

7. Submitting and Viewing Invoices

BidMaster Replacement – Supplier Enablement

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Purpose

The purpose of this module is to teach you how to create, submit, and monitor invoices in PGW after Goods Receipts have been completed. You learn how to review and complete supplier invoice details, understand how the invoice moves into Lumen's approval process, and track the invoice through payment-related statuses so you know what to do if it is approved, blocked, partially paid, rejected, or deleted.



Prerequisites and Training Support

Before starting this module, complete

Module 1. Getting Started in PGW: Overview, Login, Preferences, and Navigation.

- This module builds on that foundation and assumes familiarity with accessing PGW, navigating tiles, using filters and tables, and reviewing key screen elements across the system.

Module 2. Manage Purchase Orders OLA LE Construction

Module 3. Manage Purchase Orders – Service Drop

Module 6. Manage Purchase Orders for Awarded RFQs

- These modules come before invoicing. Depending on your training journey, complete the applicable purchase order or RFQ module first, since invoice creation begins only after work is completed and the related Goods Receipts are submitted.
- This deck is supported by a detailed training companion document, **7. Submitting and Viewing Invoices**, which provides a deeper explanation of the invoice process, invoice workflow, statuses, supplier actions, and step-by-step system navigation with screenshots.

Where Module 7 Fits in the Training Journeys

OLA LE Construction	Service Drop	Construction Maintenance System	RFQ Bid Process
1. Getting Started in PGW: Overview, Login, Preferences, and Navigation	1. Getting Started in PGW: Overview, Login, Preferences, and Navigation	1. Getting Started in PGW: Overview, Login, Preferences, and Navigation	1. Getting Started in PGW: Overview, Login, Preferences, and Navigation
2. Manage Purchase Orders OLA LE Construction	3. Manage Purchase Orders – Service Drop	4. Manage Purchase Orders – CMS	5. Respond to and Manage RFQ Invitations (Bid Process)
7. Submitting and Viewing Invoices	7. Submitting and Viewing Invoices	7. Submitting and Viewing Invoices	6. Manage Purchase Orders for Awarded RFQs
			7. Submitting and Viewing Invoices

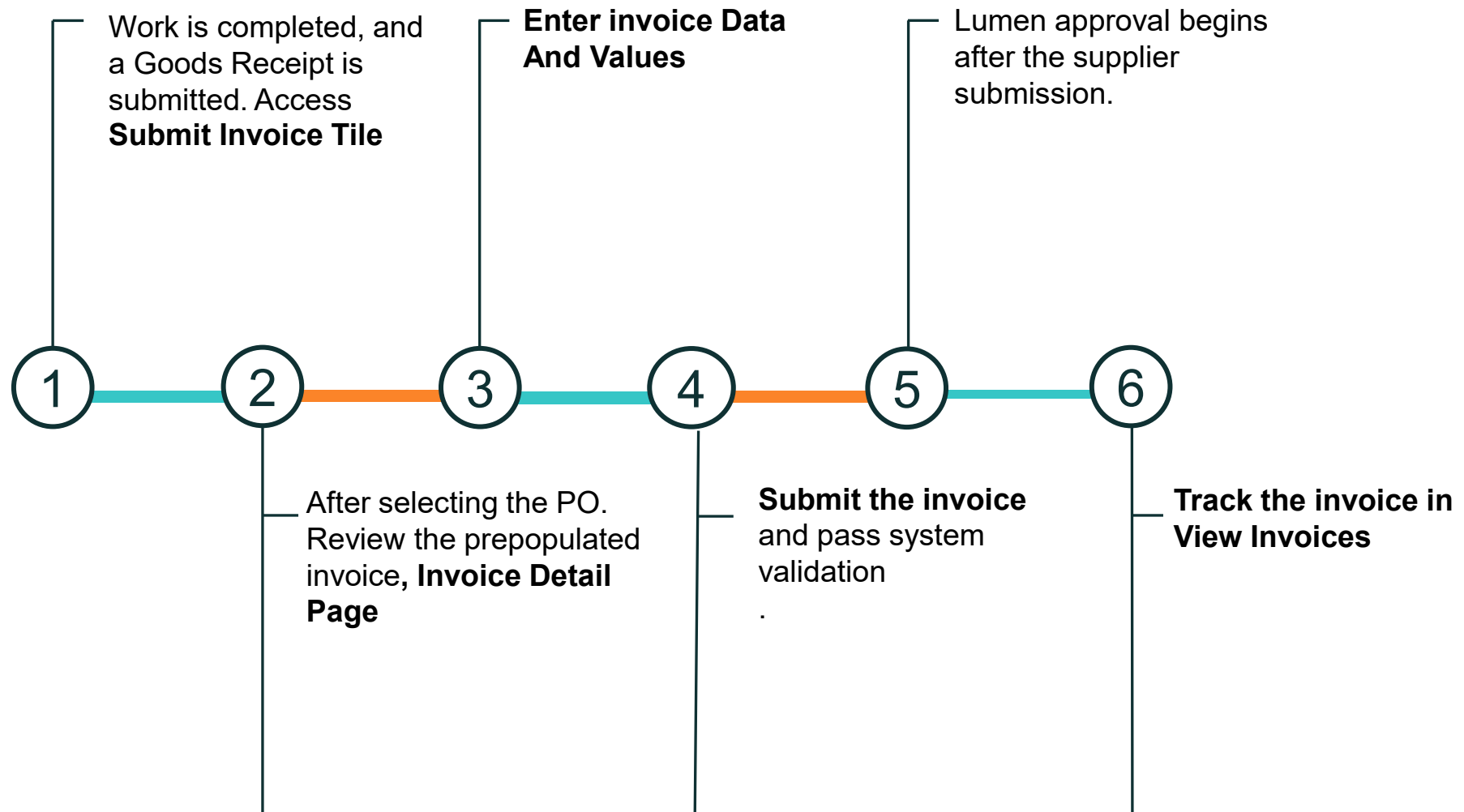
Learning Objectives

By the end of this module, learners will be able to:

- Create an invoice from Goods Receipt-ready PO lines
- Complete the supplier invoice reference, supplier invoice date, comments, taxes, and attachments
- Use the View Invoices application to monitor invoice progress
- Interpret invoice statuses such as Pending for Approval, Approved, Blocked for Payment, Partially Paid, Remitted, Cancelled, and Rejected
- Understand when an invoice can be deleted and when a new invoice must be created



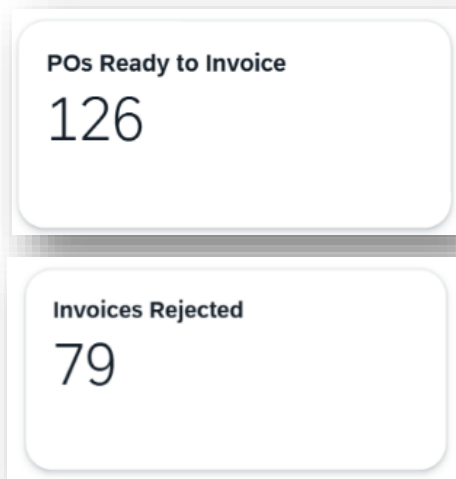
System Process in PGW for Invoicing



Tip: How to Access Invoice Applications

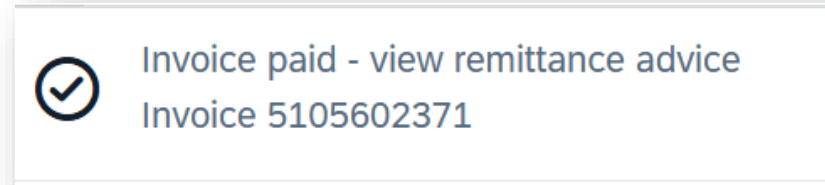
You can access invoice-related work in three common ways. For supplier training, use the Submit Invoice Tile to create invoices and the View Invoices Tile to monitor them after they are submitted.

From the Action Center Tile



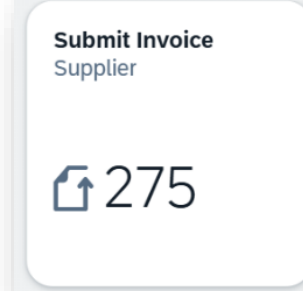
- Use these options to start from a **worklist view** focused on items that require action

From the Message Center



- Use this option to open View Invoice from a **specific notification**, so you can respond to the event that triggered the message

From the Tile



- Use this option to access a list of your purchase orders with goods receipts that are ready to be turned into invoices

Submit Invoice

- Before you can create an invoice, the related **Goods Receipt must be completed in PGW**. The invoice is created only from work that has already been received and recorded in the system.
- If the Goods Receipt is **partial**, you can also create a **partial invoice** for only the quantity that has been received. The remaining quantity stays open and can be invoiced later after additional Goods Receipts are submitted.

The screenshot displays the Lumen Procurement Gateway interface. At the top, there is a blue header with 'LUMEN Home' and a search icon. Below the header, the page title 'Procurement Gateway' is visible. A large orange banner reads 'Lumen Procurement Gateway'. The main content area is divided into several sections:

- Action Center:** A grid of six tiles showing various metrics: Open RFQs (28), OLAI/RFO POs Pending Supplier Action (54), CMS POs Pending Supplier Action (177), Service Drop POs Pending Supplier Action (148), POs Ready to Invoice (140), and Invoices Rejected (79).
- Message Center:** A list of messages with a '10 New' indicator. The messages include 'PO changes rejected', 'Invoice Approval', and 'Invoice Approval'.
- Bottom Navigation:** A row of four tiles: 'Submit Invoice Supplier' (highlighted with a red box and an arrow from a callout box), 'View Material Purchase Orders', 'View Invoices Suppliers', and 'View Invoices Suppliers'.

A callout box on the left side of the 'Submit Invoice Supplier' tile shows an upward arrow icon and the number '250'. A dark green callout box at the bottom center contains the text 'Click the Submit Invoice Tile' with an arrow pointing to the highlighted tile.

1. Access Submit Invoice Tile – Landing Page

The screenshot shows the LUMEN Submit Invoice interface. At the top, there's a navigation bar with 'LUMEN' and 'Submit Invoice' dropdown, a search bar, and a user profile icon 'rv'. Below the navigation, the main heading is 'Submit Invoice'. A callout box points to a 'Value by Purchase Order Status' section, which displays a bar chart with 'Invoiced' at 3,424.66 K and 'Open' at 4,114.27 K, with a total 'To Be Invoiced' of 194.58 K. Another callout points to a filters section containing various search criteria like Contract, Created On, Contract Category, RFQ, Purchase Order, Supplier PO Ref#, Wire Center, Responsible Person, CPA, Project, Type, and Invoice Submission Due Date. A third callout points to a 'Purchasing Documents (126)' table. The table has columns for Project, Description, Purchase Order, Supplier PO Ref#, Invoiced, To Be Invoiced, Act. Work Compl..., Invoice Submissi..., and Value. The first row shows a 'Testing Project' with PO 250000189, 42,000.00 USD Invoiced, and 51,450.00 USD To Be Invoiced. A callout points to a right-pointing arrow at the end of this row. A fourth callout points to the 'Go' button in the filters section.

Value by Purchase Order Status

Invoiced	3,424.66 K
Open	4,114.27 K
To Be Invoiced	194.58 K

The Micro Chart section provides a quick visual summary of the invoiceable purchase order value before you open a specific PO. Use it as a quick checkpoint to understand what amount is already invoiced, what amount remains open, and what value is still ready to be billed.

Use the **Filters** section to narrow the purchase orders displayed below, so you can quickly find the correct record ready for invoicing.

Select the **arrow** at the end of the line to continue into the invoice process.

The Purchasing Documents Table. Use this table to review the purchase orders assigned to your company and identify which records are ready for invoicing.

2. Invoice Detail Page

Submit or Cancel Invoice

Invoice Header
The header briefly gives you the main invoice details. It combines prefilled information from the PO and Goods Receipt with the supplier-entered fields needed to complete the invoice before submission.

Invoice Creation for 2700000002

*Supplier Invoice Ref #:

Submitted Date: 03/23/2026

*Supplier Invoice Date:

Payment Terms:

Currency: USD

Supplier Contact: rvptest vu1

Final Destination: NEW YORK, NY

Comments:

IBM North America
Lafayette
NEW YORK NEW YORK New York
10013
US (USA)

Qwest Corporation
931 14th Street
Denver Colorado
80202
US (USA)

Submit Invoice Cancel

The Invoice is built from the purchase order and the completed Goods Receipt activity already recorded for that PO.

Invoice Items Section
Each row in this section represents work that has already been Goods Received and is now eligible for invoicing. Use this area to validate the billed lines, confirm quantities and pricing, enter taxes where applicable, review receipt comments, and control whether a line stays on the current invoice

#	WBS Element	PO Line Item	Assembly Unit	Confi...	Invoice Quan...	UoM	Price Per Unit (USD)	Vendor Mater... Tax %	Minor Mater... Tax %	Labor Tax %	Freight Tax %	Amount (USD)	GR Com...	Re... From Invo...
1	M.1600.0001384.C.AA NN	00001	PROJECT BID - ENGINEERING 5100040	10.00	1.00	AU	442.88	0.00	0.00	0.00	0.00	442.88		
3	M.1600.0001384.C.AA NN	00002	GROUND GRID 5/8in-8ft ROD 5100041	2.00	1.00	AU	56.49	0.00	0.00	0.00	0.00	56.49		
5	M.1600.0001384.C.AA NN	00005	*BFC100-19D 5100044	10.00	1.00	AU	884.98	0.00	0.00	0.00	0.00	884.98		

Attachments Section

Attachments +

No files found.

Drop files to upload, or use the "+" button. Maximum file size is 25 MB.

Amounts

Invoice Amount (USD): 1,384.35

Tax Amount (USD): 0.00

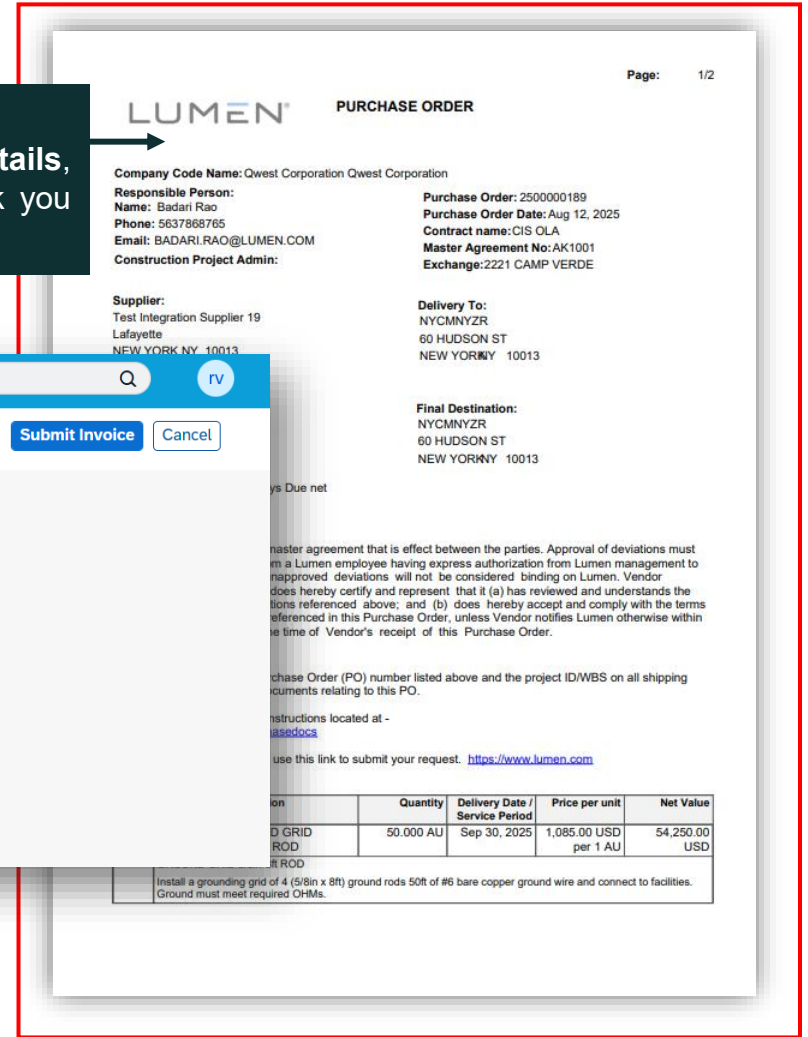
Total (USD): 1,384.35

Amount Section

3. Enter Invoice Data - Header

The **Purchase Order (PO) number** is displayed in the title bar, so you know which document you are invoicing.

Use the **PDF Icon** to download. Use this PDF to review the original **purchase order details**, confirm the PO information, and cross-check the work you are invoicing before submission.



LUMEN Submit Invoice Search rv

Invoice Creation for 2700000002

Supplier
IBM North America
Lafayette
NEW YORK NEW YORK New York
10013
US (USA)

Customer
Qwest Corporation
931 14th Street
Denver Colorado
80202
US (USA)

Responsible Person:
*Supplier Invoice Ref #:

Submitted Date: 03/23/2026

*Supplier Invoice Date:

Payment Terms:
Currency: USD
Supplier Contact: rvptest vu1
Final Destination: NEW YORK, NY

Comments:

Submit Invoice **Cancel**

Insert Optional Comments

Enter, Supplier Invoice Ref # (Mandatory)
Your invoice reference number. This is the supplier's own identifier for the invoice and is one of the main fields you enter when creating an invoice.

Enter Supplier Invoice Date (Mandatory)
The invoice date is set by you as the supplier. It defaults during creation and can be adjusted before submission.

3. Invoice Item Section

Each Invoice line is displayed with the key details you need to review before submission

Review the prefilled line information carefully before continuing.

WBS Element, PO Line Item, Assembly Unit, Confirmed PO Quantity, Invoice Quantity, UoM, Price Per Unit, and Amount (USD)

A line may already be Goods Received and technically ready for invoicing, but you may not be ready to bill it in the current invoice. Removing the line lets you submit the rest of the invoice now and bill that specific line later a new invoice for the same PO. **Click on the Trash Icon**

#	WBS Element	PO Line Item	Assembly Unit	Confir...	Invoice Quantity	UoM	Price Per Unit (USD)	Vendor Material Tax %	Minor Material Tax %	Labor Tax %	Freight Tax %	Amount (USD)	GR Comm...	Remove From Invoice
1	M.1600.0001384.C.AANN	00001	PROJECT BID - ENGINEERING 5100040	10.00	1.00	AU	442.88	0.00	0.00	0.00	0.00	442.88		
3	M.1600.0001384.C.AANN	00002	GROUND GRID 5/8in-8ft ROD 5100041	2.00	1.00	AU	56.49	0.00	0.00	0.00	0.00	56.49		
5	M.1600.0001384.C.AANN	00005	*BFC100-19D 5100044	10.00	1.00	AU	884.98	0.00	0.00	0.00	0.00	884.98		

If a comment was entered during the Goods Receipt, the GR Comment Icon is highlighted in a darker shade. **Click the Icon** to display the note entered when the Goods Receipt was completed. After reviewing it, click Close.

3. Enter Invoice Data - Taxes

Enter the applicable Tax Percentages.

Tax fields are editable only when the corresponding component applies to that specific PO/AU line. If a component does not apply, the related Tax field remains read-only. This prevents taxes from being entered for components that are not part of the billed line.

#	WBS Element	PO Line Item	Assembly Unit	Confir...	Invoice Quantity	UoM	Price Per Unit (USD)	Vendor Material Tax %	Minor Material Tax %	Labor Tax %	Freight Tax %	Amount (USD)	GR Comm...	Remove From Invoice
1	M.1600.0001384.C.AANN	00001	PROJECT BID - ENGINEERING 5100040	10.00	1.00	AU	442.88	0.00	0.00	0.00	0.00	442.88		
3	M.1600.0001384.C.AANN	00002	GROUND GRID 5/8in-8ft ROD 5100041	2.00	1.00	AU	56.49	0.00	0.00	0.00	0.00	56.49		
5	M.1600.0001384.C.AANN	00005	*BFC100-19D 5100044	10.00	1.00	AU	884.98	0.00	0.00	0.00	0.00	884.98		

Vendor Material Tax %	Minor Material Tax %	Labor Tax %	Freight Tax %	Amount (USD)	GR Comm...
0.00	0.00	0.00	0.00	180.00	
0.00	0.00	0.00	0.00	120.00	
0.00	0.00	0.00	0.00	100.00	
0.00	0.00	0.00	0.00	180.00	

Fill the editable field with the Tax amount for each line

Vendor Material Tax %	Minor Material Tax %	Labor Tax %	Freight Tax %	Amount (USD)	GR Comm...
0.00	7	10	0.00	196.20	
0.00	7	10	0.00	130.80	
0.00	0.00	10	0.00	110.00	
0.00	7	10	0.00	196.80	

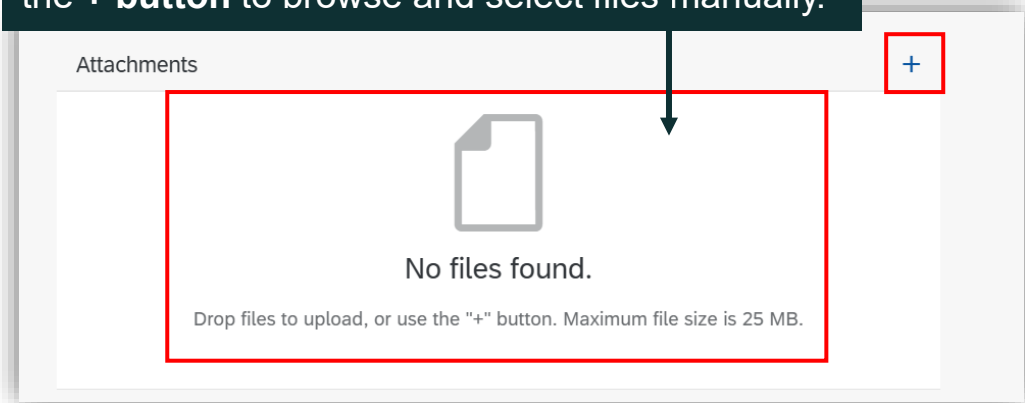
When the first applicable tax value is entered, PGW populates the remaining applicable lines to speed up invoice entry

Vendor Material Tax %	Minor Material Tax %	Labor Tax %	Freight Tax %	Amount (USD)	GR Comm...
0.00	7	7.5	0.00	193.20	
0.00	8	10	0.00	131.20	
0.00	0.00	10	0.00	110.00	
0.00	8	10	0.00	197.20	

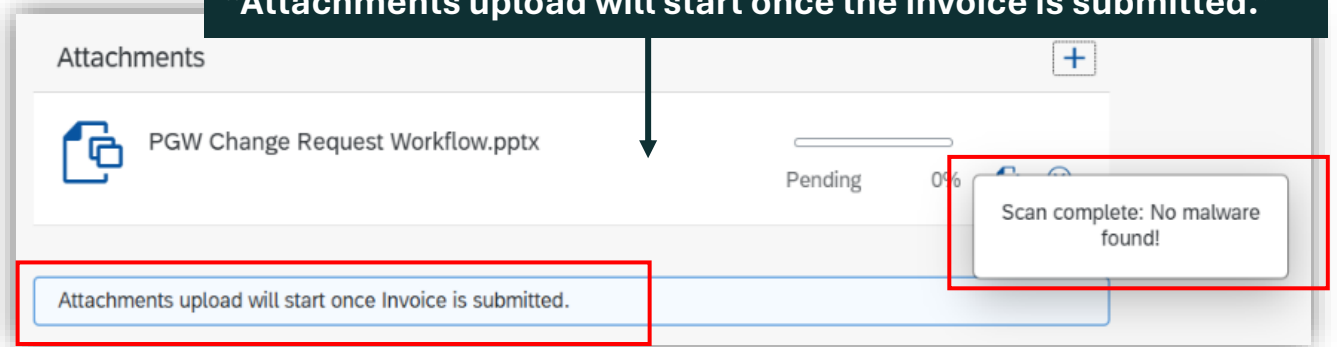
Each editable line can still be adjusted individually if a different tax percentage is needed.

3. Enter Invoice Data - Attachments

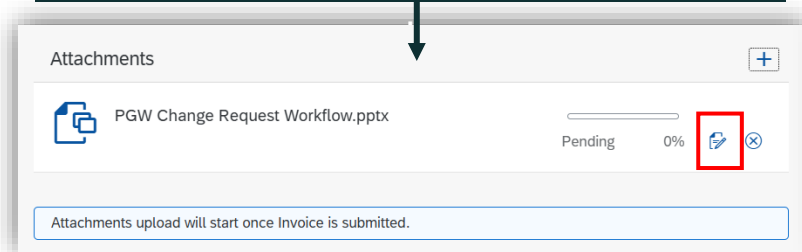
Upload supporting files by **dragging and dropping** them into the upload area or by clicking the **+** button to browse and select files manually.



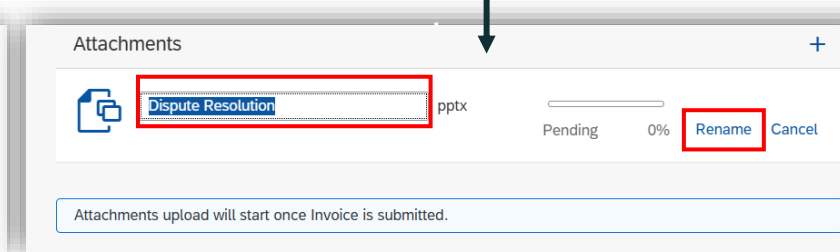
After the scan completes and no malware is found, an instructional message is displayed in the Attachments section: **"Attachments upload will start once the invoice is submitted."**



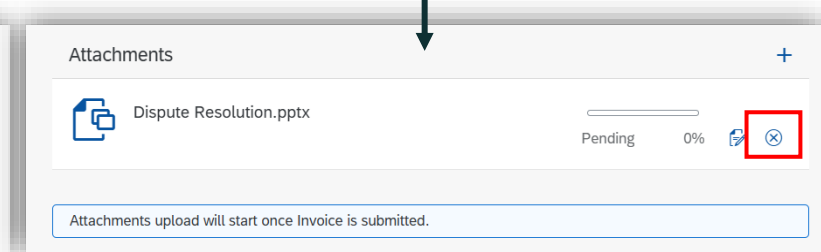
To Modify a file name, click the **Edit icon (page with a pencil)** at the end of the row



Enter the new name for the file, then click the **Rename** button.



To remove a file, click the **X icon** at the end of the row.



4. Submit the Invoice

Click **Submit Invoice** to validate the invoice details.

#	WBS Element	PO Line Item	Assembly Unit	Confr...	Invoice Quantity	UoM	Price Per Unit (USD)	Vendor Material Tax %	Minor Material Tax %	Labor Tax %	Freight Tax %	Amount (USD)	GR Comm...	Remove From Invoice
1	E.1600.0000299.C.AANN	00001	PROJECT BID - ENGINEERING 5100040		2000.00	5.00	AU 1,660.00	10	10	7	0	8,762.50		

Amounts	
Invoice Amount (USD):	8,300.00
Tax Amount (USD):	462.50
Total (USD):	8,762.50

Before submitting the invoice, review the Amounts section to confirm the final values are correct. Verify the Invoice Amount, Tax Amount, and Total to make sure the billed value and the taxes entered on the invoice lines are reflected correctly in the final invoice total.

If any tax percentage exceeds the tolerance limits, the system displays an error message: *"Error: The tax rate exceeds the limits based on the tax jurisdiction. Update the tax percentages to within range to submit."*

Error submitting the invoice. Calculated Tax Amount over tolerance..

Close

Click **Close**, review the taxes, and resubmit the invoice.

If all values are within tolerance, the system displays the message: "Your invoice creation request has been submitted."

Your invoice creation request has been submitted.

5. Lumen approval begins after the supplier submission.

- After you submit the invoice in **PGW**, the system validates the invoice details, including the required fields and tax checks. If the invoice passes validation, it is created in **S/4** and moves into the **Lumen approval workflow**. At this stage, the invoice shows as **Pending for Approval**, which means your submission was successful, but Lumen still needs to review and approve it before it can continue in the payment process. If Lumen approves the invoice, the status moves to **Invoice Approved**, meaning the invoice is posted and can continue to payment processing. If Lumen rejects the invoice, the status becomes **Rejected**, and you must create a **new invoice**. If an issue is found after posting, such as a payment hold or compliance issue, the invoice may move to **Blocked for Payment** until the issue is resolved.

6. Track the Invoice in View Invoices

- After you submit the invoice, use **View Invoices** to track it through the next stages of the process. This Tile lets you monitor the invoice status, review the invoice details, and confirm whether the invoice is **Pending for Approval, Approved, Blocked for Payment, Partially Paid, Remitted, Cancelled, or Rejected**.
- In **View Invoices**, you can also review the submitted invoice information, download the available **Invoice PDF** or **Remittance PDF**, open the **Account Statement**, review attachments, and follow up on payment-related details such as **remittance, retainage, and deductions**.

The screenshot displays the Lumen Procurement Gateway dashboard. At the top, there's a blue header with 'LUMEN Home' and a search icon. Below the header, the 'Procurement Gateway' section features a large orange banner with the text 'Lumen Procurement Gateway'. Underneath, an 'Action Center' provides a summary of key metrics: Open RFQs (28), OLARFO POs Pending Supplier Action (54), CMS POs Pending Supplier Action (177), Service Drop POs Pending Supplier Action (148), POs Ready to Invoice (140), and Invoices Rejected (79). A 'Message Center' section below lists recent notifications, including PO changes rejected, invoice approvals, and PO CR approvals. At the bottom, a row of tiles includes 'View Invoices Suppliers' (241), 'Manage Purchase Orders', 'View Material Purchase Orders', 'Submit Invoice Supplier' (282), and 'View Invoices Suppliers' (176). The 'View Invoices Suppliers' tile with 176 is highlighted with a red border, and a dark green callout box with the text 'Click the View Invoice Tile' points to it.

6. Track the Invoice in View Invoices

The screenshot shows the LUMEN 'View Invoices' page. At the top, there's a search bar and a 'View Account Statement' link. Below the header, a 'Value by Invoice Status' chart shows USD values for 'Approved' (147.88 K), 'Remitted' (1,466.10 K), and 'Blocked for payment' (32.85 K). A callout points to the 'Blocked for payment' value. Below the chart is a 'Filters' section with various input fields for Contract, Supplier Invoice Ref#, CPA, Invoice Date, Status, Days Net, PO Type, Wire Center, and Responsible Person. A callout points to this section. Below the filters is an 'Invoice Created (455)' table with columns for Supplier Invoice Ref#, Invoice, Purchase Order, Project Description, Amount, Status, Invoice Date, Payment Due Date, Days Net, and Latest Remittance Date. A callout points to the table, and another callout points to a right-pointing arrow at the end of a row in the table.

The left highlights the value currently **Blocked for Payment**, while the chart on the right compares the values for **Approved, Remitted, and Blocked for Payment**. This helps you quickly identify whether your invoices are moving normally through the process or whether a specific status may require follow-up

The **Filters** section to narrow the invoice list and quickly find the specific invoice you want to review.

Invoice Created Table
Use this table to confirm that you are opening the correct invoice and to quickly understand where that invoice stands in the process. Before opening a row, review the invoice reference, purchase order, status, amount, due date, remittance information, retainage, submitted date, and any deductions that may apply.

Select the **arrow** at the end of the line to continue into the invoice process.

6. Track the Invoice in View Invoices

After you select an invoice, the screen changes to split mode. The invoice list remains on the left, and the selected invoice details are displayed on the right. This view helps you review invoices more efficiently by allowing you to move between records without leaving the page or losing your search results

Use the toolbar to manage the split-screen view

Filters Section

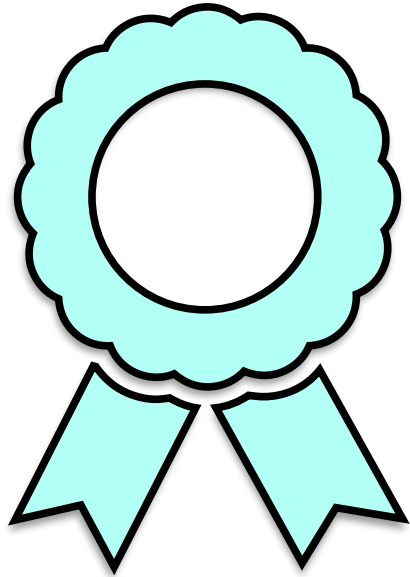
The Invoices List

The Invoice Detail

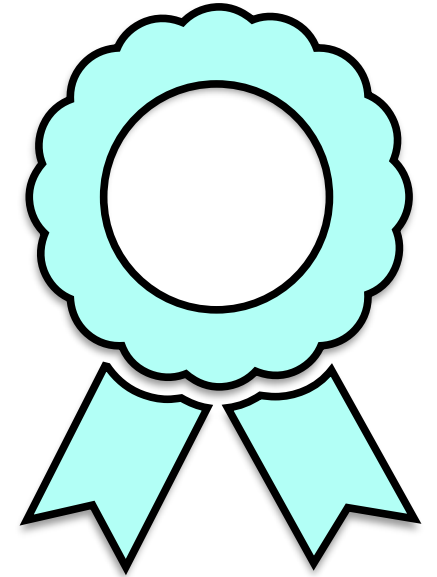
#	PO Line Item	Assembly Unit	WBS Element	Qty.	UoM	Price Per Unit (USD)	Vendor Material Tax %	Minor Material Tax %	Labor Tax %	Freight Tax %	Amount (USD)	Paymt. Block	GR Cmnt.
1	1	PROJECT BID - ENGINEERING	E.1600.00002 99.C.AANN	1.000	AU	1,660.00	0.00	0.00	0.00	0.00	1,660.00		

Amounts	
Invoice Amount (USD):	1,660.00
Tax Amount (USD):	0.00
Total (USD):	1,660.00

Course Completion



You have completed the
7. Submitting and Viewing Invoices



Congratulations!