Create an Invoice from a Purchase Order (U.S.)

This help guide will walk you through the steps for creating an invoice from a purchase order in myBuy and submitting it for payment.

Flip Order to Invoice

You’ll first begin with flipping an order to an invoice:

1. Click the Purchasing module
2. Click the Order tab
3. Click on the Order for which you want to create an invoice. Check the Order Status (it must be Supplier Acknowledged in order to create an invoice), then open the order you wish to invoice by clicking on the title of the order.
4. Once the order is displayed, scroll to the bottom & click Create Invoice then OK to proceed

Add Basic Details

1. Review and edit the Invoice Name if necessary
2. Enter the Invoice Total Amount
3. Enter the unique Invoice Number generated from your system
4. Review and update the Supplier Invoice Date, if necessary (note: invoice payment is based on the date you submit the invoice via myBuy GEP SMART)
Review Line Details

1. Select or deselect a line item by clicking on the Check Mark
2. Update Unit Price or Quantity if needed to match what you are invoicing

3. Select the line you want and slide right to enter the Tax Rate
4. Taxes will be automatically calculated; verify/update the Actual Tax Amount
5. Enter Other Charges and Freight (if applicable). Note: freight charges cannot be added on service line items. If freight needs to be included, add to Other Charges field

6. Add any Discount that may apply
Confirm Bank Details

1. Click Please Select
2. Click drop-down arrow in the Payment Method field to view bank records (scroll right to see account number and information)
3. Click the check mark next to the applicable record of the account you want to receive the payment. (note, you have the option to select a default bank account by location in your supplier profile; see the myBuy GEP SMART User Guide for more details)
4. Click Done
Review Additional Details

1. Add the Date of Supply or Service Start Date (if applicable) from the calendar drop-down
2. Add the Date of Supply or Service End Date (if applicable) from the calendar drop-down

Add Comments or Attachments

1. Click the Comments button in the top right corner and either add comments or attach documents. You are required to upload a copy of your company-generated invoice with details about the goods or services you are invoicing that can be helpful for Roche / Genentech buyers in reviewing and approving invoices. And, you may add any other comments or documentation you think would be helpful, such as timesheets for services.
Submit Invoice

When all required fields are completed, click Submit

1. Click Yes to confirm what you are processing
2. Click OK to clear the success pop-up box

Keep in mind:
- Electronic invoices created in myBuy GEP SMART are legally valid documents.
- If you choose to submit invoices via email, do not also submit them via myBuy GEP SMART. Our ERP system will recognize that as a duplicate invoice scenario, and processing will be delayed while the issue is resolved.

Download Legal Invoice

When you need to download a copy of the legal invoice for your records:

1. Click on the Invoice module and open the invoice you want to download
2. Click on the More menu in the top right corner, then click Download Legal Invoice

Invoices will download in JSON (text) format
Check Invoice Status

You can quickly check the status of your invoices:

1. **Select the Invoice module**
2. **Click the Invoice subtab**
3. **Look for the status column** for each invoice to check the invoice’s status