## Quick Checklist: Once you are familiar with the steps, use this checklist as a reference.

You must complete all steps to correctly submit your invoice.

**View Purchase Orders (Optional –** can be used to check available POs**)**

1. Log in.
2. Click: **Materials >>Suppler Portal >> Dashboards/Actions >> Manager Supplier Actions**
3. In the **PO field**, **enter the issued PO number** (PO-10NNNN).
4. Click: **Find**
5. If necessary, to easily view the PO info., click the button: **Form**

**View Attachments**

1. After accessing the PO, click the button: **Attach**
2. In the area **Linked Content Files**, on the left, **click the row to highlight**
3. Scroll down, click: **View**
4. To view the attachment, open the file downloaded to your browser.

**Submit an Invoice**

1. Log in.
2. Navigate to **Materials >> Supplier Portal >> Dashboards/Actions >> Manage Invoices**
3. Hover over the field **PO** and **click the magnifying glass**, **highlight/select the PO.**
4. In the field, **Invoice Number**, enter your invoice information.
5. In the **Date** field, use the dropdown to **select the date of the Invoice**.
6. On the right, click: **Autoload**
7. At the bottom in the field **Inv Qty**, enter the **Hours value**.
8. Press: **Tab**

**Consultant – Enter Hours Worked – Note:** *This entry must be completed to match the invoice amount.*

1. On the screen **Invoice Lines**, in the lower right select: **Vendor Labor**
2. Click: **New**
3. In the upper left of the window, on the **Menu** bar, click the icon**: Save**
4. On the **Vendor Labor** screen, click: **Close**

**Upload and Attach an Invoice –** *You must do both upload and attach.*

1. On the top menu, click: **Process**
2. Click: **File Upload**
3. Select the file, enter a Description.
4. In the **Alternative File Location** field, click the **magnifying glass > SUPP-PROD-SP-AFL**
5. Click: **Upload**
6. To attach the invoice to the record: Click: **Attach**
7. On the **Linked Content Files** screen, click: **New**
8. Hover over the **Content File Name magnifying glass.**
9. Highlight/select the file you just uploaded and click: **Select**
10. Click: **Close**

**Submitting the Invoice**

1. In the **Supplier Approval** area, **click the checkbox: Approved**
2. Enter any desired **Notes** (optional).
3. In the most upper left of the screen click the button: **Save**
4. Log out of the system.