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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) →   Home Page → Accounts (Tab) → 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.

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

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.

Step	Action
5.	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.

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

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.

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

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 `Go` button.