

Approving an Amount Only Purchase Order

This guide is designed for approvers in myUF Payment Solutions. To complete the process described below, you must have the UF_SY_BUSUNIT_UFLOR role *and* either the UF_AP_Reviewer *or* UF_AP_Approver security role in myUFL. For a complete coverage of content and skills related to myUF Payment Solutions, please see the following online course: PST970 myUF Payments for Approvers.

To access myUF Payment Solutions, use the following steps:

- Visit <http://my.ufl.edu>
- Click the Access myUFL button
- Enter your GatorLink username and password
- Click the Login button
- Click **Main Menu > My Self Service > myUF Payment Solutions**

An invoice can come in for a Purchase Order to be paid in increments over time. An example would be a PO with different invoices of various amounts.

In this guide, you will practice the steps for paying the unmatched line for an invoice.

1. Click the **Work Invoice** icon.
2. Notice here that there is no money allocated for this invoice. This indicates that there is no match between the purchase order and the invoice.

Amount:	<input type="text" value="41.78"/>	Allocated: 0.00 Remaining: 41.78
Tax:	<input type="text" value="0.00"/>	

3. Click the **Line Items** tab to check the purchase order, both the matched lines (those that match this invoice's lines) and the unmatched lines (items remaining to be paid).

Notice here in the **Matched** section that there are no matching line items for the purchase order.

Matched																	
Level	Type	PO #	Line #	Item Description	Qty	Unit Price (\$)	Tax (\$)	Amount (\$)	UM	Multiplier	Qty Avail	Invoice Qty	Unit Price (\$)	Tax (\$)	Amount (\$)	Invoice #	Actions
\$0.00																	
No records exist																	
Filter																	
PO #	Vendor #	Item #	Receipt Date From	Receipt Date To	Actions												
1500374578					✎ ✖												

4. In the **Unmatched** section, the blanket amount for this purchase order is \$265.50. To allocate the \$41.78 that is due now, you'll need to match this PO line for the overall amount.

Unmatched												
Type	PO #	Line #	Item Description	Qty	Unit Price (\$)	Tax (\$)	Amount (\$)	UM	Multiplier	Qty Avail	Select	Actions
Receipt	1500374578	14	CX100 COGGED BELT BROWNING	6	44.25	0	265.5	EA	1	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Viewing record 1 | 15 records per page | Show total record count

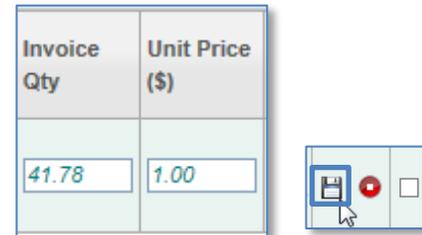
- Click the selection box on the far right of the unmatched line.
- Click the **Select** icon (green check).



Notice that the full \$177.00 has now jumped to the **Matched** section. The invoice header also indicates that you have allocated \$177.00 to pay for this invoice. Because you only need \$41.78, you'll need to edit the \$177.00 amount.

Matched											Amount: 41.78		Allocated: 177.00 Remaining: -135.22										
Level	Type	PO #	Line #	Item Description	Qty	Unit Price (\$)	Tax (\$)	Amount (\$)	UM	Multiplier	Qty Avail	Invoice Qty	Unit Price (\$)	Tax (\$)	Business Unit	Department	Fund	Program Code	Account Code	Budget Reference	Amount (\$)	Invoice #	Actions
Receipt		1500374578	14	CX100 COGGED BELT BROWNING	6	44.25	0	265.5	EA	1	0	4	44.25	0	UFOR	63300200	151	7900	739100	CRRNT	177.00	S4482379.004	View Splits 
																					\$177.00		

- Click the **edit icon** (pencil). 
- Delete the **Quantity**.
- Enter the desired information into the **Quantity** field. The **Unit Price** will remain **\$1.00**. In this example, enter a valid value e.g. "**76.25**".
- Click the **Save** icon.
- \$41.78 is now allocated to cover the current invoice.
- Click the **Save** icon.



- Provided that all information you have entered is correct/ permissible, the green checkmark will become active.
- Click the **Approve** button to submit the invoice.



If you need help with...

- Technical issues, contact the UF Help Desk:
 - 392-HELP(4357)
 - helpdesk@ufl.edu
- Procedures, Policies and Directives, contact University Disbursements:
 - 392-1241
 - Disbursements@ufl.edu