School District of Philadelphia Supplier Portal Create an Invoice

Guidelines

Creating an Invoice is an integral part to working within the ERP Supplier Portal. Creating Invoices allows for payments from SDP to be directed to you as a Supplier and allows you to bill for work that is done and items provided. **NOTE: Prior to using the supplier portal to upload invoices, you should verify with your direct contact at the District whether approval by their office is necessary prior to submitting.**

Navigation

1. While on the Springboard, click the ***Supplier Portal*** **icon**.
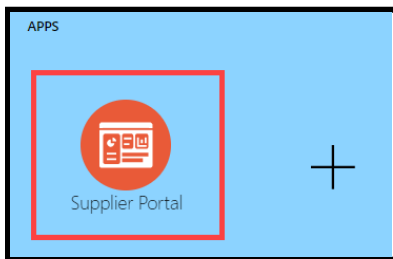
2. When the Supplier Portal has loaded, click on the ***Create Invoice*** **link** in the Tasks Pane on the left hand side of the screen.
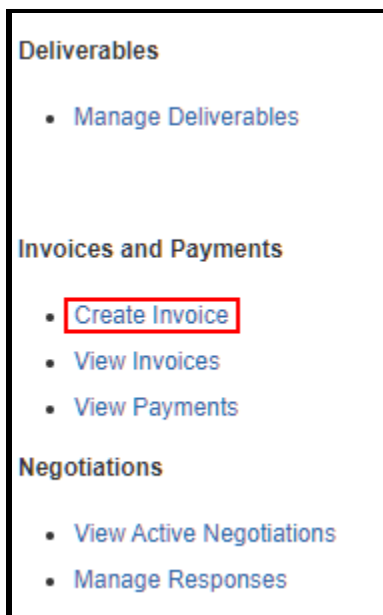
3. The Create Invoice Page will load. From here you can enter the following relevant information to create your Invoice within the ERP.

Identifying PO - The Purchase Order for which you'd like to create an invoice. If it is not displaying, reach out to your District contact for more information.

Supplier Site Address -- This is the address where your check will be sent. If it is incorrect, do NOT submit an invoice. Instead, you should update the address in your portal first. For assistance, contact oraclesupplier@philasd.org.

Number - The unique invoice number from your invoice. The system sometimes rejects invoice numbers in error. If the system rejects your invoice number, please add a distinct letter at the end such as "a" to push your invoice through.

Date - This should match the date on your invoice, and will likely be the items were shipped or the work performed. Note that the system is scheduled to pay 30 days from this date, unless more than 30 days have already passed, in which case the system pays immediately.

4. When you have filled all the relevant information requested, you **MUST** attach a copy of the invoice via the *Attachments* **Button**. Click the ➕ icon to open the Attachments Pop-up.

5. When it is open do the following, click on the button that says "Choose File" and select the file from your **computer**. You do not need to update any other fields. Then click **OK**.
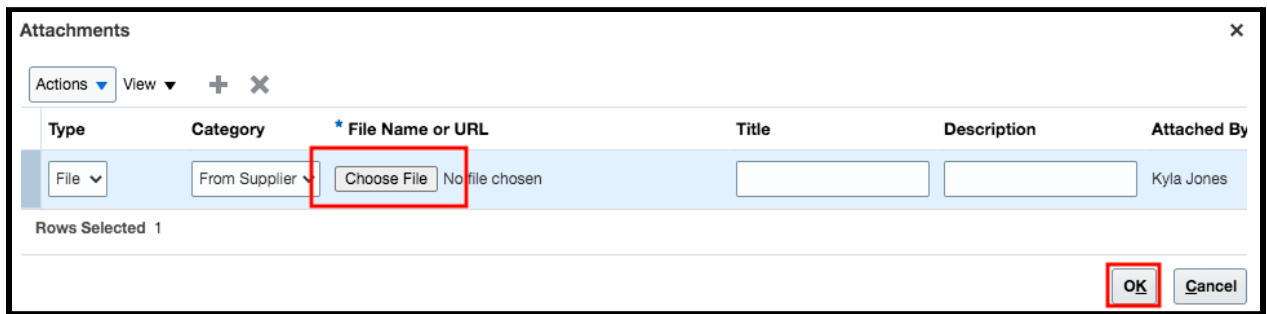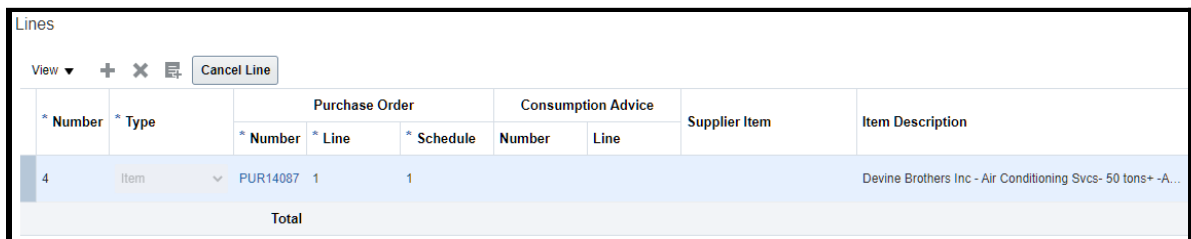

6. Next, in the next section, under the work Lines, find and click this icon

7. A screen will appear allowing you to select your purchase order. you can search and apply for the Lines that should be added to your invoice.
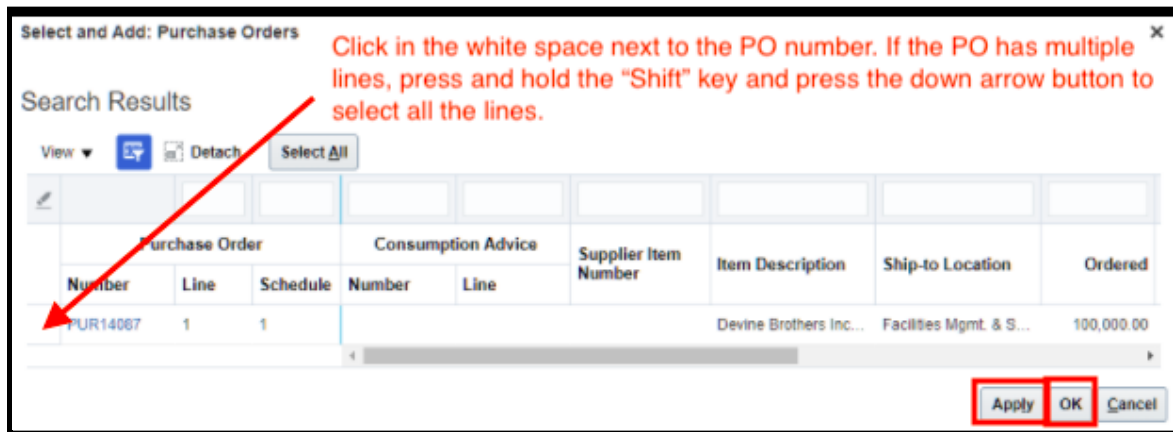
8. The Line(s) now appears in the Lines section of the Invoice.

9. If you are invoicing against a blanket PO, **you may need to adjust the dollar amount reflected here to indicate ONLY the amount you are billing for on this particular invoice.**

ailable uantity	Quantity	Unit Price	UOM	* Amount
				75,434.41
				75,434.41

10. If you have brought in a line that you have not fulfilled and are not billing against, you should delete it rather than submit it with a 0 amount. To delete a line, highlight it and click the *Delete* button.

Lines

View ▼ ✚ ✖ ☰₊ Cancel Line

****IMPORTANT****

Do NOT add lines using the "+" option. This will result in NON-PAYMENT.
(If the PO is incorrect, it MUST be adjusted prior to uploading the invoice. Reach out to the buyer or the requester listed on the PO to initiate those changes.)

Lines

View ▼ ✖ ✖ ☰₊ Cancel Line

11. When you are finished editing your lines, click the *Save* button in the upper righthand corner then click the *Submit* button. A confirmation message will appear.

Save   Save and Close   Submit   Cancel