

Web Invoicing

Accounts Receivable Policy & Procedure

Policy:

<http://www.clemson.edu/cfo/businessmanual/as01pol.html>

Procedure:

<http://www.clemson.edu/cfo/businessmanual/as01proc.html>

Remember—Departments must be approved to invoice.
Please familiarize yourself with the policy and procedures before issuing an invoice.

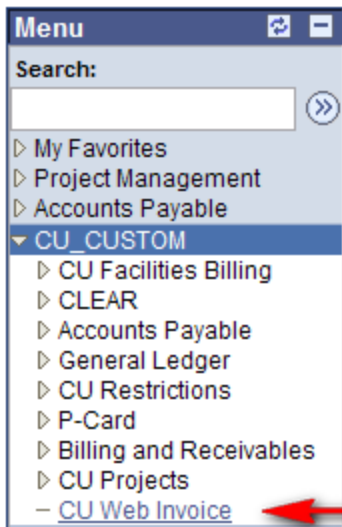
Learning Objectives

- Get to the Web Invoice Form
- Create a Customer Invoice
- Submit an Invoice
- Add or Update Customers
- Print Invoices
- Invoice Reports

Open the Form

PeopleSoft®

Personalize [Content](#) | [Layout](#)



Log into PeopleSoft and expand the CU_CUSTOM menu. Then Click on CU Web Invoice:

Search for an Existing Invoice

The default action of the Web Invoice page is to search for existing data. Click the yellow search button to see a list of all web invoices associated with your user ID:

The screenshot shows a web application interface for searching invoices. On the left is a vertical navigation menu with the following items: CU_CUSTOM, CU Facilities Billing, CLEAR, Accounts Payable, General Ledger, CU Restrictions, P-Card, Billing and Receivables, CU Projects, - CU Web Invoice (highlighted), Commitment Control, Reporting Tools, Customers, and Items. The main content area is titled 'Invoice' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' (highlighted) and 'Add a New Value'. A search form follows with the label 'Search by:' and a dropdown menu set to 'Invoice Number'. To the right of the dropdown is the text 'begins with' and an empty text input field. Below the search form are two links: 'Search' (highlighted in a yellow box) and 'Advanced Search' (underlined). At the bottom of the main area are two more links: 'Find an Existing Value' and 'Add a New Value' (underlined).

CU_CUSTOM

- CU Facilities Billing
- CLEAR
- Accounts Payable
- General Ledger
- CU Restrictions
- P-Card
- Billing and Receivables
- CU Projects
- CU Web Invoice
- Commitment Control
- Reporting Tools
- Customers
- Items

Invoice

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value [Add a New Value](#)

Search by: Invoice Number begins with

Search [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Create a New Invoice

To add a new web invoice, click the “Add a New Value” tab and click the yellow Add button. There is no need to change the sequence value; the application will do that automatically.

The screenshot shows a web application interface. On the left is a navigation menu with a tree structure. The 'CU Web Invoice' item is selected and highlighted in blue. The main content area is titled 'Invoice' and contains two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is active. Below the tabs is a text input field labeled 'CU Web Invoice Seq:' with the value '10' entered. A yellow 'Add' button is positioned below the input field. At the bottom of the main content area, there are two links: 'Find an Existing Value' and 'Add a New Value'.

- CU_CUSTOM
 - CU Facilities Billing
 - CLEAR
 - Accounts Payable
 - General Ledger
 - CU Restrictions
 - P-Card
 - Billing and Receivables
 - CU Projects
 - CU Web Invoice**
 - Commitment Control
 - Reporting Tools
 - Customers

Invoice

Find an Existing Value | **Add a New Value**

CU Web Invoice Seq:

Add

[Find an Existing Value](#) | [Add a New Value](#)

The web invoice page:

Invoice Number **NEXT**

Customer ID

*Location Code

Date Added

Billing Dept

Dept Phone

Description

Submit Invoice

Budget Period 2008YR

Invoice Status U

Gross Amt

Invoice Distribution								Customize Find		First 1 of 1 Last	
	Account	Fund Code	Department	Program Code	Class Field	Project	Amount				
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>		

☒ Expert Entry

Click the magnifying glass beside each field to see a list of available values:

Customer ID

Look Up Customer ID

Search by: Cust ID begins with

[Advanced Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All		First	1-100 of 300	Last
Cust ID	Cust. Name			
5400	Sony Pictures			
540006038	MATTHEW C WILSON			
540043533	LUMINITA H POJOGA			
540045243	MARGARET A MORGAN			
540065794	JAIMIE E PICCIONE			
5401	Army National Guard			
5401	Army National Guard			
540110330	SHANNON A CARMICHAEL			

Customer Advanced Lookup

Look Up Customer ID

Cust ID:

Cust. Name: SC


[Basic Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All		First	1-100 of 300	Last
Cust ID	Cust. Name			
3333	SC & Georgia Peach Councils			
6642	SC Academy of Science			
6642	SC Academy of Science			
8715	SC Alliance for Minority Participation			
9578	SC Alliance of Health Plans			
4103	SC Angus Association			

Customer Location

Once a customer ID is selected, click the lookup for the location code **Location Code** 

Look Up Location Code



Search by: Address Sequence Number =

Look Up

Cancel

[Advanced Lookup](#)

Search Results

View All								First  1-5 of 5  Last	
Address Sequence Number	Cust ID	Cust. Name	Address Line 1	Address Line 2	Address Line 4	City	State		
1	4247	Iptay	Collegiate Club	4933 University Station	Otis Pickett	Clemson	SC		
2	4247	Iptay	Operations	IPTAY Office	Mike Gilbert	Clemson	SC		
3	4247	Iptay	Operations	103D Jervey Athletic Center	George Bennett	Clemson	SC		
4	4247	Iptay	PO Box 1529	(blank)	Jim Davis	Clemson	SC		
5	4247	Iptay	IPTAY Building	(blank)	Sylvia Vaughn	Clemson	SC		

Invoice Number W0105151204

Customer ID 4247

*Location Code 3

Date Added 06/24/2008

Billing Dept 4001

Dept Phone 864/555-1212

Description Test add web invoice

Iptay

Operations

Clemson

SC 29634

103D Jervey Athletic Center

George Bennett

Submit Invoice

Budget Period 2008YR

Invoice Status U

Gross Amt

Invoice Distribution								Customize Find		First	1 of 1	Last
	Account	Fund Code	Department	Program Code	Class Field	Project	Amount					
1	1279	21	4001	505	257	2100154		+	-			

Save

Notify




















Refresh






Add

Update/Display

☒ Expert Entry

Distributions

Invoice Distribution								Customize Find 		First  1-2 of 2  Last
	Account	Fund Code	Department	Program Code	Class Field	Project	Amount			
1	4510 	12 	0201 	000 	157 	1200015 	50.00			
2	4510 	12 	0114 	000 	157 	1200029 	50.00			

 Save  Notify  Refresh  Add  Update/Display

☒ Expert Entry

Complete the Invoice Distribution Section by filling in complete chartfield string and amount.

To add additional accounting lines, click on the plus sign

To delete lines entered in error, click the minus sign

Note: Expense accounts may not be used on web invoices

Final Invoice

When your invoice is complete, click on the submit invoice yellow button. (You may also save an invoice to be submitted later.)
Once you have submitted the invoice, the fields become read only.

Invoice Number W5307173491

Customer ID ARAMARK
PO Drawer 429
CLEMSON
SC 29633

*Location Code

Date Added

Billing Dept

Dept Phone

Description

[Add New Customer](#)
[Update Existing Customer](#)
[Submit Invoice](#)

Budget Period 2008YR
Invoice Status S
Gross Amt 100.000

Invoice Distribution							Customize Find	First	1-2 of 2	Last
	Account	Fund Code	Department	Program Code	Class Field	Project	Amount			
1	4510	12	0201	000	157	1200015	50.000	+	-	
2	4510	12	0114	000	157	1200029	50.000	+	-	

[Save](#) [Return to Search](#) [Next in List](#) [Previous in List](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

☒ Expert Entry

You may print this page for your records.

View an Existing Invoice

[Find an Existing Value](#)[Add a New Value](#)

Invoice Number:

Invoice Status:

CU Web Invoice Seq:

Customer ID:

Date Added:

[Search](#)[Clear](#)[Basic Search](#)[Save Search Criteria](#)

Search Results

View All					
			First 1-8 of 8 Last		
Invoice Number	Invoice Status	Customer ID	Name	Gross Invoice Amount	Date Added
F0125172448	Processed	12942	South Carolina Association for Nonprofit	10000	25-APR-08
W0503158380	Processed	6929	SC Architectual Examiners Board	15000	20-NOV-07
W0721157472	Processed	4880	Univ of South Carolina	2000	12-NOV-07
W1309169986	Processed	12860	Council of Economic Advisers	62112.1	28-MAR-08
W5307173490	Unfinished	4103	SC Angus Association	0	27-OCT-08
W5307173491	Unfinished	2033	ARAMARK	100	27-OCT-08
W5307173492	Submitted	2033	ARAMARK	0	27-OCT-08
W5673173494	Unfinished	2033	ARAMARK	100	27-OCT-08

[Find an Existing Value](#) | [Add a New Value](#)

Add/Update Customers

Invoice Number	W5307173495		Add New Customer
*Customer ID	<input type="text" value="2033"/>	ARAMARK	Update Existing Customer
*Location Code	<input type="text" value="1"/>	PO Drawer 429	<input type="button" value="Submit Invoice"/>
*Date Added	<input type="text" value="10/29/2008"/>	CLEMSON	Budget Period 2008YR
*Billing Dept	<input type="text" value="5307"/>	SC 29633	Invoice Status S
Dept Phone	<input type="text" value="864/656-7315"/>		Gross Amt

To add a customer to the customer data base use the Add New Customer Link.

To update an existing customer's information, add an address, contact, etc. use The Update Existing Customer link.

Customer Addition Form

Customer Addition Form

Customer Name	<input type="text"/>
Federal Tax ID:	<input type="text"/> <i>(Not Required)</i>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Address Line 4	<input type="text"/>
City/Town 1	<input type="text"/>
State	<input type="text"/>
Country	<input type="text"/>
Zip Code	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>

☐ Check here if customer is a student.

Comments

Name of person making request	<input type="text"/>
Email of person making request	<input type="text" value="@clemson.edu"/>

Submit

Reset

Customer Update Form

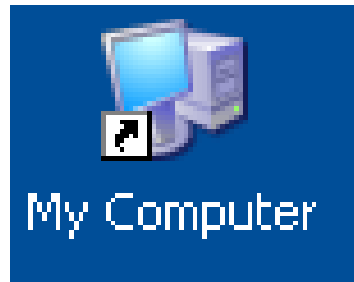
Customer Update Form

Customer Name	<input type="text"/>
PeopleSoft Customer #	<input type="text"/> (4 Digits)
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Address Line 4	<input type="text"/>
City/Town	<input type="text"/>
State	<input type="text" value="v"/>
Country	<input type="text"/>
Zip Code	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Comments	<input type="text"/>
Contact/Attention	
To:	
Name	<input type="text"/>
Phone	<input type="text"/>
Name of person making request	<input type="text"/>
Email of person making request	<input type="text" value="@clemson.edu"/>

Reports

- Invoices
- Shortcut to Billing Invoice Errors
- Shortcut to Billing Invoice Payments
- Invoice Aging

Invoices



CUBSRPT



Invoices



19-OCT-2005



20-OCT-2005



21-OCT-2005



24-OCT-2005



25-OCT-2005



26-OCT-2005



27-OCT-2005



28-OCT-2005



31-OCT-2005



Prior Months



0315.PDF

Adobe Acrobat Document
52 KB



0726.PDF


Adobe Acrobat Documen
58 KB



5608.PDF

Adobe Acrobat Document
52 KB

The Invoice

Clemson University INVOICE			
DATE: 21-06-2006		INVOICE NUMBER: 001002626	
To: Canadian Food Inspection Agency P.O. Box 11100 Station H 3601 Bayview Road Ottawa, ON M2H 5P6 Canada		Billing Dept.: 0915-Katzenberg, Soils & Plant Sci Billing Dept. Phone: (864)556-7465 Terms: Payable Upon Receipt Remit To: Clemson University University Accounting Winters' Hall Box 343307 Clemson, S.C. 29634-3307 Telephone: (864)656-2604 Facsimile ID 87-6816154	
Please make check payable to Clemson University and indicate invoice number as remittance advice.			
DESCRIPTION OF CHARGES			
Registration for Dr. Sun to attend Clemson University Women's Identification Short Course, September 10-17, 2006. Cost is \$750.00 US Dollars. Reference: #0 000001			
		Net Due	\$750.00
TERMS: Accounts not paid within 30 days are subject to collection costs.			

Business Systems Data Warehouse Reports

<https://busdwh.clemson.edu/>

- Shortcut to Billing Invoice Errors
- Shortcut to Billing Invoice Payments
- Invoice Aging

Other Invoicing Reports

DW.DW_FO_REGS_UNAPPROVED						
<input type="checkbox"/>		Shortcut to Billing Invoice Errors DW.DW_FO_REGS_UNAPPROVED	Never run	Crystal Report	Administrator	0
<input type="checkbox"/>		Shortcut to Billing Invoice Errors View Latest Instance History Properties Report ID: FIN320 Displays a listing of Billing Invoice Errors. View used: DW.DW_BI_ERRORS_VW	Never run	Crystal Report	Administrator	0
<input type="checkbox"/>		Shortcut to Billing Invoice Payments for Current Period View Latest Instance History Properties Report ID: FIN301 Displays a listing of Billing Invoice Payments for the current period. View used: DW.DW_BI_INVOICE_PAID_VW	Never run	Crystal Report	Administrator	0
<input type="checkbox"/>		Shortcut to Billing Invoice Payments for Prior Period View Latest Instance History Properties Report ID: FIN301 Displays a listing of Billing Invoice Payments for the Prior period. View used: DW.DW_BI_INVOICE_PAID_VW	Never run	Crystal Report	Administrator	0