



SUPPLIER REGISTRATION

Invoices

[Abstract](#)

This job aide will show you how to view and create an invoice.

PPL Supplier Enablement Team
[Email address]

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Overview

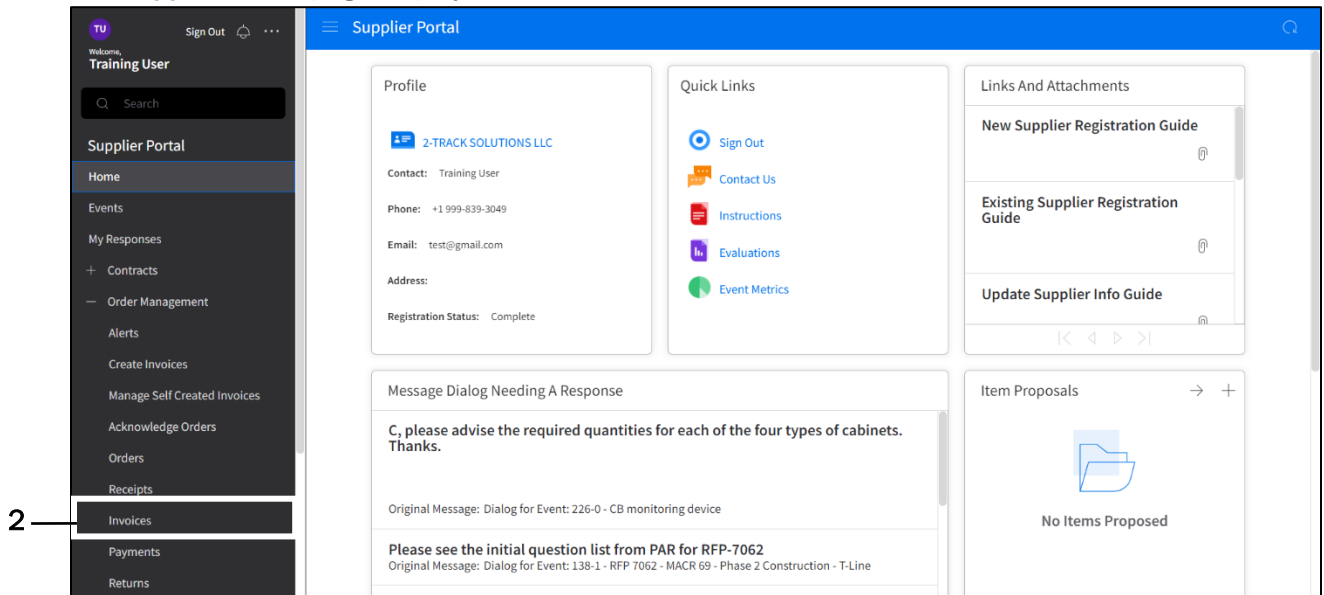
Infor serves as the modern solution for work management, contract, and invoice processing. This document is intended to provide you with a step-by-step guidance on how to view and create an invoice.

By reading this document at its entirety you will be able to:

- View an invoice
- Create an invoice

Viewing an Invoice

1. Enter the Username and Password and click the **Sign On** button.
The **Supplier Portal** page displays.



2. Click **Invoices**.

The **Invoices** page displays.

Dashboard tab allows you to view an invoice and its associated purchase order. From

The screenshot shows the 'Invoices' page with a sidebar on the left and a main content area. The sidebar includes a search bar, 'My Responses', and a list of navigation items: 'Manage Self Created Invoices', 'Acknowledge Orders', 'Orders', 'Receipts', 'Invoices' (highlighted), 'Payments', and 'Returns'. The main content area has tabs for 'Dashboard', 'All', 'Open', 'Paid', 'Exceptions', and 'Overdue'. Under the 'Dashboard' tab, there are sub-tabs for 'All Invoices', 'Start A Dialog', and 'Overview'. The 'Overview' sub-tab shows a list of invoices. Callouts point to specific elements: 'Displays the scheduled pay date on the invoice.' points to the 'Due Date: 5/9/2022' for Invoice E2E-PA_E_1.3. 'This label displays the invoice status.' points to the 'Released' status for the same invoice. 'Double-click on the Invoice to open the Invoice Details page.' points to the 'Invoice E2E-PA_E_1.3' entry in the list. The 'Invoice E2E-PA_E_1.3' details are shown on the right, including 'Invoice Amount: 1,500.00 USD', 'Invoice Date: 3/10/2022', 'Due Date: 5/9/2022', and 'Status: Released'. A 'Double-click' action is indicated by a dashed line from the callout to the 'Invoice E2E-PA_E_1.3' entry in the list.

Status	Definition
Released	Invoice is approved and will pay on the scheduled pay date (invoice date + terms on the purchase order)
Unreleased	This could be a 3-way match invoice (items) where the receipt was not entered yet or a 2-way match invoice (service) that has an error that Accounts Payable needs to work on
Pending Approval	The invoice is in someone's queue for approval
Tax Review Queue	This invoice needs to be reviewed by AP/Tax for taxability

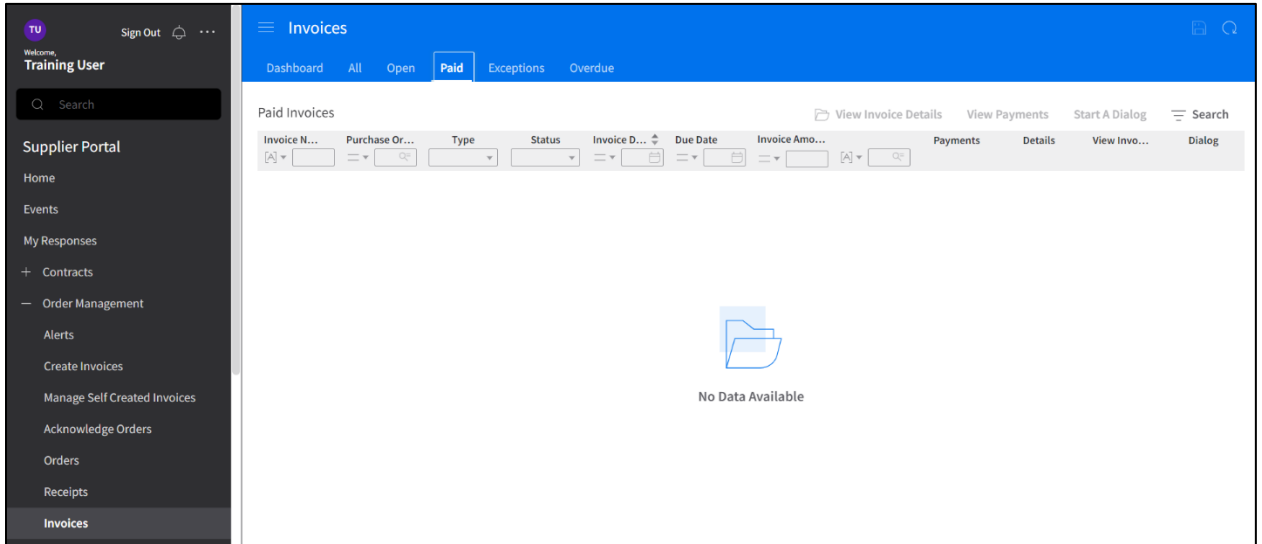
All tab displays all invoices.

Invoice Number	Purchase Order	Type	Status	Invoice Date	Due Date	Invoice Amount	Currency	Details	View Invoice Image	View P...	Dialog
EZE-PA_E_1.3	1000020573	Invoice	Released	3/10/2022	5/9/2022	1,500.00	USD	Details	View Invoice Image		
SU0309	1000020510	Invoice	Unreleased	3/9/2022	5/8/2022	200.00	USD	Details	View Invoice Image		
TESTSR	1000020414	Invoice	Unreleased	3/8/2022	5/7/2022	1,000.00	USD	Details	View Invoice Image		
AP_TESTREV	1000020510	Invoice	Unreleased	3/8/2022	3/8/2022	100.00	USD	Details			
AP_TESTREV1	1000020543	Invoice	Unreleased	3/8/2022	3/8/2022	135.00	USD	Details			
1000020430	1000020430	Invoice	Unreleased	2/24/2022	3/4/2022	100.00	USD	Details			
TEST	1000020414	Invoice	Unreleased	2/18/2022	4/19/2022	175.00	USD	Details			
3245243RF	1000020415	Invoice	Unreleased	2/18/2022	4/19/2022	175.00	USD	Details			
1000013290	1000013290	Invoice	Unreleased	2/17/2022	2/24/2022	10,000.00	USD	Details			
1000013290.2	1000013290	Invoice	Unreleased	2/17/2022	2/25/2022	50.00	USD	Details			

Open tab displays open invoices.

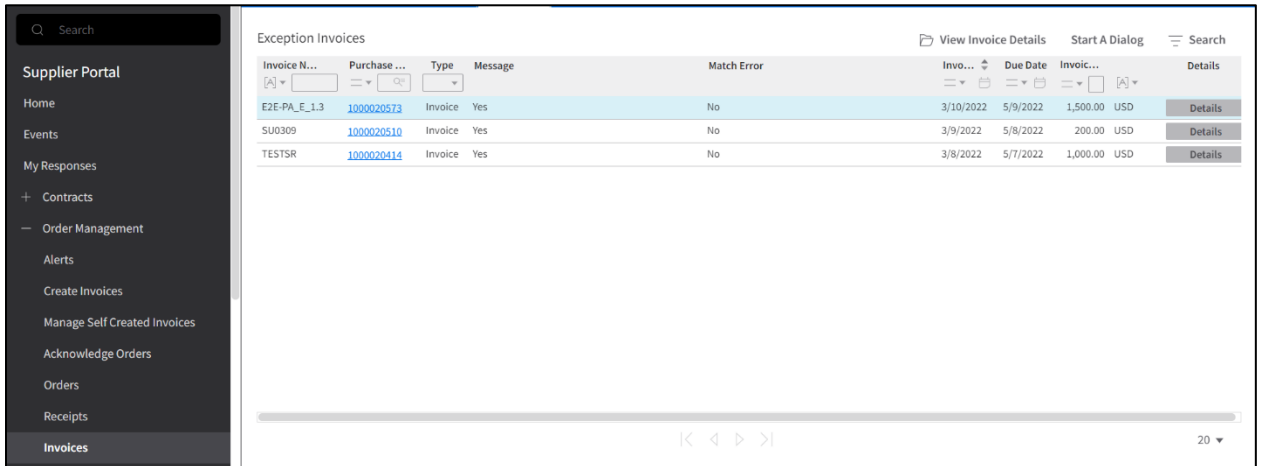
Invoice Number	Purchase Order	Type	Status	Invoice Date	Due Date	Invoice Amount	Currency	Details	View Invoice Image	View P...	Dialog
EZE-PA_E_1.3	1000020573	Invoice	Unreleased	3/10/2022	5/9/2022	1,500.00	USD	Details	View Invoice Image		
CL2022-1234	1000020510	Invoice	Unreleased	3/10/2022	5/9/2022	0.00	USD	Details			
SU0309	1000020510	Invoice	Unreleased	3/9/2022	5/8/2022	200.00	USD	Details	View Invoice Image		
TESTSR	1000020414	Invoice	Unreleased	3/9/2022	5/8/2022	500.00	USD	Details	View Invoice Image		
AP_TESTREV	1000020510	Invoice	Unreleased	3/8/2022	3/8/2022	1,000.00	USD	Details	View Invoice Image		
AP_TESTREV1	1000020543	Invoice	Unreleased	3/8/2022	3/8/2022	100.00	USD	Details			
34TEST	1000020510	Invoice	Unreleased	3/4/2022	5/3/2022	0.00	USD	Details			
24TEST2	1000020510	Invoice	Unreleased	3/4/2022	5/3/2022	131.60	USD	Details			
228TEST	1000020430	Invoice	Unreleased	2/28/2022	4/29/2022	5.00	USD	Details			
228TEST2	1000020415	Invoice	Unreleased	2/28/2022	4/29/2022	0.00	USD	Details			
1000020430	1000020430	Invoice	Unreleased	2/24/2022	3/4/2022	100.00	USD	Details			
1000020430B	1000020430	Invoice	Unreleased	2/24/2022	3/3/2022	100.00	USD	Details			
TEST	1000020414	Invoice	Unreleased	2/18/2022	4/19/2022	175.00	USD	Details			

Paid tab displays paid invoices.



The screenshot shows the 'Invoices' section of the Supplier Portal. The 'Paid' tab is selected, displaying a table for 'Paid Invoices'. The table has columns for Invoice N..., Purchase Or..., Type, Status, Invoice D..., Due Date, Invoice Amo..., Payments, Details, View Invo..., and Dialog. The table is currently empty, showing a 'No Data Available' message with a folder icon.

Exceptions tab displays invoices that have exceptions.



The screenshot shows the 'Invoices' section of the Supplier Portal. The 'Exceptions' tab is selected, displaying a table for 'Exception Invoices'. The table has columns for Invoice N..., Purchase Or..., Type, Message, Match Error, Invo..., Due Date, Invoic..., and Details. The table contains three rows of data.

Invoice N...	Purchase Or...	Type	Message	Match Error	Invo...	Due Date	Invoic...	Details
EZE-PA_E_1.3	1000020373	Invoice	Yes	No	3/10/2022	5/9/2022	1,500.00 USD	Details
SU0309	1000020510	Invoice	Yes	No	3/9/2022	5/8/2022	200.00 USD	Details
TESTSR	1000020414	Invoice	Yes	No	3/8/2022	5/7/2022	1,000.00 USD	Details

The table is followed by a pagination bar showing 20 items.

Overdue tab displays invoices that are past the invoice pay date.

TU

Sign Out

Welcome,

Training User

Q Search

Supplier Portal

Home

Events

My Responses

+ Contracts

— Order Management

Alerts

Create Invoices

Manage Self Created Invoices

Acknowledge Orders

Orders

Receipts

Invoices

Invoices

Dashboard

All

Open

Paid

Exceptions

Overdue

Past Due Invoices

View Invoice Details

Attach Proof of Delivery

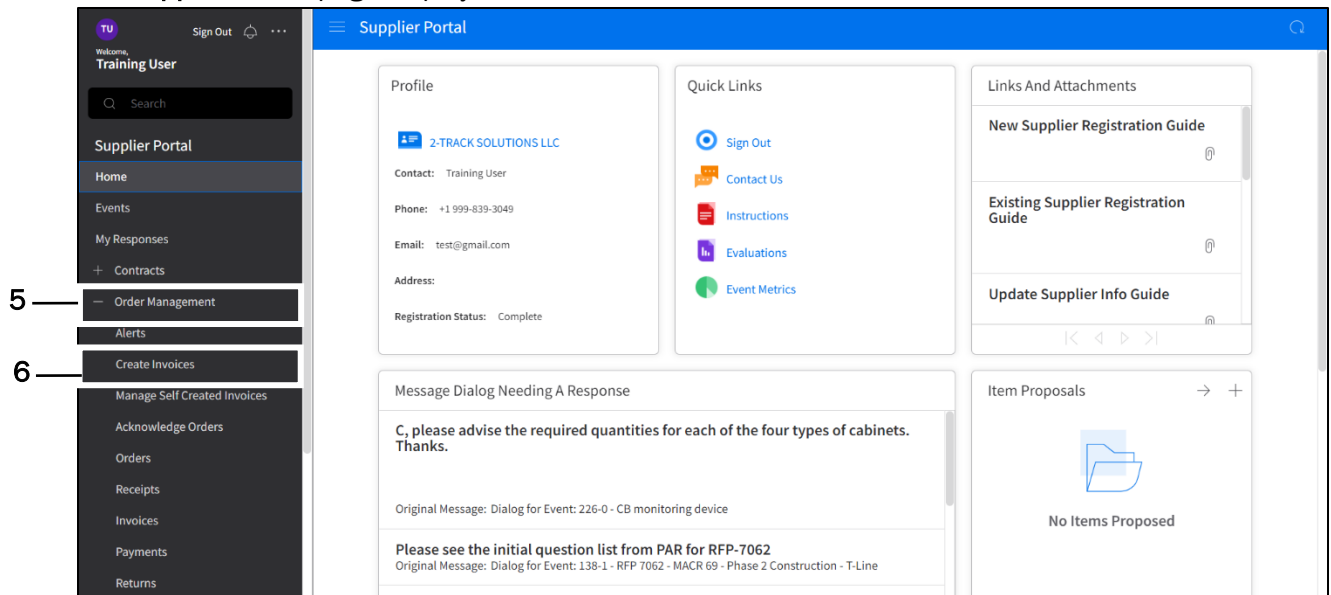
Start A Dialog

Search

Invoice Number	Purchase Order	Type	Invoice D...	Due Date	Days Past...	Invoice Amo...	Details	View In...	View P...	Dialog
AP_TESTREV	1000020510	Invoice	3/8/2022	3/8/2022	3	100.00 USD	Details			
AP_TESTREV1	1000020543	Invoice	3/8/2022	3/8/2022	3	135.00 USD	Details			
1000020430	1000020430	Invoice	2/24/2022	3/4/2022	7	100.00 USD	Details			
1000020430B	1000020430	Invoice	2/24/2022	3/3/2022	8	100.00 USD	Details			
1000013290	1000013290	Invoice	2/17/2022	2/24/2022	15	10,000.00 USD	Details			
1000013290.2	1000013290	Invoice	2/17/2022	2/25/2022	14	50.00 USD	Details			

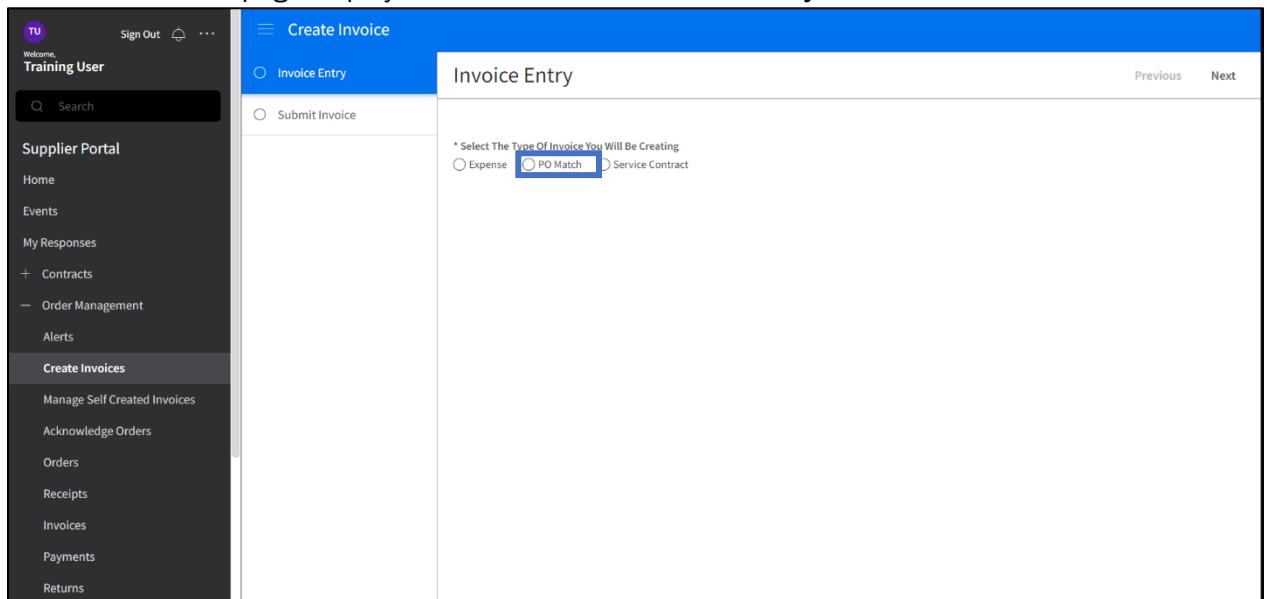
Creating an Invoice

- Enter the Username and Password and click the **Sign On** button.
The **Supplier Portal** page displays.



- Click **Order Management**
- Click **Create Invoices**.

The **Create Invoice** page displays and defaults to the **Invoice Entry** tab.



6. Select **PO Match**.

(Note: Always select PO Match. **Do not use the Expense or Service Contract options.**)

The **Invoice Entry** tab displays.

The screenshot shows the 'Create Invoice' interface with the 'Invoice Entry' tab selected. The form contains the following fields and sections:

- Company:** A dropdown menu with '2041' selected.
- Invoice Number:** A text input field.
- Purchase Order:** A text input field with a search icon.
- Select To Create Details For All Open PO Lines:** A checkbox with the text 'Otherwise, You Will Be Asked To Select Which Lines To Invoice'.
- Description:** A text input field.
- Invoice Date:** A date picker field.
- Invoice Amount Including Tax:** A text input field, highlighted with a blue box.
- Tax Amount:** A text input field, highlighted with a blue box.
- Please attach a scanned copy of the invoice:** A section with an 'Invoice Image' label and a file upload button.
- Optionally attach a scanned proof of delivery document:** A section with a 'Proof Of Delivery' label and a file upload button.

Note: Ensure that you are entering the amount including tax on this first screen.

The second screen (following this) will ask you for the amount without tax.

7. Enter data in the fields

- | | |
|---|---|
| • Company | Enter the company code. |
| • Invoice Number | Enter the invoice number. |
| • Purchase Order | If you selected the incorrect company, your purchase order will not appear in the search list. |
| • Select to Create Details For All Open Lines | Do not select this check box if you are not invoicing for all lines on the PO. If this checkbox is not selected, the next screen will ask you to handpick the lines you are invoicing for. |
| • Description | This field is optional. |
| • Invoice Amount | Enter the invoice amount including the tax. |
| • Tax Amount | Enter only the tax amount for the invoice. If you leave Tax Amount blank or enter 0, the system will treat this as an invoice with no tax on it. |
| • Invoice Date | Always use today's date. |
| • Invoice Image | Attaching an image of the invoice is a requirement. |
| • Proof of Delivery | This is optional but recommended. |

9. Click **Next**.

The **Purchase Order Line Information** page displays.

Create Invoice

Invoice Entry
Purchase Order Line Information
Submit Invoice

Purchase Order Line Information Previous Next

To add a line, use Create Detail. If making changes to a line, click the Save button after changes have been made.

Invoice Details Save Delete ...

	Vendor Item	Item Description	Quantity	UOM	Unit Cost	Total Functional A...
<input type="checkbox"/>	TEST34	Test34	2.000	EA	100.000	200.00
Total						200.00

< > 20

10. Select the lines to include in the invoice (unless you checked off the checkbox to include all on the previous screen).

- **Important**—If you can't find the line or the line contains incorrect information, contact the buyer/category manager.
- If you invoice services instead of material, **enter the dollar amount without tax** in the Quantity column. If you add the full amount with tax here, you will receive an error message, as the numbers will not match.
- If you need to remove a line, select the line, and click delete

Purchase Order Line Information Previous Next

To add a line, use Create Detail. If making changes to a line, click the Save button after changes have been made.

Invoice Details Save Delete ...

	Vendor Item	Item Description	Quantity	UOM	Unit Cost	Total Functional A...
<input checked="" type="checkbox"/>	TEST34	Test34	2.000	EA	100.000	200.00
Total						200.00

- You can update the **Quantity**; however, changes to the **Unit Cost** will not match the purchase order cost.
- The amount in the **Total Functional Amount** field must show **Invoice Amount without tax**. Otherwise, you will not be able to submit the invoice.

- If you did not check the **Select to Create Details For All Open Lines** check box on the **Invoice Entry** tab, the **Purchase Order Line Information** tab will be empty. Click **Create Details from PO line** to select the lines you are invoicing.

Create Invoice

Invoice Entry | **Purchase Order Line Information** | Submit Invoice

Previous Next

To add a line, use Create Detail. If making changes to a line, click the Save button after changes have been made.

Invoice Details

Create Detail From PO Line Save Delete ...

	Vendor Item	Item Description	Quantity	UOM	Unit Cost	Total Functional A...
No Data Available						

Select

Available Purchase Order Lines

	Purchase Order Line	Item	Description	Vendor Item	UOM	Quantity To Invoice	Unit Cost	PO Line Amount	
<input type="checkbox"/>	1	TEST34	Test34	TEST34	EA	2.000	100.000	200.000	USD

Close Create Detail From PO Line

11. Click **Next**.

Note: If the page did not load after you clicked “Next”, refresh your screen.

The **Submit Invoice** tab displays.

Create Invoice

Invoice Entry | Purchase Order Line Information | **Submit Invoice**

Previous Next

Company
2041

Invoice Number
CL2022-1234

Invoice Amount
0.00

Click the Submit button to submit this Invoice immediately.

Submit

Click the link below to view the invoice

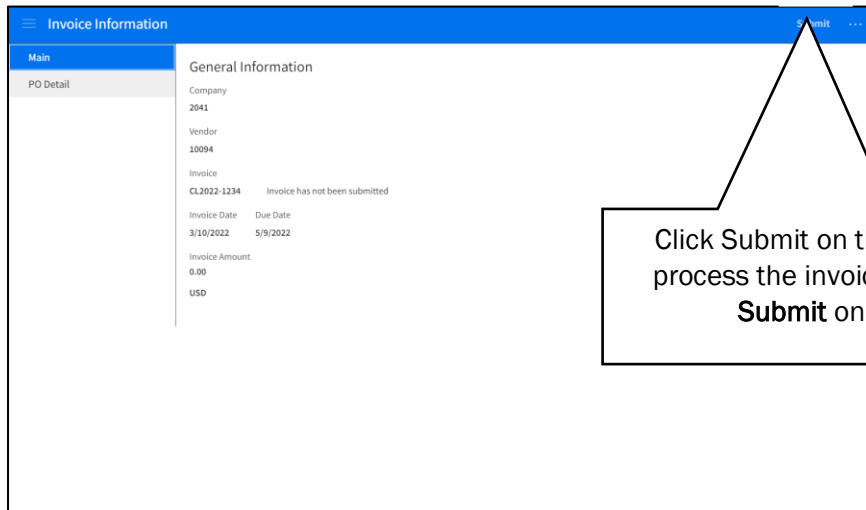
[View Invoice](#)

The invoice can also be viewed any time in manage self created invoices

12. Click **Submit**.

Note: You can click **View Invoice** to display the invoice information again before submitting. The Invoice Information page displays.

Main tab



Invoice Information

Main

General Information

Company
2041

Vendor
10094

Invoice
CL2022-1234 Invoice has not been submitted

Invoice Date
3/10/2022

Due Date
5/9/2022

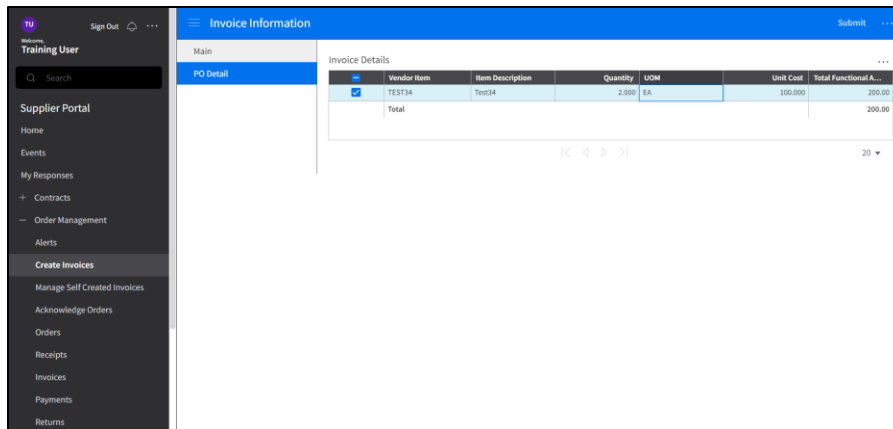
Invoice Amount
0.00

USD

Submit

Click Submit on the **Invoice Information** page to process the invoice. This is the same as clicking **Submit** on the **Submit Invoice** tab.

PO Details tab



Invoice Information

PO Detail

Invoice Details

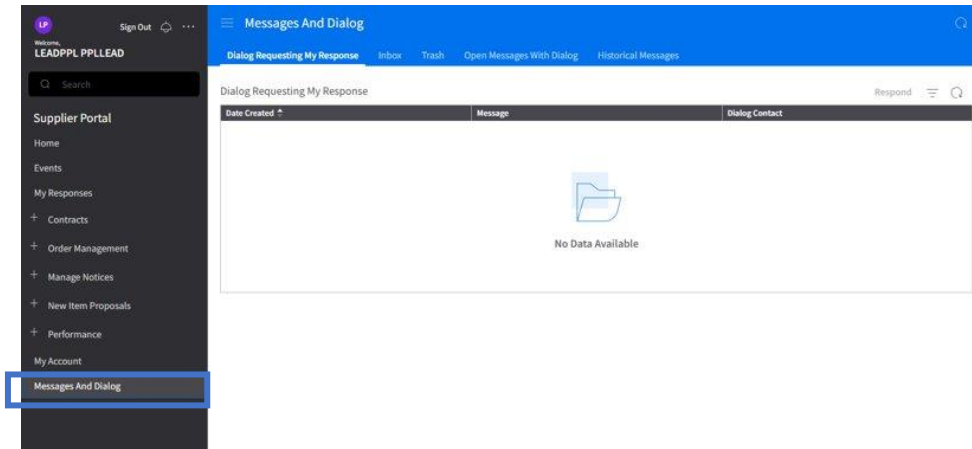
Vendor Item	Item Description	Quantity	UOM	Unit Cost	Total Functional A...
TEST34	Test34	2.000	EA	100.000	200.00
Total					200.00

Submit

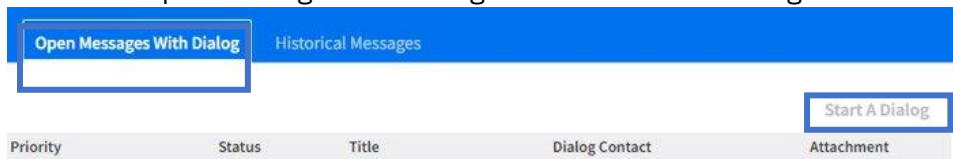
Adding Freight Charges

- There is currently no existing feature that will allow suppliers to add freight in a clean way. While PPL works to add this feature to the Supplier Portal, please follow the workaround below:

Message the buyer through the portal alerting them you need to add freight charges. To navigate to messages, click on Messages and Dialog.



Then click “Open Messages with Dialog” and click “Start a Dialog”.



The buyer will then amend the Purchase Order to show freight as an additional line. Once this is completed, you can go back to your PO and invoice freight charges on that separate line.