



**New Jersey Department of the Treasury
Division of Purchase and Property**



**Quick Reference Guide:
ACCESSING PURCHASE ORDERS, CHANGE
ORDERS, AND ELECTRONIC INVOICING**

Sellers



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About this guide

This Quick Reference Guide is designed to help Vendors understand how to access Purchase Orders (POs) and Change Orders sent to them through NJSTART. PO and Change Order notifications will be sent to the primary email or mailing address associated with the Vendor’s profile, not to individual Vendor users. If your entity has received a notification about a PO or Change Order via email or mail, follow the steps in this guide to access and review the document. We have also included a section on Invoicing on page 7.

Note: Master Blanket POs received from the Division of Purchase & Property are to confirm a Vendor is on contract. POs received from using agencies are to execute purchases.

The first step is to sign into NJSTART using your Login ID and Password.

Home - Welcome Back Dave Dough

News(4) Vendor Communication(1) Bids(134) PO(0) Quotes(1) Vendor Performance(0)

| News ID | Effective Date | Category | Title |
|---------|----------------|----------|-------------------------------------------------|
| 58 | 01/02/2019 | Notices | Email Address Updates |
| 57 | 01/02/2019 | Notices | Availability of Electronic Invoicing in NJSTART |

1.0 Finding a Purchase Order

After login you will see your home page and tabs underneath the **Welcome Back** message. To find a PO or Change Order, click on the PO tab. The POs and/or POs with Change Orders that you have not yet acknowledged will be listed first. You can access a PO by clicking on the link in the Purchase Order # column on the left side of the screen.

News(0) Vendor Communication(1) Bids(115) **PO(11)** Quotes(1) Invoices(8) Vendor Performance(0)

Purchase Orders / Change Orders (Un-Acknowledged)

| Purchase Order # | Organization | Purchase Order Date | Fiscal Year | Description | Status | Vendor Name | Total | Number of Change Orders |
|------------------------------------|-----------------------------------|---------------------|-------------|--------------------|------------|-------------------------|--------|-------------------------|
| 16-FLEET-00068-166 | Division of Purchase and Property | 01/09/2019 | 2019 | PO Acknowledgement | 3PS - Sent | Diamond Chemical Co Inc | \$2.16 | None |

Purchase Orders - Sent

| Purchase Order # | Organization | Purchase Order Date | Fiscal Year | Description | Status | Vendor Name | Total | Number of Change Orders |
|------------------------------------|-----------------------------------|---------------------|-------------|--------------------|------------|-------------------------|--------|-------------------------|
| 16-FLEET-00068-166 | Division of Purchase and Property | 01/09/2019 | 2019 | PO Acknowledgement | 3PS - Sent | Diamond Chemical Co Inc | \$2.16 | None |
| 16-FLEET-00068 | Division of Purchase | 01/04/2019 | 2019 | notes test | 3PS - Sent | Diamond | \$0.72 | None |



1.1 Acknowledging a Purchase Order

Upon selecting a PO, you will be asked to acknowledge receipt of the PO and its Change Orders before it will display. Acknowledging a PO indicates that you are aware of it and that you will respond to it.

Check both of the check boxes on the left and click on the Proceed button to:

- Acknowledge your receipt of the PO and its Change Orders, and
- Notify the requestor that you have received the PO.

Download Acknowledgement

I am acknowledging receipt of this purchase order and/or its change order(s).

Notify requestor of receipt of this purchase order and/or its change order(s).

1.2 Viewing a Purchase Order

The PO will be shown with the number prominently displayed in the upper left hand corner of the document.

Release Purchase Order 16-FLEET-00068:39 Status: 3PRS - Ready to Send

General Items Vendor Address Accounting Routing Attachments Notes Change Orders Reminders Summary

Header Information

| | | | | | |
|-------------------------------|-----------------------------------------|------------------------|------------------------|---------------------------|--------------|
| Purchase Order Number: | 16-FLEET-00068 | Release Number: | 39 | Short Description: | TEST |
| Status: | 3PRS - Ready to Send | Purchaser: | Africa Nelson | Receipt Method: | Quantity |
| Fiscal Year: | 2017 | PO Type: | Release | Minor Status: | |
| Organization: | Division of Purchase and Property | Location: | OPNS - Operations | Type Code: | |
| Department: | DPP - Division of Purchase and Property | Entered Date: | 10/24/2017 03:58:28 PM | Control Code: | |
| Alternate ID: | | Retainage %: | 0.00% | Print Dest Detail: | If Different |
| Days ARO: | 14 | Promised Date: | | Actual Cost: | \$1.44 |
| Required By Date: | | Tax Rate: | | | |
| Pcard Enabled: | No | | | | |
| Contact Instructions: | Contact Africa Nelson at (609)984-6233 | | | | |
| Invoice Method: | Three Way Match | | | | |
| Print Format: | PO Print | | | | |

Additional sections of this sample Purchase Order appear on the next page.

Note: POs, Bids, Contracts, Quotes, and Invoices (if any) can also be found by clicking on the "Documents" dropdown list at the upper right-hand portion of the Home screen in the Seller role.

Home - Welcome Back David Rodie

News(0) Vendor Communication(0) Bids(242) PO(0) Quotes(1) Invoices(0) Vendor Performance(0)

Documents ^

POs v

Bids v

Contracts v

Quotes v

Invoices v



| | | |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <p>Ship-to Address: Division of Purchase and Property 33 West State Street Trenton, NJ 08625 US Email: test@periscopeholdings.com Phone: (123)456-7890</p> <p>T Number:</p> <p>NJ Cooperative Purchasing: No</p> <p>Green Blanket PO: No</p> <p>Emergency Blanket PO: No</p> <p>Small Business Category:</p> <p>Performance Bond Required: No</p> <p>Procurement Efficiency Assessment Indicator:</p> <p>Agency Reference Number:</p> <p>Corporate Account Number:</p> <p>Number of Extensions Available:</p> <p>Number of Extensions Used:</p> <p>Number of Months Available:</p> <p>Number of Months Used:</p> <p>Transition Days Available:</p> <p>Transition Days Used:</p> <p>State Contract Manager:</p> <p>State Contract Manager Phone:</p> <p>State Contract Manager Email:</p> | <p>Bill-to Address: Division of Purchase and Property 33 West State Street Trenton, NJ 08625 US Email: test@periscopeholdings.com Phone: (123)456-7890</p> |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Current Org: **Division of Purchase and Property** | April 16, 2018 2:39:34 PM EST

Vendor Information & PO Terms

| | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|
| <p>Vendor: V00000296 - Diamond Chemical Co Inc</p> <p>Remit-to Address: Patrick Conboy PO BOX 51021 NEWARK, NJ 071015121 US Email: test@periscopeholdings.com Phone: (123)456-7890 Id: 9684 Alternate Id: 22159580500</p> <p>PO Mailing Address: Chelsea Cooper Union Ave & DuBois Street East Rutherford, NJ 07073 US Email: test@periscopeholdings.com Phone: (123)456-7890 Id: 297</p> | <p>Preferred Delivery Method: Email</p> <p>Payment Terms: Net 60</p> <p>Shipping Terms: F.O.B., Destination</p> | <p>Shipping Method:</p> <p>Freight Terms:</p> |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|

Item Information

Show 25 entries | First Previous 1 Next Last

Showing 1 to 1 of 1 entries

| Blanket/Contract #/Line # | Receipt Method | Qty | Minimum Order Quantity | Unit Cost | Net Unit Cost | UOM | Discount % | Total Discount Amt. | Tax Rate | Tax Amount | Freight | Total Cost |
|---------------------------|----------------|-----|------------------------|-----------|---------------|------------|------------|---------------------|----------|------------|---------|------------|
| 16-FLEET-00068 / 1 | Quantity | 2.0 | 0.0000 | \$0.72 | \$0.72 | LB - Pound | 0.00% | \$0.00 | 0.0% | \$0.00 | \$0.00 | \$1.44 |

Item # 1: Dishwashing, Automatic Detergent, Destaining Detergent Without Metal Protection in Solid Encapsulated/Granulated Form for General Use. Solid: Yes Encapsulated/Granulated: Yes Brand Name: Power Plus 3PRS - Ready to Send

NIGP Class: 485-38
Dishwashing Compounds, Hand and Machine Type (Including Rinse Solutions)

Manufacturer: Brand: Model:
Make: Packaging:

Current Org: **Division of Purchase and Property** | April 16, 2018 2:40:59 PM EST



1.3 Printing a Purchase Order

All POs issued to you will stay within NJSTART indefinitely, so you do not need to print them out. However, if you would like to print out a paper copy of a PO, click on the Print button at the bottom of the invoice or press “Ctrl P.”



1.4 Finding and Acknowledging a Change Order

You will be notified of Change Orders if an agency has made changes to a PO it has previously sent to you. Notifications of Change Orders also will be sent to the primary email address associated with the Vendor’s profile, and not to individual users established for the Vendor’s profile.

Change Orders are accessed in exactly the same way as the PO, and are visible on the PO document in the Change Orders section. Just like POs, you will be asked to acknowledge receipt of Change Orders upon selecting the PO to view. Check both of the check boxes on the left and click on the Proceed to view the PO and its Change Order(s).



Click the number of the Change Order to open and view the change that was made.



2.0 Creating an Electronic Invoice (as a Vendor)

NJSTART enables Vendors to submit invoices electronically to New Jersey State agencies, as an alternative to hardcopy invoices.

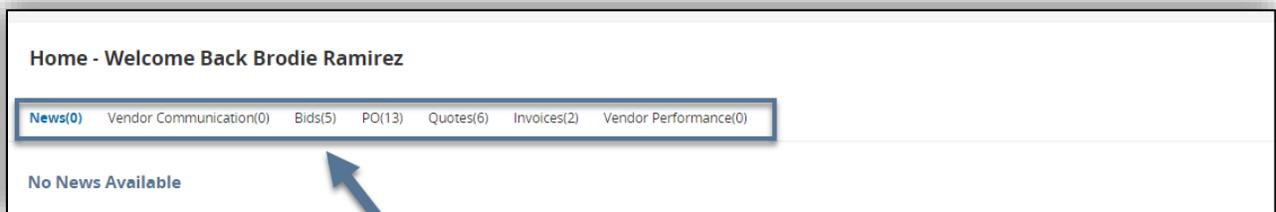
The purpose of submitting an invoice electronically is to make invoice processing more efficient and to reduce the data entry burden on Accounts Payable users. Typically, the Vendor mails invoices to the Accounts Payable user, who enters the Invoice into the system.

The actions outlined in this guide will be accomplished in the “Seller” role. As such, a user should navigate to the Seller role to complete the activities. To select the appropriate role, click on the Account Icon to the upper right-hand corner at the top of the page after signing in. 

Finally, in this guide, the term "Agency" is used to refer to a New Jersey State Agency that has purchased a Vendor’s product or service.

2.1 Homepage

The purpose of the Homepage is to present documents the Seller may take action on (e.g., Open Solicitations, Purchase Orders) or that the Seller has created in the past (e.g., Quotes, Invoices). The Homepage also presents the latest news items or updates regarding NJSTART.

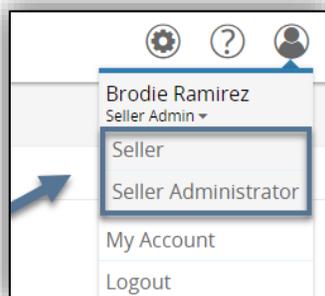


If the user's Homepage does not look like the one above, the user should navigate to the Seller role. To change roles, follow the steps shown below.

Step 1: Click the Account Icon in the upper right of the Homepage

Step 2: Click the down arrow under the User Name

Step 3: Select Seller





2.2 Purchase Orders

Step 1: Click the PO tab

The Purchase Order tab is divided into three sections: Purchase Orders/Change Orders (Un-Acknowledged), Purchase Orders - Sent, and Subcontractor Purchase Orders.

News(0) Vendor Communication(0) Bids(16) **PO(22)** Quotes(4) Invoices(4) Vendor Performance(15)

Purchase Orders / Change Orders (Un-Acknowledged)

| Purchase Order # | Organization | Purchase Order Date | Fiscal Year | Description | Status | Vendor Name | Total | Number of Change Orders |
|------------------|----------------------------|---------------------|-------------|---------------------------------------------|------------|--------------------------|----------------|-------------------------|
| PO17-0000038 | Central Procurement Agency | 12/04/2017 | 2017 | Contract for Hosting Services | 3PS - Sent | Software Solutions, Inc. | \$200,000.00 | None |
| PO17-0000037 | Central Procurement Agency | 10/24/2017 | 2017 | Contract for Dell computers for Police Dept | 3PS - Sent | Dermot Kennedy LLP | \$40,000.00 | None |
| PO17-0000036 | Central Procurement Agency | 10/03/2017 | 2017 | AntiVirus software | 3PS - Sent | Software Solutions, Inc. | \$97,388.00 | None |
| PO17-0000029 | Central Procurement Agency | 08/21/2017 | 2017 | Continuing Education Catering Contract | 3PS - Sent | Software Solutions, Inc. | \$3,000,000.00 | None |
| PO17-0000022 | Central Procurement Agency | 07/17/2017 | 2017 | Continuing Education Catering Contract | 3PS - Sent | Software Solutions, Inc. | \$0.00 | 2 |

[View more...](#)

Purchase Orders - Sent

| Purchase Order # | Organization | Purchase Order Date | Fiscal Year | Description | Status | Vendor Name | Total | Number of Change Orders |
|------------------|----------------------------|---------------------|-------------|---------------------------------------------|------------|--------------------------|----------------|-------------------------|
| PO17-0000038 | Central Procurement Agency | 12/04/2017 | 2017 | Contract for Hosting Services | 3PS - Sent | Software Solutions, Inc. | \$200,000.00 | None |
| PO17-0000037 | Central Procurement Agency | 10/24/2017 | 2017 | Contract for Dell computers for Police Dept | 3PS - Sent | Dermot Kennedy LLP | \$40,000.00 | None |
| PO17-0000036 | Central Procurement Agency | 10/03/2017 | 2017 | AntiVirus software | 3PS - Sent | Software Solutions, Inc. | \$97,388.00 | None |
| PO17-0000029 | Central Procurement Agency | 08/21/2017 | 2017 | Continuing Education Catering Contract | 3PS - Sent | Software Solutions, Inc. | \$3,000,000.00 | None |
| PO17-0000022 | Central Procurement Agency | 07/17/2017 | 2017 | Continuing Education Catering Contract | 3PS - Sent | Software Solutions, Inc. | \$0.00 | 2 |

[View more...](#)

Subcontractor Purchase Orders

| Purchase Order # | Organization | Purchase Order Date | Fiscal Year | Description | Status | Total | Number of Change Orders | Payments to Acknowledge | Date of Prime Last Payment | Payments to Prime |
|------------------|----------------------------|---------------------|-------------|------------------------------------------------------------------|-------------------------|-------------|-------------------------|-------------------------|----------------------------|-------------------|
| PO17-0000003 | Central Procurement Agency | 04/27/2017 | 2017 | Purchasing office supplies (printer paper, calculators, staples) | 3PS - Sent | \$11,683.35 | None | No | | \$0.00 |
| PO17-0000012 | Central Procurement Agency | 05/12/2017 | 2017 | Purchasing office supplies (printer paper, calculators, staples) | 3PCR - Complete Receipt | \$11,683.35 | None | No | | \$0.00 |



Step 2: Click the Purchase Order number

Purchase Orders / Change Orders (Un-Acknowledged)

| Purchase Order # | Organization | Purchase Order Date | Fiscal Year | Description | Status | Vendor Name | Total | Number of Change Orders |
|---------------------|----------------------------|---------------------|-------------|---------------------------------|------------|-------------------------|-------------|-------------------------|
| PO17-0000023 | Central Procurement Agency | 08/09/2017 | 2017 | Standing Desks for the Dev Team | 3P5 - Sent | Office Supply Solutions | \$11,250.00 | None |
| PO17-0000013 | Central Procurement Agency | 05/15/2017 | 2017 | 48 Month Copier Lease | 3P5 - Sent | Office Supply Solutions | \$10,029.60 | 1 |
| PO17-0000011 | Central Procurement Agency | 05/09/2017 | 2017 | Office Supplies Contract | 3P5 - Sent | Office Supply Solutions | \$5,133.65 | None |
| PO17-0000007 | Central Procurement Agency | 05/01/2017 | 2017 | Office Supplies Contract | 3P5 - Sent | Office Supply Solutions | \$5,133.65 | None |
| PO17-0000004 | Central Procurement Agency | 04/27/2017 | 2017 | Calculators for Office | 3P5 - Sent | Office Supply Solutions | \$2,599.00 | None |

If the Seller has not acknowledged the Purchase Order, then the user should select both checkboxes to acknowledge the Purchase Order and to notify the requestor and click Proceed.

Download Acknowledgement

I am acknowledging receipt of this purchase order.

Notify requestor of receipt of this purchase order.

 **Proceed** Cancel & Exit



Step 3: Click Create Invoice at the bottom of the screen of the Summary tab

Open Market Purchase Order PO17-0000023

General Items Attachments Notes Change Orders Subcontractors **Summary**

Header Information

| | | | | | |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------------------|
| Purchase Order Number: | PO17-0000023 | Release Number: | 0 | Short Description: | Standing Desks for the Dev Team |
| Status: | 3PS - Sent | Purchaser: | John Smith | Receipt Method: | Quantity |
| Fiscal Year: | 2017 | PO Type: | Open Market | Minor Status: | |
| Department: | 200COMM - Commodities | Location: | 00002 - Business Office - Region B | Type Code: | |
| Alternate ID: | | Entered Date: | 08/09/2017 02:10:45 PM | Control Code: | |
| Days ARO: | 0 | Retention %: | 0.00% | Discount %: | 0.00% |
| Required By Date: | | Promised Date: | | Actual Cost: | \$11,250.00 |
| Contact Instructions: | | Tax Rate: | | | |
| Ship-to Address: | Jane Doe Business Office Region B 433 E 1st Street San Antonio, TX 78212 US Email: test@periscopeholdings.com Phone: (555)555-5555 | Bill-to Address: | Jane Doe Business Office Region B 433 E 1st Street San Antonio, TX 78212 US Email: test@periscopeholdings.com Phone: (555)555-5555 | | |

Payments

There are no payments.

Invoice Information

There are no invoices.

Item Information

| Item # | Print Sequence | Item Description | Quantity | Unit Cost | Net Unit Cost | UOM | Total Discount Amt. | Tax Rate | Tax Amount | Freight | Total Cost |
|--------|----------------|-----------------------------|----------|-----------|---------------|-----------|---------------------|----------|------------|---------|-------------|
| 1 | 1.0 | (425 - 20) standing desks | 30.0 | \$375.00 | \$375.00 | EA - Each | | \$0.00 | \$0.00 | \$0.00 | \$11,250.00 |

2.3 General tab

The purpose of the General tab is to capture header level data for the Invoice template. Each Invoice template is blank when created from scratch. The Vendor completes the information and generates the Invoice number, which in combination with the Vendor number, is unique in the system. Some of the data is populated on the Invoice from the Purchase Order.

Step 1: Complete Required Fields

The Vendor must complete all required fields, marked with an asterisk (*), before saving the new document. The table below lists the required fields on the General tab, the description of the field, the functional implication in the system (if any) and the recommended usage.

| Field Name | Field Description | Field Implication | Common Usage |
|----------------|-------------------|----------------------------------------------------------------------|------------------------------------|
| Invoice number | Document number | Searchable in internal searches; Once saved, number cannot be edited | The Invoice Number from the Vendor |



| Field Name | Field Description | Field Implication | Common Usage |
|---------------------|-----------------------------------|---------------------------------|-----------------------------------------------------------------------------------------------------------------|
| Invoice Description | Title of the document | Searchable in internal searches | Description of the goods or services that the Agency is paying the Vendor for; should be descriptive and unique |
| Invoice Date | Pre-populates to the current date | Informational | Audit Trail, Reporting |

Step 2: Click Save & Continue

Once the Vendor saves the document, protected fields are auto-filled by the system, and the document is now searchable in the system by authorized users, including from the Vendor's Homepage.

The table below shows the fields that are auto-populated and that cannot be edited. The table lists the protected fields, the description of the field, the functional implication in the system (if any) and the recommended usage.

| Field Name | Field Description | Field Implication | Common Usage |
|-------------------|---------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|------------------------|
| Invoice Status | Initial status is set to In Progress & will update after an AP user submits the Invoice | Identifies where the document is in the process and if the document is editable | N/A |
| Payment Amount | Total amount of the Invoice | Will update depending on the amount entered on the Items tab of the Invoice | Audit Trail, Reporting |
| Payment Terms | Defaulted from the Vendor; can be edited (Note: payment terms are established by the State of NJ) | Applies to the Total Amount | Audit Trail, Reporting |
| Payment Discount | Defaulted from the Vendor | Applies to the Total Amount | Audit Trail, Reporting |
| Payment Terms Day | Defaulted from the Purchase Order | Applies to the Total Amount | Audit Trail, Reporting |
| Entered By | Defaulted from the Seller account entering the Invoice | Informational | Audit Trail, Reporting |



| Field Name | Field Description | Field Implication | Common Usage |
|-------------------|--------------------------------------------|-------------------------------------------------------|------------------------|
| Entered Date | Defaulted from date the Invoice is created | Informational | Audit Trail, Reporting |
| Credit Amount | Defaulted to "\$0.00" | Total Amount will update after Credit Memo is applied | Audit Trail, Reporting |
| Last User Updated | Automatically generated | Informational | Audit Trail, Reporting |
| Last Date Updated | Automatically generated | Informational | Audit Trail, Reporting |

Step 3: Complete Optional Fields as preferred

| Field Name | Field Description | Field Implication | Common Usage |
|----------------|-----------------------|---------------------------------------------------|------------------------|
| Freight Amount | Defaulted to "\$0.00" | Total Amount will update after Freight is applied | Audit Trail, Reporting |

Note: The address shown in the Vendor Remit-to Address field must not be changed by the vendor.



Step 4: Click Save & Continue

Step 5: Click Items tab

Invoice #: INV123 Vendor #:V00000013 Vendor Group #:01

General **Items** Attachments Notes Summary **Back to PO**

Invoice number: **INV123** Invoice Status: 4IIV - Vendor In Progress

Invoice Description *: Vendor Invoice

Invoice Date *(MM/DD/YYYY): 04/27/2018

Payment Amount: \$100.00

Paid-BankId/CheckNbr:

Payment Terms: Payment Discount: 0.0 %

Payment Terms Day: 0 Freight Amount: 0.0

Entered By: Brodie Ramirez

Entered Date: 04/27/2018 Credit Amount: \$0.00

Last User Updated: Brodie Ramirez Last Date Updated: 06/11/2018

Purchase Order Information

PO #: PO17-0000026 PO Description: Standing Desks for the Dev Team

Buyer: John Smith

PO Amount: \$11,250.00 Remaining To Invoice: \$11,250.00

Vendor Information

Vendor : V00000013 - Office Supply Solutions Address Grp: 01

Tax ID #: *****8789 Vendor Remit-to Address: General Mailing Address - Brodie Ramirez 123 23rd Street Boston, ...

Remit Text:

Brodie Ramirez
123 23rd Street
Boston, MA 45643
US
Email: dawaimrin@periscopeholdings.com
Phone: (555)888-4444

Save & Continue

2.4 Items tab

The purpose of the Items tab is to show all items and quantities that may be paid.

Step 1: Enter the Invoice Amount

The Vendor can enter the amount for each Item on the Invoice.

Step 2: Click Save & Continue



2.5 Attachments tab

Step 1: Click Attachments tab

Invoice #: INV123 Vendor #:V00000013 Vendor Group #:01

General **Items** Attachments Notes Summary [Back to PO](#)

| Invoice Item #/ PO Item # | Item Description | PO Item Status | PO Item Amount | Previous Invoice Amount | Invoice Amount | Discount% | Original Pay Amount |
|------------------------------|------------------------------------------|-------------------|-------------------|----------------------------|-------------------|-----------|------------------------|
| 1 | standing desks 3PPR - Partial Receipt | | \$11,250.00 | \$0.00 | 100.00 | 0.0% | \$0.00 |

Invoice Amount Total: \$100.00

[Save & Continue](#)

Step 2: Click Add File

General **Items** Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

General Address Accounting **Attachments** Notes Questions

Files

*Click **Add File** to add file attachments.*

No File Attachments

[Add File](#) [Cancel & Exit](#)

Step 3: Click Choose File

The user clicks Choose File to upload a file from the user's computer.

Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name*:

Description:

File*: [Choose File](#) No file chosen

[Search File](#)

Location: agency

[Save & Exit](#) [Save & Continue](#) [Reset](#) [Cancel & Exit](#)



Step 4: Select the file

Step 5: Complete the fields

The user may update the Name for the attachment, and enter a description.

Step 6: Click Save & Exit

The user may click Cancel & Exit to cancel any changes and to return to the previous screen. The user may also click Save & Continue to save the current attachment and upload a new attachment.

| | | | |
|--------------|------------------------|------------------------|------------------------|
| Name*: | T&C Attachment | | |
| Description: | Terms and Conditions | | |
| File: | blank attach~7.docx | | |
| Location: | agency | | |
| Size: | 12,495 bytes | Last Modified On Disk: | 06/05/2017 02:31:36 PM |
| Uploaded: | 06/05/2017 02:31:36 PM | Uploaded By: | John Smith |

Save & Exit Save & Continue Reset Cancel & Exit

2.6 Notes tab

The purpose of the Notes tab is to capture notes applicable for items listed on the Invoice. The Accounts Payable user processing the Invoice will see these notes.

2.7 Summary tab

The Summary tab provides an overview of all the information provided by the Vendor on the previous tabs for review prior to submitting the document to the Accounts Payable user for review and processing. Once the document is submitted, the Vendor cannot edit the document.

Note: Only invoices that are still in progress and have not yet been submitted to an agency can be canceled by the vendor.

Step 1: Review information

Step 2: Click Submit

After the Vendor submits the Invoice, the status of the Invoice will remain In Progress (see next page).

The Accounts Payable user at a State agency will be able to complete the Invoice and submit for approval.



General Items Attachments Notes Summary Back to PO

Header Information

| | | | |
|------------------------------|-----------------------|---------------------------|---------------------------|
| Invoice number: | 5467ABN | Invoice Status: | 4IIV - Vendor In Progress |
| Invoice Description: | Invoice for September | Invoice Date: | 06/12/2018 |
| Payment Amount: | \$15,094.00 | Payment Discount: | 0.0% |
| Payment Terms: | Net 30 | Payment Terms Day: | 30 |
| Paid-BankId/CheckNbr: | | Freight Amount: | 0.0 |
| Entered By: | Brodie Ramirez | Entered Date: | 06/12/2018 |
| Credit Amount: | \$0.00 | Last Date Updated: | 06/12/2018 |
| Last User Updated: | Brodie Ramirez | | |

Attachments

Agency Files:
Agency Forms:
Vendor Files:
Vendor Forms:

Purchase Order Information

| | | | | | |
|-------------------|----------------|------------------------------|---------------------------------------------------------|---------------|----------------|
| PO #: | PO17-0000001:1 | PO Description: | Construction Materials Observation and Testing Services | Buyer: | Phyllis Taylor |
| PO Amount: | \$23,842.00 | Remaining To Invoice: | \$23,842.00 | | |

Vendor Information

| | | | | | |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------|-----------------------|----------|--------------------|--|
| Vendor: | V00000013 - Office Supply Solutions | Address Group: | 01 | Remit Text: | |
| Vendor Remit-to Address: | Brodie Ramirez 123 23rd Street Boston, MA 45643 US Email: dawainrin@periscopeholdings.com Phone: (555)888-4444 | Tax ID #: | ****8789 | | |

Item Information

Invoice Item #/PO Item #: 1 Training Session "The Safe Transport of Hazardous Materials" DOT (24 Hours) This course is intended for personnel who prepare hazardous materials for transportation (i.e. classification, marking, labeling, packaging, preparing paperwork). It will be inclusive of the most recent final rules published by the US Dept. of Transportation (DOT) Pipeline and Hazardous material Safety Administration. Mode of transportation addressed will include ground (road/rail).

| PO Item Status | Invoice Amount | Discount % | Original Pay Amount |
|----------------|----------------|------------|---------------------|
| 3PS - Sent | \$15,000.00 | 0.0% | \$0.00 |

Invoice Item #/PO Item #: 2 Student Materials and Appropriate Ground Regulations (49CFR's); the published regulations used in this course will be approved by the Agency prior to course scheduling. Vendor will use Code of Federal Regulations, published by LabelMasterX.

| PO Item Status | Invoice Amount | Discount % | Original Pay Amount |
|----------------|----------------|------------|---------------------|
| 3PS - Sent | \$94.00 | 0.0% | \$0.00 |