



SUPPLIER REGISTRATION

Invoices

[Abstract](#)

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

PPL Supplier Enablement Team

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February 1, 2023

Overview

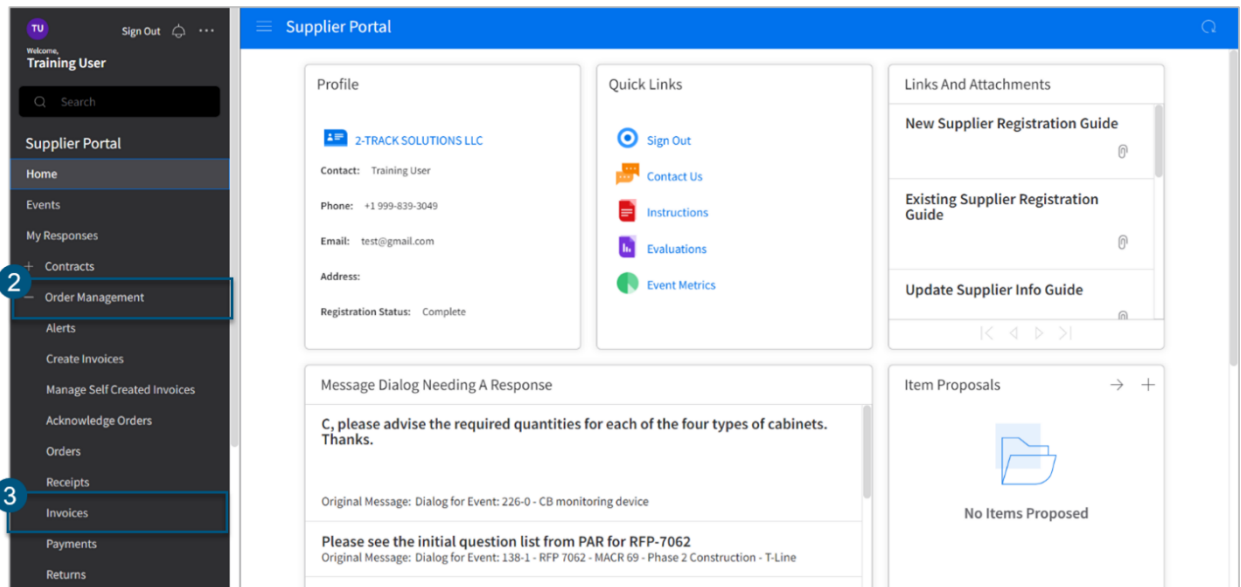
Infor serves as the modern solution for work management, contract, and invoice processing. This document is intended to provide you with step-by-step guidance on how to view and create an invoice.

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

- View an invoice
- Create an invoice
- Update an unsubmitted invoice
- Submit an unsubmitted invoice
- Delete an unsubmitted invoice

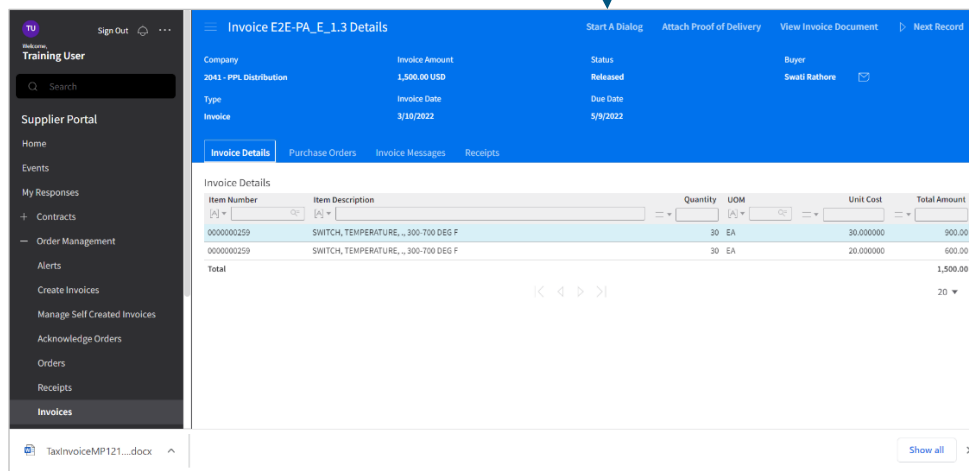
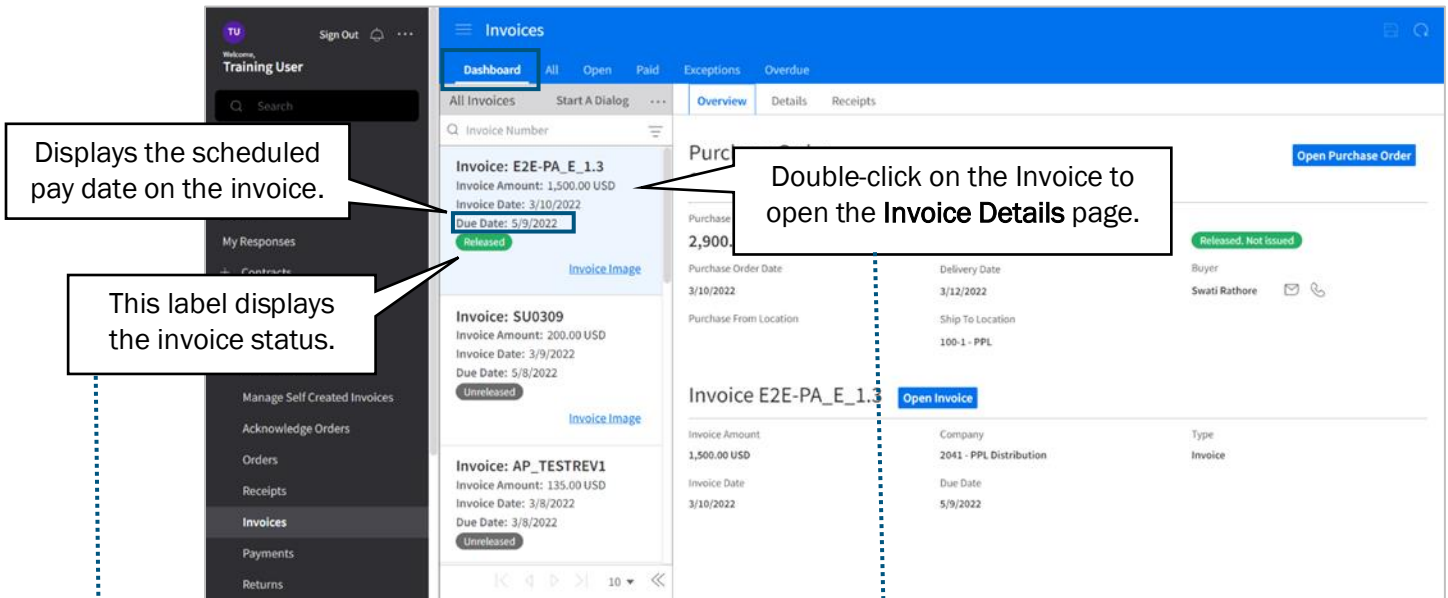
Viewing an Invoice

1. Enter the Username and Password and click the **Sign On** button.
The **Supplier Portal** page displays.
2. Expand **Order Management**
3. select **Invoices**



4. The Invoices page displays. Below is a summary of each tab on the Invoice page.

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



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
Historical	This invoice has been paid

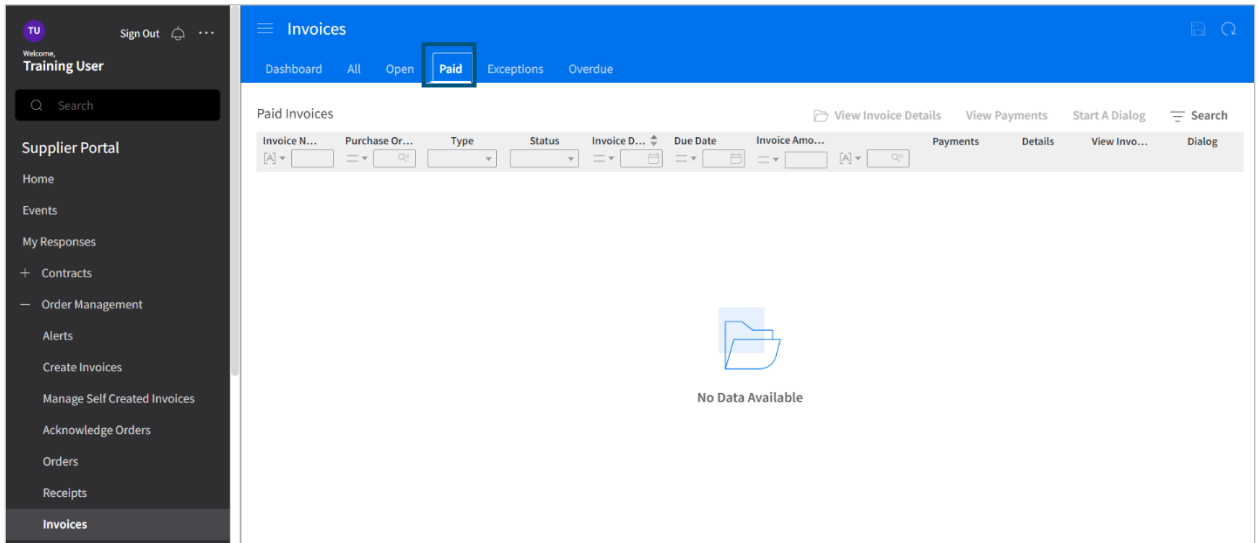
All tab displays all invoices.

Invoice Number	Purchase Order	Type	Status	Invoice Date	Due Date	Invoice Amount	Currency	Details	View Invoice Image	View P...	Dialog
EDI-PA_E_L3	200020572	Invoice	Released	3/9/2022	5/9/2022	1,000.00	USD	Details	View Invoice Image		
54309	200020512	Invoice	Unreleased	3/9/2022	5/9/2022	200.00	USD	Details	View Invoice Image		
TEST98	200020418	Invoice	Unreleased	3/8/2022	5/7/2022	1,000.00	USD	Details	View Invoice Image		
AP_TEST98E	200020512	Invoice	Unreleased	3/8/2022	3/8/2022	100.00	USD	Details			
AP_TEST98V5	200020512	Invoice	Unreleased	3/8/2022	3/8/2022	100.00	USD	Details			
200020430	200020430	Invoice	Unreleased	2/24/2022	3/4/2022	200.00	USD	Details			
TEST	200020418	Invoice	Unreleased	2/18/2022	4/15/2022	175.00	USD	Details			
200020488	200020418	Invoice	Unreleased	2/18/2022	4/15/2022	175.00	USD	Details			
200021295	200021295	Invoice	Unreleased	2/17/2022	2/24/2022	10,000.00	USD	Details			
200021295.2	200021295	Invoice	Unreleased	2/17/2022	2/25/2022	90.00	USD	Details			

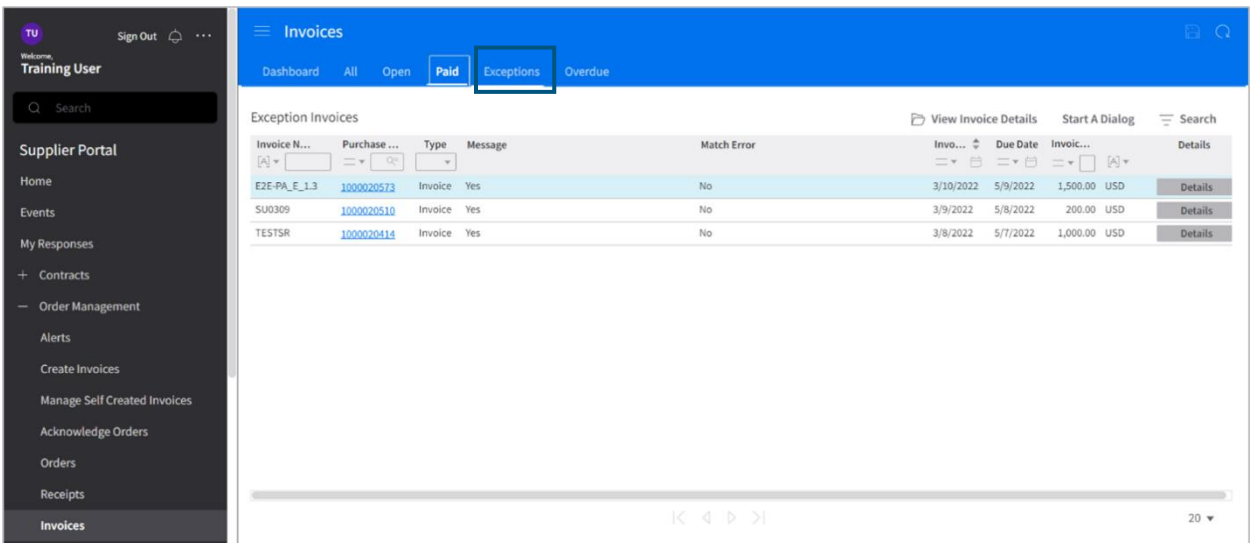
Open tab displays open invoices.

Invoice Number	Purchase Order	Type	Invoice Date	Due Date	Invoice Amount	Currency	Details	View Invoice Image	View P...	Dialog
EDI-PA_E_L3	200020572	Invoice	3/9/2022	5/9/2022	1,000.00	USD	Details	View Invoice Image		
CL2022-1234	200020512	Invoice	3/9/2022	5/9/2022	0.00	USD	Details			
54309	200020512	Invoice	3/9/2022	5/9/2022	200.00	USD	Details	View Invoice Image		
TEST500308	200020418	Invoice	3/8/2022	5/9/2022	100.00	USD	Details	View Invoice Image		
TEST98	200020418	Invoice	3/8/2022	5/7/2022	1,000.00	USD	Details	View Invoice Image		
AP_TEST98E	200020512	Invoice	3/8/2022	3/8/2022	100.00	USD	Details			
AP_TEST98V5	200020418	Invoice	3/8/2022	3/8/2022	100.00	USD	Details			
347137	200020512	Invoice	3/4/2022	5/2/2022	0.00	USD	Details			
2478372	200020512	Invoice	3/4/2022	5/2/2022	221.90	USD	Details			
208787	200020430	Invoice	2/28/2022	4/28/2022	0.00	USD	Details			
2287872	200020418	Invoice	1/28/2022	4/28/2022	0.00	USD	Details			
200020430	200020430	Invoice	2/24/2022	3/4/2022	200.00	USD	Details			
200020430B	200020430	Invoice	2/24/2022	3/3/2022	100.00	USD	Details			
TEST	200020418	Invoice	2/18/2022	4/15/2022	175.00	USD	Details			

Paid tab displays paid invoices.



Exceptions tab displays invoices that have exceptions.



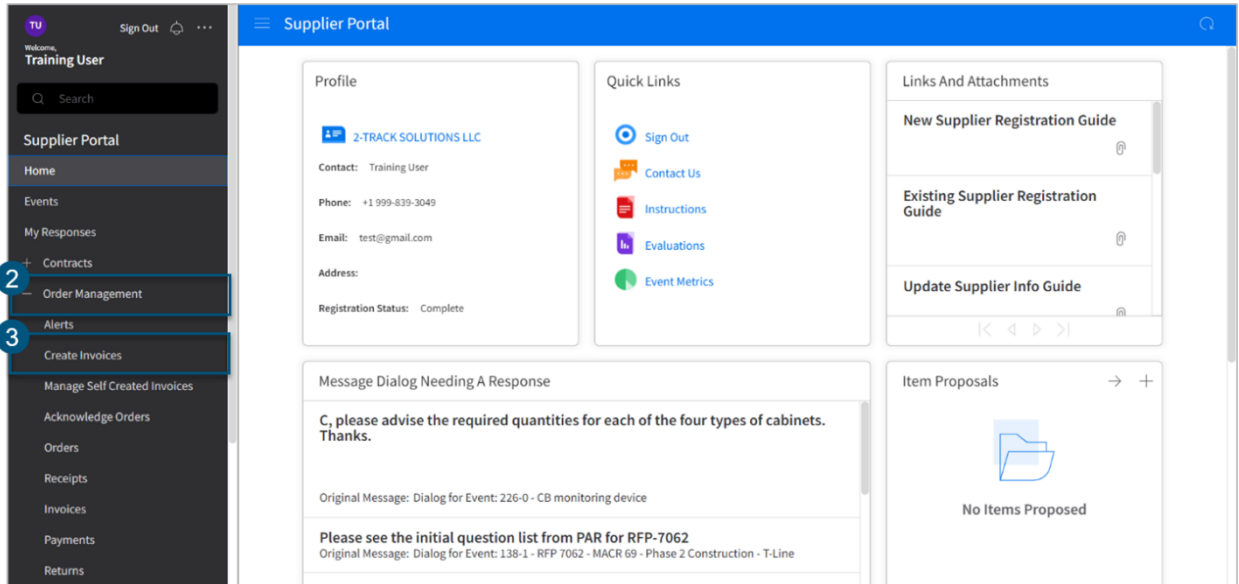
Overdue tab displays invoices that are past the invoice pay date.

The screenshot shows a web application interface for 'Invoices'. The top navigation bar includes 'Dashboard', 'All', 'Open', 'Paid', 'Exceptions', and 'Overdue' (which is highlighted). Below the navigation bar, there is a search bar and a list of 'Past Due Invoices'. The table has the following columns: Invoice Number, Purchase Order, Type, Invoice D..., Due Date, Days Past..., Invoice Amo..., and Details. The data rows are as follows:

Invoice Number	Purchase Order	Type	Invoice D...	Due Date	Days Past...	Invoice Amo...	Details
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

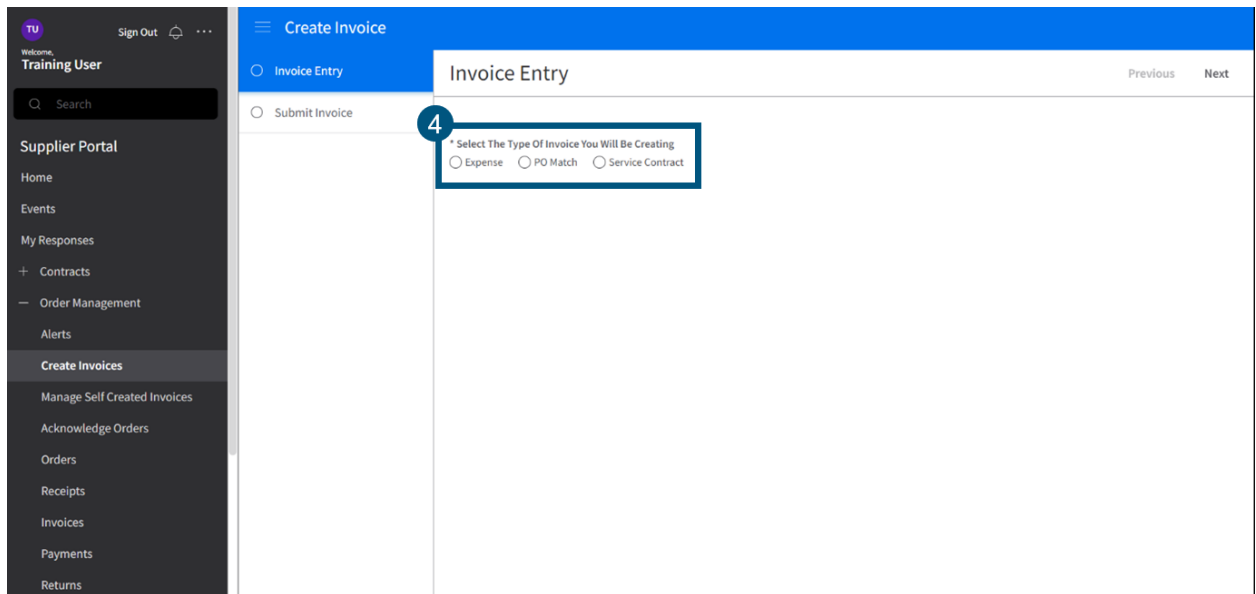
Creating an Invoice

1. Enter the Username and Password and click the **Sign On** button. The **Supplier Portal** page displays.
2. Expand **Order Management**
3. Select **Create Invoices**



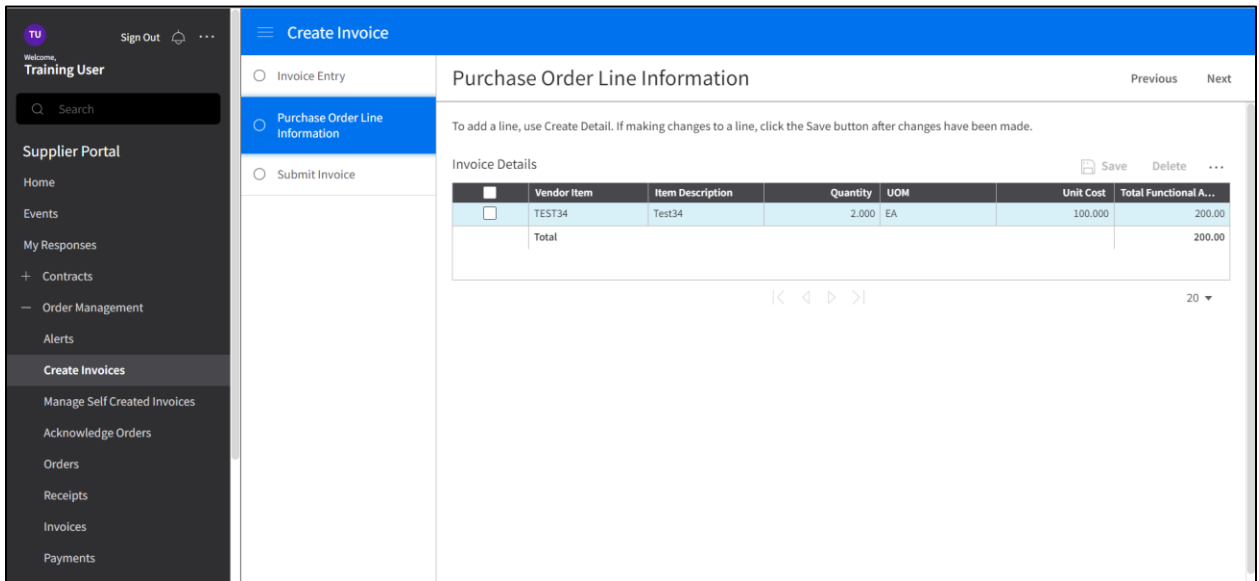
The **Create Invoice** page displays and defaults to the **Invoice Entry** Tab

4. If prompted, select the **Type of Invoice**
Note: Always select **PO Match**. Do not use the **Expense** or **Service Contract** options.

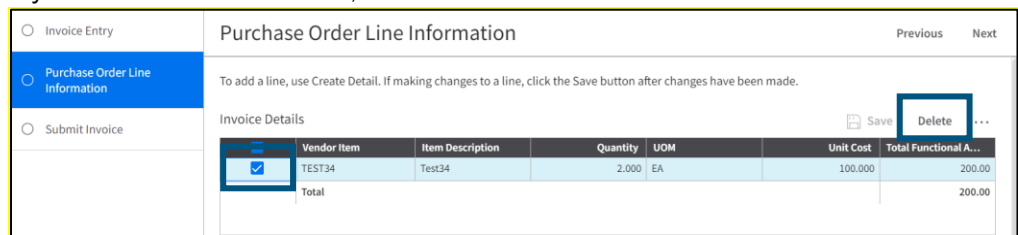


5. On the **Invoice Entry Tab**, complete the following fields:
 - a. **Purchase Order:** Select the correct purchase order.
TIP: If you selected the incorrect company, your purchase order would not appear in the search list.
 - b. **Invoice Number:** Enter the invoice number.
 - c. **Select to Create Details for All Open Items:** Only check this box if you are invoicing for all lines on the Purchase Order.
 - d. **Description:** This field is optional.
 - e. **Invoice Amount including Tax:** Enter the invoice amount including the tax.
TIP: Ensure you are entering the amount including tax here. The next step will also you to enter the amount without tax.
 - f. **Tax Amount:** Enter only the tax amount for the invoice.
TIP: If you leave Tax Amount blank or enter 0, the system will treat this as an invoice with no tax on it.
 - g. **Invoice Date:** Always use today's date.
 - h. **Invoice image:** Attaching an image of the invoice is a requirement
 - i. **Proof of Delivery:** Attached a proof-of-delivery document.
 This is optional but recommended.

6. Click **Next**.
7. Refresh your browser to load **Purchase Order Line Information**
TIP: If the page did not load after you clicked “Next”, refresh your screen.

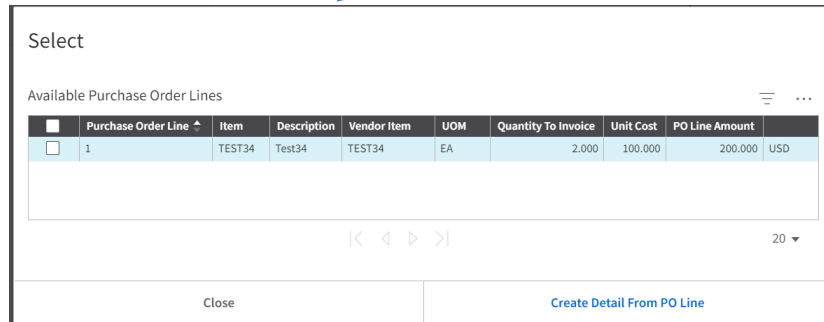
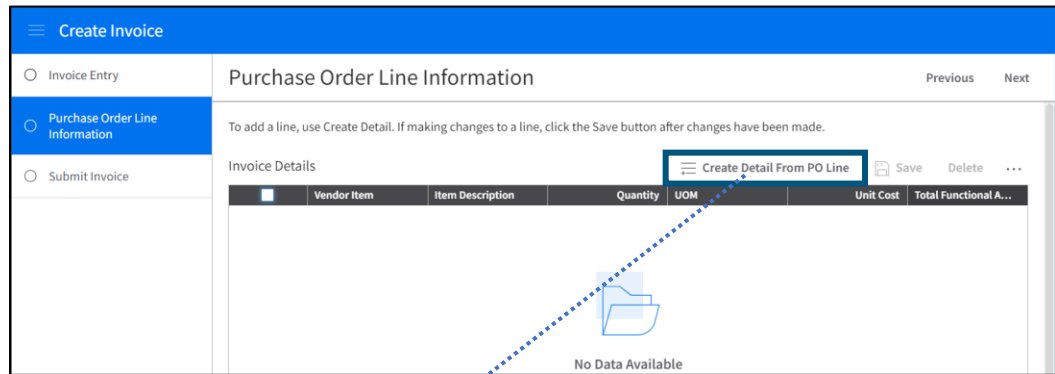


8. Follow the instructions below based on your selection for **Step 5c**:
 - a. If you **DID** select the “**Create Detail for All Lines**” options:
 - i. **Important:** If you can’t find the line or the line contains incorrect information, contact the buyer/category manager.
 - ii. If you invoice services instead of materials, **enter the dollar amount without tax** in the **Quantity**.
 - If you add the full amount with tax here, you will receive an error message as the numbers will not match.
 - iii. If you need to remove a line, select the line and click **delete**

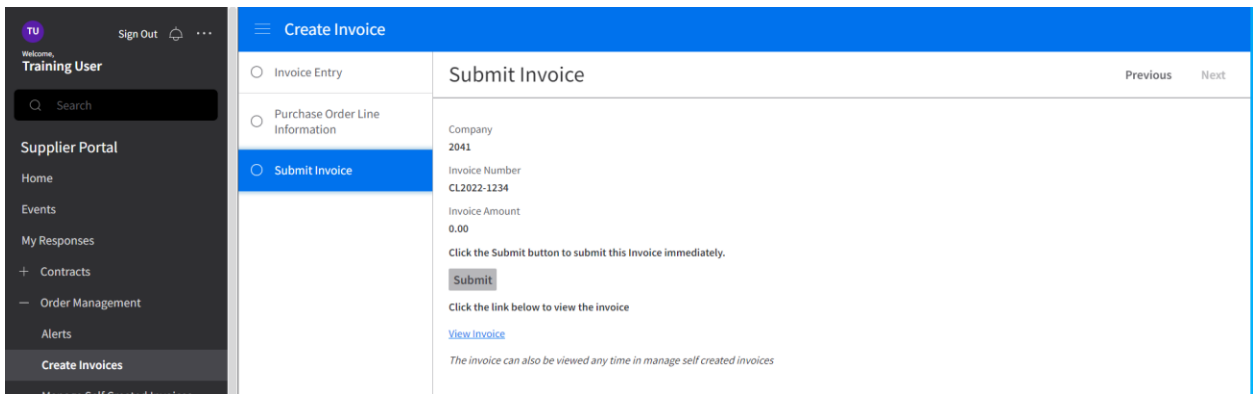


- iv. You can update the **Quantity (Dollar Amount)**
 - Changes to the **Unit Cost** will not match the purchase order cost.
 - For Services, the **Unit Cost** should always be 1
- v. The amount in the **Total Functional Amount** field must show **Invoice amount without tax**.
 - Otherwise you will not be able to submit the invoice.

- b. If you **DID Not** select the “Create Detail for All Lines” option in **step 5c**:
 - vi. The **Purchase Order Line Information** tab will be empty.
 - vii. Click **Create Details from PO Line** to select the lines you are invoicing.



- 9. Click **Next** to view the **Submit Invoice** tab
TIP: If the page did not load after you clicked “Next”, refresh your screen.

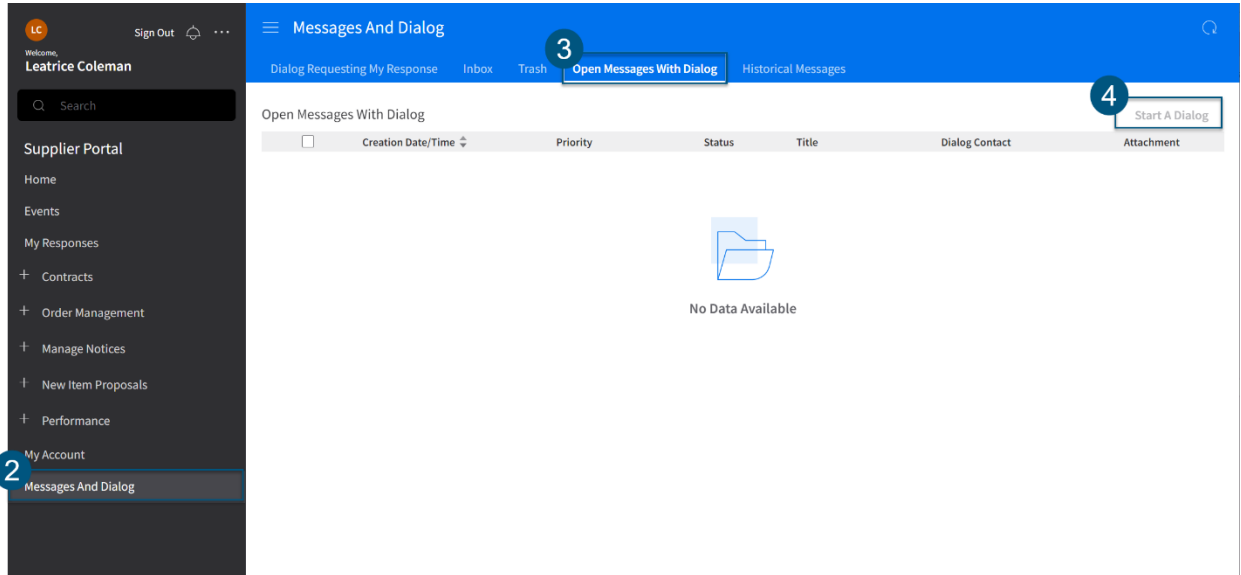


- 10. Click **Submit**
Note: You can click View Invoice to display the invoice information again before submitting.

Adding Freight Charges

Overview: 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:

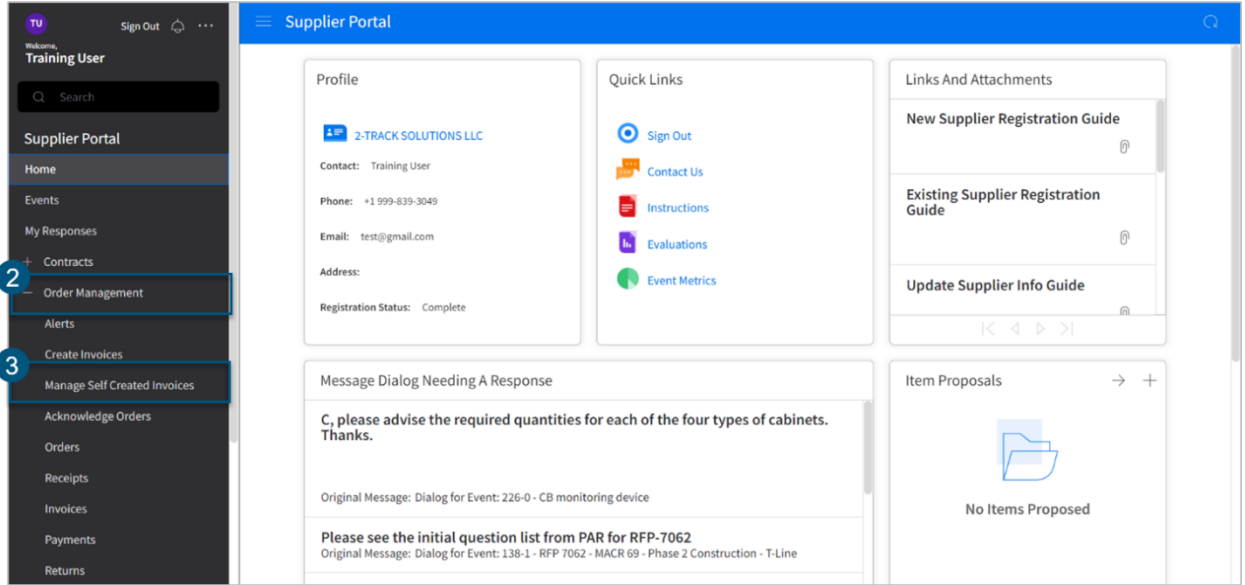
1. Enter the Username and Password and click the **Sign On** button. The **Supplier Portal** page displays.
2. Select **Messages and Dialog**
3. Select **Open Messages with Dialog** tab
4. Select **Start a Dialog**



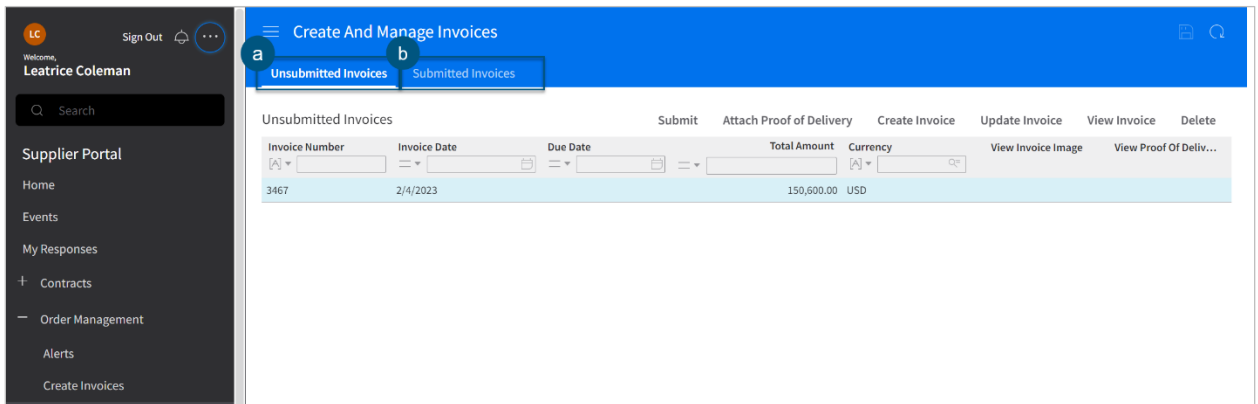
5. The buyer will then amend the Purchase Order to show freight as an additional line.
6. Once this is completed, return to the PO and invoice freight charges on that separate line.

Manage In Process Invoices

1. Enter the Username and Password and click the **Sign On** button. The **Supplier Portal** page displays.
2. Expand **Order Management**
3. Select **Manage Self-Created Invoices**



4. The **Manage Self-Created Invoice** page displays.
 - a. **Unsubmitted Invoices:** PLL has not received this invoice. **Updates** can be made to an invoice, including **deleting** the invoice.
 - b. **Submitted Invoice:** PPL has already received this invoice and edits cannot be made.



5. Under **Unsubmitted Invoice** tab, you can:

The screenshot displays the 'Create And Manage Invoices' interface. On the left is a dark sidebar with the user's name 'Leatrice Coleman' and a 'Supplier Portal' menu. The main area has a blue header with 'Create And Manage Invoices' and two tabs: 'Unsubmitted Invoices' (active) and 'Submitted Invoices'. Below the tabs is a table of 'Unsubmitted Invoices' with columns for Invoice Number, Invoice Date, Due Date, Total Amount, and Currency. A single row is visible with Invoice Number 3467 and Invoice Date 2/4/20. Above the table are several action buttons: 'Submit', 'Attach Proof of Delivery', 'Create Invoice', 'Update Invoice', 'View Invoice', and 'Delete'. Three callouts are present: 'a' points to the 'Submit' button with the text 'Submit an existing Unsubmitted Invoice'; 'b' points to the 'Update Invoice' button with a list of fields to update: Invoice Number, Description, Invoice Date, and Invoice Amount, plus a tip to follow the 'Create an Invoice' steps; 'c' points to the 'Delete' button with the text 'Delete an existing Unsubmitted Invoice'.

Invoice Number	Invoice Date	Due Date	Total Amount	Currency	View Invoice Image	View Proof Of Deliv...
3467	2/4/20					

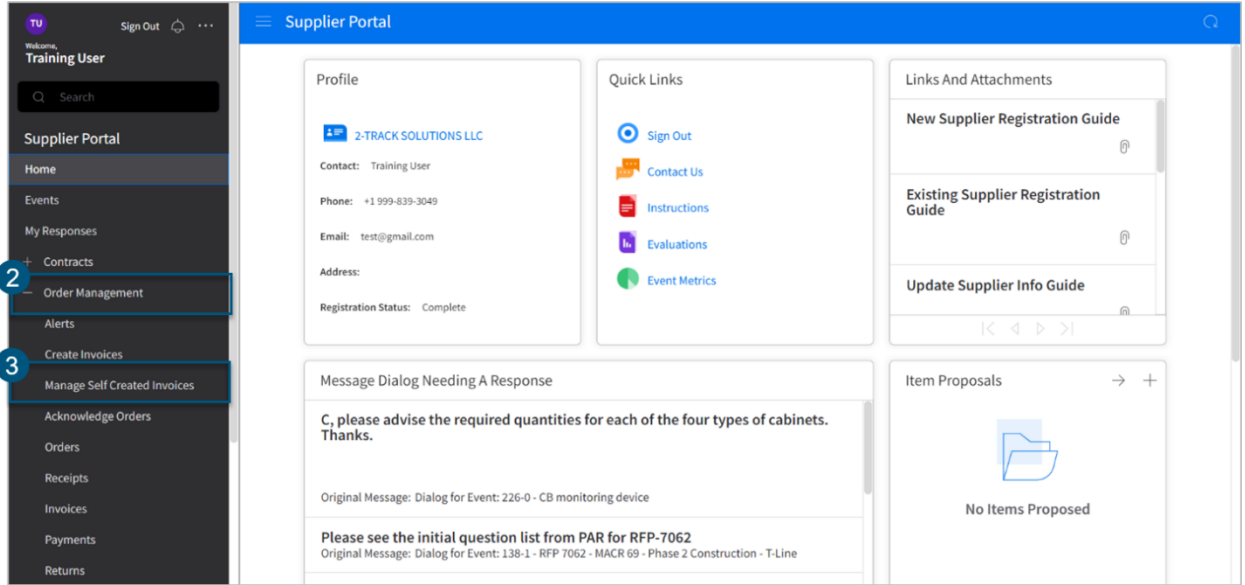
Update the following Invoice fields:

- Invoice Number
- Description
- Invoice Date
- Invoice Amount

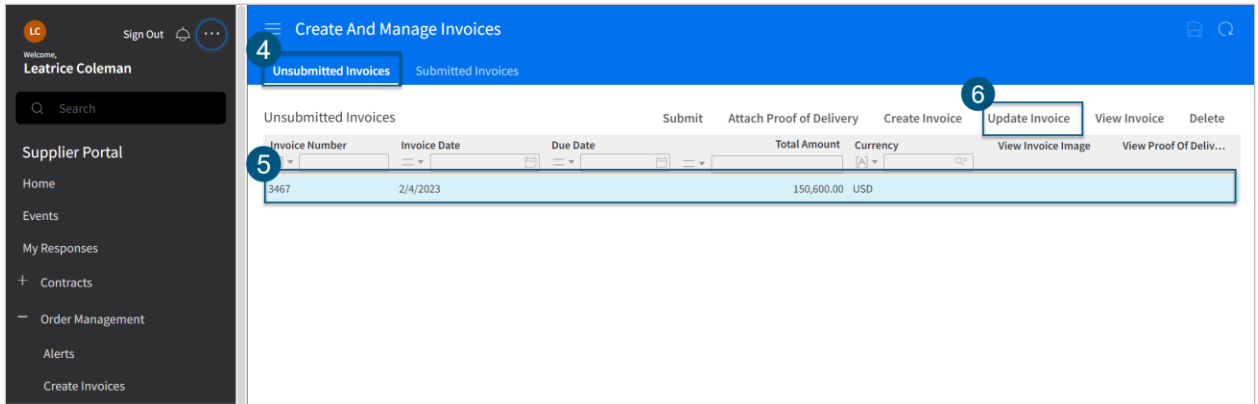
TIP: Follow the Create an Invoice steps

Update an Unsubmitted Invoice

1. Enter the Username and Password and click the **Sign On** button. The **Supplier Portal** page displays.
2. Expand **Order Management**
3. Select **Manage Self-Created Invoices**



4. select **Unsubmitted Invoices**
5. Select an Invoice
6. Select **Update Invoice**



7. The Invoice Entry page displays. Update the fields as needed:
 - a. **Invoice Number:** Enter the invoice number.
 - b. **Description:** This field is optional.
 - c. **Invoice Date:** Always use today's date.
 - d. **Invoice Amount:** Enter the invoice amount including the tax.

The screenshot shows the 'Create Invoice' page in a supplier portal. The sidebar on the left contains the user's name 'Leatrice Coleman' and various navigation options. The main content area is titled 'Create Invoice' and has a sub-header 'Invoice Entry'. Below this, there are two radio buttons: 'Purchase Order Line Information' (selected) and 'Submit Invoice'. The main form area contains the following fields:

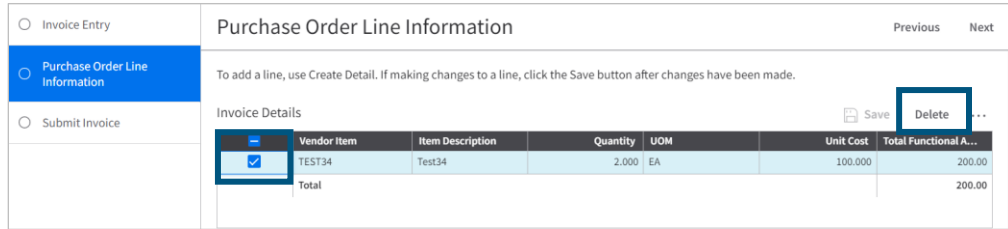
- PO Match invoice**
 - Purchase Order: 0000308296
 - a** Invoice Number: 3467
 - Company: 2041 PPL Distribution
 - b** Description: Test
 - c** Invoice Date: 2/4/2023
 - d** Invoice Amount: 150,600.00

8. Click **Next**

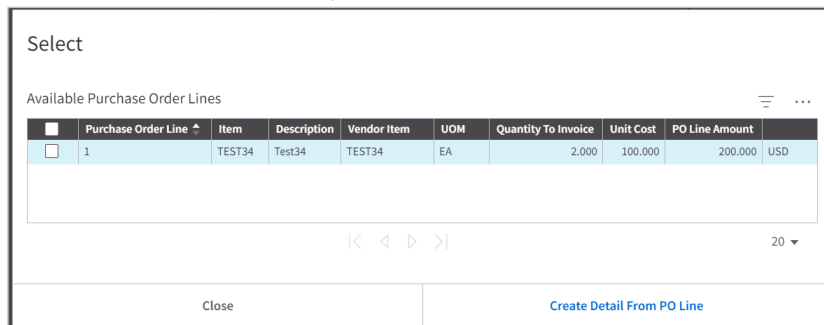
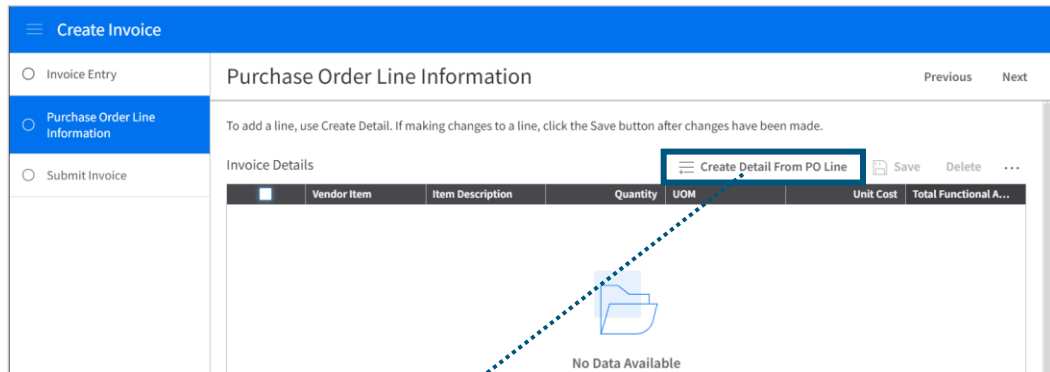
9. The **Purchase Order Line Information** tab displays

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

- e. If Purchase Order Line Information exists:
 - i. Confirm the Purchase Order Line Information is correct
 - ii. If you need to remove a line, select the line and click **delete**



- c. If the Purchase Order Line Information is empty:
 - i. Click **Create Details from PO Line** to select the lines you are invoicing.



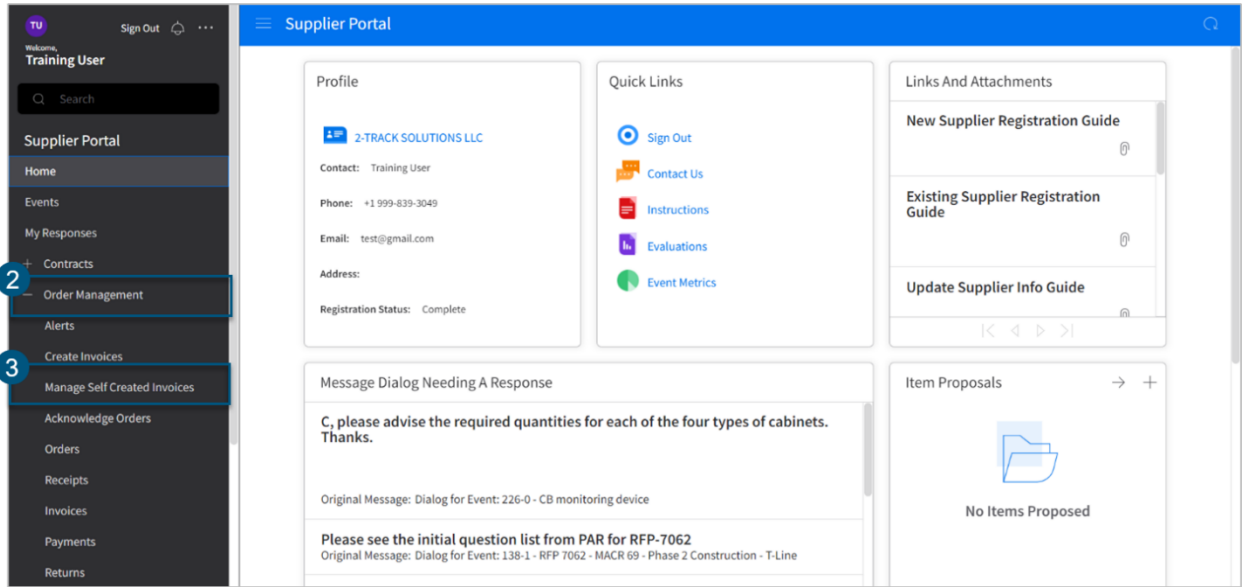
10. Click **Next** to view the **Submit Invoice** tab

11. Click Submit

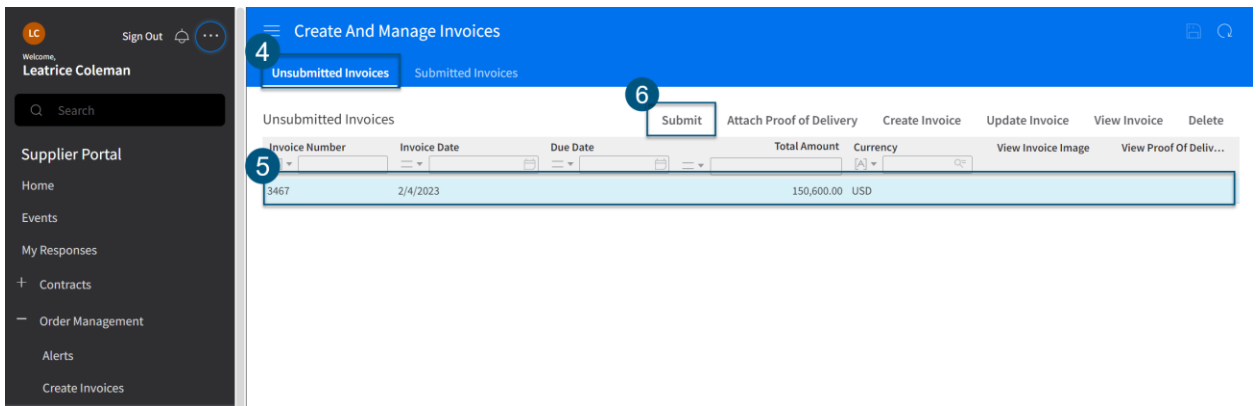
The screenshot displays a web application interface for creating an invoice. On the left is a dark sidebar with a search bar and a menu under 'Supplier Portal' including Home, Events, My Responses, Contracts, Order Management, Alerts, and 'Create Invoices' (which is expanded to show Manage Self Created Invoices, Acknowledge Orders, Orders, Receipts, Invoices, Payments, and Returns). The main content area is titled 'Create Invoice' and has a sub-header 'Submit Invoice' with 'Previous' and 'Next' navigation links. A left-hand navigation pane lists 'Invoice Entry', 'Purchase Order Line Information', and 'Submit Invoice' (the active step). The main content shows invoice details: Company 2041, Invoice Number CL2022-1234, and Invoice Amount 0.00. Below this, a text prompt says 'Click the Submit button to submit this Invoice immediately.' followed by a 'Submit' button highlighted with a red box. Further down, it says 'Click the link below to view the invoice' with a 'View Invoice' link, and a note: 'The invoice can also be viewed any time in manage self created invoices'.

Submit an Unsubmitted Invoice

1. Enter the Username and Password and click the **Sign On** button. The **Supplier Portal** page displays.
2. Expand **Order Management**
3. Select **Manage Self-Created Invoices**



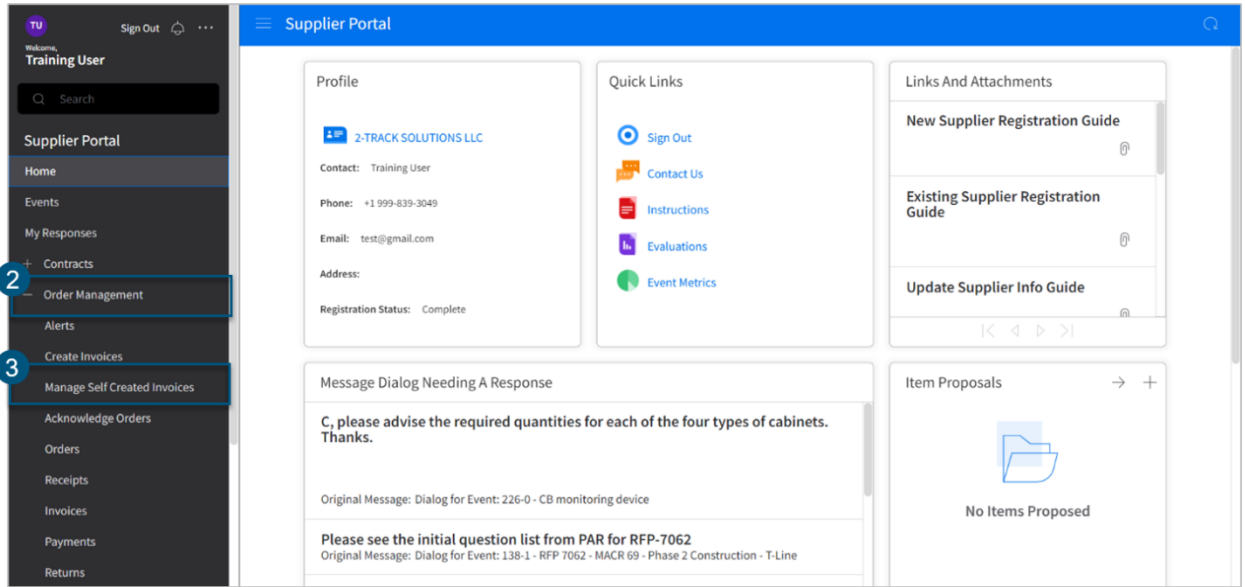
4. select **Unsubmitted Invoices**
5. Select an **Invoice**
6. Select **Submit**



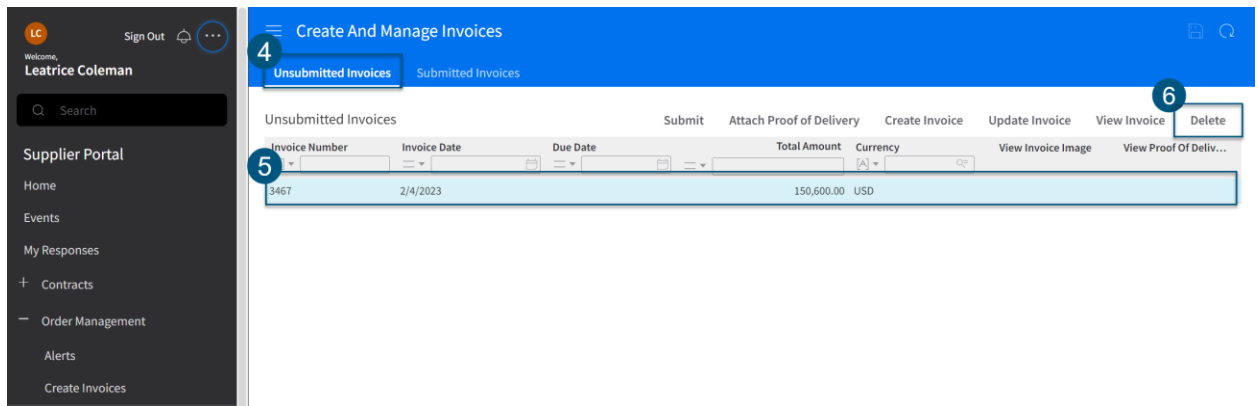
The invoice has now been submitted to PPL. To view the submitted invoice, navigate to the Submitted Invoices tab.

Delete an Unsubmitted Invoice

1. Enter the Username and Password and click the **Sign On** button. The **Supplier Portal** page displays.
2. Expand **Order Management**
3. Select **Manage Self-Created Invoices**



4. select **Unsubmitted Invoices**
5. Select an **Invoice**
6. Select **Delete**



The invoice has now been deleted. To recreate the invoice, view [Create an Invoice Job Aid](#).