

# **OFFICE OF THE CONTROLLER**

## **General Accounting – Accounts Payable Team PO Processing**

**April 2025**





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# PO Invoicing



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# PO Invoices

Purchase Orders issued through PeopleSoft will require an invoice for payment and receipting in the system. Invoices are typically received in the department and should be forwarded to Accounts Payable immediately upon receiving. If the Purchase Order requires receipting in the system, this should be done immediately upon receipt of the goods in order to not delay payment.



# PO Invoices

- Most invoices exceeding \$10,000 must flow through the Purchasing Department's PO process. See [Payment Request Matrix](#) for reference.
  - Multiple invoices to a supplier for the same project, purpose or service that exceed \$10,000/year in aggregate require a PO and cannot pay through Payment Request.
- Must be set up as a Supplier in the Supplier Portal
- Purchase Order invoices received by Accounts Payable must contain a valid PO number and invoice number for processing. Invoices received by the departments should be forwarded immediately to Accounts Payable to avoid delays in processing.



# Procedure to Pay Process

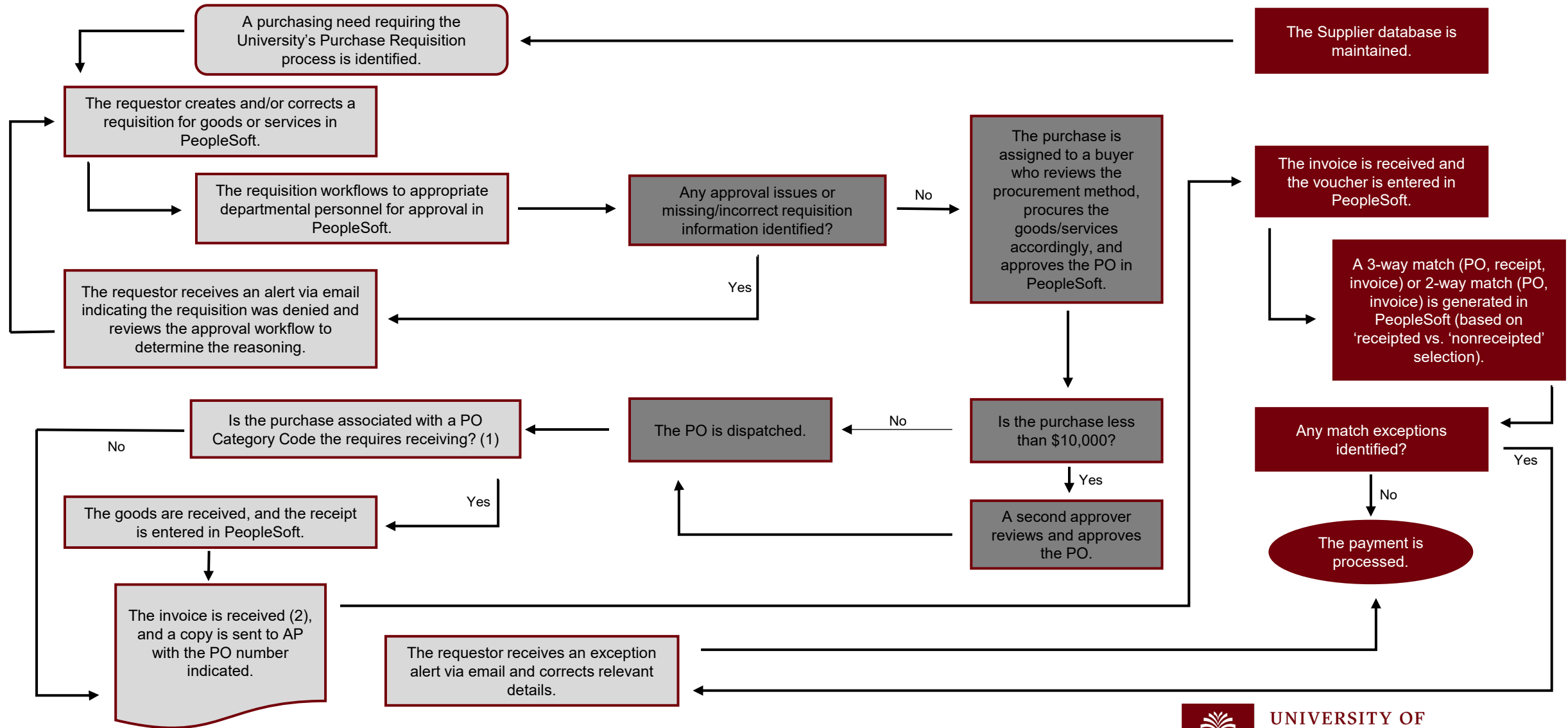


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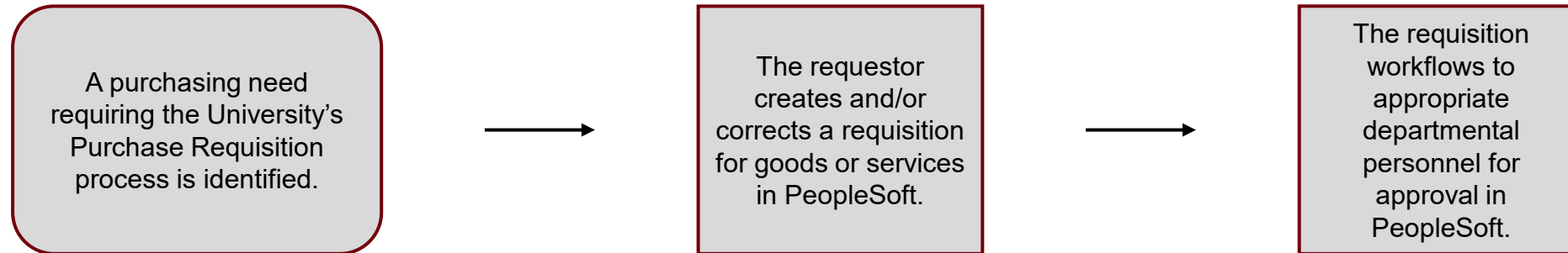
# Requesting Department

# Purchasing Department

# Controller's Office



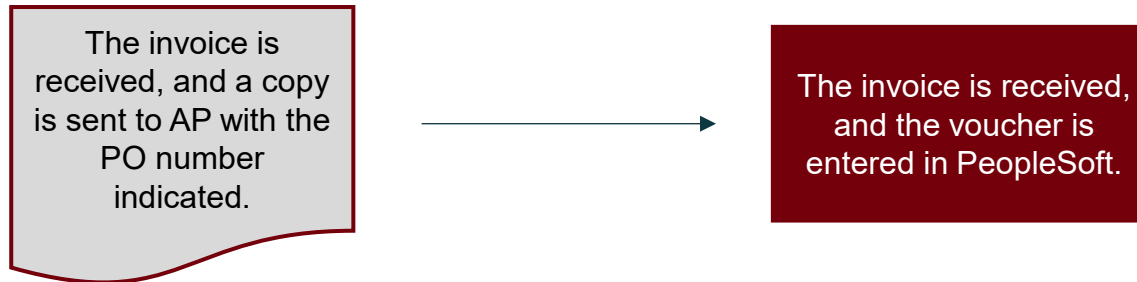
# PO Invoices



- To initiate a PO, the department must complete a requisition in the system, which will flow through an electronic workflow approval before the PO is dispatched. Using the requisition ensures that all appropriate authorizations are obtained, and sufficient funding exists for the purchase.
- In addition, these goods and services must be procured in accordance with statutory competitive solicitation processes, which are also facilitated by the Purchasing Department.



# Department Perspective



- If an invoice is received without a valid PO number and valid invoice number, it will be returned to sender for correction before being processed for payment.
- The invoice can also be sent directly to the Controller's Office by the vendor. Also, in some instances, the invoice is received prior to the goods.
- Sending in the invoice will be Accounts Payable's cue to make payment.

# Receiving

The invoice is received and the voucher is entered in PeopleSoft.

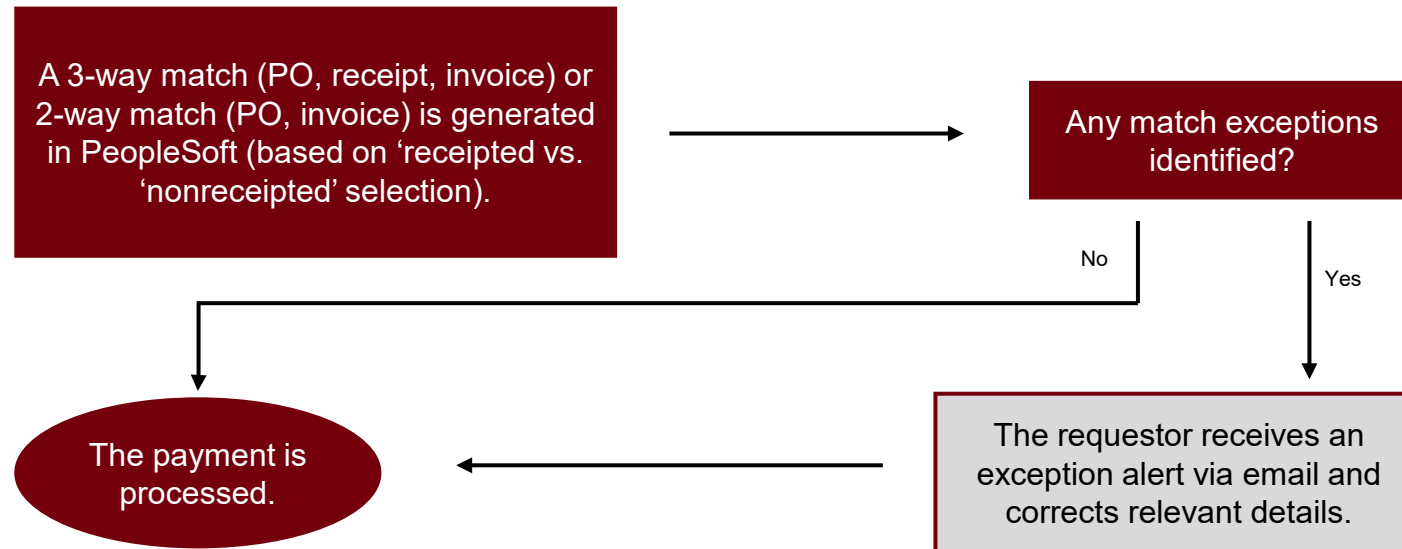


A 3-way match (PO, receipt, invoice) or 2-way match (PO, invoice) is generated in PeopleSoft (based on 'received vs. 'nonreceived' selection).

- Receiving in PeopleSoft is an important part of the 3 Way Matching rule within PeopleSoft. It compares vouchers with purchase orders and receiving documents.
- 3 Way Matching is a control measure used to ensure that you pay for only the goods and services that you order and receive
- Receipting is required on all purchases of goods. In addition to an original invoice, dispatched POs require receipting, if applicable, and matching in the system before payment occurs. Receipting will be completed immediately upon the receipt of goods and/or to avoid payment delays.
- Matching occurs when the receipted amount is less than or equal to the line amount.



# Receiving



- Receiving your requested goods is the trigger for Accounts Payable to pay and how much to pay
- If the lines on the Purchase Order, Receipt, and Voucher do not match, payment will not be made.



# Effect of a Category on Receiving Required

Services do not require receiving. For example, maintenance or repair of equipment



Goods require receiving. For example, supplies and equipment



# Receiving

- Use the Purchase Order Inquiry page to view purchase order information. This page can help determine the type of PO (Amount or Quantity) you have and whether Receiving is required
- Navigation: **Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders**

The screenshot shows the 'Purchase Order Inquiry' page in a web browser. The breadcrumb trail at the top reads: 'Favorites > Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders'. The page title is 'Purchase Order Inquiry' with a subtitle 'Find an Existing Value'. Under 'Search Criteria', there is a search bar and two dropdown menus for 'Recent Searches' and 'Saved Searches'. Below these are several search criteria fields:

- \*Business Unit: = [v] USC01 [Q]
- PO ID: begins with [v] [ ]
- Contract SetID: begins with [v] [ ] [Q]
- Contract ID: begins with [v] [ ] [Q]
- Release Number: = [v] [ ]
- Purchase Order Date: = [v] [ ] [Calendar icon]
- PO Status: = [v] [ ] [v]
- Short Supplier Name: begins with [v] [ ] [Q]
- Supplier ID: begins with [v] [ ] [Q]

# Resources & Contacts



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## Office of the Controller

## Office of the Controller

## General Accounting

## Accounts Payable

Capital Assets

Chart of Accounts

General Ledger

Moving and Relocation

Travel

Treasury Management

General Accounting Staff Directory

Grants and Funds  
ManagementCompliance and Tax  
Management

## Payroll Department

Operational Management  
and ReportingExternal Financial Reporting  
and TransparencyResource and Training  
Toolbox

## Contact Us

## Accounts Payable

Accounts payable is responsible for the review and disbursement of funds in accordance with university policies and procedures.

## Accounts Payable Services

Our staff processes invoices from external suppliers as well as all non-payroll payments to faculty and staff.

## AP Uploads

Expand all



## Cash Advances



## Employee Reimbursement (non-travel)



## Expense Module Correction Form



## Independent Contractor vs. Employee Classification



## Journal Vouchers



## Payment Request



## Payments to Individuals (Honorariums and Stipends)



## Purchase Order Invoices



## Royalties



## Student Reimbursement

Contact Accounts  
Payable

For questions about any Accounts Payable services, please contact us directly:

1600 Hampton Street, 6th floor  
Columbia, SC 29208

Email: [ap@mailbox.sc.edu](mailto:ap@mailbox.sc.edu)

# Where to Find the Resources

For accounts payable resources, visit the [Accounts Payable](#) page in the General Accounting section.



## Office of the Controller

Office of the Controller

General Accounting

Grants and Funds Management

Compliance and Tax Management

Payroll Department

Operational Management and Reporting

External Financial Reporting and Transparency

Resource and Training Toolbox

**Business Manager**

Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

PeopleSoft Finance Training Schedule

Listserves

Social Media

Contact Us

### Business Manager

The role of each Business Manager at the University of South Carolina varies across each college and department. Each Business Manager handles several responsibilities that directly influence the success of their departments and the University overall. They provide business expertise on a variety of topics including, but not limited to budget, expenses, supplier onboarding, transaction corrections, and University policies and procedures.

Below is a list of tasks a Business Manager may be responsible for within their college/department. Sections include links to training resources that support each task.

**Note:** Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below.

**Account Funding Change**

Expand all



**AP Uploads**



**Business Expense Prepaid Cards**



**Cash Advances**



**Cost Transfer**



**Departmental Deposits**



**Employee Reimbursement (Non-travel)**



**Endowments**



**Finance Intranet**

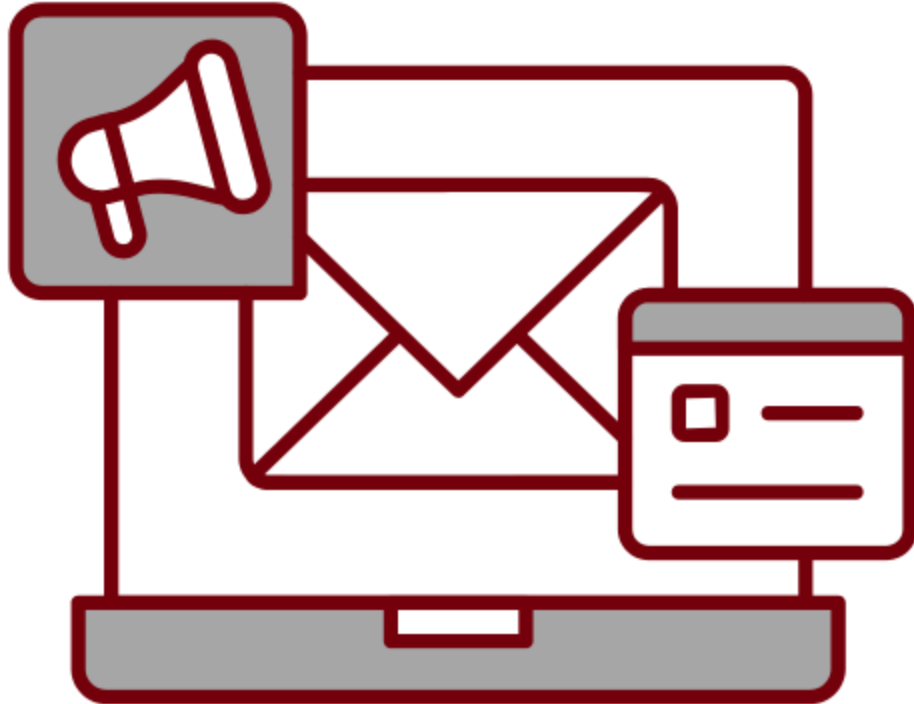


# Where to Find the Resources

For more training resources, visit our [Business Manager](#) page.



# Contact Us



For specific questions, please visit our [website](#) to find the appropriate contact.



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# Questions



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# THANK YOU!

## Office of the Controller



Alone, we can do so little; together,  
we can do so much.



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Columbia, SC 29208



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**Email Address:**

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