



Lowe'sLink[®]
Spend Management (SM)
Tracking Invoices and Payments

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Agenda

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Expectations

- This guide is written with the expectation that the user is registered for Spend Management.
- If not registered, please refer to the *LowesLink® Registration and Requesting Access to Spend Management* document located at www.LowesLink.com > Existing Partner Information > Spend Management Expense Vendor Information > For New Vendors.
- Also, that the user is familiar with logging into LowesLink®, locating the Spend Management US & Canada link, and logging into Oracle.
- If unfamiliar with logging in, please refer to the ***Logging into LowesLink® and Spend Management*** document located at www.LowesLink.com > Existing Partner Information > Spend Management Expense Vendor Information > Job Aids.
- If having login issues, please refer to the ***Login Password Issues*** document located at www.LowesLink.com > Existing Partner Information > Spend Management Expense Vendor Information > Job Aids.

Introduction

- Tracking Invoices and Payments is a key element for good cash flow.
- The following steps will demonstrate how to track invoices, payment and determine the total amount due.

Review Payment Information Application Menu

Navigate: Main Menu > Review Payment Information

- **Invoices** – review details on invoices that have yet to be paid.
 - Search criteria based on Invoice ID and/or date ranges.
- **Payments** – invoices that have already been paid.
 - Search criteria based on Reference No (check number) or Invoice ID, and/or date range.
 - *Note: For payments that are over a month old, please see next slide.*
- **Account Balance** – all outstanding invoices with no search criteria

The screenshot displays the application's main menu interface. At the top left, there is a 'Main Menu' dropdown. Below it is a 'Search Menu' section with a search input field and a search button. The menu items are listed in a vertical column, with 'Review Payment Information' highlighted in orange. A sub-menu is open for 'Review Payment Information', showing three options: 'Invoices', 'Payments', and 'Account Balances', each with a document icon and a red arrow pointing to it. The background shows a 'Welcome' message and 'Announcements' and 'Upcoming Events' sections.

Payment Information in LowesLink® Vendor Inquiry Application

- **Payments** – invoices that have already been paid.
 - Payments that are over a month old may not be available for viewing in Spend Management.
 - Please access LowesLink® Vendor Inquiry application to view payment information.
- Information for utilizing LowesLink® Vendor Inquiry – Invoice Search – Paid & Setup and LowesLink® Vendor Inquiry – Check Search can be found on www.LowesLink.com then navigating Existing Partner Information > Spend Management Expense Vendor Information > Job Aids > Invoices and Payments then select either:
 - [LowesLink® Vendor Inquiry – Invoice Search – Paid & Setup](#)
 - [LowesLink® Vendor Inquiry – Check Search](#)

“Invoices” Option

- Default: The From / To date fields are populated.
 - From Date = Current Date minus 31 Days
 - To Date = Current Date

The screenshot shows the Oracle Invoices search interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Review Payment Information', and 'Invoices'. Below this is the Oracle logo and the title 'Review Invoices'. The 'Filter Options' section includes the text 'Supplier Name Displays Here' and instructions to 'Enter search criteria and click on Search. Leave blank for all values.' The 'Search Criteria' section contains several input fields: 'From Invoice Number', 'To Invoice Number', 'Item ID' (with a search icon), 'Supplier Item ID' (with a search icon), 'From Date' (with a calendar icon and a 31-day offset button, and an example '(example: 01/31/2000)'), 'To Date' (with a calendar icon and a 31-day offset button, and an example '(example: 01/31/2000)'), 'From Amount', 'To Amount', and 'Approval Status' (with a dropdown arrow). A 'Search' button is located at the bottom left.

Favorites ▾ | Main Menu ▾ > Review Payment Information ▾ > Invoices

ORACLE

Review Invoices

Filter Options

Supplier Name Displays Here

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

From Invoice Number

To Invoice Number

Item ID 🔍

Supplier Item ID 🔍

From Date 📅 31 (example: 01/31/2000)

To Date 📅 31 (example: 01/31/2000)

From Amount

To Amount

Approval Status

Search Options

- On the search page, do **not** use the Item ID or Supplier Item ID fields.
- Use the default date range or change to whatever dates are needed.
- To search with an invoice number, remove the From/To dates and then enter the invoice number information.
- Option: Search can be submitted without any criteria which pulls all invoices not purged however this type of search may cause the search to timeout.

The screenshot displays the Oracle Invoices search interface. At the top, there are navigation tabs: Favorites, Main Menu, Review Payment Information, and Invoices. Below this is the Oracle logo and the heading "Review Invoices". Underneath, it says "Filter Options" and "Supplier Name Displays Here". A instruction reads: "Enter search criteria and click on Search. Leave blank for all values." The "Search Criteria" section contains several input fields: "From Invoice Number" and "To Invoice Number" (both highlighted with a red box), "Item ID", "Supplier Item ID", "From Date" and "To Date" (both highlighted with a red box and including a calendar icon and an example "example: 01/31/2000"), "From Amount", "To Amount", and "Approval Status" (a dropdown menu). A "Search" button is located at the bottom left.

Search for the Invoice - Example

- Enter search criteria and then click the Search button.

Favorites ▾ Main Menu ▾ > Review Payment Information ▾ > Invoices

ORACLE

Review Invoices

Filter Options

Supplier Name Displays Here

Enter search criteria and click on Search. Leave blank for all values.


Search Criteria


From Invoice Number

To Invoice Number

Item ID

Supplier Item ID


From Date  (example: 01/31/2000)

To Date  (example: 01/31/2000)


From Amount

To Amount

Approval Status



Search Results

- The Invoice(s) will display based on search criteria used.
- Click each invoice number link to view the invoice details.
- **Note:** Click on the Excel icon  to download the information shown to Excel if necessary.

Favorites ▾ | Main Menu ▾ > Review Payment Information ▾ > Invoices



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Review Invoices

Invoice List

Supplier Name Displays Here

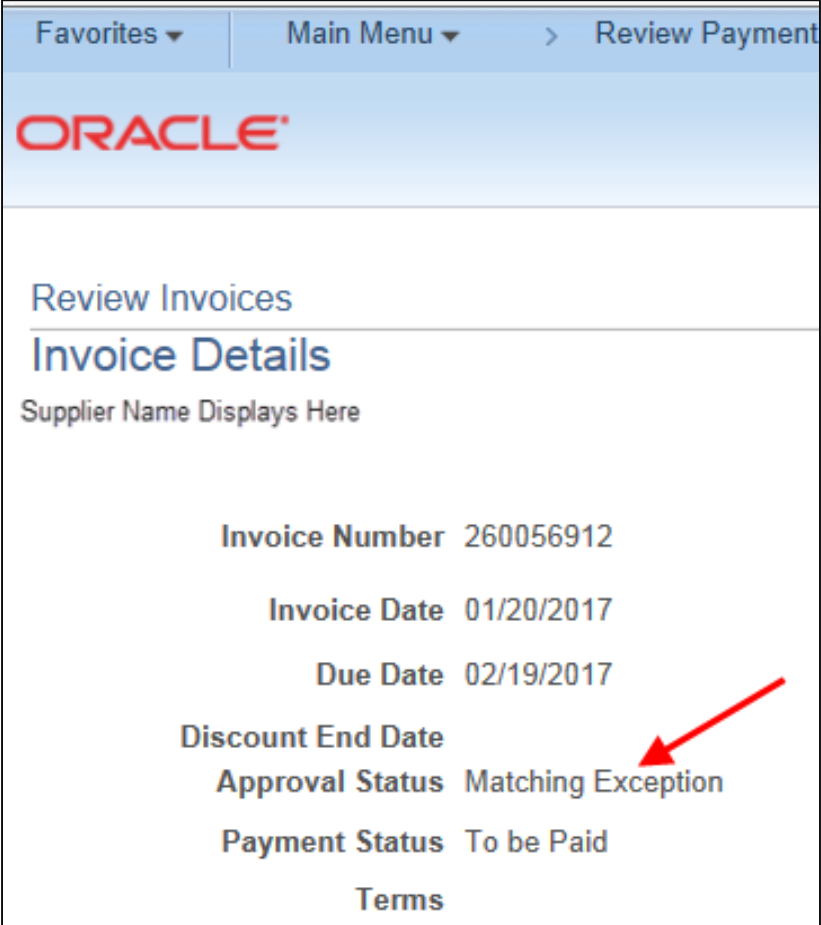
Set filter options

Invoice List							Personalize Find  	First  1 of 1  Last
Invoice Number	Invoice Date	Gross Amt		Approval Status	Due Date	Voucher		
260056912	01/20/2017	\$4,104.69	USD	Approved	02/19/2017	CBLR4X		

Search Results

Approval Status = Exception Status

- If on the Invoice Details page, the Approval Status shows "Matching Exception," contact the Lowe's Buyer for assistance in resolving the issue.
- Matching exceptions can range from missing receipts, incomplete receipts, duplicate invoices, etc.





The screenshot shows the Oracle Invoice Details page. At the top, there are navigation links for 'Favorites', 'Main Menu', and 'Review Payment'. Below this is the Oracle logo. The page title is 'Review Invoices' followed by 'Invoice Details'. A placeholder text 'Supplier Name Displays Here' is visible. The main content area lists invoice details: Invoice Number 260056912, Invoice Date 01/20/2017, Due Date 02/19/2017, Discount End Date, Approval Status Matching Exception (highlighted with a red arrow), and Payment Status To be Paid. The word 'Terms' is at the bottom.



Invoice Number	260056912
Invoice Date	01/20/2017
Due Date	02/19/2017
Discount End Date	
Approval Status	Matching Exception
Payment Status	To be Paid
Terms	

Search Results

- Scroll to the bottom of the Invoice Details to view additional information about the invoice.



▼ **Payment Schedule**
Personalize | Find | View All |   First 1 of 1 Last

Scheduled to Pay	Payment Number	Gross Amt	Discount	Method	Status	On Hold	Withd Hold
02/19/2017		\$4,104.69 USD	\$0.00 USD	EFT	Unselected	No	No



▼ **Payments Made**
Personalize | Find | View All |   First 1 of 1 Last

Reference	Date	Amount
		\$0.000

No Payments Made

▼ **Purchase Orders**
Personalize | Find | View All |   First 1 of 1 Last

Purchase Order	PO Date	Status
0170092064	09/14/2016	Dispatched

▼ **Receipts**
Personalize | Find | View All |   First 1 of 1 Last

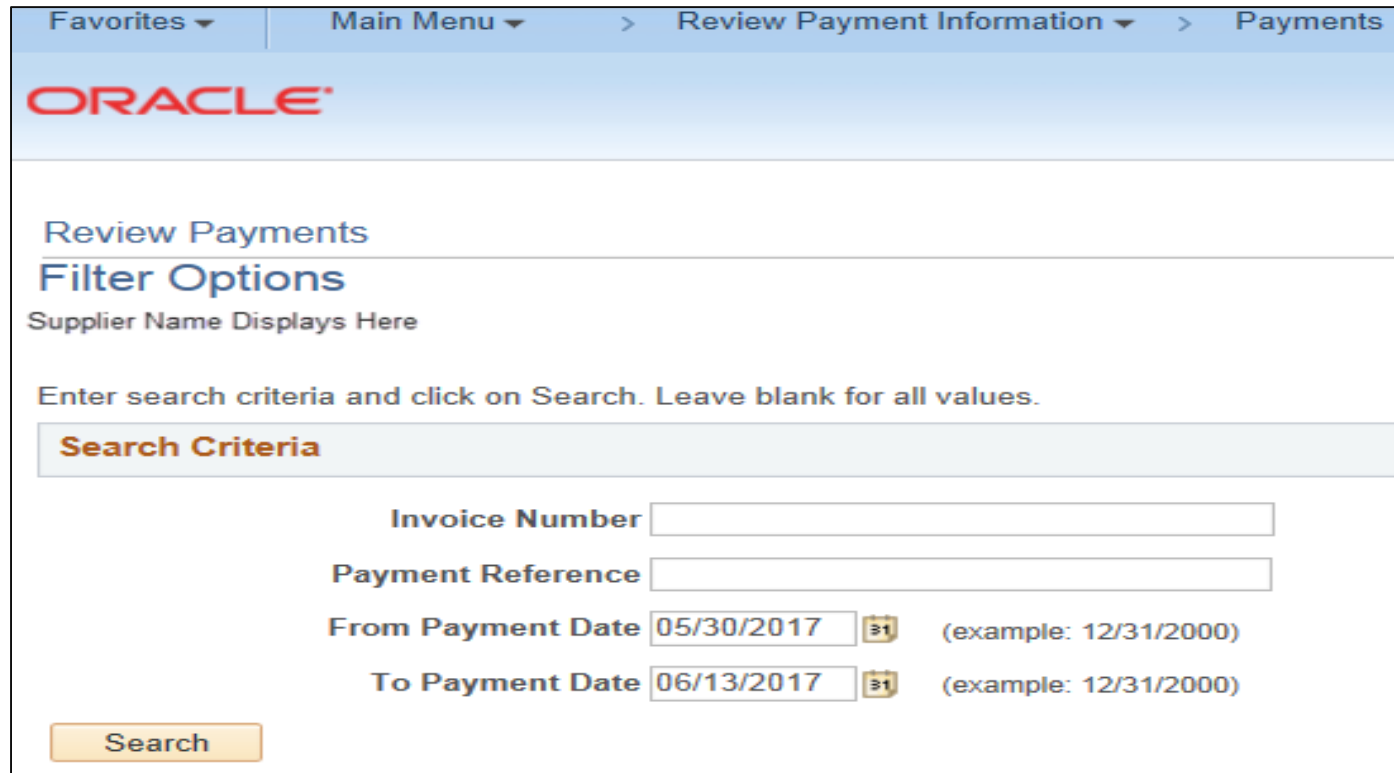
Received Date	Receipt Number	Bill of Lading	Packing Slip

No Receipts Found

[Return to Invoice List](#)

“Payment” Option

- The Payments option will provide similar information for invoices that have been paid.
- Payment information will only be available in Spend Management for 30 days. Refer to slide #6 for additional information on locating payment information.
- Default: The From / To date fields are populated.
 - From Date = Current Date minus 14 Days
 - To Date = Current Date



The screenshot displays the Oracle Payments interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Review Payment Information', and 'Payments'. Below this is the Oracle logo. The main heading is 'Review Payments' followed by 'Filter Options'. A note states 'Supplier Name Displays Here'. A search instruction reads 'Enter search criteria and click on Search. Leave blank for all values.' Below this is a 'Search Criteria' section with the following fields: 'Invoice Number' (empty), 'Payment Reference' (empty), 'From Payment Date' (05/30/2017), and 'To Payment Date' (06/13/2017). Both date fields include a calendar icon and an example '(example: 12/31/2000)'. A 'Search' button is located at the bottom left.

Search Options

- Invoice Number: remove the From/To dates then enter the invoice number information.
- Payment Reference: Enter check number to search for specific check
- Date Range: Can use the default date range or change to whatever is needed.
- Option: Search can be submitted without any criteria to view all invoices not purged however this type of search may cause the search to timeout .
- Click Search.

The screenshot shows the Oracle 'Review Payments' interface. At the top, there are navigation tabs: 'Favorites', 'Main Menu', 'Review Payment Information', and 'Payments'. Below the Oracle logo, the page title is 'Review Payments' and the section is 'Filter Options'. A note says 'Supplier Name Displays Here'. Below that, it says 'Enter search criteria and click on Search. Leave blank for all values.' The 'Search Criteria' section contains four input fields: 'Invoice Number', 'Payment Reference', 'From Payment Date', and 'To Payment Date'. The date fields have a calendar icon and an example '(example: 12/31/2000)'. A 'Search' button is located at the bottom left of the form.

Search Results

- The payments will display based on the search criteria used. Click each Reference link to see the payment details. One payment reference number may encompass several invoices.
- Note: Click on the Excel icon to download the information shown to Excel.

Favorites ▾ Main Menu ▾ > Review Payment Information ▾ > Payments

ORACLE® Example of paid in USD

Review Payments

Payments Made

Supplier Name Displays Here

Set filter options

Payments Made Personalize | Find |  First 1-10307 of 10307 Last

Reference	Invoice Number	Payment Date	Amount
1234567	Example 1	12/13/2016	\$ 1,000.00 USD
1234567	Example 2	12/13/2016	\$ 500.00 USD
1234567	Example 22	12/13/2016	\$ 1,200.00 USD

Download to Excel option

Favorites ▾ Main Menu ▾ > Review Payment Information ▾ > Payments


ORACLE® Example of paid in CAD

Review Payments

Payments Made

Supplier Name Displays Here

Set filter options

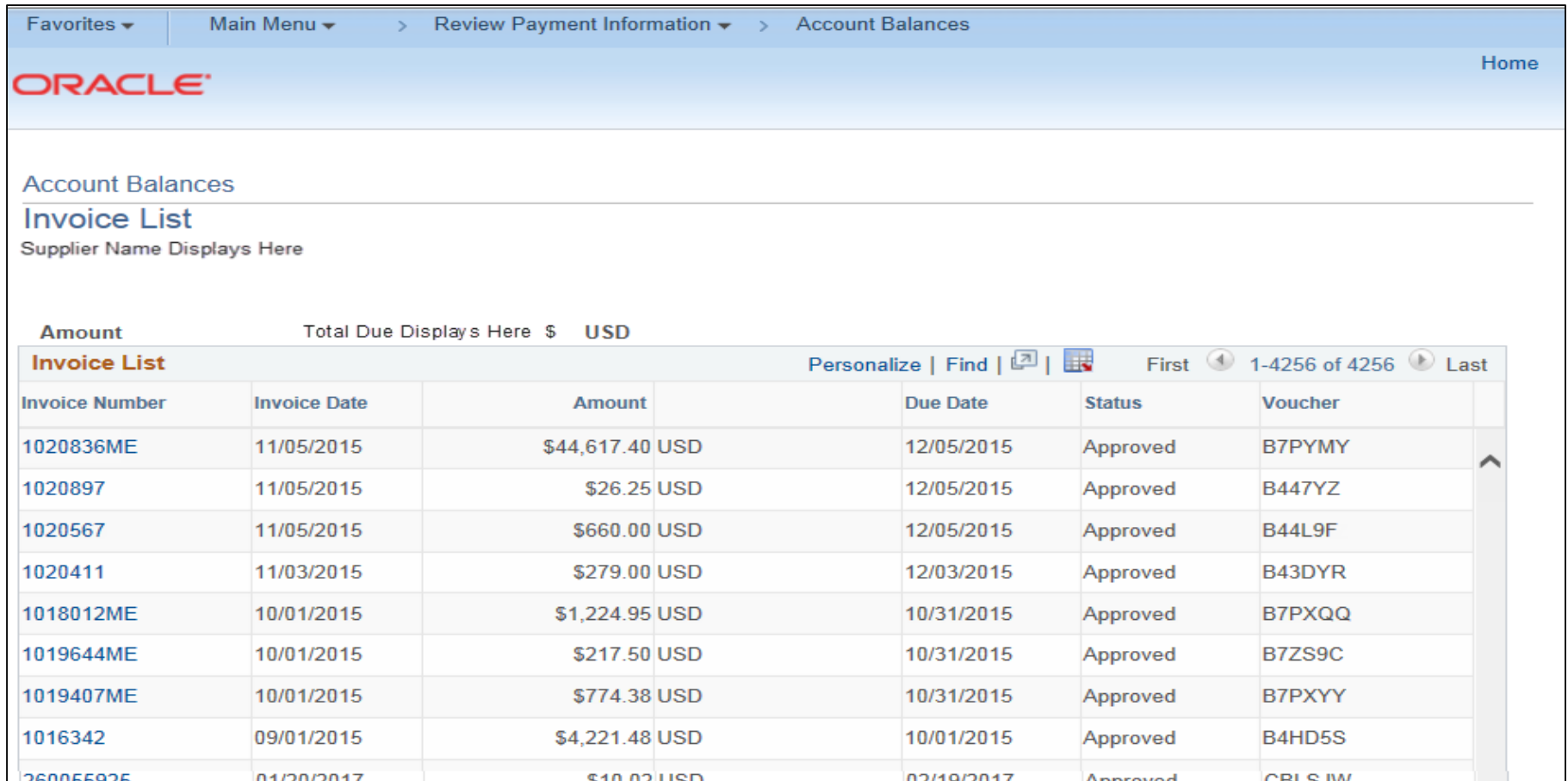
Payments Made Personalize | Find |  First 1-10307 of 10307 Last

Reference	Invoice Number	Payment Date	Amount
1234570	Example 7	12/13/2016	\$ 1,100.00 CAD
1234570	Example 8	12/13/2016	\$ 700.00 CAD
1234570	Example 15	12/13/2016	\$ 1,025.00 CAD

Download to Excel option

“Account Balances” Option

- The Account Balances option does not have search criteria. This option displays all invoices to be paid, as well as a total amount due.
- Click the Invoice Number link to see the invoice details.



The screenshot shows the Oracle Account Balances interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Review Payment Information', and 'Account Balances'. The Oracle logo is on the left, and 'Home' is on the right. Below the navigation bar, the page title is 'Account Balances' and 'Invoice List'. A note says 'Supplier Name Displays Here'. Below that, there is a section for 'Amount' and 'Total Due Displays Here \$ USD'. The main part of the screenshot is a table of invoices. The table has columns for Invoice Number, Invoice Date, Amount, Due Date, Status, and Voucher. The table is paginated, showing '1-4256 of 4256' records. The first few rows of the table are as follows:

Invoice Number	Invoice Date	Amount	Due Date	Status	Voucher
1020836ME	11/05/2015	\$44,617.40 USD	12/05/2015	Approved	B7PYMY
1020897	11/05/2015	\$26.25 USD	12/05/2015	Approved	B447YZ
1020567	11/05/2015	\$660.00 USD	12/05/2015	Approved	B44L9F
1020411	11/03/2015	\$279.00 USD	12/03/2015	Approved	B43DYR
1018012ME	10/01/2015	\$1,224.95 USD	10/31/2015	Approved	B7PXQQ
1019644ME	10/01/2015	\$217.50 USD	10/31/2015	Approved	B7ZS9C
1019407ME	10/01/2015	\$774.38 USD	10/31/2015	Approved	B7PXYY
1016342	09/01/2015	\$4,221.48 USD	10/01/2015	Approved	B4HD5S

For Assistance with Tracking Invoices and Payments:

Email ExpenseSSI@lowes.com

or

Call our Finance Resource Center at 336-658-2121,
select option 3 for LowesLink[®] then
select option 3 for Spend Management (Expense SSI)