

### Acumatica Bill (Invoice) Entry flow:

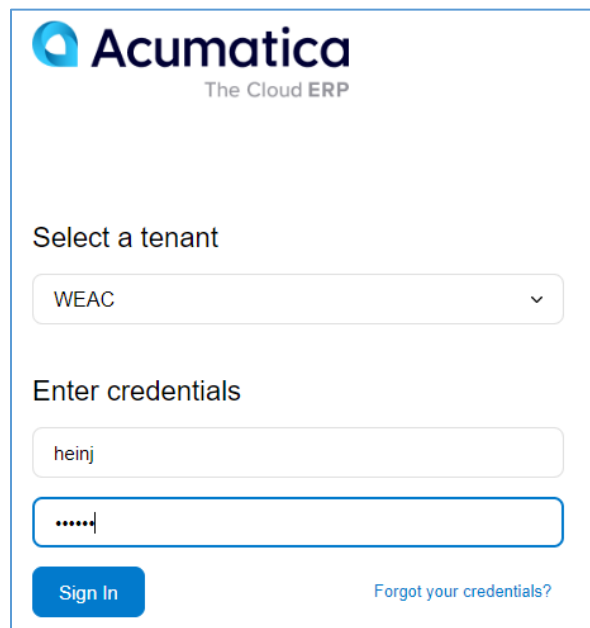
1. Staff Enters the bill into Acumatica
2. Staff submits the bill and an Email is sent to your Accounting Associate for review. All bills will have a two-step review process. It will first be reviewed by your Accounting Associate and then it will be approved by your manager/supervisor.
3. Accounting Associate reviews, edits and forwards the bill to your manager/supervisor. The manager/supervisor receives an Email notification that the bill is waiting for approval.
4. Approver reviews and approves or rejects the bill for payment.
5. Accounting Associate releases and prepares bills to be paid.
6. Check/ACH staff complete the payment.

### Login to Acumatica

1. Open the URL [weac.acumatica.com](http://weac.acumatica.com)
2. Make sure to select "WEAC" for the tenant
3. Enter your credentials:

Username: lastname + first initial

Password: A temporary password will be supplied at training. You will be prompted to change your password the first time you login.



Acumatica  
The Cloud ERP

Select a tenant

WEAC

Enter credentials

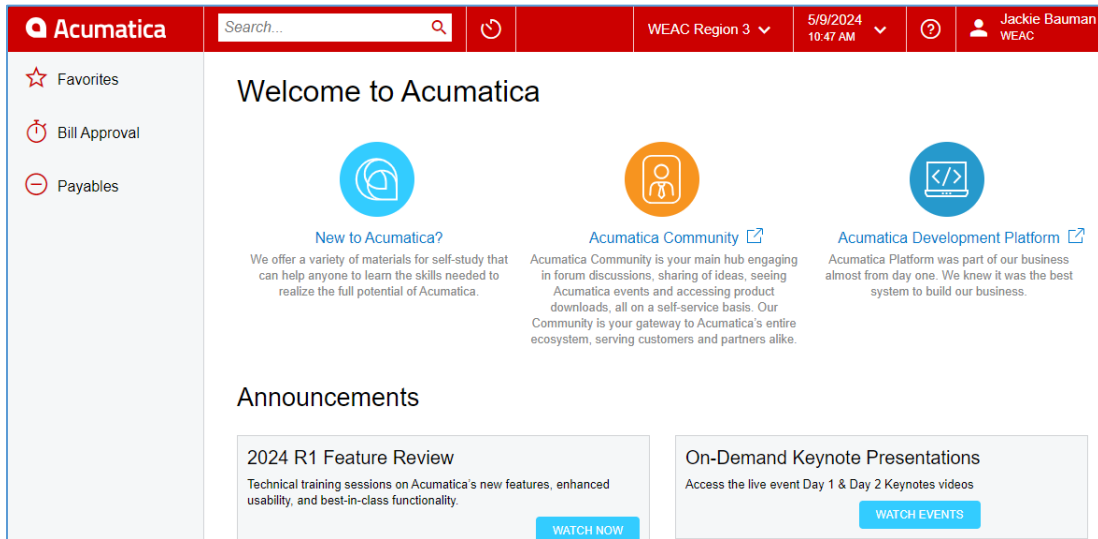
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Sign In

[Forgot your credentials?](#)

## Acumatica Navigation



### Top Menu:

#### Company Branch:

You can easily change the Company/Branch using the down carat next to the branch name. You will only see the branch(es) you have access to.

#### User Profile

To access your profile use the down carat next to your name and select the "MY PROFILE" link. You can change your password and other settings in your Profile.

### Left Menu:

You will only see items that you have permission to use on the left menu.

#### Favorites

Tasks you have marked as a favorite will be listed on the "Favorites" tab.

#### Bill Approvals

The "Bill Approvals" tab will only be available to users who approve bills.

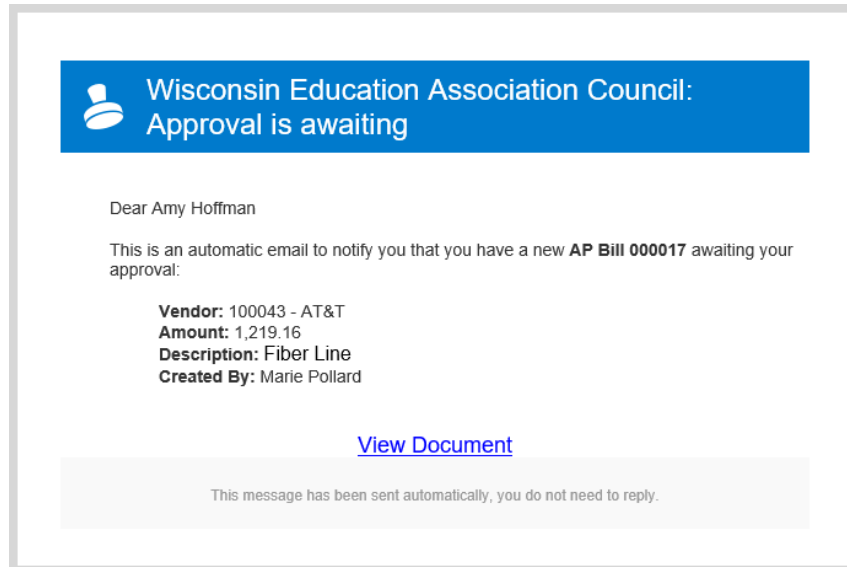
#### Payables

The "Payables" tab will only be available to users who enter bills and users who approve bills.

## Review Bill (Approve/Reject) – Web app

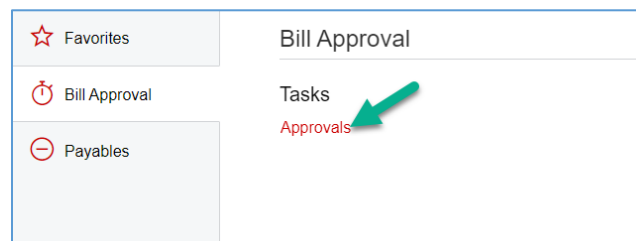
1. When a bill has been submitted for your approval, you will receive an Email like the following image.

NOTE: The emails come from WEAC Admin, [weacadmin@weac.org](mailto:weacadmin@weac.org). If the Emails end up in your spam/junk folder, you might need to update your email client settings.



2. You can either click the *View Document* link in the Email to go to the bill for further review or you can login to Acumatica and navigate to the *Approvals* screen by selecting *Bill Approval* from the left navigation and selecting the *Approvals* link.

Note: If you click the link on your mobile device, it will open Acumatica in the default web browser. You will be able to approve from your mobile web browser.



Approvals

APPROVE APPROVE ALL REJECT

ALL RECORDS REASSIGNED

Reference Nbr.	Owner	Document Date	Account Name	Description	Total Amount
000054	Susan Claus	5/1/2024	Ez Office Products	General office supplies	55.00
000053	Marie Pollard	4/26/2024	Marco Inc	Copier Lease/Maintenance	621.87

3. Review the bill(s) on the Approvals screen.

**Review Bill:** If you would like to review the bill details, double click on the *Reference Number* for the bill. If there are notes

**Attachments:** To view attachments, you will need to double click on the bill to see the details and click on the attachment icon (paperclip icon).

**Approve:** To approve bills, select the checkbox for each bill you want to approve and click the *Approve* button at the top of the list.

**Reject:** To reject bills, select the checkbox for each bill you want to reject and click the *Reject* button at the top of the list. If you reject a bill, make sure to click on the note icon to the left of the bill and enter the reason for the rejection.

**Approve All:** If you want to approve all of the bills listed, click the *Approve All* button at the bottom of the list.

4. If you selected a bill view the details you will see the following screen. You can approve or reject the bill from this screen using the *Approve* and *Reject* buttons at the top of the screen.

The screenshot displays the 'Bills and Adjustments' interface for 'Bill 000054 - Ez Office Products'. At the top, there are navigation icons and buttons for 'APPROVE' and 'REJECT'. The main area is divided into two columns of details:

Type: Bill	Vendor: 100079 - Ez Office Products	Detail Total: 55.00
Reference Nbr.: 000054	Location: MAIN - Primary Location	Line Discounts: 0.00
Status: Pending Appr...	Terms: DUR - Due Upon Receipt	Document Discou...: 0.00
Date: 5/1/2024	Due Date: 5/1/2024	Tax Total: 0.00
Post Period: 09-2024	Cash Discount...: 5/1/2024	With. Tax: 0.00
Vendor Ref.: 859865		Balance: 55.00
Description: General office supplies		Cash Discount: 0.00

Below the details are tabs for 'DETAILS', 'FINANCIAL', 'TAXES', 'APPROVALS', and 'APPLICATIONS'. A toolbar with various icons is located above the line item table.

Branch	Transaction Descr.	Quantity	Unit Cost	Ext. Cost	Amount	Account	Description	Subaccount
WR3	Legal Pads	1.00	55.0000	55.00	55.00	5048	Office Supplies	000-0066-0000

**Attachments:** To view attachments, click on the attachment icon (paperclip icon) to the left of the line item detail.

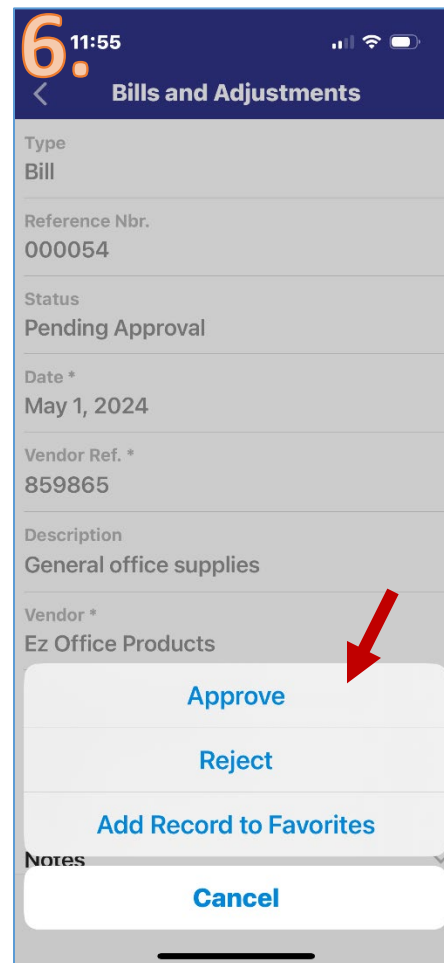
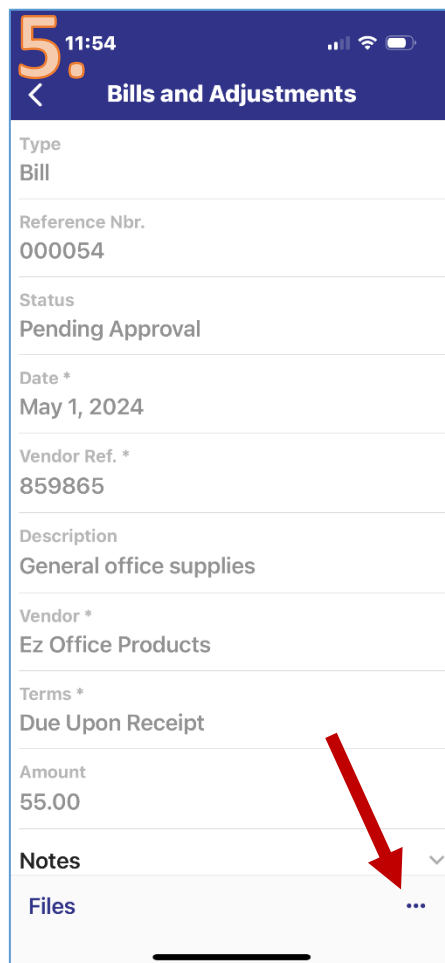
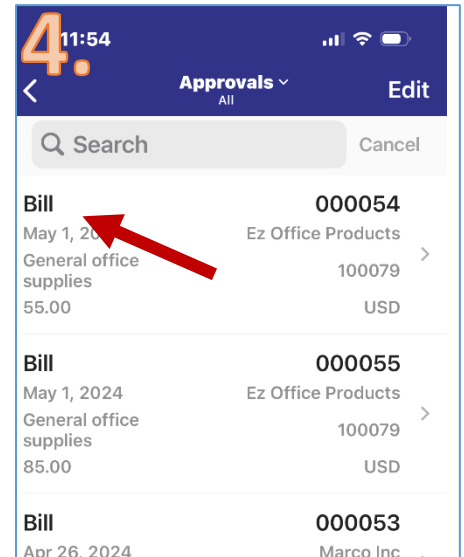
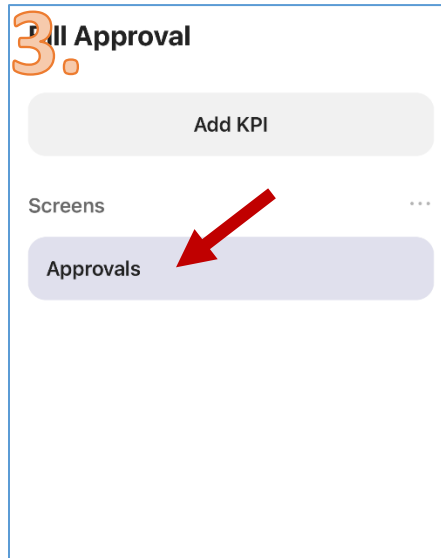
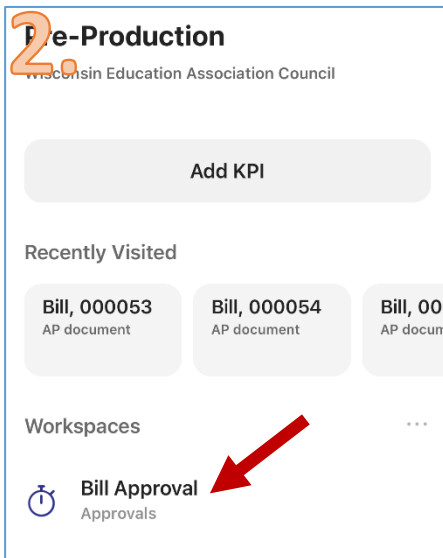
**Approvals:** The approvals tab will show the approval path of the bill

**Approve:** Use the Approve button to approve the bill.

**Reject:** Use the Reject button to reject the bill.

## Review Bill (Approve/Reject) – Mobile App

1. Open the Acumatica Mobile App (instructions are on the last page of this document)
2. Click on the *Bill Approval* link to open the *Bill Approval* screen
3. Click on the *Approvals* link to view the list of bills awaiting approval.
4. Click on the bill you want to review, approve or reject.
5. After reviewing the bill, click on the ellipsis (three dots) to expand the approval menu
6. Select *Approve* or *Reject* to process the bill.



## Install Acumatica Mobile App

1. Install the Acumatica Mobile App onto your mobile device
2. Open the Acumatica app. When prompted for the *Server* settings enter the settings shown in the first image below and click the *Next* button.
3. The second image below shows the home screen for the Mobile App.

*Note: The “Pre-Production” title will be “WEAC” under your login.*

