

# How to Create and Manage Invoices Against Purchase Orders

<p><b>Why might use this guide?</b></p>	<p>Suppliers wishing to create invoices against purchase orders in Oracle via the Oracle Supplier Portal.</p>
<p><b>Who might use this guide?</b></p>	<p>Suppliers can enter all invoice details such as Identifying Purchase Order, Invoice Number, Invoice Type, and Date through a single unified platform. Suppliers can also search for invoices using various criteria such as Invoice Number, Invoice Status, Paid Status etc. Invoices can also be cancelled /deleted if not submitted for payment.</p> <p>Note: some fields are Mandatory and are indicated by *</p>
<p><b>What related documents should I refer to?</b></p>	<ul style="list-style-type: none"> <li>How to Cancel an Unpaid or Incomplete Invoice</li> </ul>

## Overview

### What does the Create Invoice homepage look like?

**Definitions:**  
**Invoice Header** displays common information such as Supplier and supplier type, Tax Registration number (ABN), Invoice number, Invoice date and customer details.

## Overview

**Invoice Lines** shows details of goods and services including tax, freight and miscellaneous charges.

**Summary Tax Lines** shows tax (GST) Charges.

**Totals** shows total charges and costings on the invoice.

**Lines**

* Number	* Type	Purchase Order		Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Descr
		* Number	* Line	* Schedule	Number										
No data to display.															
Total															

**Summary Tax Lines**

Line	Regime	Tax Name	Tax Jurisdiction	Tax Status	Rate Name	Percentage	Per Unit	Amount
No data to display.								

**Totals**

Items	Freight	Miscellaneous	Inclusive Tax	Exclusive Tax	Retainage	Invoice Amount
				0.00		0.00
						Due

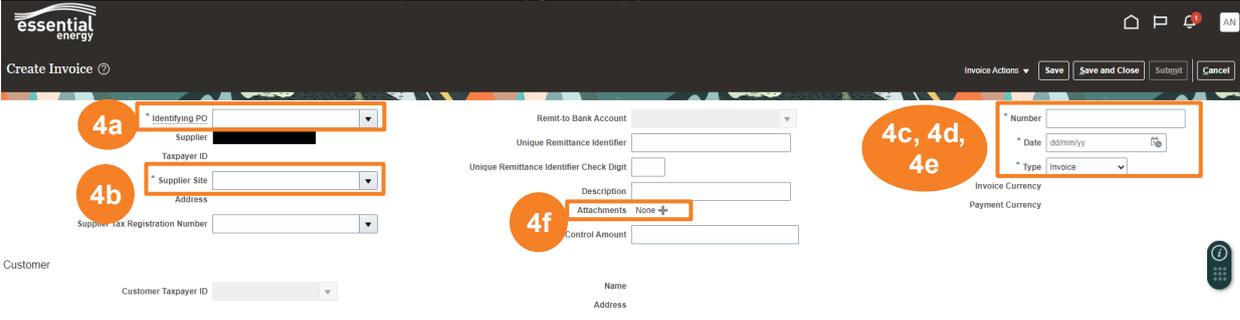
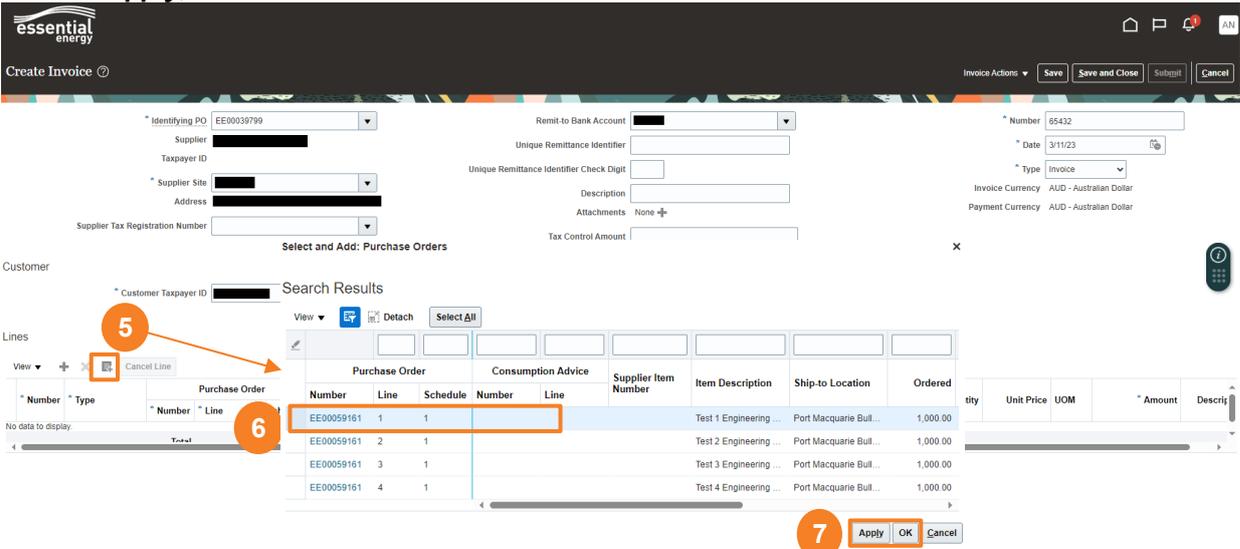
**Invoice Actions/Calculate Tax** calculates relevant GST charges on an invoice.

**Invoice Actions/Cancel or Delete Invoice** allows an unsaved and unsubmitted invoice to be cancelled. Search for the invoice number via View Invoices, highlight the invoice number to access the Invoice Actions field. An invoice that has been matched to a purchase order is unable to be deleted but can be cancelled.

**Note:** If an invoice has been saved as incomplete and is required to be paid, please ensure that you review and click **Submit** to complete the process.

## System Steps of Creating an Invoice

Step	Action
1	Login to the system.
2	Navigate to the <b>Supplier Portal</b> tab. Click on the <b>Supplier Portal</b> app.
	<p>The screenshot shows the 'Accounts NA' dashboard. At the top, there is a navigation bar with tabs: 'Me', 'My Team', 'Supplier Portal', 'Procurement', 'Tools', and 'Others'. The 'Supplier Portal' tab is highlighted with an orange box and a circled '1'. Below the navigation bar, there is a section titled 'APPS' with a circled '2'. Under 'APPS', there is a 'Supplier Portal' app icon, also highlighted with an orange box.</p>
3	From the Supplier Portal homepage, scroll down the <b>Task</b> list and select <b>Create Invoice</b> .
	<p>The screenshot shows the 'Supplier Portal' homepage. At the top, there is a search bar and a navigation menu. Below the search bar, there is a 'Tasks' section with a list of tasks. The 'Create Invoice' task is highlighted with an orange box and a circled '3'. Other tasks in the list include 'Manage Orders', 'Manage Schedules', 'Acknowledge Schedules in Spreadsheet', 'Manage Agreements', 'Manage Programs', 'Manage Shipments', 'Create ASN', 'Create ASBN', 'Upload ASN or ASBN', 'View Receipts', 'View Returns', 'Manage Contracts', 'Manage Deliverables', 'Review Consumption Advises', 'View Invoices', and 'View Payments'.</p>

Step	Action
4	<p>The Invoice Header must be completed before moving onto Invoice Lines. Enter the relevant and mandatory (*) fields:</p> <p><b>4a:</b> Identifying PO number.  <b>4b:</b> Supplier Site  <b>4c:</b> Supplier Invoice Number  <b>4d:</b> Date of Invoice  <b>4e:</b> Type (Invoice)  <b>4f:</b> Use the Attachments field to upload a copy of Supplier Invoice or other attachments.</p> 
5 6 7	<p>Scroll down to the heading 'Lines', click on the <b>Select and Add</b> icon.</p> <p>Select the purchase order, highlight the purchase order <b>Lines</b> covered by the invoice.</p> <p>Click on <b>Apply</b>, then <b>Ok</b>.</p> 
	<p><b>Note:</b> The query by example (Blue Box) allows for filtering where there are multiple purchase orders and/or lines. To remove, click the box again.</p>
8	<p>Review the <b>Quantity</b> to be shipped and adjust if applicable. Partial deliveries may be invoiced separately</p>
9	<p>If the items or services are GST applicable, go to <b>Invoice Actions</b> and select <b>Calculate Tax</b>.</p> <p>This option also allows for invoices to be cancelled and deleted (refer to Definitions on page 2 of this guide)</p> <p>At the end of step 9, an invoice can be submitted via the Submit button (step 9A) where the invoice may have been attached from an external Supplier system.</p> <p>If using the Oracle system for invoicing and additional costs are required please proceed to step 10 and beyond.</p>

Step	Action
10 11	<p>Enter Shipping and Handling charges using the <b>+ Symbol</b>            Select the <b>Charge Type</b>  <b>11a: Enter an Amount and Description</b></p>
12	<p>Scroll back up the page and click on <b>Submit</b></p>
13	<p>A banner will pop up advising <b>'Tax was calculated. Review the tax lines, make necessary changes, and calculate tax again.'</b></p> <p>Review tax lines to ensure all is correct. If no changes are required, click <b>Submit</b>. A banner will pop up advising <b>'Invoice XXXXX has been submitted.'</b></p>

Step	Action
	
<p>Should you require further assistance please email <a href="mailto:suppliers@essentialenergy.com.au">suppliers@essentialenergy.com.au</a></p>	