

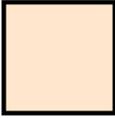
**Process:** Project Execution and Account Management

**Topic:** Create Vendor Invoice

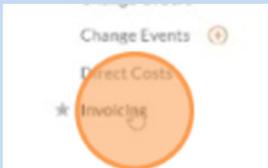
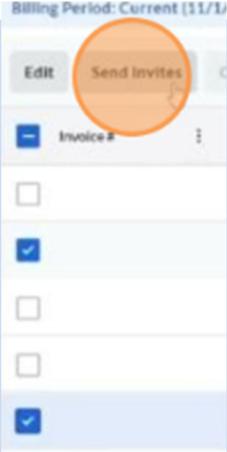
**Groups Involved:** BPM Team



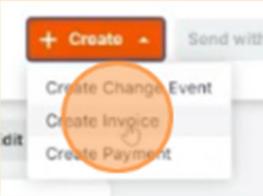
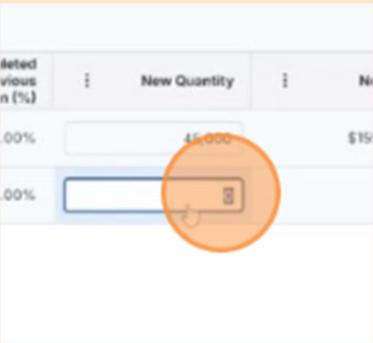
**Topic Purpose & Overview:** To accurately document and track financial transactions related to vendor services and purchases within Procore's centralized system. Creating vendor invoices in Procore ensures transparency, efficiency, and compliance with contractual obligations, facilitating timely payments and comprehensive financial management across projects.

<b>Key</b>	
<b>Color</b>	<b>Person Responsible for Action</b>
	Vendor
	StructureCare

**Topic: Create Vendor Invoice**

Steps	Visuals
<p><b>StructureCare Sends “Invite to Bill”</b></p> <ol style="list-style-type: none"> <li>1. <b>Log in</b> to your Procore account</li> <li>2. Navigate to <b>“Projects”</b> tab and select the project you intend to submit an invoice for</li> <li>3. Select the <b>“Invoicing”</b> tool within the project tools</li> <li>4. Select the <b>subcontractor</b> tab</li> <li>5. Select vendor(s) desired to bill</li> <li>6. Send invite to bill</li> </ol>	  
<p><b>Vendor Responds to Invitation</b></p> <ol style="list-style-type: none"> <li>1. SC Vendor submits invoice through <b>“Procore”</b></li> </ol>	

## Topic: Create Vendor Invoice

Steps	Visuals
<p><b>Procore Invoice - ProCore</b></p> <ol style="list-style-type: none"> <li>1. SC Vendor submits invoice in Procore</li> <li>2. Input <b>“Invoice #”</b></li> <li>3. Update the <b>“Billing Date”</b> to match the invoice submission date.</li> <li>4. <b>Input Quantity by line item</b></li> </ol> <p><b>Note:</b> Only Bill for work completed</p>	 <p>1</p>  <p>2</p>  <p>4</p>
<p><b>Start Invoice Workflow</b></p> <ol style="list-style-type: none"> <li>1. <b>SC PM</b> selects <b>“Start Workflow”</b>.</li> <li>2. <b>Invoice sent to PM</b></li> <li>3. <b>PM Responds</b> <ol style="list-style-type: none"> <li>a. If <b>rejected</b>, it goes <b>back to invoice creator</b></li> <li>b. If <b>approved</b>, status changes to <b>“Pending Owner Approval”</b> and goes to BPM Team</li> <li>c. BPM Team <b>checks insurance, MIGO amounts, and A/P blackout dates</b></li> <li>d. If <b>Invoice is okay</b>, BPM Team approves, and <b>invoices to go to SAP</b></li> </ol> </li> </ol>	 <p>b</p>
<p><b>Vendor Payment</b></p> <ol style="list-style-type: none"> <li>1. <b>Vendor is paid</b> according to their specific payment terms, starting from the invoice creation date.</li> </ol>	

## Guidelines

- Our Vendors are encouraged to create invoices directly in Procore for a more seamless review and approval to then more efficiently issue payment. Should a vendor not create their invoice in Procore, they would need to send a PDF of the invoice to Procore via reply to the Billing Invitation Email. The PM would then need to act on the following:
  - Create Invoice in Procore to Start Workflow

## Topic: Create Vendor Invoice

- Create Invoice in “Commitments Tool”
  - Update amounts by referencing the PDF invoice and then attach the vendor invoice for reference.