

Metrolinx iSupplier Support

Editing & Cancelling Invoices in iSupplier

Introduction

Invoices can be edited or cancelled within the Metrolinx iSupplier portal depending on the invoice type and stage-in-progress the invoice is at. This guide will cover unsubmitted and submitted PO-based or non-PO based invoices.

PO-based Invoices:

Vendors will be unable to edit or cancel a PO-based invoice if it has already been submitted into the system. However, vendors will be able to edit or cancel “Unsubmitted” invoices. Knowing how to edit an unsubmitted invoice may be useful to troubleshoot an error message that the invoice number already exists when creating an invoice after multiple attempts (see screenshot below). This error message occurs if there is an existing draft / ‘unsubmitted’ or submitted invoice in the system with the same invoice number. The error can be resolved if the invoice containing the existing invoice number is “unsubmitted” and has not been cancelled - allowing it to be updated and submitted.

Error

The Invoice Number you have entered already exists. Please enter a unique Invoice Number.

Non-PO Based Invoices:

After a non-PO invoice has been submitted, if it has not yet been processed by Metrolinx, vendors will be able to “withdraw” an invoice within iSupplier. Once withdrawn, the invoice can be edited and resubmitted or cancelled. Similarly, if a non-PO based invoice has been rejected, the invoice can immediately be edited and resubmitted or cancelled.

The process for editing or cancelling “unsubmitted” non-PO based invoices is identical to “unsubmitted” PO-based invoices.



Learn how you can [update attachments / supporting documents](#) for invoices submitted through the Metrolinx iSupplier portal in the linked guide!

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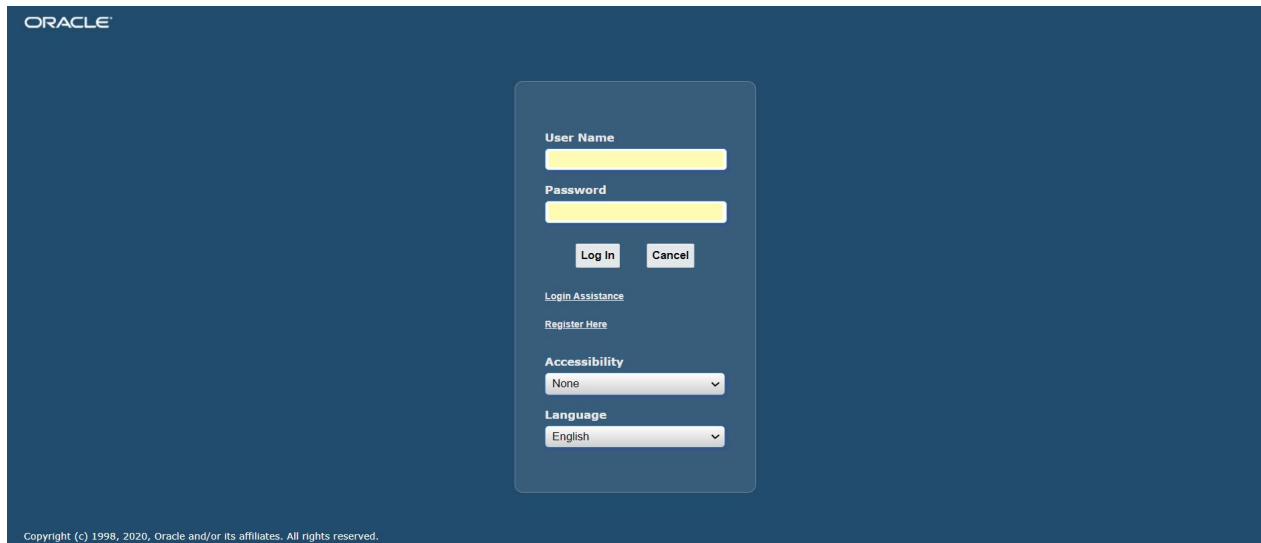
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A. UNSUBMITTED PO & NON-PO BASED INVOICES

A.I. How to Edit Unsubmitted PO and Non-PO Based Invoices

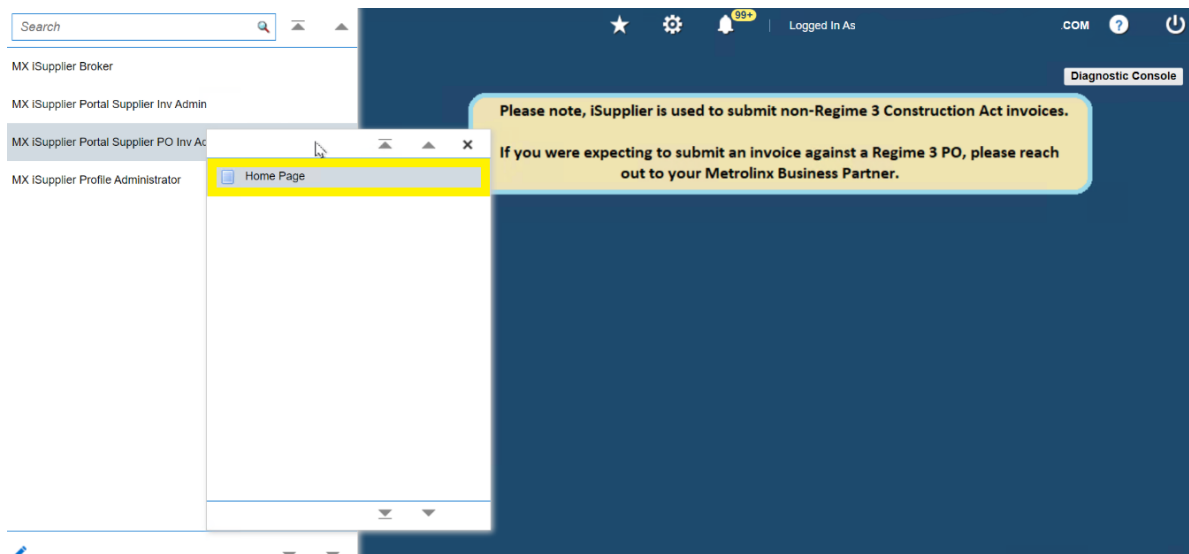
1. Login to iSupplier

Enter your User Name and Password to login to the [Metrolinx iSupplier Portal](#).



2. Navigate to 'Supplier Home'

On the top-left corner of the screen, click the 3 lines to open the side-menu and navigate to the "Home Page" under 'MX iSupplier Portal Supplier PO Inv Admin' for PO-based invoices or 'MX iSupplier Portal Inv Admin' for non-PO based invoices.



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3. Navigate to the Finance Tab

Click the 'Finance' tab at the top-left of the homepage.

The screenshot shows the Oracle iSupplier Portal homepage. The 'Finance' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search bar with a dropdown menu set to 'PO Number' and a 'Go' button. A disclaimer message is visible below the search bar. The main content area is divided into several sections: 'Notifications' with a table of recent messages, 'Orders At A Glance' with a table of open orders, and 'Shipments At A Glance'. On the right side, there is a 'Planning' sidebar with links to 'Orders', 'Shipments', 'Receipts', 'Invoices', and 'Payments'.

Subject	Date
Supplier Profile Management: Change in Bank Account Details for ACME Learning Ltd	07-Feb-2022 09:39:42
Bank Account Creation/Update message	03-Feb-2022 07:16:06
Bank Account Creation/Update message	03-Feb-2022 07:09:20
Invoice: 12822_CMD1 is Cancelled	28-Jan-2022 10:52:26
Supplier Profile Management: Approval of Bank Account	25-Jan-2022 03:29:51

PO Number	Description	Order Date
233228	IT Equipment (Monitor/Printer) - Delivery needed by 20 Feb	11-Feb-2022 02:15:24
233229	Technician visit charges	09-Feb-2022 03:30:47
233221	Technician visit to install equipment	28-Jan-2022 10:55:06
233220	Equipment and additional supplies	28-Jan-2022 10:19:45
233219	Consultation for design and delivery	28-Jan-2022 10:14:56

4. Search for the Invoice

In the 'Search' section, input the 'Invoice Number' and click 'Go'. The invoice should populate in the table beneath.

The screenshot shows the Oracle iSupplier Portal search interface for invoices. The 'Finance' tab is selected in the top navigation bar. Below the navigation bar, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. The 'Invoice Actions' section includes a 'Create Invoice' button and a 'With a PO' dropdown. The 'Search' section contains a note that the search is case insensitive and several input fields: 'Supplier', 'Invoice Number', 'Invoice Date From', 'Invoice Status', 'Purchase Order Number', 'Invoice Amount', 'Invoice Date To', and 'Currency'. A 'Go' button is highlighted in yellow. Below the search fields is a table with columns for 'Invoice Number', 'Invoice Date', 'Invoice Currency Code', 'Invoice Amount', 'Purchase Order', 'Status', 'Withdraw', 'Cancel', 'Update', and 'View Attachments'. The table currently shows 'No search conducted'.

NOTE:

- Alternatively, you may select "Unsubmitted Invoices" from the 'Invoice Status' field and click 'Go' to view all existing drafts / "unsubmitted" invoices in the system that can be edited and submitted or cancelled

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5. Edit Invoice

You may edit unsubmitted invoices by clicking the pencil icon in the 'Update' column.

Supplier Home Orders Shipments Finance

Create Invoices View Invoices View Payments

Invoice Actions Create Invoice Without a PO Go

Search

Note that the search is case insensitive

Supplier Purchase Order Number
Invoice Number Invoice Amount
Invoice Date From Invoice Date To
Invoice Status Currency

Go Clear

Supplier	Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments	Rejection	Comments
ABC Company	INV000123	30-Sep-2022	CAD	695.84	222123	Unsubmitted						

This will bring you to the invoice 'Details' page allowing you to edit and submit the invoice:

Supplier Home Orders Shipments Finance

Create Invoices View Invoices View Payments

Details Manage Tax Review and Submit

Create Invoice: Details Cancel Step 1 of 3 Next

* Indicates required field

Supplier

* Supplier ABC Company
Tax Payer ID
* Remit To
Address
Remit To Bank Account

Invoice

* Invoice Number INV000123
* Invoice Date 30-Sep-2022
* Currency
Invoice Description
Attachment

Customer

Customer Tax Payer ID
Customer Name
Address
Requester Email
Requester First Name
Requester Last Name

Items

Description	Quantity to Invoice	Unit Price	* Amount	Tax Rate Code	Remove Duplicate
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

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A.II. How to Cancel Unsubmitted PO and Non PO-Based Invoices

6. Cancel Invoice

You may cancel unsubmitted invoices by clicking the button in the 'Cancel' column

The screenshot shows the Oracle iSupplier Portal interface. At the top, there is a navigation bar with 'ORACLE iSupplier Portal' and 'Logged In As'. Below this, there are tabs for 'Supplier Home', 'Orders', 'Shipments', and 'Finance'. Under the 'Finance' tab, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. The main section is titled 'Invoice Actions' and includes a 'Create Invoice' button and a 'With a PO' dropdown menu. Below this is a search section with a note that the search is case insensitive. The search criteria include: Supplier (text input), Invoice Number (INV000123), Invoice Date From (14-May-2024), Invoice Status (Unsubmitted), Purchase Order Number, Invoice Amount, Invoice Date To, and Currency. Below the search criteria are 'Go' and 'Clear' buttons. The main content area displays a table of invoices with columns: Supplier, Invoice Number, Invoice Date, Invoice Currency Code, Invoice Amount, Purchase Order, Status, Withdraw, Cancel, Update, View Attachments, Rejection, and Comments. The first row shows an invoice for 'ABC Company' with Invoice Number 'INV000123', Invoice Date '30-Sep-2022', Invoice Currency Code 'CAD', Invoice Amount '695.84', Purchase Order '222123', and Status 'Unsubmitted'. The 'Cancel' button in the 'Cancel' column is highlighted with a yellow box.

A confirmation message should appear near the top of the screen:

Confirmation
Invoice INV000123 has been cancelled.

NOTE:

- After cancelling an unsubmitted invoice, the invoice number of the cancelled record cannot be used again for a new invoice submission

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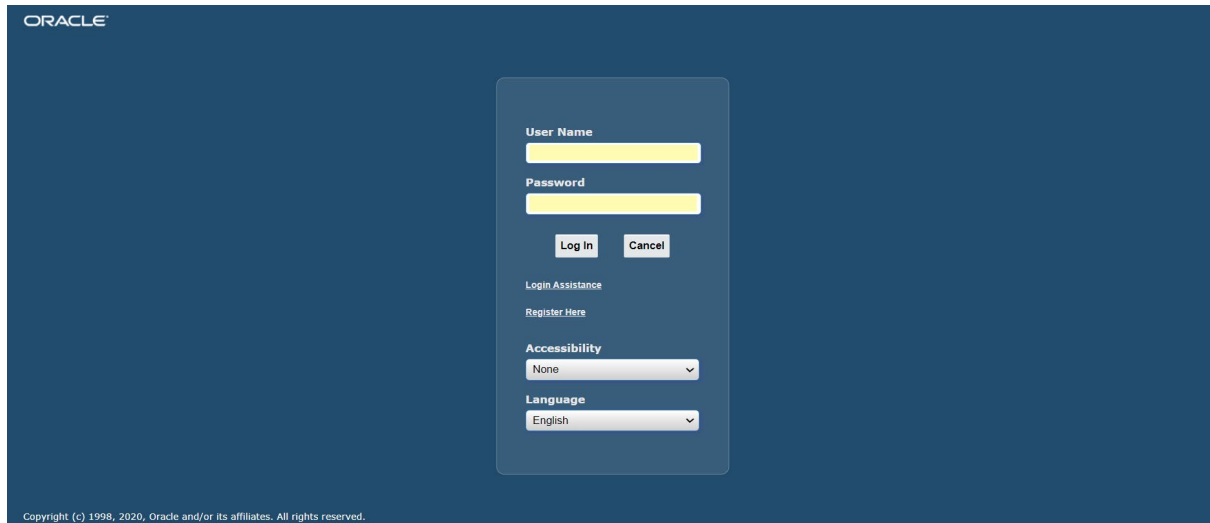
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B. SUBMITTED / REJECTED NON-PO INVOICES

B.I. How to Edit Submitted / Rejected Non PO-Based Invoices

1. Login to iSupplier

Enter your User Name and Password to login to the [Metrolinx iSupplier Portal](#).



ORACLE

User Name

Password

Log In Cancel

Login Assistance
Register Here

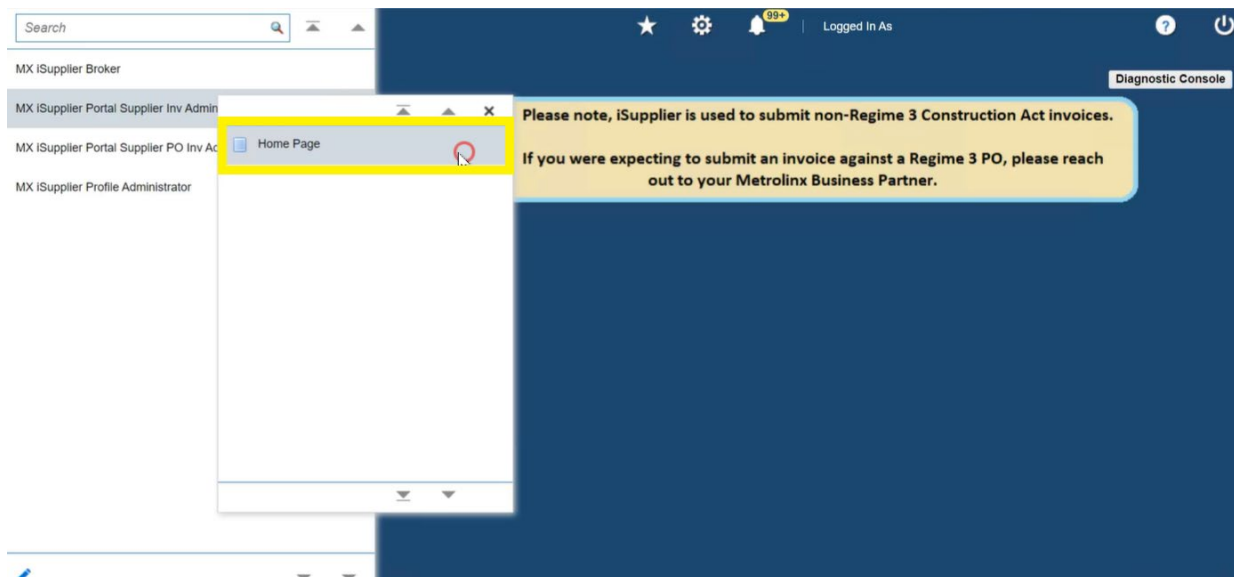
Accessibility
None

Language
English

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2. Navigate to 'Supplier Home'

On the top-left corner of the screen, click the 3 lines to open the side-menu and navigate to the "Home Page" under 'MX iSupplier Portal Supplier Inv Admin'.



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3. Navigate to the Finance Tab

Click the 'Finance' tab at the top-left of the homepage.

The screenshot shows the Oracle iSupplier Portal homepage. The 'Finance' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search section with a dropdown menu set to 'PO Number' and a 'Go' button. A disclaimer message is visible below the search section. The main content area is divided into several sections: 'Notifications', 'Orders At A Glance', and 'Shipments At A Glance'. The 'Notifications' section contains a table with columns for 'Subject' and 'Date'. The 'Orders At A Glance' section contains a table with columns for 'PO Number', 'Description', and 'Order Date'. The 'Shipments At A Glance' section is partially visible. On the right side, there is a 'Planning' sidebar with a tree view containing 'Orders', 'Shipments', 'Receipts', and 'Invoices'.

Subject	Date
Supplier Profile Management: Change in Bank Account Details for ACME Learning Ltd	07-Feb-2022 09:39:42
Bank Account Creation/Update message	03-Feb-2022 07:16:06
Bank Account Creation/Update message	03-Feb-2022 07:09:20
Invoice: 12822_CM01 is Cancelled	28-Jan-2022 10:52:26
Supplier Profile Management: Approval of Bank Account	25-Jan-2022 03:29:51

PO Number	Description	Order Date
233228	IT Equipment (Monitor/Printer) - Delivery needed by 20 Feb	11-Feb-2022 02:15:24
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233220	Equipment and additional supplies	28-Jan-2022 10:19:45
233219	Consultation for design and delivery	28-Jan-2022 10:14:56

4. Search for the Invoice

In the 'Search' section, input the 'Invoice Number' and click 'Go'. The invoice should populate in the table beneath.

The screenshot shows the Oracle iSupplier Portal 'Finance' tab search section. The 'Finance' tab is highlighted in the top navigation bar. Below the navigation bar, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. The 'Invoice Actions' section contains a 'Create Invoice' button and a 'With a PO' button. The 'Search' section contains a search form with fields for 'Supplier', 'Purchase Order Number', 'Invoice Number', 'Invoice Amount', 'Invoice Date From', 'Invoice Date To', 'Invoice Status', and 'Currency'. The 'Invoice Number' field is highlighted in yellow. Below the search form, there is a table with columns for 'Invoice Number', 'Invoice Date', 'Invoice Currency Code', 'Invoice Amount', 'Purchase Order', 'Status', 'Withdraw', 'Cancel', 'Update', and 'View Attachments'. The table is currently empty, with the text 'No search conducted' displayed below it.

Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments
No search conducted									

NOTE:

- You may use the 'Invoice Status' field to select a status and click 'Go' to view all applicable invoices. Selecting "In Process" will display non-PO invoices that can still be withdrawn which allows you to edit and resubmit or cancel the invoice. Selecting "Rejected" will display invoices that have been rejected which can be edited and resubmitted or cancelled.

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5. Withdraw Invoice

To edit a submitted non-PO based invoice that has not yet been processed, you will first need to 'withdraw' the invoice by clicking the icon in the 'Withdraw' column. **If you are working on a rejected non-PO based invoice, this step will not be required.**

The screenshot shows the Oracle iSupplier Portal interface. The top navigation bar includes the Oracle logo, 'iSupplier Portal', and user information. Below the navigation bar, there are tabs for 'Supplier Home', 'Orders', 'Shipments', and 'Finance'. Under the 'Finance' tab, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. The main section is titled 'Invoice Actions' and includes a search bar and a table of invoices. The 'Withdraw' button in the table is highlighted with a yellow box.

Supplier Home Orders Shipments Finance

Create Invoices View Invoices View Payments

Invoice Actions Create Invoice With a PO Go

Search

Note that the search is case insensitive

Supplier Purchase Order Number
Invoice Number INV000567 Invoice Amount
Invoice Date From (14-May-2024) Invoice Date To
Invoice Status Currency

Go Clear

Supplier	Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments	Rejection Comments
XYZ COMPANY	INV000567	14-Feb-2024	CAD	304.61		In Process					

A confirmation message should appear near the top of the screen and the invoice 'Status' will become "Unsubmitted" allowing you to go to [Step 6](#) of editing and resubmitting the invoice, or [Step 7](#) of cancelling the invoice entirely:

The screenshot shows the Oracle iSupplier Portal interface after the 'Withdraw' action. A yellow confirmation message is displayed at the top, stating 'Approval request for invoice number INV000567 has been withdrawn.' Below the message, the 'Invoice Actions' section is visible, and the 'Status' column in the table has changed to 'Unsubmitted'.

Supplier Home Orders Shipments Finance

Create Invoices View Invoices View Payments

Confirmation
Approval request for invoice number INV000567 has been withdrawn.

Invoice Actions Create Invoice With a PO Go

Search

Note that the search is case insensitive

Supplier Purchase Order Number
Invoice Number INV000567 Invoice Amount
Invoice Date From (31-May-2024) Invoice Date To
Invoice Status Currency

Go Clear

Supplier	Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments	Rejection Comments
XYZ COMPANY	INV000567	14-Feb-2024	CAD	304.61		Unsubmitted					

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6. Edit Invoice

You may edit a withdrawn or rejected non-PO based invoice by clicking the pencil icon in the 'Update' column.

The screenshot shows the Oracle iSupplier Portal interface. At the top, there's a navigation bar with 'ORACLE iSupplier Portal' and user information. Below it, there are tabs for 'Supplier Home', 'Orders', 'Shipments', and 'Finance'. Under 'Finance', there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. A yellow confirmation banner states: 'Approval request for invoice number INV000567 has been withdrawn.' Below this, there's an 'Invoice Actions' section with a 'Create Invoice' button and a 'With a PO' dropdown. A search section follows, with a note that the search is case insensitive. The search filters include Supplier, Invoice Number (INV000567), Invoice Date From (31-May-2024), Invoice Status, Purchase Order Number, Invoice Amount, Invoice Date To, and Currency. Below the search filters is a table of invoices:

Supplier	Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments	Rejection Comments
XYZ COMPANY	INV000567	14-Feb-2024	CAD	304.61		Unsubmitted					

NOTE:

- The above screenshot may look slightly different if you are working on a rejected non-PO based invoice. The only difference is that the 'Status' will show as "Rejected".

This will bring you to the invoice 'Details' page allowing you to revise and resubmit the invoice:

The screenshot shows the 'Create Invoice: Details' page in the Oracle iSupplier Portal. The page has a progress bar at the top with three steps: 'Details' (active), 'Manage Tax', and 'Review and Submit'. Below the progress bar, there are 'Cancel' and 'Next' buttons. The page is divided into several sections:

- Supplier:** Fields for Supplier (XYZ COMPANY), Tax Payer ID, Remit To, Address, and Remit to Bank Account.
- Invoice:** Fields for Invoice Number (INV000567), Invoice Date (14-Feb-2024), Currency, and Invoice Description. There is an 'Attachment' button with a plus sign.
- Customer:** Fields for Customer Tax Payer ID, Customer Name, Address, Requester Email, Requester First Name, and Requester Last Name.
- Items:** A table with columns: Description, Quantity to Invoice, Unit Price, Amount, Tax Rate Code, Remove, and Duplicate. The first row shows 'Description 1' with an amount of 304.61 and tax rate code EXC-APHST.

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B.II. How to Cancel Withdrawn or Rejected Non-PO Based Invoices

7. Cancel the Invoice

You may cancel a withdrawn or rejected non-PO based invoice by clicking the button in the 'Cancel' column.

The screenshot displays the Oracle iSupplier Portal interface. At the top, there is a navigation bar with the Oracle logo and 'iSupplier Portal' text. Below this, there are tabs for 'Supplier Home', 'Orders', 'Shipments', and 'Finance'. The 'Finance' tab is active. Underneath, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. A yellow confirmation banner at the top of the main content area reads: 'Confirmation: Approval request for invoice number INV000567 has been withdrawn.' Below this, there is an 'Invoice Actions' section with a 'Create Invoice' button and a 'With a PO' dropdown menu. A search section follows, with a note that the search is case insensitive. The search fields include: Supplier, Invoice Number (INV000567), Invoice Date From (31-May-2024), Invoice Status, Purchase Order Number, Invoice Amount, Invoice Date To, and Currency. Below the search fields is a table with the following data:

Supplier	Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments	Rejection Comments
XYZ COMPANY	INV000567	14-Feb-2024	CAD	304.61		Unsubmitted					

NOTE:

- The above screenshot may look slightly different if you are working on a rejected non-PO based invoice. The only difference is that the 'Status' will show as "Rejected".
- After cancelling the invoice, the invoice number of the cancelled record cannot be used again for a new invoice submission

A confirmation message should appear near the top of the screen:

The screenshot shows a yellow confirmation banner with a green checkmark icon and the text: 'Confirmation: Invoice INV000567 has been cancelled.'