Creating an Invoice

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- Billing Activity—You can only use those Activity Nbrs that you have been granted access.
- Receiving Activity—This number should be provided to you by the department requesting the good or service.
- Only those items created under that Billing Actv Nbr would prompt.
- Internal Ref field is optional only for the Billing Dept.
- All fields with an asterisk are required.
- Click “+” to add multiple lines in one invoice.
- After you've completed all necessary fields click

A Bill ID has now been populated. Click “OK”.

You must “Submit” to move it into workflow.

You can view Approvers

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Defining Items

Items represent the good or service offered by the selling department for a fee. Items **must be defined prior to creating an invoice.** This will be a unique item for every department.

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Modifying an Item

In some cases modifying an existing item is necessary. Examples of when this might be necessary include a change in price or a change in accounting information.

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Security Roles

Expense Managers, whether their department is the Seller or the Customer, will have access to approve automatically. Others users can obtain access via the Access Request Form (ARF), and authorized by organizational department approvers. Access is granted to the range of departments you input on the ARF form.

User roles are the following:

**Smart Billing - Bill Creator** – User is allowed to create/modify invoice. *(ARF # 017)*

**Smart Billing - Item Creator** – User is allowed to create new items & update existing items. *(ARF # 018)*

Terms

- Billing Activity is the Activity Nbr that provided the good or service.
- Receiving Activity is the Activity Nbr that received the good or service that needs to pay the billing dept.
- Every field with an asterisk (*) is a required field.
- Status should always be “Active”.
- When first creating an item **Effective Date** should always be left on the default 01/01/1901.
- Once the item is saved, a unique **Item ID** will populate.
- If you are using an Educational & General (E&G) account it should be Expense to Expense.
- Notice, once you add a record the “Eff Date” field populates the current date. Click “View All” to see both the original and the most updated record.
- Status should be “Active” in all versions as you update any fields such as Price, UOM and Accounts.