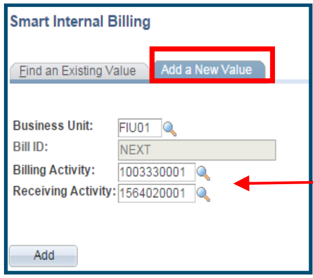
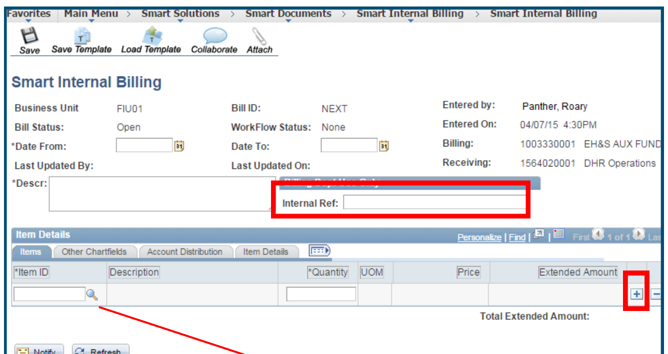
Creating an Invoice

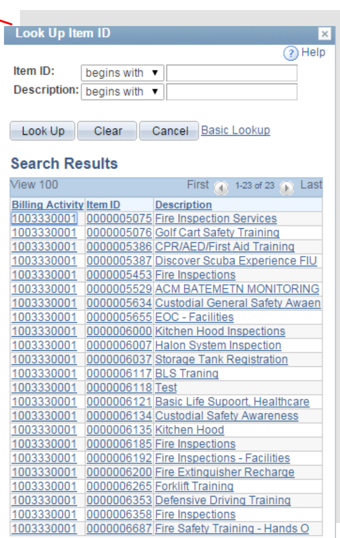
Navigation :

Main Menu>Smart Solutions>Smart Documents>Smart Internal Billing>Smart Internal Billing

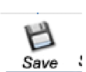


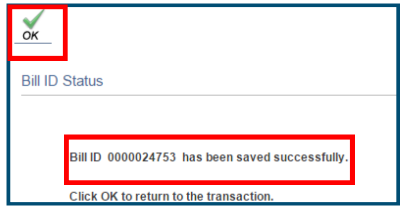
- Billing Activity—You can only use those Activity Nbrs that you have been granted access.
- Receiving Activity—This number should be provided to you by the department requesting the good or



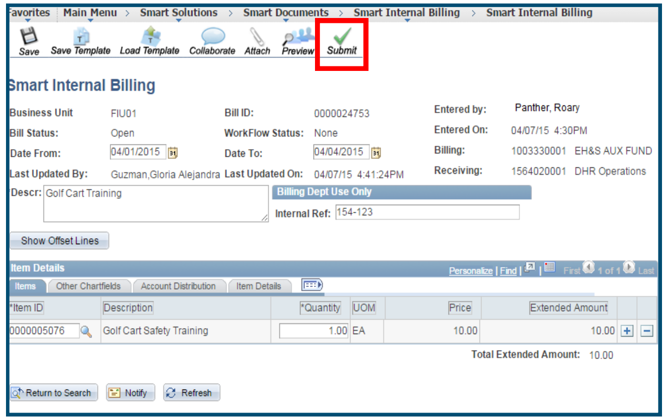


- Only those items created under that Billing Actv Nbr would prompt.
- **Internal Ref** field is optional only for the Billing Dept.
- All fields with an asterisk are required.
- Click **"+"** to add multiple lines in one invoice.
- After you've completed all necessary fields click

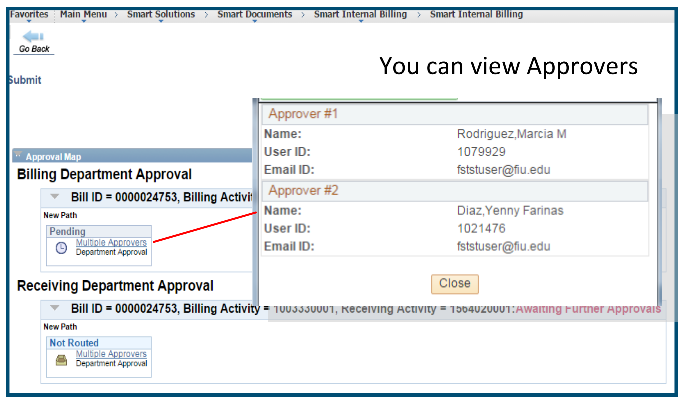


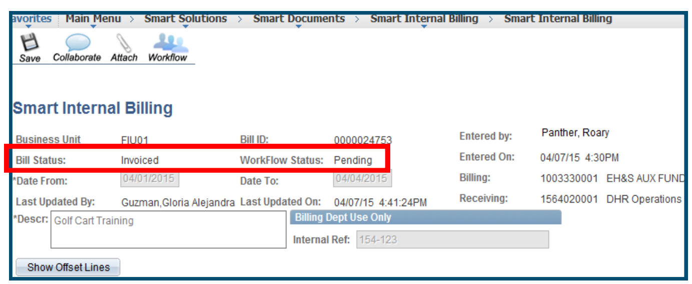


A Bill ID has now been populated. Click **"OK"**.



You must **"Submit"** to move it into workflow.





FIU
FLORIDA INTERNATIONAL UNIVERSITY

FIU PANTHERSOFT FINANCIAL SYSTEM

SMART INTERNAL BILLING

FIU | FLORIDA INTERNATIONAL UNIVERSITY

Tel: 305-348-7200

What is Smart Internal Billing?

This is an electronic invoicing tool that facilitates revenue collection from internal customers.

Are you a Customer or Seller?

As a Customer, you will contact the appropriate department to purchase a good or service for your area. The Customer's (**Receiving**) Department PI, Manager, Director etc., will have the authority to approve the purchase of the good or service.

The Selling (**Billing**) Department will provide the service or good and initiate the billing process. This department will have to define the items in the system prior to creating an invoice.

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)*

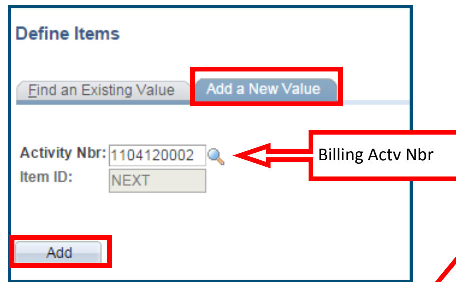
Terms

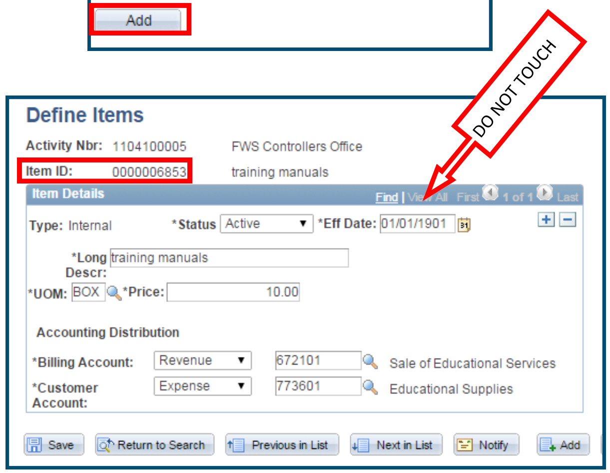
- Billing Activity is the Activity Nbr that provided the good or service.
- Receiving Activity is the Activity Nbr that received the good or service that needs to pay the billing dept.

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.

Navigation : **Main Menu>Smart Solutions>Smart Documents>Smart Internal Billing> Define Items**



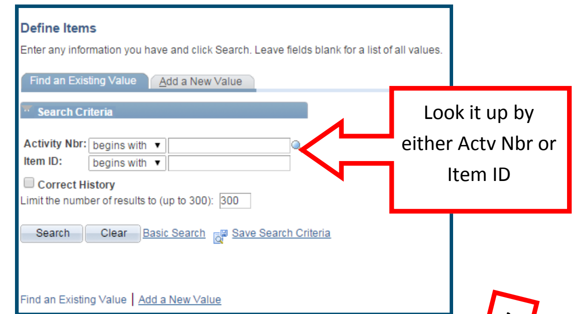


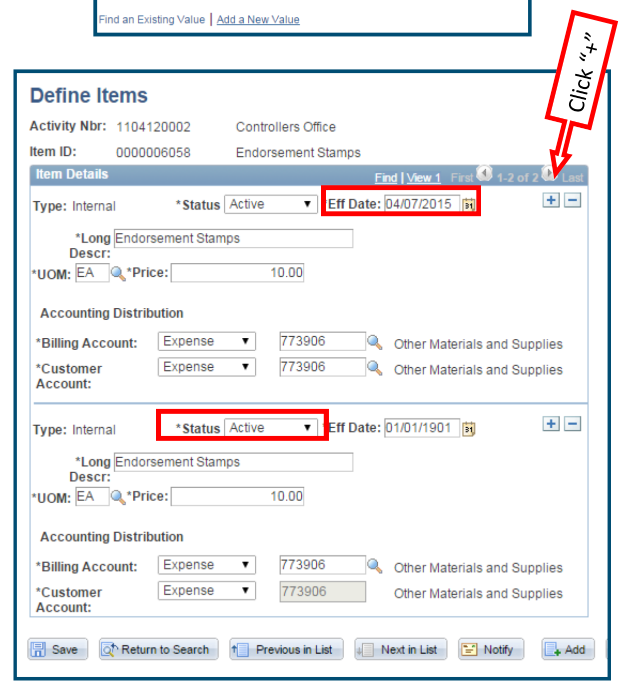
- Every field with an asterisk * is a required field.
- Status should always be **"Active".**
- When first creating an item **Effective Date** should always be left on the default 01/01/1901.
- Once the Item is saved, a unique **Item ID** will populate.
- If you are using an Educational & General (E&G) account it should be Expense to Expense.

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.

Navigation : **Main Menu>Smart Solutions>Smart Documents>Smart Internal Billing> Define Items**





- 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.