Creating an Invoice from a Purchase Order

Overview

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

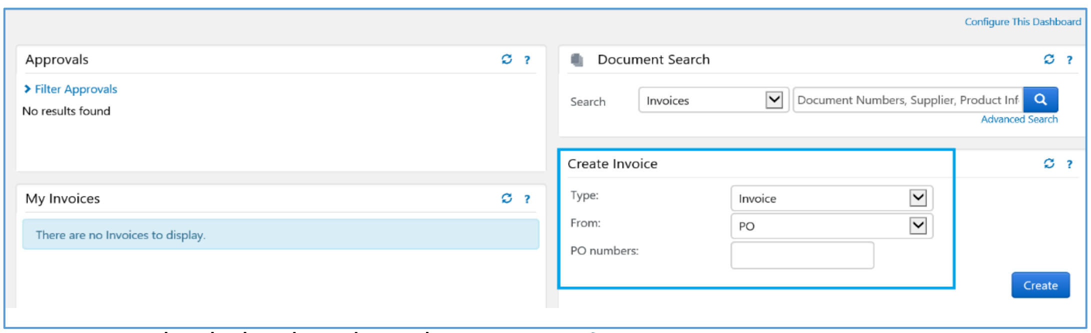
Navigation

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:

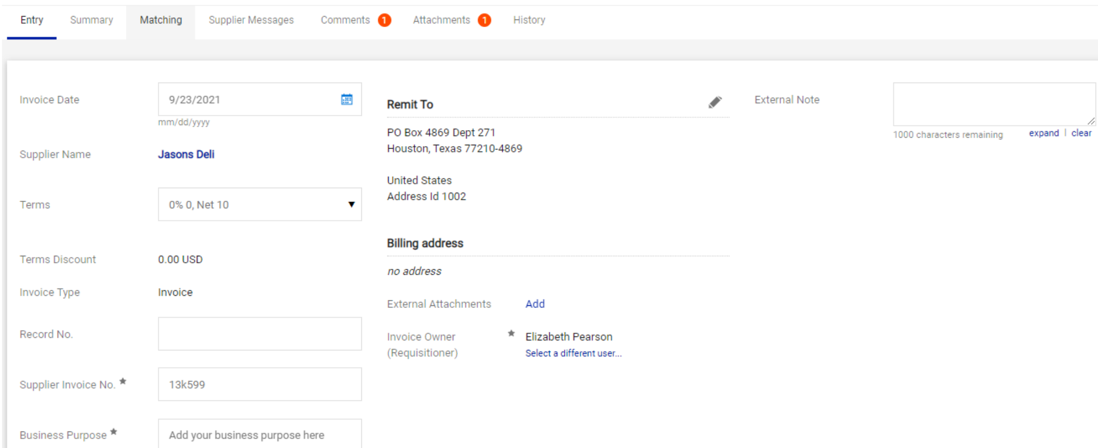


   - Check the dropdown list says **Invoice**.
   - Make sure the *From:* dropdown says **PO**.
   - If it doesn't, click the arrow to change the selection from Non PO to PO.

4. Add the **PO number** to the PO field and click **Create**.

From the Entry Tab with Detailed toggled on:

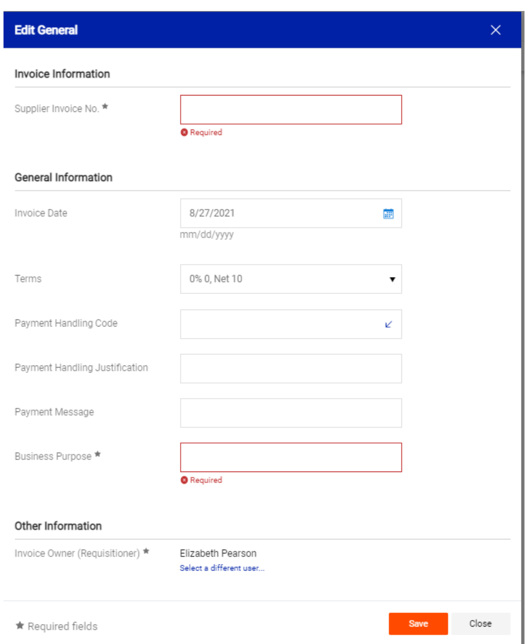
5. When the Invoice opens, edit the **Invoice date** as necessary.
   *Clicking the **Override due date check box** will not change the payment date of the invoice. Payment dates are determined by the agreed supplier payment Terms (Located on the Summary tab)
6. Add the **Supplier Invoice Number**.
7.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

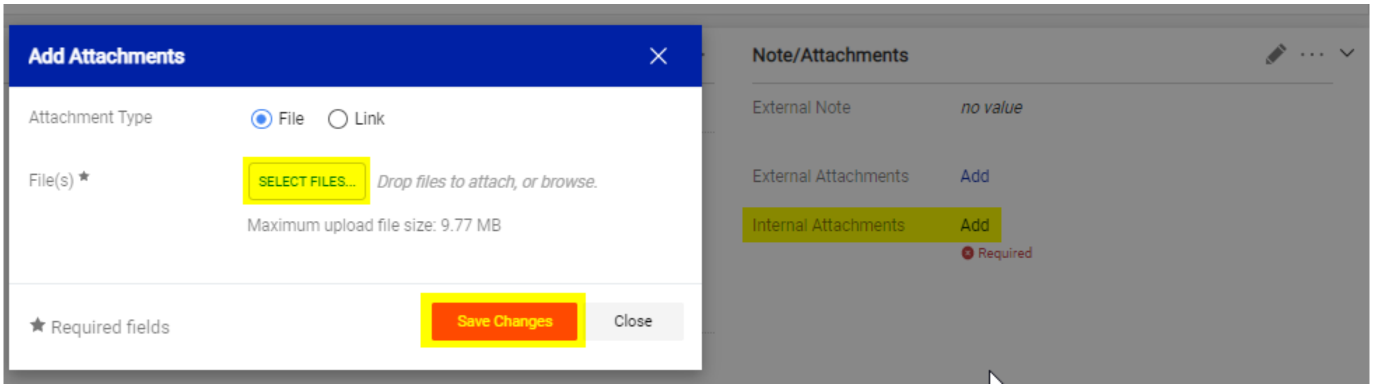
8. On the **Summary tab**, click the pencil icons to edit General and Addresses and click **Add** to add Internal attachments

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.,



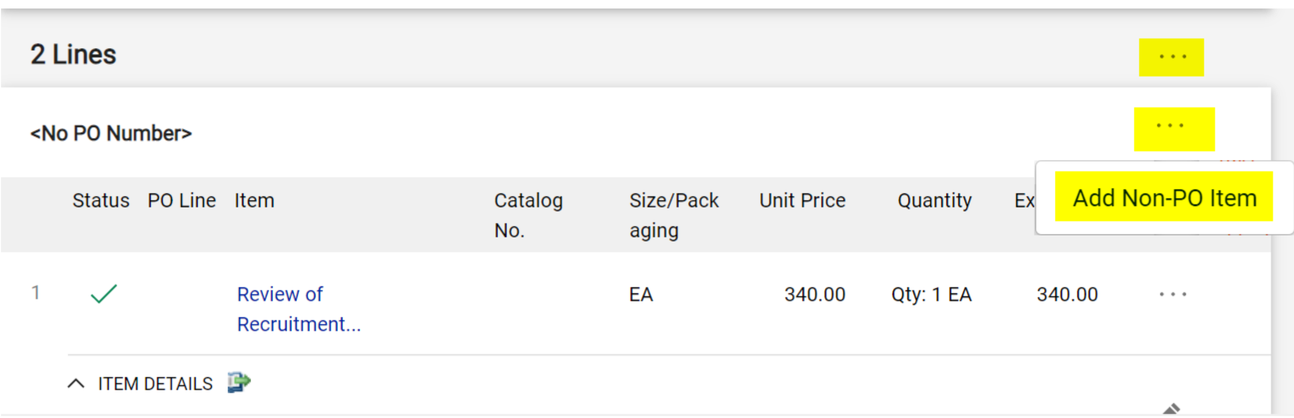
Editing **Addresses** will allow you to change the supplier remit and bill to address of the invoice.

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

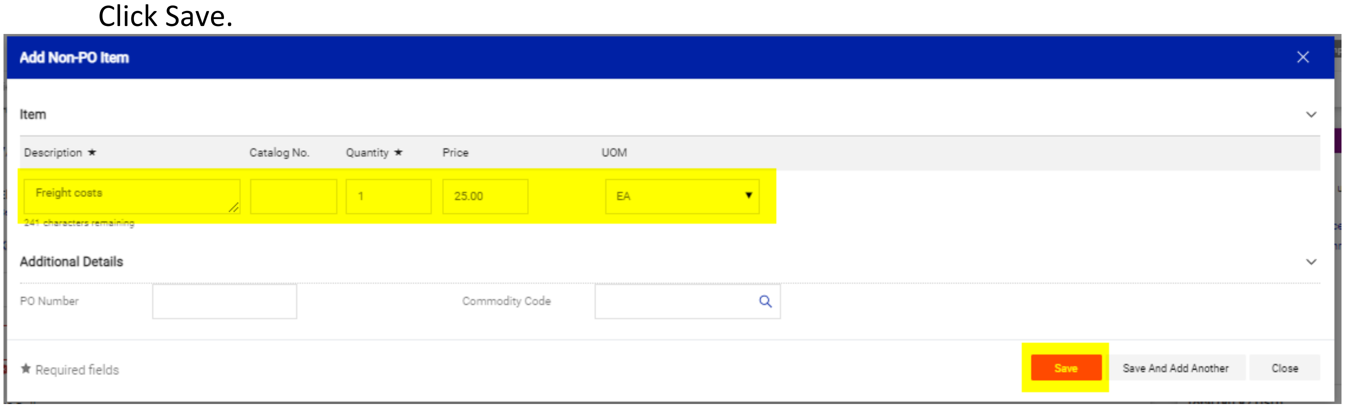


*Per department requests - As of 11/15/21 PO attachments will no longer transfer to invoices

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.

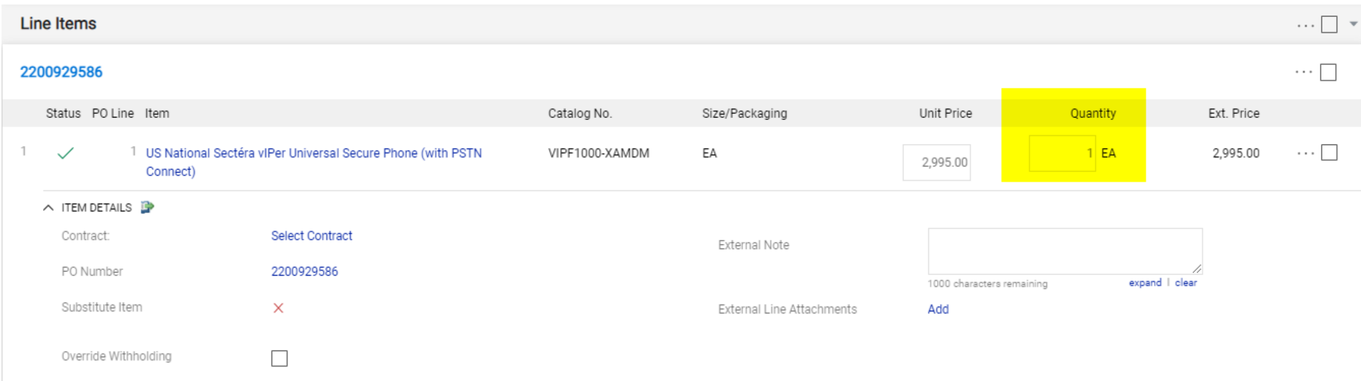


Fill out the form.
Add a Description, Quantity and Price.
Click Save.

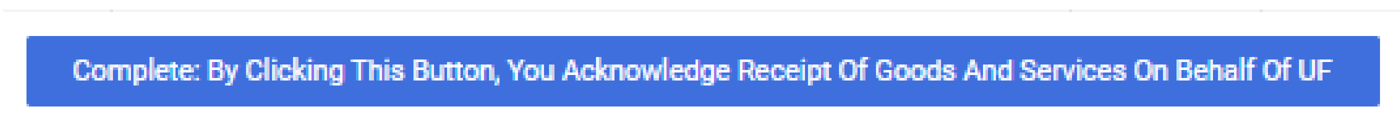


Scroll to check for errors. If you notice a mistake, click on the line description and make adjustments.

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



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.



Additional Assistance

myUF Marketplace – Marketplace Help Desk

Contact Us

Phone: (352) 392-1335