Advanced miViewPoint

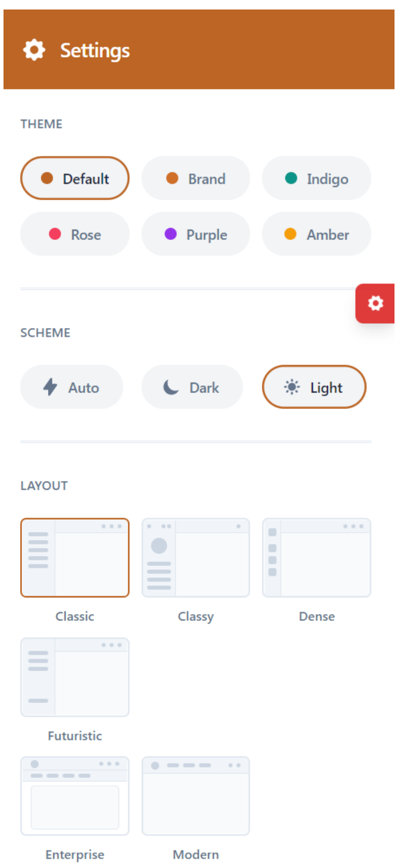
Customization

There are many ways to customize the miViewPoint site to a user's individual liking.

Site Look and Feel

The entire site can be changed to a user's color preference and menu preference. This is done using the spinning sprocket on the right side of the screen 

Users are given the option to change their color scheme as well as their menu layout. They can use the default vertical layout or if they have a small screen, they may prefer a horizontal layout with the menu along the top of the screen. These settings are saved per user.



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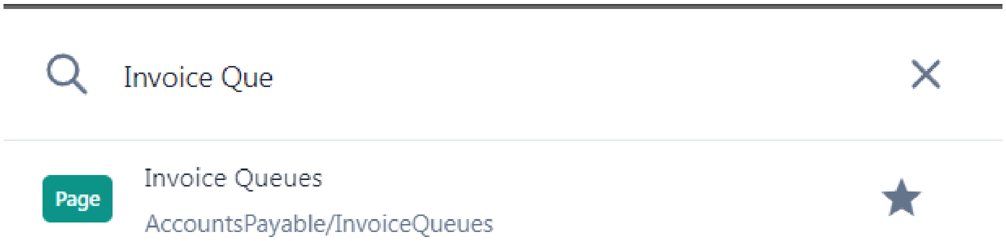
Shortcuts

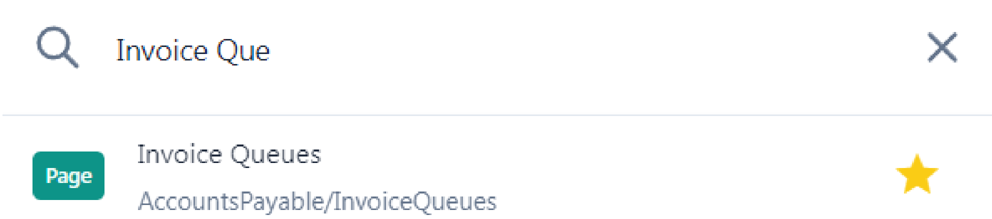
Once logged in, users can create shortcuts to their favorite pages using the search icon to find the page and then the bookmark icon on the toolbar to go to those pages .

To create a Shortcut, follow these steps:

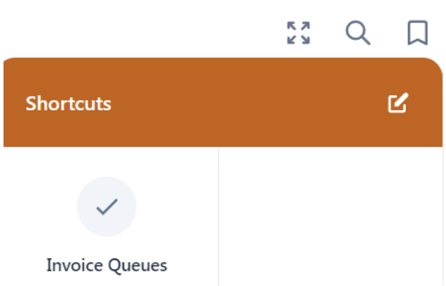
1. Click the search button to find the page you would like to make a favorite
2. Enter your search text.



3. Click the star to make it a favorite.



4. To access those shortcuts, click the bookmark icon to find your favorites and click to go there.



5. The edit icon in the upper right corner can be used to remove a favorite.

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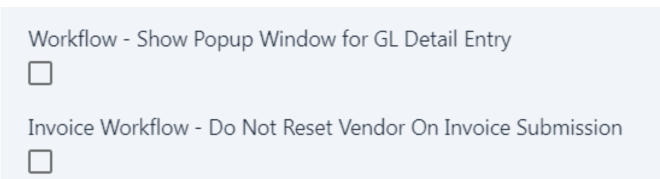
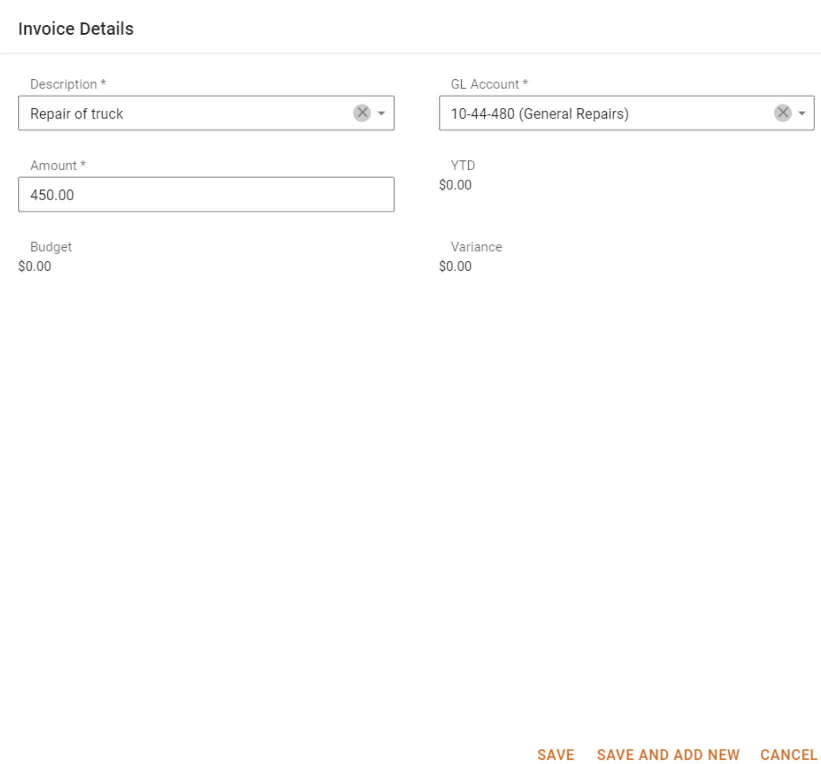
GL Coding Popup

Users can change their workflow preferences on their profile page by clicking the person icon in the upper right corner .

Users are given options to show a popup for detail entry on invoices / purchase orders and whether to reset the vendor when entering.



If the user chooses to use the popup window for GL Detail Entry they have further customization available. They can customize the fields/order by changing the associated grid columns.

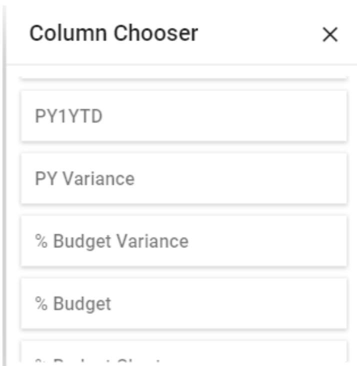


By using the arrows that appear they can also resize the popup size to be bigger or smaller as may be desired .

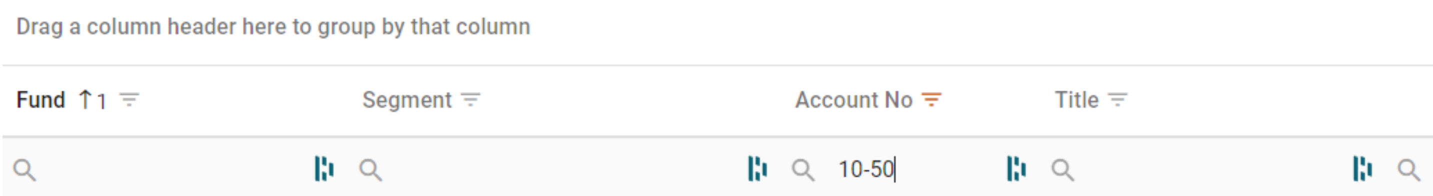
Column Chooser

Throughout the entire system, grids are customizable for each user individually. Users can make the system their own by adjusting to what they find most beneficial. This is done via the column chooser in the upper right.

corner of each grid . When this is selected users can add/remove columns to fit their needs.



In addition, filters are sticky on most grids, so they can save a filter to customize even further.



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Invoice Parsing

The ability to have the system parse information from the scanned invoice is now available. The parsing will try and find the following fields:

- Vendor Name
- Invoice Number
- Invoice Date
- Total Amount
- Detail Lines

To utilize, follow these steps:

1. Make sure that an invoice appears in the preview window to the right.
2. Click the **Parse Attachment** button.

3. A message will appear letting you know that any existing data entry that may have been entered is going to overwritten. Click **OK** to continue.

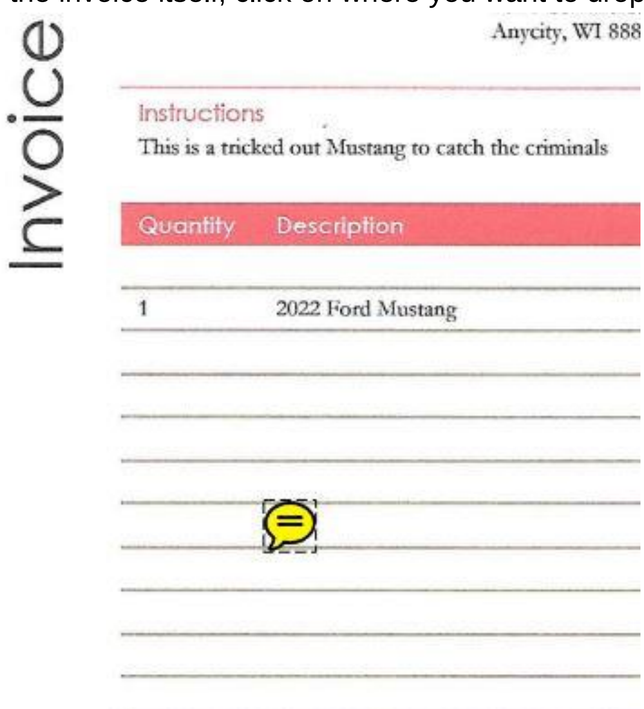
Adding an Annotation/Comment

A new viewer was put into place to provide the ability to enter an annotation/comment. These will then be visible for other users in the approval process.

To add an annotation/comment, follow these steps:

1. In the invoice window, click on the **Add Comment** button on the toolbar.

2. On the invoice itself, click on where you want to drop the comment.



3. Double-click on the yellow comment to type the comment you want to add.

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Adding a Fixed Asset

As fixed assets are entered through invoice workflow, the system can send that fixed asset to Asset Management as a pending asset.

To get this setup, follow these steps:

1. In Connect, go to **Asset Management | Organization | Organization**.
2. Enter your capitalization threshold in the **Capitalization threshold** field (e.g. $5,000)
3. Exit this screen.
4. Go to **General Ledger | Organization | Chart of Accounts**.
5. Navigate to an account that fixed assets are typically coded to. For example, a fixed asset or capital outlay account.
6. Check the **Prompt for fixed asset information** checkbox.

Once setup, a prompt will appear in invoice entry when an invoice is over the capitalization threshold and you are coding the invoice to a fixed asset or capital outlay account.

You can enter as much or as little information on this screen. Clicking **Save** will send the asset to the **Pending Assets** in **Asset Management**.

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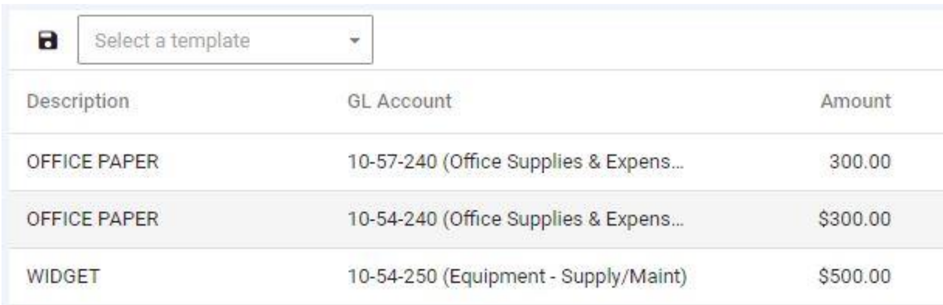
Creating Coding Templates

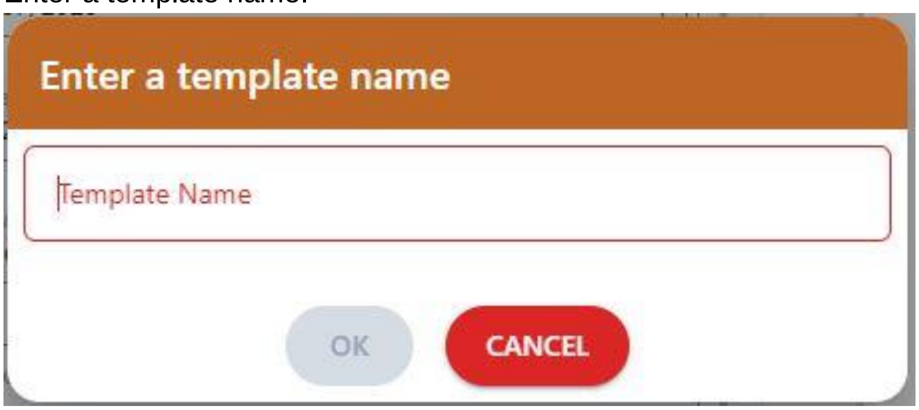
You can create coding templates to more quickly code invoices that consistently utilize the same account numbers.

To create a coding template, follow these steps:

1. Code an invoice that you want to save.



2. When ready, click the **Save coding template** button next to the **Select a template** field.
3. Enter a template name.



4. Click **OK**.

To utilize this template again, follow these steps:

1. In the coding section of the invoice entry screen, click on the **Select a template** drop-down field.
2. Select the template you would like to utilize.

To only see templates that you have created, follow these steps:

1. In the coding section of the invoice entry screen, click on the **Select a template** drop-down field.
2. Under **User**, click in the filter field.

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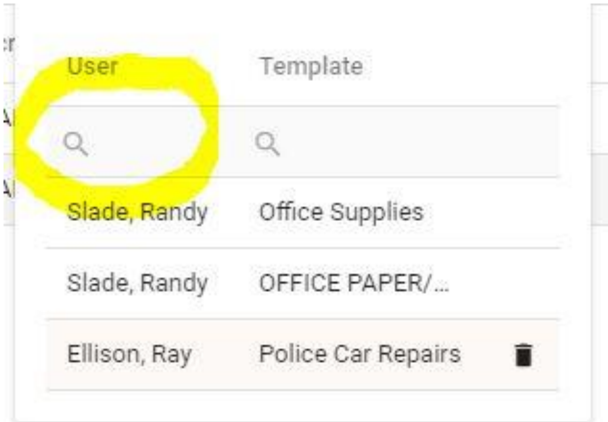
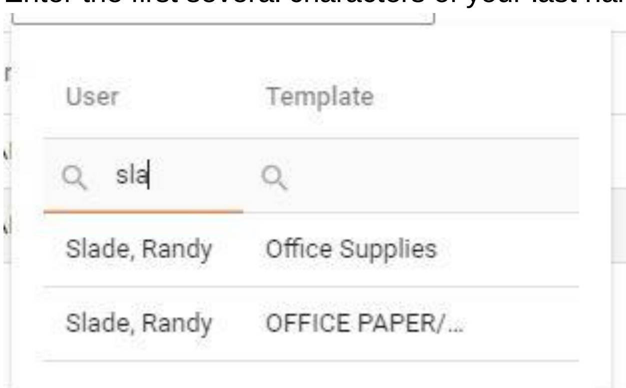


3. Enter the first several characters of your last name until the list only shows your templates.



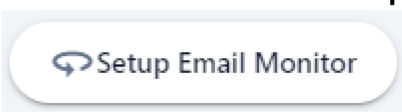
This filter will save and the next time you come to this drop-down, you will only see your templates.

Invoice Email Monitoring

If you have a dedicated email that vendors use to send invoices, you can use setup this email to be monitored by miViewPoint. When an invoice is received to this address, the invoice will then be saved into miViewPoint….

To setup the email monitoring, follow these steps:

1. In miViewPoint, go to **Administration | Organization | Workflows**.
2. Scroll down and click on **Setup Email Monitor** on right side of screen.



3. Most likely you email address will appear on the next screen that opens. Click on **Sign in with another account**.
4. Click through the next prompts appropriately until you are able to enter the email address and password for that account.
5. Once done, you will see a message that says, "*Authorized successfully. You can now close this tab*". Close the tab to return to miViewPoint.

   You should see the email address filled in the **Email Monitoring Address** field.

6. Click the **Send All Attachments to Attachment Grab** checkbox if you would like attachments to be sent there.

   Leaving this checkbox unchecked will send the attachments to your queue in **Invoice Entry** if you are the one that sent the invoice to the monitoring email address. If a vendor sends an invoice to this email, the invoice can be found in **Attachment Grab**.

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