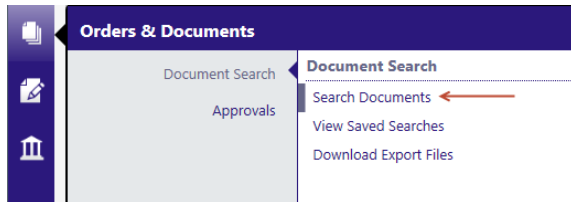# Creating an Invoice in the PantherExpress System

Invoices should ONLY be created for the following forms: Conference and Hotel Agreement, Services Agreement, Research Subcontracts, and Supplier Provided Agreements

1. **Find the PO** for which you wish to create an invoice. Go to the Orders and Documents menu and click on Search Documents.

2. Find the PO for which you wish to create the invoice by entering the order #, or searching by a date range. Click **Go**.

3. **Click on the PO #** to open the document.

4. From the **Available Actions** dropdown menu, select **Create Invoice**, and click **Go**.
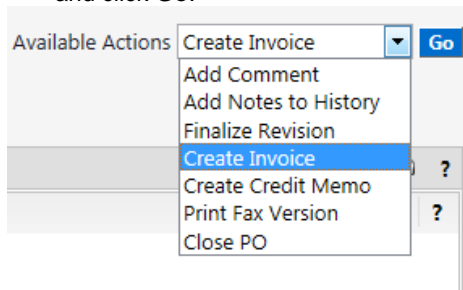

5. In the **Simple Manual Entry screen enter the following**:

   a. Invoice Date (if available). If an invoice date is not on the invoice, use the date that you are creating the invoice.

   b. Supplier Invoice Number. If a supplier invoice number is not available, use the date the contract was signed or the date the event occurred.

   c. Remit To Address. If the address where the payment should be sent is not the correct one, use the dropdown menu to select the correct address. If the correct Remit-To address is not in the dropdown menu, contact Payment Processing with a copy of the invoice to have the address added.

   d. Line Items. **Review the PO line item information, and attach a copy of the invoice**

   - If a line item is present that is not to be paid on the invoice, delete the line.

   - If the unit price is incorrect, change it to the amount that is to be paid for that invoice and click **Save**.

   - **Attach a copy of the invoice.** Click on the Comments Tab. Click "Add Comment". Enter the comment, "See attached invoice". Attach the PDF file you created from the supplier paper invoice by clicking on Browse, selecting the fil, and clicking Open. Click Add Comment. To see your attached copy of the paper invoice, click on the Attachments tab.

6. **If you need to change the account number to which invoices will be charged,** click on the Buyer Invoice tab, scroll till you can see the Charge Account, and click Edit. Edit the Account Code segments and click Save.

7. **When all of the above steps have been completed**, scroll to the top of the form and **click Complete**.
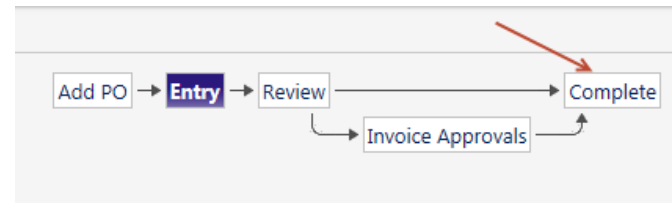
8. Once the invoice has been completed, this will go to Payment Processing for review and approval of the payment.

Note: The invoice total cannot be greater than the Specialty Form total. **If you need to modify the Specialty Form dollar amount**, do the following:

   a. Find the PO, using Document Search
   b. Click on the PO #
   c. Click on the Form link at the Line Item level to open the Specialty Form
   d. Edit the Service Provider's Fee amount
   e. Go to Available Actions at the top of the screen, select Save, and Go. Then close the form.
   f. Under General Information, there will be a message that the PO contains edits
   g. Go to Available Actions at the top of the screen, select Finalize Revision, and Go, to submit the document for reapproval.

To Get Help contact PantherExpress Customer Service at 412-624-3578.