myUF Payment Solutions Best Practice Weekly Tips

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*Best Practices tips
Allocations vs. Line Items tabs – 2/17/16 (Menu)

Anytime you use the allocations tab you are paying invoices unencumbered:

The Line Items tab is where you match the PO for payment. Don’t see your PO? Add the PO number (leave all other fields blank) to the filter and search/save.
Reducing mouse clicks to match PO Line(s) – 2/24/16

*Purchase Orders will only populate the Matched header field automatically if the PO lines match the exact amount of the invoice sent into the system*

If you only have one line to match, there is no need to click the check box at the far right of the field as that is intended for selecting multiple lines. Simply click on the green circle check mark button and click OK on the confirmation pop-up.

If you need to pay from more than one line, click the check box for each line you need and click the green circle check mark button at the top of the Unmatched header (Click OK on the confirmation pop-up):

Now you are ready to edit the Invoice Qty and/or Unit Price for the PO line(s) if needed.
Is your PO attached to your invoice? – 3/2/16 (Menu)

There are two locations an invoice needs to have purchase order information.

1. The invoice header PO information helps provide the correct vendor remit information and allows you to search for invoices paid by POs in myUF Payment Solutions.

2. The Line Items tab at the bottom of an invoice is where the invoice pulls in payment information. You MUST have your PO line(s) matched in the Line Items tab to pay by PO. Using the allocations tab will pay the invoice using unencumbered funds.
Correcting Invoice Amounts – 3/9/16 (Menu)

If you have to pay an invoice that comes into MPS with a different amount than what needs to be paid, you can change the amount. You have to give it a short-pay reason (regardless of whether you are increasing or decreasing the amount) and save the invoice. The warning will still appear but the approval “check mark” will be available.
When sending invoices to myUF Payment Solutions using ufl@invoices.corcentric.com or uploading trailing documentation, please make sure the files you are sending/uploading have no special characters.

The majority of special characters present no problem but there are a few that can cause issues when they are uploaded to myUF Payment Solutions. Because of this, we ask that all special characters be removed from file names.

Examples of special characters: !@#$%^&*()_=+.",";

It is best to save short file names (ex: fisher13579.PDF)
Invoices submitted to ufl@invoices.corcentric.com take 24-48 hours to process, not including weekends. If it has been over 48 hours and you still don’t have your invoice use the search feature to search by invoice number, invoice amount, PO #, etc. Often times the invoice was already grabbed by another approver in your department or the invoice didn’t have the department ID/PO # clearly marked on the invoice image when it was sent in.

If you find your invoice in a search, click on the View Details icon to find where it is:

The top status for Activity Transitions will tell you who has the invoice and if it was approved or not.
For users that would like to work an invoice while keeping their inbox or search tab accessible, here is a method for doing that. BEFORE opening an invoice, right click on Search, Inbox or Out of Office. Select Open in new tab for IE and Open Link in New Tab for Firefox and Safari. Having three tabs open for Inbox, Search, and the invoice you are actively processing can be very helpful.

You can’t open a new tab if you are on the Processing Invoice page. You also can’t open a new tab using the Check Request tab.
Best Practices in the myUF Payment Solutions (MPS) system

1. Vendors should be submitting invoices via one of the 3 acceptable methods: eInvoicing, email or mail to Disbursement Services. If you are still receiving hard copy invoices, these should be returned to the vendor with instructions on the proper method of invoice submission.

   **Vendor Invoicing Instructions**

2. When matching invoices against purchase orders, do not match against 2 POs on the same invoice. This causes the nightly voucher file to have issues. Apply the total amount against one PO. The next day in myUFL…you can add the second PO and reallocate the amounts.

3. Credits are handled in MPS exactly like an invoice. That includes applying the voucher to a voucher to a PO. You are just entering a negative number instead.

4. The decline button looks different than it originally did. When you hover over it reads, “Ends the invoice process.” Please do not route vouchers to Disbursements to decline. You can decline them yourself with an explanation as to why you are declining.

5. Do not decline vouchers because they do not belong to your department. You can route those to Disbursements to determine where the voucher belongs. The vendor still needs to be paid.

6. When leaving voicemail messages with Disbursements, please speak slowly when giving us a number to call back. Many times we can’t understand the person speaking so quickly therefore we can’t call them back.

7. When leaving messages or sending e-mails, please give the information pertinent to the question. If you need help with a voucher, please provide the voucher number. If you need help with a PO, provide the PO number, etc. This expedites our ability to help you resolve the issue.

8. When looking up encumbrances in PeopleSoft Budget Details there is a box you can click to see only open encumbrances. This is the correct information regardless if it differs from Myinvestigator or the Open Encumbrance report. When budget checking happens Budget Details is the information it is looking at.
10. If your PO doesn’t show in the line items tab, try searching for it in the PO Filter box on that same tab. You will click on the pencil, enter the PO and then click the save button. The save button will be in the place of the pencil icon once that has been clicked. Make sure there is NO other information in the PO Filter box other than the PO itself. Try this before sending it to Disbursements. Sometimes that is all it needs.

11. If you right click on the search button on your inbox menu items you can “Open in a new tab.” This will allow you to work in multiple screens in MPS.

12. If you experience issues with the system, please try logging in again after clearing cache and cookies and closing your browser. Make sure you are using a supported browser version (provide link to the Help Desk MPS requirement page).

13. To see why you can’t approve an invoice, hover over the Approval button. A message box will display with information listing why you can’t approve.

14. Purchase orders distributed by quantity and set with a quantity of one will only allow users to pay one invoice. Please make sure the quantity reflects the correct/expected invoice volume when creating a PO distributed by quantity.