



Add Comments to a Sponsor Invoice

Use these instructions to add comments to a sponsor invoice. Comments can be added to a draft invoice before it is approved and released or after it is approved and released.

Prerequisites

- You must have the following responsibility to add comments to an unapproved sponsor invoice:
 - ORG OGM Billing Specialist
- An invoice must exist in the business application and be known.
- An award number associated with the draft invoice must be known.

To add comments to an unapproved sponsor invoice:

1. Navigate to **Billing > Invoice Review** to open the **Find Invoices** form.
2. Enter the award number.
3. Click **Find** to open the **Invoice Summary** form.

Find Invoices - ORG OGM-Billing Specialist @ TRAINX - 21-MAR-2019

Award

Operating Unit

Award Number

Award Name

Organization

Key Member

Name

Number

Role

Date Ranges

Creation -

Invoice -

GL -

Customer

Name

Number

Invoice

Status

AR Number

Draft Number

Amount -

4. Click the line of the unapproved invoice on which you need to add a comment to.
5. Click **Open** to open the **Invoice** form.

Invoice Summary (The Research Foundation for SUNY) - DRG OGM-Billing Specialist @ TR@NY - 21-MAR-2019

Invoice Review Grants

Award No	Draft Invoice	AR Invoice Num	Credit No	Customer	Bill Through	Invoice Date	Invoice Amount
70020	1	1507171		Stony Brook University	31-JAN-2015	22-APR-2015	16,798.27
70020	2	1507177		Stony Brook University	28-FEB-2015	22-APR-2015	23,146.91
70020	3	1507389		Stony Brook University	31-MAR-2015	23-APR-2015	27,037.62
70020	4	1512154		Stony Brook University	30-APR-2015	13-MAY-2015	18,105.60
70020	5	1518602		Stony Brook University	31-MAY-2015	08-JUN-2015	33,760.73
70020	6	1528045		Stony Brook University	30-JUN-2015	13-JUL-2015	24,664.26
70020	7	1535828		Stony Brook University	31-JUL-2015	12-AUG-2015	25,025.00
70020	8	1543966		Stony Brook University	31-AUG-2015	15-SEP-2015	22,081.29
70020	9	1553673		Stony Brook University	30-SEP-2015	22-OCT-2015	18,915.71
70020	10	1559417		Stony Brook University	31-OCT-2015	12-NOV-2015	31,993.68

Run Request... Print 1 Approve 1 Release... Credit...

Totals AR Invoice Lines Open

6. Select the **Comment** tab to open the **Comment** region on the **Invoice** form.

Invoice (The Research Foundation for SUNY) - 70020.1

Legal Entity: The Research Foundation for
 Award Number: 70020
 Customer Name: Stony Brook University
 Draft Number: 1
 Invoice Currency: USD
 Invoice Amount: 16,798.27
 Withheld Amount:
 Additional Grouping:

Receiver Legal Entity: The Research Foundation for SUN
 Award Name: SOCIALWELFARE BRISBANE SI
 Customer Number: 3429
 Bill Through Date: 31-JAN-2015
 Credit of:
 Invoice Class: Invoice
 Invoice Status: Accepted in Receivable
 AP Status:

Invoice Exception Invoice Warning []

Address Comment Approved,Interface Receivable Invoice Exception Award Details Rounding

Bill to Name: Stony Brook University Ship to Name: Stony Brook University
 Bill to Number: 3429 Ship to Number: 3429
 Billing Address: Conversion Address Shipping Address: Conversion Address
 Stony Brook, NY 11794, Stony Brook, NY 11794,
 Contact: Bill_To, Contact

AR Invoice Credit... Print Draft Run Request... Lines

7. Add a comment to the invoice by clicking in the text area.
8. Click **File > Save** to save your changes.
9. Click **File > Close Form** to return to the **Invoice Summary** form.

To add comments to an approved and released sponsor invoice:

1. Navigate to **Billing > Invoice Review** to open the **Find Invoices** form.
2. Enter the **Award** number.
3. Click **Find** to open the **Invoice Summary** form.
4. Click the line of the invoice on which you need to add a comment.
5. Click **Tools** in the tool bar at the top of the screen.

Award No	D	Reg	Change	Credit No	Customer	Bill Through	Invoice Date	Invoice Amount
70020	1	1518602	Change Comment		Stony Brook University	31-JAN-2015	22-APR-2015	16,798.27
70020	2		Split		Stony Brook University	28-FEB-2015	22-APR-2015	23,146.91
70020	3		Transfer 1		Stony Brook University	31-MAR-2015	23-APR-2015	27,037.62
70020	4	1512154	Draft Invoice Comment		Stony Brook University	30-APR-2015	13-MAY-2015	18,105.60
70020	5	1518602			Stony Brook University	31-MAY-2015	08-JUN-2015	33,760.73
70020	6	1528045			Stony Brook University	30-JUN-2015	13-JUL-2015	24,664.26
70020	7	1535828			Stony Brook University	31-JUL-2015	12-AUG-2015	25,025.00
70020	8	1543966			Stony Brook University	31-AUG-2015	15-SEP-2015	22,081.29
70020	9	1553673			Stony Brook University	30-SEP-2015	22-OCT-2015	18,915.71
70020	10	1559417			Stony Brook University	31-OCT-2015	12-NOV-2015	31,993.68

6. Select the **Draft Invoice Comment** to open the **Comment** region.
7. Add a comment to the invoice by clicking in the text area.
8. Click **File > Save** to save your changes.
9. Click **File > Close Form** to return to the **Invoice Summary** form.

