



## Adjust an Invoice - Process Help

Use these instructions to adjust the amount due on an Accounts Receivable (AR) invoice. Adjustments are frequently made when the invoice amount in AR differs from the amount being invoiced to the sponsor.

### Prerequisites

- You must have the following responsibility to adjust an invoice:
  - ORG AR Billing Specialist
- To facilitate adjusting an invoice, be sure the following information is already entered in the system:
  - The original invoice.
  - The award associated with the invoice.

### To adjust an invoice:

1. From the **Collections** menu, select **Account Details** to open the **Find Account Details** form.
2. Enter the Award Number, Status, Award Invoice Number or Bill to Customer Name.
3. Click **Find** to go to the **Account Details** window.

Find Account Details (The Research Foundation for SUNY) - ORG AR-Billing Specialist @ TRAINX - 0

Award Number	70007	Sequence	
AR Invoice Number		Class	
Source			
Due Date			
Days Late			
Currency		Status	Open
Sales Order			

Bill To Customer

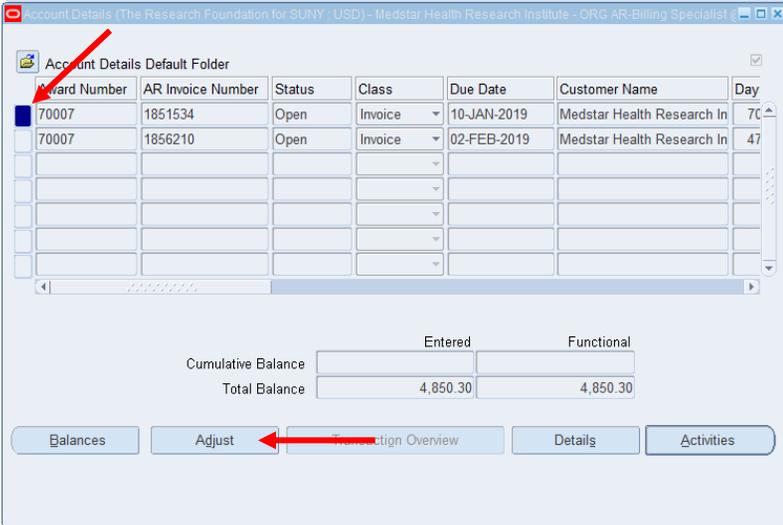
Name		Number	
Location			

Amounts

Original			
Balance Due			

Clear Find

- Select the box to the left of the invoice that you need to adjust.
- Click **Adjust** to go to the **Adjustments** window.



- Click in the **Activity Name** field to populate Invoice Adjustment.
- Choose the **Type** from the List of Values.
- Enter the **Amount** of the adjustment.
- Select **File > Save and Proceed**.

