UNIVERSITY OF SOUTH ALABAMA

FLAGSHIP OF THE GULF COAST®

Concur
Creating a Non-PO Invoice Manual

Procurement Card and Travel Services
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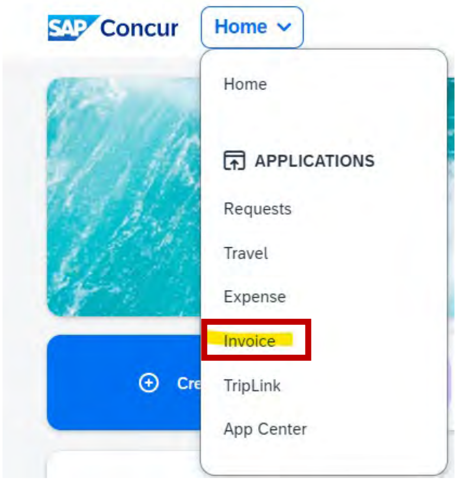
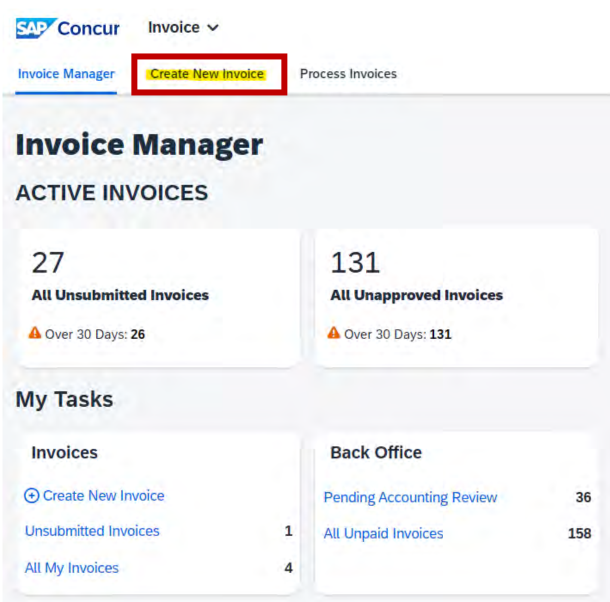
pcardandtravelsvcs@southalabama.edu

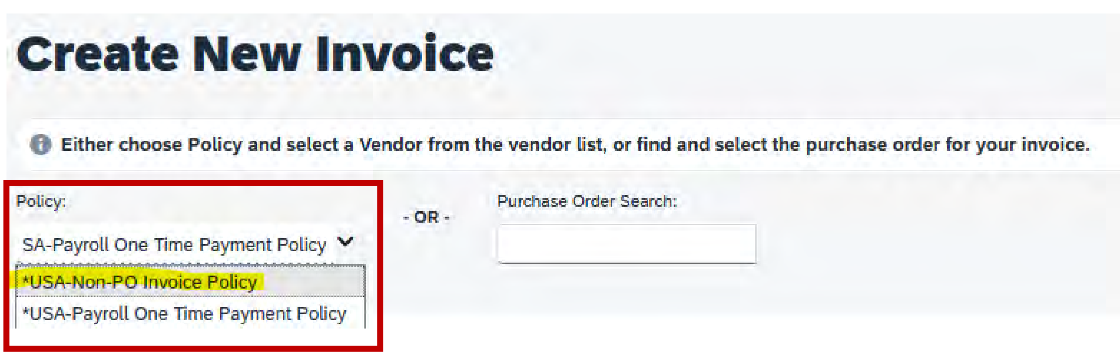
1. **Log into Concur and select Invoice.**



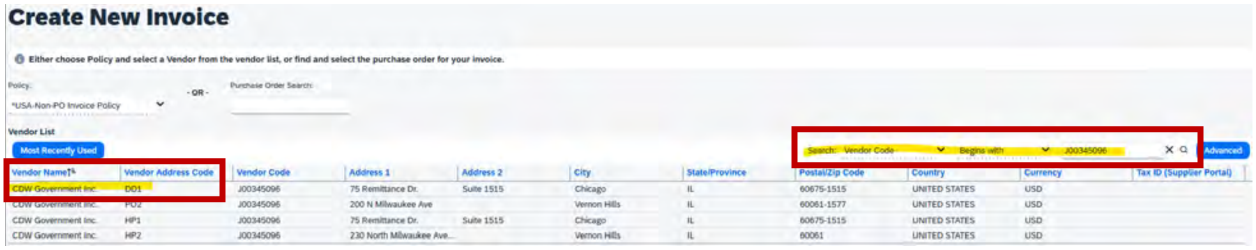
2. **Click Create New Invoice.**



3. **In the Policy dropdown field select *USA-Non-PO Invoice Policy.**



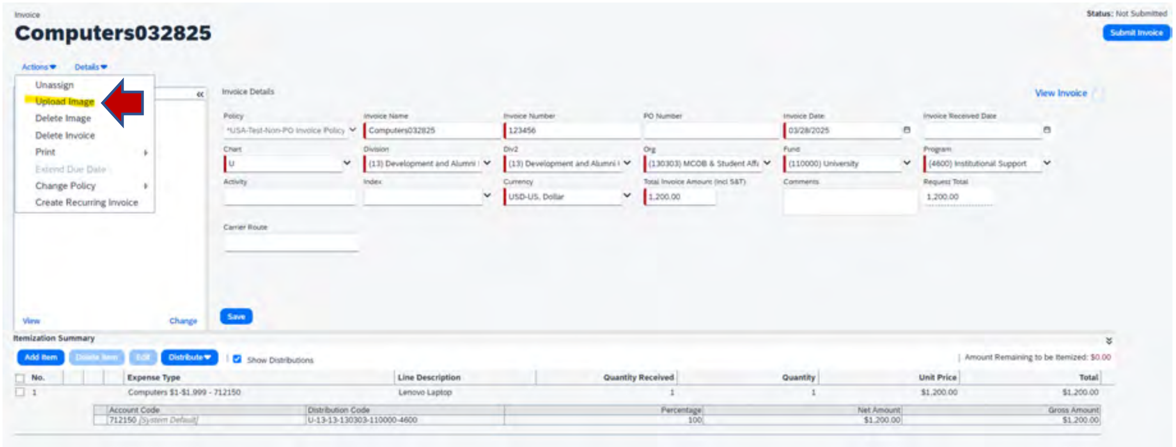
4. Search for the vendor using the query fields to the right. Once you locate the vendor select the vendor option with “DD1” (preferred), “HP”, or “AP” as the Vendor Address Code. Never select the option with “XX1” as the Vendor Address Code when using the *USA Non-PO Invoice Policy. If you are unable to locate the vendor please contact Accounts Payable.



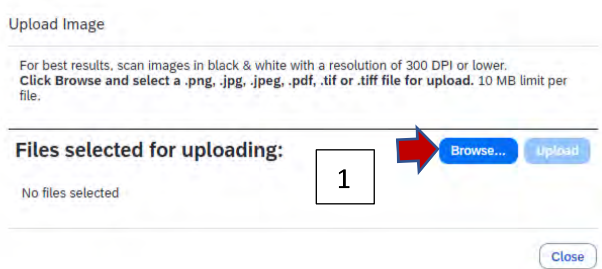
5. Complete all required fields as indicated by the redline in the left-hand side of the fields. Then click Save.

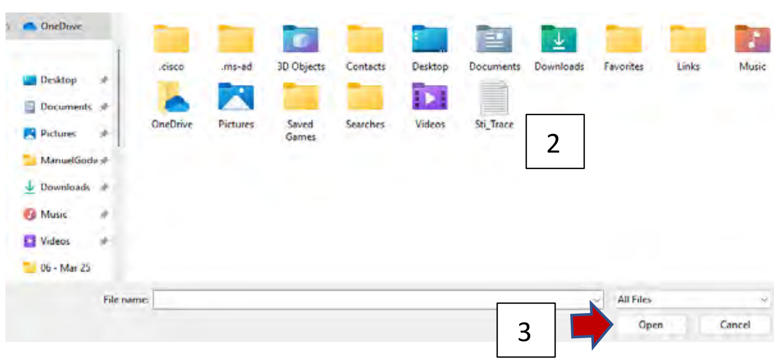
6. Query for the account code in the Expense Type field. Select the appropriate account and complete the remaining required fields as indicated by the red asterisk next to the field label. Then click Save.

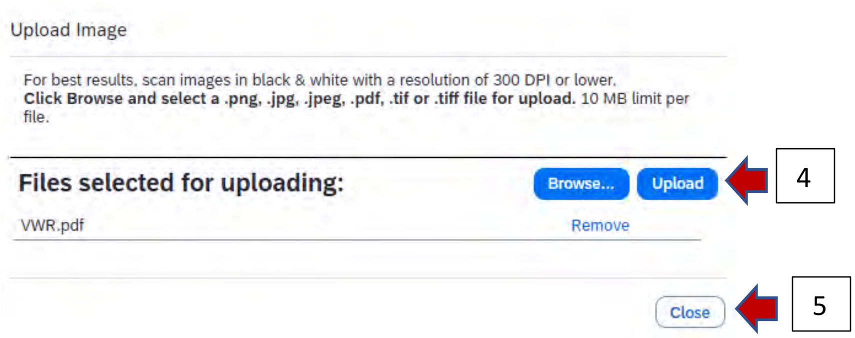
7. **Now you need to upload the invoice. Select Actions – Upload Image.**



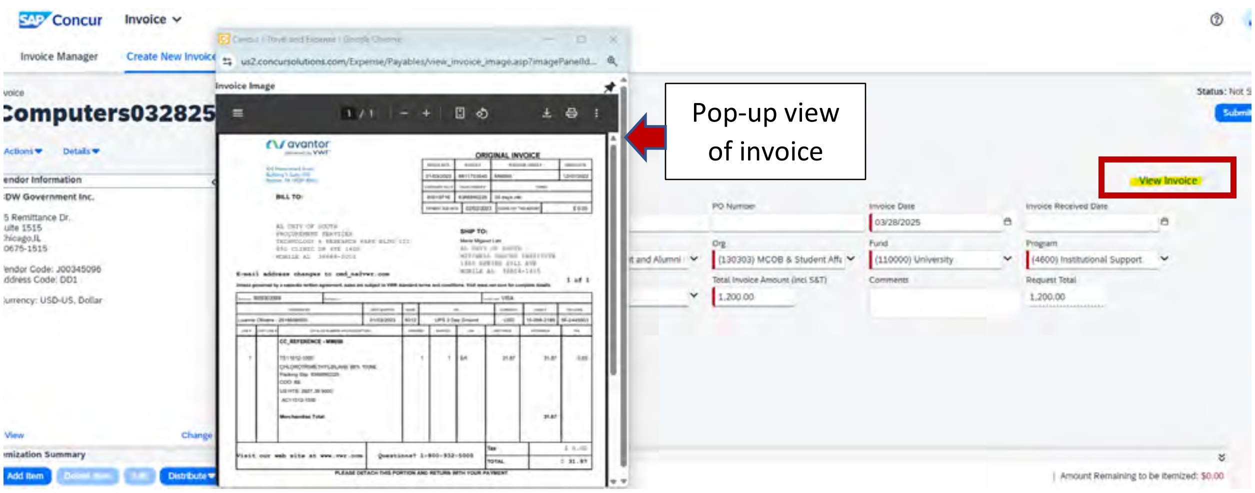
8. **Click browse and locate the invoice wherever you saved it and select it. Then click Open – Upload – and lastly Close.**

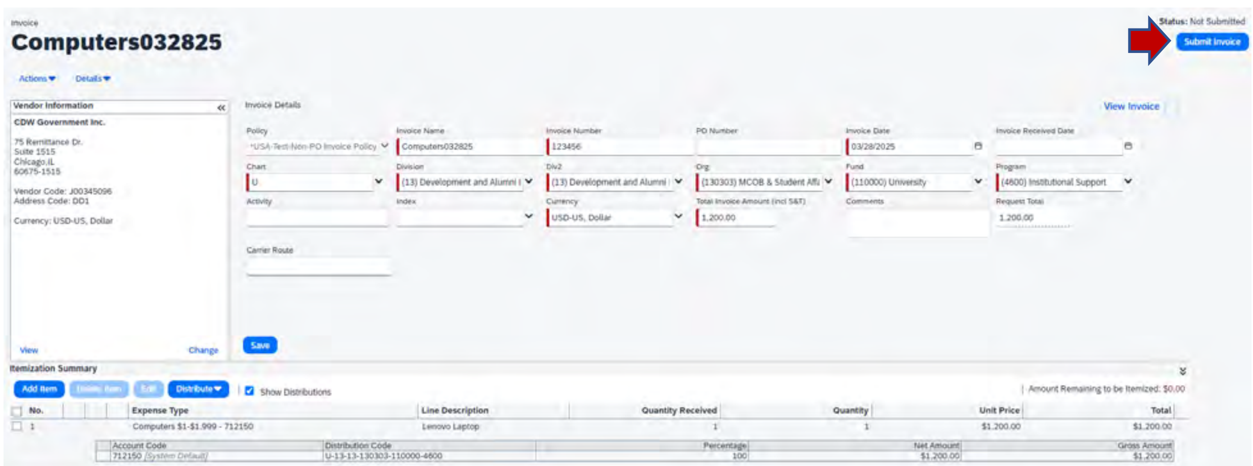




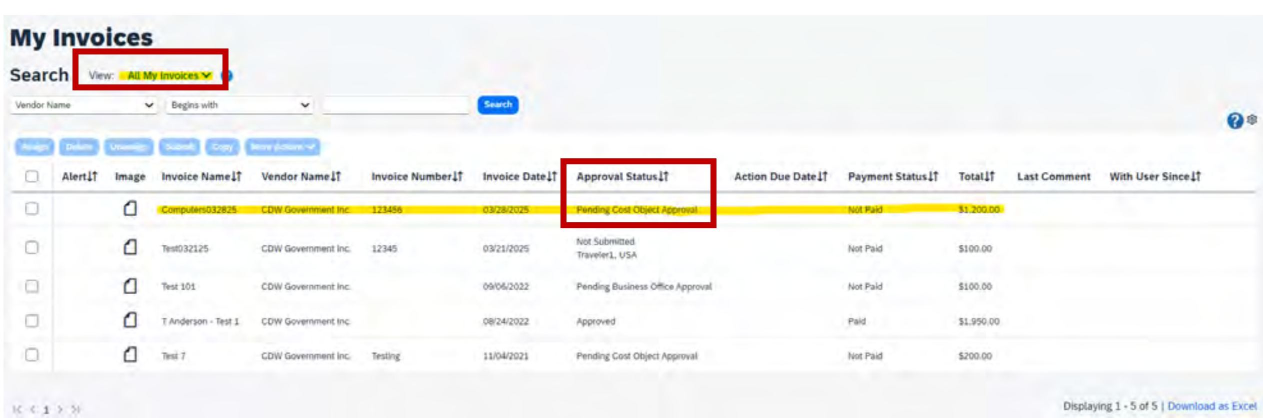


9. **Confirm that your invoice uploaded and is legible. Click View Invoice and your invoice image will pop-up. Once confirmed close the pop-up window and click Submit Invoice.**





10. **After you click Submit Invoice you will automatically be taken to the My Invoices screen. Here you can select "All My Invoices" in the View field if you wish to verify your invoice has been submitted.**

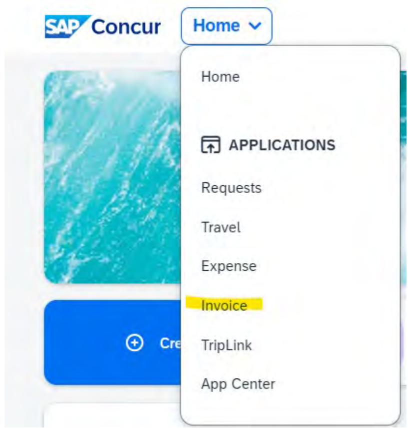


Other Miscellaneous Instructions

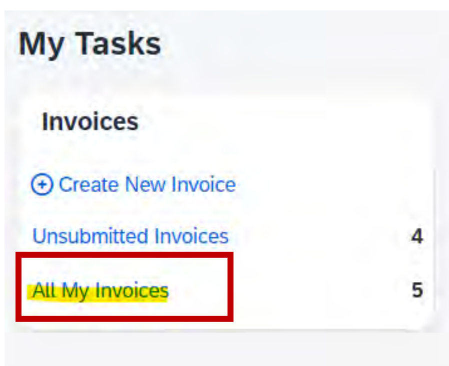
How to Recall an Invoice

Invoices can be recalled as long as Accounts Payable has not fully processed/approved the invoice. Instructions for recalling an invoice are below.

1. Log into Concur and go to Invoice.

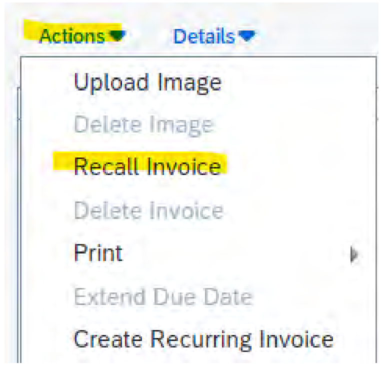


2. Select All My Invoices.

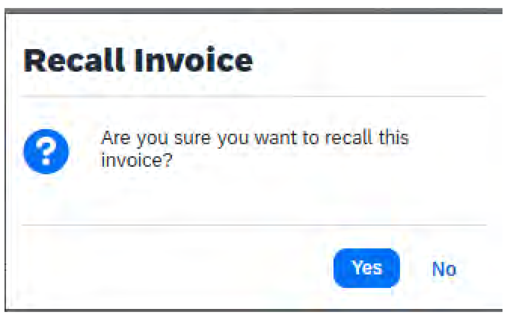


3. Select the invoice you wish to recall.

4. Go to Actions and select Recall Invoice.



5. Confirm you wish to recall by clicking Yes on the pop-up.

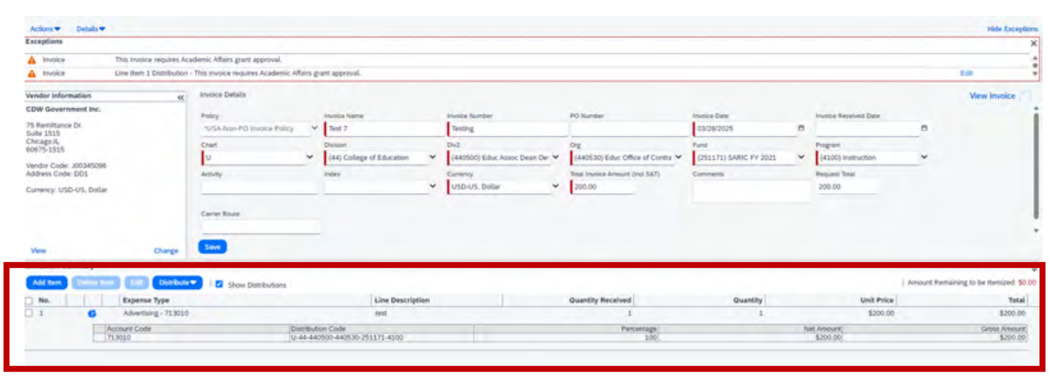


6. You will remain on your invoice. You can now make your changes and submit the invoice again. Or if you need to delete it select Actions – Delete Invoice.

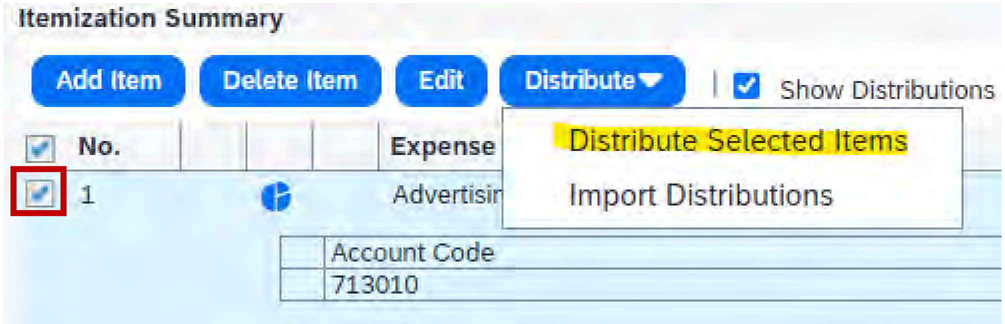
How to Distribute (charge multiple funding sources) on one invoice

You can charge multiple fund/org/account codes on the same invoice using the Distribute feature. There are multiple ways you can get to the Distribute feature. These instructions only cover one.

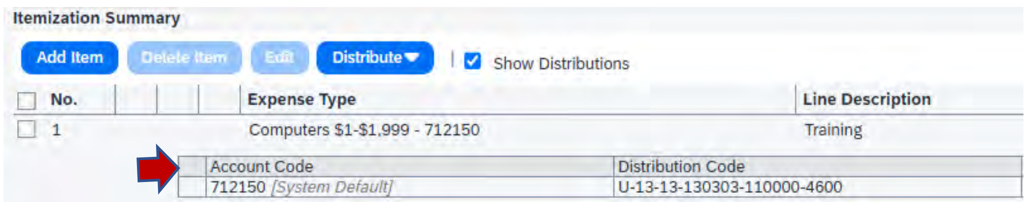
1. While you are in your invoice go to the bottom section titled “Itemization Summary”.



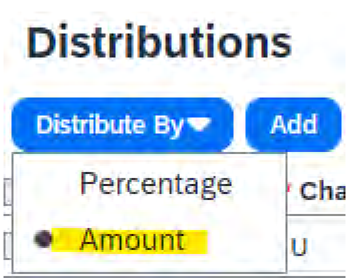
2. Select the line item and click Distribute or use the Alternate method. These instructions are not based on the Alternate method.



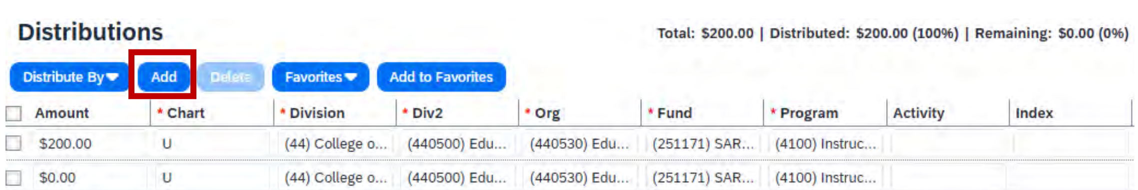
Alternately you can click on the header with the titles Account Code, Distribution Code, etc. to get to the Distribution feature.



3. The Distributions feature will open. You can distribute by Percentage (default) or Amount. To change how you wish to distribute select Distribute By and then the way you wish to distribute. In this example we are going to use Amount.

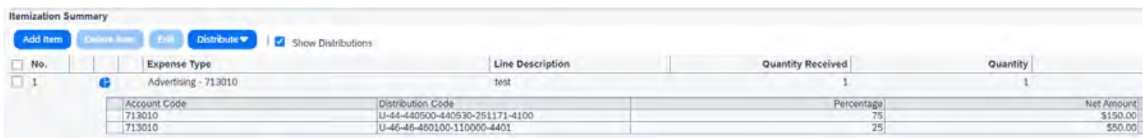


4. Once you have selected how you wish to distribute click Add. This will open another line to add an additional fund/org/prog.



5. Adjust the Amount field to how you wish to distribute and select the appropriate Funds/Orgs/Program codes. Then click Save. Note the distributed amount must be 100%.

6. Once you click Save you will see your distribution on your invoice under the Itemization Summary section.



7. If it looks good click Submit Invoice. If you need to change just click on the Account Code title in the Itemization Summary and make your changes.