

# Creating an Invoice from a Purchase Order

#### Overview

This guide will show you how to manually create an invoice from a purchase order (PO).

## Navigation

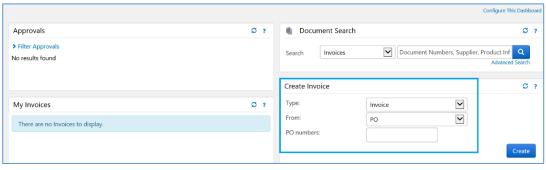
Within myUFL, navigate to:

- ⇒ Nav Bar

#### Process



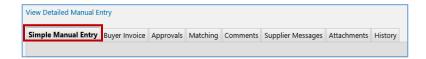
- 1. Click on Accounts Payable icon.
- 2. Click AP Home.
- 3. Within the *Create Invoice* section of the dashboard:



- Check the dropdown list says Invoice.
- Make sure the From: dropdown says PO.
- If it doesn't, click the arrow to change the selection from Non PO to PO.
- 4. Add the PO number to the PO field and click Create.

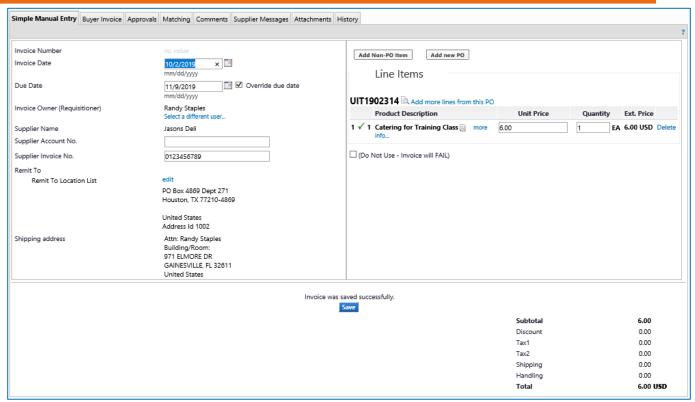
#### From the Simple Manual Entry Tab

5. When the Invoice opens, edit the **Invoice date** as necessary.



- 6. Click the Override due date check box and change the Due Date as necessary.
- 7. Add the Supplier Invoice Number.
- 8. Update the Quantity to reflect partial payment.



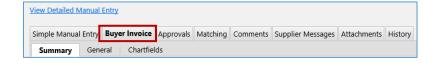


You may notice a check box below the Subtotal called "(Do Not Use – Invoice will Fail)". This is **NOT** where you need to add any information. Any information inserted in these fields will create an error. Discount, tax, shipping, and handling information should be added as a Non-PO Line.

9. Click Save.

In the **Buyer Invoice** Tab

 Within the Buyer Invoice tab, click Add Attachments and add an internal attachment to the Invoice.

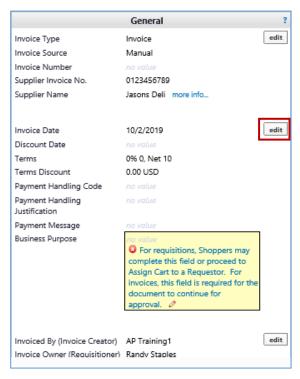


Existing documents from the purchase order may be present. You can still attach documents as advised above. You don't need to modify the existing attachments. If you don't have space to attach your documents, contact the myUF Marketplace Helpdesk.

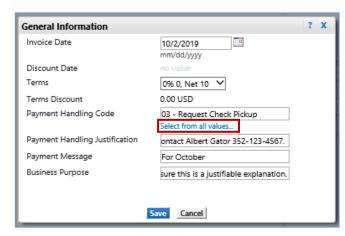
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11. In the General section, click the second **edit button** from the top. This one is located beside the Invoice Date line.

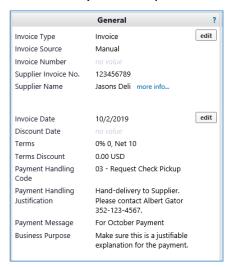


- 12. Click the Select from all values link.
- 13. In the dropdown menu, select the appropriate **Payment handling code**.
- 14. Enter a Payment Handling Justification.
- 15. Enter a Payment Message.
- 16. Enter a justifiable Business Purpose.
- 17. Click Save.





### This is what you can expect to see.



18. At the top right, click Complete.



### Additional Assistance

myUF Marketplace - Marketplace Help Desk

Email: myUFMarketplace@ufl.edu

Phone: (352) 392-1335

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