

Step-by-Step Guide

Placing Vouchers (Invoices) on Hold in CU Marketplace

In This Guide

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 SpeedType Fiscal Staff approval occurs. Placing a voucher on hold will prevent payment from occurring... and therefore can only be placed on vouchers that haven't paid yet.

This guide discusses:

- ✓ Locating pay status of vouchers
- ✓ Placing vouchers on hold

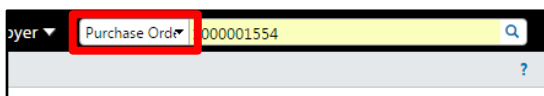
Note: For vouchers related to Purchase Orders (POs) over \$5,000, receiving is required for payment to occur. Withhold payment on these vouchers by not entering receiving instead of following the steps in this guide. (Use this guide if receiving has been done.)

Procedure

1. Begin by accessing CU Marketplace via [your campus portal](#). Within your portal's top navigation bar, use the **Business Tools** dropdown menu to select **CU Marketplace**.
2. Locate the voucher using one of the following methods:

Method 1: Voucher/PO # known

If you know the voucher or PO #, use the Quick Search.



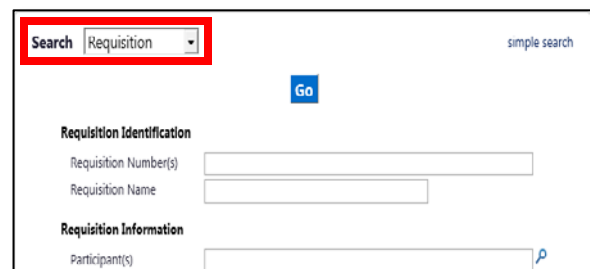
Click in the Search box, located in the upper right corner of your screen.

If searching by voucher #: Use the dropdown to select *Voucher Number* and enter the voucher in the next field; click the **Search** button (magnifying glass).

If searching by PO #: Use the dropdown to select *All* and enter the PO in the next field; click the **Search** button (magnifying glass). Select the voucher from the resulting list.

Method 2: Voucher/PO # not known

If you do not know the PO or voucher #, perform a Document Search. Use your side navigation bar and go to **Orders & Documents > Document Search > Search Documents**.



If needed, click the **advanced search** link in the upper right corner of your screen. Use the **Search** dropdown to search by *Invoice/Voucher*. Enter your search criteria and click the **Go** button.

A list of results will appear. Use the left side of your screen to refine your search. Select the voucher from the resulting list.

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- On the voucher's **Summary** page, review the Pay Status located under the **Payment Status Information** section.

Buyer Invoice		Approvals	Matching	Comments	Attachments	History
Summary		Payment Information	Discount, Tax, Shipping & Handling	Codes		
Hide header		Hide value descriptions				
General	Addresses	Payment Status Information				
Workflow Status: ✓ Completed (3/21/2012 7:17 PM)	Remit To PO Box 802816 Chicago, IL 60680-2816 United States Phone - - - Toll Free Phone - - - Fax - - - Address Id 14 3rd Party Address ID 14	Accounting Date: 4/17/2012 Export Date: 3/21/2012 7:19 PM Paid/Cancelled Date: 4/17/2012 Pay Status: Paid Payment Method: Check Check No.: 0002343391				
Vendor Name: Dell Marketing LP						
Voucher Type: Invoice						
Voucher Number: S0089974						
Vendor Invoice No.: XFPC43X25						
Vendor Invoice Date: 3/21/2012						
Discount Date: no value						
Due Date: 4/20/2012						

- If the Pay Status = *Paid*
 - If the Pay Status = *Paid*, payment been mailed and this voucher therefore **cannot be placed on hold**.
 - If the Pay Status = *Payable* or *In Process*, this voucher **might** be able to be placed on hold.

Whether a voucher can be placed on hold is dependent on when the hold request is processed. For example, a voucher can change Pay Status from *Payable* to *Paid* while a hold request is being submitted.

- Submit your hold request by adding a comment to your voucher. Go to the **Comments** tab and click the **Add Comment** button. Be sure to check the box next to the Payable Services technician's name so he or she is notified when you add the comment.

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):

☒ Mai Ngo <mai.ngo@cusys.edu>
[add email recipient...](#)

Please put this voucher on holder. I didn't receive the correct items and am working with the vendor to correct.

888 characters remaining [expand](#) [clear](#)

Attach file to this document (optional):

Attachment Type: File

File Name:

File: [Browse...](#)

Add Comment [Cancel](#)