

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
- ⇒ Main Menu
- ⇒ My Self Service
- ⇒ myUF Marketplace

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.

Simple Manual Entry | Buyer Invoice | Approvals | Matching | Comments | Supplier Messages | Attachments | History

Invoice Number: no value
 Invoice Date: 10/2/2019
 Due Date: 11/9/2019 ☒ Override due date
 Invoice Owner (Requisitioner): Randy Staples
 Supplier Name: Jasons Deli
 Supplier Account No.:
 Supplier Invoice No.: 0123456789
 Remit To: edit
 Remit To Location List: PO Box 4869 Dept 271, Houston, TX 77210-4869
 Shipping address: Attn: Randy Staples, Building/Room: 971 ELMORE DR, GAINESVILLE, FL 32611, United States

Line Items

UIT1902314 Add more lines from this PO

Product Description	Unit Price	Quantity	Ext. Price
1 ✓ 1 Catering for Training Class more	6.00	1	EA 6.00 USD Delete

☐ (Do Not Use - Invoice will Fail)

Invoice was saved successfully. [Save](#)

Subtotal	6.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	6.00 USD

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

10. Within the Buyer Invoice tab, click [Add Attachments](#) and add an internal attachment to the Invoice.

[View Detailed Manual Entry](#)

Simple Manual Entry | **Buyer Invoice** | Approvals | Matching | Comments | Supplier Messages | Attachments | History

Summary | General | Chartfields

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.

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

General

Invoice Type	Invoice	edit
Invoice Source	Manual	
Invoice Number	no value	
Supplier Invoice No.	0123456789	
Supplier Name	Jasons Deli more info...	
Invoice Date	10/2/2019	edit
Discount Date	no value	
Terms	0% 0, Net 10	
Terms Discount	0.00 USD	
Payment Handling Code	no value	
Payment Handling Justification	no value	
Payment Message	no value	
Business Purpose	<div style="border: 1px solid black; padding: 5px; background-color: yellow;"> <p>For requisitions, Shoppers may complete this field or proceed to Assign Cart to a Requestor. For invoices, this field is required for the document to continue for approval.</p> </div>	
Invoiced By (Invoice Creator)	AP Training1	edit
Invoice Owner (Requisitioner)	Randy Staoles	

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**.

General Information

Invoice Date	10/2/2019 mm/dd/yyyy
Discount Date	no value
Terms	0% 0, Net 10
Terms Discount	0.00 USD
Payment Handling Code	03 - Request Check Pickup Select from all values...
Payment Handling Justification	ontact Albert Gator 352-123-4567.
Payment Message	For October
Business Purpose	sure this is a justifiable explanation.

[Save](#) [Cancel](#)

This is what you can expect to see.

General		?
Invoice Type	Invoice	<input type="button" value="edit"/>
Invoice Source	Manual	
Invoice Number	no value	
Supplier Invoice No.	123456789	
Supplier Name	Jasons Deli more info...	
Invoice Date	10/2/2019	<input type="button" value="edit"/>
Discount Date	no value	
Terms	0% 0, Net 10	
Terms Discount	0.00 USD	
Payment Handling Code	03 - Request Check Pickup	
Payment Handling Justification	Hand-delivery to Supplier. Please contact Albert Gator 352-123-4567.	
Payment Message	For October Payment	
Business Purpose	Make sure this is a justifiable explanation for the payment.	

18. At the top right, click **Complete**.



Additional Assistance

myUF Marketplace – Marketplace Help Desk

Email: myUFMarketplace@ufl.edu

Phone: (352) 392-1335