


Create Supplier Invoice Request

Lynn University procurement policies require to create a PO to process all procurement requests. On a few occasions, you may need to request payment directly to the Procurement Department. This task allows you to create a payment request for goods or services in Workday.

 This job aid is intended for staff with authority to create requisitions and procure goods and services for Lynn University.

Submit a Supplier Invoice request only for invoices not paid by Lynn JPM card or invoices without PO.

On this job aid

Create Supplier Invoice Request

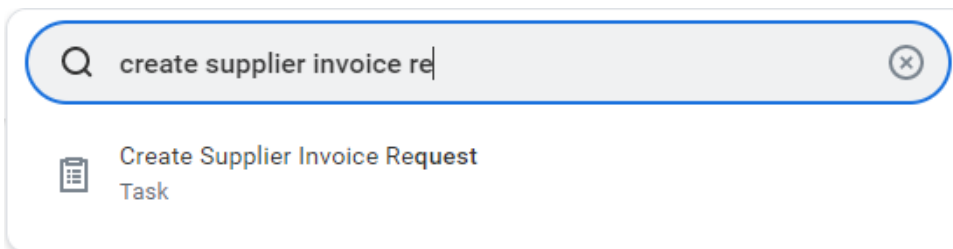
[View Supplier Invoice Requests](#)


[Edit Supplier Invoice Request](#)

[Cancel Supplier Invoice Request](#)

Create Supplier Invoice Request

1. On the search bar, Search for and select **Create Supplier Invoice Request - Task**.



2. **Primary Information:** Fill out the following fields.
 - a. Invoice Date: Defaults to today's date, but should be replaced with the date on the vendor's invoice.
 - b. Invoice Received Date: Enter the date you received the invoice from the vendor.
 - c. Company (Required Field): Defaults to Lynn University.
 - d. Supplier (Required Field): Click the Prompt icon  to search for and select the supplier. If a supplier is not found, you must create a [Supplier Request](#) before processing the payment.
 - e. Remit-To Connection: Will pre-populate if the supplier has a remit-to connection.
 - f. Currency (Required Field): Will default to USD
 - g. Control Total Amount: Leave blank
 - h. Supplier's Invoice Number: Enter the reference or invoice number vendor's document.

Primary Information

Invoice Date	*	04 / 28 / 2020	
Invoice Received Date		MM / DD / YYYY	
Company	*	x Lynn University	...
Supplier	*		...
Remit-To Connection			...
Currency	*		...
Control Total Amount		0	
Supplier's Invoice Number			

3. Additional Information: Fill out the following fields.

- Ship-To Address: Will default to Lynn's address, but it is editable to your specific building.
- Payment Terms: Lynn's default payment terms are Net 30, which means the invoice will be paid 30 days from the invoice date. The field will default to Upon Receipt.
- Default Due Date: Will populate based on the Payment Terms selection.
- Reference Type: If applicable, select the international reference type for the invoice. This is usually not applicable.
- Handling Code: For all payments, click the Prompt icon to select the handling code for the invoice if applicable.
- Statutory Invoice Type: Ignore this field.
- Freight Amount: Enter the amount of any shipping/handling charges
- Tax Amount: Enter the amount of any taxes charged. Please note, in most states, Lynn is exempt from sales tax.
- Memo: Enter a brief description of what was purchased and what the business purpose was.

Additional Information

Ship-To Address	x 3601 N. Military Trail Boca Raton, FL 33431 United States of America	...
Payment Terms	x Upon Receipt	...
Default Due Date	04/28/2020	
Reference Type		...
Handling Code		...
Statutory Invoice Type		...
Freight Amount	0.00	
Tax Amount	0.00	
Memo		

4. Scroll down for Invoice **Goods/Service Lines**:

- Select Goods or Service
- Item: Ignore this field.
- Item Description: Describe what is on the vendor's invoice.
- Spend Category: Select the appropriate Spend Category based on what was purchased.
- Quantity: If goods selected, enter how many units are being requested. If services, item will be grayed out.
- Unit of Measure: If goods selected, enter the appropriate Unit of Measure. If services, item will be grayed out.
- Unit Cost: If goods selected, record the cost of the item/service. If services, item will be grayed out.

- h. Extended Amount: Defaults based on Quantity multiplied by Unit Cost. If services selected, enter total amount here.

0.00 USD	0	Lines
<input checked="" type="radio"/> Goods Line <input type="radio"/> Service Line		
Item	<input type="text"/>	
Item Description	<input type="text"/>	
Spend Category	<input type="text"/>	
Quantity	<input type="text" value="0"/>	
Unit of Measure	<input type="text"/>	
Unit Cost	<input type="text" value="0.00"/>	
Extended Amount	<input type="text" value="0.00"/>	

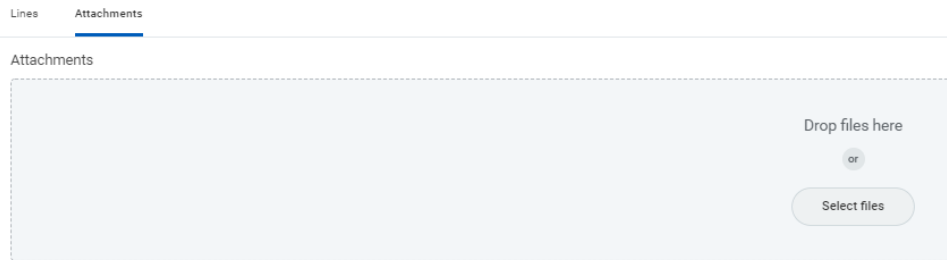
- i. Cost Center: Click the Prompt icon to select the cost center to which the request applies. Remember your cost center is the letters CC plus your department number.
- j. Program: click the Prompt icon to select the program to which the request applies (if applicable).
- k. Project: click the Prompt icon to select the project to which the request applies (if applicable).
- l. Gift: click the Prompt icon to select the gift to which the request applies (if applicable).
- m. Grant: click the Prompt icon to select the grant to which the request applies (if applicable).
- n. Additional Worktags: These worktags will be automatically added according to the cost center and other worktags.

*Cost Center	<input type="text" value="X CC684 Information Systems"/>
Program	<input type="text"/>
Project	<input type="text"/>
Gift	<input type="text"/>
Grant	<input type="text"/>
*Additional Worktags	<input type="text" value="X Fund: FD10 Without Donor Restriction"/> <input type="text" value="X NACUBO: NACUB035 Institutional Support"/>

- o. Billable: Ignore this field.
- p. Memo (Optional): Enter a brief memo for the invoice request line.
- q. Internal Memo (Optional): Enter a brief memo with any details for other users within the college, such as payment instructions or tax specifications.

Billable	<input type="checkbox"/>
Memo	<input type="text"/>
Internal Memo	<input type="text"/>

5. Under the **Attachments** tab, attach any documents to support the request, such as invoices. **These attachments are required.**



The screenshot shows a software interface with two tabs: 'Lines' and 'Attachments'. The 'Attachments' tab is selected and highlighted with a blue underline. Below the tabs, the word 'Attachments' is displayed. A large, light blue rectangular area with a dashed border serves as a file upload zone. On the right side of this area, the text 'Drop files here' is visible, followed by a small circle containing the word 'or'. Below this, there is a button labeled 'Select files'.

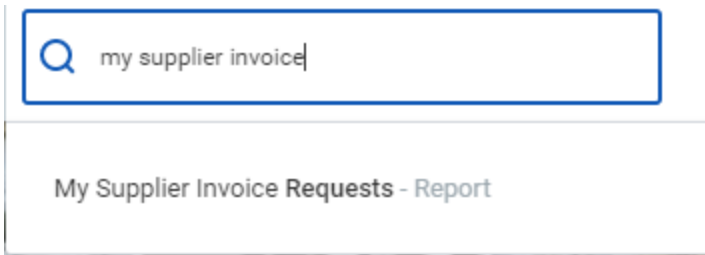
6. Click **Submit** at the bottom of the page.

Note

The request will route to your Cost Center/Program/Project/Gift manager and Accounts Payable for review and approval. After its approval, Accounts Payable will create the supplier invoice from the request, which will be checked against the available budget and routed to the Cost Center/Program/Project/Gift manager for approval prior to payment. Depending on what was purchased and the amount, it may require additional approvals.

View Supplier Invoice Requests

1. Search and select My Supplier Invoice Requests report



The screenshot shows a search bar with a magnifying glass icon on the left and the text 'my supplier invoice' inside. Below the search bar, a search result is displayed: 'My Supplier Invoice Requests - Report'.

2. Enter search parameters if needed. Click OK

My Supplier Invoice Requests

Supplier

Supplier's Invoice Number

Request Number

Request Status

Invoice Date On or After

Invoice Date On or Before

Due Date On or After

Due Date On or Before

Approved By Workers

3. A list of your supplier invoice requests will appear.

← My Supplier Invoice Requests Actions

Invoice Date On or After 06/01/2020

1 item

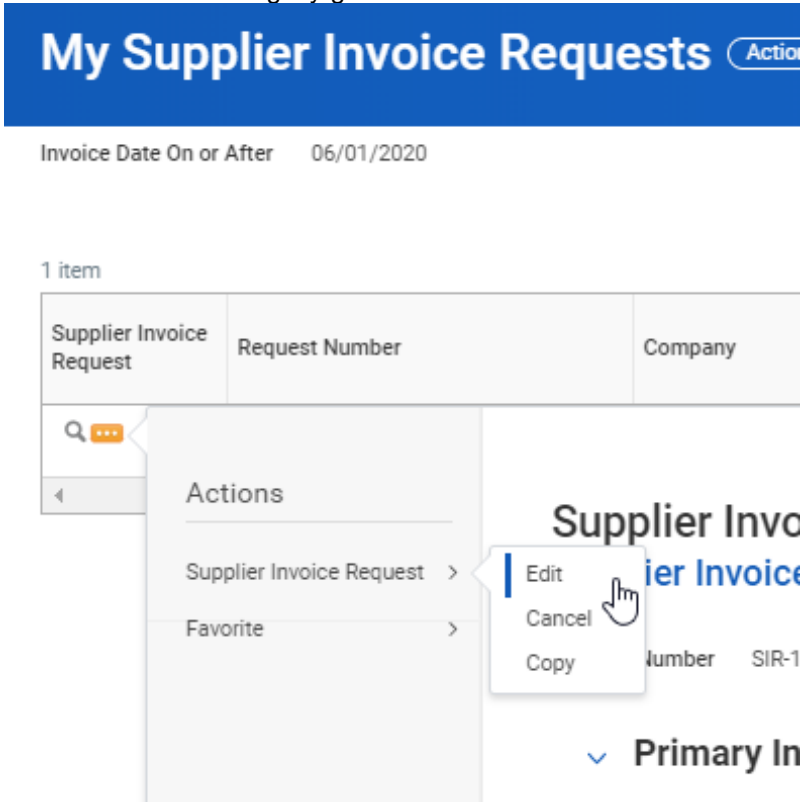
Supplier Invoice Request	Request Number	Company	Request Status	Supplier	Supplier's Invoice Number
Q	SIR-10000011	Lynn University	In Progress	101 Mobility	12345678

Edit Supplier Invoice Request

While your request is in process, you can edit your request.

1. Search your supplier Invoice request

2. Hoover next to the magnify glass. Click on the related action button (3 dots)



3. Select Edit.
4. Your invoice request will be available for changes.

Edit Supplier Invoice Request

Supplier Invoice Request Q Status In Progress Request Number SIR-10000011 Requester

Primary Information

Invoice Date * 07 / 01 / 2020

Invoice Received Date MM / DD / YYYY

Company * x Lynn University ...

Supplier * x 101 Mobility ...

Remit-To Connection (empty)

Currency * x USD ...

Control Total Amount 0.00

Supplier's Invoice Number 12345678

Lines Process History Attachments

+ Add

phones 900.00 USD 3 Lines

Goods Line

Service Line

Submit Save for Later Cancel

Cancel Supplier Invoice Request

While your request is in process, you cancel your request.

1. Search your supplier Invoice request
2. Hoover next to the magnify glass. Click on the related action button (3 dots)
3. Select Cancel

My Supplier Invoice Requests Actions

Invoice Date On or After 06/01/2020

1 item

Supplier Invoice Request	Request Number	Company

Search

Actions

- Supplier Invoice Request >
- Favorite >

Edit

Cancel

Copy

Supplier Invoice Request Number SIR-1

Primary Invoice

4. Click OK to confirm your cancellation.

Confirm Supplier Invoice Request Cancel

Please confirm that you wish to cancel the Supplier Invoice Request below.

Supplier Invoice Request Eligible to Cancel *

x Supplier Invoice Request: SIR- ...
10000011

Supplier Invoice Request Request Number SIR-10000011 Status In Progress Requester Mariana Isles

▼ Primary Information

Invoice Date 07/01/2020

Invoice Received Date (empty)

Company Lynn University

Supplier 101 Mobility

Currency USD

Control Total Amount 0.00

Supplier's Invoice Number 12345678

Request Lines Process History Attachments

phones
900.00 USD

3

Lines

Request Line

Line Type Goods Line

Item (empty)

Item Description phones

Spend Category Equipment

OK

Cancel

5. On future reports your request will display with the status "Canceled"

1 item

Supplier Invoice Request	Request Number	Company	Request Status
	SIR-10000011	Lynn University	Canceled