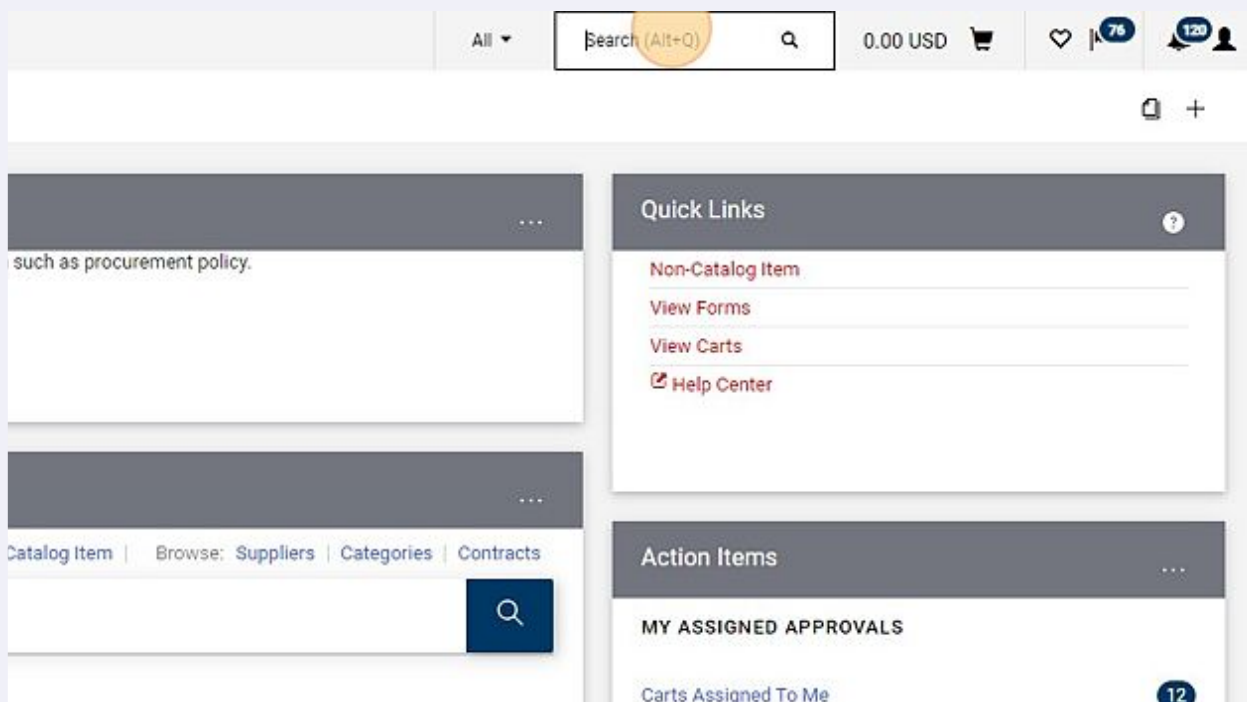


# How to attach an Invoice to a PO and Notify Accounts Payable (AP)

1 Navigate to Jaggaer

2 Use the Search field to search for the PO



### 3 Select the PO.

The screenshot shows a web application interface. At the top right, there is a search bar with the text "PJ000643" and a magnifying glass icon. Below the search bar, a dropdown menu is open, titled "Quick Search (Alt+Q)". The menu lists two categories: "Requisitions" with a value of "3775267" and "Purchase Orders" with a value of "PJ000643". The "Purchase Orders" entry is highlighted with a yellow circle. To the right of the main content area, there is a sidebar with a "View Forms" section containing "View Carts" and "Help Center" links. Below that is an "Action Items" section with "MY ASSIGNED APP" and "Carts Assigned To Me". At the bottom of the main content area, there is a navigation bar with links: "Go to: Favorites | Forms | Non-Catalog Item | Browse: Suppliers | Categories | Contracts".

### 4 Navigate to the Comments tab.

The screenshot shows the same web application interface, but now the "Comments" tab is selected and highlighted with a yellow circle. The "Document Status" section is visible, showing the following information:

A/P status	Open
Workflow	✓ Completed (5/16/2023 11:18 AM)
The system distributed the purchase order using the method(s) indicated below the last time it was distributed: <a href="#">view</a>	
Email (HTML Body)	office@nwengraving.com
Distribution Date/Time	5/16/2023 11:17 AM
Supplier	Sent To Supplier

To the right of the "Document Status" section, there is a "Details" section with the following information:

- Supplier Status
- Sent To Supplier
- Supplier
- NW Engraving Services LLC
- Total (500.00 USD)**
- Shipping, Handling, and Tax
- each supplier. The values s

5

Click the + button. Leave the "Show Comments For" drop down as "Purchase Order".

The screenshot shows a software interface with a top navigation bar containing 'All', 'Search (Alt+Q)', '0.00 USD', and a notification badge '76'. Below the navigation bar are tabs for 'Receipts', 'Invoices', 'Comments', 'Attachments', and 'History'. The 'Comments' tab is active, showing a 'Show comments for' dropdown menu set to 'Purchase Order'. A yellow circular button with a '+' sign and a 'New Comment' tooltip is positioned over the dropdown. To the right, a sidebar displays a 'Completed' status and 'Details' for a supplier: 'Supplier Status', 'Sent To Supplier', 'Supplier: NW Engraving Services LLC', and 'Total (500.00 USD)'. A note at the bottom of the sidebar states: 'Shipping, Handling, and Tax charges are calculated and charged to each supplier. The values shown here are for estimation only.'

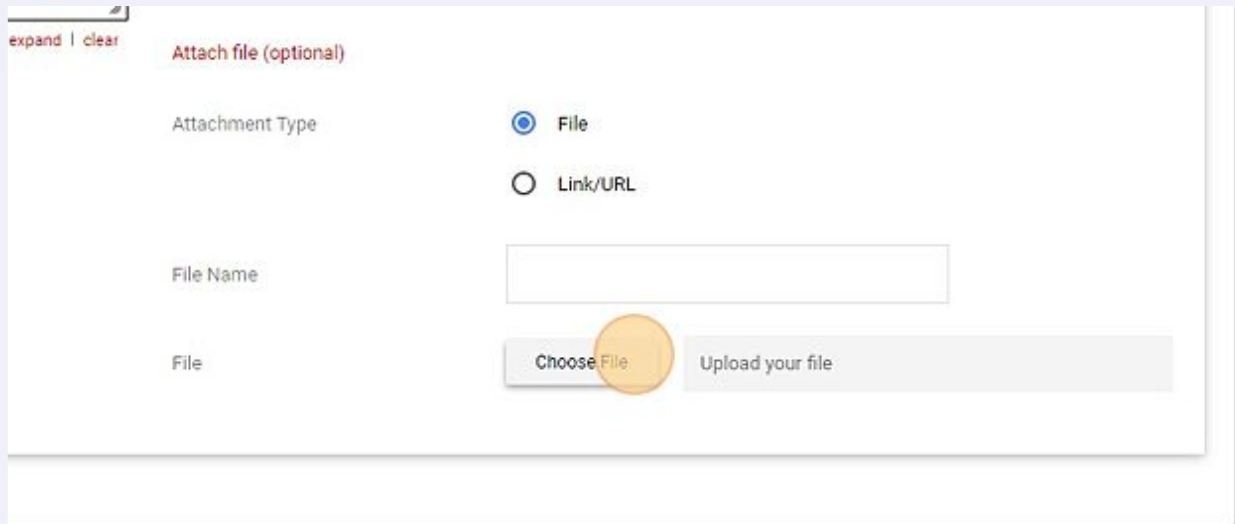
6

Enter a comment, such as "See Invoice".

The screenshot shows a software interface with a dark blue sidebar on the left containing menu items: 'Contracts', 'Accounts Payable', 'Suppliers', 'Reporting', 'Administer', and 'Setup'. The main content area displays 'Records found: 0' and an 'ADD COMMENT' section. This section features a large text input field with a yellow circular button in the center. Below the input field, it shows '1000 characters remaining' and 'expand | clear' options. To the right of the input field, there is a confirmation message: 'This will add a comment to the document. A comment has been added to the document.' Below this, there is an 'Email notification(s) | Add' section with a checkbox for 'Jessica Waddington'. At the bottom right, there is an 'Attach file (optional)' section with an 'Attachment Type' label and a 'File Name' input field.

7

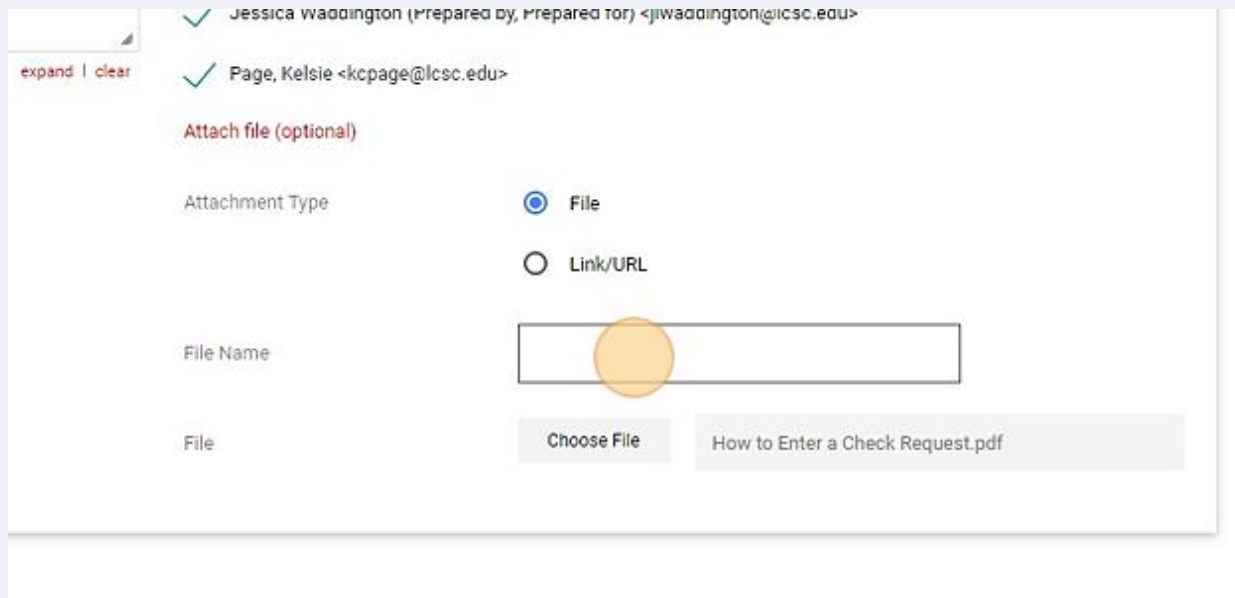
Click on the "Choose File" button to select the file from your computer to upload.



The screenshot shows a web form titled "Attach file (optional)" with a red header and "expand | clear" links. Below the title, there are two radio button options for "Attachment Type": "File" (selected) and "Link/URL". A "File Name" text input field is empty. At the bottom, there are two buttons: "Choose File" (highlighted with an orange circle) and "Upload your file".

8

Enter a file name, if desired. If nothing is entered, the name of the file that you selected for upload will be used.



The screenshot shows the same "Attach file (optional)" form, but now with two email addresses listed above the form: "Jessica Waddington (Prepared by, Prepared for) <jwaddington@lcsc.edu>" and "Page, Kelsie <kcpage@lcsc.edu>". The "File Name" text input field now contains the text "How to Enter a Check Request.pdf". The "Choose File" button is highlighted with an orange circle.

- 9 Click "Add recipient" to select Account Payable staff to notify.

This will add a comment to the document. If you select a user they will receive an email indicating that has been added to the document.

Email notification(s) | **Add recipient**

Jessica Waddington (Prepared by, Prepared for) <jlwaddington@lcsc.edu>

Attach file (optional)

Attachment Type

File

Link/URL

File Name

expand | clear

- 10 Enter the last name of the Account Payable staff.

**User Search** [X]

Last Name

First Name

User Name

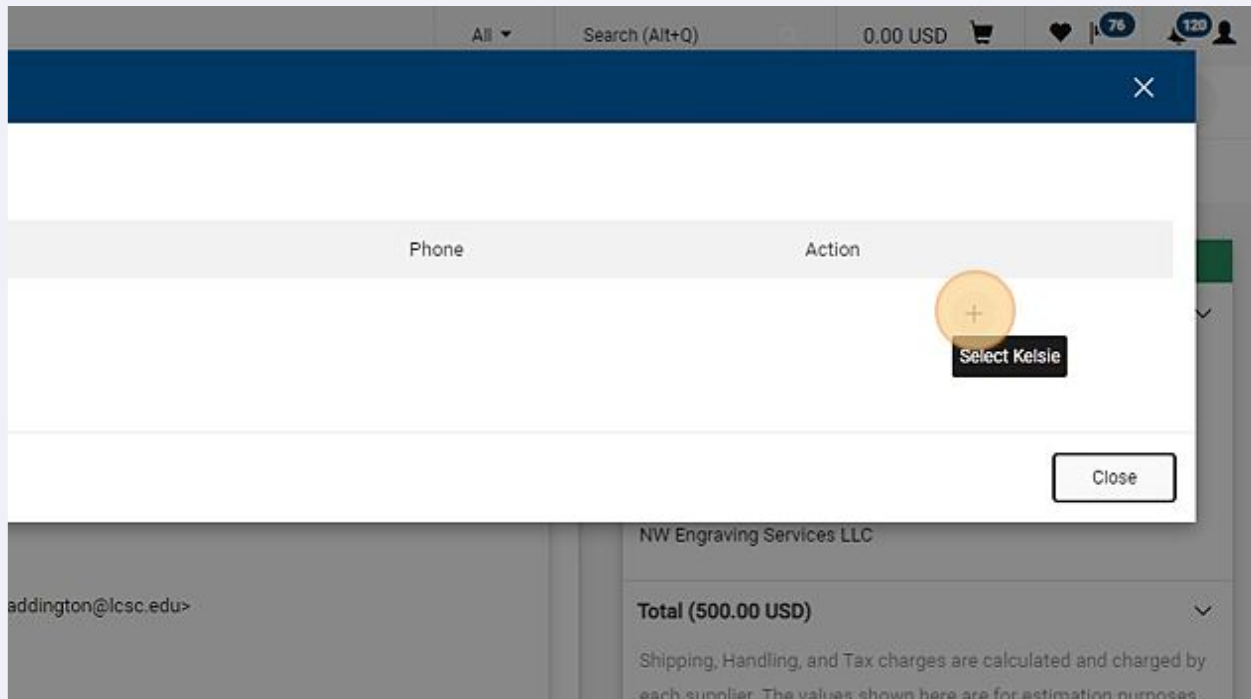
Email

Role

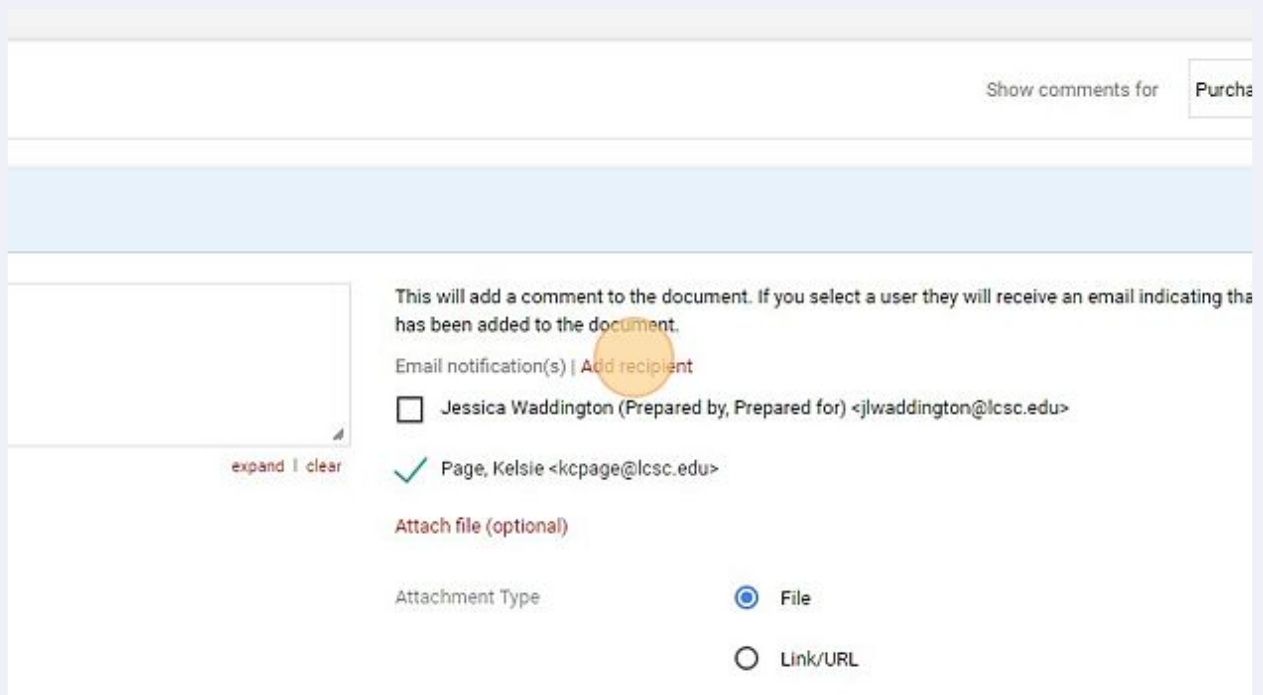
Results Per Page 10

expand | clear

11 Click on the + sign to select the user.

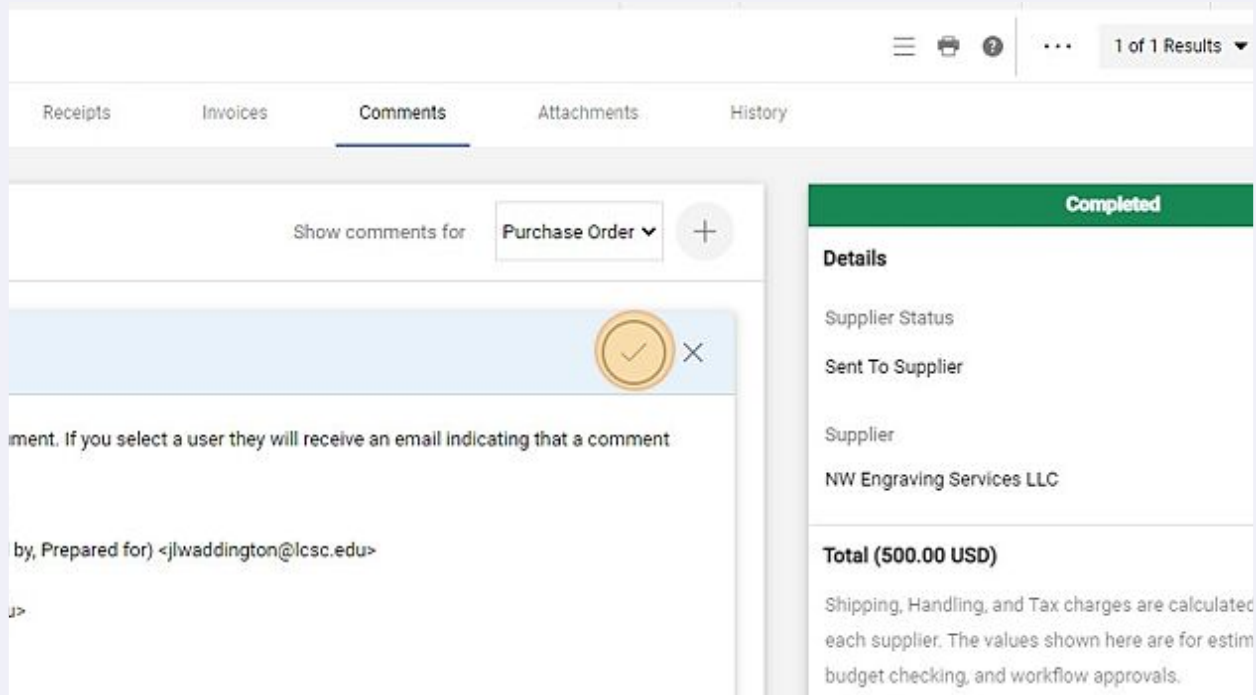


12 More than one person can be notified. Click "Add recipient" to add additional users, if desired.



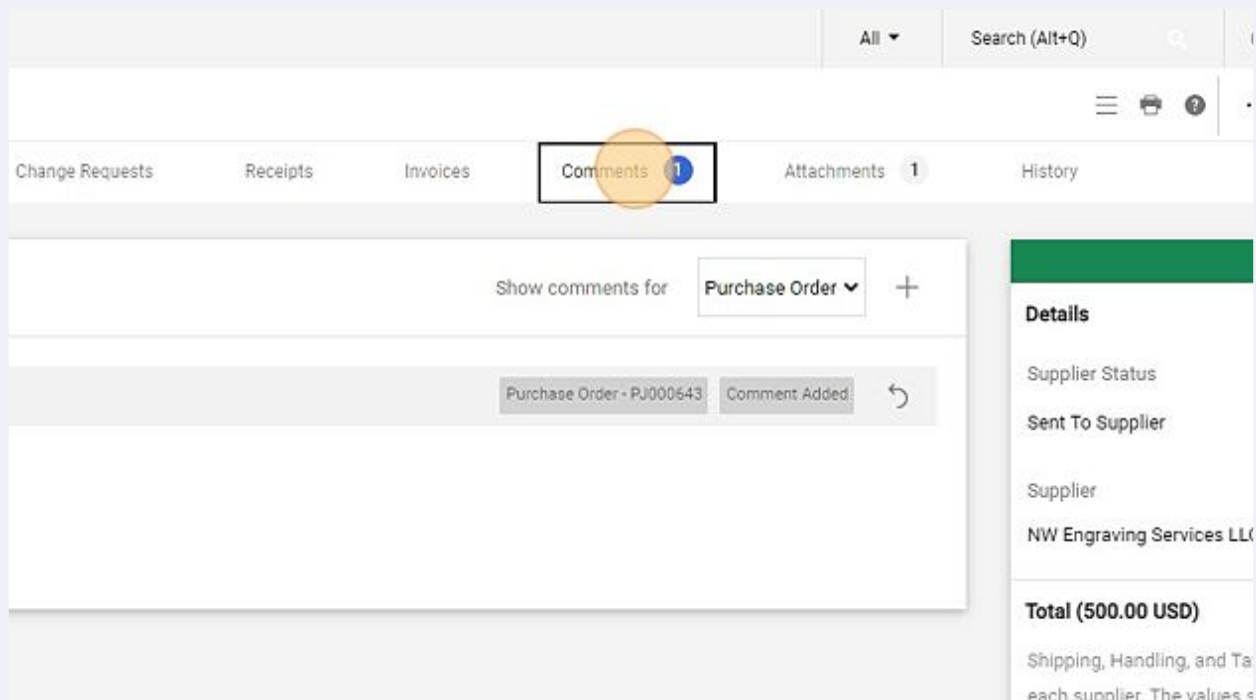
13

When the comments, attachment and users to be notified have been updated, click on the Check Mark icon to submit.



14

The comment will be saved in the Comments tab of the PO.



**15** The invoice file you selected will be saved in the Attachments tab of the PO.

The screenshot displays a software interface for managing Purchase Orders (POs). At the top, there is a navigation bar with options like 'All', 'Search (Alt+Q)', '0.00 USD', and a heart icon. Below this, a secondary navigation bar contains tabs for 'Receipts', 'Invoices', 'Comments (1)', 'Attachments (1)', and 'History'. The 'Attachments (1)' tab is highlighted with a red circle, indicating the current view. The main content area is divided into two sections. On the left, there is a 'Show comments for' dropdown menu set to 'Purchase Order' and a 'Purchase Order - PJ000643' comment added. On the right, a 'Completed' status bar is visible above a 'Details' section. The 'Details' section includes 'Supplier Status', 'Sent To Supplier', and 'Supplier: NW Engraving Services LLC'. Below this, a 'Total (500.00 USD)' is displayed, followed by a note: 'Shipping, Handling, and Tax charges are calculated for each supplier. The values shown here are for estimate'.