



OPENINVOICE ACCOUNT PURCHASE ORDER CONFIGURATION





OI ACCOUNT PO CONFIGURATION

How to configure OpenInvoice accounts for Purchase Orders:

1) Log into your OpenInvoice account and go to your preferences:

The screenshot shows the OpenInvoice dashboard for 'Gibson Energy Test Supplier'. The top navigation bar includes 'Menu', 'OpenInvoice', and 'Gibson Energy Test Supplier'. A search bar for 'Invoice #' is visible. The main content area is titled 'Home' and features a section 'Invoices Requiring My Attention'. This section displays two columns: 'Saved' with a count of 2 and a total value of CAD 105.00, and 'All Disputed' with a count of 2 and a total value of CAD 1,415.00. To the right, there is a promotional banner for 'Save Time and Reduce Errors' with a 'Learn More...' button. A user profile dropdown for 'Kevin Lay' is open, showing a 'Preferences' option.

2) Click on summary:

The screenshot shows the 'My Profile' page in OpenInvoice. The top navigation bar includes 'OpenInvoice' and several icons. The 'My Profile' section is highlighted. A yellow banner indicates 'This user currently has 26 outstanding invoices'. Below this, the user profile is identified as 'User Profile: Lay, Kevin'. A tabbed interface is shown with 'Summary' selected. The 'Summary' tab displays 'Message Center Preferences' with a table for message types and subscription options.

Message Type	Subscribe	Email
Disputed Invoice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Completed Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



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3) Check that you have the following boxes checked for at least one role – PO VIEW & PO ADMIN

Organization Roles														
	Membership View	Membership Modify	Membership Admin	Corporate View	Corporate Modify	Corporate Admin	Corporate Integration	Invoice View	Invoice Modify	Invoice Admin	Price Book View	Price Book Modify	PO View	PO Admin
Gibson Energy Test Supplier														
Calgary														
Accounts Receivable														
Member	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Supplier Coder	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Supplier Invoice Creator	✓	✓	✓	✓	✓	✓	x	✓	✓	✓	x	x	✓	✓

4) If you **DO** have these checked and you still cannot see the PO you are looking for, please contact the person at Gibson Energy who requested the work.

If you **DO NOT** have these checked, then please proceed to step 5.



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5) Please navigate to the Departments & Roles section.

****If you DO NOT see this section, it is because you have insufficient access and you will need to contact your company OI admin or the Enverus help line.**

The screenshot shows the OpenInvoice user profile page for Kevin Lay. The navigation menu is open, highlighting 'Departments & Roles'. Below the navigation, there is a notification: 'This user currently has 26 outstanding invoices'. The user profile information is as follows:

Summary	Profile	Preferences	Security	word
Full Name:	Lay, Kevin	Last Sign Ins:		11/29/2021 06:18:08 PM MST
Username:	Kevin.Lay@supplier			11/29/2021 06:17:13 PM MST
Active:	Yes			11/29/2021 06:07:15 PM MST

6) Click on the department you belong to, or if unsure, click them all

The screenshot shows the 'Add Department' section. There is a button labeled 'Add Department'. Below it is a table with the following data:

Name	Type	Description	Notification User	Remit To	Delete
▼ Gibson Energy Test Supplier					
▼ Calgary	Site				
▶ Accounts Receivable	Department		Enverus, Admin		



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How to configure OpenInvoice accounts for Purchase Orders:

7) Click on Settings

Summary Settings

Department Name: Accounts Receivable
Department Code:
Site: Calgary
Description:
Active:
Notification: Enverus, Admin

Organization Roles

Role	PO View	PO Admin
Membership View	<input type="checkbox"/>	<input type="checkbox"/>
Membership Modify	<input type="checkbox"/>	<input type="checkbox"/>
Membership Admin	<input type="checkbox"/>	<input type="checkbox"/>
Corporate View	<input type="checkbox"/>	<input type="checkbox"/>
Corporate Modify	<input type="checkbox"/>	<input type="checkbox"/>
Corporate Admin	<input type="checkbox"/>	<input type="checkbox"/>
Corporate Integration	<input type="checkbox"/>	<input type="checkbox"/>
Invoice View	<input type="checkbox"/>	<input type="checkbox"/>
Invoice Modify	<input type="checkbox"/>	<input type="checkbox"/>
Invoice Admin	<input type="checkbox"/>	<input type="checkbox"/>
Price Book View	<input type="checkbox"/>	<input type="checkbox"/>
Price Book Modify	<input type="checkbox"/>	<input type="checkbox"/>
Price Book Approve	<input type="checkbox"/>	<input type="checkbox"/>
Field Ticket View	<input type="checkbox"/>	<input type="checkbox"/>
Field Ticket Modify	<input type="checkbox"/>	<input type="checkbox"/>
Field Ticket Pricing	<input type="checkbox"/>	<input type="checkbox"/>
Field Ticket Mobile	<input type="checkbox"/>	<input type="checkbox"/>
Payment Admin	<input type="checkbox"/>	<input type="checkbox"/>
PO View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Order View	<input type="checkbox"/>	<input type="checkbox"/>
Job Order Admin	<input type="checkbox"/>	<input type="checkbox"/>

8) Check the PO VIEW and PO ADMIN roles for all relevant roles and click SUBMIT

Summary Settings

Add Role

Organization Roles

Membership View
Membership Modify
Membership Admin
Corporate View
Corporate Modify
Corporate Admin
Corporate Integration
Invoice View
Invoice Modify
Invoice Admin
Price Book View
Price Book Modify
Price Book Approve
Field Ticket View
Field Ticket Modify
Field Ticket Pricing
Field Ticket Mobile
Payment Admin
PO View
PO Admin
Job Order View
Job Order Admin

Gibson Energy Test Supplier
Calgary

Accounts Receivable

Role	Membership View	Membership Modify	Membership Admin	Corporate View	Corporate Modify	Corporate Admin	Corporate Integration	Invoice View	Invoice Modify	Invoice Admin	Price Book View	Price Book Modify	Price Book Approve	Field Ticket View	Field Ticket Modify	Field Ticket Pricing	Field Ticket Mobile	Payment Admin	PO View	PO Admin	Job Order View	Job Order Admin
Member (5)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field Ticket Creator (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supplier Coder (5)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supplier Invoice Creator (5)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Submit Cancel



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How to configure OpenInvoice accounts for Purchase Orders:

9) You should now be able to see this section on your dashboard when you login

