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Accounts Payable Invoice Imaging (MarkView)

Objectives

Upon completion of this section, you will:

- Have an understanding of the purpose of BEN Pays
- Understand the procedures surrounding the BEN Pays function
- Learn how to access invoices using the following:
  - MarkView Home Page
  - Web Inquiry
- Know how to manage BEN Pays ‘Current Inbox Items’
  - ‘Resolve Holds’ on invoices for purchase orders
  - ‘Route to Accounts Payable’ for invoices to be canceled or other reason
Overview of BEN Pays

Features

- Electronic handling of invoice holds
- Ability to view invoices on-line
- Allows for viewing images of:
  - All Purchase Order Invoices
  - Non-PO Payment Requests, invoices, and attached supporting documentation

What is NOT imaged?

- PO supporting documentation (e.g. contracts, competitive bids)
- Travel documentation

Goals/Objectives

- Improve invoice processing
  - Faster turnaround time
  - Fewer requests for invoice information
- Improve overall disbursement process
  - Holds resolved faster
  - Errors corrected electronically
  - Improve Supplier relationships

MarkView Imaging

- Imaging system software
- Integrated with BEN Financials
- Available during normal BEN Financials hours
  - Monday-Friday 7 a.m. - 8 p.m.
  - Saturday 8 a.m. - 6 p.m.

Desktop Configuration

Consistent with current University standards

http://www.finance.upenn.edu/ben/benfin/desktop_req/

Local Support Providers (LSP’s)

http://www.upenn.edu/computing/view/support/staff.html
- List of primary computer support assigned by Center and by Department
Overview of BEN Pays (continued)

Access/Security

- *MarkView* user name and password
  - Assigned automatically to all BEN Financials PO Managers, Invoice Inquiry, and BEN Balances users and selected Senior BA’s within each School/Center
  - Same user name and password as BEN Financials logon information
  - Dedicate browser to *Imaging* session
  - User remains logged on until browser is closed
  - MarkView Home loads each time URL is accessed

* URL to access the "MarkView Home" will be sent via e-mail from Accounts Payable when Holds are applied to an invoice

Important Web Addresses

U@Penn Portal

[http://medley.isc-seo.upenn.edu/penn_portal/u@penn.php](http://medley.isc-seo.upenn.edu/penn_portal/u@penn.php)
- Access to a wide variety of University web sites and information including those listed below

BEN Financials Homepage

[http://benapps.isc-seo.upenn.edu](http://benapps.isc-seo.upenn.edu)
- Access to BEN Financials and BEN Deposits

Business Enterprise Network

- News, Calendar, BEN Reps, BEN Knows, Frequently Asked Questions, Support Information, etc.

Financial Training Department Web Page

[https://www.finance.upenn.edu/financial-training-department](https://www.finance.upenn.edu/financial-training-department)
- Information regarding courses offered, register for training, view the Bottom Line Newsletter, etc.

Audit and Compliance Web Page

[http://www.upenn.edu/oacp/](http://www.upenn.edu/oacp/)
- Information on controls, compliance mechanisms, and technologies to manage risk as well as providing guidance on the stewardship of University resources

Responsibility Center Management (RCM)

[http://www.budget.upenn.edu/About/RCM_at_Penn/](http://www.budget.upenn.edu/About/RCM_at_Penn/)
- Information about BEN Financials Reports, Fund Aggregations & Object Code Aggregations, etc.
Overview of BEN (continued)

Purchasing Services Web Page

https://cms.business-services.upenn.edu/purchasing/
• Information about BEN Buys, the Commodity Matrix, Supplier information, etc.

Purchasing Forms

https://cms.business-services.upenn.edu/purchasing/policies-a-forms/forms.html
• Request to Add a New BEN Buys Ship-To-Location
• Request for University Tax Exemption Certificate
• Request to Resend Approved Purchase Order to Supplier
• And more...

Need Help?

Dial 6-HELP (6-4357 or 215/746-4357)
• Enter your two-digit School or Center code
• BEN Helps is available 9:00 a.m. to 5 p.m. Monday through Friday

BEN Knows Web Page

https://www.finance.upenn.edu/ben-knows/ben-knows
• Web site to browse and search for possible solutions to your BEN Financials questions

Penn eForms

Penn eForms are required for entry to most University financial systems. These eForms should be processed promptly to ensure system access following training. **If an eForm has not been processed within 60 days or more of attending a training course, you will be required to repeat the course to obtain access.**
Glossary of Terms

Action
In the MarkView viewer, you take actions to process documents. Taking an action moves the document to the next step in Accounts Payable.

Buyer
PO Manager whose approval or submission of a requisition creates a Purchase Order.

Image
An electronic copy of an invoice or a document that has been scanned by Accounts Payable. From the Current Inbox you can click on the invoice number to view the invoice image online.

Imaging
Imaging is the ability to capture, store, retrieve, display, process, and manage business information in digital form. It allows viewing of PO invoices and documentation online.

PO Managers are able to respond electronically to the invoices in your Web Inbox from Accounts Payable placed on hold because of a problem with the purchase order/invoice matching process.

MarkView
The imaging system integrated with the BEN Pays function which allows users to ‘view’ and take ‘actions’ on scanned invoices.

Non-Imaged Documents
Travel documentation and PO supporting documentation (e.g. contracts, competitive bids)

PO Creator
The individual who originated the PO (Buyer) who is responsible for reviewing and responding to all POs placed on hold.

Transition
The process whereby an invoice on hold is moved from one queue to another, i.e. from MarkView to Accounts Payable. Only the ‘Resolve Holds’, ‘Route to Accounts Payable’ and ‘Return To’ Actions can be used to transition an invoice to Accounts Payable.

Invoice Hold
This is the hold placed on PO invoices for the following reasons Request Comment by Accounts Payable; Maximum Shipment Hold; Quantity Ordered Hold; and Quantity Received Hold.

Request Comment by Accounts Payable
Accounts Payable requires additional information or clarification.

Maximum Shipment Hold (MAX SHIPMENT)
Total invoice line amount > total PO line amount by $25 or more.

Quantity Ordered Hold (QTY ORD)
Quantity billed on invoice > 10% of quantity ordered on PO.

Quantity Received Hold (QTY REC)
Created when any invoice is received for a PO that exceeds $10,000 or the PO line has been marked ‘receipt required’ and no receipt has been entered in BEN Financials for items invoiced.
**Resolving Holds**

**Logon to MarkView Homepage**

If an invoice received by Accounts Payable is placed on ‘hold’, you will receive an e-mail message that contains the URL to access your BEN Pays Web Inbox.

Electronic notifications for the invoices on hold will be sent **daily**

- Click on the BEN Pays Web Inbox link from the e-mail

- Enter your **Username** and **Password**

  - Same as BEN Financials

- Click [OK]

**MarkView Home**

1. Go to your web inbox: **AP Invoices**, **Exception Documents**, **Supplier Documents**
2. Find invoices: **AP Invoices**

1. Click on **AP Invoices** here or on **Web Inbox** to begin to manage invoices on Hold
2. Click on **AP Invoices** here or on **Web Inquiry** to view invoices i.e. all scanned invoice images

From: Accounts Payable
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 log in 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 Managing Holds Quick Reference Guide or the Invoice Imaging (MarkView) User Guide. If you have additional questions please contact BEN Helps at 6-HELP (215-746-4357).
Resolving Holds (continued)

Web Inbox: Current Inbox Items

- Click on the **Go to your web inbox: AP Invoices** or **Web Inbox** to see the ‘Current Inbox Items’, i.e. invoices, awaiting your review

- Information shown includes:
  - Invoice Number
  - Supplier Name
  - PO Number
  - Invoice Date
  - Amount
  - Needs...
    - comment
    - purchasing resolution

- Click on the **Invoice Number** to open the invoice for review
Resolving Holds (continued)

MarkView Viewer

Upon clicking an invoice number, the screen below appears:

Features

1. **Document properties**: Provides information about the document displayed in the viewer, including document type, current queue, document name, and the Navigation tab selected.


3. **Actions**: Lets users move the invoice to another step in the workflow using:
   a. **Resolved Holds** – use to **Approve** payment of invoice with **Max Ship & Qty Ordered Holds** only
   b. **Route to Accounts Payable** – use to **Cancel** or **other reason**
   c. **Request Comment** – use when more information or clarification is needed

4. **Quick Info**: Contains comprehensive information about the document, such as PO line details and document history.

5. **Output**: Lets users email and print documents.

6. **Image area**: Lets users control the appearance of the viewer, such as changing the default zoom or using thumbnails to quickly move through multiple-page documents. Gives user the ability to undock and dock the Image View window. Additional Details contain comprehensive information about the document.

7. **Annotations**: Lets users highlight information and make notes.

8. **Document image**: Displays the captured image.

9. **Go To**: Lets users 'Return to Inbox', go to the 'Next' or 'Previous' invoice
Resolving Holds (continued)

MarkView Viewer (continued)

- Follow instructions in 'Quick Info' area
  - This area provides information on the invoice holds and instructions for how to handle the hold
  - Use the 'Quick Info Setting' to adjust the available options for viewing, sorting and/or hiding
- Use the Actions to transition the invoice to Accounts Payable
  - Resolve Holds - use to APPROVE payment for invoice with Max Ship Amount & Qty Ord holds
    - Comment box appears and reads: OK to Pay in accordance with University Policies.
  - Route to Accounts Payable – use to CANCEL an invoice or other reason
    - Comment box used to explain the reason for cancellation or other reason - read by Accounts Payable
- Use Annotations to add notes, text or highlight information
  - Yellow Highlight – for department use only
  - Blue Sticky Note - information note for department use only
  - Red Arrow – for department use only
  - Green Text - information note for department use only
- Use the Image area to see the following
  - Thumbnails, Zoom Out/In, Rotate Left/Right – to resize image
  - Page Overview - use to highlight and scroll over invoice
  - Options - customize the appearance of viewer toolbars and images
- Use Output to send an e-mail or print the document
  - Email – sends e-mail w/link or PDF of invoice image w/your comments for others to review
  - Print - directly print the image to your local printer
- Navigation includes the following:
  - Holds
  - PO Lines Details
  - Accounting
    - Includes account distribution information
  - Document History
  - Action History

Please Note: Only the Resolve Holds, Route to Accounts Payable and Return To Actions transition the Invoice to Accounts Payable.
Resolving Holds (continued)

The following are the more frequent activities performed in MarkView:

**Actions**

Actions are used to transition the invoice out of the Buyer’s Web Inbox

- **Resolve Holds**
  
  Use to approve an invoice for payment by releasing Max Ship Amount (Maximum Shipment Amount) and Qty Ord (Quantity Ordered) Holds.

- **Route To Accounts Payable**
  
  Use to send the invoice to Accounts Payable with instructions to cancel the invoice or other reason as explained in the comment box.

- **Request Comment**
  
  Used by Accounts Payable or Buyer when more information or clarification is needed.

- **Return To**
  
  Used to reply to ‘Request Comment’ from Accounts Payable.

**View**

- Use to customize the appearance/removal of the available Navigation options

- Use to show the original PO information together with the invoice matched information. Useful when determining the details of why an invoice is on Hold.

- Use to show a list of all actions. Also used to view the ‘Request Comment’ information entered by Accounts Payable.

- Use the green to highlight and scroll over invoice.

**Output**

- Use to e-mail or print documents
Resolving Holds (continued)

Actions

Resolve Holds

Use ‘Resolve Holds’ to approve an invoice for payment.

Scenario: Your supervisor asks you to order new chairs; one for the manager and three for the two of you and the other person in your office (total 4 chairs). You look through AOE’s catalog and find suitable chairs and create a PO for 3 desk chairs and 1 manager chair. Based on the information in the catalog, your PO has one line for $847.50 (3 chairs @282.50 each) and a second line for $345.30 (1 manager chair). The invoice is now on Hold because the price for the chairs is higher than the PO amount. You realize that the catalog was 2 years old and determine that the invoice is billed for the correct amount based on current prices.

Sample Max Ship Amount

Click on PO Line Details to view both Invoice and PO information

Click on Holds to view the Hold Lookup Code and Hold Reason

Use to move over the invoice as needed
Resolving Holds (continued)
Actions (continued)

Resolve Holds (continued)
To approve invoice for payment follow these steps:

- Click on ‘Resolve Holds’
  - Comment box reads **OK to Pay in accordance with University Policies.**
- Click [OK]
- This transitions the invoice back to Accounts Payable for payment

**Please Note:** Only the **Resolve Holds, Route to Accounts Payable** and **Return To** markups transition the Invoice to Accounts Payable and remove the item from the Web Inbox.

**Please Note:** Shipping and Handling added to an invoice by the Supplier will be paid by Accounts Payable automatically, i.e. these amounts will not place an invoice on Hold.
Resolving Holds (continued)

Actions (continued)

Route to Accounts Payable

Use ‘Route to Accounts Payable’ to cancel an invoice or other reason.

Scenario: Transfax Film Products seems to have double-billed you for an $856 fax machine. Checking your records, you find that only one fax machine was ordered and only one fax machine was received.

Sample Max Ship Amount & Qty Ord Hold

Important: You only need to respond once to this multiple holds scenario
Resolving Holds (continued)
Actions (continued)

Route to Accounts Payable (continued)

To request cancellation or other reason of an invoice follow these steps:

- Click on ’Route to Accounts Payable’
- Enter a reason for cancelling the invoice in Comments box
- Click [OK]

Accounts Payable will return invoice for comment if reason requires additional information

Note: An entire invoice is either approved or cancelled. Partial payment of an invoice is not permitted.

It is recommended to type ’Cancel invoice’ first then type the reason for the cancellation

Please Note: Only the Resolve Holds, Route to Accounts Payable and Return To markups transition the Invoice to Accounts Payable and remove the item from the Web Inbox.

Shipping and Handling added to an invoice by the Supplier will be paid by Accounts Payable automatically, i.e. these amounts will not place an invoice on Hold.
Resolving Holds (continued)
Actions (continued)

Request Comment by Accounts Payable

Used by Accounts Payable when more information or clarification is needed.

Scenario: For the Purchase Order to Life Fitness, the invoice has been placed on hold because a representative from Accounts Payable has sent you a MarkView message asking you a question. Respond to the message with ‘Return To’.

Sample Request Comment/Return To

Note the Action icons have changed
Resolving Holds (continued)

Actions (continued)

Return To

To respond to the ‘Request Comment’ Markup from Accounts Payable follow these steps:

- Click on ‘Return To’
- Enter a response in the Comments box
- Click [OK]

Please Note: Only the Resolve Holds, Route to Accounts Payable and Return To markups transition the Invoice to Accounts Payable and remove the item from the Web Inbox.
Resolving Holds (continued)

Quantity Received Hold (Qty Rec Hold)

When an invoice is placed on Qty Rec Hold, the following steps should be followed to either pay or not pay the invoice:

- To pay the invoice, log on to BEN Financials and follow the steps provided in the following user guides:
  - [https://www.finance.upenn.edu/financial-training/requisitioner-user-guide](https://www.finance.upenn.edu/financial-training/requisitioner-user-guide)
- To cancel the invoice, click on 'Route to Accounts Payable' with the reason for the cancellation.

If there are multiple Holds on the invoice, e.g., Max Ship Amount and Qty Rec, and you want to pay the invoice, click on the Resolve Holds for the Max Ship Amount and enter the receipt in BEN Financials for the appropriate amount.

Click on PO Line Details to view both Invoice and PO information. Scroll to the right to see Quantity Ordered, Quantity Received, and Quantity Billed.
Resolving Holds (continued)

PO Hold Resolution Grid

<table>
<thead>
<tr>
<th>Hold Type</th>
<th>Approve Invoice</th>
<th>Cancel Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity Ordered Hold (Qty Ord)</td>
<td>Click on ‘Resolve Holds’. <strong>Please do not type anything in the Comments box.</strong></td>
<td>Click on ‘Return to Accounts Payable’ with the reason for cancellation in the comment box.</td>
</tr>
<tr>
<td>Maximum Shipment Hold (Max Ship Amount)</td>
<td>Click on ‘Resolve Holds’. <strong>Please do not type anything in the Comments box.</strong></td>
<td></td>
</tr>
<tr>
<td>Quantity Receipt Hold (Qty Rec)</td>
<td>Log on to BEN Financials and process receipts via Requisitioner or PO Manager Responsibility. No further action is needed. <strong>Please do not use the ‘Holds Resolved’ or ‘Route to Accounts Payable’ to indicate ‘OK to pay’. These will not remove the Hold.</strong></td>
<td>Important! Please do not click on ‘Resolve Holds’.</td>
</tr>
<tr>
<td>Multiple Holds</td>
<td>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</td>
<td></td>
</tr>
<tr>
<td>Request Comment (170_SYSTEMS_HOLD)</td>
<td>Review message sent by Accounts Payable in the Quick Info section. Read the comment and click on ‘Return To’ with information requested.</td>
<td></td>
</tr>
</tbody>
</table>
View

There are a variety of ways to view the image. Use the options displayed to increase, reduce and/or rotate an image.

Navigation Pane

The Navigation pane appears on the left in MarkView Viewer and it is separated from the detail section by a splitter bar.

- You can resize the Navigation pane. **The viewer automatically saves all size changes for your account.**
- To collapse or expand the Navigation pane:
  - Drag the splitter bar left or right
  - Click the Expand and Collapse controls
  - Double-click the splitter bar

Image Area

The image area appears on the right in MarkView Viewer. The area is separated from the detail section by a splitter bar. The same resizing information applies to the Image Area as the Navigation Pane.

Additional features include:

1. Zoom functions—Zoom in and out
2. Rotation functions—Rotate the image in 90-degree increments
3. Navigation between pages: Click buttons to open next or previous page of a document.
4. Thumbnail icon—Move through multi-page documents
5. Green image —Focus on a particular part of an image
6. Undock Image [Shift] U – Opens the image in another window. Click on Dock Image [Shift] D at the bottom of the original window to re-dock the image.
7. Annotations available

For additional information on this and other topics, click on the upper right-hand side of the screen.
E-mail
Use this to send an e-mail with your comments together with a link or PDF of the MarkView invoice image for others to review.

Reviewer CANNOT apply Markups used for transitioning invoice to Accounts Payable, i.e. Resolve Holds, Route to Accounts Payable or Return To
Reviewer can apply Annotations, i.e. Yellow Highlight, etc.

To begin sending E-mail:
- Click on To...
- Type in the last name of the contact desired, e.g. dilossi in the Filter Criteria field
- Wait for name(s)/email(s) to load
- Click on the desired name; click on To->
- Click [OK]
- Select a Delivery Option
  - Document Link - sends an email containing a link to the document in MarkView
  - PDF Attachment (default) - generates and sends an email with a PDF of the document attached
  - Page Range - the default minimum is 1; the default maximum is the total number of pages in the document
- Select Annotations (Optional)
- Select Detail Sections: (Optional)
  - Click on [Select…]
  - Check applicable Sections
- Click [OK]

Print
Use this to print an image currently on the screen.
To begin printing:
- Enter a Page Range – the default minimum is 1
  The default maximum is the total number of pages in the document
- Select Details Sections: (Optional)
- Click [OK]
Request Comment by User

Within MarkView, the Buyer has the ability to send invoices on hold to any active PO Manager requesting review and/or comment. The person to whom the invoice has been sent responds back to the Buyer with their comments using the 'Return To' Action in MarkView. From here, the Buyer’s ‘next step’ is to request that the hold(s) be released or invoice cancelled based on the MarkView training and/or documentation.

Please Note - This functionality doesn’t allow the user, receiving this invoice for comment, the ability to use the ‘Resolve Holds’ or ‘Route to Accounts Payable’ actions in MarkView. Only the ‘Return To’ action can be selected.

- From the MarkView Web Inbox select the invoice on hold to view

  - The image is opened and the Request Comment Action is available

  - Click on 'Request Comment'

  - Enter in the PO Manager’s Contact name and enter Comments

  - Click [OK] to send the invoice with comments to the Contact entered

- The invoice is now in the selected PO Manager’s BEN Pays/MarkView Web Inbox
Request Comment by User (continued)

- After opening the image the PO Manager can respond by selecting the ‘Return To’ Action and entering the appropriate comments.

- Click [OK]

Please Note – Recall and Re-Route actions are visible but are not allowed to be used by the name entered in ‘Contact’. The Contact can only use the Return To action with their comments. Below are the error messages that appear:

My Comment Requests

The Buyer can view all invoices which are sent out for ‘Request Comment’ from your Current Inbox Items list.

- Click on ‘My Comment Requests’

Recall Invoice Sent Out for Comment

- The Buyer has the ability to ‘Recall’ any invoices you sent out for ‘Request Comment’

- Click in the box next ‘Recall Selected’

- Click on [Recall Selected]

- You will receive a message that you recalled the item from Comment Request.
Re-Route Invoice to Another PO Manager

- In addition, the Buyer has the ability to ‘Re-Route’ the invoice to another PO Manager
- Click on ‘My Comment Requests’ from your Current Inbox Items list
- Click on the invoice Description which will bring up the invoice image

- The ‘Re-Route’ action available for use

- Click on ‘Re-Route’
- Enter the Contact and Comments
- Click [OK] and the invoice has been re-routed to another user

- You will receive a message that you successfully sent the item for Comment Request.
Web Inquiry

Use Web Inquiry to view invoices associated with a purchase order. Querying by PO Number returns all the invoices and credit memos matched to the PO.  

Does not include EDI credit memos

- From the MarkView Home page, click on Find Invoices: AP Invoices or Web Inquiry

Select from either the [Basic] or [Advanced] Web Inquiry

- Enter the search criteria
- Click on [Submit]

Basic Web Inquiry

Advanced Web Inquiry
View Invoice Images from BEN Financials

There are three responsibilities from which to view images of invoices

- PO Manager or
- GL Inquiry (Secured)
- Invoice Inquiry

For information on viewing invoices the following user guides are available under Documentation on the Financial Training Department websites https://www.finance.upenn.edu/financial-training-department

- PO Manager User Guide
- GL Inquiry User Guide
- Invoice Inquiry User Guide

*For Requisitioners Only, use the separate Invoice Inquiry Responsibility and the corresponding Invoice Inquiry User Guide*
# Revision History

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<th>Page Number(s)</th>
<th>Topic</th>
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<td>Various</td>
<td>R12 BEN Financials Upgrade</td>
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<td>December 9, 2013 (BAM)</td>
<td>Various</td>
<td>MarkView Upgrade and PDA Forms (formerly C-Forms)</td>
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<td>Added text box regarding Quantity Receipt Hold</td>
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<td>August 31, 2015 (BAM)</td>
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<td>Updated the Hold Resolution Grid</td>
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<td>June 30, 2016 (BDL)</td>
<td>Pages 5, 6</td>
<td>Removed ‘BEN Reports’ reference; no longer exists</td>
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<td>May 31, 2018 (BDL)</td>
<td>Various</td>
<td>Reviewed and updated various web links; removed PDA form references</td>
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<tr>
<td>September 5, 2018 (BDL)</td>
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<td>Removed AP email address w/‘exchange’ from screen</td>
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<td>December 20, 2019 (BDL)</td>
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<td>Updated Receive Hold criteria from $5,000 to $10,000</td>
</tr>
<tr>
<td>April 13, 2020 (BDL)</td>
<td>Various</td>
<td>MarkView Upgrade 2020</td>
</tr>
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