**SmartBuy MSU – FM Review and Approval Instructions**

Please set your Notification preferences in Smart Buy. This will allow notifications via email!!

Log into SmartBuy MSU:

<https://login.montana.edu/idp/profile/SAML2/POST/SSO?execution=e1s2>

From the Home Screen click on the Profile icon in the upper right corner: 

View My Profile

Notification Preferences

Accounts Payable



This will allow you to receive email alerts of invoices / transactions reassigned to you specifically for approval. Please note you may want to update other categories for Notifications.

Now that you will be alerted: OSP Front Office will continue to review transactions and re-assign to FMs for sensitive account codes and those needing additional FM approval. You will only be alerted for transactions needing your attention.

Please note: if your link does not work from within the email notification, you will need to log into SmartBuy MSU site via the link above.

**Review Invoice:**

From the Home Screen left hand Navigation Bar







Click on the SB000 invoice hyperlink.

Invoice will open in new window. In the Summary tab (which opened) you will see the General information, scroll down to the next section **Codes.** This is where you will find the Grant index, account code and amount.



If **Codes** menu is collapsed, please click on the > icon to the right of the section.

Under Codes you will see the items purchased on the invoice.

To determine what the Front Office wants you to review please use the top Navigation bar and click comments.



This is where the Front Office will specify what you need to approve.

**Approving Invoice:**

Once you have determined the invoice is ready for approval you will see in the upper right corner:



Choose Approve and invoice will be approved out of our queue.

**Invoices NOT approved:**

**FIRST:**
Add a comment as this is the only opportunity to do so! ***Please remember the comments become part of the auditable document and seen by all.***

Click on the Comments tab from the top navigation banner



Click the + sign on the far right side of section.

Fill in text box with requirements needed for approval. Once completed click the ✔ to save.

**SECOND:**

You will return the invoice to the shared folder using the dropdown menu in the upper right corner as seen below.



This returns the invoice/transaction to the Front Office, they will coordinate and request the required documentation or any changes from FSS or the Department. Once requests have been received, they will reassign to you again for approval. .