genpact

Buyer Portal
Invoice Creation (EMEA and APAC)

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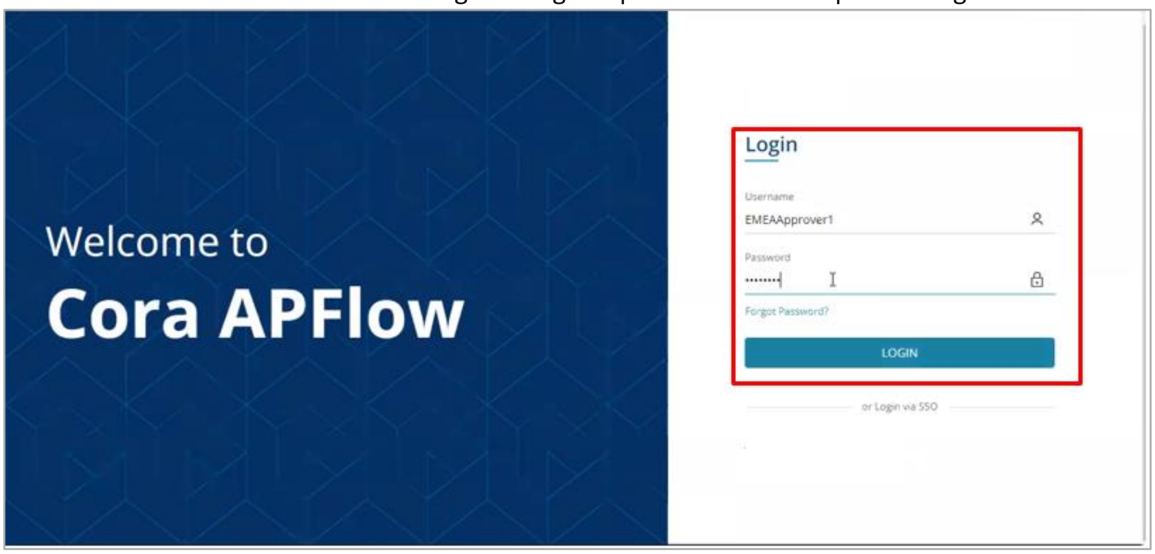
Overview

The Non PO invoices are created by Requestors in the Buyer Portal. Creating an invoice involves entering the required details in the business fields and uploading them for processing by the Genpact Operations team.
Note: This process described in this document is for Non PO invoices.

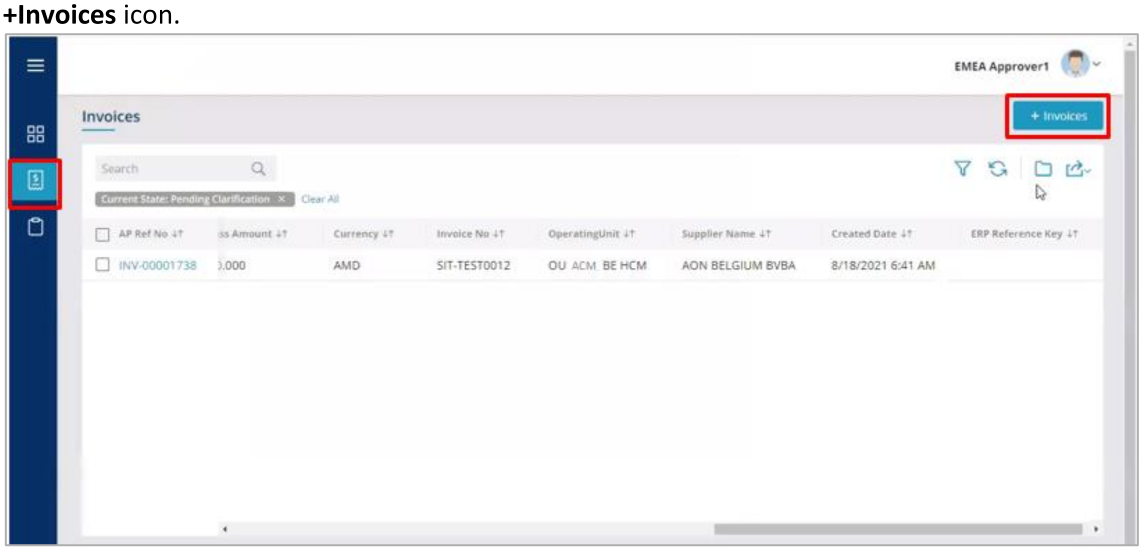
Process Description

To create and upload invoices in the Buyer Portal, the Requestor performs the following steps:

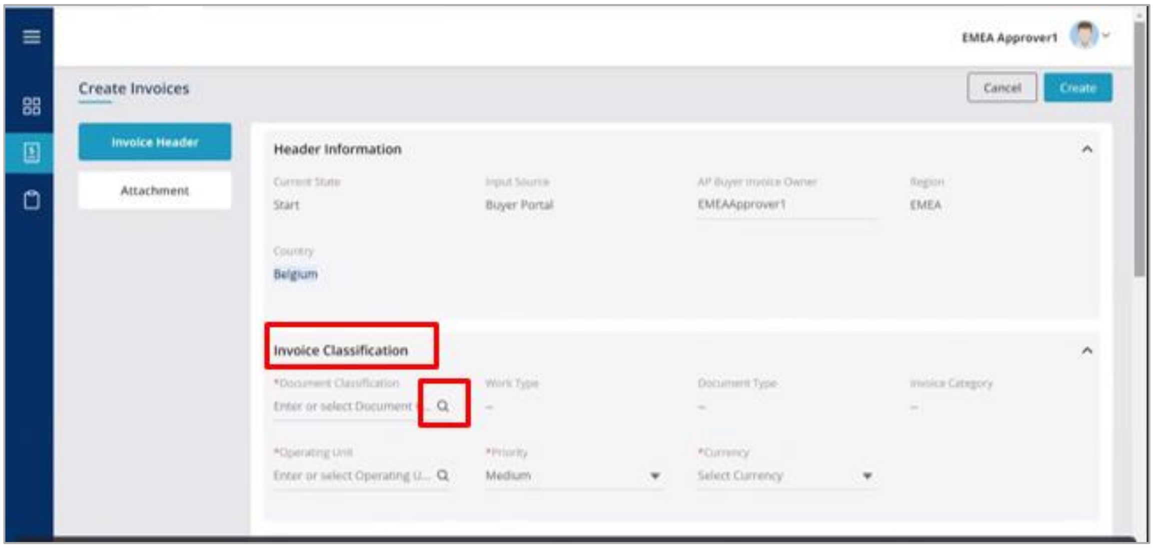
1. On the login screen of the Buyer Portal, enter the login credentials in the **Username** and **Password** fields.
   Note: EMEA and APAC users should log in using the profile of their respective regions.



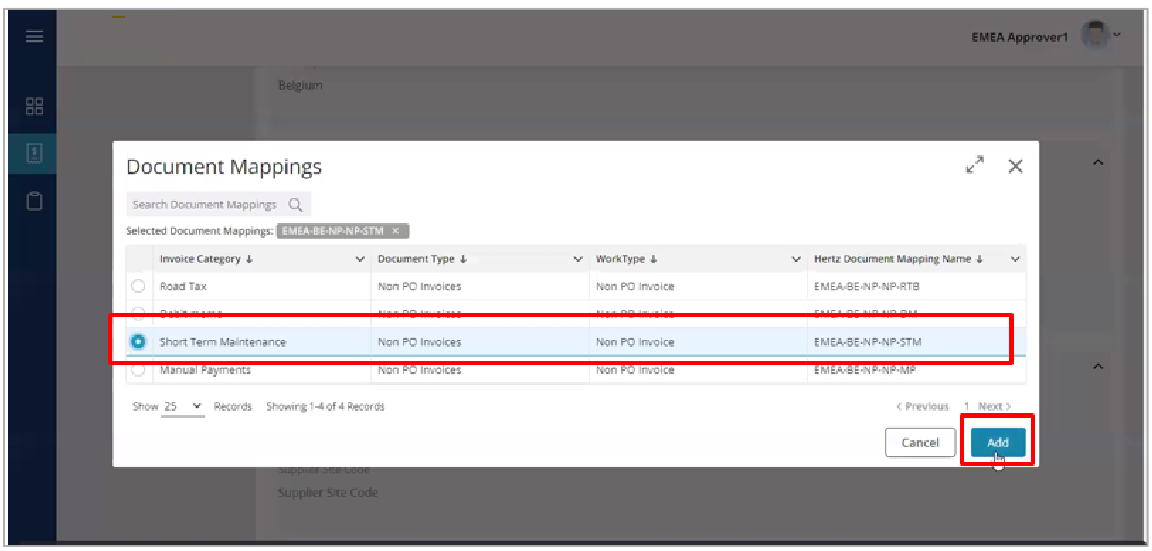
2. To create the invoice request, click the **Invoices** menu button on the left-hand side of the screen. Click the **+Invoices** icon.



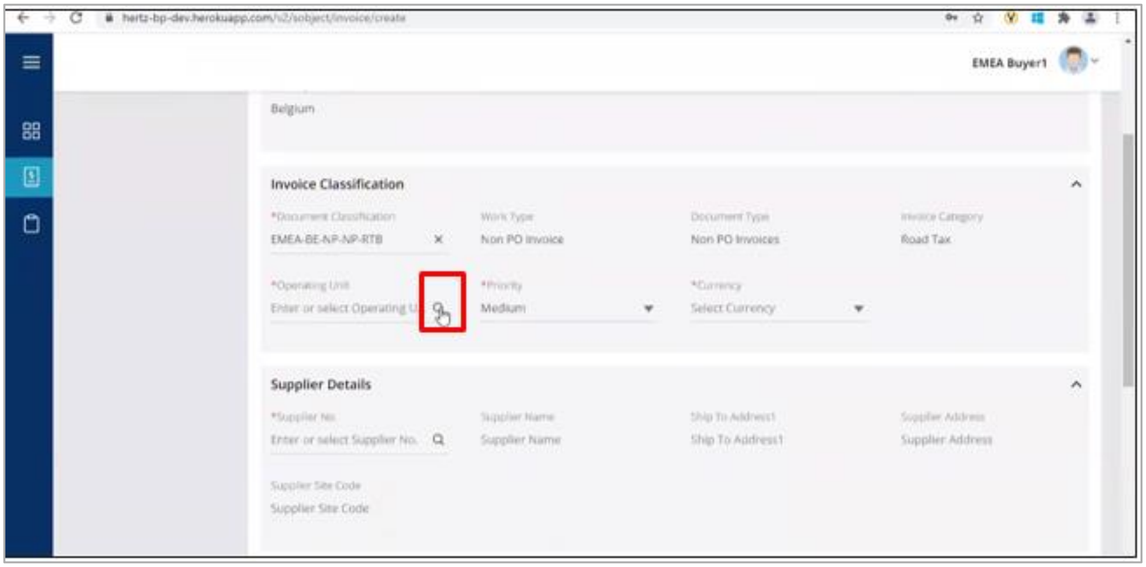
3. The **Create Invoices** screen appears. Scroll down to the **Invoice Classification** field box and click the search icon corresponding to the **Document Classification** field.



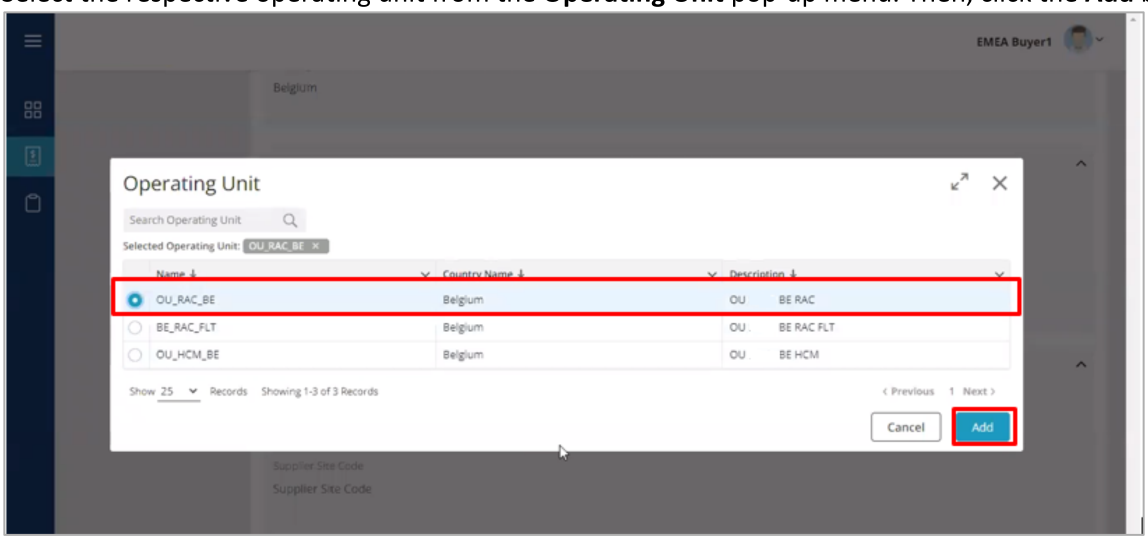
4. From the **Document Mappings** pop-up, select the type of invoice that needs to be created. Then, click the **Add** button.



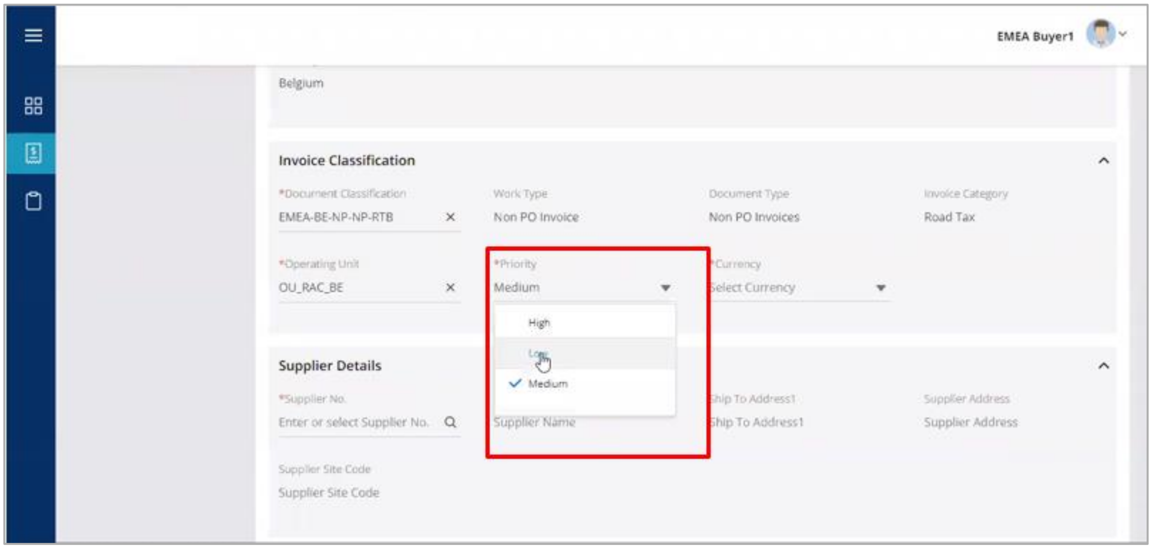
5. Under the **Invoice Classification** field box, click the search icon corresponding to the **Operating Unit** field.



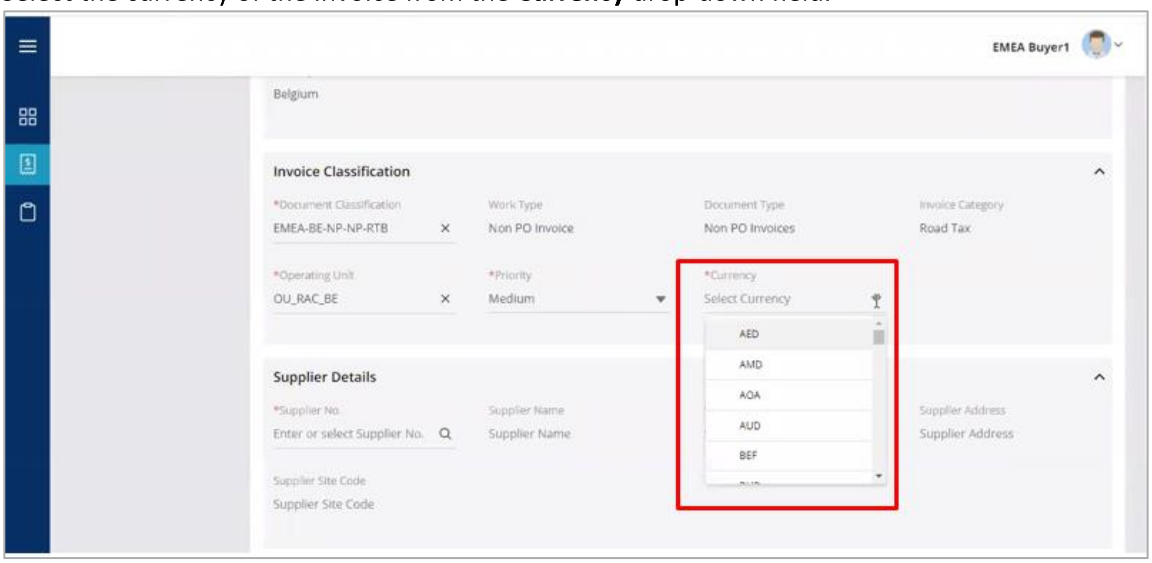
6. Select the respective operating unit from the **Operating Unit** pop-up menu. Then, click the **Add** button.



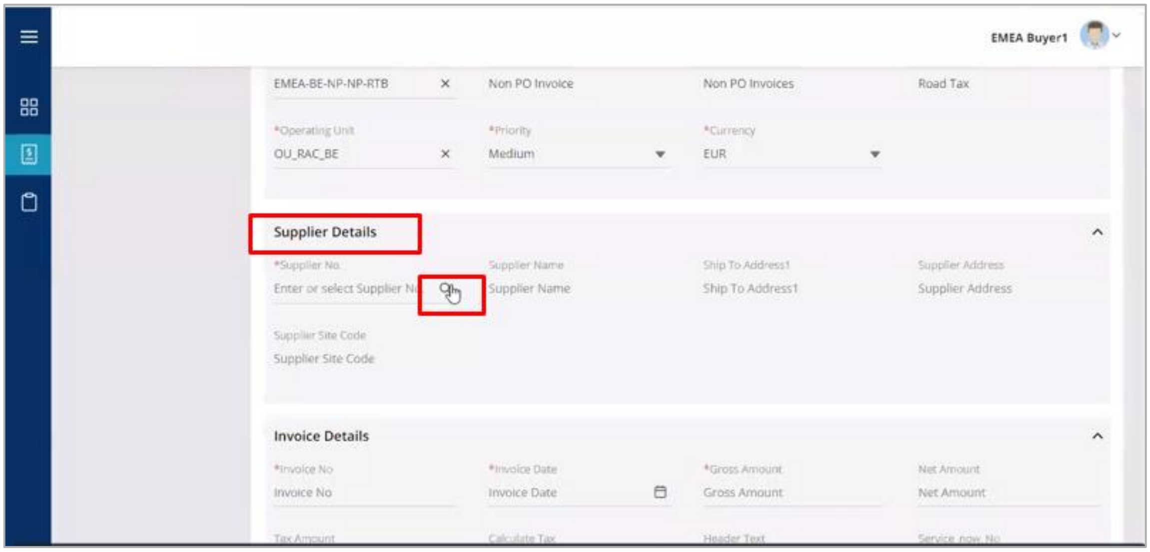
7. Select the priority of the invoice from the **Priority** drop- down field.



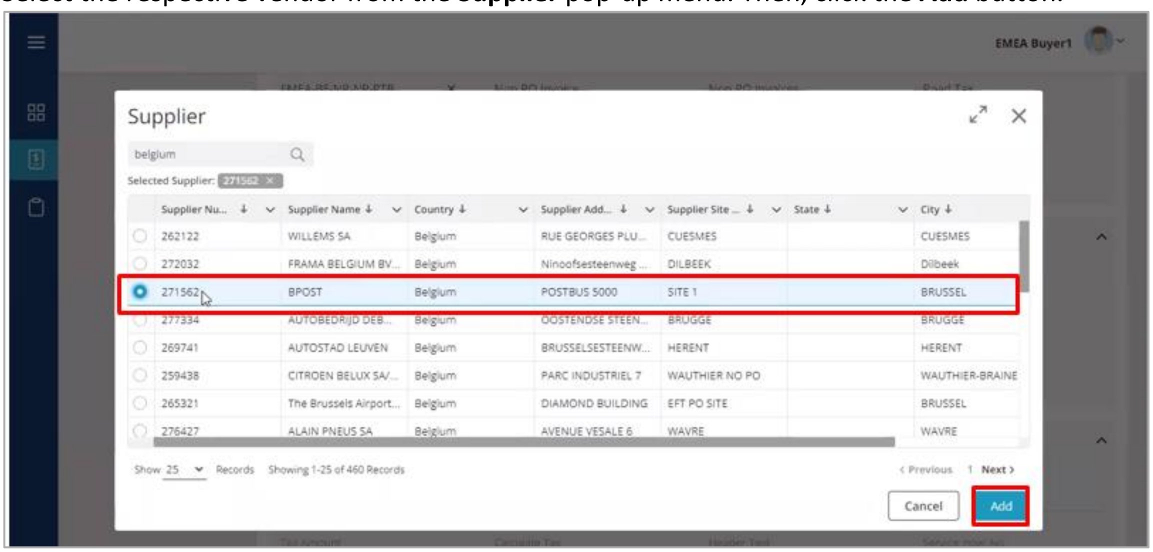
8. Select the currency of the invoice from the **Currency** drop-down field.



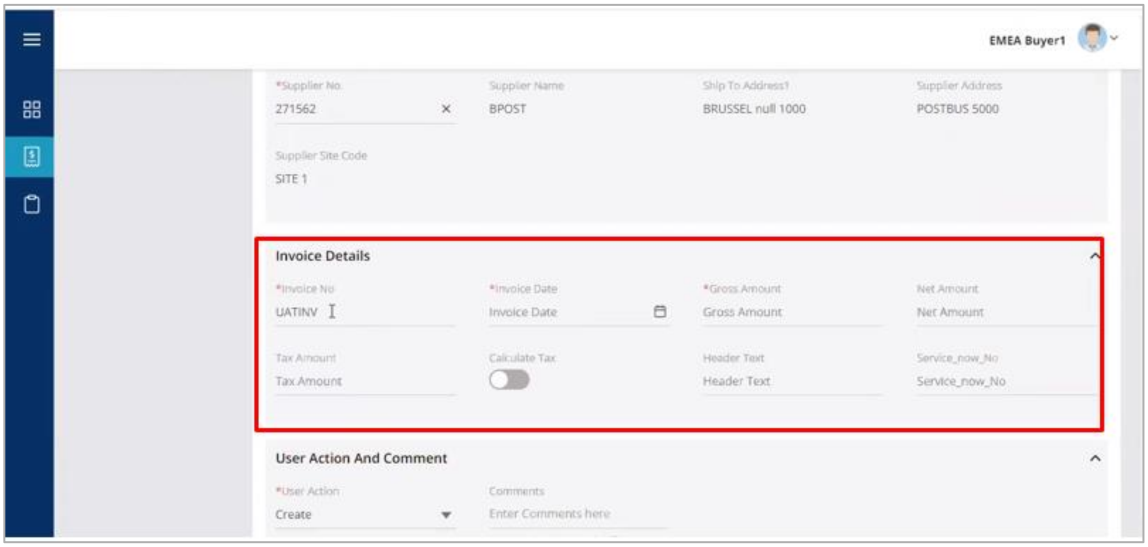
9. Scroll down to the **Supplier Details** field box. Click the search icon corresponding to the **Supplier No.** field.



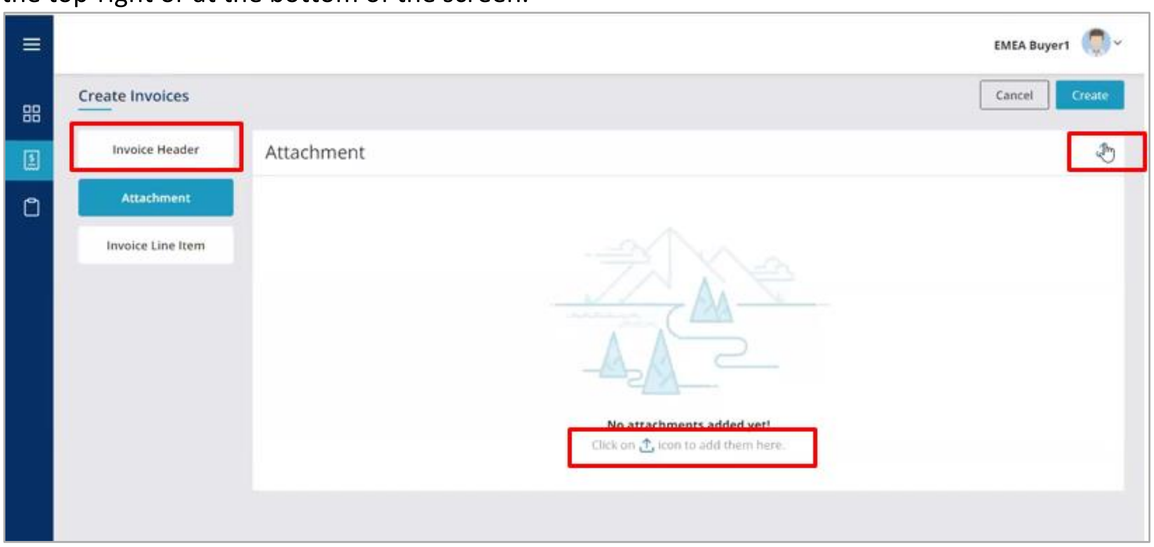
10. Select the respective vendor from the **Supplier** pop-up menu. Then, click the **Add** button.



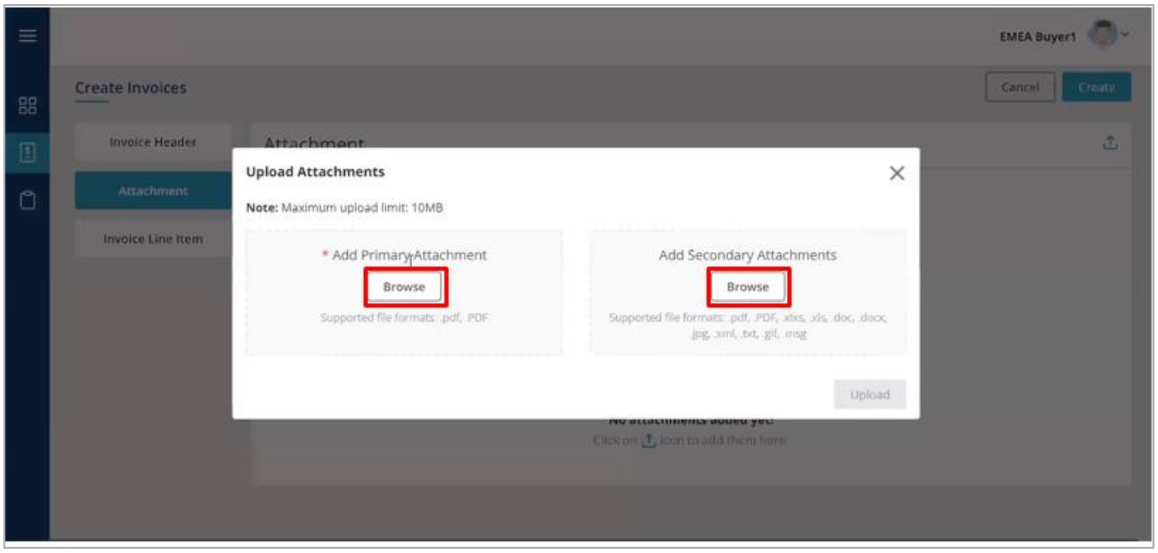
11. The vendor and their corresponding details get auto-populated. Enter the **Invoice No.** , the **Invoice Date**, the **Gross Amount**, the **Net Amount**, and the **Tax Amount** in their respective fields.
Note: All fields marked with the red asterisk are mandatory.



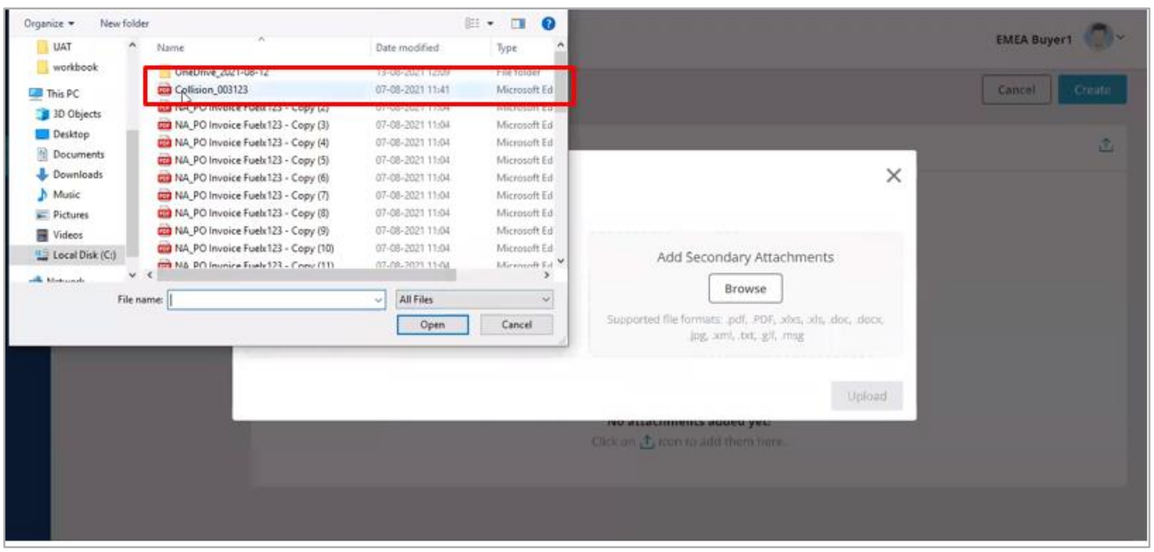
12. After filling in all the above details, click the **Attachment** tab on the top-left of the screen. Click the **Upload** icon on the top-right or at the bottom of the screen.



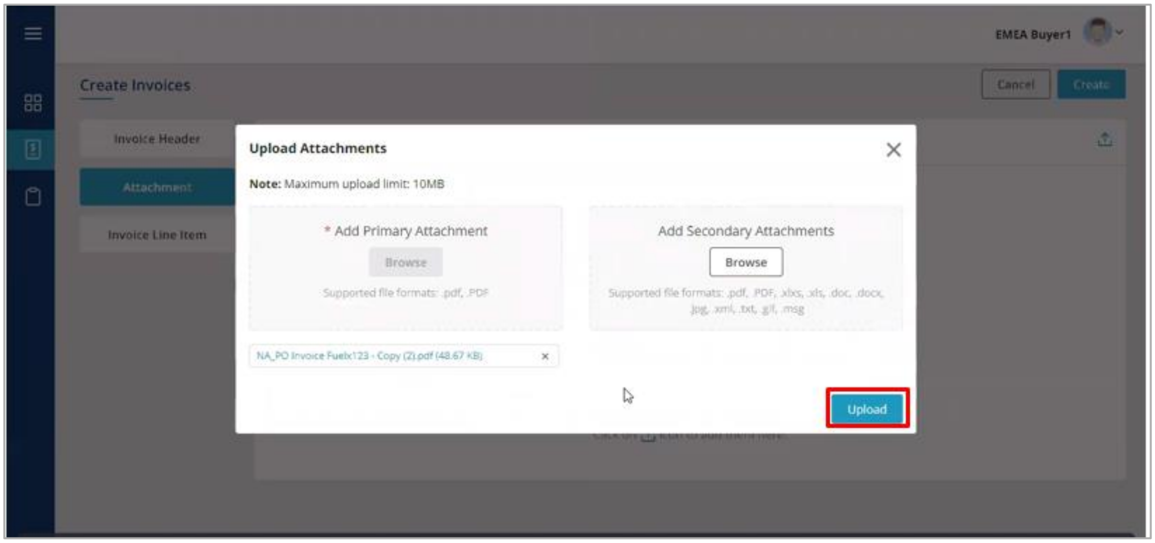
13. Select a supporting document by clicking the **Browse** button.
    Note: A supporting document can also be attached in the same manner.



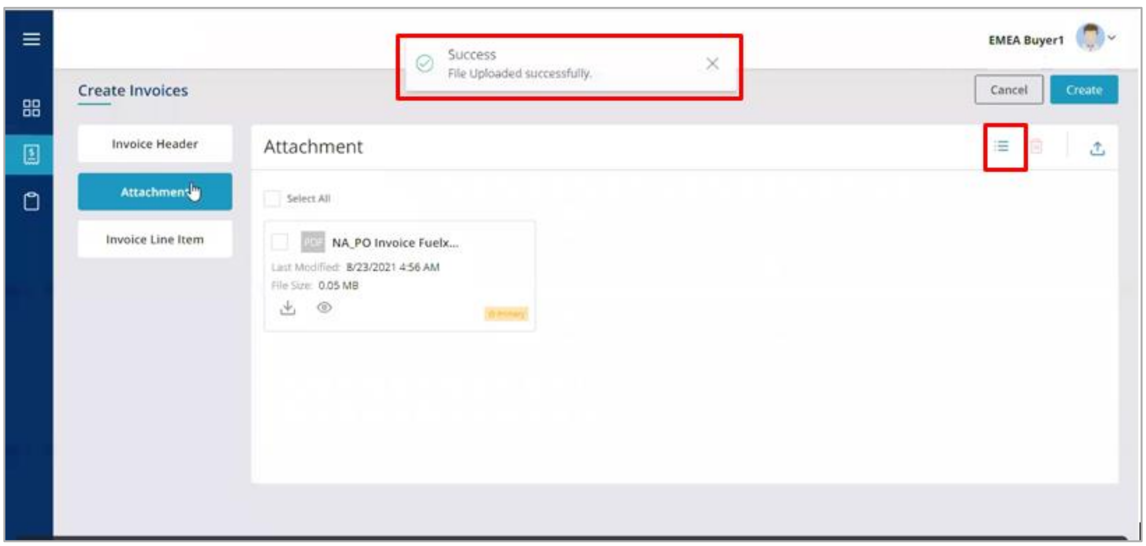
14. Select the required document in PDF format.
    Note: The maximum file size limit is 10MB.



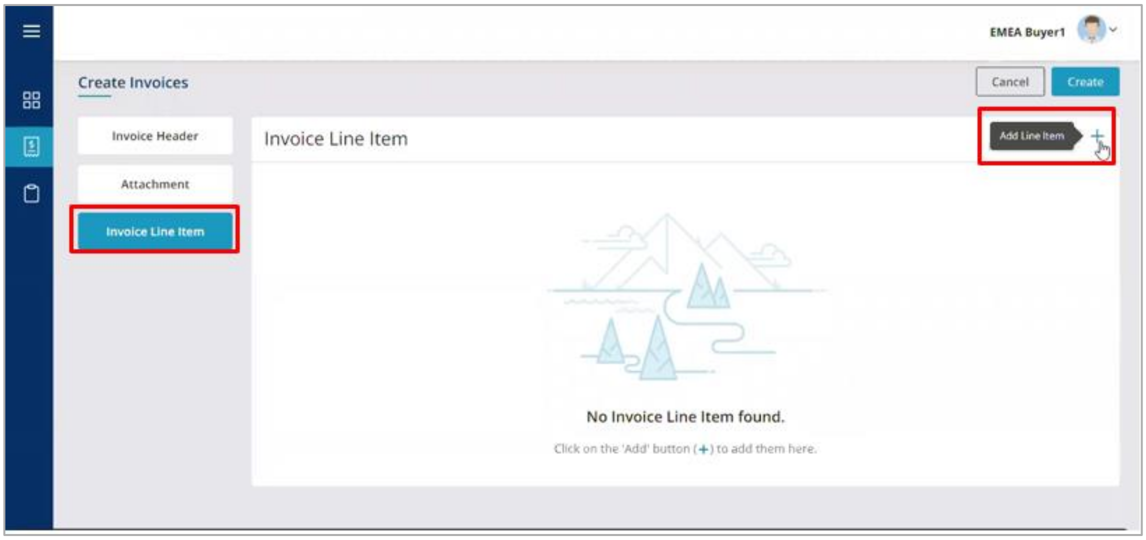
15. Click the **Upload** button.
Note: Up to 25 attachments can be uploaded for a single request. In case the required number of documents exceeds this number or the file size limit, the supporting documents can be attached on the shared drive. This link can be added in the **Comments** field in the request. These documents can also be sent via email.



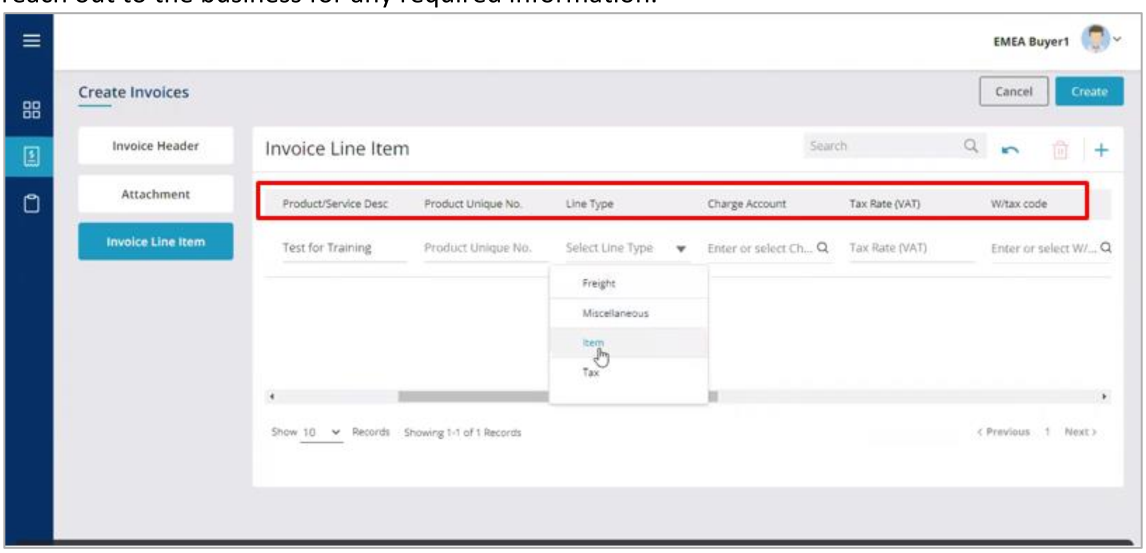
16. The invoice gets uploaded successfully. A message for the same is displayed on the screen.
Note: All the details of the uploaded files can be viewed by clicking the **Tabular** view icon. These files are also downloadable.



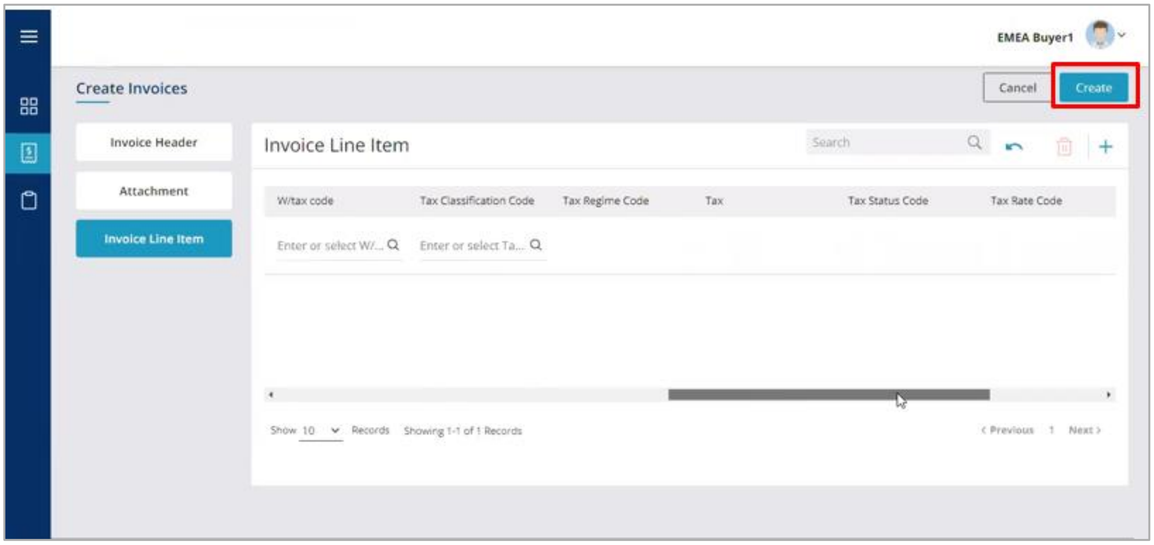
17. Click the **Invoice Line Item** tab on the left-hand side of the screen. Click the **Add line Item** icon to add any invoice line item details.



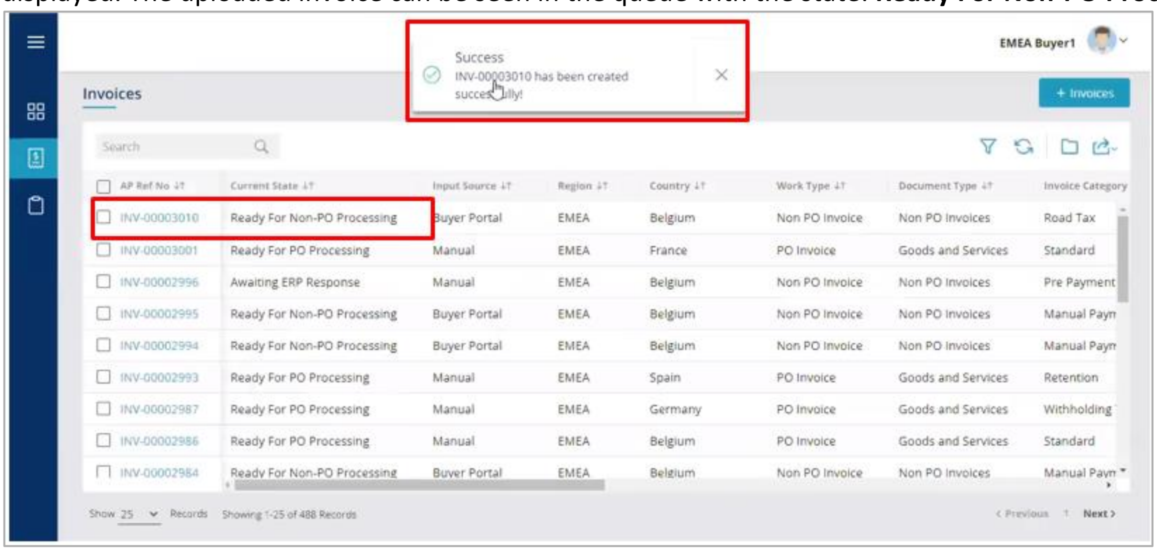
18. Enter the Invoice Line Item details, including the **Line no.**, **Amount**, **Product/Service Description**, **Product Unique No.** , **Line Type**, and others in their respective fields.
Note: Fields marked with a red asterisk must be filled in mandatorily. Entering the **Line Type** details is also essential for the invoice to be uploaded in the Oracle system. This reduces the turnaround time for invoice processing. In case this information cannot be provided, it will be filled in by the Genpact Operations team, who will reach out to the business for any required information.



19. Click the **Create** button on the top-right.



20. The invoice gets uploaded in the AP Cora tool to be used by the Genpact Operations team. A success message is displayed. The uploaded invoice can be seen in the queue with the state: **Ready For Non-PO Processing**.



This concludes the process of creating and uploading invoices in the Buyer Portal.