

Business Partner Self Service

Creating an Invoice from a Purchase Order



Business Partner Self Service

Creating an Invoice from a Purchase Order

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The system displays a list of all purchase orders related to goods or services you have provided to CalSTRS.

List of Purchase Orders

Print | Download

Docu...	Document Name	Docum...	Status	T
8100000127	Office supplies - paper cutters	01/22/2013	New	3
8100000125	Private Equity Consultants	01/17/2013	New	
8100000124	Private Equity Consultant	01/17/2013	New	3,5
8100000122	EIT TURTLES	01/15/2013	Confirmed	1
8100000120	Local Purchase Order1 ITSECTEST038 01/15	01/15/2013	New	
8100000119	Lines:	01/14/2013	New	207
8100000118	Local Purchase Order1 ITSECTEST038 01/14	01/14/2013	In Process	5
8100000117	ITSECTEST038 01/10/2013 16:09	01/10/2013	New	36,0
8100000116	Lines:	01/09/2013	New	2,7
8100000115	Lines:	01/09/2013	Confirmed	202
8100000114	Lines:	01/09/2013	Confirmed	250

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SAP SRM

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List of Purchase Orders

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	Docu...	Document Name	Docum...	Status	T
<input type="checkbox"/>	8100000127	Office supplies - paper cutters	01/22/2013	New	3
<input type="checkbox"/>	8100000125	Private Equity Consultants	01/17/2013	New	
<input type="checkbox"/>	8100000124	Private Equity Consultant	01/17/2013	New	3,5
<input type="checkbox"/>	8100000122	EIT TURTLES	01/15/2013	Confirmed	1
<input type="checkbox"/>	8100000120	Local Purchase Order1 ITSECTEST038 01/15	01/15/2013	New	
<input type="checkbox"/>	8100000119	Lines:	01/14/2013	New	207
<input type="checkbox"/>	8100000118	Local Purchase Order1 ITSECTEST038 01/14	01/14/2013	In Process	5
<input type="checkbox"/>	8100000117	ITSECTEST038 01/10/2013 16:09	01/10/2013	New	36,0
<input type="checkbox"/>	8100000116	Lines:	01/09/2013	New	2,7
<input type="checkbox"/>	8100000115	Lines:	01/09/2013	Confirmed	202
<input type="checkbox"/>	8100000114	Lines:	01/09/2013	Confirmed	250

Rejected
Canceled by Customer
Shipping Notifications

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To create an invoice for a purchase order, click the purchase order number in the Document column. For this example, we are clicking on 8100000127.



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SAP SRM

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[List of Purchase Orders](#) > Display Purchase Order

Messages

Warning: Message from Purchaser: This supply has to be delivered by the close of business Januar

The system displays the purchase order for your review.

- Partially Confirmed
- Purchase Orders**
 - All
 - New
 - Changed
 - In Process
 - Confirmed
 - Partially Accepted by Customer
 - Rejected
 - Canceled by Customer
- Shipping Notifications

Display Purchase Order

[Create Invoice](#) | [Display History](#) | [Display Document Flow](#) | [Print](#) | [Download](#)

Basic Data

Document Number	8100000127
Document Name	Office supplies - paper cutters
Document Date	01/22/2013
Purchase Order No.	2000000247

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The screenshot displays the SAP SRM Business Partner Self Service interface. At the top, there is a navigation bar with tabs for 'Users Administration', 'Own Administration', 'Invoices and Credit Memos', 'Messages', and 'Purchase Orders'. Below this, a breadcrumb trail shows 'Process | Confirmed | Partially Confirmed | Rejected | Canceled by Customer'. The main content area is titled 'SAP SRM' and includes a left-hand navigation menu with categories like 'Find', 'Purchase Orders', and 'Shipping Notifications'. The 'Purchase Orders' section is expanded, showing various status filters. The main display area shows a 'List of Purchase Orders' with a 'Display Purchase Order' link. Below this, a 'Messages' section contains a warning message: 'Warning: Message from Purchaser: This supply has to be delivered by the close of business January 30th.' The 'Display Purchase Order' section features a row of buttons: 'Create Invoice', 'Display History', 'Display Document Flow', 'Print', and 'Download'. The 'Create Invoice' button is highlighted with a yellow callout box that contains the text 'Click the Create Invoice button.' Below the buttons is a 'Basic Data' section with a table of fields: Document Number (8100000127), Document Name (Office supplies - paper cutters), Document Date (01/22/2013), and Purchase Order No. (2000000247). The bottom of the page has a 'CONTENTS' button, a page indicator 'L3 H1', and navigation arrows.

The screenshot shows the SAP SRM interface for processing an invoice. A yellow callout box contains the text: "The system displays the *Process Invoice* screen." The interface includes a navigation menu on the left, a breadcrumb trail at the top, and a main content area with a form and a table.

Navigation Menu:

- Users Administration
- Own Administration
- Invoices and Credit Memos
- Messages
- Purchase Orders
- Process | Confirmed | Partially Confirmed | Rejected | Canceled by Customer

Breadcrumb Trail: Home | Find | Help | FAQ | Log off

Process Invoice Form:

- Status: In Process
- Description: Office supplies - paper cutters
- Document Date: 01/22/2013
- External Reference: 200000247

Products and Services Table:

Number	Product Type	Product	Description	Quantity	Unit of Measure	Net Value	Tax
10	Material		Office supplies - paper cutters	5	each	399.95 USD	Not Val

Page 1 of 1

Information from the purchase order is copied to the invoice. Scroll down the screen to review invoice details.

SAP SRM | Home | Find | Help | FAQ | Log off

Users Administration | Own Administration | Invoices and Credit Memos | Messages | Purchase Orders

Process | Confirmed | Partially Confirmed | Rejected | Canceled by Customer

History | Back | Forward

Process Invoice

Send | Hold | Cancel | Update Price

Basic Data

Invoice	9100000051
Status	In Process
Description	Office supplies - paper cutters
Document Date	01/22/2013
External Reference	2000000247

Products and Services

Number	Product Type	Product	Description	Quantity	Unit of Measure	Net Value	Tax
10	Material		Office supplies - paper cutters	5	each	399.95 USD	Not Val

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Users Administration | Own Administration | Invoices and Credit Memos | Messages | **Purchase Orders** | History | Back | Forward

Process | Confirmed | Partially Confirmed | Rejected | Canceled by Customer

- Shipping Notifications
 - All
 - In Process
 - Sent
- Shipping Notifications
 - All
 - Sent
- Confirmations
 - All
 - In Process
 - Completion Reported
 - Rejected by Customer
 - Accepted by Customer
 - Canceled
- Confirmations
 - In Process
 - All
 - In Process
 - Completion Reported
 - Partially Accepted
 - Rejected
 - Approved

Page 1 of 1

Partner Information

Partner	Number	Name	Street	House No.	PostCode	Location
Sold-to Party	3100000111	1920	100 Waterfront Place		95605	West Sa

Price Information

Condition	Value
Net Value	
Unplanned Delivery Costs	
Tax	
Gross Price	

Scroll back to the top of the screen when you have completed your review.

Terms of Payment

Payment in Days	Discount in %
<input type="text" value="30"/>	<input type="text" value="0.000"/>
<input type="text" value="0"/>	<input type="text" value="0.000"/>
<input type="text" value="0"/>	

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The screenshot shows the SAP SRM interface for processing an invoice. At the top, there are navigation tabs: Users Administration, Own Administration, Invoices and Credit Memos, Messages, and Purchase Orders. Below these are status filters: Process, Confirmed, Partially Confirmed, Rejected, and Canceled by Customer. The main header includes 'SAP SRM' and 'CALSTRS' logos, along with links for Home, Find, Help, FAQ, and Log off.

The breadcrumb trail is: List of Purchase Orders > Display Purchase Order > Process Invoice. The main section is titled 'Process Invoice' and contains several buttons: Send, Hold, Cancel, Update Prices, Print, and Download. A yellow callout box points to the 'Send' button with the text: "Click the **Send** button to submit your invoice to CalSTRS."

Below the buttons is the 'Basic Data' section with the following fields:

- Invoice: 910000051
- Status: In Process
- Description: Office supplies - paper cutters
- Date: 01/22/2013
- External Reference: 200000247

The 'Products and Services' section contains a table with the following data:

Number	Product Type	Product	Description	Quantity	Unit of Measure	Net Value	Tax
10	Material		Office supplies - paper cutters	5	each	399.95 USD	Not Val

At the bottom of the page, there is a 'CONTENTS' button, a 'Page 1 of 1' indicator, and navigation arrows.

The **Display Invoice** screen is displayed. Scroll to the bottom of the screen to review invoice status.

Messages

Info: Your changes have been adopted successfully

Display Invoice

Set Status Copy Create Credit Memo Display Document Flow Print Download

Basic Data

Invoice	9100000051
Status	Document Sent
Status (New)	Accepted by Customer
Description	Office supplies - paper cutters

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Help | Personalize | Log off CALSTRS

Users Administration | Own Administration | Invoices and Credit Memos | Messages | Purchase Orders

Process | Confirmed | Partially Confirmed | Rejected | Canceled by Customer

History | Back | Forward

Sold-to Party 3100000111 1920 100 Waterfront Place 95605 West Sacramento

Price Information

Condition	Value
Net Value	399.95 USD
Unplanned Delivery Costs	0.00 USD
Tax	0.00 USD
Gross Price	399.95 USD

Terms of Payment

The status of your invoice is displayed in the lower section of the screen. In this example, the system displays the message, "Payment may not yet have been made."

Payment Status

Date	Invoiced Amount	Paid Amount	Status
			Payment may not yet have been made

[Check Payment Status](#)

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History | Back | Forward

Sold-to Party 3100000111 1920 100 Waterfront Place 95605 West Sacramento

Price Information

Condition	Value
Net Value	399.95 USD
Unplanned Delivery Costs	0.00 USD
Tax	0.00 USD
Gross Price	399.95 USD

Click the **Check Payment Status** button to see if CalSTRS has processed your payment. Since this invoice was just submitted, no payment information would be viewable.

Payment Status

Date	Invoiced Amount	Paid Amount	Status
Payment may not yet have been made			

[Check Payment Status](#)

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History | Back | Forward

- Cancelled
- Confirmations
 - In Process
 - All
 - In Process
 - Completion Reported
 - Partially Accepted
 - Rejected
 - Approved
 - Cancelled
- Invoices and Credit Memos
 - All
 - In Process
 - Document Sent
 - Approved
 - Rejected
 - Create Invoice
- Invoices and Credit Memos
 - All
 - In Process
 - Document Sent
 - Accepted by Customer
 - Rejected by Customer

Sold-to Party	3100000111	1920	100 Waterfront Place		95605	West Sacramento	
---------------	------------	------	----------------------	--	-------	-----------------	--

Price Information

Condition	Value
Net Value	399.95 USD
Unplanned Delivery Costs	0.00 USD
Tax	0.00 USD
Gross Price	399.95 USD

Terms of Payment

Payment in Days	Discount in %
30	0.000
0	0.000
0	

Scroll back to the top of the screen to exit the invoice.

Payment Status

Date	Invoiced Amount	Paid Amount	Status
			Payment may not yet have been made

[Check Payment Status](#)

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Users Administration | Own Administration | Invoices and Credit Memos | Messages | Purchase Orders

Process | Confirmed | Partially Confirmed | Rejected | Canceled by Customer

History | Back | Forward

Click the **Home** tab to return to the Business Partner Self Service home page.

Display Invoice

Set Status | Copy | Create Credit Memo | Display Document Flow | Print | Download

Basic Data

Invoice	9100000051
Status	Document Sent
Status (New)	Accepted by Customer
Description	Office supplies - paper cutters

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Universal Worklist

Waiting for update

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[Create Task](#) [Show F](#)

Row : 0 of 0:

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Click the course contents button in the lower left corner of the screen to review another selection or click the NEXT button to proceed to the next lesson.

Business Partner Self Service

Course Completion

CONGRATULATIONS

You have completed the online course for the CalSTRS Business Partner Self Service system.

If you would like to review any of the lessons or sections, click the CONTENTS buttons to navigate to the topic of your choice.

To exit this course, simply close the browser.



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