Working Returned Invoices

Overview

This guide will show you how to access and edit Returned Invoices.

Navigation

Within myUFL, navigate to:
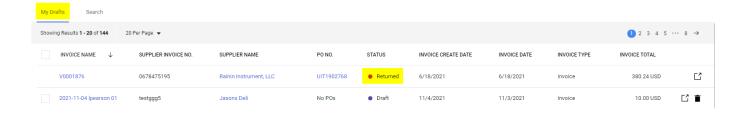
⇨ Nav Bar
⇨ Main Menu
⇨ My Self Service
⇨ myUF Marketplace

Process

Invoices will return to the Invoice Owner if they fail invoice validation due to insufficient budget or an invalid chartfield combination. Returned invoices are sent to the draft invoice folder of the Invoice Owner listed on the invoice. For invoices that have a PO, the default Invoice Owner is the "Prepared by" user that started the requisition. Invoices can also be returned by another user in the invoice workflow. Since returned invoices are considered draft invoices, they are not searchable in the system until they are submitted back into workflow. **It is best practice to make yourself the invoice owner for all invoices you complete; If there is an issue with the invoice, it will return to you as the invoice owner (See last screenshot on page 2 for location to change Invoice Owner)**

Navigate to Returned Invoices:

1. Click on **Accounts Payable icon**.
2. Click **View Draft Invoices**.
3. Any returned invoices will populate in My Drafts with a **Returned** status.
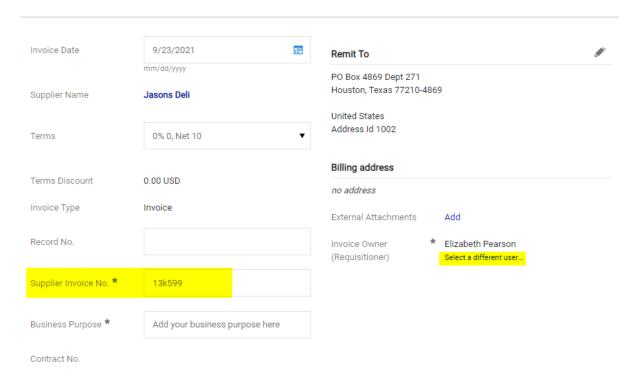4. Returned invoices can be edited by clicking on the invoice number hyperlink.

	INVOICE NAME ↓	SUPPLIER INVOICE NO.	SUPPLIER NAME	PO NO.	STATUS	INVOICE CREATE DATE	INVOICE DATE	INVOICE TYPE	INVOICE TOTAL	
	V0001876	0678475195	Rainin Instrument, LLC	UIT1902768	● Returned	6/18/2021	6/18/2021	Invoice	380.24 USD	⬡
	2021-11-04 lpearson 01	testggg5	Jasons Deli	No POs	● Draft	11/4/2021	11/3/2021	Invoice	10.00 USD	⬡ 🗑

My Drafts   Search

Showing Results 1 - 20 of 144   20 Per Page ▼   1 2 3 4 5 ⋯ 8 →

- After a returned invoice has been updated, it can be submitted back into workflow by clicking the **Complete** button.
  - *invoices re-submitted into workflow will go through the same approval process to allow for review on any changes made.*

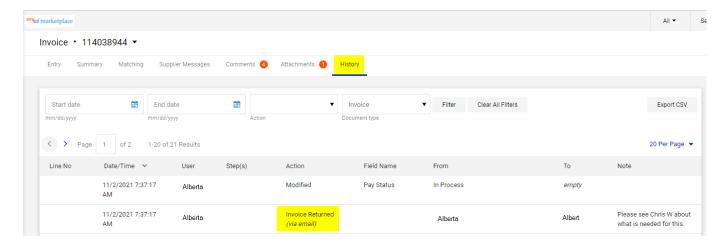Complete: By Clicking This Button, You Acknowledge Receipt Of Goods And Services On Behalf Of UF

- Returned invoices cannot be deleted or removed from the **View Draft Invoices** page.
  - Any purchase orders listed on invoices that need to be canceled in the system need to be removed and a non-po line added. The Invoice Owner can then submit the invoice back into workflow as a non-po invoice. The Department level 2 approver can then reject/cancel the invoice.
- Invoice Owners will need to edit the Supplier Invoice Number prior to rejecting/canceling an invoice so a newly created invoice will not be listed as a duplicate.

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Where do I go to find out why _____ *was* _____

Navigate to the history tab, located in every invoice. If an invoice has been returned, under the Action column, it will either show "Invoice Returned (via email)" or "Invoice Returned (via system)". Invoices that are returned by the system will also provide a reason; The most reasons are due to an invalid chartfield or budget issue.

Additional Assistance

Marketplace Help Desk

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