# Creating an Invoice from a Purchase Order

## Overview

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

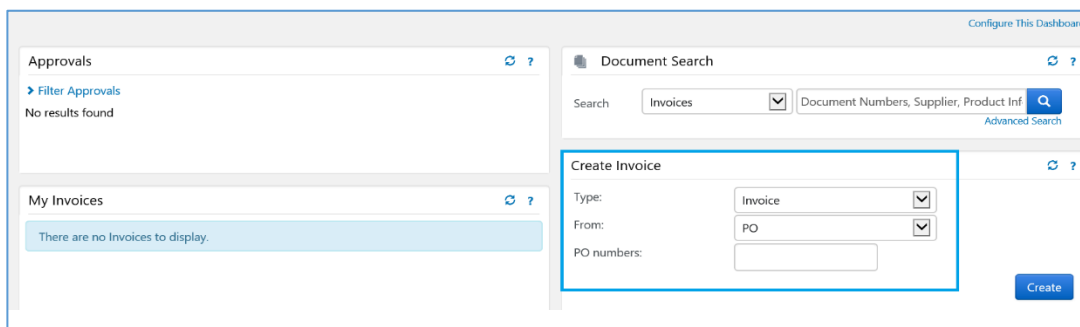## Navigation

Within myUFL, navigate to:

⇨ Nav Bar
⇨ Main Menu
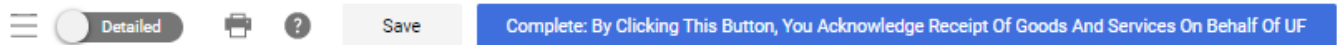⇨ My Self Service
⇨ myUF Marketplace

## 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

| Entry | Summary | Matching | Supplier Messages | Comments 1 | Attachments 1 | History |

| | | |
|---|---|---|
| Invoice Date | 9/23/2021 | |
| | mm/dd/yyyy | |
| Supplier Name | **Jasons Deli** | |
| Terms | 0% 0, Net 10 | |
| Terms Discount | 0.00 USD | |
| Invoice Type | **Invoice** | |
| Record No. | | |
| Supplier Invoice No. * | 13k599 | |
| Business Purpose * | Add your business purpose here | |

**Remit To**

PO Box 4869 Dept 271
Houston, Texas 77210-4869

United States
Address Id 1002

**Billing address**

*no address*

External Attachments    Add

Invoice Owner
(Requisitioner)    ★ Elizabeth Pearson
   *Select a different user...*

External Note
[                    ]
1000 characters remaining    expand | clear

*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. * | [                    ] |
| | ❶ 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 * | [                    ] |
| | ❶ 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
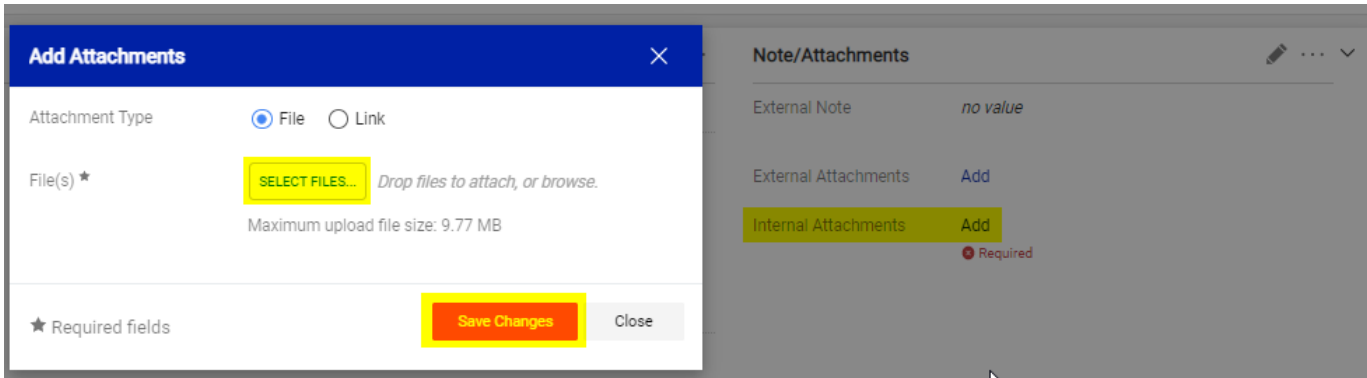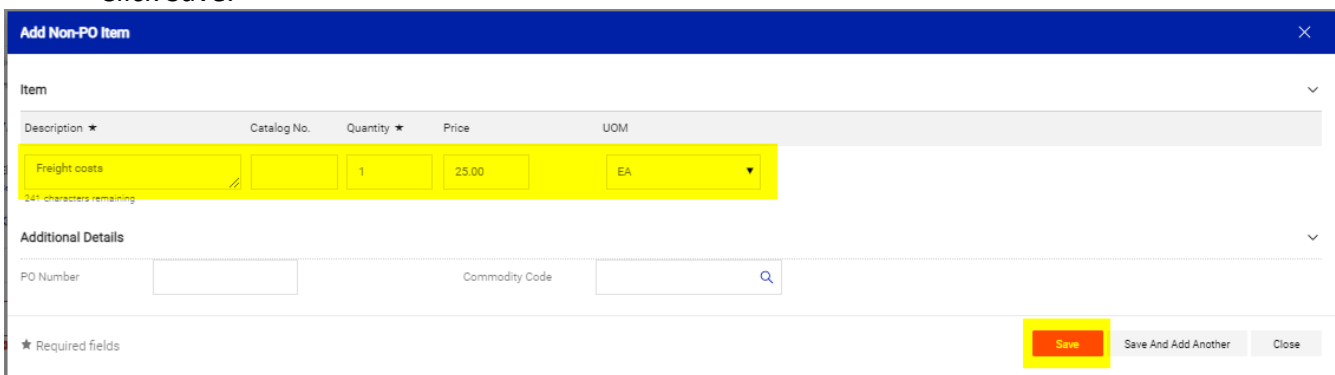


*Per department requests - As of 11/15/21 PO attachments will no longer transfer to invoices

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.
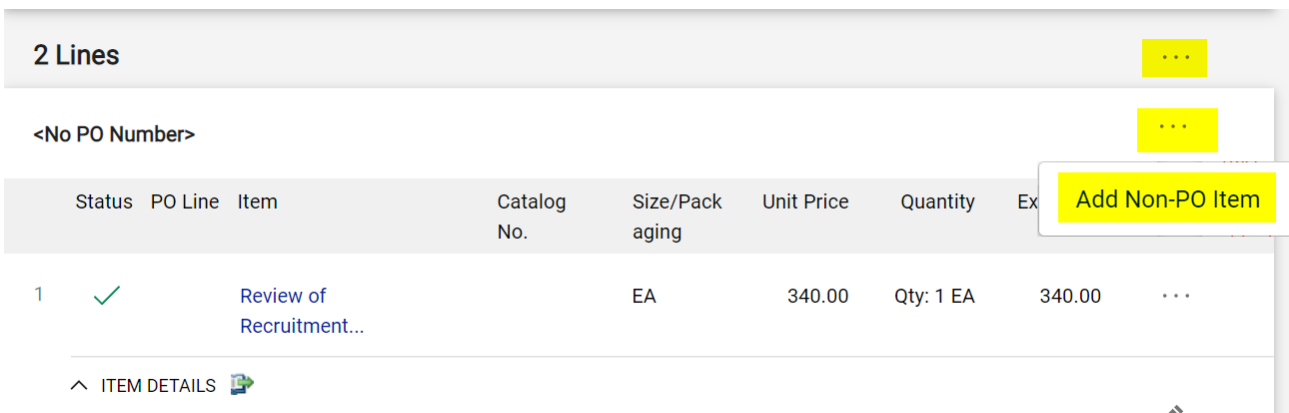


Fill out the form.
Add a Description, Quantity and Price.
Click Save.



**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.

| Line Items | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 2200929586 | | | | | | | | |
| Status | PO Line | Item | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price | |
| 1 | ✓ | 1 US National Sectéra vIPer Universal Secure Phone (with PSTN Connect) | VIPF1000-XAMDM | EA | 2,995.00 | 1 EA | 2,995.00 | |

∧ ITEM DETAILS 📑

Contract:      Select Contract        External Note

PO Number      2200929586        1000 characters remaining    expand | clear

Substitute Item     ✗        External Line Attachments    Add

Override Withholding    ☐

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

Email: myUFMarketplace@ufl.edu

Phone: (352) 392-1335