VOYA FINANCIAL®

Job Aid: Create and Submit a PO-Related Invoice

This job aid provides step-by-step guidance for creating, editing and submitting a Purchase Order (PO)-related invoice in the system. Follow the instructions below to ensure accuracy and successful submission.

If you encounter any issues during the process, please contact **procurement@voya.com** for assistance.

- Open your Chrome/Edge browser

- Access [Are you currently a Voya supplier? | Voya.com](#) with your **User ID** and **Password**

Once you are into Voya screen select the second point link "Use your user ID and password to access."

Are you currently a Voya supplier?

Welcome Voya suppliers!

- Review the Voya Supplier Portal Terms and Conditions (download PDF) 📄.
- Use your user ID and password to access the Voya Supplier Portal (opens new window) ⧉.

Sign In
Oracle Applications Cloud

User ID

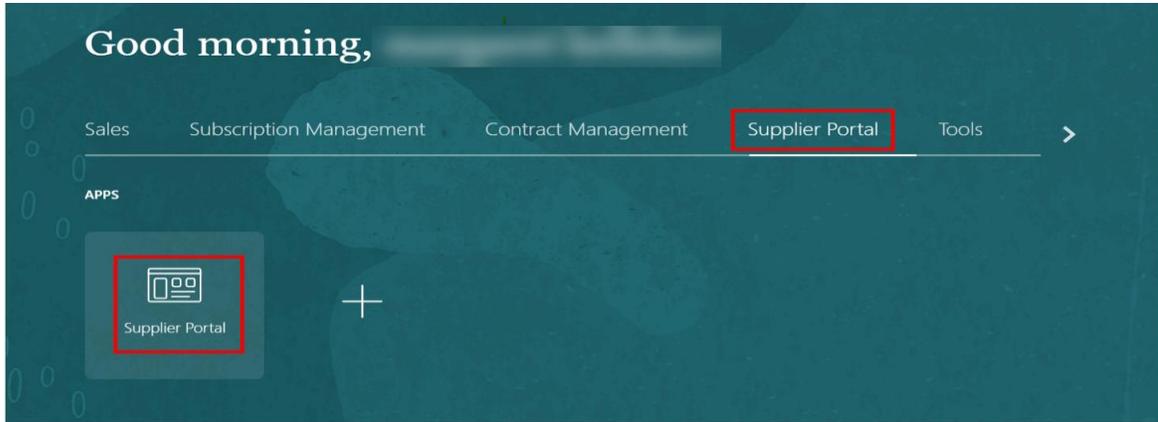[User ID]

Password

[Password]
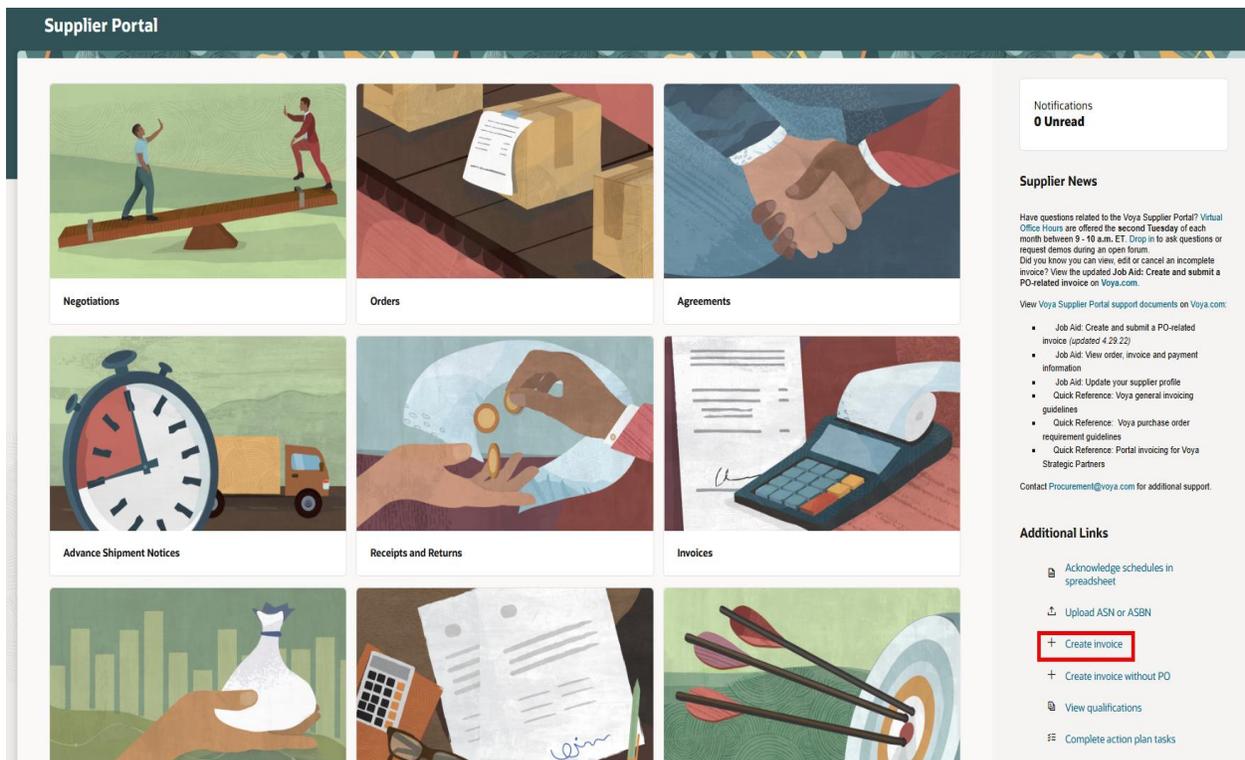
Forgot Password

[Sign In]

Select Language

[English ▾]

Go to the **Supplier Portal,** and within the **Apps** section, click on **Supplier Portal** to continue.

Choose **Create Invoice**

Please select the correct Purchase Order from the dropdown menu for your invoice. If you do not have a PO number, kindly contact your Voya business partner to obtain the required details.

Once you select the PO number, The corresponding address will auto-populate. Please select the appropriate supplier site from the dropdown menu based on the Remit/Check-to address shown on your invoice

• Enter the invoice number for the invoice you are submitting as per the invoice copy.
• Enter the invoice date as per the invoice copy. (Note: The date must be a past date and cannot be later than today).
• The document type defaults to "Invoice." Credit memos may also be submitted.
• Click the "+" icon under Attachments to upload a copy of the invoice.
Invoices submitted without an attachment will be rejected.

• Optionally, enter a description for the attachment.

• After uploading, click OK to confirm the attachment.

• In the Lines section, select the "Select and Add" option to proceed.

Lines

• Highlight the row that corresponds to the correct PO number.

• Click OK to confirm your selection.

• To add a **second PO** and include additional lines, click the "Select and Add" option.

• Click the "Purchase Order" dropdown and select the alternate PO.

• Click "Search."

• Highlight the row that corresponds to the selected PO number.

• Click OK to confirm your selection.

For amount-based POs

• Review the Amount field.

If needed, enter a lower amount to reflect the value you are billing.

For quantity-based POs

• Review both the *Available Quantity* and *Quantity* fields.
• Update the *Quantity* field to match the units you are billing for.

Note: The Quantity entered cannot exceed the Available Quantity.

If your invoice includes tax, select Invoice Actions from the dropdown menu and click Calculate Tax.

In the **Summary Tax Lines** section, click the tax line to open the **Percentage** and **Amount** fields

▪ Enter the appropriate percentage; the amount will auto calculate

▪ Note: Tax amount must match the tax percentage

Again, click **invoice actions** drop down and select **Calculate Tax**

Verify your totals.

If you notice any discrepancies in the tax calculation, please contact **Procurement@voya.com** for assistance.

Note: At any point, you may **Save** without submitting. Your invoice will be saved in an **Incomplete** status.

Once the invoice total matches the corresponding invoice copy, proceed to submit it using the Submit button located at the top right of your screen.

Once submitted, you will receive a confirmation message indicating that the invoice has been successfully submitted.
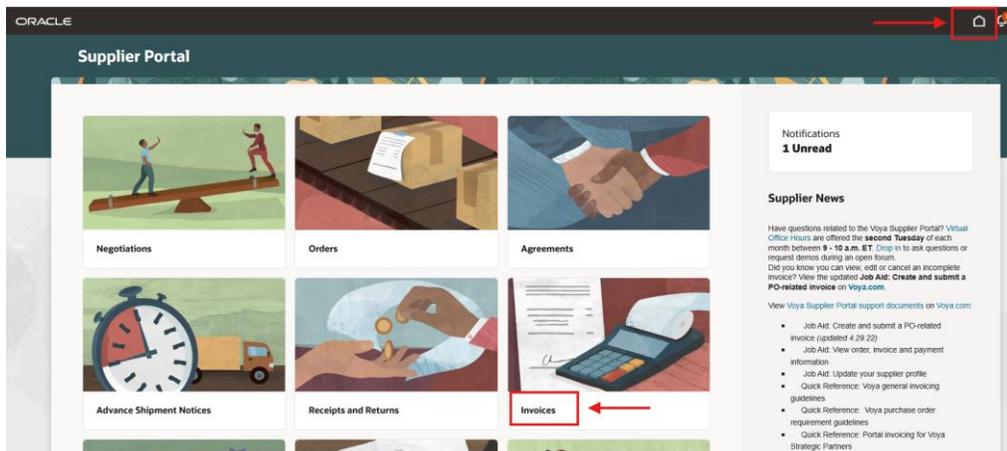

Optionally, click **Printable Page** to view the invoice details.

Click on **Done** to proceed to submit the new invoice.

Invoices in Incomplete Status.

Invoices that have been started but not submitted will remain in an **Incomplete status** until action is taken. An incomplete invoice can be edited or canceled. Click on **home** screen and then click on **invoices**.

Enter at least one of the following: **Invoice Number, Supplier** or **Purchase Order.**

Then click on *Search*.

From the search results, select the invoice with **Incomplete** status, and double-click the invoice number to open and edit the invoice.

Search Results

View ▾ ▦ ⬚ Detach

Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Payment Number
1234VOYA2	1/15/26	Standard			REMIT	USD	0.00 USD	Incomplete	

Before submitting the invoice, thoroughly review all details and make any necessary adjustments.

Please note: If an invoice number is canceled, it cannot be reused under any circumstance.

Ensure that all information — such as line items, amounts, dates, descriptions, tax details and required attachments — is accurate and complete prior to submission. This helps prevent processing delays and rework.