UWF Invoicing Program
User Guide

The University of West Florida

Controller's Office

11000 University Parkway

Pensacola, FL 32514

The UWF Invoicing Program is a centralized invoicing program for departments to use for billing vendors for departmental charges and/or services. The Invoicing Administrator (IA) must add Department Administrators (DA) and Department Users (DU). DA's manage the Users in their department. DA's must notify the IA of any additions or deletions to the users in their department.

Invoicing Department Administrators can create new invoices and approve invoices.

Invoicing Department Users can create invoices only.

To access the UWF Invoicing Program:
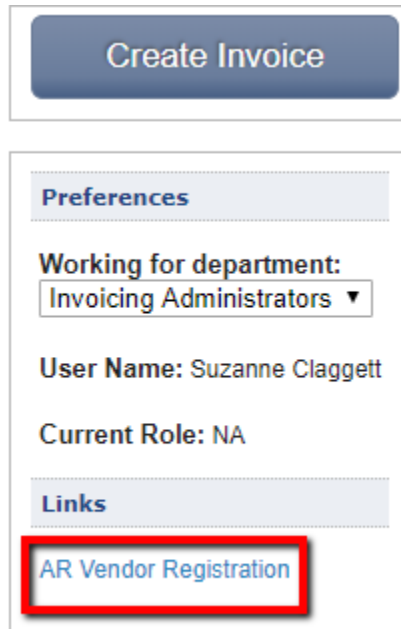
Sign in to MyUWF using your username and password.

Enter UWF Invoicing Program in the search function.

If you choose, you may "STAR" the program so it is on your home page.
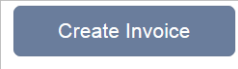
Section One:

Creating New Invoices

Vendors must be set up to create an invoice. If you need to create an invoice for a new vendor/customer, select the AR Vendor Registration link located on the left side of the Invoicing home page. Use the "search" function to verify the vendor does not exist before requesting a new vendor setup. When requesting a new vendor all fields with * are required before submitting.
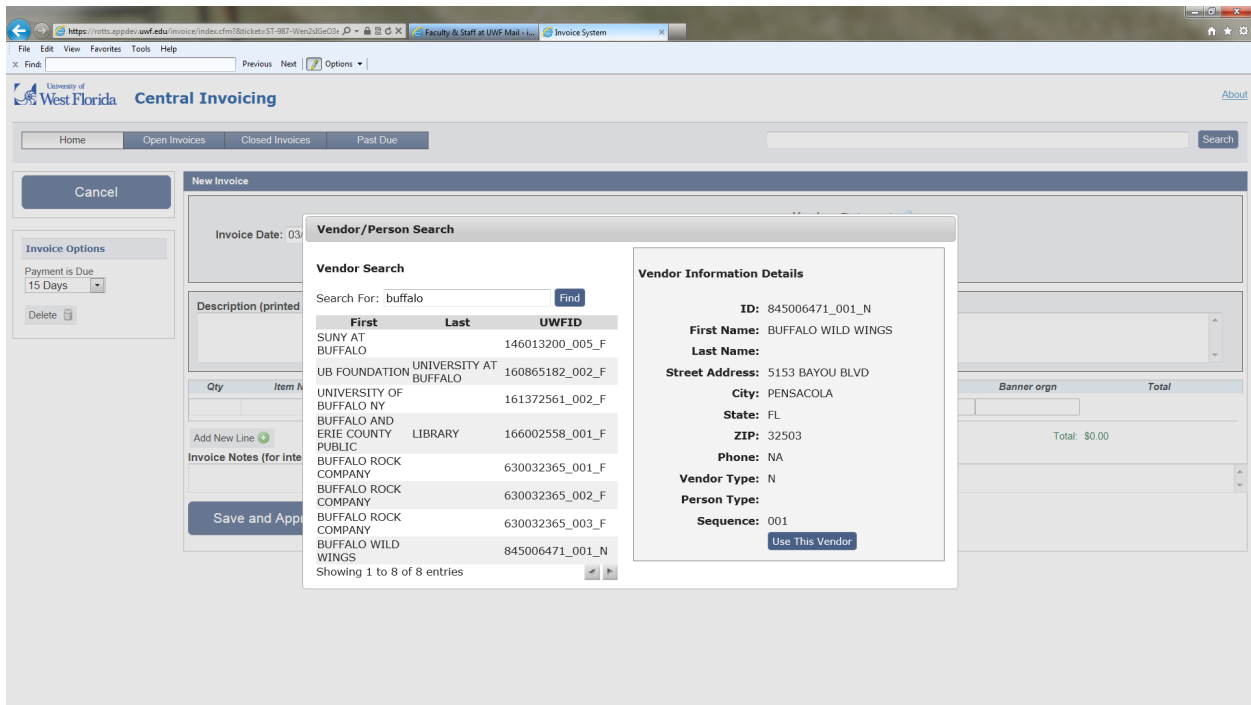
Create Invoice

Preferences

Working for department:
Invoicing Administrators ▼

User Name: Suzanne Claggett

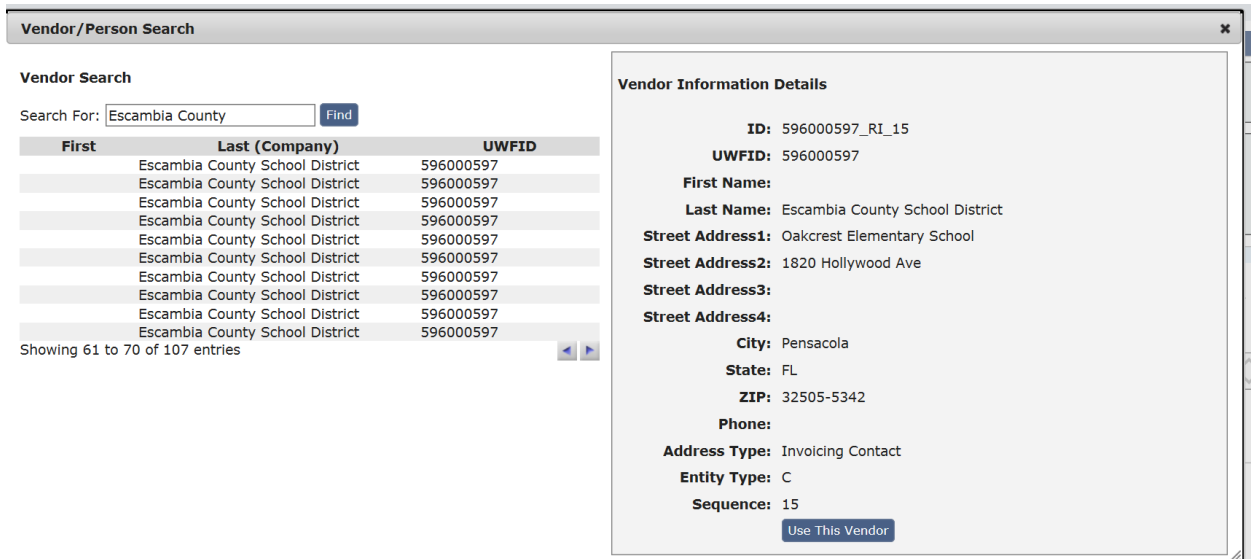**Current Role:** NA

Links

AR Vendor Registration

Creating a New Invoice

1. Select [Create Invoice] to add new invoice. A unique Invoice No. will be assigned.

2. Enter invoice date. You can select a due date by selecting the drop box under Invoice Options. A custom due date can be selected by choosing Other.

3. Select "Find Vendor" to search for vendor.

    Vendor names can be found by entering names, vendor numbers, or student IDs. You may include the wild card % to help with searches.
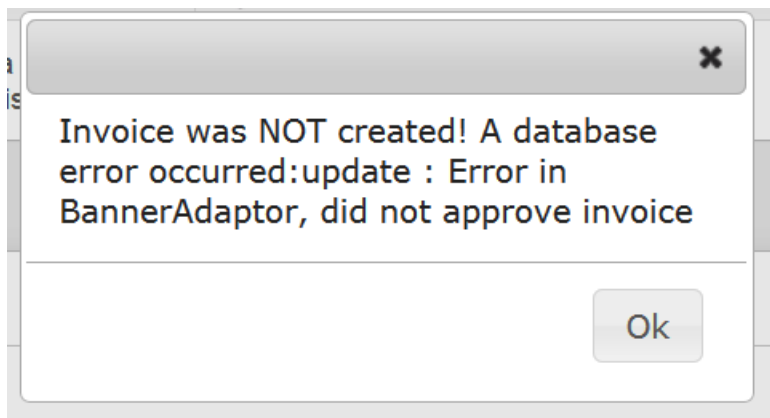
Many vendors in Banner have the same tax ID number and will have multiple vendor listings. For example, all of the Escambia County schools. Each of the school will be listed under Escambia County School District. You will need to click on the individual listings to find the school you are billing.
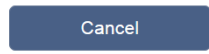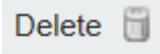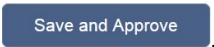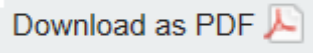
Select vendor name, confirm vendor information details are correct, and select
Use This Vendor .

4. Enter description. This is a required field.

5. Complete invoice information.   A detail code must be entered. You will not receive an error message for incorrect detail codes at the time the invoice is created. You will receive an error message when the invoice is approved.

6. Item No. is an optional field and is for internal use only. It will **not** be printed on the invoice.

7. Individual lines can be deleted be selecting the ✖ at the end of the line. Additional lines must be deleted before saving invoice.

8. New lines can be added by pressing tab at the end of the last line or selecting the   Add New Line ⊕   button.

9. Individual items can be corrected by selecting the item.

10. The invoice can be cancelled by selecting   Cancel   or   Delete 🗑 under the Invoice Options before it is Saved.

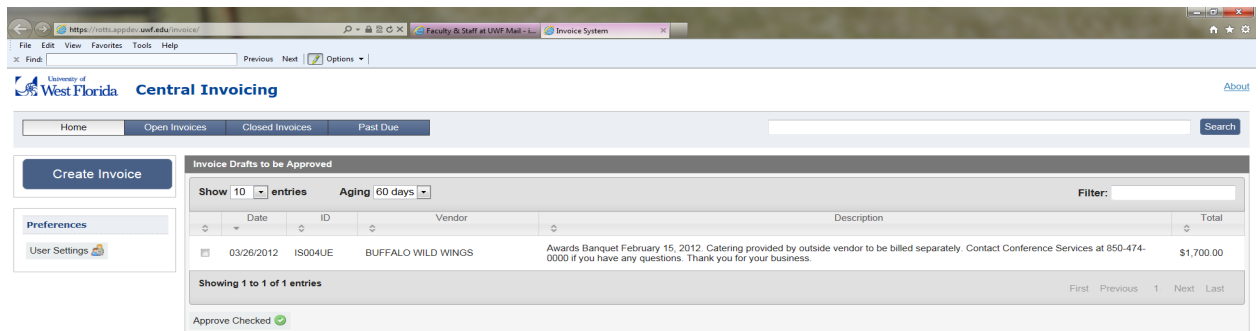11. Invoice notes is an optional field and is for internal use only.

12.   If the invoice is correct, select Save as Draft or Save and Approve .

13.   After approving, to create printable invoice, select Open Invoices tab, select invoice and select Download as PDF . To email the invoice, select Email a Copy . You must have the recipient's email address. The UWF Invoicing System is not interfaced with the UWF Gmail system.

Section Two:

Approving Invoice Drafts

1. Invoice Drafts to be Approved will be displayed on the Home tab.

2. To approve the invoice without reviewing, select the check box and select **Approve Checked** ✓.

3. To review the invoice, click on the invoice and the detail will display.

4. To make changes only, select items to change, make changes, and select **Update Invoice**.

5. To make changes and approve or approve only, select **Update and Approve**.

6. To return home without any changes, select **Cancel**.

7. After approving, to create printable invoice, select Open Invoices tab, select invoice and select **Download as PDF**. To email the invoice, select **Email a Copy**. You must have the recipients email address. The UWF Invoicing System is not interfaced with the UWF Gmail system.

Section Three: Miscellaneous

Voiding Invoices

Invoice system users do not have the ability to void invoices. In the event an invoice needs to be voided, use the shared Google Document Invoicing Voids and Adjustments.

Reviewing Outstanding Invoices

The Tableau report Invoicing Charges Details is designed for the Invoicing System users to look up charges created by the invoicing system.   The report lists the UWF ID, Detail Code, Invoice Number, Amount and Balance.

Instructions

On the Invoice Charges Details tab enter the following information:

Term – all charges are assigned a term based on the date they are entered. These dates coincide with the academic calendar for the term.

Detail Code – use the drop-down box and check the detail code that you use to create invoices. If you use multiple detail codes you may check more than one box. Once you have selected your detail code select "Apply" at the bottom of the drop-down box. This will create the report.

Contact information:

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