

Create an Advance Invoice

Use these instructions to create an invoice for advance payment from a sponsor.

Prerequisites

- You must have the following responsibility to create an advance invoice:
 - o ORG AR Billing Specialist
- The award must exist in the business application.
- The award number must be known.

To create an advance invoice:

1. Navigate to **Transactions > Transactions** to open the **Transactions** form.



- 2. Click in the **Transaction** field to display the **Invoice Transaction Flexfield**.
- 3. In the Source field, select Advances.
- 4. Enter the Award Number.



- 5. Click **OK** to go back to the **Transactions** form.
- 6. In the **Source** field, Select **Advances**.
- 7. Press **Tab**. The **Class**, **Type**, and **GL Date** fields will automatically populate.
- 8. Click in the **Ship To Name** field and select the sponsor name from the list of values.
- 9. Press the **Enter** key to automatically fill in the address and other fields in both the **Ship To** and **Bill To** regions of the window.
- 10. Click **File > Save** to save your changes.
- 11. Click Line Items to open the Lines form.

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Source Advances				Date 15-APR-2019				Line						
Numbe	r [GL Date 15-APR-2019				Tax					
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	Type				Do	cument Num				Charges				
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Location	78655	78655				78653								
Address	Amory	Building			Amory Building			Paying Customer						
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- 12. In the Description field, select **Advance Memo Line** from the list of values.
- 13. Enter the **unit of measure** of the invoiced amount. For example, Dollar, in the **UOM** field.
- 14. Always enter 1 in the Quantity field.
- 15. In the **Unit Price** field, enter the **amount** of the advance invoice.
- 16. Press the **Tab** key to automatically fill in the total **Amount.**
- 17. Select File > Save to save your changes.

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	1			Advance Me	emo Line		Dollar		1	1	15	15.00			^

18. Select File > Close to go back to the Transactions form.

Note: The Number field is a systemgenerated advance invoice number. You may want to write it down for future reference.

19. Click Complete.

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- Transaction									- Balan	ce Due			
Source Advances						Date		Line					
Number 55666						GL Date		Тах					
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