



Use these steps to upload an invoice to a PO as a campus user. This step should be used if a supplier emails an invoice to their campus contact instead of uploading it directly to P2P using the supplier portal.

Upload an Invoice to a PO as a Campus User

1. Open the purchase order that you want to add the invoice(s) to.
2. Upload the invoice(s) as internal attachments. **Note:** if you are uploading multiple invoices, please upload each one as a separate attachment.
3. Go to the **Comments** tab and click the **+** icon to create a new comment.

Purchase Order • The Visibility Company • 2400008865

The screenshot shows a navigation bar with tabs: Status, Summary, Confirmations, Shipments, Receipts, Vouchers, **Comments** (highlighted with a red box), Attachments 1, and History. Below the tabs, there is a section for comments. It shows 'Records found: 0' and 'No comments have been added'. On the right, there is a 'Show comments for' dropdown menu with 'Purchase Order' selected and a '+' icon (highlighted with a red box) to add a new comment.

4. Add Bethany Davis and Melissa Henriquez as recipients.

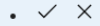
If the recipient you want to add is listed in the automatic recipients, click the checkbox next to their name to select them.

The 'ADD COMMENT' dialog box has a text area on the left with '1000 characters remaining' and 'expand | clear' options. On the right, there is a list of recipients with checkboxes. The first recipient is 'Bethany Marie Davis <bdavis33@csub.edu>' with a checked checkbox (highlighted with a red box). Other recipients include 'Andrea Weikel (Requisition prepared by) <aweikel@csub.edu>' and 'Tamar Sherice Anthony (Prepared for) <tanthony@csub.edu>'. Below the list is an 'Attach file (optional)' option. A note at the top right says 'This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.'

If the recipient you want to add is not listed, click **Add recipient**. This will open a search window.



ADD COMMENT



1000 characters remaining

expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) **Add recipient**

Bailey Rachelle Freckleton (Prepared by, Prepared for) <bsmith44@csub.edu>

Attach file (optional)

Enter the recipient's first or last name and click **Search**.

User Search

Last Name

First Name

User Name

Email

Business Unit

Role

Results Per Page

Search Close

Select the recipient by clicking the + icon to the far right of their name. This will return you to the Add Comment screen.

User Search

New Search

Name ↑	User Name	Email	Phone	Action
Henriquez, Melissa Ana	35000135063	mhenriquez1@csub.edu		+

Close



5. Type your message in the comment box.

Note: if you are uploading invoices to a blanket PO, please include the upload date and number of invoices in your comment. E.g., “uploaded five invoices 8/2/2024.”

ADD COMMENT

Type comment here

983 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

This will add a comment to the document. If you select a user they will be added to the document.

Email notification(s) | Add recipient

- Andrea Weikel (Requisition prepared by) <aweikel@csub.edu>
- Bethany Marie Davis <bdavis33@csub.edu>
- Tamar Sherice Anthony (Prepared for) <tanthony@csub.edu>
- Henriquez, Melissa Ana <mhenriquez1@csub.edu>

Attach file (optional)

6. When you are finished, click the ✓ icon in the top right corner to post the comment.

ADD COMMENT ✓ ✕

Type comment here

983 characters remaining expand | clear

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Email notification(s) | Add recipient

- Andrea Weikel (Requisition prepared by) <aweikel@csub.edu>
- Bethany Marie Davis <bdavis33@csub.edu>
- Tamar Sherice Anthony (Prepared for) <tanthony@csub.edu>
- Henriquez, Melissa Ana <mhenriquez1@csub.edu>

Attach file (optional)

Attachment Type

- File
- Link/URL

File Name

File Choose File Upload your file