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 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
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.,

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.

*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.

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

   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.

<table>
<thead>
<tr>
<th>Line Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>2200929586</td>
</tr>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Contract:</td>
</tr>
<tr>
<td>External Note:</td>
</tr>
<tr>
<td><strong>External Line Attachments</strong></td>
</tr>
</tbody>
</table>

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**

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**Additional Assistance**

**myUF Marketplace – Marketplace Help Desk**

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