Welcome to the new look and feel of nexus payables. We will go over many features of the program.

1. First, let’s go over the security features and what you need to do the first time you log in.
2. Let’s start by clicking on ADMINISTRATION and click on MY SETTINGS
   a. The first tab labeled User Information in an important one. One: please make sure your email is entered correctly.
   b. On the tabs to left, you will see one labeled PASSWORD MANAGEMENT.
      i. Here I strongly urge you to set up ALL 6 security questions, as this will allow you to change and reset your password. By doing this you will not have to wait for an IT response to reset your password. Just answer 2 of the questions you set up and you are good to reset.
3. The settings tab allows you to set up a preferred property or property type. (Not recommended).
4. Display tab will always you to adjust the split screen function.
5. Email notification tab allows you to set up notifications about specific things.
   a. It is recommend that you set up notification for invoices on hold over a certain amount of days. Just check the box and add the number of days you wish
6. User delegation- Here you will find a list of current delegations within the system. This would be a good place to look if you know you GM is out and you want to see who they delegated to or if they even did set up a delegation.
7. Dashboard tab is where you can rearrange the bottom boxes and what is displayed.
   a. YOU CANNOT CHANGE THE TOP 3 BOXES. The default setting for AP is Completed invoice to approve (post /approve) Post/Approve and Invoices on Hold-
b. If you make changes please remember to hit SAVE. You can also adjust the columns to view what you want to see and in what order.
   i. Click on the black down arrow to adjust what columns you want to view.
   ii. Click and drag column to put them in the order you want to view them in.
8. In order to change the property you are defaulted to click on change and change the property or click on ALL and done. This can be done on multiple screens
9. Overview is simply that- an overview.
10. There are 2 ways to get to your homepage (dashboard). Either by clicking on Nexus Payables or the home bottom.
11. There are two ways to get to your settings- one is the Administrative tab- the others under the profile pic

At the top of the screen, you have a menu bar;

12. Let’s start with invoices.
   a. You have two options-
      i. Search and the invoices register.
         1. The invoice register houses all the different stages of invoices from open through paid.
         2. If you do not know the status of your invoice, you can always do a search.
         a. Here you can search for different types (recommend to just use ALL) you need to add a "by" and a key word based on your “by selection” for instance if you selected any, by vendor id you would enter the vendor ID.
         b. Make sure either you have “all” or you certain properties selected.
c. Once you click “all” it should remain that way through out your log in session.

13. Searching for vendors. There are several ways to accomplish this as well.
   a. You can click on the letters (not recommend as this lists everything with that letter in it).
   b. Or by typing in a key word such as the name or address and your “by” which is recommenced to leave at “all” Standard formatting for po boxes is PO space box.

14. Invoice management contains tabs relevant to uploading images, searching images, and exceptions. We will go over those next.

15. The report tab houses all of the system, custom, and various other reports. Separate training is available for reporting.