Ohio | Buys

How to Create an Invoice from a Purchase Order

Step-by-Step Instructions for Creating an Invoice from a Purchase Order

1 Log in to Ohio|Buys. From any page in Ohio|Buys, go to the main menu navigation bar, click on **Orders**, and then select **Acknowledge Orders.**

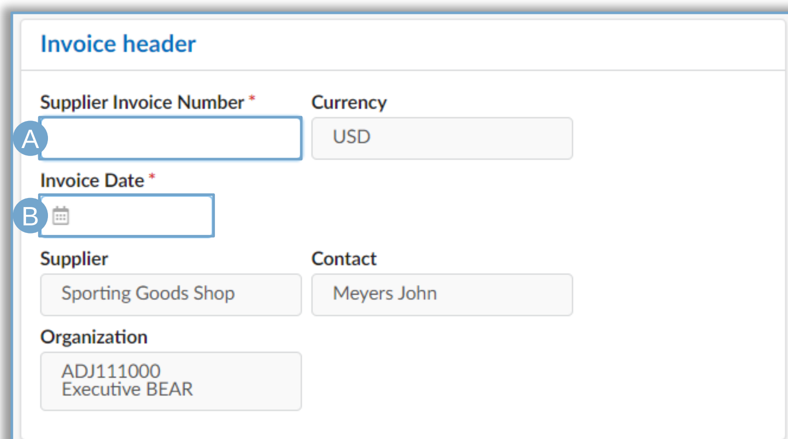
2 From the Acknowledge Orders page, you can search for orders by **Keyword**. You can also conduct an advanced search by clicking on the **Filter** ( ) icon where you can search by a range of order dates, delivery dates, and/or order values.

3 Once you have found the purchase order that you want to flip into an invoice, click the **Pencil** ( ) icon to open the order. Click **Create Invoice** to generate an invoice from the PO.

4 A draft invoice will be created. You will need to complete the **Invoice Header** section by adding the following information:

a) **Supplier Invoice Number** is the internal naming convention at your organization for this invoice.

b) **Invoice Date** is the date the invoice was issued.



Other information from the PO, such as the **Contract**, **Order**, **Supplier**, **Payment Type,** and **Payment Terms** will carry over to the draft invoice automatically. The Invoice will auto-populate as much information as possible based on the available information in the original PO.

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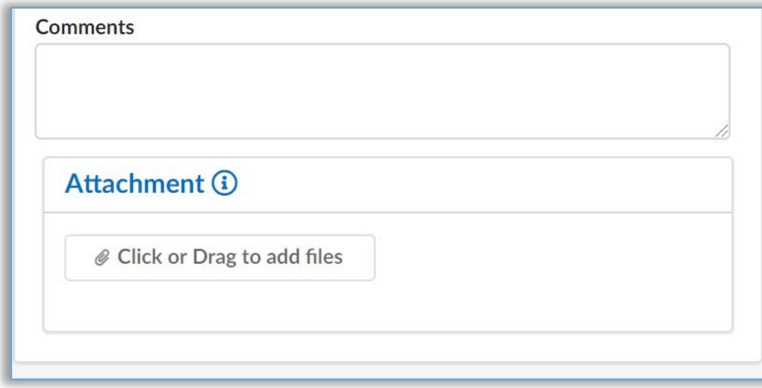

c) **Comments** is where additional details about this invoice can be entered.

d) **Attachments** is where supplemental documentation can be added for this invoice. This is not the main invoice, but supplemental documentation to justify the information and line items in the main invoice. Examples include an itemized listing of deliveries or services performed, an itemization of materials used, or labor furnished, or the sum due per the contract.

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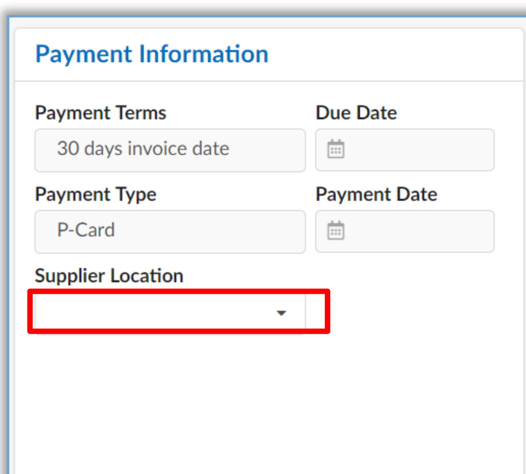
Under the Payment Information Section, select a **Supplier Location**. This determines how the State will deliver payment for the invoice.



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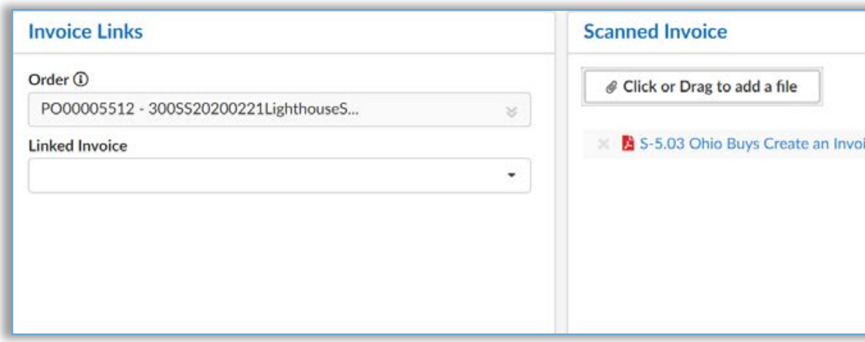
Under the Scanned Invoice section, attach the main invoice in PDF format by clicking **Click or Drag to add a file**.



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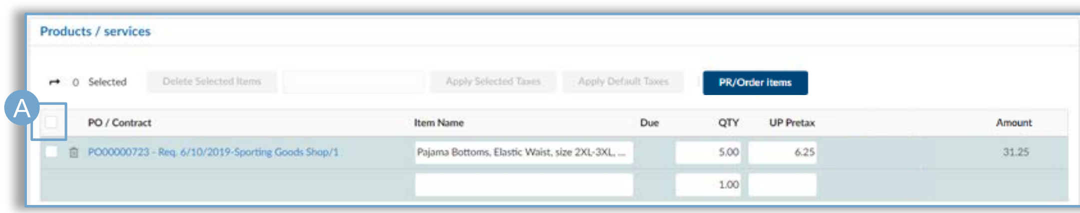
Add the **Line Items** from the PO that you want to include on this invoice by clicking the check boxes to their left. You can manually update quantities (**QTY**) and apply taxes as needed.



a) Click the top check box to automatically include all line items from the original PO in the invoice.

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Once you have completed the mandatory fields and selected all of the appropriate line items for this invoice, click **Validate** and then click **OK** on the confirmation pop-up message.

Click **Submit** to send it to the State for approval and payment.

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The status of your invoice will change upon submission. Each status represents a different step in the invoice approval process:

- **Draft:** This status is assigned to the invoice while it is being created and prior to it being submitted for review by the State.
- **Approval in Progress:** This status is assigned to the invoice while it is being reviewed by the State.
- **Approved:** This status is assigned to the invoice after it is fully approved by the State. An invoice in an approved status does not mean that the payment is being processed. Instead, it indicates that the payment related to this invoice is in queue to be remitted according to the contract's payment terms.