

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.

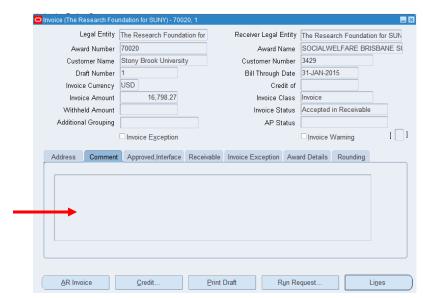
Find Invoices - OR	G OGM-Billing Specialist @ TRAINX ·	- 21-MAR-2019		
Award				
Operating Unit	The Research Foundation for SU			
Award Number	70020	Award Name		
		Organization		
Key Member		Date Ranges		
Name		Creation		
Number		Invoice		
Role		GL		
Customer		Invoice		
Name		Status		
Number		AR Number		
		Draft Number		
		Amount	· · ·	
			<u>C</u> lear F	ind)

- 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.

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

Award Nu E	Draft Invoice	AR Invoice Num	Credit No	Customer		Bill Throu	gh	Invoice Date	Invoice Amount
70020 1	1	1507171		Stony Brook Un	iversity	31-JAN-2	015	22-APR-2015	16,798
70020 2	2	1507177		Stony Brook Un	iversity	28-FEB-2	015	22-APR-2015	23,146
70020 3	3	1507389		Stony Brook Un	iversity	31-MAR-	2015	23-APR-2015	27,037
70020 4	1	1512154		Stony Brook Un	iversity	30-APR-2	2015	13-MAY-2015	18,105
70020 5	5	1518602		Stony Brook Un	iversity	31-MAY-	2015	08-JUN-2015	33,760
70020 6	6	1528045		Stony Brook Un	iversity	30-JUN-2	015	13-JUL-2015	24,664
70020 7	7	1535828		Stony Brook Un	iversity	31-JUL-2	015	12-AUG-2015	25,025
70020 8	3	1543966		Stony Brook Un	iversity	31-AUG-2	2015	15-SEP-2015	22,081
70020 9)	1553673		Stony Brook Un	iversity	30-SEP-2	2015	22-OCT-2015	18,915
70020 1	10	1559417		Stony Brook Un	iversity	31-OCT-2	2015	12-NOV-2015	31,993
		Totals		AR Invoice	Lines		<u>O</u> pen		
voice (The F	Research	Foundation for	SUNY) - 7	020 1					-
	10000010111			0020, 1					_
	Legal Ent		arch Foun	dation for	Receiver Leo	gal Entity	The Res	search Found	lation for SUN
		ity The Rese		dation for		gal Entity rd Name			
Aw	Legal Ent rard Numb	ity The Rese er 70020	arch Foun		Awa	rd Name	SOCIAL		lation for SUN
Aw Cust	Legal Ent rard Numb comer Nan	ity The Rese er 70020 ne Stony Bro			Awa Customer	rd Name Number	SOCIAL 3429	WELFARE I	lation for SUN
Aw Cust D	Legal Ent rard Numb comer Nan rraft Numb	ity The Rese er 70020 ne Stony Bro er 1	arch Foun		Awa Customer Bill Throu	rd Name Number Igh Date	SOCIAL	WELFARE I	lation for SUN
Aw Cust D Invoid	Legal Ent rard Numb comer Nan raft Numb ce Curren	ity The Rese er 70020 ne Stony Bro er 1 cy USD	arch Foun ook Univer		Awa Customer Bill Throu	rd Name Number ugh Date Credit of	SOCIAL 3429 31-JAN-	WELFARE I	lation for SUN
Aw Cust D Invoid Invo	Legal Ent rard Numb romer Nan raft Numb ce Curren rice Amou	ity The Rese er 70020 ne Stony Bro er 1 cy USD int	arch Foun		Awa Customer Bill Throu Invoir	rd Name Number ugh Date Credit of ce Class	SOCIAL 3429 31-JAN- Invoice	2015	lation for SUN BRISBANE SI
Aw Cust D Invoid Invoid Withh	Legal Ent rard Numb romer Nam raft Numb ce Curren rice Amou rice Amou	ity The Rese er 70020 ne Stony Bro er 1 cy USD nt	arch Foun ook Univer		Awa Customer Bill Throu Invoic	rd Name Number ugh Date Credit of ce Class e Status	SOCIAL 3429 31-JAN- Invoice	WELFARE I	lation for SUN BRISBANE SI
Aw Cust D Invoid Invoid Withh	Legal Ent rard Numb romer Nan raft Numb ce Curren rice Amou	ity The Rese er 70020 ne Stony Bro er 1 cy USD nt	arch Foun ook Univer		Awa Customer Bill Throu Invoic	rd Name Number ugh Date Credit of ce Class	SOCIAL 3429 31-JAN- Invoice	2015	dation for SUN BRISBANE SI
Aw Cust D Invoid Invoid Withh	Legal Ent rard Numb romer Nam raft Numb ce Curren rice Amou rice Amou	ty The Rese r 70020 ne Stony Bro er 1 cy USD nnt	arch Foun ook Univer	sity	Awa Customer Bill Throu Invoic	rd Name Number ugh Date Credit of ce Class e Status	SOCIAL 3429 31-JAN- Invoice Accepte	2015	dation for SUN BRISBANE SI
Aw Cust D Invoid Invoid Withh	Legal Ent rard Numb romer Nam raft Numb ce Curren rice Amou rice Amou	ity The Rese er 70020 ne Stony Bro 1 cy USD nnt nnt Invoice	arch Foun ook Univer 16,798.27	sity	Awa Customer Bill Throu Invoic Al	rd Name Number ugh Date Credit of ce Class e Status ⊃ Status	SOCIAL 3429 31-JAN- Invoice Accepte	WELFARE I	dation for SUN BRISBANE SI
Aw Cust D Invoid Invo Withh Addition	Legal Ent ard Numb omer Nan raft Numb ce Curren ice Arnou nal Groupi Comm	ity The Rese er 70020 ne Stony Bro 1 cy USD nnt nnt Invoice	arch Foun ook Univer 16,798.27 Exception ed,Interfac	sity	Awa Customer Bill Throu Invoic Al	rd Name Number ugh Date Credit of ce Class e Status ⊃ Status ion Awa	SOCIAL 3429 31-JAN- Invoice Accepte	WELFARE I 2015 ed in Receiva e Warning s Roundin	dation for SUN BRISBANE SI
Aw Cust D Invoid Invoid Invoid Invoid Nithh Addition Address Bill to Na	Legal Ent rard Numb comer Nan raft Numb ce Curren nice Arnou neld Arnou nal Groupi comm comm	ity The Rese er 70020 ne Stony Bro er 1 cy USD nt Int Invoice y Brook Unive	arch Foun ook Univer 16,798.27 Exception ed,Interfac	sity	Awa Customer Bill Throu Invoic Al	rd Name Number Jgh Date Credit of ce Class e Status D Status ion Awa Stony B	SOCIAL 3429 31-JAN- Invoice Accepte	WELFARE I 2015 ed in Receiva e Warning s Roundin	dation for SUN BRISBANE SI
Aw Cust D Invoic Invo Withh Addition Address Bill to Nam Bill to Nam Bill	Legal Ent rard Numb omer Nan raft Numb ce Curren- nice Amou leld Amou leld Amou leld Amou nal Groupi comm me Ston ber 3429 ing Conv	ity The Rese er 70020 ne Stony Bro er 1 cy USD nt Int Invoice y Brook Unive	arch Foun pok Univer 16,798.27 Exception ed,Interfac rsity	sity	Awa Customer Bill Throu Invoic Invoic Al Invoice Except Ship to Name Ship to Number	rd Name Number Igh Date Credit of ce Class e Status D Status ion Awa Stony B 3429	SOCIAL 3429 31-JAN- Invoice Accepte	WELFARE I 2015 ed in Receiva e Warning s Roundin versity	dation for SUN BRISBANE SI
Aw Cust D Invoid Invoid Invoid Invoid Nithh Addition Address Bill to Nam Bill to Nam	Legal Ent rard Numb omer Nan raft Numb ce Curren- nice Amou leld Amou leld Amou leld Amou nal Groupi comm me Ston ber 3429 ing Conv	ity The Rese er 70020 ne Stony Bro er 1 cy USD nt int Invoice ient Approve y Brook Unive	arch Foun pok Univer 16,798.27 Exception ed,Interfac rsity	sity	Awa Customer Bill Throu Invoic Al Ship to Name	rd Name Number Igh Date Credit of ce Class e Status D Status ion Awa Stony B 3429	SOCIAL 3429 31-JAN- Invoice Accepte Invoice Invoice Accepte	WELFARE I 2015 ed in Receiva e Warning s Roundin versity	dation for SUN BRISBANE SI
Aw Cust D Invoic Invo Withh Addition Address Bill to Nam Bill to Nam Bill	Legal Ent rard Numb omer Nan raft Numb ce Curren- nice Amou leld Amou leld Amou leld Amou nal Groupi comm me Ston ber 3429 ing Conv	ity The Rese er 70020 ne Stony Bro er 1 cy USD nt int Invoice ient Approve y Brook Unive	arch Foun pok Univer 16,798.27 Exception ed,Interfac rsity	sity	Awa Customer Bill Throu Invoic Al Novice Except Ship to Name Ship to Number Shipping	rd Name Number Igh Date Credit of ce Class e Status D Status ion Awa Stony B 3429	SOCIAL 3429 31-JAN- Invoice Accepte Invoice Invoice Accepte	WELFARE I 2015 ed in Receiva e Warning s Roundin versity	dation for SUN BRISBANE SI
Aw Cust D Invoic Invo Withh Addition Address Bill to Nam Bill to Nam	Legal Ent rard Numb omer Nam raft Numb ce Curren ice Amou al Groupi comm me Ston ber 3429 iing Conv ess	ity The Rese er 70020 ne Stony Bro er 1 cy USD nt int Invoice ient Approve y Brook Unive	arch Foun bok Univer 16,798.27 Exception ed,Interfac rsity	sity	Awa Customer Bill Throu Invoic Al Novice Except Ship to Name Ship to Number Shipping	rd Name Number ugh Date Credit of ce Class e Status D Status ion Awa Stony B 3429 Convers	SOCIAL 3429 31-JAN- Invoice Accepte Invoice Invoice Accepte	WELFARE I 2015 ed in Receiva e Warning s Roundin versity	dation for SUN BRISBANE SI
Aw Cust D Invoic Invoi Withh Addition Bill to Na Bill to Na Bill to Na Bill to Na	Legal Ent rard Numb omer Nam raft Numb ce Currenc ice Amou al Groupi nal Groupi me Ston ber 3429 jing Conv sss	ity The Rese er 70020 ne Stony Bro er 1 cy USD int Invoice ient Approve y Brook Unive	arch Foun bok Univer 16,798.27 Exception ed,Interfac rsity	sity	Awa Customer Bill Throu Invoic Al Novice Except Ship to Name Ship to Number Shipping	rd Name Number ugh Date Credit of ce Class e Status D Status ion Awa Stony B 3429 Convers	SOCIAL 3429 31-JAN- Invoice Accepte Invoice Invoice	WELFARE I 2015 ed in Receiva e Warning s Roundin versity	dation for SUN BRISBANE SI

- 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.

🕲 í 🍳			1	i 🥖 🌍 🥥 !	🎭 i 🤶 💡			
voices - ORG O Non-Billable 1		(-21-MAR-2019						
	Billing H		01000.05					
voice Sum			SUNY)- OF	RG OGM-Billing Speci	alist@TRAINX-21	-MAR-2019		
Invoice	Rev Belease							
		ate Revenue 1						
Award N		ate Cost/Revenue * Comment	Credit No	Customer		Bill Through	Invoice Date	Invoice Amount
70020	1 Split	Comment		Stony Brook Unive	ersity	31-JAN-2015	22-APR-2015	16,798.2
70020	2 Transfer	1		Stony Brook Unive	ersity	28-FEB-2015	22-APR-2015	23,146.9
70020		bice Comment		Stony Brook Unive	ersity	31-MAR-2015	23-APR-2015	27,037.6
70020	4	1512154	[Stony Brook Unive	ersity	30-APR-2015	13-MAY-2015	18,105.6
70020	5	1518602 ┥		Stony Brook Unive	ersity	31-MAY-2015	08-JUN-2015	33,760.7
70020	6	1528045		Stony Brook Unive	ersity	30-JUN-2015	13-JUL-2015	24,664.2
70020	7	1535828		Stony Brook Unive	ersity	31-JUL-2015	12-AUG-2015	25,025.0
70020	8	1543966		Stony Brook Unive	ersity	31-AUG-2015	15-SEP-2015	22,081.2
70020	9	1553673		Stony Brook Unive	ersity	30-SEP-2015	22-OCT-2015	18,915.7
70020	10	1559417		Stony Brook University		31-OCT-2015	12-NOV-2015	31,993.6
(•								
Run Re	quest	Print 1		Approve 1	Release	Cre <u>d</u> it.)	
				AR Invoice	(

- 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.

RF: Draft Invoices Comments		
RF Invoice Comments for Draft # :	1	
4		