

## BEN Pays Invoice Imaging Managing Invoice Holds

11/06/15

If an invoice for a PO for which you are the Buyer is on 'Hold', an e-mail will be sent to you **daily** until the 'Hold' has been resolved.

**From:** Accounts Payable [apsup@exchange.upenn.edu]

**Sent:** Monday, December 9, 20XX 8:05 AM

**To:** Ishmael, David W.

**Subject:** You have invoices in your Web Inbox

Hello BARBARA RUSSELL,

You have at least one invoice to review in your BEN Pays Web Inbox. Please login and provide the necessary approval or resolution.

Login to the Web Inbox with your BEN Financials Username and Password from this URL:

[BEN Pays Web Inbox](#)

Please do not reply to this e-mail. If you have questions about accessing the Web Inbox or processing invoices, please refer to the [BEN Pays Invoice Imaging Quick Reference Guide](#) or the [BEN Pays User Guide](#). If you have additional questions please contact BEN Helps at 6-HELP (215-746-4357).

- Click on the BEN Pays Web Inbox link from the e-mail
- Your browser session will now connect to MarkView:

- Enter your **User name** and **Password**

☞ Same as BEN Financials

- Click **[OK]**

You will arrive at the 170 MarkView Home screen

- You will arrive at your 'Current Inbox Items

- Click on the Invoice # to view invoice image, details & markups

1. Follow instructions in **'Message'** area at the top of the page
2. **Actions:**
  - **Resolve Holds** - use to **APPROVE** payment for invoice with **Max Ship Amount & Qty Ordered** holds only
  - ☞ **Do not use Comment Box!** Invoice goes to payment queue. Comment is not seen by Accounts Payable (AP)
  - **Route To Accounts Payable** - use to **CANCEL** invoice
  - ☞ **Comment box is used** to explain reason for cancellation and explanation is sent to Supplier
3. **View:** Resize the invoice for easier review
  - **Action History** - shows a reverse chronological list of all actions
  - **Page Overview** - use to highlight and scroll over invoice
  - **Options** - customize the appearance of viewer toolbars and images
4. **Output:** E-mail or print document as needed - see **Page 4** also
5. Expandable info with more details regarding PO and invoice
  - ☞ Buttons also located beneath Actions above invoice

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After reading the instructions in the 'Message' area, decide to

- Approve an Invoice for Payment (i.e. Pay Invoice) or
- Cancel an Invoice (i.e. Not to Pay Invoice)

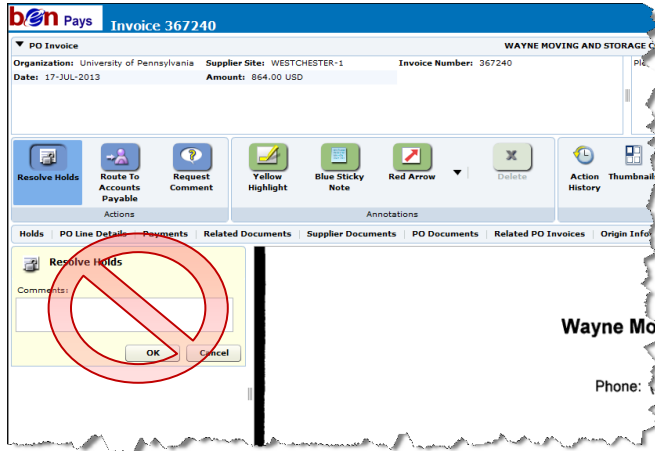
### To Approve an Invoice for Payment

- Click on

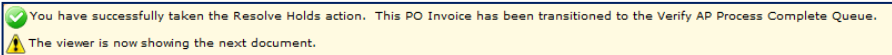


- Click [OK]

- **Do not use Comment Box!** Invoice goes to payment queue. Comment is not seen by AP.



- Message upon completion



### To Cancel an Invoice

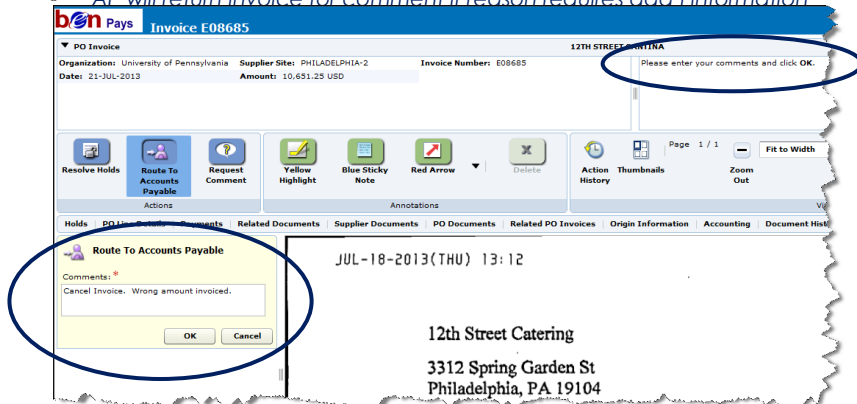
- Click on



- Enter the reason for cancelling the invoice in Comments box

- Click [OK]

AP will return invoice for comment if reason requires add'l information



### Hold Resolution Grid

Hold Type	Approve Invoice	Cancel Invoice
Quantity Ordered Hold (Qty Ord)	Click on 'Resolve Holds'	Click on 'Return to Accounts Payable' with the reason for cancellation in the comment box
Maximum Shipment Hold (Max Ship Amount)	Click on 'Resolve Holds'	
Quantity Receipt Hold (Qty Rec)	Log on to BEN Financials and process receipts via Requisitioner or PO Manager Responsibility. No further action is needed. <b>Please do not use 'Holds Resolved' or 'Route to Accounts Payable' to indicate 'OK to pay'. These will not remove the Hold.</b>	<b>Important! Please do not click on 'Resolve Holds'</b>
Multiple Holds	Click on 'Resolve Holds'. If one of the holds is a QTY REC Hold, log on to BEN Financials and process receipts via Requisitioner or PO Manager Responsibility	
Request Comment (170_SYSTEMS_HOLD)	Review message sent by Accounts Payable by clicking on Action History. Read the comment by clicking on the ►. Click on 'Return To' with information requested.	

### Additional Features...

#### Request Comment & Return To



#### Request Comment

To view comment, read the message area at the top or click on then click on ► to read comment

- Use when more information or clarification is needed



#### Return To

- Markup used to respond to Request Comment
- Response information is entered in Return To comment box

#### Email Document

- Sends e-mail w/link or PDF of invoice image w/your comments for others to review
  - Reviewer CANNOT apply 'Actions'
- Reviewer can use Annotations (Yellow Highlight, Blue Sticky Note, etc.)

#### Fields required to be completed:

- **To...** – Click on this to type 'Filter Criteria' and select the desired person
  - ◁ Click on To-> and their name & e-mail will populate
- **Subject**
- **Message**

**BEN Helps 6-HELP (215-746-4357)**  
**BEN Knows**  
<http://www.finance.upenn.edu/benknows/>