

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:

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- ⇒ 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 **Entry** Tab with **Detailed** toggled on:

5. When the Invoice opens, edit the **Invoice date** as necessary.
*Clicking the **Override due date check box** will not change the payment date of the invoice. Payment dates are determined by the agreed supplier payment Terms (Located on the Summary tab)
6. Add the **Supplier Invoice Number**.
7. Save

Entry	Summary	Matching	Supplier Messages	Comments	Attachments	History
Invoice Date	9/23/2021 <small>mm/dd/yyyy</small>	Remit To	PO Box 4869 Dept 271 Houston, Texas 77210-4869 United States Address Id 1002			
Supplier Name	Jasons Deli	Billing address	no address			
Terms	0% 0, Net 10	External Attachments	Add			
Terms Discount	0.00 USD	Invoice Owner (Requisitioner)	* Elizabeth Pearson Select a different user...			
Invoice Type	Invoice					
Record No.						
Supplier Invoice No. *	13k599					
Business Purpose *	Add your business purpose here					

If using Simple manual entry, you may notice information below the Supplier Invoice No.* called “(Do Not Use– Invoice will Fail)”. Anything entered in this section will allocate to the header chartfield. Invoices with taxes added will fail and should be removed. Discount, tax, shipping, and handling information should be added as Non-PO Lines.

8. On the **Summary** tab, click the pencil icons to edit General and Addresses and click **Add** to add Internal attachments

Editing **General** Editing General will allow you to edit the Supplier Invoice number, Invoice date, Payment Message, Business Purpose and changing the Invoice Owner. *If Special Handling is required... In the Payment Justification field, select the Handling Code needed, provide the justification, contact information, etc.,

Edit General

Invoice Information

Supplier Invoice No. *

Required

General Information

Invoice Date

8/27/2021
mm/dd/yyyy

Terms

0% 0, Net 10

Payment Handling Code

Payment Handling Justification

Payment Message

Business Purpose *

Required

Other Information

Invoice Owner (Requisitioner) *

Elizabeth Pearson
[Select a different user...](#)

★ Required fields

Save

Close

Editing **Addresses** will allow you to change the supplier remit and bill to address of the invoice.

On the **Notes/Attachments** section click **Add** Internal Attachment to add backup documentation for the invoice

The screenshot shows the 'Add Attachments' modal on the left and the 'Note/Attachments' section on the right. The modal has a blue header with a close button. It contains an 'Attachment Type' section with radio buttons for 'File' (selected) and 'Link'. Below this is a 'File(s) *' field with a yellow 'SELECT FILES...' button and the text 'Drop files to attach, or browse.' and 'Maximum upload file size: 9.77 MB'. At the bottom of the modal are 'Required fields' text, a yellow 'Save Changes' button, and a 'Close' button. The 'Note/Attachments' section on the right has a header with a close button and a dropdown. It contains an 'External Note' field with the value 'no value', an 'External Attachments' section with a blue 'Add' button, and an 'Internal Attachments' section with a yellow 'Add' button and a red 'Required' indicator.

*Per department requests - As of 11/15/21 PO attachments will no longer transfer to invoices

10. to add a non-po line for Discount, tax, shipping, and handling information, etc.:
On the **Summary tab**, scroll down to the Line section and click the three dots icon
Select the Add Non-PO Item option.

The screenshot shows the '2 Lines' section with a table of line items. The table has columns: Status, PO Line, Item, Catalog No., Size/Pack aging, Unit Price, Quantity, and Ex. The first line item has a status of '1', a PO Line of '1', an Item of 'Review of Recruitment...', a Catalog No. of 'EA', a Unit Price of '340.00', and a Quantity of 'Qty: 1 EA'. To the right of the table is a yellow button labeled 'Add Non-PO Item'. Above the table is a '<No PO Number>' section with a three-dot menu icon.

Fill out the form.
Add a Description, Quantity and Price.
Click Save.

The screenshot shows the 'Add Non-PO Item' form. It has a blue header with a close button. The form is divided into two sections: 'Item' and 'Additional Details'. The 'Item' section has a table with columns: Description *, Catalog No., Quantity *, Price, and UOM. The first row has a description of 'Freight costs', a Catalog No. of '25.00', a Quantity of '1', a Price of '25.00', and a UOM of 'EA'. Below the table is a '241 characters remaining' text. The 'Additional Details' section has a 'PO Number' field and a 'Commodity Code' field with a search icon. At the bottom are 'Required fields' text, a yellow 'Save' button, a 'Save And Add Another' button, and a 'Close' button.

Scroll to check for errors. If you notice a mistake, click on the line description and make adjustments.

11. Review PO lines and update the **Quantity** to reflect partial payment, if needed.

Line Items

2200929586

Status	PO Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	✓	1 US National Sectera viPer Universal Secure Phone (with PSTN Connect)	VIPF1000-XAMDM	EA	2,995.00	1 EA	2,995.00

ITEM DETAILS

Contract:

Select Contract

PO Number

2200929586

Substitute Item

×

Override Withholding

☐

External Note

External Line Attachments

Add

12. For a manually input invoice, you will click “Complete: By Clicking This Button, You Acknowledge Receipt of Goods And Services On Behalf of UF” to finish Department Level 1 Approver processing and move the invoice through the approval workflow.

Complete: By Clicking This Button, You Acknowledge Receipt Of Goods And Services On Behalf Of UF

Additional Assistance

myUF Marketplace – Marketplace Help Desk

[Contact Us](#)

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