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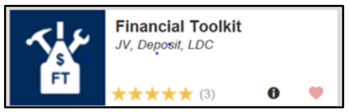
ACCESS ONLINE PAYMENT (USING GOOGLE CHROME)

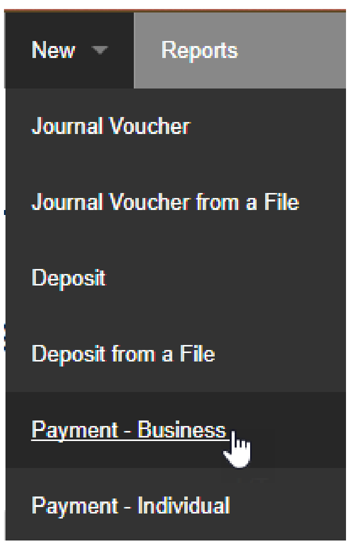
1. Go to insideND
2. From the search box enter **Payment**
3. Click Financial Toolkit icon



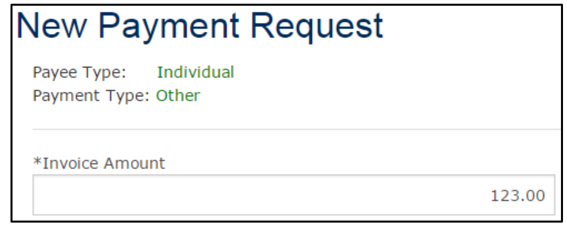
SUBMIT A PAYMENT REQUEST

To create a payment request based off an existing request, see the **Clone a Payment Request** section (page 4). Only one invoice can be submitted per request. The cloning feature should be used to facilitate entry of multiple invoices for the same business.

1. Click **New** then select **Payment – Business**.

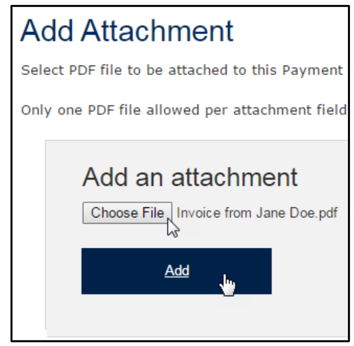


2. Enter the invoice amount in the appropriate box.



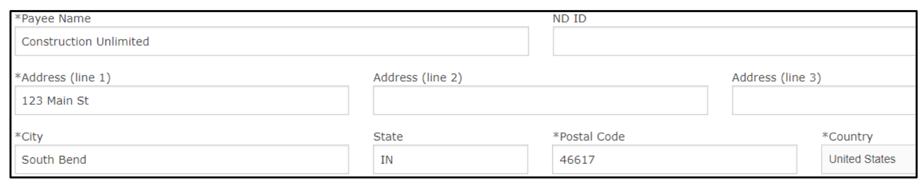
3. Click the paperclip icon to open the attachment dialog box.

4. In the *Add Attachment* dialog box, click on **Choose File** and select the invoice PDF. Click **Add**.

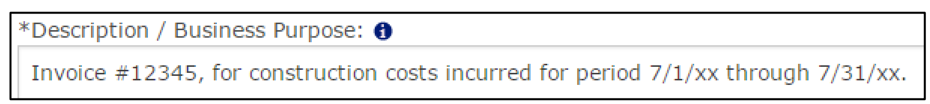


Note: Attachments can be removed by clicking the red X to the right of the attachment name.

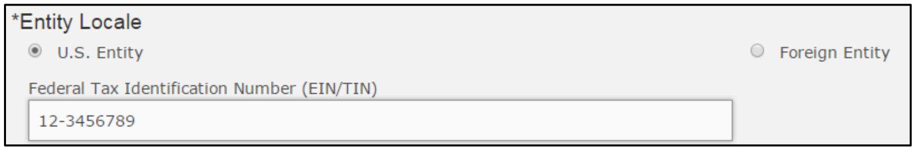
5. Enter the payee details.



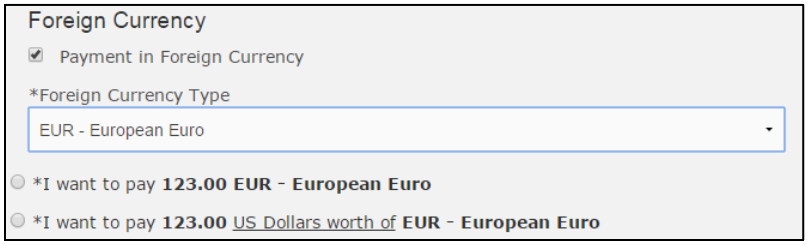
6. In the **Description/Business Purpose** box, describe the payment. For travel/entertainment expenses, the who, what, where, when, and why should be documented.



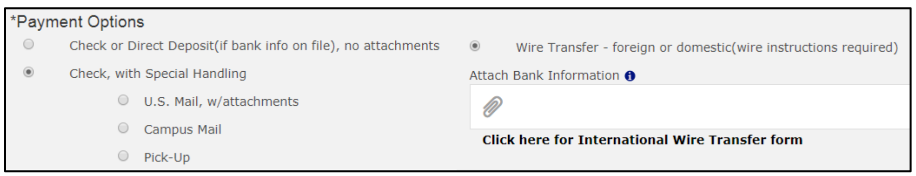
7. Ensure that the correct **Entity** Locale radio button is marked. If there is a Federal Tax ID Number, fill it in now.



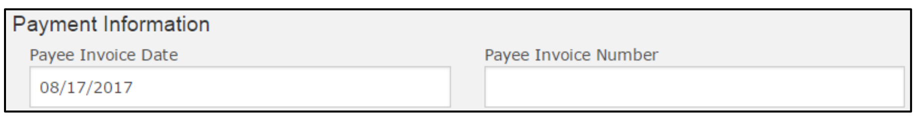
8. If the payment is to be made in a foreign currency, mark the checkbox and select the currency to be used. Mark the radio button for either a straight payment or a payment converted from US dollars.



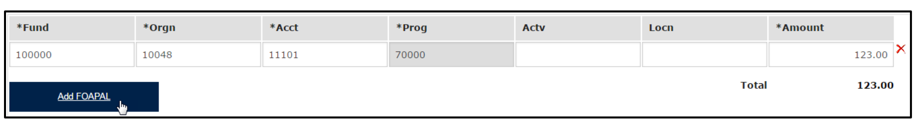
9. Mark the radio button for the correct payment type. Marking **Check, with Special Handling** will reveal three additional check options as shown below. If the payment is a Wire Transfer, you will need to provide bank account information by clicking on either the paperclip to provide an attachment or the Wire Transfer form link.



10. Fill in the **Payee Invoice Date** and/or **Payee Invoice Number**, if applicable.

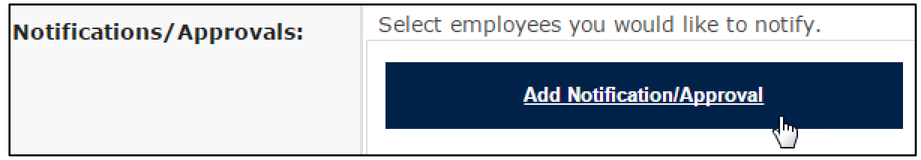


11. Fill in the FOAPAL information for the payment. If applicable, click the **Add FOAPAL** button to split the payment.

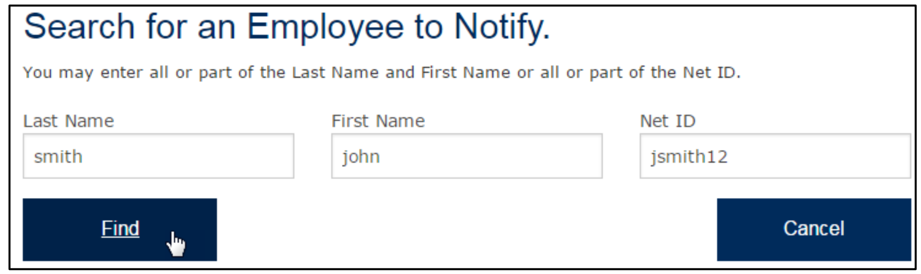


12. To send a notification or approval request, click the **Add Notification/Approval** button to open a search dialog box. Note that requests sent for approval will not move forward until they are approved.

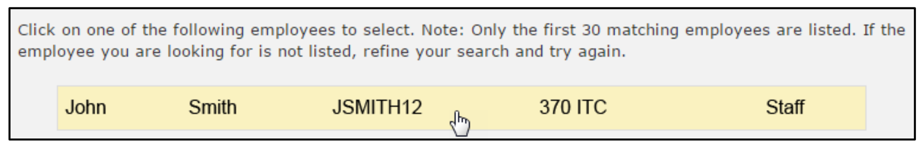
Note: If you want to set up default approver(s)/notifier(s), see the section **Set Up a Default Approver and/or Notifier**.



13. Enter the **Last Name**, **First Name**, and/or **Net ID** of the person you would like to notify or request approval from and click **Find**.



14. Click on the name of the employee you would like notify or request approval from.



15. Mark the correct radio button for either approval or notification. If applicable, add any comments in the **Email Comments** box.

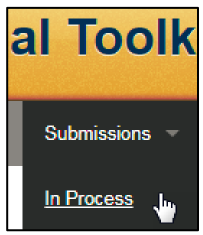
16. If applicable, add any additional comments about the request in the **Comments** box.

17. If you wish to save your request without moving it forward, click the **Save** button. Your payment will be accessible from the menu bar under the **Submissions in Progress** list.
18. Click the **Review Form** button to see a summary of your request.

19. Review the payment request. If necessary, click the **Edit Form** button to return to the previous screen and change any details. Once you have reviewed the request, click **Submit**.

VIEW PAYMENT REQUESTS

Click on the **In Process** button in the top left or **Submissions > In Process** to view the status of any requests you have made or have been submitted to you for approval.

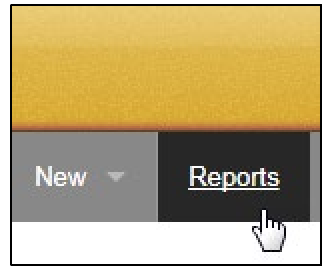


SEARCH PAYMENT REQUESTS

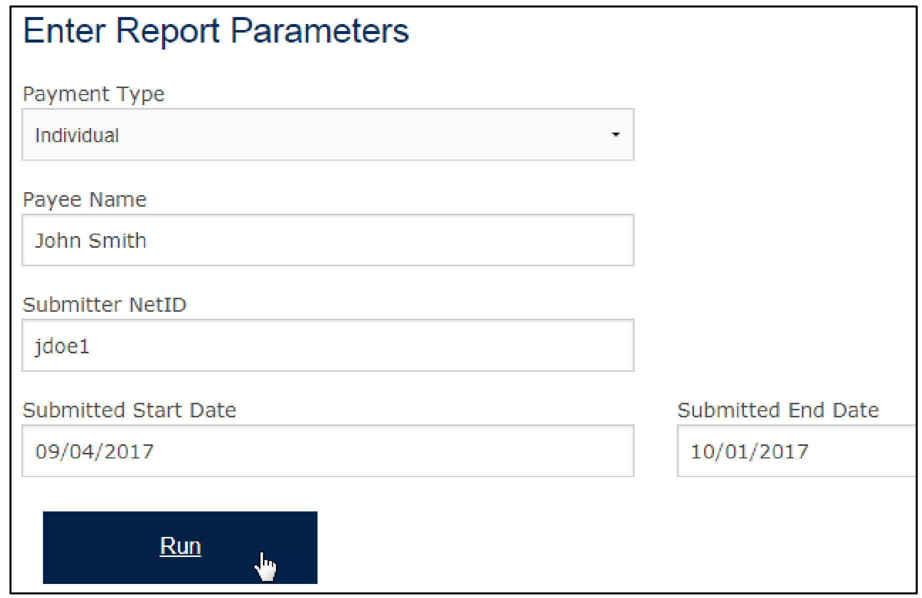
To search by *Transaction #, payee name,* or *Banner TK #*, type in the search box to the right of the top toolbar and click the search icon.

RUN A REPORT OF PAYMENT REQUESTS

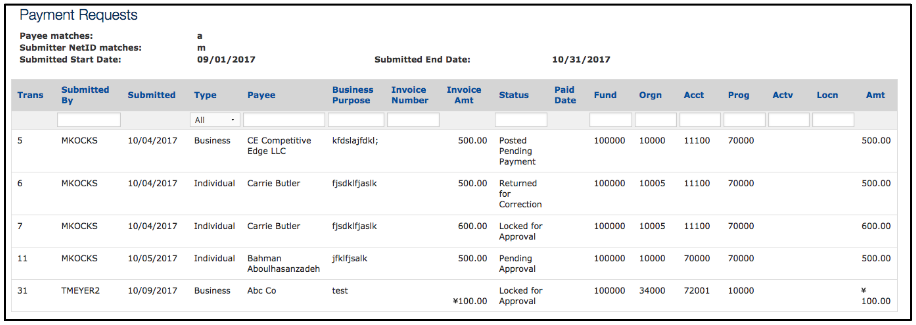
1. Click on the **Reports** button in the top ribbon to view available reports.



2. Click on **Payment Requests**.
3. Fill in details about the requests you are looking to find with this report and click **Run**.



4. You can sort by clicking on any column, filter by entering a value in first row of boxes, or simply open any of the payment requests.



Payment Requests

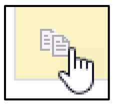
Payee matches: a
Submitter NetID matches: m
Submitted Start Date: 09/01/2017 **Submitted End Date:** 10/31/2017

Trans	Submitted By	Submitted	Type	Payee	Business Purpose	Invoice Number	Invoice Amt	Status	Paid Date	Fund	Orgn	Acct	Prog	Actv	Locn	Amt
			All													
5	MKOCKS	10/04/2017	Business	CE Competitive Edge LLC	kfdslajfdkl;		500.00	Posted Pending Payment		100000	10000	11100	70000			500.00
6	MKOCKS	10/04/2017	Individual	Carrie Butler	fjsdklfjaslk		500.00	Returned for Correction		100000	10005	11100	70000			500.00
7	MKOCKS	10/04/2017	Individual	Carrie Butler	fjsdklfjaslk		600.00	Locked for Approval		100000	10005	11100	70000			600.00
11	MKOCKS	10/05/2017	Individual	Bahman Aboulhasanzadeh	jfklfjsalk		500.00	Pending Approval		100000	10000	70000	70000			500.00
31	TMEYER2	10/09/2017	Business	Abc Co	test		¥100.00	Locked for Approval		100000	34000	72001	10000			¥ 100.00

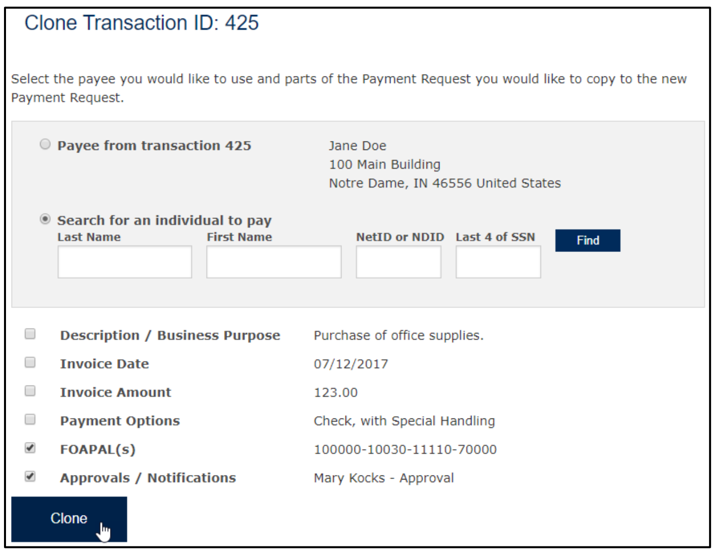
CLONE A PAYMENT REQUEST

See the previous **View Payment Requests** section or **Search Payment Requests** section to find the request you would like to clone items from.

1. Click on the clone icon to the left of the *Transaction #*.



2. Mark the checkboxes of the items you would like to clone to the new payment request. You can search for a new payee from within this form. When finished, click **Clone**.



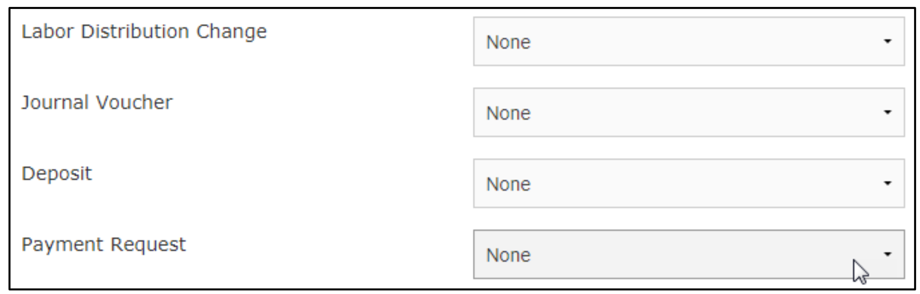
3. Fill in the remaining fields and submit the payment request as normal (see **Submit a Payment Request** section).

SET UP A DEFAULT APPROVER AND/OR NOTIFIER

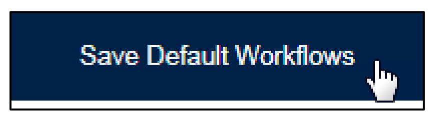
This section shows you how to set up one or more default approvers and/or notifiers so that you don't have to add them to every payment.

1. Click the gear in the menu bar (next to the *Search* box).

2. Click **Add Default Workflow**.
3. Enter the last name, first name, and/or netID of the person you would like to add as a default approver/notifier.
4. Click **Find**.
5. Select the correct individual from the list.
   Note: the list will only display the top 30 results. If the name you are looking for did not appear, refine your search.
6. Click the dropdown next to **Payment Request**.



7. Select the type of notification or approval that you would like this individual to have.
8. Click **Save Default Workflows**.



These settings can always be adjusted by clicking on the gear icon.