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

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:
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 web invoice page:

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 54

[Look Up] [Cancel] [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.

<table>
<thead>
<tr>
<th>Cust ID</th>
<th>Cust. Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>5400</td>
<td>Sony Pictures</td>
</tr>
<tr>
<td>540006038</td>
<td>MATTHEW C WILSON</td>
</tr>
<tr>
<td>540043533</td>
<td>LUMINITA H POJOJA</td>
</tr>
<tr>
<td>540045243</td>
<td>MARGARET A MORGAN</td>
</tr>
<tr>
<td>540065794</td>
<td>JAIMIE E PICCIONE</td>
</tr>
<tr>
<td>5401</td>
<td>Army National Guard</td>
</tr>
<tr>
<td>5401</td>
<td>Army National Guard</td>
</tr>
<tr>
<td>540110330</td>
<td>SHANNON A CARMICHAEL</td>
</tr>
</tbody>
</table>
Customer Advanced Lookup

Look Up Customer ID

Cust ID:  [begins with]  [ ]
Cust. Name:  [begins with]  SC

[Look Up]  [Clear]  [ Cancel]  [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.

<table>
<thead>
<tr>
<th>Cust ID</th>
<th>Cust. Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>3333</td>
<td>SC &amp; Georgia Peach Councils</td>
</tr>
<tr>
<td>6642</td>
<td>SC Academy of Science</td>
</tr>
<tr>
<td>6642</td>
<td>SC Academy of Science</td>
</tr>
<tr>
<td>8715</td>
<td>SC Alliance for Minority Participation</td>
</tr>
<tr>
<td>9578</td>
<td>SC Alliance of Health Plans</td>
</tr>
<tr>
<td>4103</td>
<td>SC Angus Association</td>
</tr>
</tbody>
</table>
Customer Location

Once a customer ID is selected, click the lookup for the location code.

Look Up Location Code

Search by:  Address Sequence Number =

Look Up  Cancel  Advanced Lookup

Search Results

<table>
<thead>
<tr>
<th>View All</th>
<th>First</th>
<th>1-5 of 5</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Sequence Number</td>
<td>Cust ID</td>
<td>Cust. Name</td>
<td>Address Line 1</td>
</tr>
<tr>
<td>1</td>
<td>4247</td>
<td>Iptay</td>
<td>Collegiate Club</td>
</tr>
<tr>
<td>2</td>
<td>4247</td>
<td>Iptay</td>
<td>Operations</td>
</tr>
<tr>
<td>3</td>
<td>4247</td>
<td>Iptay</td>
<td>Operations</td>
</tr>
<tr>
<td>4</td>
<td>4247</td>
<td>Iptay</td>
<td>PO Box 1529</td>
</tr>
<tr>
<td>5</td>
<td>4247</td>
<td>Iptay</td>
<td>IPTAY Building</td>
</tr>
<tr>
<td>Invoice Number</td>
<td>W0105151204</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer ID</td>
<td>4247</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location Code</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Added</td>
<td>06/24/2008</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Billing Dept</td>
<td>4001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept Phone</td>
<td>864/555-1212</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Test add web invoice</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invoice Status</td>
<td>U</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budget Period</td>
<td>2008YR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gross Amt</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Invoice Distribution**

<table>
<thead>
<tr>
<th>Account</th>
<th>Fund Code</th>
<th>Department</th>
<th>Program Code</th>
<th>Class Field</th>
<th>Project</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1279</td>
<td>4001</td>
<td>505</td>
<td>257</td>
<td>2100154</td>
<td></td>
</tr>
</tbody>
</table>

**Table Controls**

- Save
- Notify
- Refresh
- Add
- Update/Display
- Expert Entry
Distributions

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.

You may print this page for your records.
View an Existing Invoice

Find an Existing Value | Add a New Value

Find an Existing Value | Add a New Value

View All

<table>
<thead>
<tr>
<th>Invoice Number</th>
<th>Invoice Status</th>
<th>Customer ID</th>
<th>Name</th>
<th>Gross Invoice Amount</th>
<th>Date Added</th>
</tr>
</thead>
<tbody>
<tr>
<td>F0125172448</td>
<td>Processed</td>
<td>12942</td>
<td>South Carolina Association for Nonprofit</td>
<td>10000</td>
<td>25-APR-08</td>
</tr>
<tr>
<td>W0503158830</td>
<td>Processed</td>
<td>6929</td>
<td>SC Architectural Examiners Board</td>
<td>15000</td>
<td>20-NOV-07</td>
</tr>
<tr>
<td>W0721157472</td>
<td>Processed</td>
<td>4880</td>
<td>Unlv of South Carolina</td>
<td>2000</td>
<td>12-NOV-07</td>
</tr>
<tr>
<td>W1309169986</td>
<td>Processed</td>
<td>12860</td>
<td>Council of Economic Advisers</td>
<td>62112.1</td>
<td>28-MAR-08</td>
</tr>
<tr>
<td>W5307173490</td>
<td>Unfinished</td>
<td>4103</td>
<td>SC Angus Association</td>
<td>0</td>
<td>27-OCT-08</td>
</tr>
<tr>
<td>W5307173491</td>
<td>Unfinished</td>
<td>2033</td>
<td>ARAMARK</td>
<td>100</td>
<td>27-OCT-08</td>
</tr>
<tr>
<td>W5307173492</td>
<td>Submitted</td>
<td>2033</td>
<td>ARAMARK</td>
<td>0</td>
<td>27-OCT-08</td>
</tr>
<tr>
<td>W5673173494</td>
<td>Unfinished</td>
<td>2033</td>
<td>ARAMARK</td>
<td>100</td>
<td>27-OCT-08</td>
</tr>
</tbody>
</table>
Add/Update Customers

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 Name

Federal Tax ID: (Not Required)

Address Line 1
Address Line 2
Address Line 3
Address Line 4
City/Town 1
State
Country
Zip Code
Phone
Fax

☐ Check here if customer is a student.

Comments

Name of person making request
Email of person making request @clemson.edu

Submit  Reset
Customer Update Form

Customer Name
PeopleSoft Customer # (6 Digits)
Address Line 1
Address Line 2
Address Line 3
Address Line 4
City/Town
State
Country
Zip Code
Phone
Fax
Comments
Contact/Attention To:
Name
Phone
Name of person making request
Email of person making request
@clemson.edu

Submit Reset
Reports

• Invoices
• Shortcut to Billing Invoice Errors
• Shortcut to Billing Invoice Payments
• Invoice Aging
Invoices
The Invoice
Business Systems Data Warehouse Reports

https://busdwh.clemson.edu/

• Shortcut to Billing Invoice Errors
• Shortcut to Billing Invoice Payments
• Invoice Aging
Other Invoicing Reports

- Shortcut to Billing Invoice Errors
  - Report ID: FIN320 Displays a listing of Billing Invoice Errors. View used: DW.DW_BL_ERRORS_VW

- Shortcut to Billing Invoice Payments for Current Period
  - Report ID: FIN301 Displays a listing of Billing Invoice Payments for the current period. View used: DW.DW_BL_INVOICE_PAID_VW

- Shortcut to Billing Invoice Payments for Prior Period
  - Report ID: FIN301 Displays a listing of Billing Invoice Payments for the Prior period. View used: DW.DW_BL_INVOICE_PAID_VW