

Table of Contents

Introduction	2
Prerequisites	2
Invoice Upload	3
Search for an uploaded invoice	7



Introduction

CPS is testing a feature that allows suppliers to submit their invoice against a specific PO online through the CPS Supplier Portal. If your organization has access to this feature, then your "Billing Administrator" users and "Business Administrator" users will be able to use the "Upload Invoice" feature. This feature can also be used to upload Credit Memos in case any adjustments need to be made.

After you submit an invoice through, you cannot change that invoice. If you need to make adjustments to a submitted invoice, you can create a credit memo against the same purchase order or contact the CPS department which requested that Purchase Order.

Once the invoice is submitted, CPS requesting department will review the invoice and either approve or reject it based on the supporting document and other available information provided. Until the review is complete, the invoice will be kept on "Payment Approval" Hold. If the invoice is approved, the Invoice Hold will be released. If the invoice is rejected, you will be notified about the cancellation of the invoice and the reason for rejection.

Prerequisites

• The user should have an account for the portal with "Billing Administrator" or "Business Administrator" access.

Navigation

CPS Supplier Portal (Supplier Access) \rightarrow Home Page \rightarrow Accounts (Tab) \rightarrow Upload Invoice (Sub-tab)



Invoice Upload

Upon clicking on the 'Go' button below the 'Invoice Status' field, the **Upload Invoices** page displays all invoices uploaded earlier through the Supplier Portal, if any exist.

To proceed with uploading a new invoice against a PO, follow the below steps.

Step	Action
1.	Click the Go button next to 'Create Invoice' field.

You should see the screen below.

Home Orders Shipm	ISupplier Portal	T	Contraction of the local division of the loc	n Navigator 🔻	📴 Favorites 🔫	Home Logout Preferences Help
	Involces View Payments					
Invoice Actions						
						Create Invoice With a PO 🗸 Go
Search						
Note that the search is case Supplier X Invoice Number Invoice Date From Invoice Status	YZ Corp		Purchase Order Number Invoice Amount Invoice Date To Currency			
Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount Purchase Order	Status Withdraw	Cancel	Update View Attachments
No results found.						
						Create Invoice With a PO V Go
Privacy Statement			Home Orders Shipments Accounts Admin Home Logout Preference	rs Help		Copyright (c) 2006, Oracle. All rights reserved.

Step	Action
2.	Type in the Purchase Order Number, and click the Go button.

ORACLE [®] iSupplier Portal						1	Navigat	or 🔻 🖻 Fa	worites 🔻		Home L	ogout Preferences	Help
Home Orders Shipments Accounts Admin View Invoices Upload Invoices View Payments													
Purchase Orders		O		Manag							Review and Subm	it	
Create Invoice: Purchase Orders												Cancel Step	1 of 4 Next
Search													
Note that the search is case insensitive Purchase Order Number Purchase Order Date Buyer Organization OFS Busine	an-2021) ss Group Go Clear	er the PO number her											iced Search
Select PO Number Line Shipment No search conducted.	Advances or Financing	Item Description	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization	Packing Slip	Waybill
Privacy Statement		Home Ord	ers Shipments Accounts Admin	Home Logout	Preferences	Help						Cance Step	



Step	Action
3.	Type in the Purchase Order Number, and click the Go button so that system lists down the PO.
4.	Select the Purchase Order by checking the check box and click on the 'Next' button to land on the 'Create Invoice – Details' page.

ORACLE ISupplier Portal Home Orders Shipments Accounts Admin			🉃 Navigator 👻 📑 Favorites	Home Lagout Preferences Help
View Invoices Upload Invoices View Payments				
Purchase Orders				Review and Submit
Purchase Orders Create Invoice: Purchase Orders	Details	Manage Tax		Review and Submit
				Cancel Step 1 of 4 Negt
Search				
Note that the search is case insensitive Purchase Order Number Purchase Order Date (cample 29-Jan-201) Boyer Organization OFS Business Group Go Clear				Advanced Search
Select Items: Add to Invoice				
Select All Select None			lease la la late a	
Select PO Number Line Shipment Advances or Financing 3746058 1 1	Item Description Supplier Item Number Consultant Consultant		UOM Unit Price Curr Ship Te Each 160 USD Procure	
3746058 1 1	Consultant Consultant	20 0 0	Each 160 USD Procure	ment CPS Business Group
Privacy Statement	Home Orders Shipments Accounts	s Admin Home Logout Preferences Help	,	Click on the 'Next'

Step	Action
Step 5.	 Action The following fields must be entered in 'Create Invoice: Details' page, and the fields with an asterisk are mandatory: Remit To* - Choose your Organization Payment Address. Remit To Bank Account - Choose the bank account if you are receiving payments through ACH. Skip this field if you receive payments through checks. Invoice Number* - Enter your Invoice number as an alphanumeric uppercase value. Invoice Date* - Enter Invoice Date as the current or a past date. Invoice Type* - Select the type as 'Invoice' for payment or 'Credit memo' for adjusting an already paid Invoice.
	 Invoice Description* – Enter a description for your invoice. Add* – Click on Add button to attach PDF copy of your invoice file and other necessary supporting documents in PDF format (timesheets in case IT consulting services). You will receive a confirmation message saying "Attachment <title> has been added successfully but not committed; it would be committed when you commit the rest of the current transaction." upon successful file attachment. </th></tr></tbody></table></title>



	 Quantity* – Enter the quantity of units that you are billing for.
6.	Click on the 'Next' button.

ORAC	LE.	iSupplier P	ortal								Favorites	Hame	Logout Prefere	
Harry Oalary	chi									lavigator	Favorites V	Home	Logout Pretere	ences
Home Orders View Invoices														
view invoices	Upload		w Payments		9		-							
		Purchase Ord	lorr		Details		Manao					Review and Submit		
		T urchase ord	1015		Details		Manay	e rax				Veview and Submit		
Confirmation														
Attachment I	nvoice 1 h	as been added su	ccessfully but not con	mitted; it would be committed wh	en you commit the rest of the current tr	ransaction.								
Create Invoice: I	Details													
* Indicates requi	ed field											Cancel	Back Step	2 of 4 Next
Supplier							Invoice							
Customer		Remit To E Unique Remittar	Iank Account		Choose your Payment Address Choose your Bank account if applicable				* Invoice Number * Invoice Date Invoice Type * Invoice Description	29-Jan-2021 (example: 29-Ja Invoice Invoice for c for week 2/3 Describe the Go Attach a copy of	can only be Alphanumeric and Select n-2021) Consultant 'name' service 1/2021 - 2/14/2021 do ar Services to be billed for	e O Enter a e O ← th tachment List Add	a past date description fi e invoice las costs only Portable D invoice file	Dr
			Custo	Address CPS Business Group Address 125 South Clark Str										
Items														
PO Number	Line	Shipment	Item Number	Item Description	Supplier Item Number	Ship To	Availa	able Quantity	Quantity		Unit Price	e	UOM	Amount
3746058	1	1		Consultant	Consultant	Procurem	nent 20			10		160	Each	1600
												Cancel	Back Step	2 of 4 Next
Privacy Staten	ent				Home Orders Shipments	Accounts A	Admin Home Lo	gout Preference				Co	evright (c) 2006. Ora	de. All rights reserved

ORACLE isuppl	lier Portal		🛱 Navigator 👻 😨 Favorites 💌	Home Logout Preferences Help
			Navigator • • Pavonies •	Home Loyour Preferences help
Home Orders Shipments Acc				
View Invoices Upload Invoices Accounts: Upload Invoices >	View Payments			
Add Attachment		Attaching the PDF Invoice & other supporting		
Augument		documents		Cancel Add Another Apply
Attachment Summary Informatio	n			
		Enter a title here		
	Title Timesheet for the weeks 02/02/2021	Enter a ute nere		
Des	cription	^		
		~		
C	ategory From Supplier			
Define Attachment				
Type File	ocuments\TimeSheets\TimeSheet_Peter_02022021.pdf	Browse Choose the PDF files from your local machin	ne	
OURL				
OText				
	^			
	X			
				Cancel Add Another Apply
		Home Orders Shipments Accounts Admin Home Logout Prefere	ences Help	
Privacy Statement				Copyright (c) 2006, Oracle. All rights reserved.

Step	Action
7.	The system will take you to the Manage Tax page. Click on the 'Next' button.
8.	On the 'Review & Submit' Page, you are required to read and accept the agreement message displayed at the bottom of the page. Check the Agreement box, and click on the 'Submit' button.



ORAC	LE' is	upplier Portal							
						📅 Navigator 🔻 🛢	Favorites 🔻 Home Logour	Preferences Help Diagnos	tics
Home Orders	Shipments	Accounts Admin							
		ices View Payments							
		0		0	9		•		
		urchase Orders		Details	Manage	Tax	Review and	Submit	
Create Invoice: I	Manage Tax								
							Cancel	Save Back Step 3 of	f4 Ne <u>x</u> t
Supplier					Invoice				
	Uni	Tax Payer II * Remit To	r			Invoice Typ * Current	te 02-Feb-2021 De Standard	ss 02/01/2021 - 2/13/202 ist	1
Customer									
		* Cu	stomer Tax Payer ID CPS Customer Name CPS Business G Address 125 South Clari	roup k Street Chicago 60603 US					
Items									
PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity To Invoice UOM	Unit Price	Amount
3746058	1	1	Consultant	Consultant	Procurement	20	2.00 Each	160.00	320.00
		1	Terrane a		P		Cancel	Save Back Step 3 of	
About this Page	Privacy Stater	nent		Home Orders Shipments Accounts Adm	nin Home Logout Prei	ferences Help Diagnostics		Copyright (c) 2006, Oracle. A	All rights reserved.

ORAC	LE' isi	upplier Portal								
						📅 Navigator 🔻	🕞 Favorites 🔻	Home Logout Prefi	erences Help Diagnos	tics
Home Orders	Shipments	Accounts Admin								
View Invoices	Upload Invoid	ces View Payments								
		0		0	0			0		
		rchase Orders		Details	Manage Tax	<		Review and Submit		
Create Invoice: R	leview and Sub	mit								
								Cancel Save	Back Step 4 of 4	Sub <u>m</u> it
Supplier					Invoice					
	Uniq	Tax Payer ID * Remit To	XYZ Corp 45-9878906 BUSINESS 123 S Clark St Chicago IL 60602			* Invoio Invoio * Ci	iumber INV2321 ze Date 02-Feb-2021 ze Type Standard arrency USD cription Invoice for the consulting Attachm	g service of weeks 02/ ent <u>Attachment List</u>	01/2021 - 2/13/202	1
Customer										
		* Cus	Customer Tax Payer ID CPS Customer Name CPS Business G Address 125 South Clark	roup x Street Chicago 60603 US						
Items										
PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity To	Invoice UOM	Unit Price	Amount
3746058	1	1	Consultant	Consultant	Procurement	20		2.00 Each	160.00	320.00
Invoice Summa	ary									
									Items Total (USD)	320.00 320.00
By checking this	* C by checking this box you confirm the products delivered and/or services performed shall be in accordance with the terms, prices, delivery time, specifications, and conditions as recorded on this order. No substitution of products or change of any nature shall be made without prior written authorization of the school or originating unit. If you cannot fill this order as specified, please notify the school or originating unit as soon as possible									
								Cancel Save	Back Step 4 of 4	Submit
				Home Orders Shipments Accounts Adm	nin Home Logout Pref	erences Help Diagnostics				
About this Page	Privacy Statem								Copyright (c) 2006, Oracle. J	All rights reserved.

Step	Action
9.	A confirmation message will be displayed upon successful invoice submission.



ORACL	E iSt	pplier Portal					n	Navigator 🔻 👒	Favorites T Home Logout P	references Help Diagr	nostics
ome Orders Sh	ipments	Accounts Admin						Hariyalor -	Thomas - Thomas - Cogosa -	references map usign	in a second
		es View Payment									
		•		•		•			•		
	Pu	chase Orders		Details		Manage T	ax		Review and Subn	nit	
Confirmation									<u></u>		
	vas submitt	ed to our Accounts Pay	vable department on 02-Feb-2021. T	he confirmation number for this invoice is th	e invoice num	ber. You can query	its status by using Sea	rch by navigating	to the Home page.		
nvoice: INV2321											
									P	rintable Page Cre	eate Anothe
Supplier						Invoice					
	Uniqu	Tax Payer I * Remit T	er -	602			1	Invoice Type * Currency	02-Feb-2021 Standard		021
Customer		* Q	Istomer Tax Payer ID CPS Customer Name CPS Busine Address 125 South (ss Group Clark Street Chicago 60603 US							
Items											
PO Number	Line	Shipment	Item Description	Supplier Item Number		ip To	Available Oty		Quantity To Invoice UOM	Unit Price	
3746058	1	1	Consultant	Consultant		ocurement	20		2.00 Each	160.00	Amot 320.
Invoice Summary											
										Items Subtotal Total (USD)	320.0 320.0 320.0
v checking this box	r you confi n authoriz	rm the products de ation of the school o	livered and/or services perform or originating unit. If you canno	ed shall be in accordance with the term t fill this order as specified, please notif	s, prices, del y the school	ivery time, specif or originating un	ications, and condit it as soon as possib	ions as recorded le	on this order. No substitution of products or c	hange of any nature	shall be m

Search for an Uploaded Invoice

As a user with the 'Billing Administrator' or 'Business Administrator' role, you will be able to access the 'Upload Invoices' page and look for invoices uploaded online through the CPS Supplier Portal. The 'Upload Invoices' page will list only the invoices uploaded online through the Supplier Portal and NOT other invoices submitted through email.

Navigate to CPS Supplier Portal (Supplier Access) -> Home Page -> Accounts (Tab) -> Upload Invoice (Sub-tab)

Step	Action
1.	Optionally enter information for any of the search fields such as Invoice Number, Purchase Order Number etc and click on button.



Home Orders Shipmen	its Accounts Admin			🛱 Navigator 1	👻 🕞 Favorites 👻		Home Logout	t Preferences Help Diagnostics
View Invoices Upload In	voices View Payments							
Invoice Actions								
								Create Invoice With a PO Go
Search							_	
Note that the search is case in Supplier XYZ Invoice Number Invoice Date From Invoice Status			Purchase Order Number Invoice Amount Invoice Date To Currency					
Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount Purchase Order	Status	Withdraw	Cancel	Update	View Attachments
INV2321	02-Feb-2021	USD	320.00 3746058	In Process	56		2	()a
123456	02-Feb-2021	USD	160.00 3746058	Unsubmitted	56		1	
About this Page Privacy Sta	itement	- H	Home Orders Shipments Accounts Admin Home Logout Preferer	nces Help Diagnostics				Create Invoice With a PO