

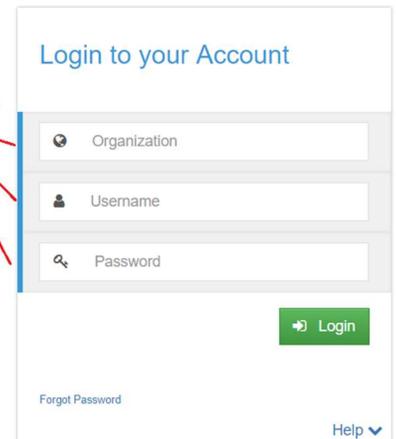
2019

Logging into onePAY

The onePAY application is supported by **Google Chrome**, **FireFox** and **Microsoft Edge** browsers.  
'Organization', 'Username' and 'Password' are all case sensitive fields.



These fields are case sensitive



Login to your Account

Organization

Username

Password

Login

Forgot Password

Help

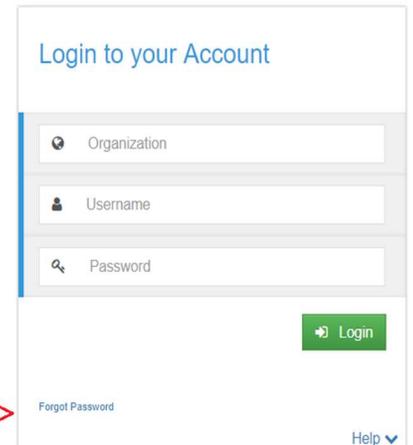
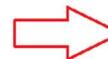
Compatible browsers



Note: Internet Explorer is no longer supported.



A user can reset their password at anytime by clicking on the 'Forgot Password' link under the login portal.



Login to your Account

Organization

Username

Password

Login

Forgot Password

Help



Note: Internet Explorer is no longer supported.

- A. Type the your 'Organization' name (case sensitive).
- B. Type in the username OR email address associated with the specific user.

**Forgot Password**

**Organization**

A.

**Email/Username**

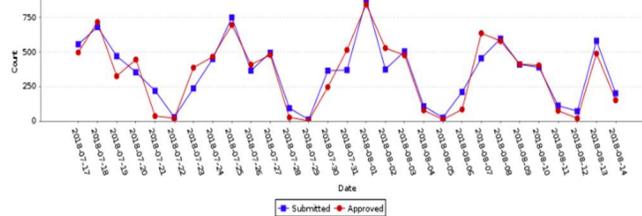
B.



\*An email will be sent to the user with instructions for re-setting the password. Click on the 'link' to complete the new password set up. For questions or more information, please email the onePAY Support Team at [onepaysupport@onedatasource.com](mailto:onepaysupport@onedatasource.com)

## The onePAY Dashboard

**Rolling 28 Day Count of Invoices Submitted and Approved**



**Rolling 60 Days of Agent Activity**

Agent	Assigned	Finalized	Due Now	Due in 15	Due in 30	To Do
Trinidad Garza	8366	8472	2	0	26	28
Skip the Agent	6800	6944	0	0	4	2
Collette Redfern	1936	1972	0	0	0	0
Lisa Fields	1767	1840	0	17	17	48
Veronica Gutierrez	1146	1213	1	4	32	34
Angel Martinez	985	991	0	0	0	1
Sylvia Harriger	575	460	0	48	33	124
J'Layne Vines	0	0	0	0	0	0
Jennifer Peters	0	0	0	0	0	0
Robert White	0	0	0	0	0	0

**Rolling 60 Days of Approver Activity**

Approver	Waiting Approval	Approved	Due Now	Due in 15	Due in 30
Trinidad Garza	2	9023	0	0	4
Otto Approver	0	6073	0	0	0
Collette Redfern	0	1930	0	0	0
Lisa Fields	0	1642	0	0	0
Veronica Gutierrez	4	1138	0	2	3
Angel Martinez	0	949	0	0	0
Sylvia Harriger	2	510	0	2	0
Lisa Silver	0	0	0	0	0
John Haynie	0	0	0	0	0
J'Layne Vines	0	0	0	0	0

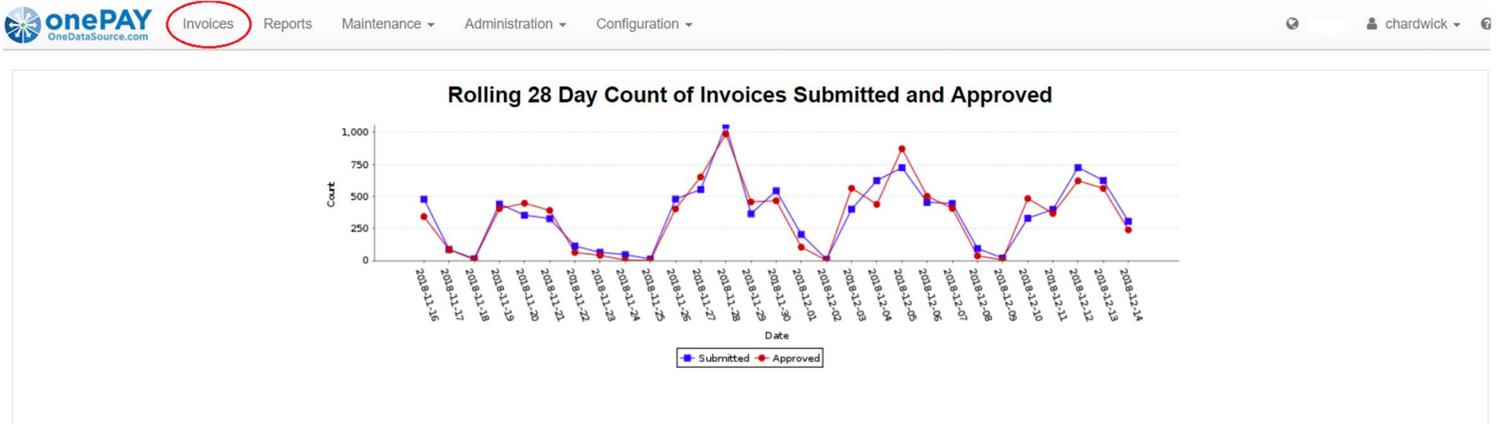
**Rolling 28 Day Count of Invoices:** This report records invoices that are uploaded to the onePAY application versus those invoices that have been approved over a 28-day period. The count is listed on the y-axis and the date on the x-axis. Mouse over the individual pin points to view specific invoice count.

**Rolling 60 Day of Agent Activity:** This chart displays the 'Agent' count of processing invoices over a 60-day period. The 'Assigned' column lists all invoices in the 'To-Do' status, 'Finalized' is any invoice that was sent to the 'Rejected' status (See Page \_\_\_ for more status information). 'Due Now': any invoice due up to the current day. 'Due in 15': any invoice due from tomorrow to day 15. 'Due in 30': any invoice due from day 16 to 30.

**Rolling 60 Day of Approver Activity:** This chart lists the invoice processing information for all approvers in onePAY. The 'Waiting Approval' column lists all invoices that are in that status over a 60-day period. For workflows that include remote or upper level approvals, this is a great method of tracking who needs to make their approvals in the application. The 'Approved' column lists all invoices that have been approved by that specific user. In some workflows, the 'Agent' can also be the 'Approver'.

## The onePAY Invoice Queue

After viewing the charts on the onePAY Dashboard, click on the 'Invoices' tab at the upper left-hand side of the screen. You will then be re-directed to the onePAY invoice queue. Any invoice that is either uploaded manually or uploaded through the 'onePAY Email System' will be displayed in this queue. *Please Note: The 'Approver' will only see invoices assigned to them in this queue view.*



The dashboard shows the following summary statistics:

- To Do: 0
- Waiting Approval: 6
- Due Now: 6
- Due in 15 Days: 0
- Due in 30 Days: 0

**List Invoices**

Actions	Vendor	Approver	Invoice Number	Unit	Issue Date	Due Date	Created Date	Total	GL Code	Company	Status
[-]	Restaurant Supply Chain Solutions	onePAY Support Approver	S11284996	TB028987 (Greenbrook)	01/27/2019	02/26/2019	01/30/2019 17:46	608.03	6090	Brands	Waiting Approval
[-]	Joe Busch Builders, LTD	onePAY Support Approver	668	00034 (MBD Abenaa Nkrumah Haynes)	11/28/2018	12/28/2018	12/11/2018 11:24	1,250.00	6110	Brands	Waiting Approval
[-]	Duke Energy OH	onePAY Support Approver	1204180030	W000030 (Lemmon Ave)	12/05/2018	12/27/2018	12/11/2018 11:18	828.29	6060	HP	Waiting Approval
[-]	Palladium Media LLC	onePAY Support Approver	011105-0007	S027054 (Del Rio)	11/15/2018	12/15/2018	12/11/2018 11:18	100.00	6180	Tejas	Waiting Approval
[-]	Chemmark Of Houston	onePAY Support Approver	312238	S027176 (Shadow Creek)	12/10/2018	12/19/2018	12/10/2018 14:57	165.15	6310	Houston	Waiting Approval
[-]	Ecolab Pest Elimination Div	onePAY Support Approver	6097233	W011295 (North Star Mall)	12/07/2018	01/06/2019	12/10/2018 10:52	79.00	6310	HP	Waiting Approval

Page 1 of 1 (100 items)

The 'Agent' will be responsible for complex coding such as splitting invoices.

The 'Approver' will only see invoices assigned to that specific user.

All invoices will be in the 'Waiting Approval' status. This status indicates that the 'Agent' has completed coding.

## Approving Invoices

Double click the invoice line item in the immediate queue to open the 'Invoice Detail' view. This is where the 'Approver' will change the status of an invoice from 'Waiting Approval' to 'Approved'. The 'Approver' can also check the specific invoice information and communicate any changes back to the 'Agent'.

Invoices Reports

onepayapprover

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For questions or changes to the invoice, click on the 'Email Pdf' icon and send a message back to the 'Agent'. A copy of the invoice will automatically attach to the email.

Remit to:  
**P.O. Box 638655**  
**Cincinnati, OH 45263-8655**  
**(502) 896-5900**

Mark TACO BELL 28987  
For: 225 ROUTE 22 EAST  
GREEN BROOK, NJ 08812

Ship TACO BELL 28987

Page: 1  
**INVOICE**  
**SI1284996**

Invoice Number	Invoice Date	Invoice Terms	Ordered By	Sales Rep	
SI1284996	01/27/19	Net 30 days	MARK	NRASMUSSEN	
RSCS Order No.	Customer Order No.	Order Date	Bill To No.	Sell To No.	Store No.
SO102352		01/03/19	6036268	30362681445	028987

Part Number	Description	Quantity	Unit Price	Total Price
E40121941	<i>Purchase Order: PO207398 Vendor: E4012 SPG/ISS International Storage Systems</i> Workstation Fry Table, 30X30X35, #FRYTAB3030RYA Rethermalizer Left/Fryer Right, Shipped Pre-Assembled, F/Std Taco Bell, Consists Of: (2) P74Y, (2) P34Y, (1) P39Y, (1) P18Cant1BY, (1) 3030Scd2H, (1) Cdu630Fly, (1) Tl630Y, (1) 1830Fsw (1) Bh30Y, (1) Bh30mr2Y, (1) Hr18Y, (1) Hmb9Y, (1) Hook12Y, (2) SI18Y, (2) Bl30Y, (1) Fg 24 Tiewrap5 (4) Pcs3, K-385 Leadtime assumes inventory available; otherws 4-6w	1	570.25	570.25

When the 'Approver' is ready to change the status of an invoice, click on the 'Waiting Approval' drop down and select 'Approved'. The page will automatically refresh and load the next invoice from the list.

Waiting Approval

- Approved
- Suspend
- Rejected
- Denied

View Invoice

Vendor	Restaurant Supply Chain Solutions	Vendor Number	U3019
Invoice Number	SI1284996	Customer Number	
Issue Date	01/27/2019	Due Date	02/26/2019
Bill Start		Bill End	

Unit	Company	GL Code	Description	Amount
TB028987	Brands	6090		608.03
<b>SubTotal</b>	<b>Tax</b>	<b>Misc1</b>	<b>Misc2</b>	<b>Amount</b>
570.25	37.78	0	0	608.03

Extra Info

Assignment

Processing Logs

Additional Notes

Change History

Click on the 'Assignment' tab to view who processed this invoice ('Agent').

The 'Additional Notes' section allows the 'Approver' to leave a note on the specific invoice.

Invoices Reports

onepayapprover

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Once approved, the invoice will become locked, therefore no other changes can be made.

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