Hello and welcome to our Oracle Procurement Video Guide series. This video on submitting invoices will cover responsibilities of the department and supplier, different invoice submission options, and submitting invoices through Payment Compass.

Before we begin, it is important to understand the responsibilities of both the department purchasing the goods and the supplier. The department is responsible for creating a Purchase Order before goods have been received or services have been rendered. The PO is a contractual agreement between UC San Diego and the supplier, protecting all parties involved in the transaction. Suppliers are encouraged to withhold fulfillment until the PO has been provided. On the other hand, the supplier is responsible for submitting invoices to UC San Diego's Accounts Payable team.

Before submitting invoices through Payment Compass or inviting suppliers to do so, you will need to ensure that your supplier is not an EI vendor. You can check this by looking for the electronic invoicing flag on the [Finding & Adding Oracle Procurement Suppliers Blink page].

If they are an electronically invoicing supplier, UC San Diego receives their invoice data electronically when the supplier submits their invoice to Transcepta, our third-party invoicing partner. If they are not an EI supplier, then invoices are uploaded to Payment Compass by either yourself or the supplier.

Let's start by navigating to Payment Compass at paymentcompass.ucsd.edu. Once on the landing page, select the option to log in via Single Sign-On. After you have logged in, search for the supplier for whom you would like to submit invoices using the search bar using either their name or supplier ID. On the supplier's payment status page, select the option to submit an invoice for this payee.

Here, you will need to complete three fields. In the Invoice Number field, enter in your unique invoice number. In the PO Number field, enter your UC San Diego PO number. This number will be eight digits long and begin with a 9, or be eleven digits long and begin with PUR. In the Invoice Total field, enter the total of your invoice excluding dollar signs and commas. Once this section has been completed, select the Next button.

Here, you can upload your invoice by either browsing your files or by dragging and dropping a file into the designated area. Although PDF documents are preferred, other file options are listed here. Once the file has been uploaded, you may select the option to submit your invoice. It is important to verify that the correct file has been uploaded as selecting this option will complete the submission process. If you realize you have uploaded the incorrect document, then you may select the option to cancel your invoice submission.

After the invoice has been submitted, a preview of the document will appear as well as the previously entered invoice information. If you realize you have uploaded the incorrect document, then you may select the option to request a cancellation. A confirmation will be sent to you when the invoice has been successfully canceled.

Outside of this circumstance, your invoice will show on the vendor's payment status page, and the invoice will be paid according to the payment terms listed on the PO.

Thank you for taking the time to watch our video guide – we hope this information has been helpful. If you have any further questions, please reach out to us by submitting a case through Services & Support or by calling us at 858.534.9494.