



# Bull Marketplace – Payment Request Forms

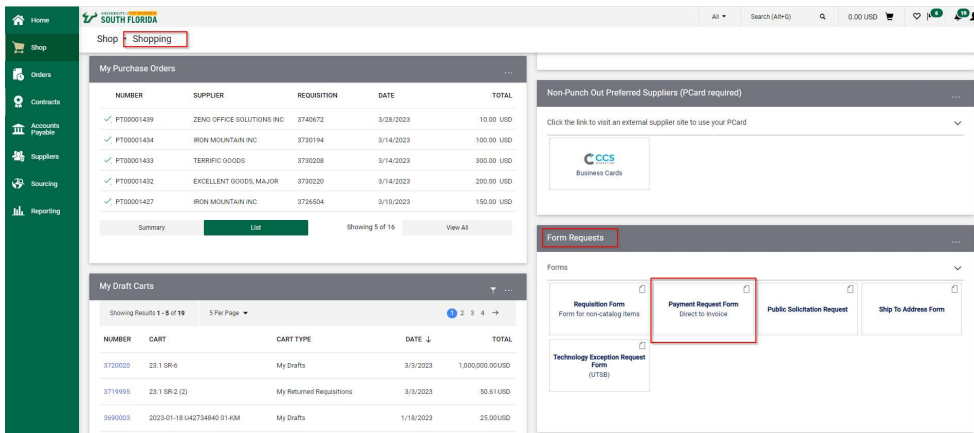
## Tutorial: Creating a PRF

**Instructions: Payment Request Forms (PRF)** are submitted directly to Accounts Payable in Bull Marketplace. See the PRF Guidelines for a list of allowable purchases on a Payment Request Form. **Payment Requests submitted beyond 60 days of the date of the transaction will require VP approval.**

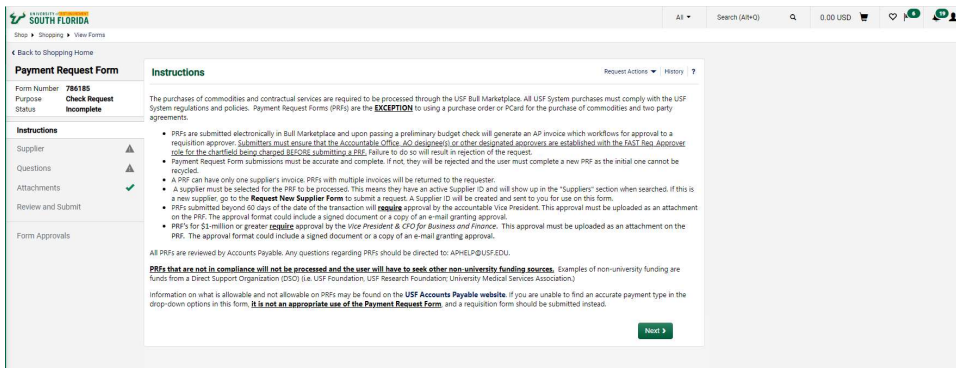
**Note:** Payments to employees and study subjects are not processed on the PRF. Forms for these payments are available on the Accounts Payable website [here](#).

### 1. In the Bull Marketplace Menu **Navigate** to:

Shop > Shopping Home Page > Form Requests  
 Select **Payment Request Form**



### 2. Review the **Instructions** page, then **Select the Next**



## Payment Request Form

- Supplier Section:** Search for your supplier and select to add to your form. Double check that the correct address is selected. Once the supplier information is populated select **Next**.

If the supplier does not exist, go to the New Supplier Request Form to submit a request. A Supplier ID will be created and sent to you for use on this form.

The screenshot shows the 'Supplier' section of the Payment Request Form. The form is titled 'Payment Request Form' and includes a sidebar with navigation options like 'Supplier', 'Questions', 'Attachments', 'Review and Submit', and 'Form Approvals'. The main content area is divided into sections: 'Supplier' (with a search box containing 'FEDEX'), 'Remit-To Address' (with a dropdown menu showing 'PO BOX 94215 (Primary Remittance)'), and 'Payment Method' (set to 'Check1 (Check)'). At the bottom, there are 'Previous', 'Save Progress', and 'Next' buttons.

- Questions Section:** Complete the invoice details.

**Invoice Details:** Supplier Invoice Number and Invoice Date are required fields. If the supporting backup documents do not have a true invoice number, one must be created using the following format.

- For individuals use the date of delivery or service completion, first initial and last name. Ex. **01232019JSMITH**
- For businesses or other entities use date of delivery or service completion and initials of the full company name. Ex. **11082019FDOE**.

**Payment Request Type:** This is a drop-down list of payment types that are allowable on a PRF.

**Description of Expenditure:** The description should reflect what is being paid for, contain a clear business purpose, and should match the backup documentation attached to the form. **Only the first 30 characters will become the Finance Mart description.**

The screenshot shows the 'Invoice Details' section of the Payment Request Form. The form includes a sidebar with navigation options like 'Supplier', 'Questions', 'Attachments', 'Review and Submit', and 'Form Approvals'. The main content area is divided into sections: 'Supplier Invoice Number' (with a text box containing '154467789'), 'Invoice Date' (with a date picker showing '08/02/2023'), 'Payment Request Type' (with a dropdown menu showing 'Invoice'), 'Description' (with a text box containing 'Fugate invoice'), 'Currency' (with a dropdown menu showing 'USD'), and 'Amount' (with a text box containing '10.00'). At the bottom, there are 'Previous', 'Save Progress', and 'Next' buttons.

# Payment Request Form

## 5. Codes Section: Select Edit to add your Chartfields

**Payment Request Form**  
Form Number: 786185  
Purpose: Check Request  
Status: Incomplete

**Codes**

Errors:  
• Required field: Account Line  
• Required field: Fund Line  
• Required field: Oper Unit Line

LINE	GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference	edit
USFD1 USF	no value Required field	no value Required field	no value Required field	no value Required field	no value	no value	no value	no value	no value	no value	

Add alternate distribution for: Discount

★ Required

## Enter Chartfields and Save

**Accounting Codes**

Errors:  
• Required field: Account Line  
• Required field: Fund Line  
• Required field: Oper Unit Line

LINE	GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference	add split
USFD1	Select from profile values... Select from all values...	TPA Select from all values... Required field	03904 Select from all values... Required field	52320 Select from all values... Required field	025100 Select from all values...	000000 Select from all values...	0000000 Select from all values...		Select from all values...	Select from all values...	

resubmit / validate

## Once completed select Next

**Payment Request Form**  
Form Number: 786185  
Purpose: Check Request  
Status: Incomplete

**Codes**

Accounting Codes

LINE	GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference	edit
USFD1 USF	USF	TPA USF TAMPA	03904 PURCHASED UTILITIES AUXILIARY	52320 FREIGHT & SHIPPING	025100 UTILITIES	000000 DEFAULT PRODUCT	0000000 DEFAULT INITIATIVE	no value	no value	no value	

Add alternate distribution for: Discount

★ Required

## Payment Request Form

6. **Additional Information Section:** Location and PO Business Unit are not required for the PRF but will automatically populate if you have values setup. Select **Next**.

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Shop > Shopping > View Forms

< Back to Shopping Home

**Payment Request Form**

Form Number **786185**  
Purpose **Check Request**  
Status **Incomplete**

Instructions  
Supplier ✓  
Questions ✓  
Codes ✓  
**Additional Information** ✓  
Attachments ✓  
Review and Submit  
Form Approvals

**Additional Information**

Request Actions | History ?

**General Information**

Location: MDC2305  
Select from profile values...  
Select from all values...

PO Business Unit: TAMPA  
Select from profile values...  
Select from all values...

\* Required

< Previous Save Progress **Next >**

7. **Attachments Section:** Add/upload required backup documentation.

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Shop > Shopping > View Forms

< Back to Shopping Home

**Payment Request Form**

Form Number **786185**  
Purpose **Check Request**  
Status **Incomplete**

Instructions  
Supplier ✓  
Questions ✓  
Codes ✓  
Additional Information ✓  
**Attachments** ✓  
Review and Submit  
Form Approvals

**Attachments**

Please add your attachments below:

**Add Attachment**

< Previous Save Progress **Next >**

### Save Changes

**Upload**

Title \* TEST

File \* Choose File 2318542.pdf  
Maximum upload file size: 25.0 MB

\* Required

**Save Changes** Close

## Payment Request Form

### Select Next

Shop > Shopping > View Forms  
Back to Shopping Home

**Payment Request Form**

Form Number: 786185  
Purpose: Check Request  
Status: Incomplete

Instructions  
Supplier ✓  
Questions ✓  
Codes ✓  
Additional Information ✓  
Attachments ✓  
Review and Submit  
Form Approvals

Attachments

#	Attachment
1	TEST

Request Actions | History ?

Previous Save Progress **Next >**

8. **Review and Submit Section:** Once you have completed all required fields review and **Submit**.

Shop > Shopping > View Forms  
Back to Shopping Home

**Payment Request Form**

Form Number: 786185  
Purpose: Check Request  
Status: Incomplete

Instructions  
Supplier ✓  
Questions ✓  
Codes ✓  
Additional Information ✓  
Attachments ✓  
Review and Submit  
Form Approvals

**Review and Submit**

Request Actions | History ?

✓ Required Fields Complete

Section	Progress
Supplier	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Codes	✓ Required Fields Complete
Additional Information	✓ Required Fields Complete
Attachments	✓ Required Fields Complete

Previous Add to Favorites **Submit**

Click **Yes** if you wish to send form through workflow. Click **No** if you wish to make additional changes. Changes will not be able to be made once sent through workflow.

Confirm

Are you sure you want to submit this form?

**Yes** No

## Payment Request Form

- Form Approvals:** When the PRF has been submitted the system will create a Non-PO Invoice. Once created the system generated invoice number will be provided. The PRF is now complete and all additional workflow will be associated with the created invoice.

**Payment Request Form**

Form Number: 786185  
 Purpose: Check Request  
 Status: **Approved**  
 Invoice: VT002338

**Form Approvals**

Submitted 5/4/2023 4:48 PM → Create Non PO Invoice (Completed) → Completed 5/4/2023 4:49 PM

- Review Invoice:** Select the invoice to review. Once on the invoice you can view the current workflow step in the **What's next** section.

**Invoice** • FEDEX • VT002338

**General**

Invoice Type: Invoice  
 Pay Status: In Process  
 Invoice Number: VT002338  
 Supplier Invoice No.: 5544667799  
 Supplier Name: FEDEX  
 Accounting Date: 5/4/2023  
 Invoice Owner: [Redacted]  
 Invoice Date: 5/2/2023  
 Discount Date: no value  
 Due Date: 5/2/2023  
 Terms: 0% 0, Net 0  
 Terms Discount: 0.00 USD  
 Invoice Name: Payment Request Form  
 Location: MDC2305 HEALTH SCIENCE MAIN BUILDING  
 PO Business Unit: TAMPA Tampa Campus

**Addresses**

**Remit To**  
 PO BOX 94515  
 PALATINE, Illinois 60094-4515  
 United States  
 Address Id 3

**Bill To**  
 no address

**Payment Information**

Payment Method: Unknown  
 Payment Record Date: no value  
 Payment Record No.: no value

**Note/Attachments**

External Note: no value  
 Internal Note: no value

External Attachments  
 Internal Attachments

Internal Attachments	Date
TEST	5/4/2023

**Discount, Tax, Shipping & Handling**

Allocation	Weighted	Header-level
Discount		0.00 USD
Tax		0.00 USD
Shipping		0.00 USD
Handling		0.00 USD

**Summary**

Supplier Invoice No.: 5544667799  
 Invoice Image: TEST

**Total (10.00 USD)**

Subtotal	10.00
Discount	0.00
Tax	0.00
Shipping	0.00
Handling	0.00
Miscellaneous Fees	0.00
<b>Total</b>	<b>10.00</b>

**What's next?**

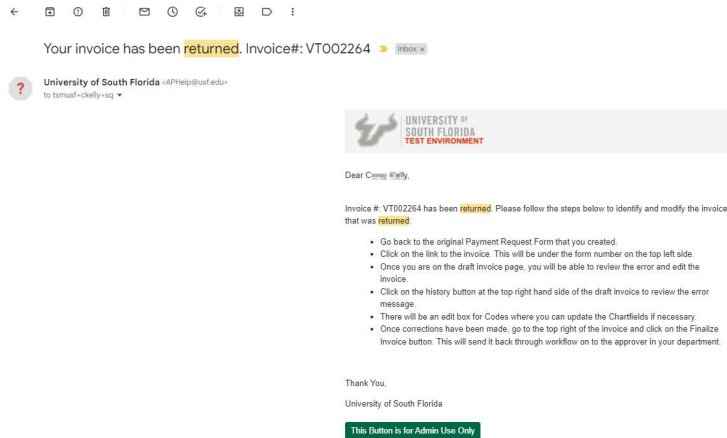
Workflow

- Submitted 5/4/2023 4:49 PM
- Initial Validation Completed
- Fund Approval Active**

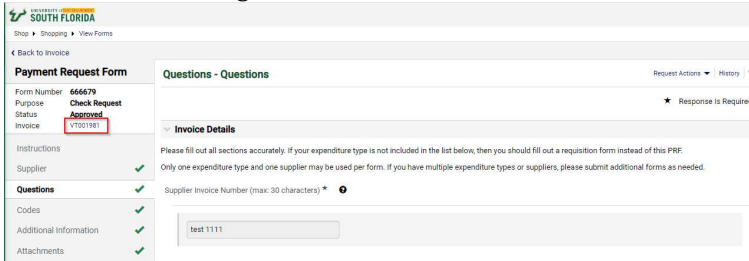
## Payment Request Form

**11. Invoice Returned:** If the invoice fails **Initial Validation** step or is flagged as a duplicate, it will be returned to you and set to **Draft** status. A notification will be sent via email with instruction on how to review and correct.

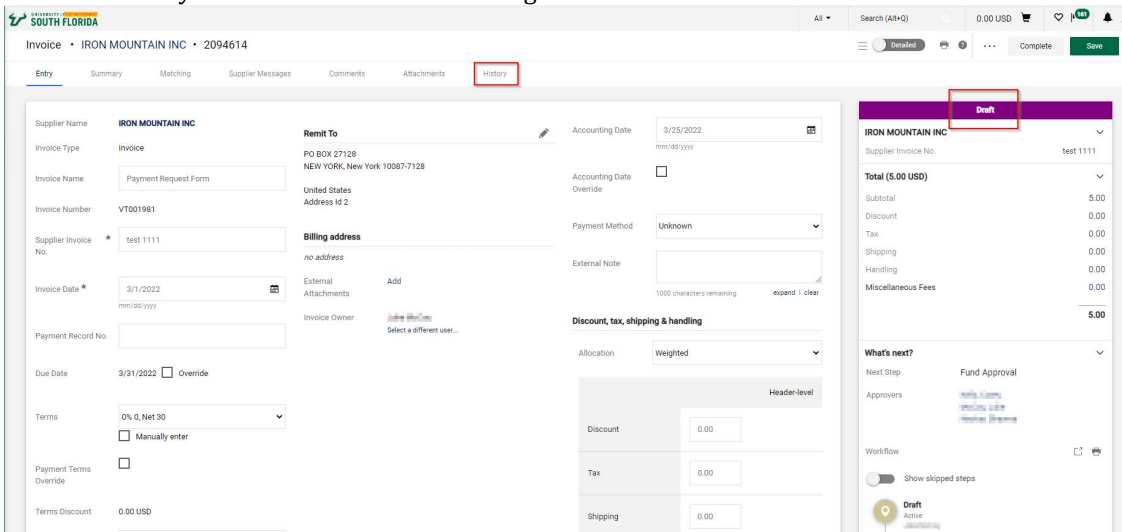
**Note:** Draft invoices cannot be deleted. If this is no longer a valid request due to duplicate status, there is need to make additional changes. Notate that this is a duplicate in the comments and leave in draft status.



Go to the original Payment Request Form and click the link to the invoice. You will not be able to search for the invoice through the invoice search while it is in draft status.



Click the History Link to view the error message.



## Payment Request Form

Review the error message in the note. The Invoice Return will show up in the history and provide the message for the error.

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Invoice • IRON MOUNTAIN INC • 2094614

Entry Summary Matching Supplier Messages Comments Attachments History

Start date: mm/dd/yyyy End date: mm/dd/yyyy Action: Invoice Document type: Filter Clear All Filters Export CSV

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	3/25/2022 3:57:27 PM	System		Modified	Pay Status	In Process	empty	
	3/25/2022 3:57:27 PM	System		Invoice Returned (via Workflow)		empty		Line 0, Split 0 - Budget Check Exception for Ledger Group: CC_ORG - Operating Unit = TPA, Account = 88420, Fund = 03904 Department = 025300, Product = 000000, Initiative = 0000000, Budget Period = 2022 <b>No Budget found for the values provided.</b> Show less
	3/25/2022 3:53:48 PM	System		Initial Validation				Message transmission to external system successful.
	3/25/2022 3:51:42 PM	Julie McCoy						Invoice created

For Chartfields changes go to the **Codes** section and select the pencil to **edit**

Invoice • IRON MOUNTAIN INC • 2094614

Entry Summary Matching Supplier Messages Comments Attachments History

Withholding Code Override: *no value* Separate Payment Override:


Withholding Applicable: *no value* Payment Handling Override: *no value*

Invoiced By: Julie McCoy Escheated Payment: *no value*

Match Status: Unmatched Payment Comments: *no value*

Invoice Source: Form Request

Contains substituted item(s):

**Codes** 

LINE	GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference
1	USF01 USF	TPA USF TAMPA	03904 PURCHASED UTILITIES AUXILIARY	53300 SUPPLY/EQUIP BLDG/FACILITIES	025300 POST OFFICE	000000 DEFAULT PRODUCT	0000000 DEFAULT INITIATIVE	<i>no value</i>	<i>no value</i>	<i>no value</i>

Make your correction and **Save**

**Edit Codes**

Accounting Codes Add alternate distribution for Discount +

LINE	GL Unit *	Oper Unit *	Fund *	Account *	Dept *	Product *	Initiative *	PC Bus Unit *	Project / Activity *
	USF01	TPA	03904	53300	025100	000000	0000000		
					025100 - UTILITIES				

★ Required fields **Save** Close



## Payment Request Form

Click **Complete** to send the Invoice back through workflow.

Invoice • IRON MOUNTAIN INC • 2094614

Summary Matching Supplier Messages Comments Attachments History

Invoice Source: Form Request

Contains substituted Item(s) ✗

**Codes**

LINE	GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference
USF01	USF	TPA	03904	53300	025100	000000	0000000	no value	no value	no value
		USF TAMPA	PURCHASED UTILITIES AUXILIARY	SUPPLY/EQUIP BLDG/FACILITIES	UTILITIES	DEFAULT PRODUCT	DEFAULT INITIATIVE			

**Draft**

IRON MOUNTAIN INC

Supplier Invoice No. test 1111

**Total (5.00 USD)**

Subtotal	5.00
Discount	0.00
Tax	0.00
Shipping	0.00
Handling	0.00
Miscellaneous Fees	0.00

Review the history to ensure your change corrected the error. Example below is now back in workflow in a pending status awaiting **Fund Approval**.

Invoice • IRON MOUNTAIN INC • VT001981

Summary Matching Supplier Messages Comments Attachments **History**

Start date: mm/dd/yyyy End date: mm/dd/yyyy Action: Invoice Document type: Filter Clear All Filters Export CSV

1-8 of 8 Results 20 Per Page

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	5/9/2023 1:31:26 PM	System	Initial Validation	Invoice budget check passed				Invoice VT001981
	5/9/2023 1:28:09 PM	System	Initial Validation	Message transmission to external system successful.				inValidation
	5/9/2023 1:28:00 PM	System	Modified		Pay Status	empty		In Process
	5/9/2023 1:28:00 PM	System	Modified		Workflow Status	Draft		Pending
	3/25/2022 3:57:27 PM	System	Modified		Pay Status	In Process	empty	
	3/25/2022 3:57:27 PM	System		Invoice Returned (via Workflow)		empty		Line: 0, Split: 0 - Budget Check Exception for Ledger Group: CC_ORG - Operating Unit = TPA, A... Show more
	3/25/2022 3:53:48 PM	System	Initial Validation	Message transmission to external system successful.				
	3/25/2022 3:51:42 PM			Invoice created				

1-8 of 8 Results 20 Per Page

**Pending**

IRON MOUNTAIN INC

Supplier Invoice No. test 1111

**Total (5.00 USD)**

Subtotal	5.00
Discount	0.00
Tax	0.00
Shipping	0.00
Handling	0.00
Miscellaneous Fees	0.00
	5.00

**What's next?**

Workflow

Show skipped steps

Submitted 5/9/2023 1:28 PM

Initial Validation Completed

Fund Approval Active