



# Drexel University P2P Transformation

Create a PO-Based Invoice

# Agenda

- How to create a Manual PO based invoice
- How to add shipping and handling charges to an invoice

# Important: Points to be considered for creating a PO-Based Invoice

- Invoice can be created manually by navigating to Ariba Buying & Invoices from Guided Buying
- This QRG explains on how to access Buying & Invoices solution from Guided Buying and how to create a PO based invoice

# Create Invoice

**Drexel Ariba Buying** Find goods and services

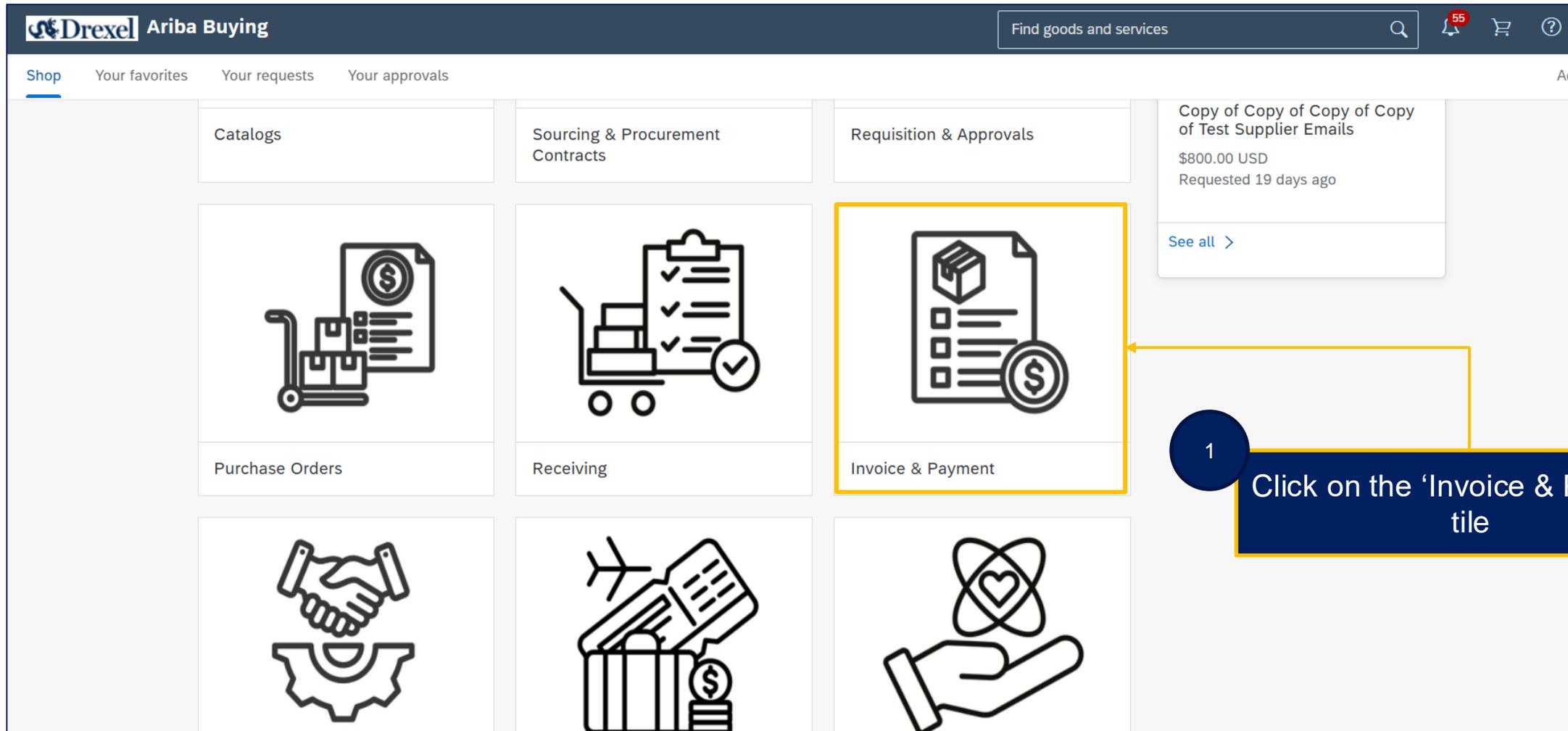
Shop Your favorites Your requests Your approvals

Catalogs Sourcing & Procurement Contracts Requisition & Approvals

Purchase Orders Receiving **Invoice & Payment**

Copy of Copy of Copy of Copy of Test Supplier Emails  
\$800.00 USD  
Requested 19 days ago  
[See all >](#)

1 Click on the 'Invoice & Payment' tile

The image shows a screenshot of the Ariba Buying interface. At the top, there is a header with the Drexel logo and the text 'Ariba Buying'. To the right of the header is a search bar with the placeholder text 'Find goods and services'. Below the header, there are navigation tabs: 'Shop', 'Your favorites', 'Your requests', and 'Your approvals'. The main content area is a grid of tiles. The tiles are: 'Catalogs', 'Sourcing & Procurement Contracts', 'Requisition & Approvals', 'Purchase Orders', 'Receiving', and 'Invoice & Payment'. The 'Invoice & Payment' tile is highlighted with a yellow border. To the right of the grid, there is a notification card with the text 'Copy of Copy of Copy of Copy of Test Supplier Emails', '\$800.00 USD', and 'Requested 19 days ago'. Below the notification card is a 'See all >' link. A callout box with a yellow border and a dark blue background contains the text '1 Click on the 'Invoice & Payment' tile'. The callout box is positioned to the right of the 'Invoice & Payment' tile, with a yellow arrow pointing from the callout box to the tile.

# Create Invoice (Continued)

The screenshot shows the Drexel Ariba Buying interface. At the top, the header includes the Drexel logo, 'Ariba Buying', a search bar with the text 'Find goods and services', and navigation icons for a shopping cart (with a red '55' notification) and a help icon. Below the header, the page title is 'Invoice & Payment'. The main content area features three tiles: 'View Your Invoices' (with a document icon and a dollar sign), 'View Invoices to Approve' (with a flow icon), and 'Link to SAP Buying & Invoicing' (with a shopping cart icon and a checklist). The 'Link to SAP Buying & Invoicing' tile is highlighted with a yellow border. A yellow callout box with a blue circle containing the number '2' points to this tile. The callout text reads: 'Click on the tile 'Link to SAP Buying & Invoicing' to access the Buying and Invoicing Solution'. Below these tiles, there is a section for 'Recurring Payments' with a 'Custom form' tab. The first tile in this section is 'Recurring Payment Request Form', which includes a location pin icon and the text: 'Request recurring payment to the supplier for an agreement already in-place'. Below this text is a search bar with the word 'recurring' entered. To the right of this tile is another tile with an icon of a hand holding two dollar signs, labeled 'View Your Payment Request Forms'.

# Create Invoice (Continued)

Jump to Navigation | Jump to Content **Test Site**

**DREXEL UNIVERSITY**  
Accounts Payable  
& Procurement Services

HOME CONTRACTS PROCUREMENT CATALOG MORE...Recent Manage **Create**

Invoice Supplier Invoice # Purchase Order #

**Common Actions**

- Create
- Requisition
- Invoice
- Credit Memo
- Advance Payment
- More
- Manage
- Administration
- My Tasks
- Forms and Extensions
- More

**To Do**

Escalated	37
Escalation...	1
New	2

**My Requisitions**

0 Denied

**2**  
Total Submitted

**My Receipts**

0 Denied

**0**  
Total Receipts

**Pinned Items**

0 New Pins

**0**  
Total Pins

**To Do**

Page 1

ID	Date ↓	From	Status	Title	Required Action
IRU0320884INVC1-764	12/18/2024	Telrose Corporation	Reconciling	U0320884INVC1 (\$30.00 USD)	Reconcile

**Recently Viewed**

3

Click on 'Create' button



# Create Invoice (Continued)

The screenshot displays the Drexel University Accounts Payable & Procurement Services interface. A blue callout box with the number '4' and the text 'Select the option 'Invoice' to navigate to invoice creation screen' points to the 'Invoice' option in the 'Create' dropdown menu. The interface includes a top navigation bar with 'HOME', 'CONTRACTS', 'PROCUREMENT', and 'CATALOG'. Below this is a search bar with fields for 'Invoice', 'Supplier Invoice #', and 'Purchase Order #'. A left sidebar lists 'Common Actions' such as 'Create', 'Requisition', 'Invoice', 'Credit Memo', 'Advance Payment', 'More', 'Manage', 'Administration', 'My Tasks', and 'Forms and Extensions'. The main content area features 'To Do' and 'My Requisitions' widgets. A 'Create' dropdown menu is open, listing various actions, with 'Invoice' highlighted in a yellow box. The bottom of the screen shows a table header with columns for 'ID', 'Date', 'From', 'Status', 'Title', and 'Required Action'.

**4** Select the option 'Invoice' to navigate to invoice creation screen

Drexel University Accounts Payable & Procurement Services

HOME CONTRACTS PROCUREMENT CATALOG MORE...▼

Invoice ▼ Supplier Invoice # Purchase Order #

Common Actions ▼

- Create
- Requisition
- Invoice
- Credit Memo
- Advance Payment
- More ▼
- Manage
- Administration
- My Tasks
- Forms and Extensions
- More ▼

To Do

My Requisitions

0 Denied

2 Total Submitted

Recent Manage Create ▼

- Advance Payment
- Analytical Report
- Compound Report
- Contract Request (Procurement)
- Contract Request (Sales)
- Contract Workspace (Internal)
- Contract Workspace (Procurement)
- Contract Workspace (Sales)
- Contractor Expense Sheet
- Contractor Survey
- Credit Memo
- Customer
- Guided sourcing project
- Guided sourcing request
- Invoice
- Knowledge Project
- Quick Quote Posting
- Quick Survey
- Recurring Payment Request Form
- Requisition
- Supplier
- Supplier Research Posting
- Time Sheet

ID Date ↓ From Status Title Required Action

# Create Invoice (Continued)

INV765

Save Submit Exit

Invoice Entry Approval Flow

Header Information   Upload Invoice Invoice Summary: \$0.00 USD [Details](#)

Type:  Non-PO  PO-Based  Contract-Based

Payment Terms: (no value)

Ship From: (no value) 

Ship To: Ariba - St. Louis   
800 N. Lindbergh Blvd.  
St. Louis MO 63137  
United States

Purchase Orders: \* | 

Supplier: \* (no value) 

Supplier Contact: (no value) [select]

Supplier Invoice #: \*

Invoice Date: \* Wed, 18 Dec, 2024 

On Behalf Of: Jithin B 

Bank Code: (no value)

Remit To Address: (no value) 

Payment Date:

5 Select the option 'PO-Based' to create invoice against a PO

6 Enter the PO Number or select from the dropdown  
(All the information from the PO will be auto populated to the rest of the fields)

# Create Invoice (Continued)

INV765 [Save](#) [Submit](#) [Exit](#)

**7** Add the necessary attachment

[Invoice Entry](#) [Approval Flow](#)

Header Information ⌵   [Upload Invoice](#) Invoice Summary: \$0.00 USD [Details](#)

Type:  Non-PO  
 PO-Based  
 Contract-Based

Payment Terms: (no value)

Purchase Orders: \*  ⌵

Ship From:  ⌵

Supplier: \*  ⌵

Ship To:  ⌵

Supplier Contact: (no value) [ [select](#) ]

800 N. Lindbergh Blvd.

Supplier Invoice #: \*

St. Louis MO 63137

Invoice Date: \*  

United States

On Behalf Of:  ⌵

Remit To Address:  ⌵

Bank Code: (no value)

Payment Date:

# Create Invoice (Continued)

INV765 Save Submit Exit

**Invoice Entry** | Approval Flow

Header Information ⌵ 📎 💬 📄 Upload Invoice Invoice Summary: \$2,260.00 USD [Details](#)

Type:  Non-PO  PO-Based  Contract-Based

Payment Terms: **Net 30 Days**

Purchase Orders: \* UC320884 ⌵ [Add more](#)

Supplier: \* **Telrose Corporation**

Supplier Contact: **Telrose Corporation** [ select ]

Ship From: **Telrose Corporation** ⌵  
674037 ATTN Lock Box Services, Mc 7539 Telrose Corp Inc, P O Box 67000  
Detroit MI 48267-4037  
United States

Supplier Invoice #: \* **U0320884INV1**

Invoice Date: \* **Wed, 18 Dec, 2024** 📅

Ship To: **Drexel University** ⌵  
3141 Chestnut Street  
PHILADELPHIA PA 19104  
United States

On Behalf Of: **George F. Matuch** ⌵

Remit To Address: **674037 ATTN Lock Box Services, Mc 75...** ⌵  
674037 ATTN Lock Box Services, Mc 7539 Telrose Corp Inc, P O Box 67000  
Detroit MI 48267-4037

Bank Code: (no value)

Payment Date:

8 **Verify the Supplier name and Supplier contact name**

9 **Verify the remittance location**

10 **Enter the Supplier Invoice number**



# Create Invoice (Continued)

Department: \* Academy of Natural Sciences

My Labels: [Apply Label...](#) ⓘ

### Header Taxes, Charges, and Discount

Name ↑	Type	Tax Rate	Amount
No items			

[Delete](#) [Add ▼](#) [Update](#)

### Line Items (3)

No. ↑	Description	Order ID	Qty	Unit	Price	Amount	Discount	Charges	Taxes	Gross Amount	Accounting	Details
<input type="checkbox"/>	1	Test Item	U0320884	92	Each	\$10.00	USD		USD	\$920.00 USD	(1)	<a href="#">Details</a>
<input type="checkbox"/>	2	Test Item	U0320884	142	Each	\$5.00	USD		USD	\$710.00 USD	(1)	<a href="#">Details</a>
<input type="checkbox"/>	3	Test Item	U0320884	42	Each	\$15.00	USD		USD	\$630.00 USD	(1)	<a href="#">Details</a>

[Delete ▼](#) [Copy](#) [Edit](#) [Add Item Details ▼](#) [Import Accounting](#) [Export Accounting](#) [Add Item ▼](#) [Update](#)

**11** Select the department from the drop down

**12** Enter the quantity of item to be invoiced

**13** Verify the price the of item to be invoiced

# Create Invoice (Continued)

No items

Delete Add Update

14 Click the button 'Add Item Details' to add any additional charges  
(e.g. Taxes, Shipping or Special Handling)  
\*Withholding taxes should not be added in SAP\*

Line Items (3)

<input checked="" type="checkbox"/>	No. ↑	Description	Order ID	Qty	Unit	Price	Amount	Discount					
<input checked="" type="checkbox"/>	1	Test Item	U0320884	1	Each	\$10.00 USD	\$10.00 USD		USD	\$10.00 USD	(1)	Details	
<input checked="" type="checkbox"/>	2	Test Item	U0320884	1	Each	\$5.00 USD	\$5.00 USD		USD	\$5.00 USD	(1)	Details	
<input checked="" type="checkbox"/>	3	Test Item	U0320884	1	Each	\$15.00 USD	\$15.00 USD		USD	\$15.00 USD	(1)	Details	

Delete Copy Edit Add Item Details Import Accounting Export Accounting Add Item Update

- Taxes
- Charges
- Withholding Taxes

Base Amount: \$30.00 USD  
Discount: \$0.00 USD  
Charge: \$0.00 USD  
Tax: \$0.00 USD  
Payable To Supplier: \$2,260.00 USD

# Create Invoice (Continued)

**16** Select the charge type from the drop down

**17** Select 'Shipping or Handling charges'

**Add Charge**

Charge Type: \* (no value) ▾

Amount: (no value)

Apply Amount: Handling Charge  
Shipping Charges

Add Cancel

No. ↑	Description	Order ID	Qty	Unit	Taxes	Gross Amount	Accounting	Detail
1	Test Item	U0320884	1	Each		\$10.00 USD	(1)	Detail
2	Test Item	U0320884	1	Each		\$5.00 USD	(1)	Detail
3	Test Item	U0320884	1	Each		\$15.00 USD	(1)	Detail

Base Amount: \$30.00  
Discount: \$0.00

# Create Invoice (Continued)

The screenshot shows a software interface for creating an invoice. A modal dialog box titled "Add Charge" is open in the center. The dialog contains the following elements:

- Charge Type:** A dropdown menu with "Shipping Charges" selected.
- Amount:** A text input field containing "10" followed by "USD".
- Apply Amount:** Two radio button options: "Divided between all lines" (unselected) and "To each line individually" (selected).
- Buttons:** "Add" (highlighted in blue) and "Cancel".

Two callout boxes with yellow arrows point to specific elements in the dialog:

- Callout 18:** A dark blue box with white text "Add the shipping charges" pointing to the "Shipping Charges" dropdown.
- Callout 19:** A dark blue box with white text "Click 'Add' button" pointing to the "Add" button.

In the background, a table of "Line Items (3)" is visible with columns for No., Description, Order ID, Qty, and Unit. The items are all "Test Item" with Order ID "U0320884" and quantity "1".

# Create Invoice (Continued)

Line Items (3) ☰

<input type="checkbox"/>	No. ↑	Description	Order ID	Qty	Unit	Price	Amount	Discount	Charges	Taxes	Gross Amount	Accounting	Details
<input type="checkbox"/>	1	Test Item	U0320884	1	Each ▾	\$10.00 USD ▾	\$920.00 USD	<input type="text"/> USD			\$920.00 USD	(1)	<a href="#">Details</a>
<input type="checkbox"/>	2	Test Item	U0320884	1	Each ▾	\$5.00 USD ▾	\$710.00 USD	<input type="text"/> USD			\$710.00 USD	(1)	<a href="#">Details</a>
<input type="checkbox"/>	3	Test Item	U0320884	1	Each ▾	\$15.00 USD ▾	\$630.00 USD	<input type="text"/> USD			\$630.00 USD	(1)	<a href="#">Details</a>

↳

Base Amount: \$2,260.00 USD  
Discount: \$0.00 USD  
Charge: \$0.00 USD  
Tax: \$0.00 USD  
Payable To Supplier: \$2,260.00 USD

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Once completed, Click 'Submit' to submit the invoice

# Create Invoice (Continued)

Drexel University

[HOME](#) [CONTRACTS](#) [PROCUREMENT](#) [CATALOG](#) [MORE... ▾](#) [Recent ▾](#) [Manage ▾](#) [C](#)

## New Invoice - Submitted

Your request has been submitted for approval. To monitor the progress of the request through the approval process, check the Status column in the My Documents content item on the home dashboard.

**INVU032088413INV1-768** has been submitted.

[Print](#) a copy of this request

[View](#) the status of your request

[Add](#) labels to tag this document

[Continue](#) working on other invoices

Create the [same](#) type of request

Return to the Ariba [Home](#) Page

21

Click the 'View' button to display the status of the invoice

# Create Invoice (Continued)

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also pri

Copy Withdraw Edit Print

22 Click the button 'Approval Flow' to view the approval workflow

Summary **Approval Flow** Reference History

Submitted → Active (Accounts Payable, Accounts Payable (Limited)) → Approved