

Create Invoice Template

Create Invoice Template

1. Click the **+CREATE** button in the upper right corner of the Invoices swim lane.



2. The invoice page is displayed

The screenshot shows the invoice creation form with the following fields and values:

- Vendor Name: [Empty]
- Vendor Address: [Greyed out]
- Vendor Invoice Number: [Empty]
- Invoice Date: [12/17/2019]
- Invoice Amount: [0.00] USD
- Invoice ID: QA00-1057-0212
- Contract Number: [Empty]

3. Complete each of the appropriate fields in the invoice header section. The populated fields and values will be pulled into any invoices created from this template.

The screenshot shows the invoice header section for vendor X10585096-Cornejo & Sons Llc. The fields and values are:

- Vendor Name: X10585096-Cornejo & Sons Llc
- Vendor Address: X10585096-Cornejo & Sons Llc Cornejo Ma...
X10585096-Cornejo & Sons Llc
Cornejo Materials PO Box 16940
Wichita, KS 67216-0940
USA
ID: X10585096BU12
- Vendor Invoice Number: 399464
- Invoice Date: 12/17/2019
- Invoice Amount: 3,166.89 USD
- Invoice ID: QA00-1060-9105
- Contract Number: [Empty]

- **Vendor Name:** Fully searchable by the vendor number, or any part of the vendor name.
- **Vendor Address:** Auto populates if there is only one address listed, otherwise fully searchable.
- **Vendor Invoice Number (optional):** List as it appears on the vendor invoice, up to 36 characters.
- **Invoice Date:** Date listed on the vendor's invoice.
- **Invoice Amount:** Total amount to be paid.
- **Invoice ID:** System Generated.
- **Contract Number (optional):** State or WSU issued number if applicable.

Invoice Detail

4. Enter **Payment Message** (optional - 70 characters) with identifying information for the invoice such as:
- Account Number
 - Customer Number
 - Order Number
 - Brief description (Maintenance Subscription 10/23/19-10/22/20)

Payment Message

Customer No: 102104, Order No: IP200652

5. Enter a **Department Approval / Routing** name when additional staff are required to review the invoice. This field is optional.

Department Approval / Routing (optional)

Department Approval / Routing (optional)

Kristie

Kristie Bixby

Kristie Courtney

6. Enter a detailed **Business Purpose**.

Business Purpose

Salt and sand used to maintain the university sidewalks.

- A business purpose is defined as one that supports or advances the goals, objectives and mission of the university; and adequately describes the expense as a necessary, reasonable and appropriate business expense for the university.
- The field appears small but has a high character limit (>220)

7. **Activity** and/or **Location**: If your department utilizes these fields, select the proper value, otherwise leave blank.

Activity	-- Select -- ▼
Location	-- Select -- ▼

- **Activity**: Click the drop-down box and select the appropriate value from the list.
- **Location**: Click the drop-down box and select the appropriate value from the list.

8. The **Department Tracking Number** field is an optional field a department can utilize.

Department Tracking Number

Special Handling, Comments and Attachments

9. Items entered in the **Special Handling, Comments or Attachments** section will not populate on an invoice created from a template. Leave the default values in these fields.

Special Handling	
Payment Handling No ▼ <input type="text"/>	Handling Options (AP use only) <input type="checkbox"/> Suspended <input type="checkbox"/> WIRE - International (include \$25 fee) <input type="checkbox"/> WIRE - Domestic <input type="checkbox"/> Interfund Additional Information <input type="text"/>
Comments (0) <input type="text"/> Add Comment <input type="button" value="Post"/>	
Attachments (0)	

Add Expense

10. Click on the + **Add Expense** button.

11. Select an expense tile.

12. Enter/verify the total amount of the invoice allocated to this funding/account code selection.

13. **Funding:** Search for and select the appropriate funding.

14. **--Select--** Tap anywhere in this field to search for and select the appropriate account code. Save the expense line.

Convert To Template

15. Click the three dots icon (...) in the upper left corner. Select **Convert to Template**.

16. The following warning message will display - click **OK** to continue.

17. The following message will display.

18. This will convert the invoice to an invoice template.

Please note: the information previously entered on this page is no longer an active invoice once converted to a template. No payment will be generated! See the **Create Invoice from Template** quick reference guide for detailed instructions.