



Payment Academy: Invoices in CU Marketplace

We'll get started soon...

Do you hear music playing?
If not, take a moment to adjust your audio settings.

PAYMENT ACADEMY: INVOICES IN CU MARKETPLACE

PRESENTED BY

KRISTINA MENDEZ

Finance & Procurement
Learning Specialist



EMILY HAWKINS

Help Desk
Training Consultant



A close-up photograph of several interlocking puzzle pieces made of a light-colored, textured material, possibly cardboard or paper. The pieces are scattered on a vibrant yellow background. The lighting creates soft shadows, emphasizing the three-dimensional nature of the puzzle pieces. A white rectangular box is superimposed over the center of the image, containing the text 'WHY ARE WE HERE?'.

WHY ARE WE HERE?

Handout:
<https://tinyurl.com/cu-marketplace>

AGENDA

TECHNICAL STUFF

Q&A Button
Poll Questions
CPE Reminders

INVOICES

Invoice requirements
Submitting Invoices

PAYMENT STATUS

Looking Up Invoices
Understanding Payment Status

RESOLVING ISSUES

Troubleshooting Tips for
“In Process” Invoices

RESOURCES

Payment Resource Center
Recording, Handout, & Slides



Handout:
<https://tinyurl.com/cu-marketplace>



WE WILL SHARE A
RECORDING

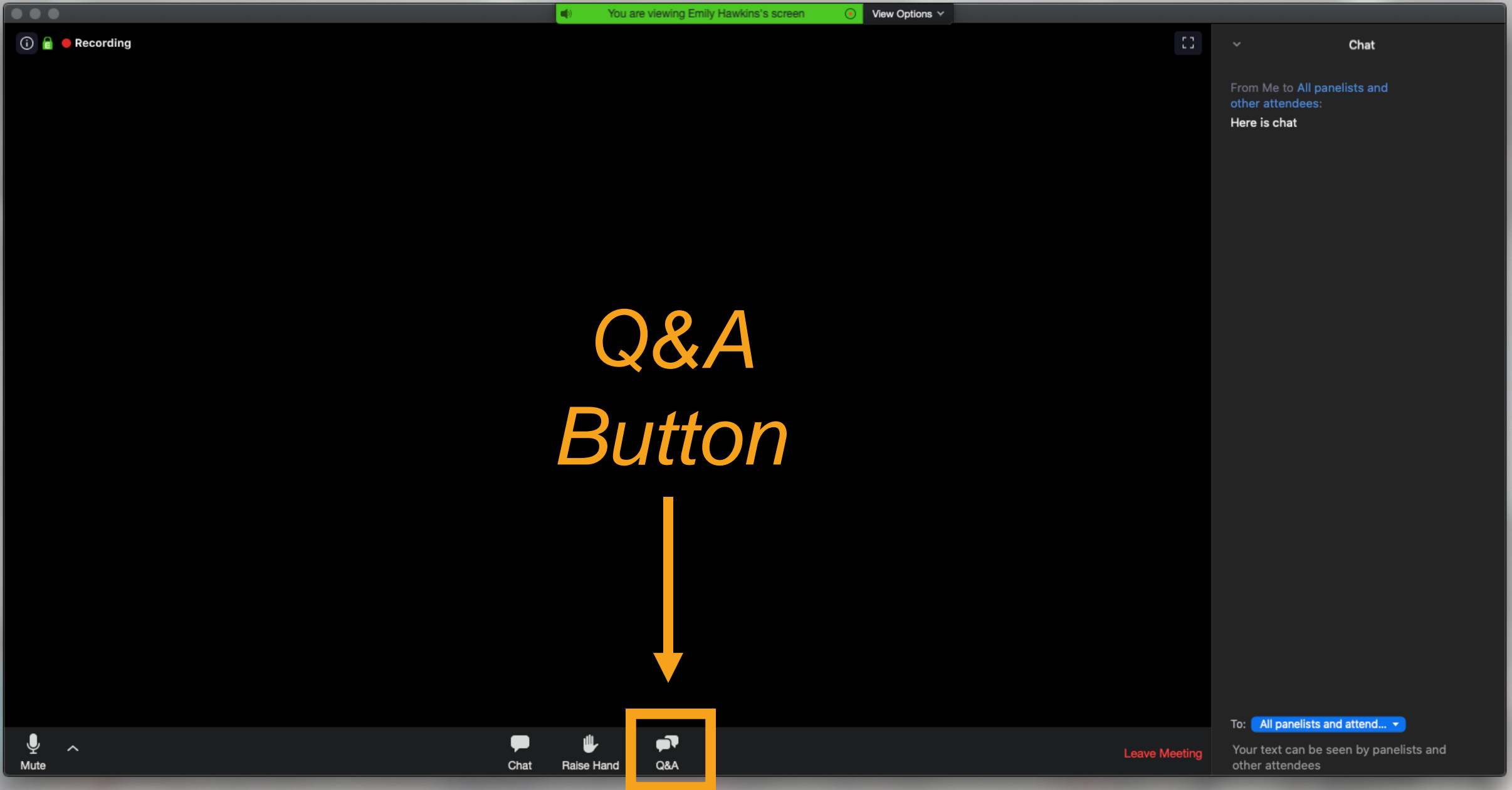
(after the webinar)



CPE Reminder

cu.cpe@cu.edu

Q&A Button



WE WILL HAVE SOME
POLL QUESTIONS

(let's try one now)



POLL QUESTION #1

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INVOICES IN CU MARKETPLACE



TIPS FOR PROCESSING INVOICES

WHAT'S IN AN INVOICE?

Ok to pay with PO# 1001255224
By Erika Herrera

Erika Herrera



INVOICE

Chris Yankee 113191

DATE: NOVEMBER 4, 2019

Robin Truesdale, RT Editing
1711 W Barberry Cir.
Louisville CO 80027
303-594-5048
robin.truesdale@comcast.net

TO Chris Yankee
Director, Research Communications
Research & Innovation Office
University of Colorado Boulder
Boulder, Colorado 80303
303 735 9092

QTY	DESCRIPTION	UNIT PRICE	LINE TOTAL
2	Rehearsals, Filming & Editing example videos	300	300.00
1	Event Filming 10/15/2019	350	350.00
7	Completed Videos	180	1260.00
1	Seagate 2TB Hard Drive	80.00	80.00
		TOTAL	1990.00

Delivery via online file transfer plus all media and hard copies of video files on HD.

WHAT'S IN AN INVOICE?

Ok to pay with PO# 1001255224
By Erika Herreria

Erika Herreria



INVOICE

Chris Yankee 113191

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QTY	DESCRIPTION	UNIT PRICE	LINE TOTAL
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1	Event Filming 10/15/2019	350	350.00
7	Completed Videos	180	1260.00
1	Seagate 2TB Hard Drive	80.00	80.00
TOTAL			1990.00



TIPS FOR SUBMITTING INVOICES

POLL QUESTION #2

AGENDA

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PAYMENT RESOURCE CENTER

[https://www.cu.edu/psc/training/
payment-resource-center](https://www.cu.edu/psc/training/payment-resource-center)

Payment Resource Center

Learn how to look up payment status for invoices, reimbursements, and study subjects -- using CU Marketplace, the Finance System, Concur, and CU-Data.

Need access to these systems? Check out our [Access and Training Requirements guide](#).

Looking Up Invoices Processed in CU Marketplace



[Looking Up Invoices](#)

Look up invoices (vouchers) in CU Marketplace to see payment status and invoice images.

Looking Up Payments Processed on Paper Forms



[Looking Up PA and NRI Forms](#)

Look up payments processed on the Payment Authorization (PA) and Non-Employee Reimbursement - International (NRI) forms using the Finance System.

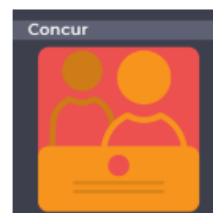


[Looking Up Study Subject Payments](#)

Look up payments processed on the Study Subject Payment (SSP) form using CU-Data.

Looking Up Reimbursements Processed in Concur

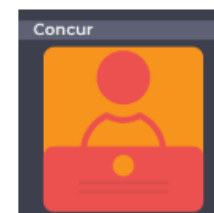
Reimbursements to Non-Employees



[Looking Up Non-Employee Reimbursements](#)

Look up non-employee reimbursements in Concur if you processed the reimbursement and just want to know if it has paid.

Reimbursements to Employees



[Looking Up Employee Reimbursements](#)

Look up employee reimbursements in Concur if you are the report owner, their delegate or their approver.

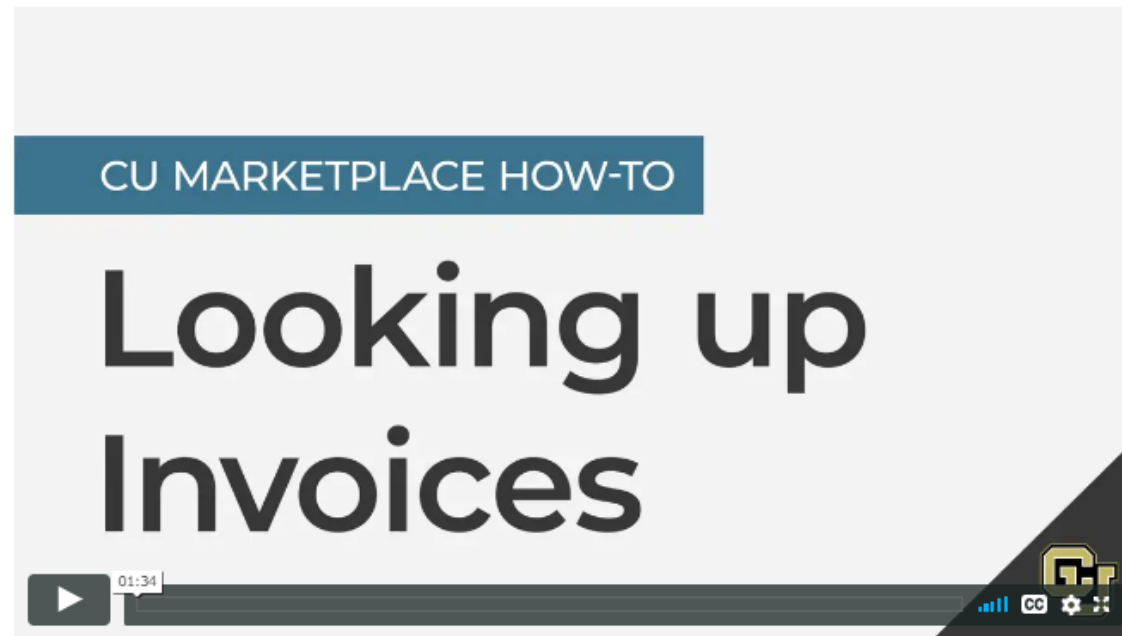
Looking Up Invoices

CU Marketplace How-to: Looking Up Invoices

You can look up invoices (vouchers) in CU Marketplace to see payment status and invoice images.

Note: When an invoice is entered into CU Marketplace, it becomes a voucher. A Payment Voucher (PV) created in CU Marketplace also becomes a voucher after approval occurs.

Watch the video



Read the Procedures

Troubleshooting

1. Locate the *Quick Search* box, located in the ribbon at the top of the screen. Use the dropdown to select **All**.
2. There are many ways to look up an invoice. We recommend you look it up by the Purchase Order number.
Note: If you're looking up a Payment Voucher, you may want to search by Requisition or Voucher number.

RELATED LINKS

- [Viewing Invoice Images](#)
- [CU Marketplace How-to: Voucher Information](#)
- [Transactions on Your Financial Statements](#)

NEED HELP?

Finance & Procurement Help Desk

- Email: FinProHelp@cu.edu
- Voice: 303.837.2161
- Manager: [Leslie Nittoli](#)

Finance & Procurement Help Chat

The background of the image features three vertical traffic lights. The top row of lights is red, the middle row is yellow, and the bottom row is green. The middle traffic light, which is yellow, is the central focus and has a bright glow around it. A white rectangular box is superimposed over the middle traffic light, containing the text 'UNDERSTANDING PAYMENT STATUS'.

UNDERSTANDING PAYMENT STATUS

PAID

Number	S2354821	Supplier Account No.	Available Actions	Add Comment	Go
Invoice No.	22537172				
Name	Medeco Security Locks Inc				

Invoice

Approvals

Matching

Comments

Supplier Messages

Attachments (1)

History

Summary

General

Payment Information

Discount, Tax, Shipping & Handling

Codes

Hide header

Hide value descriptions

General	Addresses	Payment Status Information
Workflow Status ✓ Completed (5/14/2020 11:40 AM)	Remit To P O Box 740914 Atlanta, GA 30374-0914	Accounting Date 5/15/2020 Export Date 5/14/2020 11:40 AM Paid/Cancelled Date 5/15/2020 Pay Status Paid Payment Method ACH Check No. 1000082168
Vendor Name Medeco Security Locks Inc more info...	United States Phone 1-800-8393157- Fax 1-540-3801612- Address Id 3 3rd Party Address ID 2015-10-23p5865067	
Voucher Type Invoice		
Voucher Number S2354821		
Vendor Invoice No. 22537172		
Vendor Invoice Date 5/5/2020		
Discount Date <i>no value</i>		
Due Date 5/15/2020		
Terms 0% 0, Net 10		
Terms Discount 0.00 USD		

Payment Information	Note/Attachments
1099 Indication 1099 Code <i>no value</i> 1099 Indicator *****	Notes From <i>no note</i> Vendor/Payment Status Update Internal Note <i>no note</i>

Handout:

<https://tinyurl.com/cu-marketplace>

PAYABLE

Invoice Number	S2355759	Supplier Account No.	Available Actions	Add Comment	Go
Invoice No.	10393540794				
Vendor Name	Dell Marketing LP				

Invoice

Approvals

Matching

Comments

Supplier Messages

Attachments

History

Summary

General

Payment Information

Discount, Tax, Shipping & Handling

Codes

Hide header

Hide value desc

General		Addresses		Payment Status Information	
Workflow Status	✓ Completed (5/16/2020 2:25 PM)	Remit To		Accounting Date	5/16/2020
Vendor Name	Dell Marketing LP	PO Box 802816		Export Date	5/16/2020 2:25 PM
	more info...	Chicago, IL 60680-2816		Paid/Cancelled Date	no value
Voucher Type	Invoice	United States		Pay Status	Payable
Voucher Number	S2355759	Address Id 14		Payment Method	Unknown
Vendor Invoice No.	10393540794	3rd Party Address ID 14		Check No.	no value

Payment Information		Note/Attachments	
1099 Indication		Notes From	A State Environmental
1099 Code	no value	Vendor/Payment Status	will be applied to invo
1099 Indicator	*****	Update	when applicable. Charg
			referenced as a ...
			more...

Handout:

<https://tinyurl.com/cu-marketplace>

IN
PROCESS

Invoice Number	S2348932	Supplier Account No.	Available Actions	Add Comment	Go
Invoice No.	9080084844				
Vendor Name	One Lambda Inc				

Buyer Invoice Approvals Matching Comments Supplier Messages Attachments (5) History

Summary General Payment Information Discount, Tax, Shipping & Handling Codes

Hide header Hide value descriptions

General	Addresses	Payment Status Information
<div>Workflow Status Pending SPO Voucher Approval</div> <div>Vendor Name One Lambda Inc more info...</div> <div>Voucher Type Invoice</div> <div>Voucher Number S2348932</div> <div>Vendor Invoice No. 9080084844</div> <div>Vendor Invoice Date 4/16/2020</div> <div>Discount Date no value</div> <div>Due Date 4/26/2020</div> <div>Terms 0% 0 Net 10</div>	<div>Remit To</div> <div>PO Box 844749 Dallas, TX 75284-4749</div> <div>United States Address Id 4 3rd Party Address ID 2016-01-15p6454432</div>	<div>Accounting Date 4/30/2020</div> <div>Paid/Cancelled Date no value</div> <div>Pay Status In Process</div> <div>Payment Method Unknown</div> <div>Check No. no value</div>
	<div>Payment Information</div> <div>1099 Indication</div> <div>1099 Code no value</div> <div>1099 Indicator *****</div>	<div>Note/Attachments</div> <div>Notes From no note</div> <div>Vendor/Payment Status Update</div>

Handout:

<https://tinyurl.com/cu-marketplace>

POLL QUESTION #3



Orders ▶ Search ▶ [Search Documents](#) ▶ Summary - Supplier Invoice No. 3446918697 (Doc. No. S2354609)

Voucher Number	S2354609	Supplier Account No.	Available Actions	Add Comment ▼	Go
Vendor Invoice No.	3446918697				
Vendor Name	Staples Contract & Commercial Inc				

Buyer Invoice	Approvals	Matching	Comments	Supplier Messages	Attachments	History
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Summary	General	Payment Information	Discount, Tax, Shipping & Handling	Codes	?
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[Hide header](#) [Hide value descriptions](#)

General		Addresses	Payment Status Information
Workflow Status	✓ Completed (5/14/2020 4:34 AM)	Remit To PO Box 71217 Chicago, IL 60694-1217	Accounting Date 5/15/2020 Export Date 5/14/2020 4:34 AM Paid/Cancelled Date 5/15/2020 Pay Status Paid Payment Method ACH Check No. 1000082183
Vendor Name	Staples Contract & Commercial Inc   more info...	United States Address Id 6 3rd Party Address ID 2014-08-12p2067849	
Voucher Type	Invoice		
Voucher Number	S2354609		
Vendor Invoice No.	3446918697		
		Payment Information	Note/Attachments
Vendor Invoice Date	5/14/2020	1099 Indication	Notes From <i>no note</i>
Discount Date	<i>no value</i>	1099 Code <i>no value</i>	Vendor/Payment Status Update
Due Date	5/14/2020	1099 Indicator *****	Internal Note <i>no note</i>
Terms	0% 0, Net 0		

POLL QUESTION #4

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TROUBLESHOOTING TIPS FOR INVOICES

TIP 1 – REVIEW THE COMMENTS

Voucher Number **S2293936**
Vendor Invoice No. **G2890602**
Vendor Name **HireRight Inc**

Supplier Account No.

Available Actions **Add Comment** 



[Buyer Invoice](#) [Approvals](#) [Matching](#) **Comments (1)** [Supplier Messages](#) [Attachments \(2\)](#) [History](#)

Add Comment

Show comments for **Invoice**

Records Found: 1

Gloria Chavez [\[Reply To\]](#) [\[New Comment\]](#)

Applies To: Invoice **S2293936**

Comment Added - 2/12/2020 5:33 PM

Cindy, I could not process the spo allocation form because the amount on the form did not match the invoice. Please correct this and don't approve it until I let you know that I have updated the allocation information, Thanks.

Email sent: Cynthia Subia <CINDY.SUBIA@CUANSCHUTZ.EDU>

TIP 1 – REVIEW THE COMMENTS

Voucher Number S22939
Vendor Invoice No. G2890
Vendor Name HireRight

Buyer Invoice Approvals Match

Add Comment

Show comments for Invoice

Records Found: 1

Gloria Chavez [Reply To] [New]
Applies To: Invoice - S2293936
Comment Added - 2/12/2020 5:33 PM

Cindy, I could not process the spoa that I have updated the allocation in

Email sent: Cynthia Subia <CINDY.SUBIA@CUANSCHUTZ.EDU>

Add Comment

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):

- ☐ Cynthia Subia (Prepared for, Requisition prepared by) <CINDY.SUBIA@CUANSCHUTZ.EDU>
- ☒ Gloria Chavez (Prepared by) <Gloria.Chavez@cu.edu>

[add email recipient...](#)

1000 characters remaining

Attach file to this document (optional):

Attachment Type File

File Name

File Choose File No file chosen

Add Comment Close

Handout:

<https://tinyurl.com/cu-marketplace>

TIP 2 – CHECK FOR OVER-INVOICING

Voucher Number **S2289023** Supplier Account No. Available Actions Add Comment Go

Vendor Invoice No. **3151358**

Vendor Name **Key Lime Air Corporation** Print

Buyer Invoice Approvals **Matching** Comments Supplier Messages Attachments (17) History

?

🔔 Please see the highlighted items below for any matching exceptions.

[Hide expanded related Documents](#)

PO Number : **1001251019** 🔍

Match Status	Matching Method	Invoice Line No.	PO Line No.	Catalog No.	Description	Size/Packaging	Unit Price	Quantity	Ext. Price
🔍 ↔ Unmatched	2 Way PO/Invoices	1	1		SPO Description - MBB Charter Flight Services		1.00 USD	33,318.99	33,318.99 USD

Matching Exceptions:

- Invoice extended price exceeds PO by: 40,652.99 USD

Matching Summary

	Ordered	Received	Net Invoiced
Quantity:	162,419.02	--	203,072.01
Unit Price	1.00 USD	--	1.00 USD
Ext. Price:	162,419.02 USD	--	203,072.01 USD
Document TS&H:	0.00 USD	--	0.00 USD

Handout:


<https://tinyurl.com/cu-marketplace>


TIP 3 – CHECK FOR RECEIVING

For
POs > \$10,000
only


Voucher Number **S2283146** Supplier Account No. Available Actions


Vendor Invoice No. **3284366**

Vendor Name **Thorlabs Inc** 

 Please see the highlighted items below for any matching exceptions.

[Hide expanded related Documents](#)

PO Number : [1001307672](#) 

	Match Status	Matching Method	Invoice Line No.	PO Line No.	Catalog No.	Description	Size/Packaging	Unit Price	Quantity	Ext. Price
	Unmatched	3 Way	1	1	CFB1500	500mm Tall Cerna Functional Body HTSU: 9011900000	EA	600.90 USD	1	600.90 USD

Matching Exceptions:

- No receipt has been entered

Matching Summary

	Ordered	Received	Net Invoiced
Quantity:	1	--	1
Unit Price	600.90 USD	--	600.90 USD
Ext. Price:	600.90 USD	--	600.90 USD
Document TS&H:	0.00 USD	--	306.03 USD

Related Documents
Invoices: 0 / Credits: 0 / Receipts: 0

TIP 4 – CONFIRM VOUCHER APPROVAL

For
SPOs only

Voucher Number **S2289036** Supplier Account No.


Vendor Invoice No. **08989401**

Vendor Name **Bottling Group LLC**

Buyer Invoice Approvals Matching Comments Supplier Messages Attachments (2) History

Show skipped steps ☐


Orientation Horizontal

 Submitted
Peter Ciacco
2/6/2020 1:13 PM

Hold Until Matched
Completed ✓

SPO Voucher Approval
Active ↻
[View approvers](#)

OK to Pay
Future →

 Finish

TIP 5 – CONFIRM SERVICE DATES

For
SPOs only

Voucher Number **S2289072** Supplier Account No. Available Actions **Add Comment** **Go**
 Vendor Invoice No. **058133739-003**
 Vendor Name **United Natural Foods Inc**

Buyer Invoice Approvals Matching Comments Supplier Messages Attachments (1) History

Summary General Payment Information Discount, Tax, Shipping & Handling Codes ?

[Hide header](#) [Hide value descriptions](#)

General ?		Addresses ?	Payment Status Information ?
Workflow Status	Pending SPO Date Review	Remit To PO Box 742930 Los Angeles, CA 90074-2930	Accounting Date 2/6/2020 Paid/Cancelled Date <i>no value</i> Pay Status In Process Payment Method Unknown Check No. <i>no value</i>
Vendor Name	United Natural Foods Inc more info...	United States Address Id 5 3rd Party Add	
Voucher Type	Invoice		
Voucher Number	S2289072		
Vendor Invoice No.	058133739-003		
Vendor Invoice Date	1/24/2020		
Discount Date	<i>no value</i>		
Due Date	2/23/2020		
Terms	0% 0, Net 30		
Terms Discount	0.00 USD		
Use Terms Discount	✓		

Line Item Details ?

[Hide line details](#)


1001105475

PO Line	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price												
Standing Purchase Order - Sole Source Request more info...																		
1	SPO Description - Organic and natural foods for resale and grab-n-go.			1.00 USD	1,729.59	1,729.59 USD												
Begin Date 1/19/2019 End Date 1/18/2020 Standing Order 1000912352 PO # being replaced more info...		Financial Report <i>no value</i> Comments Commodity Code 07 Food Related Products & Services PO Number 1001105475 PO Creator Sabino Nava Name		Substitute Item Tolerance Status Exact Line Match Status Matched Workflow Status Approved Matching Summary <table border="1"> <thead> <tr> <th></th> <th>Ordered</th> <th>Received</th> <th>Net Invoiced</th> </tr> </thead> <tbody> <tr> <td>Quantity:</td> <td>600,000</td> <td>--</td> <td>474,149.92</td> </tr> <tr> <td>Ext. Price:</td> <td>600,000.00 USD</td> <td>--</td> <td>474,149.92 USD</td> </tr> </tbody> </table>				Ordered	Received	Net Invoiced	Quantity:	600,000	--	474,149.92	Ext. Price:	600,000.00 USD	--	474,149.92 USD
	Ordered	Received	Net Invoiced															
Quantity:	600,000	--	474,149.92															
Ext. Price:	600,000.00 USD	--	474,149.92 USD															

TIP 6 CHECK FOR AP HOLDS

Voucher Number **S2289011** Supplier Account No. Available Actions


Vendor Invoice No. **5007355**


Vendor Name **Taconic Biosciences GmbH** 

Buyer Invoice Approvals Matching Comments Supplier Messages Attachments (2) History

Summary General Payment Information Discount, Tax, Shipping & Handling Codes ?

[Hide header](#) [Hide value descriptions](#)

General ?		Addresses ?	Payment Status Information ?
Workflow Status	 Pending AP Hold Review	Remit To Petra Grosch Neurather Ring 1 Koln, NW DE51063 Germany Email finance_germany@taconic.com Phone 49-221-96453-14 Address Id 2 3rd Party Address ID 2019-10-07p28421570	Accounting Date 2/6/2020 Paid/Cancelled Date <i>no value</i> Pay Status In Process Payment Method Unknown Check No. <i>no value</i>
Vendor Name	Taconic Biosciences GmbH more info...		
Voucher Type	Invoice		
Voucher Number	S2289011		
Vendor Invoice No.	5007355		
Vendor Invoice Date	1/31/2020		
Discount Date	<i>no value</i>		
Due Date	3/1/2020		
Terms	0% 0, Net 30		
Terms Discount	0.00 USD		
Use Terms Discount	✓		
Invoiced By	Thuylan Nguyen		
Match Status	Matched		
Voucher Source	Manual		
Contains substituted item(s)	✗		
Supplier No.	0000412829		
	View/edit by line item...		

Payment Information ?	Note/Attachments ?
1099 Indication 1099 Code <i>no value</i> 1099 Indicator *****	Notes From <i>no note</i> Vendor/Payment Status Update Internal Note <i>no note</i>
Payment Information Hold Reason <i>no value</i> Handling Code FO Needs Foreign Postage Payment Message <i>no value</i> AP Hold LOC Needs Location added	External Attachments  Invoice Image Internal Attachments
	View/edit by line item...

Discount, Tax, Shipping & Handling ?

Discount, tax, shipping & handling Allocation Weighted

POLL QUESTION #5

[Back to Results](#)

14 of 196 Results

Voucher Number **S2348500**

Supplier Account No.

Available Actions Vendor Invoice No. **XRP1697**Vendor Name **CDW Government LLC****Buyer Invoice**

Approvals

Matching

Comments (1)

Supplier Messages

Attachments

History

Summary

General

Payment Information


Discount, Tax, Shipping & Handling


Codes

[Hide header](#)[Hide value descr](#)

General ?		Addresses ?		Payment Status Information	
Workflow Status	Pending AP Final Review	Remit To		Accounting Date	4/30/2020
Vendor Name	CDW Government LLC * more info...	Accounts Receivable		Paid/Cancelled Date	<i>no value</i>
Voucher Type	Invoice	75 Remittance Drive		Pay Status	In Process
Voucher Number	S2348500	Suite 1515		Payment Method	Unknown
Vendor Invoice No.	XRP1697	Chicago, IL 60675-5723		Check No.	<i>no value</i>
Vendor Invoice Date	4/29/2020	United States			
Discount Date	<i>no value</i>	Email paulsom@cdwg.com			
Due Date	5/9/2020	Phone 1-800-8084239-			
		Fax 1-847-4196200-			
		Address Id 5			
		3rd Party Address ID 2019-04-19p2508737			



POLL QUESTION #6

Voucher Number **S2342618** Supplier Account No. Available Actions
Vendor Invoice No. **230376048**
Vendor Name **Waters Technologies Corporation** 

 Please see the highlighted items below for any matching exceptions.

[Show Related Documents Expanded](#)

PO Number : **1001296087** 

	Match Status	Matching Method	Invoice Line No.	PO Line No.	Catalog No.	Description	Size/Packaging	Unit Price	Quantity	Ext. Price
	 Unmatched	2 Way PO/Invoices	1	1	22205735	This is to repair Synapt G2 mass spectrometry	EA	8,118.5606 USD	0.66	5,358.25 USD

Matching Exceptions:

- Invoice quantity exceeds PO by: 0.441
- Invoice extended price exceeds PO by:
3,587.75 USD

Matching Summary

	Ordered	Received	Net Invoiced
Quantity:	1	--	1.441
Unit Price	8,108.00 USD	--	8,114.596 USD - 8,118.5606 USD
Ext. Price:	8,108.00 USD	--	11,695.75 USD
Document TS&H:	0.00 USD	--	0.00 USD

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Payment Resource Center

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[Looking Up Invoices](#)

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Look up payments processed on the Payment Authorization (PA) and Non-Employee Reimbursement - International (NRI) forms using the Finance System.

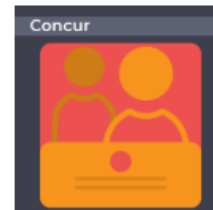


[Looking Up Study Subject Payments](#)

Look up payments processed on the Study Subject Payment (SSP) form using CU-Data.

Looking Up Reimbursements Processed in Concur

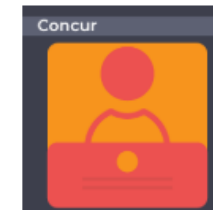
Reimbursements to Non-Employees



[Looking Up Non-Employee Reimbursements](#)

Look up non-employee reimbursements in Concur if you processed the reimbursement and just want to know if it has paid.

Reimbursements to Employees



[Looking Up Employee Reimbursements](#)

Look up employee reimbursements in Concur if you are the report owner, their delegate or their approver.

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cu.cpe@cu.edu



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CPE for CPAs

CPE is great for managers.
Watch the video below to find out why.



CPE Commercial - Susan



Watch later



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CPE Commercial - Mark



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Troubleshooting Tips for
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Payment Resource Center
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QUESTIONS?





Thank you!

A recording of this webinar will be made available.