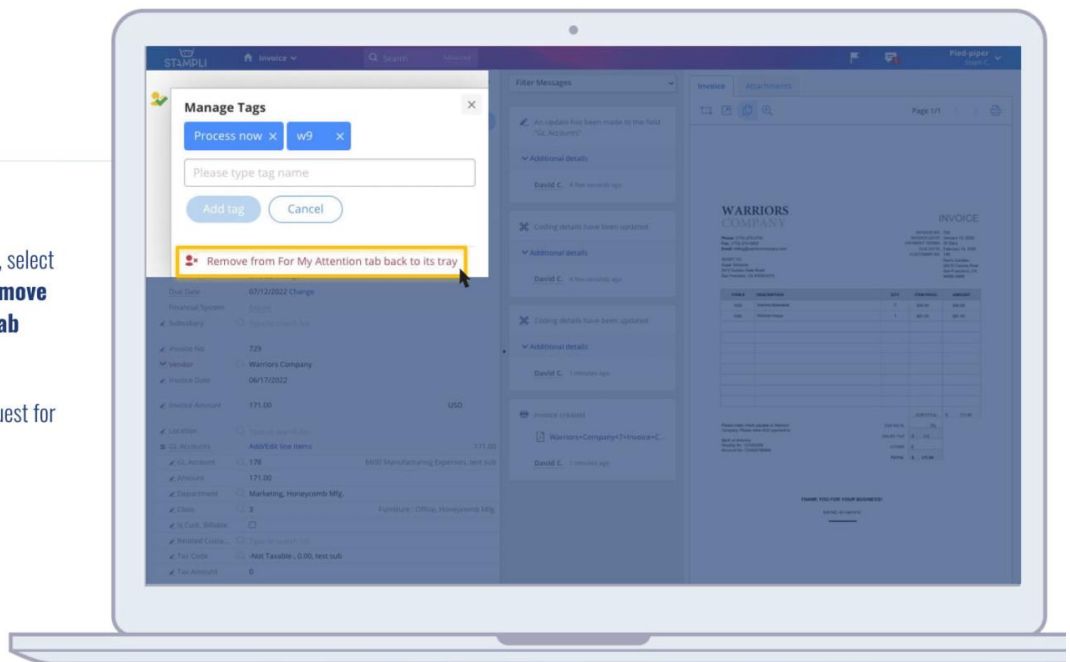
- Invoices you have marked For My Attention
- Invoices requiring an action from you
- Invoices you are awaiting action from someone



## For My Attention

To remove items from the folder:

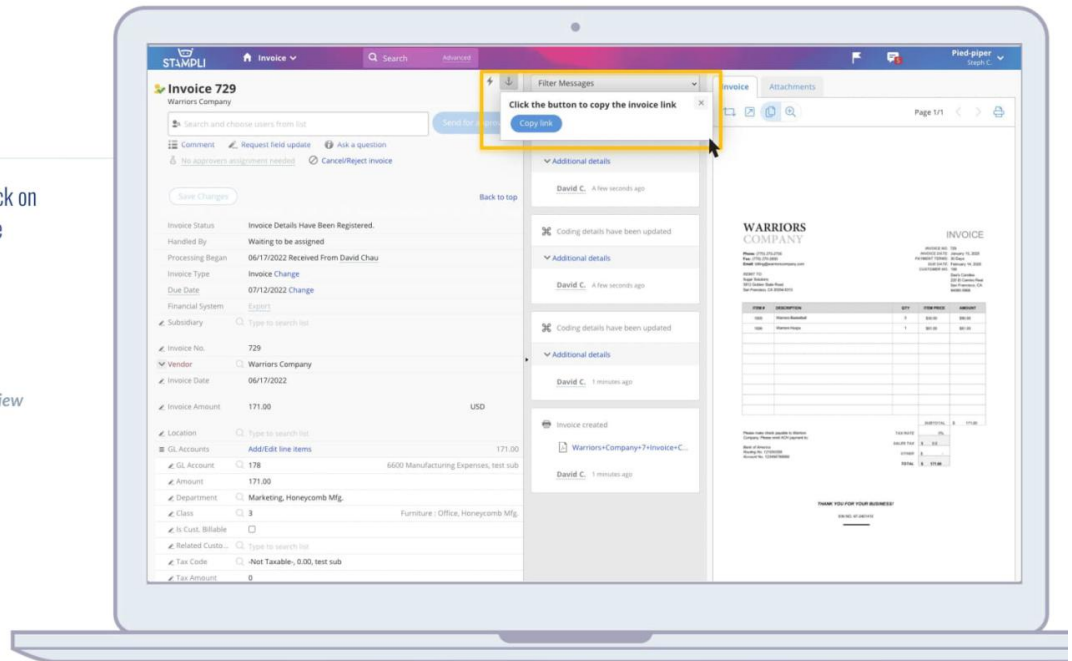
1. For invoices manually moved, select the person icon and click **Remove from For My Attention tab back to its tray**
2. Respond to an inquiry or request for update or approval.



## Anchor Link

To share the URL of the invoice, click on the **Anchor** icon beside the invoice number and click the **Copy Link** button.

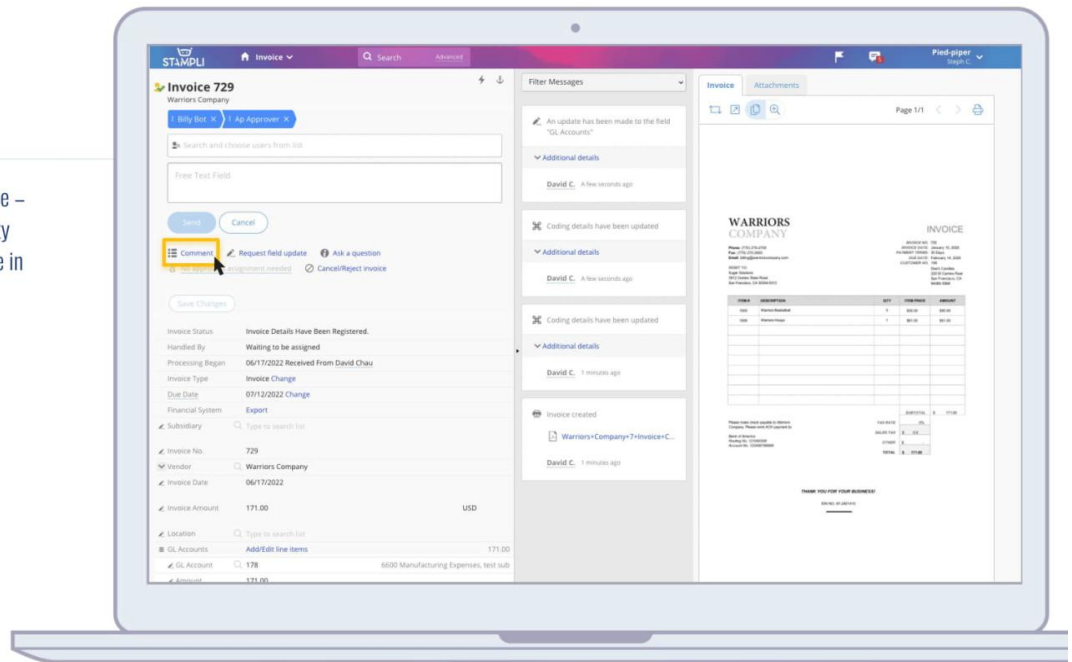
*NOTE: Only users with permission to view the invoice will be able to see it.*



## Comment

To provide a comment on the invoice – which will be viewable in the activity thread – click **Comment** and write in the free text field.

Attachments can also be added.

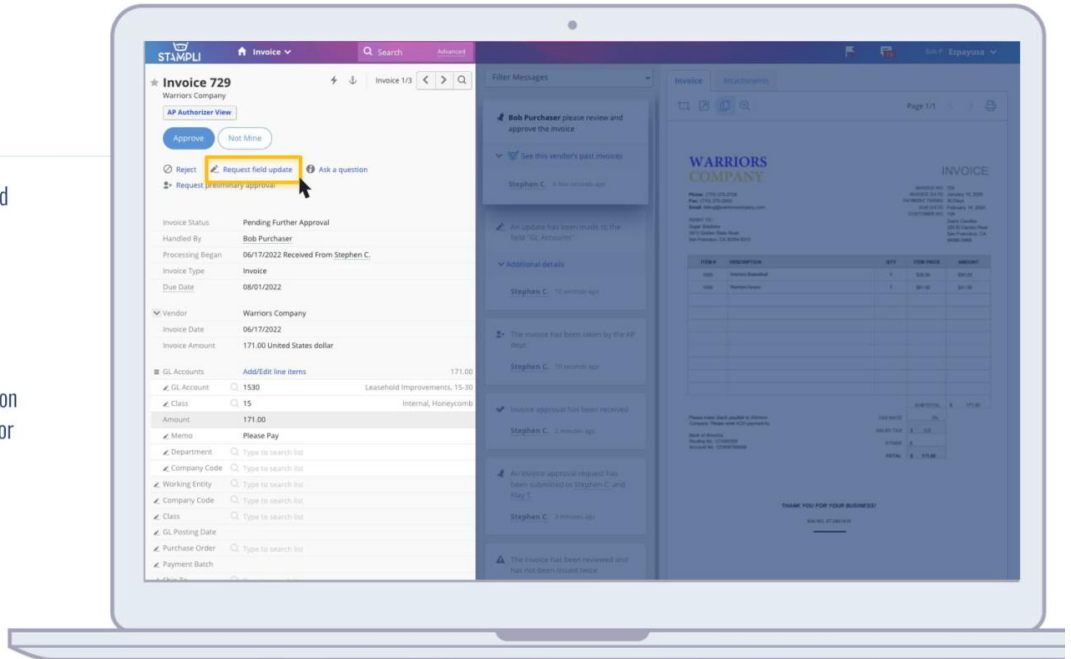


# Field Update Request

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

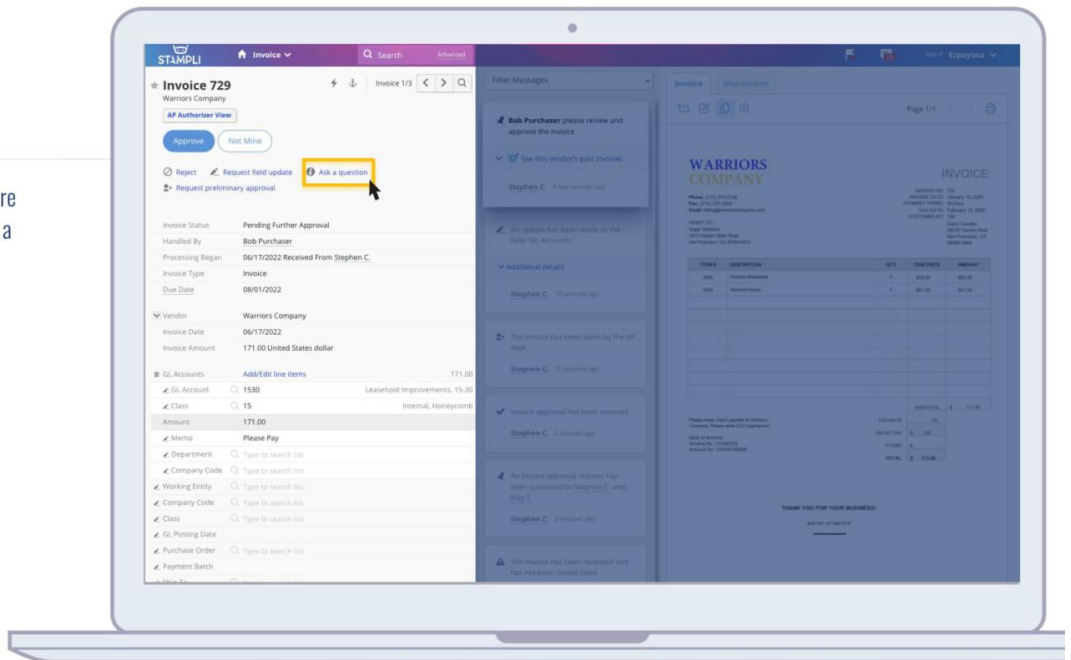
1. Selecting a field from the drop-down box
2. Enter the contact (If the person is not on the list, contact AP or your Stampli Admin)

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



# Ask a Question

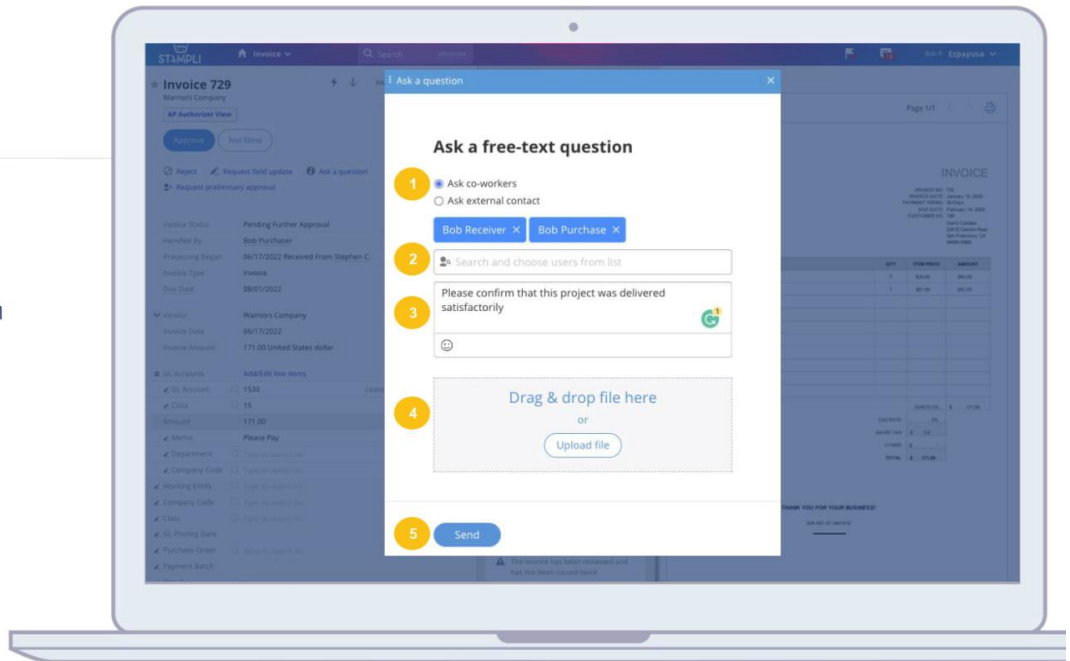
If you need further information before approving the invoice, you can send a question to a coworker, vendor, or other external contacts.



## Ask a Question: Internal

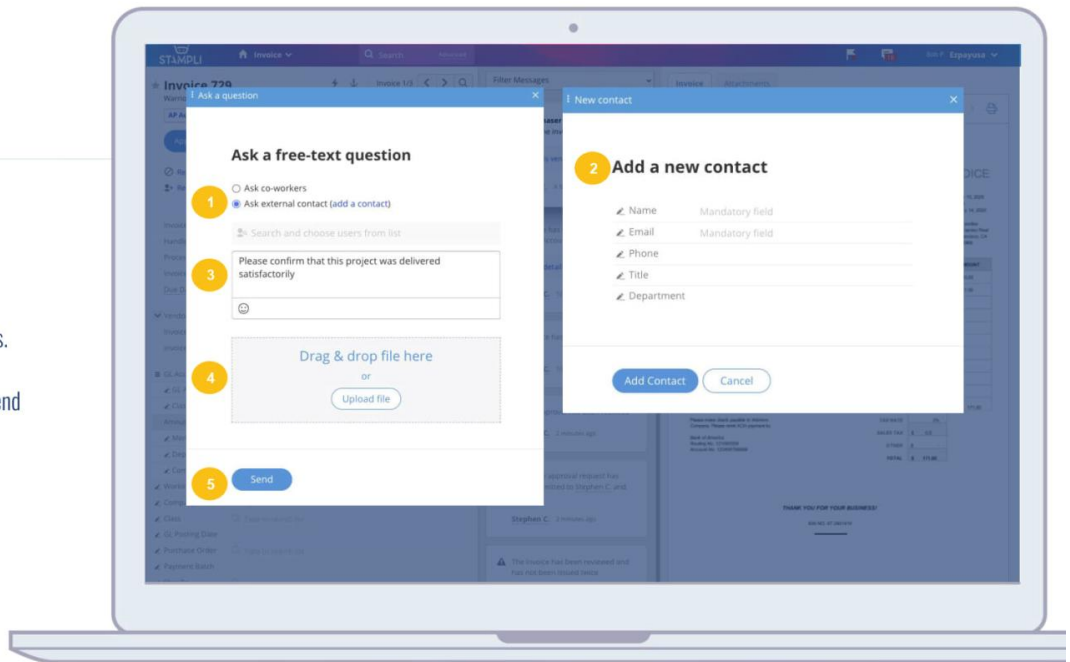
1. Select Ask **Co-Workers**.
2. Start typing a colleague name to see autofill options. Select from the list.\* You can select multiple people.
3. Type your question.
4. Attach a file, if needed.
5. Click **Send**.

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



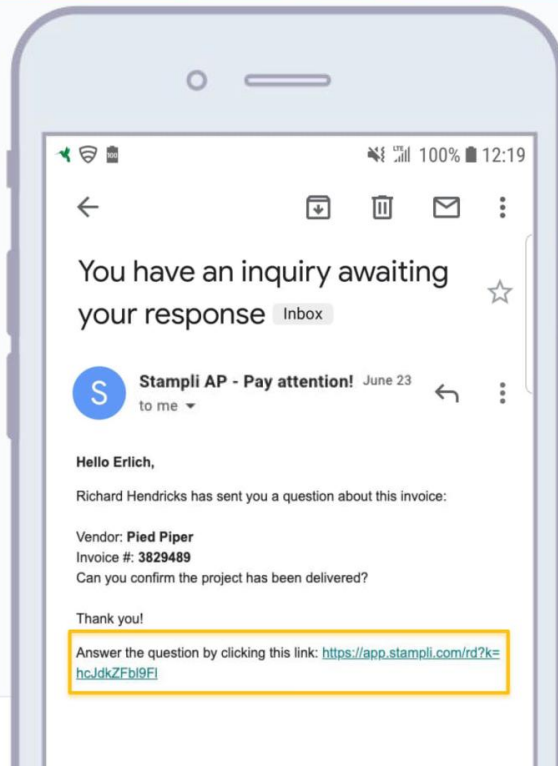
## Ask a Question: External

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.



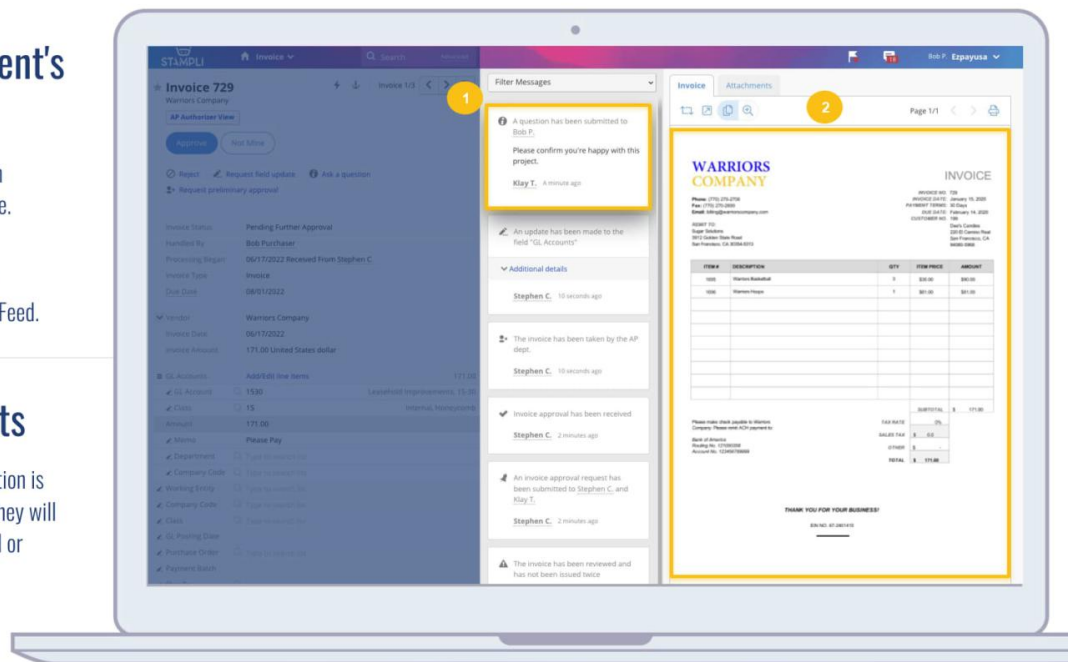
## 1 Question Recipient's View of Invoice

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

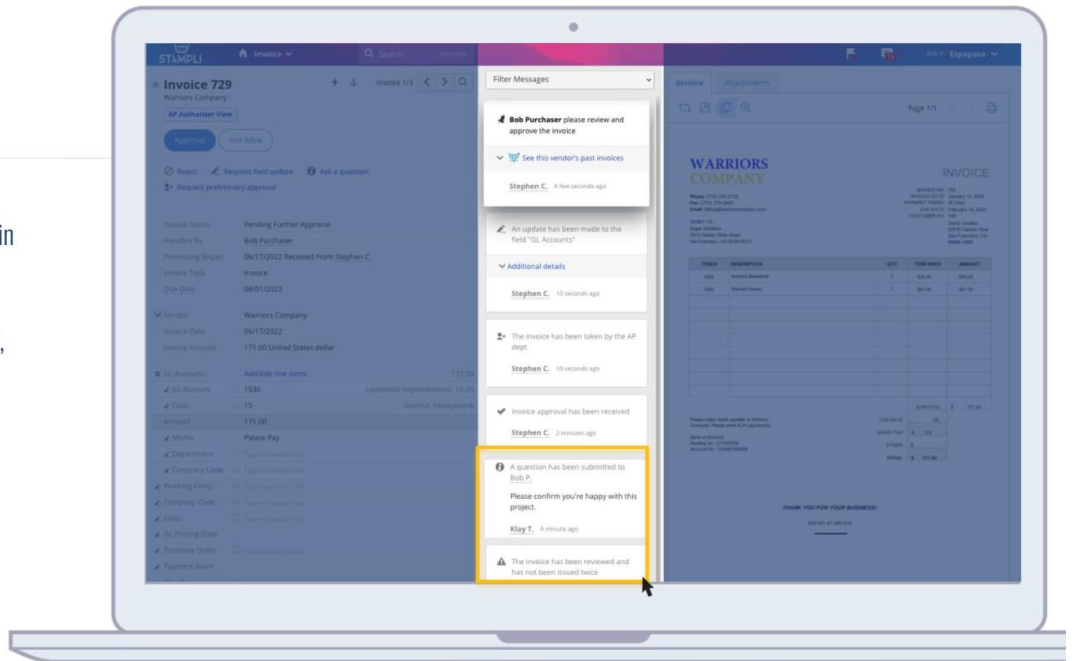
Only the invoice and the question is visible to external contacts. They will not see the Conversation Feed or invoice coding information.



## Question Response

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

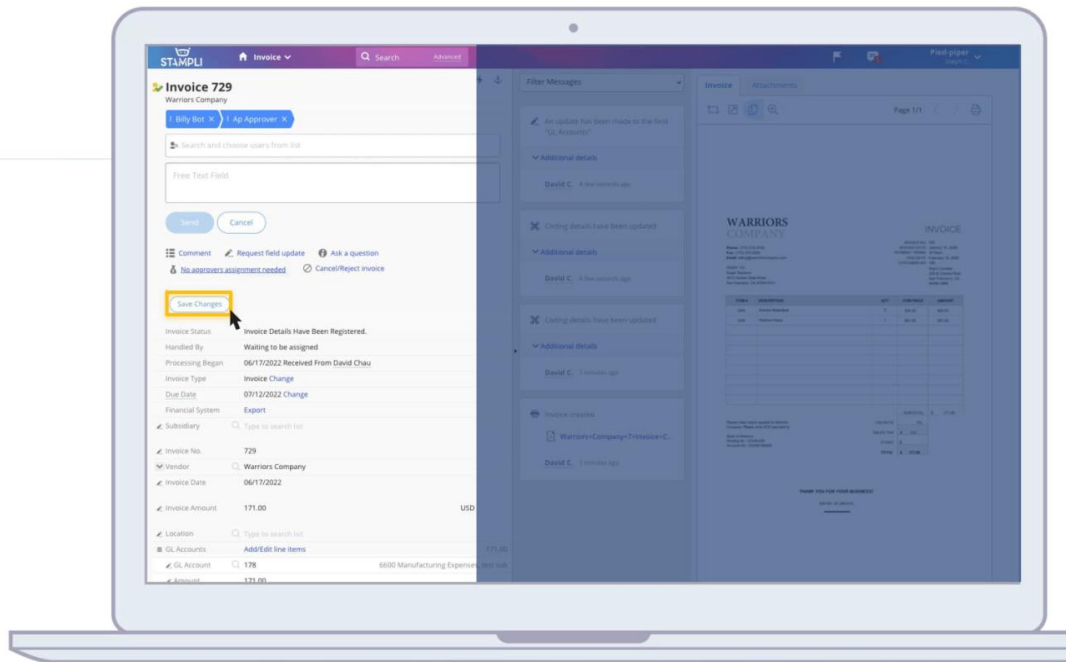
If further clarification is needed, an Approver can click **Reply**.



## Save Changes (Register Invoice)

After coding the invoice, click **Save Changes**.

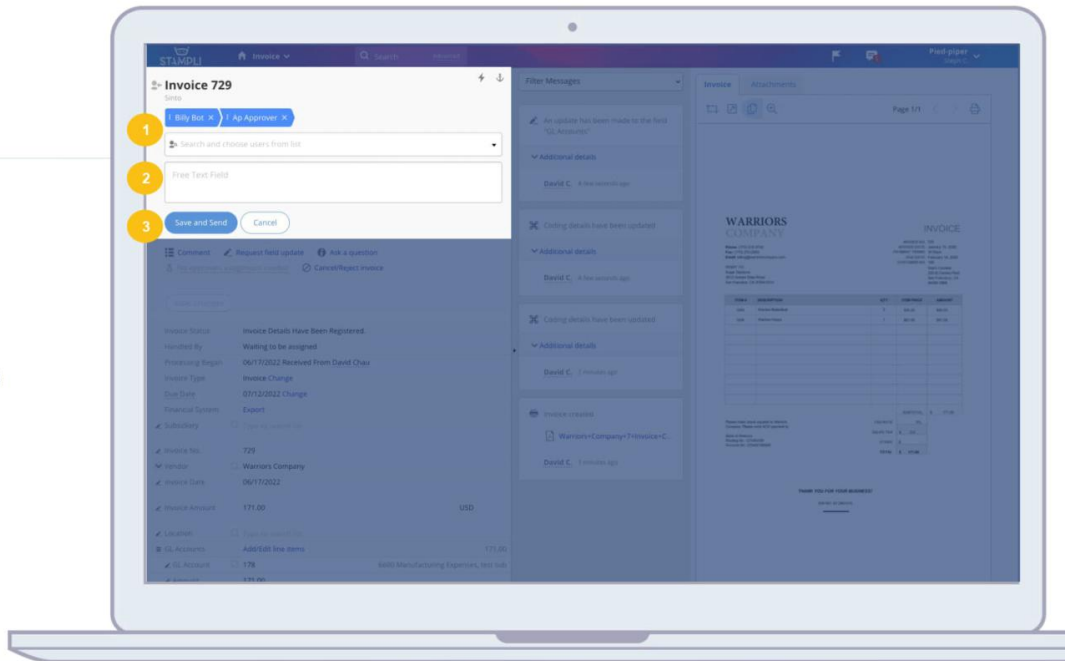
At this point the invoice is registered and will be displayed in the Vendor Portal.



# Route for Approvals

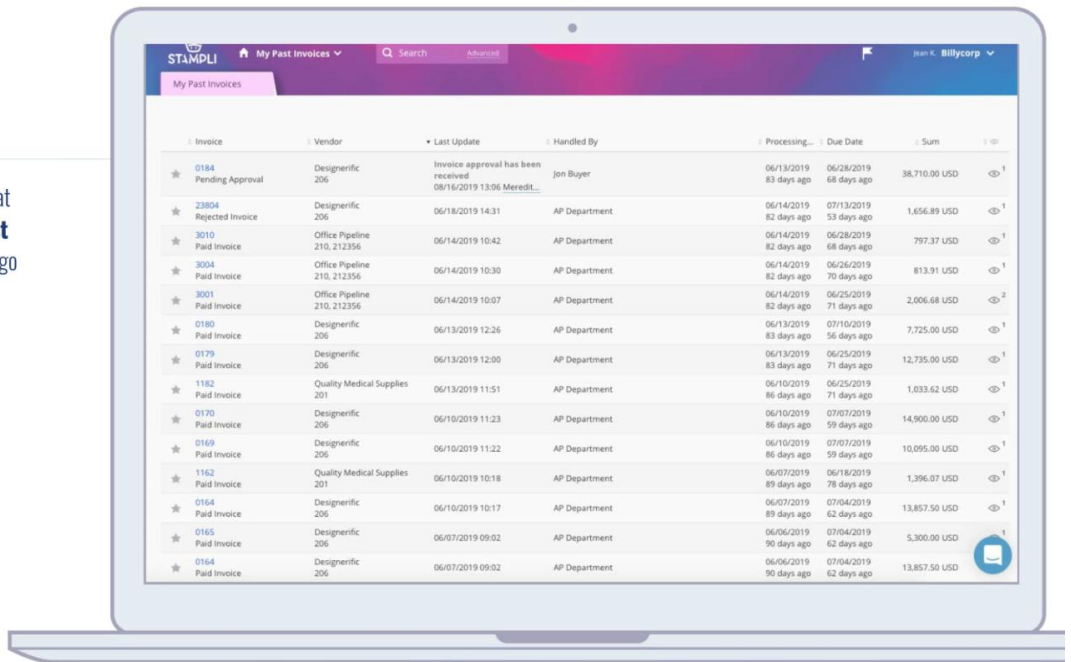
Once the invoice is ready for approval:

1. Use Billy's auto-suggestions or manually enter approver names. With multiple approvers, the invoice will be sent in the order that approvers are entered.
2. Enter comment as needed.
3. Click **Save and Send**.



# My Past Invoices

To view the status of all invoices that you have processed, select **My Past Invoices** from the main menu and go to the **My Past Invoices** tab.



Revision #1

Created 2024-09-02 02:14:49 UTC by Nicole Blum

Updated 2024-09-02 02:16:03 UTC by Nicole Blum