

Quick Reference Guide Upload an Invoice to a PO



Use these steps to upload an invoice to a PO as a campus user.

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. Go to the **Comments** tab and click the + icon to create a new comment.

Purchase Order • The Visibility Company • 2400008865										
Stati	us	Summary	Confirmations	Shipments	Receipts	Vouchers	Comments	Attachments 1	History	
Re	Records found: 0 Show comments for Purchase Order +									
No	No comments have been added									

3. Add Bethany Davis and Tina Livingston as recipients.

If the recipient you want to add is listed to the right of the comment box, click the checkbox next to their name to select them.

ADD COMMENT	✓ X
a 1000 characters remaining expand clear Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is	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 Andrea Weikel (Requisition prepared by) <aweikel@csub.edu> Bethany Marie Davis <bdavis33@csub.edu> Tamar Sherice Anthony (Prepared for) <tanthony@csub.edu></tanthony@csub.edu></bdavis33@csub.edu></aweikel@csub.edu>
attached, it is accessible from the History tab of the document.	Attach file (optional)

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)</bsmith44@csub.edu>



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Enter the recipient's name and click Search.

User Search		\times
Last Name 🌖	livingston	
First Name 🕤		
User Name 🕠		
Email 🔒		
Business 🔹 🚺 Unit	CSUB P2P (BKXMP)	
Role 🕕	~	
Results Per Page	10 🗸	
	Search	ose

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 个	User Name	Email	Phone	Action
Livingston, Chris	3500007728	clivingston@csub.edu		+
Livingston, Tina T	35000017543	tlivingston@csub.edu		+
				Close



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- 4. Type your message in the comment box.
- 5. Click **Choose File** to upload the invoice.

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 docum been added to the document. Email notification(s) Add recipient Bethany Marie Davis <bdavis33(Deborah La Febre (Prepared by, Horacio Gonzalez <hgonzalez37 Livingston, Tina T <tlivingston@u Attach file (optional) Attachment Type</tlivingston@u </hgonzalez37 </bdavis33(to the document. If you select a user they will receive an email indicating that a comment has tent. d recipient s <bdavis33@csub.edu> >repared by, Prepared for) <dlafebre@csub.edu> (Inactive) hgonzalez37@csub.edu> tivingston@csub.edu> © File</dlafebre@csub.edu></bdavis33@csub.edu>		
	File Name File	Choose File Upload your file		

6. Select the file you want to upload and click the \checkmark icon in the top right corner to post the comment.

ADD COMMENT		×		
Type comment here	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			
	🧹 Bethany Marie Davis <bdavis33@< td=""><td>icsub.edu></td></bdavis33@<>	icsub.edu>		
983 characters remaining expand 1 clear	Deborah La Febre (Prepared by, P	repared for) <dlafebre@csub.edu> (Inactive)</dlafebre@csub.edu>		
Characters beyond the limit are not saved i.e., the note is truncated. Once the note is	Horacio Gonzalez <hgonzalez37@csub.edu></hgonzalez37@csub.edu>			
attached, it is accessible from the History tab of the document.	Livingston Ting T atlivingston@csub edus			
	Attach file (optional)			
	Attachment Type	File		
		O Link/URL		
	File Name			
	File	Choose File Invoice.pdf		

Note: if you are uploading multiple invoices, please upload each invoice in a separate comment.