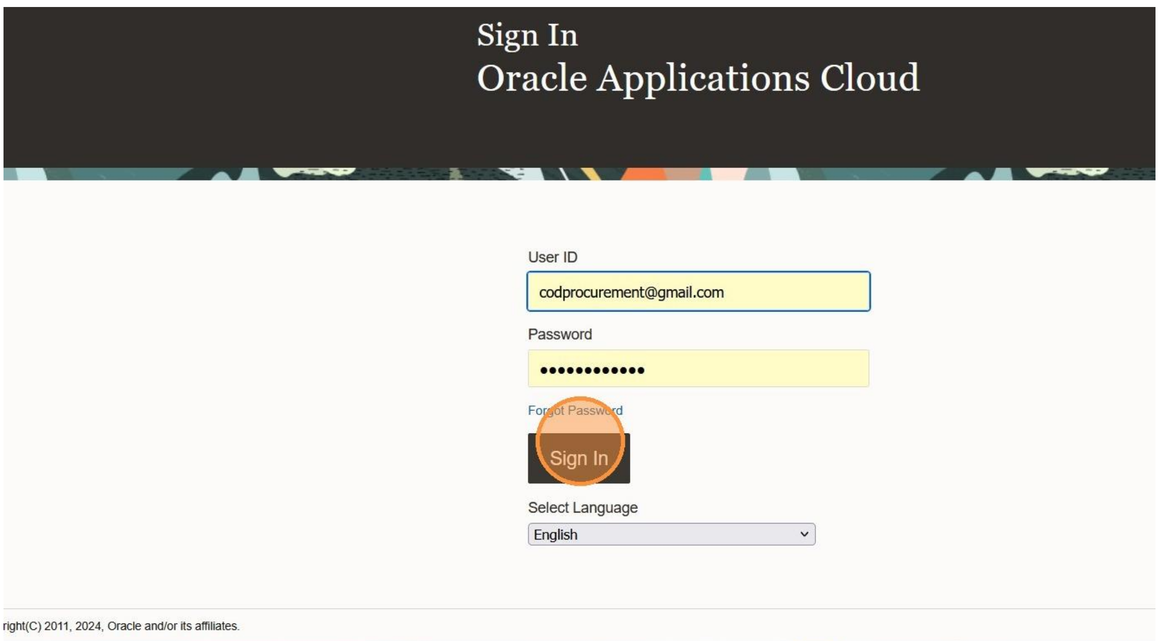
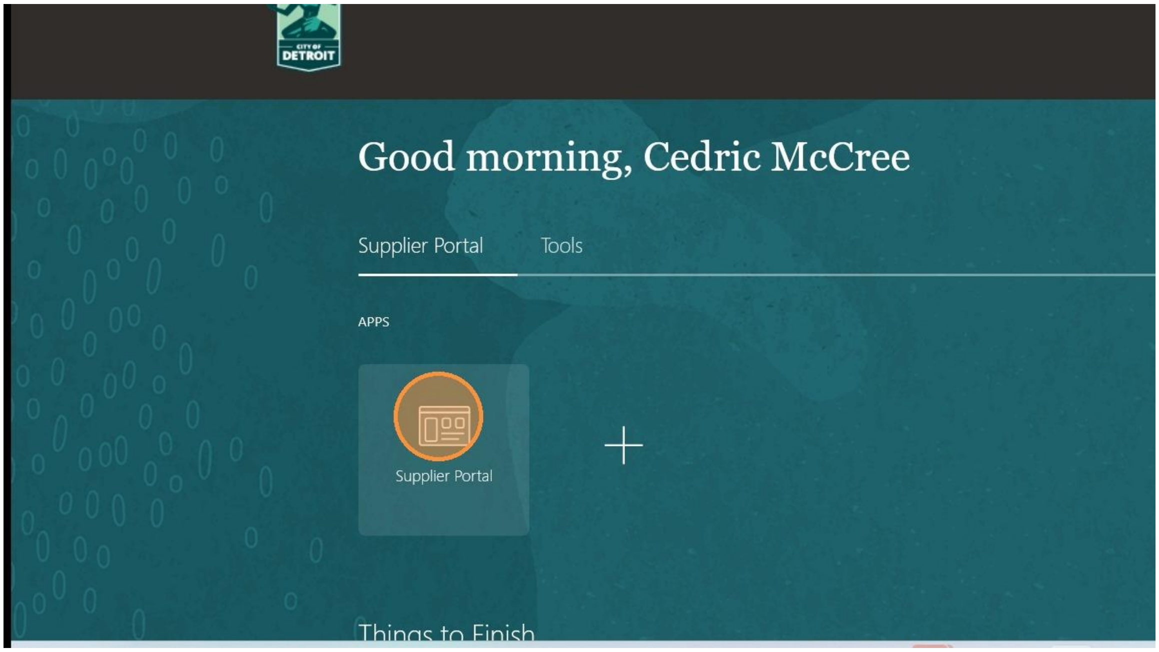
How to Create an Invoice in the Supplier Portal

This guide provides a step-by-step process for creating an invoice in the Supplier Portal, making it easy for users to navigate the system efficiently. By following these clear instructions, users can ensure accurate invoicing, streamline their workflow, and minimize errors. Whether you're new to the portal or need a refresher, this guide is an essential resource for managing supplier transactions effectively.

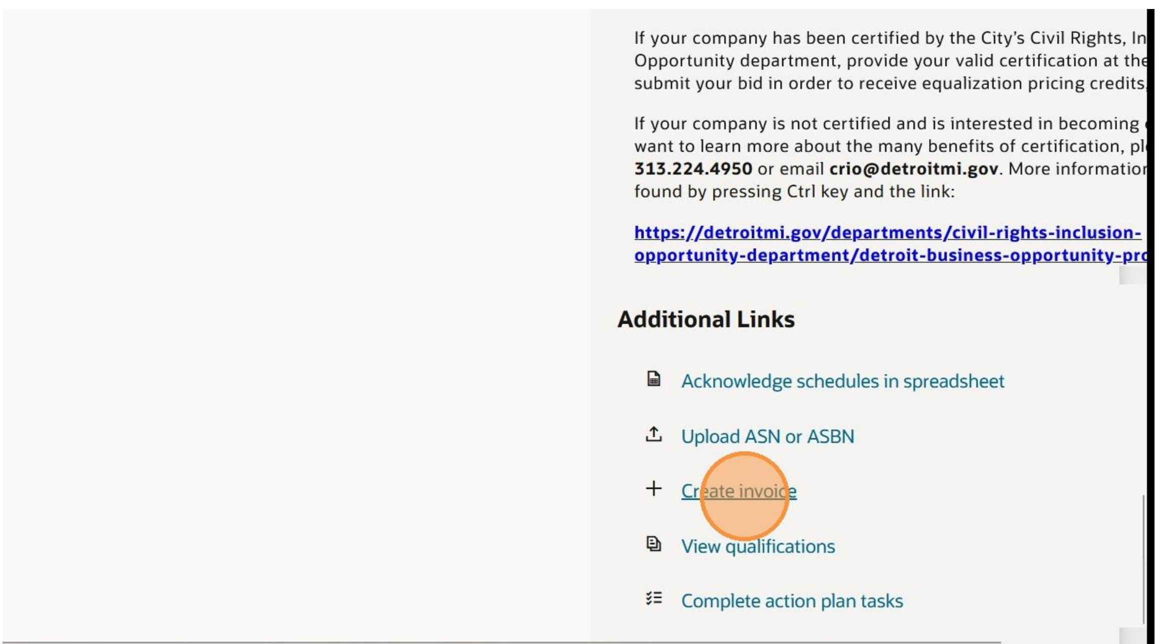
1. Enter your User ID (Email Address) and password. Click "Sign In"



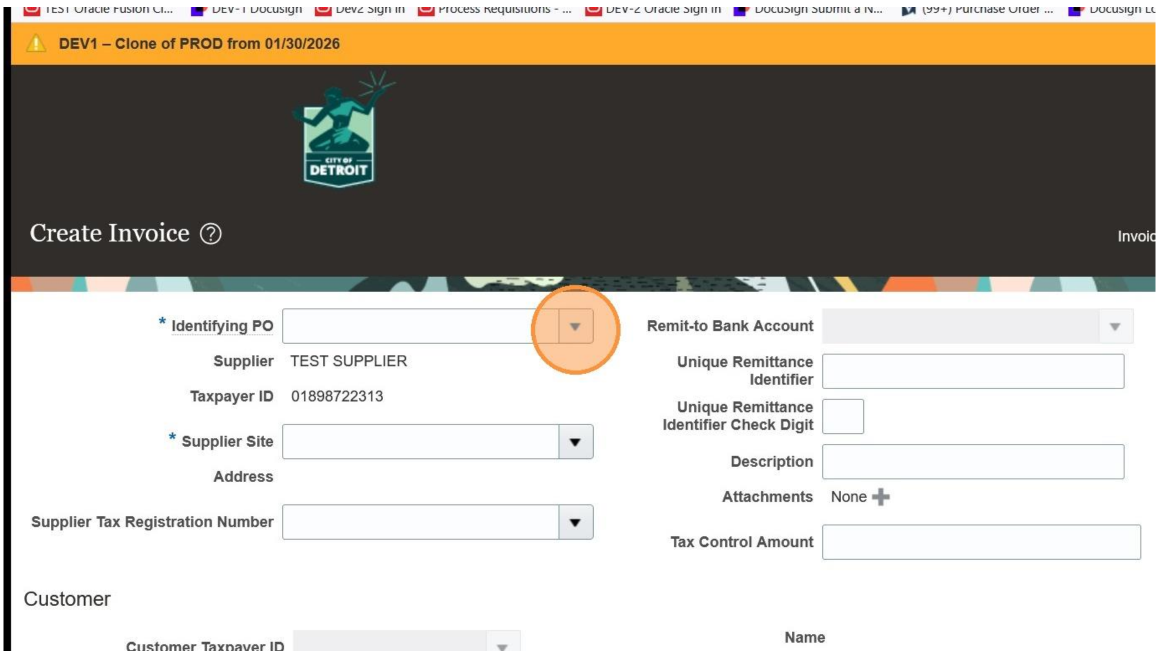
2. Click "Supplier Portal"



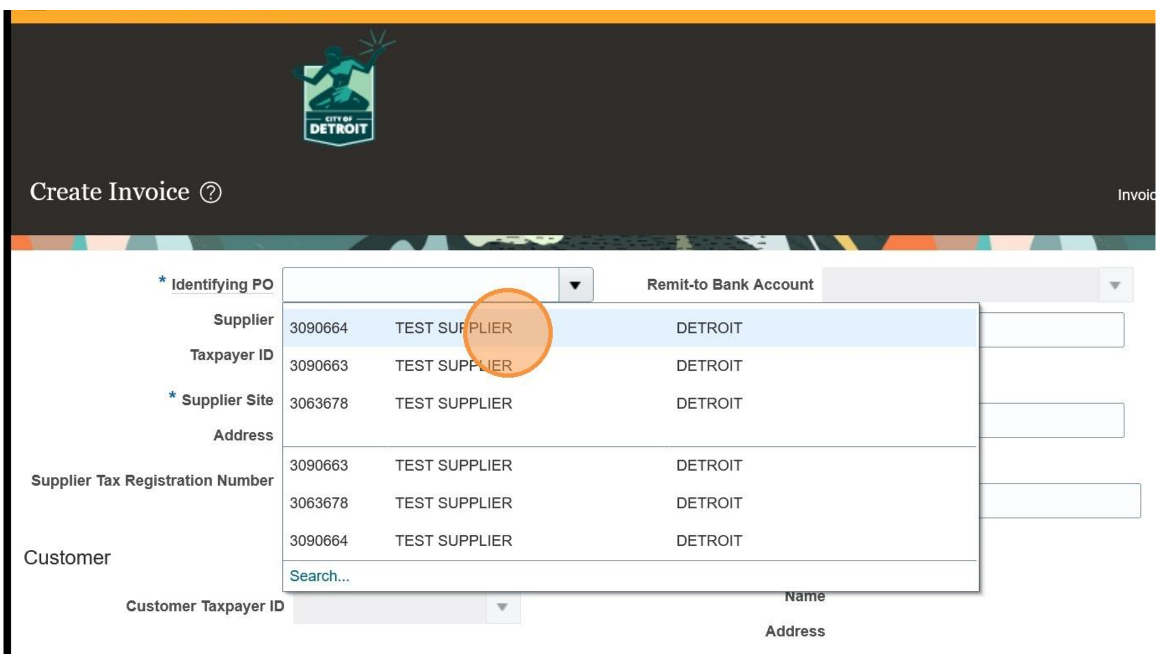
3. Under Additional Links, Click "Create invoice"



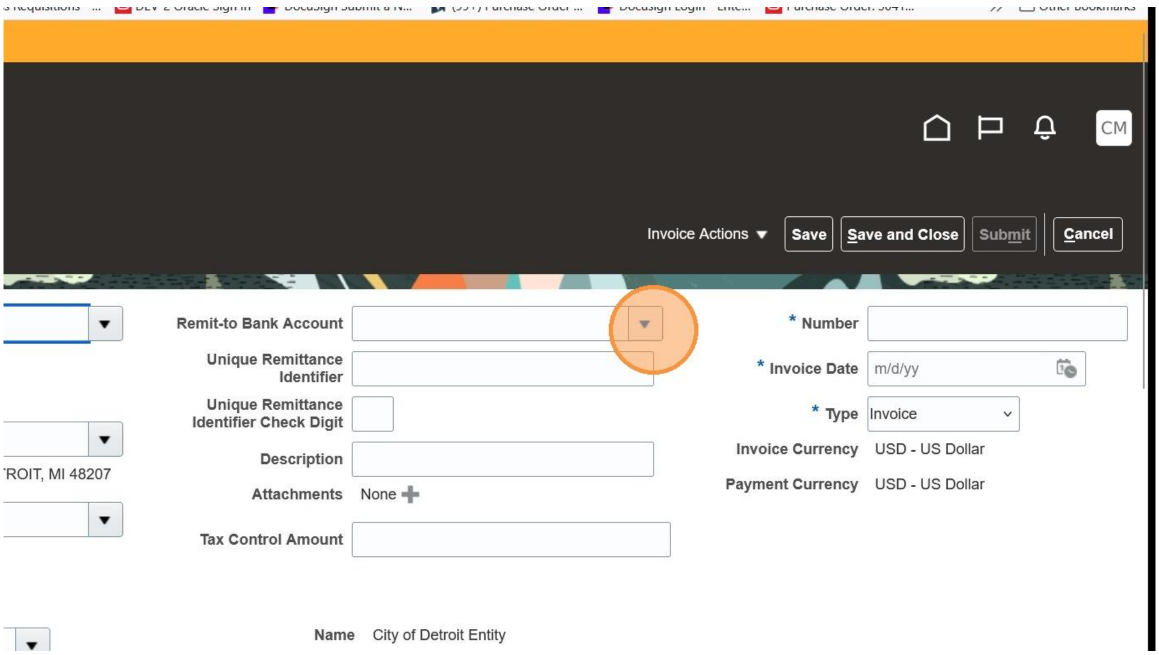
4. Click "Search: Identifying PO"



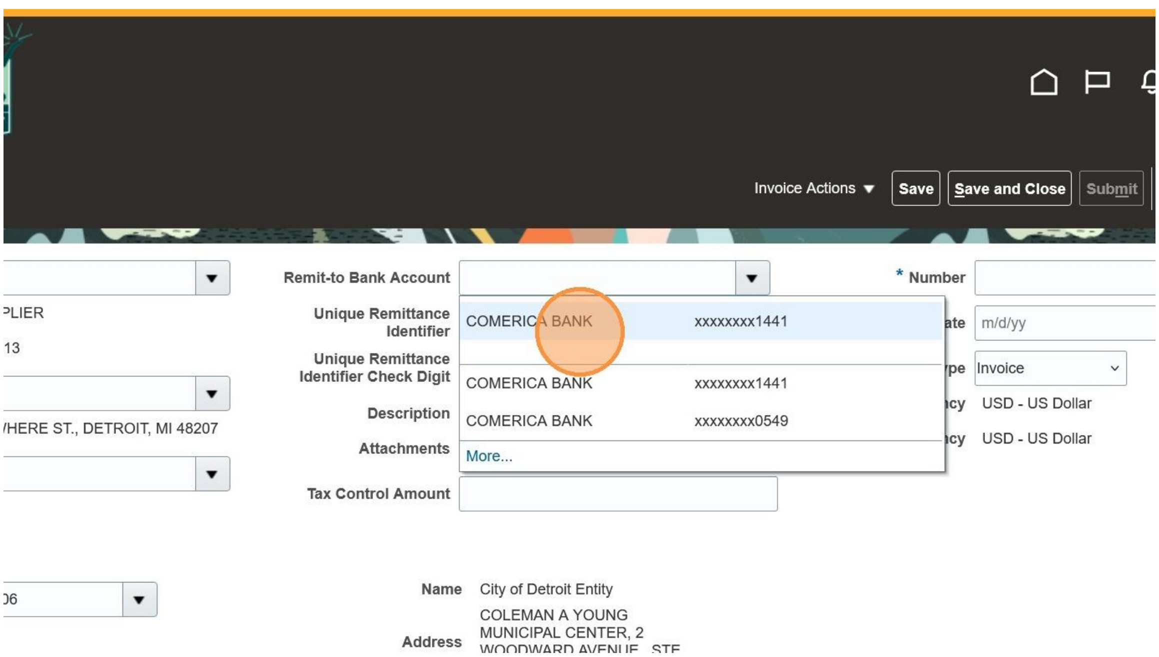
5. Select the PO number you will be invoicing against. The values in the left column will self populate.



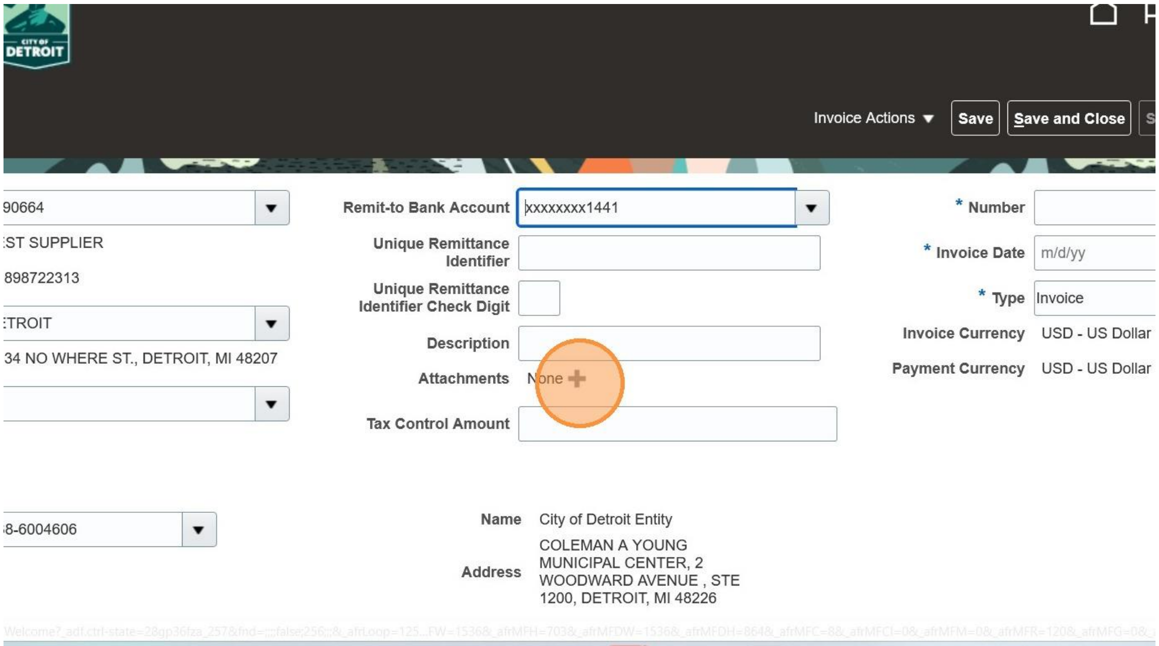
6. In the middle column, click "Remit-to Bank Account"



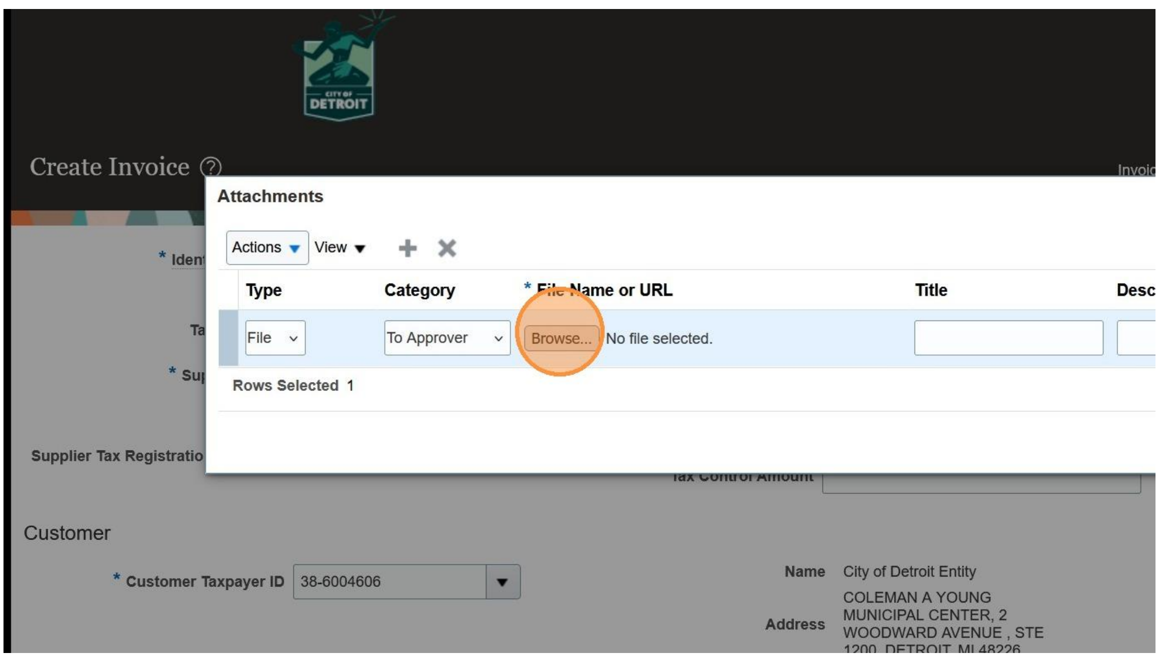
7. Select your bank account. If the field has no data, you must add your banking in the Company Profile section.



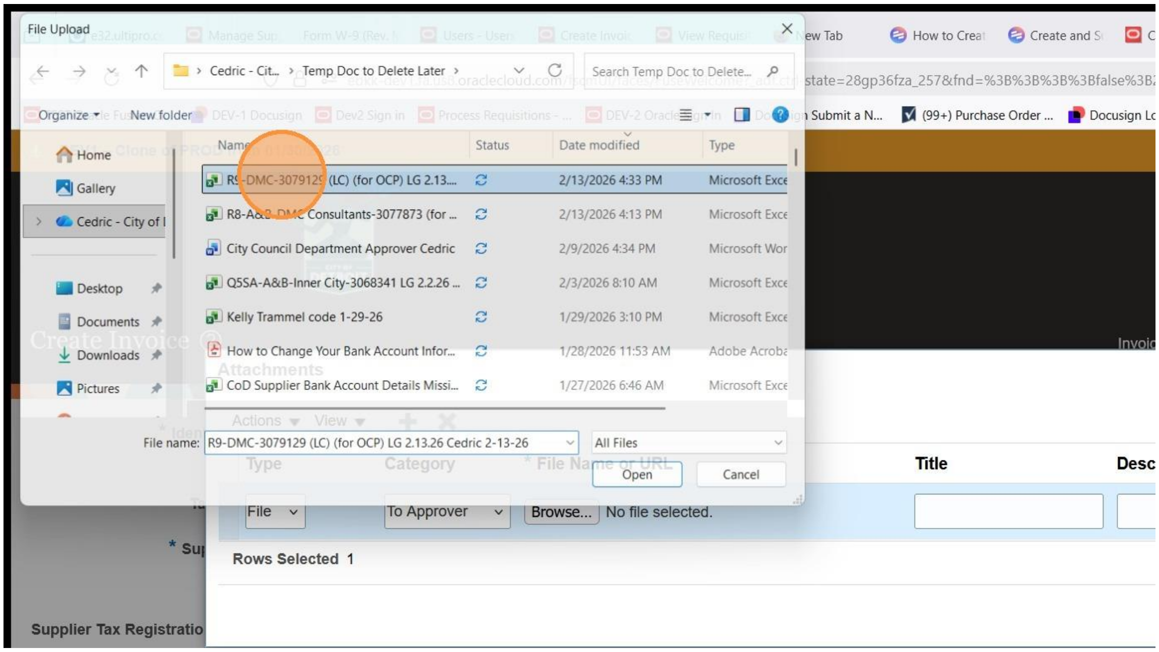
8. Add an copy of the invoice by clicking the '+' in the Attachments field."



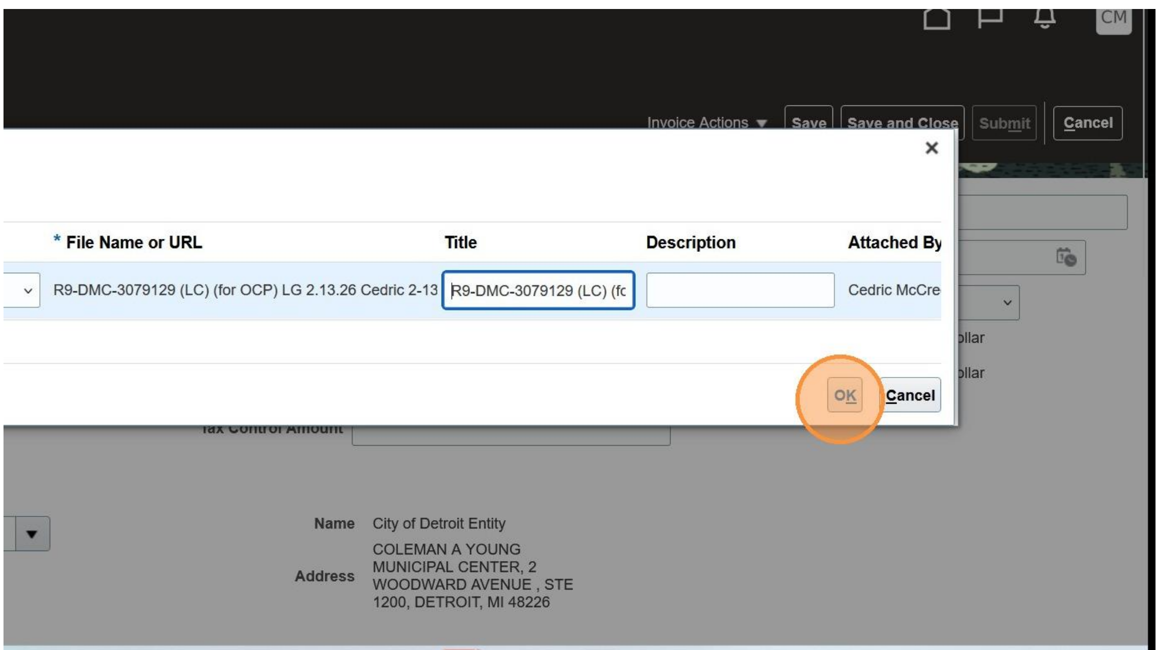
9. Click "Browse" and Select the invoice file you want to attach.



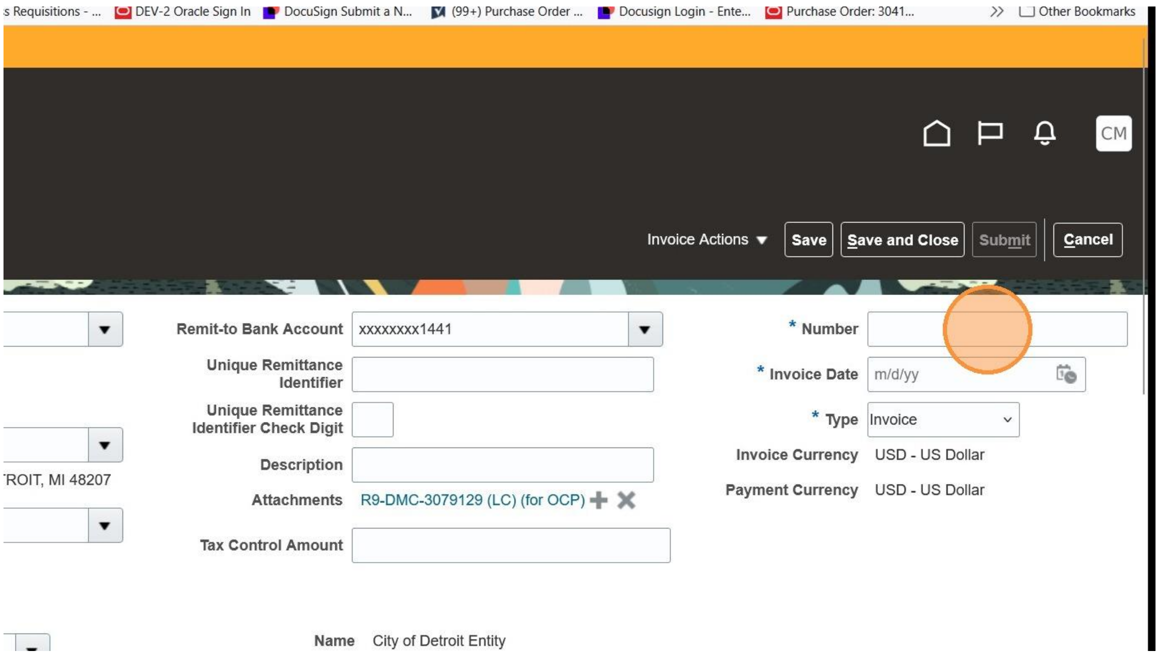
10. Double click on the desired file name and the upload process will begin.



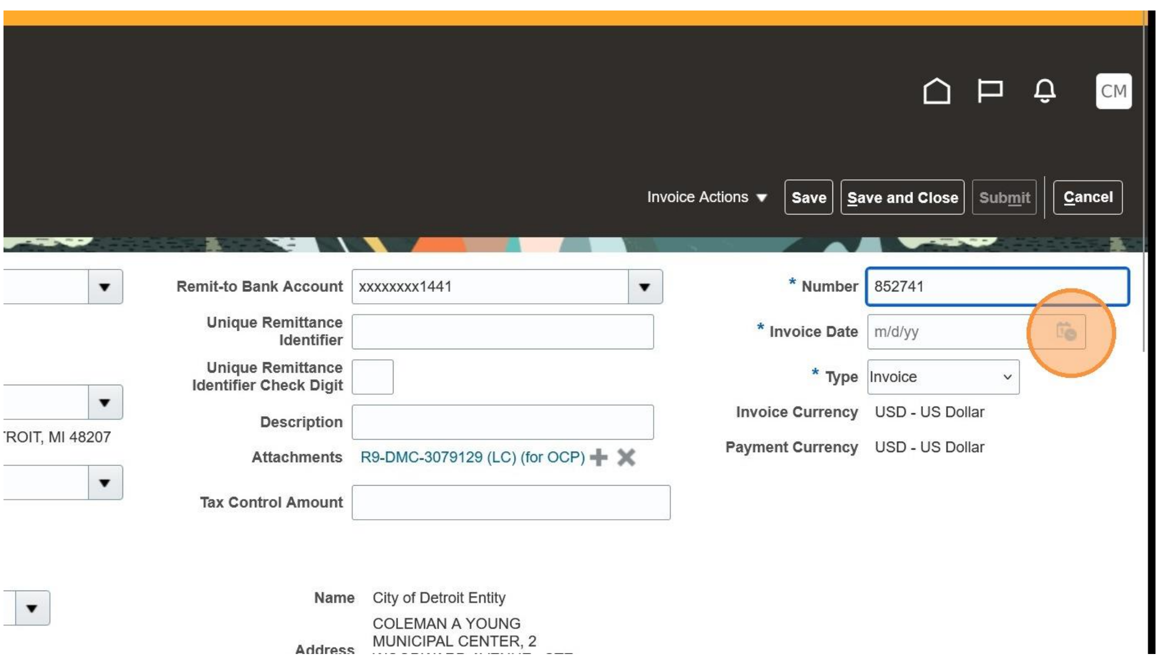
11. When the Title fills in, click "OK"



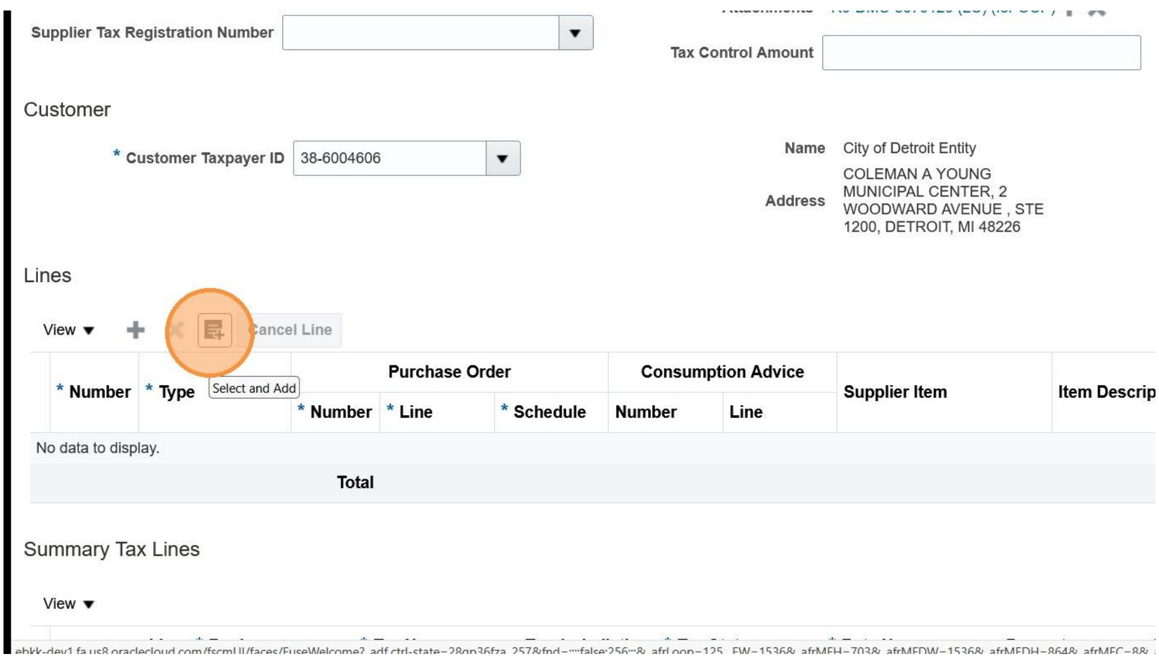
12. In the Right column, Click "Number" and enter the invoice number from the attached document. If you have a pre-authorized document, use the date indicated in that document.



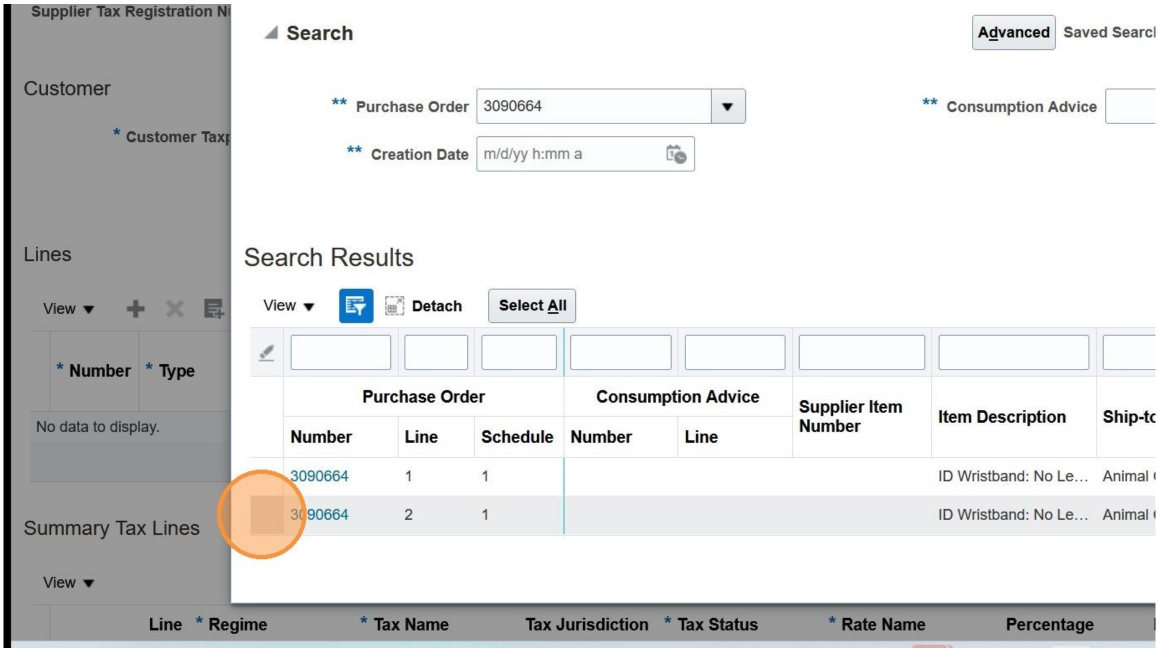
13. Using the date icon, select the date the goods or services were provided.



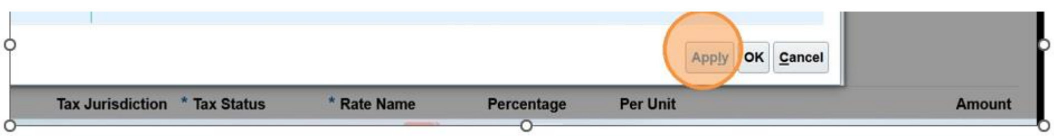
14. Scroll to the Lines section and click the "Select and Add" icon. This icon is a picture of a document with a '+' sign in the lower right corner.



15. Click the beginning of a line to highlight the line you want to invoice. If there are multiple lines, you can click the “Select All” tab to highlight all the lines.

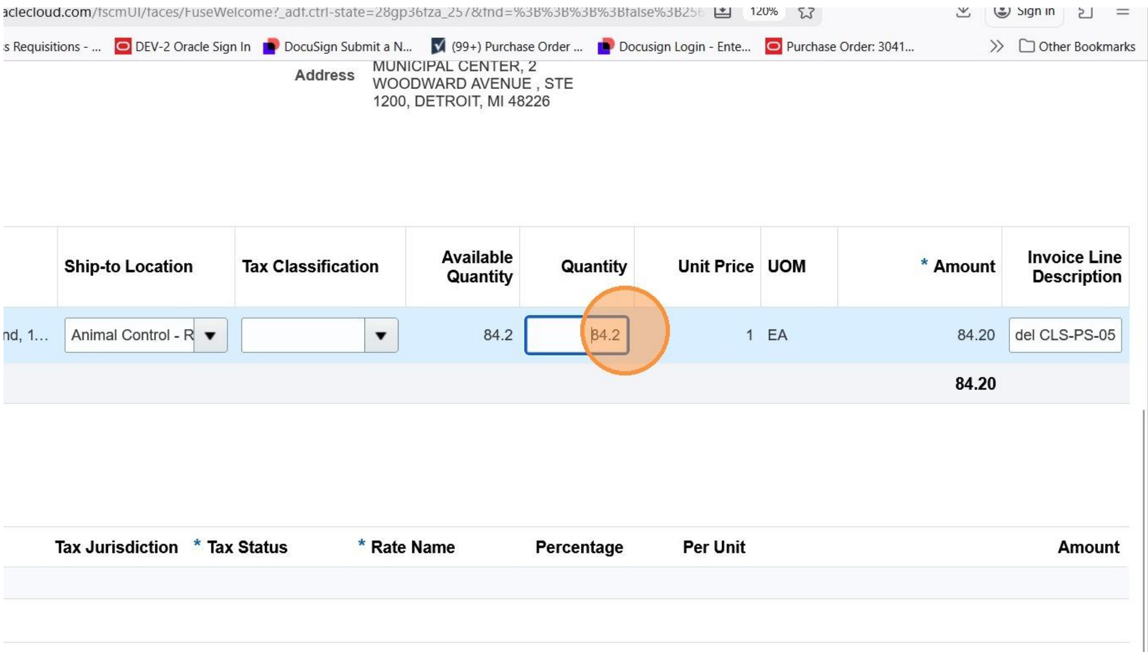


16. Click "Apply" on the lower right side of the screen, then click "OK". This makes the line(s) you selected editable.

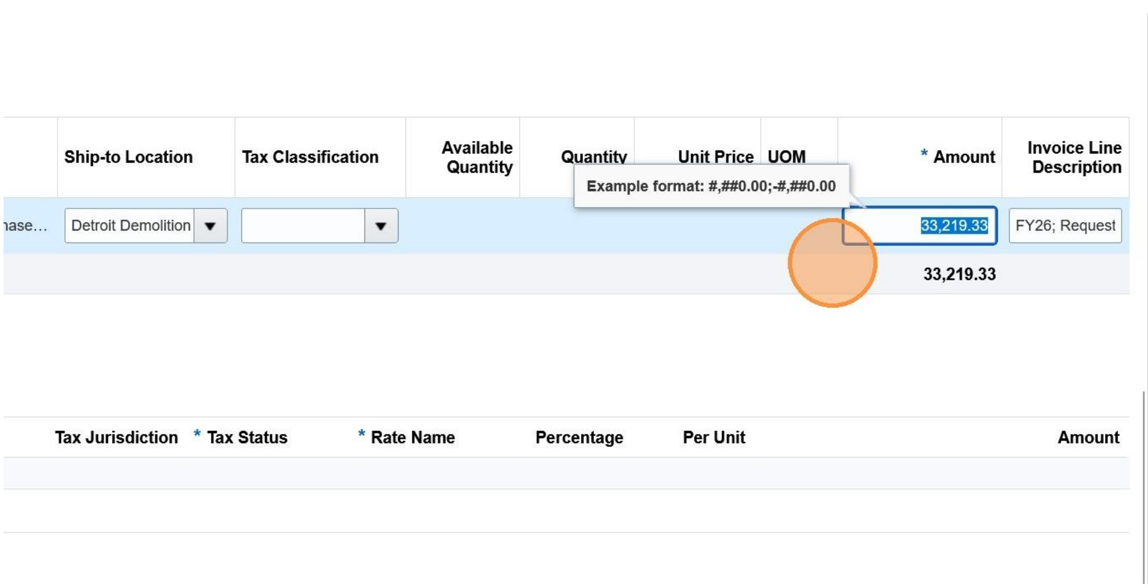


17. If there are multiple lines, follow these steps for each line.

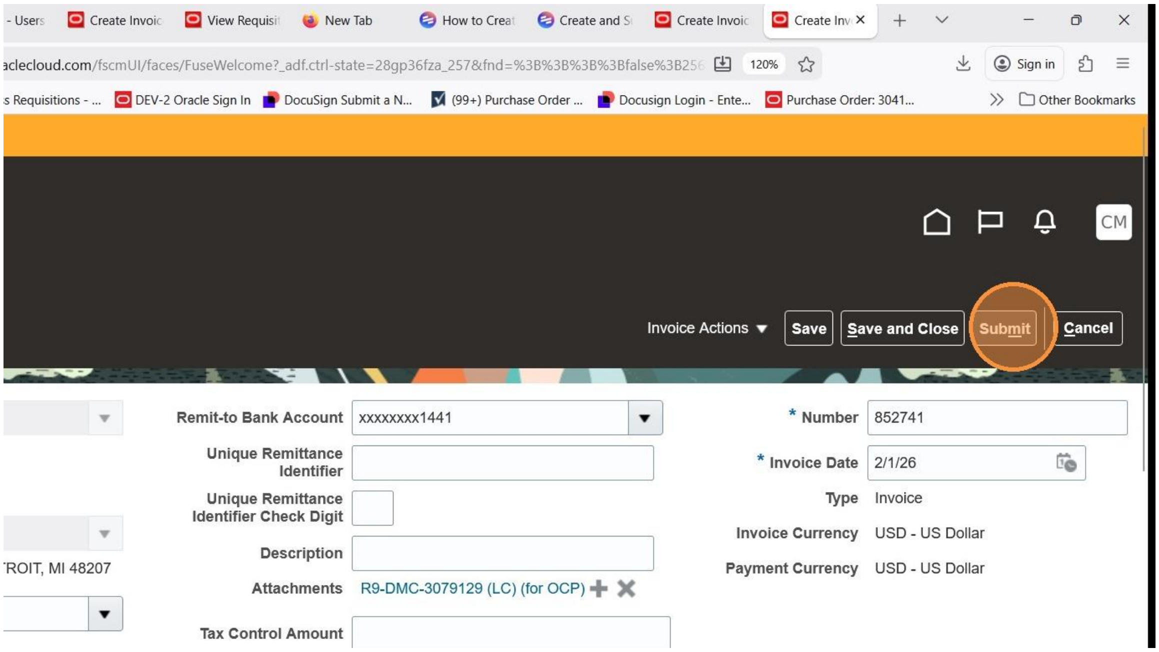
    a. If the invoice is for goods, scroll or tab over to the "Quantity" field. If the quantity is correct, no change is necessary. If you want to invoice for a different quantity, type over the quantity to show the quantity for this invoice.



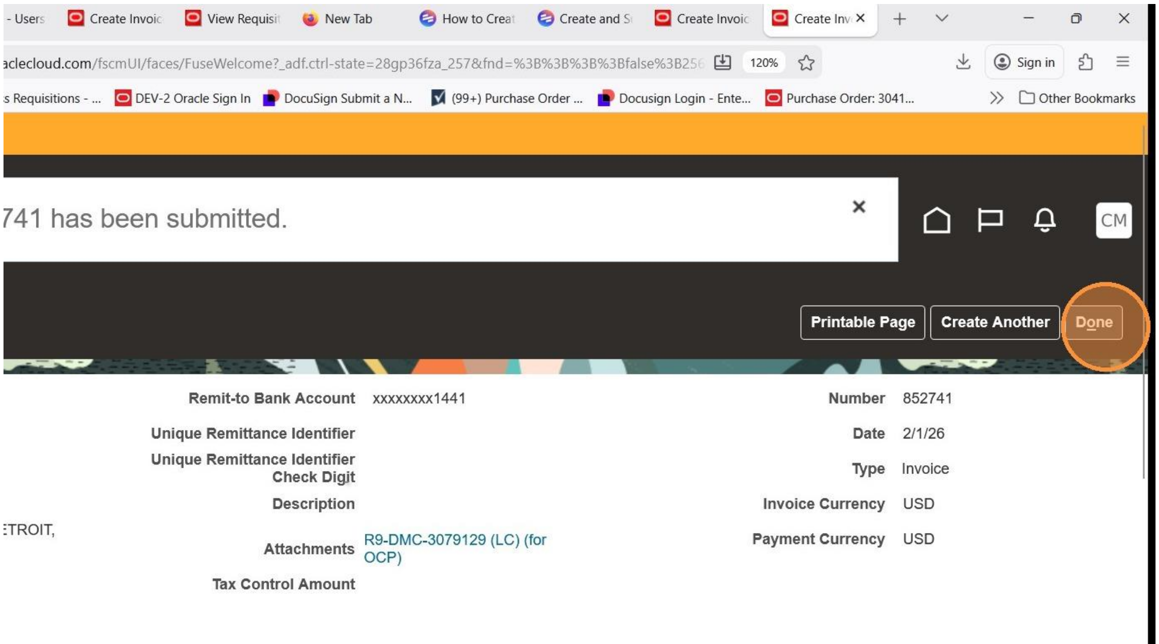
    b. If the invoice is for services, scroll or tab over to the "Amount" field. If the amount is correct, no change is necessary. If you want to invoice for a different amount, type over the amount to show the amount for this invoice.



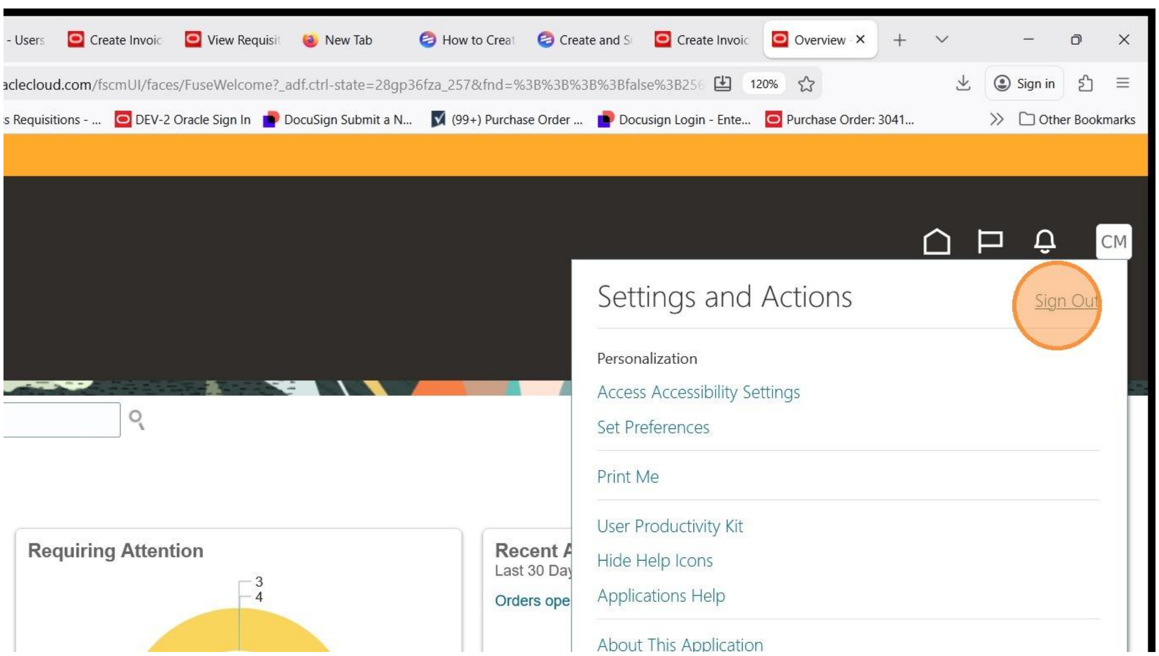
18. Scroll to the top of the page and click "Submit". You will receive a confirmation



19. If you want to create another invoice click "Create Another" and repeat the steps from the beginning. If you do not want to submit another invoice, select "Done".



20. Click your initials on the top right of the page and then select "Sign Out".



21. Click "Confirm"