

Reference Guide for Submitting Internally Created Invoices Requiring New Supplier Setup

Steps to guide invoice owners to enter invoices for new suppliers related to internally created invoices, such as honorariums, awards, prizes and non-employee expense reimbursements, are provided within this document. The steps pertain to domestic and international suppliers.

A new supplier is a supplier who is not listed or found in GW iBuy+ Invoice when a supplier search is performed. Always perform a supplier search before an invoice with a new supplier setup is submitted.

For honorarium payments, a completed and approved [honorarium form](#) should be submitted as supporting documentation. The form must be accompanied by the appropriate tax form, [W-9](#) for domestic recipients or [W-8BEN](#) for international recipients who are treated as nonresident aliens for US tax purposes. In addition, for international recipients, the [Alien Information Request form](#) is required. The form must clearly identify the purpose of the honorarium and identify the dates in which the service was given to the university. More information about honorariums, including when an honorarium is appropriate, is located at <https://procurement.gwu.edu/awards-honorariums>.

Detailed receipts for expenditures should support non-employee expense reimbursements over \$35. Expenditures less than or equal to \$35.00 do not require a receipt.

Note: These instructions do not pertain to a commercial, domestic supplier or a commercial, international supplier who has submitted an invoice for goods or service. A domestic supplier is required to self-register through the iSupplyGW portal. A commercial, international supplier does not register via the iSupplyGW portal but instead is required to submit the necessary documentation to the iSupplyGW Team for processing. More information about a domestic and international supplier's registration is available at <https://procurement.gwu.edu/new-supplier-registration>.

Direct questions to University Payables at p2p@gwu.edu.

Step 1: Log into the CONCUR application using your single sign-on.

Step 2: Select the 'Invoice' module.

You are currently logged into a test instance of Concur

SAP Concur Invoice Approvals App Center Help

Profile

SAP Concur

Hello, Owner

+ Payment Request

00 Required Approvals

47 Payment Requests

MY TASKS

00 Required Approvals →

Great! You currently have no approvals.

47 Payment Requests →

- 09/11 test-Mike 9-11
\$500,000.00 - (BERIKBOL DUKEYEV)
- 09/11 09.11.18-1 Multiple PO
\$268.00 - (ROBERTS OXYGEN CO INC)
- 09/06 MH 09.05.18-1
\$30.00 - (ROBERTS OXYGEN CO INC)
- 09/05 test
\$50.00 - (NATIONAL TECHNOLOGY RENTALS)
- 09/05 MH 09.05.18-1
\$200.07 - (TEMPORARY SOLUTIONS INC)

Step 3: Click on 'Create New Request'.

The screenshot shows the SAP Concur Invoice interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Invoice' (highlighted in blue), 'Approvals', and 'App Center'. On the right, there are 'Help', 'Profile', and a user icon. Below the navigation bar, there are two links: 'My Requests' and 'Create New Request'. A blue arrow points to the 'Create New Request' link. The main content area is titled 'Payment Request List' and 'Unsubmitted Requests'. There are 'View Image' and 'Submit Request' buttons. Below this is a search bar with 'Request Name' and 'Begins with' dropdowns. A table lists several requests with columns for Request Name, Vendor Name, Invoice Number, Invoice Date, Approval Status, Payment Status, Total, Last Comment, and With User Since.

Request Name	Vendor Name	Invoice Number	Invoice Date	Approval Status	Payment Status	Total	Last Comment	With User Since
<input type="checkbox"/> PETTYCASH Description: NP- Expense Type(s): 53113:ATHLETIC RECRUITING TRAVEL	BRENDA DEVAUGHN CUSTODIAN	010816PETTYCASH	01/06/2016	Not Submitted - Invoice, Over	Not Paid	\$112.25		
<input type="checkbox"/> May 12 2017 P Cash Replenish Description: PETTY CASH REPLENISHMENT Expense Type(s): 52612-SPECIAL EVENTS/BUS RELATIONS	KELLY OBREIN CUSTODIAN	051217PETTYCASH	05/12/2017	Not Submitted - Invoice, Over	Not Paid	\$396.71	HOLD FOR K GAITAN EXT 4667	
<input type="checkbox"/> RW-GCAS REFUND TEST Does Not Match Purchase Order / Receipt Description: RW-GCAS REFUND C/R 000613051 DATED 12/01/2017 Expense Type(s): 56401-SUBCONTRACTY - W/ IDC CALC	AMERICAN INSTITUTE FOR RESEARCH	INV000020450CM	01/03/2018	Not Submitted - Invoice, Over	Not Paid	\$-144,525.00		
<input type="checkbox"/> RW-RECURRING TEST Matched to Purchase Order Expense Type(s): No Itemizations	CARDIN FINANCIAL SERVICES INC	CNW00190	03/01/2018	Not Submitted - Invoice, Over	Not Paid	\$0.00		

Step 4: Vendor Search:

Enter the vendor name in the search and click on magnifying glass button to search the vendor .If there are no search results then the vendor doesn't exist in Concur/iBuy+ Invoice.

As the new vendor does not exist in the Concur system, please use **Vendor Name: NEW VENDOR – TEMPORARY** in the vendor search.

Manage Requests ▾ Create New Request Processor ▾ Invoice Capture Payments ▾ Vendor Manager

Create New Payment Request

i Either choose Payment Request Type and select a Vendor from the vendor list, or find and select the purchase order for your payment request.

Payment Request Type: - OR - Purchase Order Search:

Vendor List

Most Recently Used Search: Vendor Name ▾ Begins with ▾ NEW VENDOR

Vendor Name	Vendor Number	Address 1	Address 2	City	State/Province	Postal/Zip Code	Country	Currency	Telephone Number	Tax ID
BANI MALHOTRA	492363	1201 BRADDOCK PLACE	APARTMENT 713	ALEXANDRIA	VA	22314	UNITED STATES	US, Dollar		
DELL FINANCIAL SERVICES...	110769	PAYMENT PROCESSING CE...	P.O. BOX 5292	CAROL STREAM	IL	60197-5292	UNITED STATES	US, Dollar		
NEW VENDOR - TEMPORARY	TEMPORARY VALUE	NEW VENDOR - REPLACE ...				NEW VENDOR	UNITED STATES	US, Dollar		

Select the Vendor “New Vendor –Temporary” as your vendor and double click.

Step 5: Enter Invoice Details using the vendor name as “New Vendor –Temporary”.

Create New Request

Enter Invoice Details

Submit Request

Actions ▾ Details ▾

Vendor Information

NEW VENDOR - TEMPORARY
TEMPORARY VALUE

NEW VENDOR - REPLACE WITH VALID VENDOR

NEW VENDOR

Vendor Code: TEMPORARY VALUE
Address Code: TEMPORARY VALUE

Currency: USD-US, Dollar

Please verify the vendor information like vendor name, vendor code (supplier number), address code (supplier site) still shows NEW VENDOR TEMPORARY

Invoice Form Type: Donation Invoice Type: Standard Request Name: TESTNEWVENDOR

WCF Expiration Date: [] Are All Services Performed Outside the US?: NA Is 100% of the Payment for Services?: Yes Service Period: []

Payment Remittance Description (Visible to Vendors): TESTNEWVENDOR Invoice Number: TESTNEWVENDOR Invoice Date: 03/03/2019 Currency: USD-US, Dollar

Total Invoice Amount (incl S&T): 100 Shipping: 0.00 Request Total: 0.00 Grant/Non Grant: (GL) Non-Grant Oracle Alias: (617009) FINANCIAL REPOF Processing Type: Standard Payment Method: CHECK

Net Payment Terms: 30 Payment Due Date: 04/02/2019 Mail Instructions: [] Special Handling Detail: [] Special Handling Code: [] PO Number: [] Comments (Message to AP): []

FD Group: A/P FOR FINANCE

View Change Save

View Invoice

Itemization Summary

Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
No items found.										

← Back to List

Enter all the Invoice Header and lines details.

Payment Request Status: Not Submitted
TESTNEWVENDOR [Submit Request](#)

Actions • Details • [View Invoice](#)

Vendor Information

NEW VENDOR - TEMPORARY
TEMPORARY VALUE

NEW VENDOR - REPLACE WITH VALID
VENDOR

NEW VENDOR

Vendor Code: TEMPORARY VALUE
Address Code: TEMPORARY VALUE

Currency: USD-US, Dollar

[View](#) [Change](#)

Invoice Details

Payment Request Type Non PO Payment Request Polic	W8 Received None Selected	W8 Expiration Date 	WCF Expiration Date 	Are All Services Performed Outside the US? NA	Is 100% of the Payment for Services? Yes	Service Period
Invoice Form Type Donation	Invoice Type Standard	Request Name TESTNEWVENDOR	Payment Remittance Description (Visible to Vendors) TESTNEWVENDOR	Invoice Number TESTNEWVENDOR	Invoice Date 03/03/2019	Currency USD-US, Dollar
Total Invoice Amount (incl S&T) 100.00	Shipping 0.00	Request Total 100.00	Grant/Non Grant (GL) Non-Grant	Oracle Alias (617009) FINANCIAL REPOH	Processing Type Standard	Payment Method CHECK
Net Payment Terms 30	Payment Due Date 04/02/2019	Mail Instructions 	Special Handling Detail 	Special Handling Code 	PO Number 	Comments (Message to AP)
FD Group A/P FOR FINANCE	Line Item Tax Amount 0.00					

[Save](#)

Itemization Summary Amount Remaining to be Itemized: \$0.00

[Add Item](#) [Delete Item](#) [Edit](#) [Distribute](#) Show Distributions

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
1	54111-OFFICE SUPPLIES	test	1					\$100.00	\$100.00	\$0.00
		Account Code	Distribution Code		Percentage		Net Amount		Gross Amount	
		54111 [System Default]	GL-617009		100		\$100.00		\$100.00	

Click on Save.

Step 6: Upload your invoice image.

Click on 'Actions' -> Upload Image

Note: Attach the invoice image and other documents that are required for a new vendor set up in EAS. For example, if this is an expense reimbursement to a non-employee, provide a document with his/her address to where the check payment should be delivered. An email from the individual providing the address is acceptable for expense reimbursements.

The screenshot shows the SAP Concur 'Invoice' page for a payment request with ID 'UPS 00002777625'. The page is divided into several sections:

- Header:** SAP Concur logo, navigation tabs (Invoice, Approvals, App Center), and user profile information.
- Payment Request Summary:** Displays the request ID 'UPS 00002777625' and a 'Submit Request' button. The status is 'Not Submitted'.
- Actions Menu:** A dropdown menu is open, showing options: Unassign, Upload Image (highlighted with a green arrow), Delete Image, Delete Request, Print, Extend Due Date, Change Policy, and Create Recurring Request.
- Invoice Details Form:** A grid of fields for invoice information, including:
 - Payment Request Type: Non-PO Payment Request Pull
 - Request Name: UPS 0000277762518
 - Invoice Number: 0000277762518
 - Invoice Date: 12/22/2018
 - Payment Method: CHECK
 - Net Payment Terms: 25
 - Payment Due Date: 01/02/2019
 - Invoice Form Type: Non-PO Commercial Invoice
 - Total Invoice Amount (incl S&T): 189.85
 - Shipping: 0.00
- Itemization Summary:** A table showing the breakdown of the invoice:

No.	Expense Type	Line Description	Quantity	Type of Activity	Regions	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
1	63411 POSTAGE/EXPRESS MAIL - NON GW	Law Library deliveries for the w...	1					\$189.85	\$189.85	\$0.00
								Net Amount	\$189.85	
								Gross Amount	\$189.85	

Step 7: Invoice Owner ‘unassigns’ the invoice.

An action -> Unassign The invoice owner does not select anyone to whom to assign the invoice. When an invoice is unassigned, it is routed to Accounts Payable for action.

Add comments. For example in the Comments (Message to AP): “New vendor set up is required.” **If a student is involved, in the Comments, state “setup is needed for student” and provide his/her GWID.**

Payment Request Status: Not Submitted

TESTNEWVENDOR [Submit Request](#)

Actions ▾ Details ▾

Click on Unassign (highlighted in orange box with arrow pointing to the Unassign menu item)

View Invoice [View Invoice](#)

Invoice Details

Payment Request Type: Non PO Payment Request Polc | W8 Received: None Selected | W8 Expiration Date: | WCF Expiration Date: | Are All Services Performed Outside the US?: NA | Is 100% of the Payment for Services?: Yes | Service Period: |

Invoice Form Type: Donation | Invoice Type: Standard | Request Name: TESTNEWVENDOR | Payment Remittance Description (Visible to Vendors): TESTNEWVENDOR | Invoice Number: TESTNEWVENDOR | Invoice Date: 03/03/2019 | Currency: USD-US, Dollar |

Total Invoice Amount (incl S&T): 100.00 | Shipping: 0.00 | Request Total: 100.00 | Grant/Non Grant: (GL) Non-Grant | Oracle Alias: (617009) FINANCIAL REPOF | Processing Type: Standard | Payment Method: CHECK |

Net Payment Terms: 30 | Payment Due Date: 04/02/2019 | Mail Instructions: | Special Handling Detail: | Special Handling Code: | PO Number: | Comments (Message to AP): |

FD Group: AVP FOR FINANCE | Line Item Tax Amount: 0.00

[View](#) [Change](#) [Save](#)

Itemization Summary

[Add Item](#) [Delete Item](#) [Edit](#) [Distribute](#) Show Distributions Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
1	54111-OFFICE SUPPLIES	test	1					\$100.00	\$100.00	\$0.00
Account Code		Distribution Code	Percentage		Net Amount		Gross Amount			
54111 [System Default]		GL-617009	100		\$100.00		\$100.00			

Add comments to the Payment Request.

The screenshot displays a web application interface for managing payment requests. A modal dialog titled "Unassign Request" is open in the center. The dialog contains a "Comment" text area with the text "New vendor Setup" and a "Comment History" table. The background is a dimmed view of the "Payment Request" form for "TESTNEWVENDOR".

Unassign Request Dialog:

Requests should be unassigned when they don't belong in your queue. They may belong to another employee or be invalid. Unassigning removes the request from your queue and allows the backoffice to act on it. Please add a comment to explain why you are unassigning.

Comment:

Date	Entered By	Comment Text
No comments.		

Buttons: OK, Cancel

Payment Request Form (Background):

Payment Request: TESTNEWVENDOR

Vendor Information: NEW VENDOR - TEMPORARY TEMPORARY VALUE

Invoice Details: Payment Request Type: Non PO Payment Request Polc; Invoice Form Type: Donation; Invoice Type: Standard

Itemization Summary:

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
1	54111-OFFICE SUPPLIES	test	1					\$100.00	\$100.00	\$0.00

Click on OK.

By clicking “Unassign Request” the request will route to Accounts Payables and Accounts Payable will work with Supplier Maintenance for New Vendor Set up.

Invoice will no longer show in your queue.

Step 8: Accounts Payable will assign the invoice back to the Invoice Owner with the new vendor tied to the Invoice. This process may take up to two business days. Accounts Payable will engage and provide the supporting documentation to Supplier Maintenance to setup the new vendor.

The invoice will show up in “UnSubmitted request “

Open the Request, verify all the details, and submit the Invoice for approvals.

Payment Request
TESTNEWVENDOR1

Status: Not Submitted
[Submit Request](#)

[View Invoice](#)

Vendor Information
DELL FINANCIAL SERVICES LP
PAYMENT PROCESSING CENTER
P.O. BOX 5292
CAROL STREAM, IL
60197-5292
Vendor Code: 110769
Address Code: CAROL STREAM-02
Currency: USD-US, Dollar

Please verify the Vendor information like vendor name, vendor code (supplier number), address code (supplier site) shows the new vendor that is setup

WCF Expiration Date:
Are All Services Performed Outside the US?:
Is 100% of the Payment for Services?:
Service Period:
Payment Remittance Description (Visible to Vendors):
Invoice Number:
Invoice Date:
Currency:
Grant/Non Grant:
Oracle Alias:
Processing Type:
Payment Method:
Special Handling Detail:
Special Handling Code:
PO Number:
Comments (Message to AP):
Total Invoice Amount (incl S&T):
Shipping:
Request Total:
Net Payment Terms:
Payment Due Date:
Mail Instructions:
FD Group:
Line Item Tax Amount:

Itemization Summary

[Add Item](#) [Delete Item](#) [Edit](#) [Distribute](#) | Show Distributions | Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
1	54111-OFFICE SUPPLIES	test vendor	1					\$100.00	\$100.00	\$0.00
	Account Code 54111 (System Default)	Distribution Code GL-617009		Percentage 100				Net Amount \$100.00		Gross Amount \$100.00

Step 9: Submit the Invoice for Approval.

Payment Request
TESTNEWVENDOR1

Status: Not Submitted
Submit Request

Show Exceptions
View Invoice

Approval Flow for Payment Request: TESTNEWVENDOR1

You must identify an approver before the request proceeds to the next workflow step.

Invoice Approver:
Shared Services:
(this step may be skipped)
Back Office Approval:

Submit Request

Save Workflow Cancel

Vendor Information
FISHER SCIENTIFIC CO LLC
2000 PARK LN
PITTSBURGH, PA 15275
Vendor Code: 114401
Address Code: PITTSBURGH-04
Currency: USD-US, Dollar

Invoice Details
Payment Request Type: Non PO Payment Request Policy
W8 Received: None Selected
Invoice Form Type: Donation
Invoice Type: Standard
Total Invoice Amount (incl S&T): 100.00
Shipping: 0.00
Net Payment Terms: 25
Payment Due Date: 03/23/2019
FD Group: AVP FOR FINANCE
Line Item Tax Amount: 0.00

Itemization Summary

Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax	
1	54111-OFFICE SUPPLIES	test vendor	1					\$100.00	\$100.00	\$0.00	
								Net Amount	\$100.00	Gross Amount	\$100.00
									\$100.00		\$100.00

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Previous Request | Request 18 of 23 | Next Request