Job Aid: Create and Submit a PO-Related Invoice
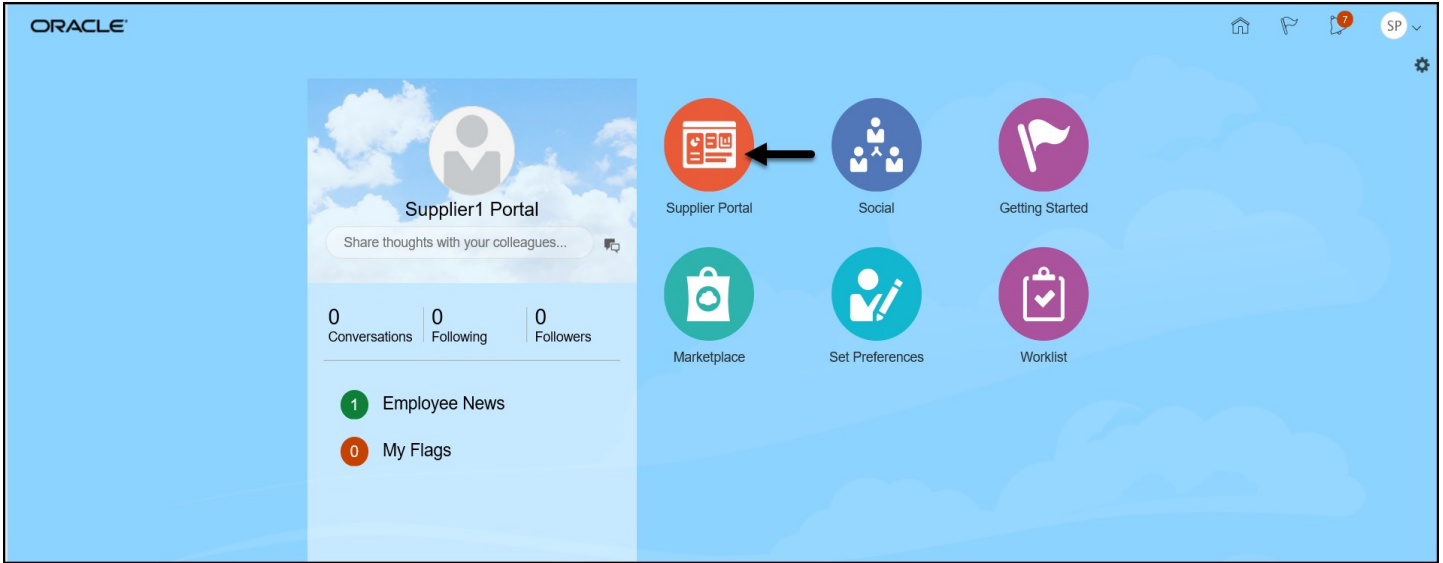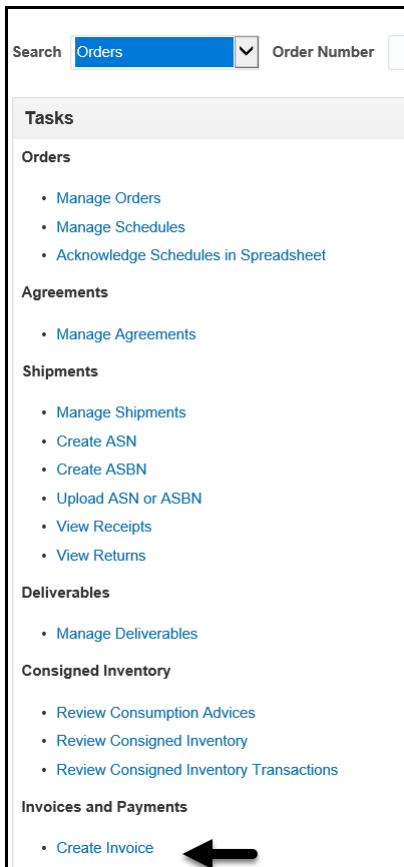

- Open your Chrome browser
- Access Oracle Procurement Cloud with your **User ID** and **Password**

- Click **Supplier Portal**

- Choose **Create Invoice**

*(Note all * field are required, as is Attachment)*

- Choose the **PO** to invoice against
- **Supplier Site** and the corresponding **Address** will default. An alternate value can be selected, if necessary
- Enter the **Number** of the invoice you are submitting
- Enter the invoice **Date**. The date cannot be earlier than today's date. *(If you have invoices held due to Voya's transition to Oracle Procurement Cloud, you may submit to Procurement@voya.com for exception processing.)*
- **Type** defaults to *Invoice.* Credit memos can also be submitted.


- Click the **+** next to **Attachments** to add a copy of the invoice. *Submissions without the invoice attached will be rejected.*
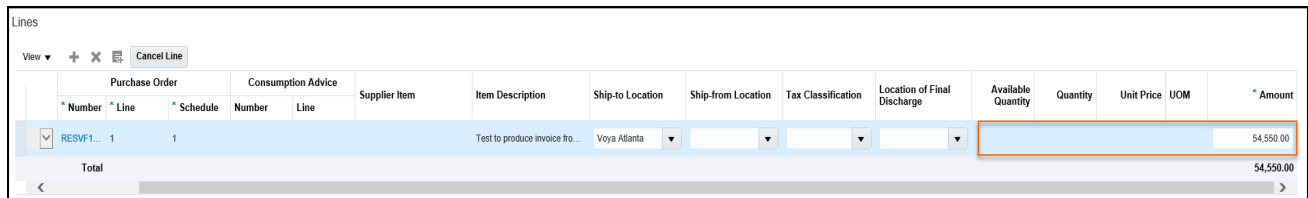

- **Verify** or **Update** your attachment
- Optionally, provide an attachment **Description**
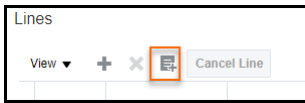
- In the Lines section, click to select the PO and add the lines
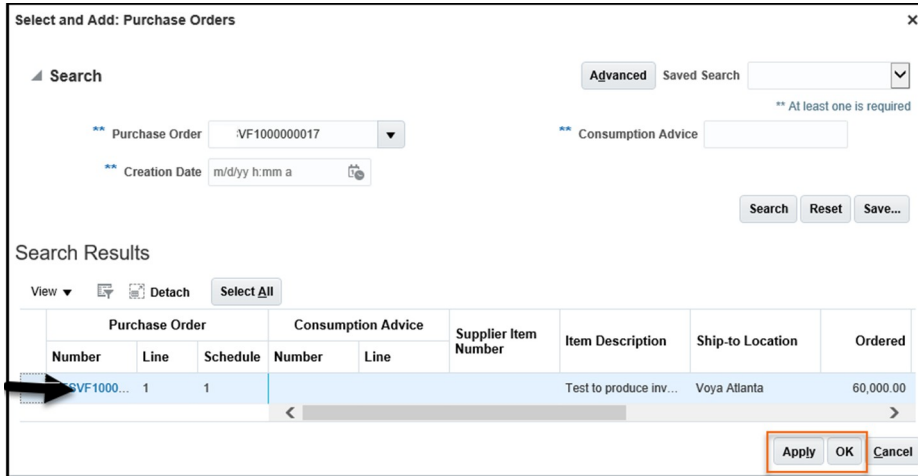
- Highlight the row associated with the PO number
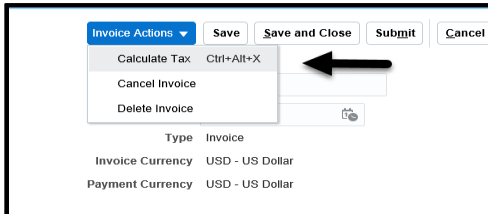- Click **Apply**
- Click **OK**

- **For amount-based PO's:** (as seen here) Review the **Amount.** If necessary, enter a lower amount to reflect what you are billing.
- **For quantity-based PO's**: Review the **Available Quantity** and **Quantity** fields. You can change the **Quantity** field to match the action amount you are billing for, but it cannot exceed **Available Quantity.**
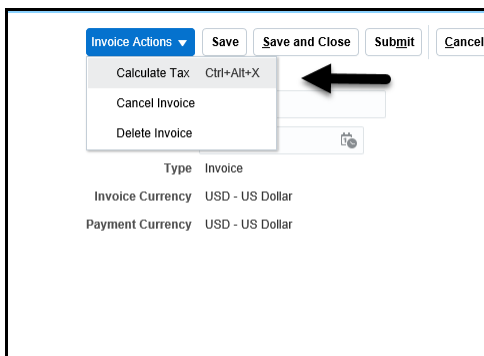
- If your invoice includes tax, click **Invoice Actions** ▼ and select **Calculate Tax**

- In the **Summary Tax Lines** section, click the tax line to open the **Percentage** and **Amount** fields
- Enter the appropriate percentage; the amount will auto calculate
  - Note: Tax amount must match the tax percentage

- Click Invoice Actions ▾ and select **Calculate Tax**

- Verify your Totals
  - If there is a discrepancy in the tax calculation, please contact Procurement@voya.com for assistance.

    Submit

  - Note at any point you can **Save** without submitting. Your invoice will be saved in an **Incomplete** (see next page) status in theManage Invoices section until you Submit.
- Confirm you are ready to submit
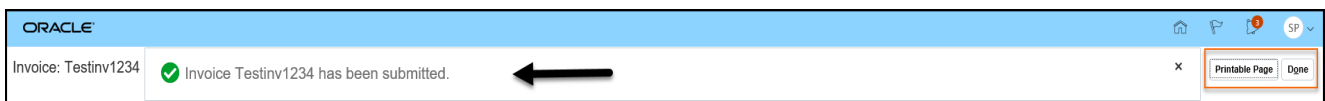
- Receive confirmation

- Optionally, click Printable Page

- Click Done

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Invoices in Incomplete status

Invoices that have been started but not submitted will remain in an Incomplete status until action is taken. An incomplete invoice can be edited or canceled.
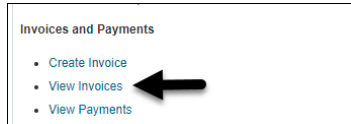
- From the Portal home page, select **View Invoices**

- Enter at least one of the following: **Invoice Number, Supplier** or **Purchase Order**
- Select *Incomplete* for the **Invoice Status**

- Click the **invoice number** to open the invoice in Edit mode

- Make any necessary adjustments to the invoice prior to submitting; or

    - Note you cannot update the invoice number or reuse the number once it's canceled.