



**Office of the Controller
Miscellaneous Accounts Receivable
Creating an Invoice**

A customer can be invoiced once activated. To create an invoice in PeopleSoft finance, use the navigation:

Main Menu > Billing > Maintain Bills > Express Billing

Step 1: Click **Add a New Value** button.

A screenshot of the PeopleSoft finance application interface. The breadcrumb navigation at the top reads "Main Menu > Billing > Maintain Bills > Express Billing". The page title is "Express Bill Entry". Below the title, there is a section "Find an Existing Value" with a red-bordered button labeled "Add a New Value". Underneath, there are "Search Criteria" instructions and two search filters: "Recent Searches" and "Saved Searches". The main form area contains several search fields: "Business Unit" (set to SCAIK), "Invoice" (set to begins with AK0000980), "Bill Status", "Customer" (set to begins with), "Contract" (set to begins with), "Bills in Business Unit", and "Template Invoice Flag". A "Show fewer options" link is at the bottom of the form.

Step 2: From the next screen, click the **Add** button.

Note: Business Unit should correlate to your Campus.

The screenshot shows the 'Express Bill Entry' page. At the top, there is a navigation bar with 'Billing' selected. Below the navigation bar, the page title is 'Express Bill Entry'. There is a section titled 'Add a New Value' with a search button 'Find an Existing Value'. The form contains several input fields: '*Business Unit' with the value 'SCAIK', '*Invoice' with the value 'NEXT', 'Bill Type Identifier', 'Bill Source', 'Customer', and 'Invoice Date'. A red box highlights the 'Add' button at the bottom left of the form.

Step 3: On the Billing General page, enter the Invoice Date in the **Invoice Date** field. The invoice date is the current date.

Step 4: Click the **Customer Lookup** button and select the appropriate Customer.

The screenshot shows the 'Billing General' page. At the top, there is a navigation bar with 'Billing' selected. Below the navigation bar, the page title is 'Billing General'. The form contains several input fields: 'Unit' with the value 'SCAIK', 'Invoice' with the value 'NEXT', 'Pretax Amt' with the value '0.000', 'Bill Status' with the value 'NEW', '*Bill Type' with the value 'AIK', 'Cycle ID' with the value 'MISC_AR', '*Invoice Date' with the value '11/06/2025', and '*Frequency' with the value 'Once'. A red box highlights the '*Invoice Date' field. Below these fields, there is a section titled 'Customer Information' with a 'Customer' field and a 'View Customer Activity' button. A red box highlights the 'Customer' field.

Step 5: Enter the customer ID in the **Customer** field.

Step 6: Click the **Search** button.

Step 7: Click the **Customer** hyperlink to populate the Customer field on the Billing General page.

Look Up Customer

SetID MSCAR

Customer begins with CST0000043

Name 1 begins with

Search Clear Cancel Basic Lookup

Search Results

View 100 | 1-1 of 1

Customer	Name 1	InterUnit
CST0000043	Aiken Regional Medical Centers	N

Step 8: In the Customer Information section, click the **expand** arrow next to Address to verify the contact was added successfully. There should be a 1 in the *Attention To box and in the *Location box.

Note: If either box is empty, the contact was not added successfully.

Customer Information

*Customer CST0000043 View Customer Activity

Aiken Regional Medical Centers

Address

*Attention To 7

*Location 1

Language Code ENG

Contact Name Thomas Kelly

Number of Copies 1

*Invoice Media Email

Email Address thomas.kelly@uhsinc.com

Country USA United States

Address 1 302 University Pkwy

Address 2

Address 3

City Aiken

County South Carolina

Postal 29801

State SC

Step 9: Click the **Invoice Media** drop-down arrow and make the appropriate selection.

- Select **Email** if you would like the system to email the invoice to the Customer.
- Select **Print** if you would like to print/save the invoice and email the invoice to the customer to include additional attachments.

Customer Information

*Customer: CST0000043

Address: Aiken Regional Medical Centers

*Attention To: 7

*Location: 1

Language Code: ENG

Email Address: thomas.kelly@uhsinc.com

Country: USA United States

Address 1: 302 University Pkwy

Address 2:

Address 3:

City: Aiken

County:

Postal: 29801

State: SC South Carolina

Contact Name: Thomas Kelly

Number of Copies: 1

*Invoice Media: Email (selected)

Options: Email, Print

Step 10: Click the **Payment Information** expand arrow to update the Payment Terms.

Step 11: If you need to select a different Pay Terms option, click the **Pay Terms Lookup** button.

Payment Information

*Pay Terms: NET15

Remit To: SCDEP

Paid Reference:

Paid Amount: 0.00

Letter of Credit ID:

Pay Method: Check

Bank Account: AIK

Fwd Balance: 0.00

Letter of Credit Document ID:

Step 12: Click the **Payment Terms ID** applicable for this invoice.

Look Up Pay Terms

*SetID: MSCAR

Payment Terms ID begins with:

Search: Clear: Cancel: Basic Lookup

Search Results

View 100 | 1-3 of 3

Payment Terms ID	Description
IMMED	Due Immediately
NET15	Due in 15 Days
NET30	Due in 30 Days

Payment Information

*Pay Terms: NET15

Remit To: SCDEP

Paid Reference:

Paid Amount: 0.00

Letter of Credit ID:

Header Detail

*Accounting Date: 11/06/2025

*From Date: 11/06/2025

Sales Person: MSCAR01

Credit Analyst: MSCAR_CA

*Billing Specialist:

System Source:

Step 13: In the **Header Detail** section, click the **Billing Specialist Lookup** button to select the Billing Specialist.

The screenshot shows the 'Header Detail' section of the billing system. Fields include:

- *Accounting Date: 11/09/2025
- *From Date: 11/09/2025
- *To Date: 11/09/2025
- Sales Person: MISCAR01
- Credit Analyst: MISCAR_CA
- *Billing Specialist: [Empty field with a magnifying glass icon]
- Collector: MISC_AR
- System Source: [Empty field]

Step 14: The Billing Specialist is linked to the Remit Address on the invoice. Carefully select your campus/department Billing Specialist.

Note: For the **Columbia campus**, please use the Look Up option and search by department number to ensure the correct Billing Specialist is selected.

The screenshot shows the 'Look Up Billing Specialist' dialog box. The 'Billing Specialist' field is set to 'begins with' and the search results show 'AK_BILL' for 'Business Services'. The 'Search' button is highlighted with a red box.

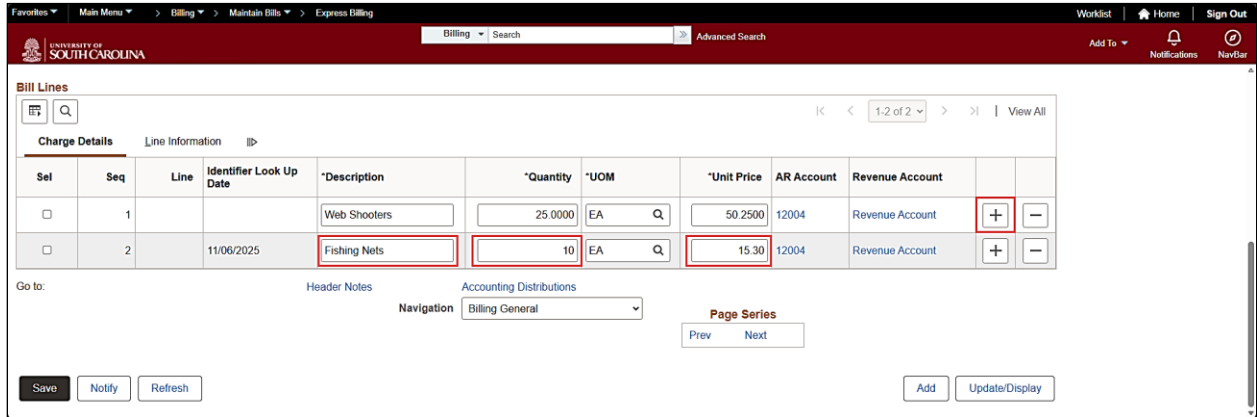
Step 15: In the **Bill Lines** section, enter the *required fields:

- Description,
- Quantity,
- Unit price.

The screenshot shows the 'Bill Lines' section of the billing system. The 'Description', 'Quantity', and 'Unit Price' fields are highlighted with red boxes. The table below shows the data for the first bill line:

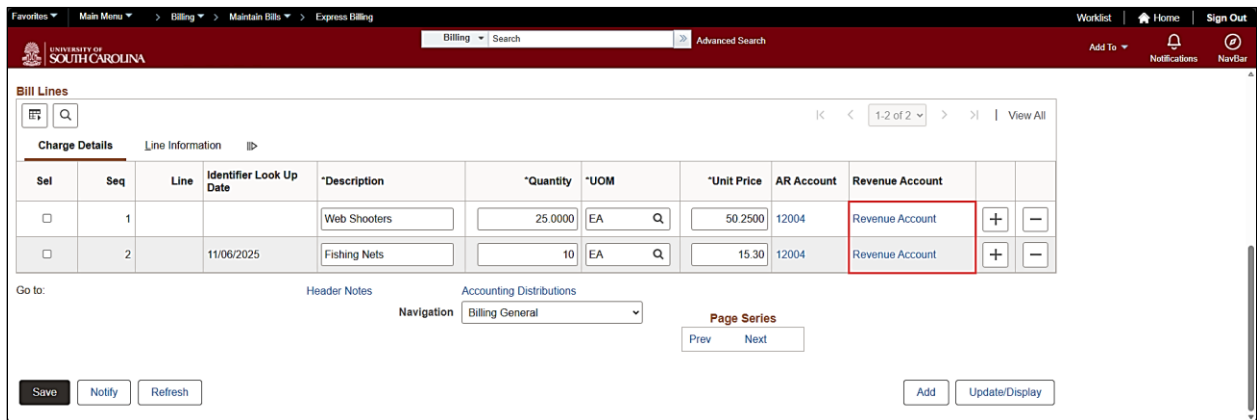
Sel	Seq	Line	*Description	*Quantity	*UOM	*Unit Price	Gross Extended	AR Account	Revenue Account
<input type="checkbox"/>	1		Web Shooters	25	EA	50.25	0.00	12004	Revenue Account

Step 16: Click the **Plus** button to add additional lines for billed items.

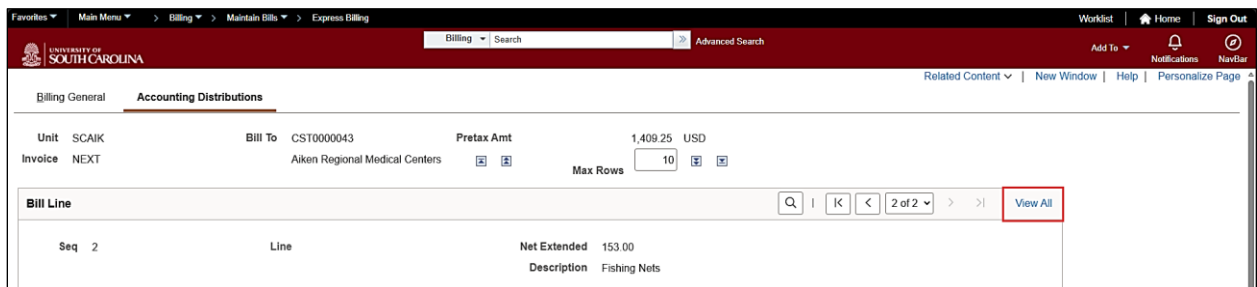


Step 17: To add your chartfield information, click the **Revenue Account** link.

Note: Different chartfields can be added for each line when applicable.



Step 18: Before entering the chartfield information for each billed item, click the **View All** link so that you can enter the chartfield information for each one if there are multiple.



Step 19: Enter the **Chartfield** string for each billed item.

Note: Be sure you are associating the correct chartfield to the correct item if using different accounts.

Bill Line 1

Seq 1 Line Net Extended 1,256.25
Description Web Shooters

Revenue Distribution

BI Creates GL Accl Entries

Revenue

Acctg Information Reference Information

	Oper Unit	Dept	Fund	Account	Class	PC Business Unit	Project
	AK000	911164	E2084	40400	301		

Percent 0.00 Amount 0.00 Gross Extended 1,256.25

Step 20: If applicable, scroll down to add the chartfield information for the second billed item.

Bill Line 2

Seq 2 Line Net Extended 153.00
Description Fishing Nets

Revenue Distribution

BI Creates GL Accl Entries

Revenue

Acctg Information Reference Information

	Oper Unit	Dept	Fund	Account	Class	PC Business Unit	Project
	AK000	911164	E2084	40400	301		

Percent 0.00 Amount 0.00 Gross Extended 153.00

Go to: Tax Accounting Distributions Discount/Surcharge Notes

Navigation Accounting - Distributions

Page Series Prev Next

Header Notes and **Line Notes** can be added to an invoice for a variety of reasons. A Header Note should be added to elaborate on billing details, to note special payment agreements, etc. Line Notes can be added to indicate something particular about a billed item or service.

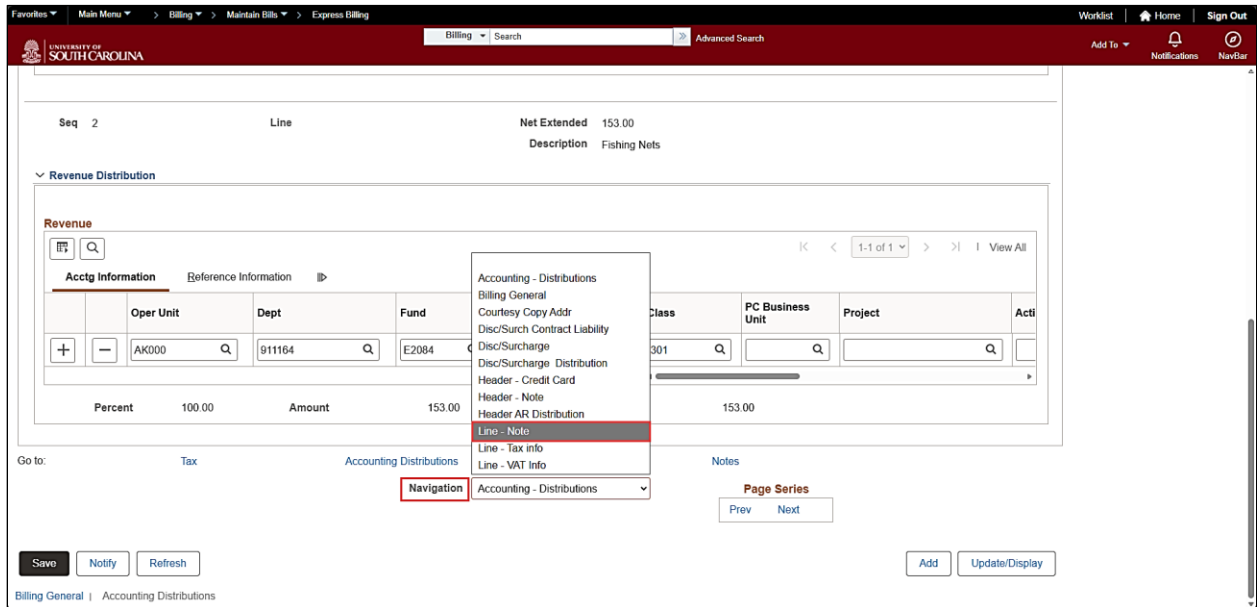
Step 21: To add a **Header Note**, click the **Navigation** drop-down arrow and select **Header – Note** from the list.

The screenshot shows the 'Accounting Distributions' section of the billing system. A dropdown menu is open, listing various distribution types. The 'Header - Note' option is highlighted in red. The background shows a table with columns for Oper Unit, Dept, Fund, Class, PC Business Unit, and Project. The 'Fund' column contains 'E2084' and the 'Amount' is '153.00'. The 'Navigation' button is also highlighted in red.

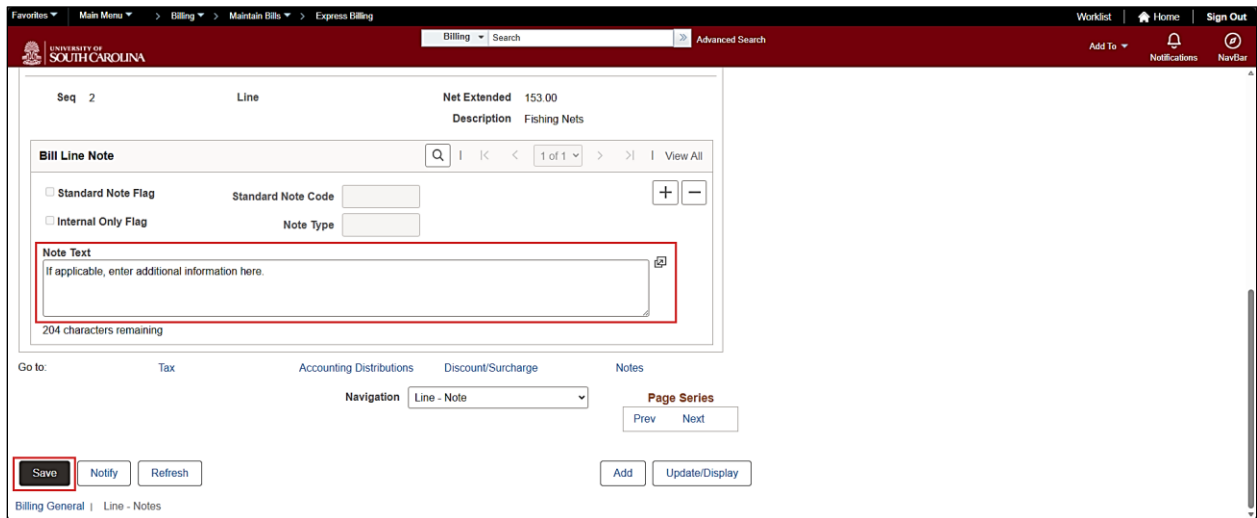
Step 22: Enter a **Bill Header Note** in the **Note Text** box and click the **Save** button.

The screenshot shows the 'Header - Notes' page. The 'Note Text' box is highlighted in red. The page displays 'Unit: SCAIK', 'Bill To: CST0000043', and 'Pretax Amt: 1,409.25 USD'. The 'Note Text' box contains the text: 'If applicable, enter additional information here.' and shows '204 characters remaining'. The 'Save' button is highlighted in red.

Step 23: To add a **Bill Line Note**, click the **Navigation** drop-down arrow and select **Line-Note** from the list.

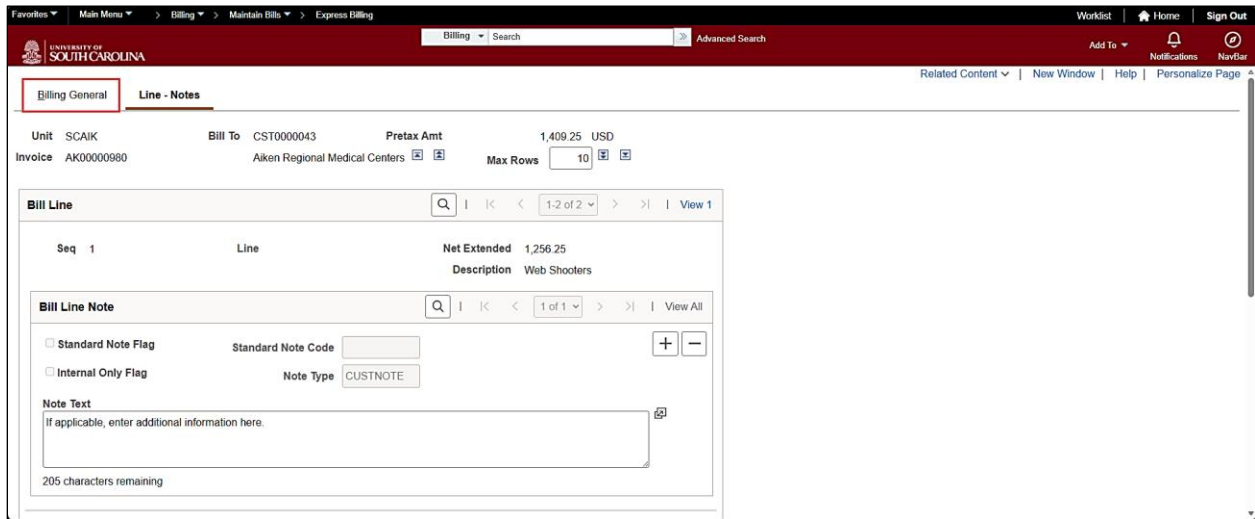


Step 24: Enter a **Bill Line Note** in the **Note Text** box and click the **Save** button.

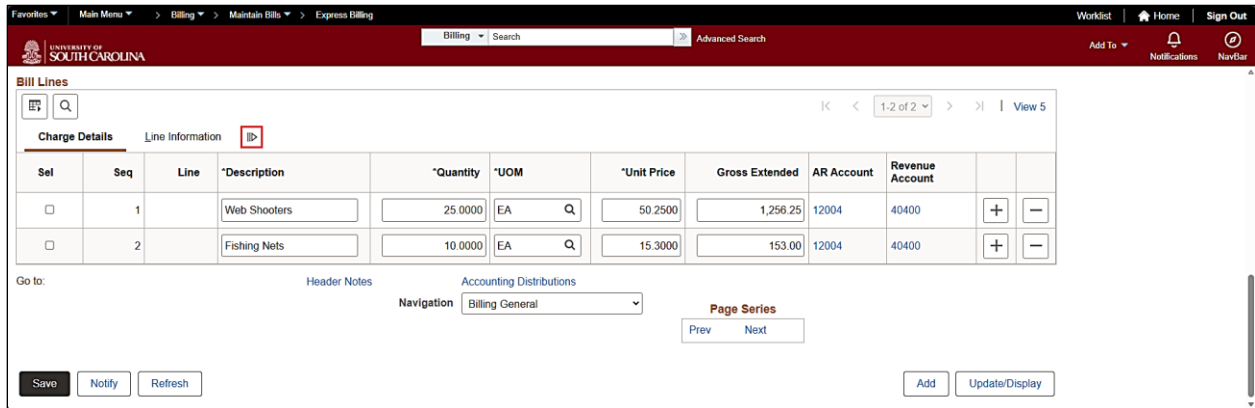


Sales tax should be added for all taxable goods and services.

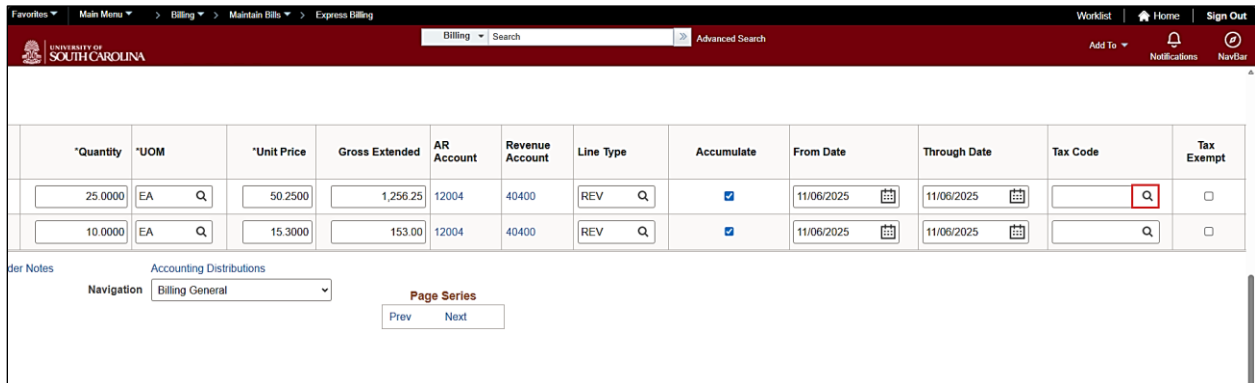
Step 25: To add sales tax for all taxable goods and services, return to the **Billing General** page by clicking the **Billing General** tab.



Step 26: In the Bill Lines section, click the **Arrow** symbol next to the Line Information tab to view additional fields.



Step 27: Scroll to the **Tax Code** field.



Step 28: Click the **Tax Code Lookup** button to select the appropriate county code for your campus/department. Add the Tax Code to all applicable billing items. Be sure to click the **Save** button once the Tax Code field is populated.

The screenshot displays the 'Look Up Tax Code' dialog box over a billing interface. The dialog box contains the following elements:

- *SetID:** MSCAR
- Tax Code:** begins with []
- Buttons:** Search, Clear, Cancel, Basic Lookup
- Search Results:** View 100 (1-24 of 24)
- Table of Tax Codes:**

Tax Code	Description
MS1002	Misc AR Aiken County
MS1003	Misc AR Allendale County
MS1007	Misc AR Beaufort County
MS1009	Misc AR Calhoun County
MS1010	Misc AR Charleston County
MS1022	Misc AR Georgetown County
MS1023	Misc AR Greenville County
MS1030	Misc AR Laurens County
MS1032	Misc AR Lexington County
MS1040	Misc AR Richland County
MS1041	Misc AR Saluda County
MS1042	Misc AR Spartanburg County
MS1044	Misc AR Union County

The background interface shows a billing table with the following data:

*Quantity	*UOM	*Unit Price	Gross Extended	AR Account
25.0000	EA Q	50.2500	1,256.25	12004
10.0000	EA Q	15.3000	153.00	12004

Before updating the Bill Status, always review the invoice details for accuracy by using the **Related Content** which can be found at the top right of the screen.

Step 29: Click the **Related Content** drop-down arrow.

Step 30: Click the **Billing Details** option.

Step 31: The Bill Lines query populates at the bottom of the Express Bill page. Be sure to pay attention to the following:

- Line Amounts
- Total Invoice Amount
- Chartfield Information
- Tax Code and Description

Billing General

Unit: SCAIK Invoice: AK00000980 Pretax Amt: 1,409.25 USD

Bill Status: NEW *Invoice Date: 11/06/2025

*Bill Type: AIK *Frequency: Once

Cycle ID: MISC_AR

> Customer Information

> Payment Information

▼ Header Detail

*Accounting Date: 11/06/2025

▼ Related Content **Billing Details (Estimated)**

Row	Business Unit (Campus)	Bill Status	Invoice Number	Invoice Date	Due Date	Customer ID	Customer Name	Line Number	Line Description	Line Quantity	Line Unit Price	Line Amount	Line Tax Amount (Estimated)	Line Total Amount (Estimated)	Invoice Pretax Amt	Invoice Total Tax Amt (Est)	Invoice Total Amt (Est)	Accounting Date	Line Distrib Line Num	Line Distribution Amount	Operating Unit	Department	Fund	Account Class	I/C Business Unit	Project	Activity	Cost Share	Created By ID	Created by Name	Employee USCID	
1	SCAIK	NEW	AK00000980	11/06/2025		CST0000043	Alken Regional Medical Centers	1	Web Shooters	25.0000	50.2500	1256.250	0.000	1256.250	1409.250	0.000	1409.250	11/06/2025	1	1256.250	AK000	911164	E2084	40400	301					MGTODD	Majorie Todd	Q49154725
2	SCAIK	NEW	AK00000980	11/06/2025		CST0000043	Alken Regional Medical Centers	2	Fishing Nets	10.0000	15.3000	153.000	0.000	153.000	1409.250	0.000	1409.250	11/06/2025	1	153.000	AK000	911164	E2084	40400	301					MGTODD	Majorie Todd	Q49154725

Step 32: Click the three vertical dots to close the Billing Details query before updating the Bill Status to RDY.

The screenshot shows the 'Billing General' section with fields for Unit (SCAIK), Invoice (AK00000980), Pretax Amt (1,409.25 USD), Bill Status (NEW), Invoice Date (11/06/2025), Bill Type (AIK), Cycle ID (MISC_AR), and Frequency (Once). Below this is the 'Billing Details (Estimated)' table with columns for Business Unit, Bill Status, Invoice Number, Invoice Date, Customer ID, Customer Name, Line Number, Line Description, Line Quantity, Line Unit Price, Line Amount, Line Tax Amount, Line Total Amount, Invoice Pretax Amt, Invoice Total Tax Amt, Invoice Total Amt, Accounting Date, Line Distrib Line Num, Line Distribution Amount, Operating Unit, Department, Fund, Account, Class, IC Business Unit, Project, Activity, Cost Share, Created By ID, and Name. A red box highlights the 'Close' button in the top right corner of the table.

Step 33: When all billing information has been reviewed and finalized, click the **Billing Status Lookup** button to change the status from **NEW** to **RDY**. Click the **Save** button once the status is updated.

The screenshot shows the 'Billing Status Lookup' dialog box. It contains a list of bill statuses: CAN Canceled, FNL Finalized Bill, HLD Hold Bill, INV Invoiced Bill, NEW New Bill, PND Pending Approval, RDY Ready to Invoice (highlighted with a red box), TMP Temporary Bill, and TMR Temporary Ready Bill. There is a 'Cancel' button at the bottom of the dialog box. The background shows the 'Billing General' section with the Bill Status field set to 'NEW' and a search icon next to it.

Step 34: Notice the **Invoice** number is populated, and Bill Status is **RDY**.

The screenshot shows the 'Billing General' page in the University of South Carolina system. The 'Invoice' field is populated with 'AK00000980' and the 'Bill Status' is 'RDY'. Other fields include 'Pretax Amt' of 1,409.25 USD, 'Invoice Date' of 11/06/2025, 'Bill Type' of AIK, and 'Cycle ID' of MISC_AR. A red box highlights the 'Invoice' field, and another red box highlights the 'Bill Status' dropdown menu.

Step 35: Now that all the invoice details have been finalized and the status updated to RDY, it's time to submit the invoice. To do this click the **Invoice** icon at the top right of the page.

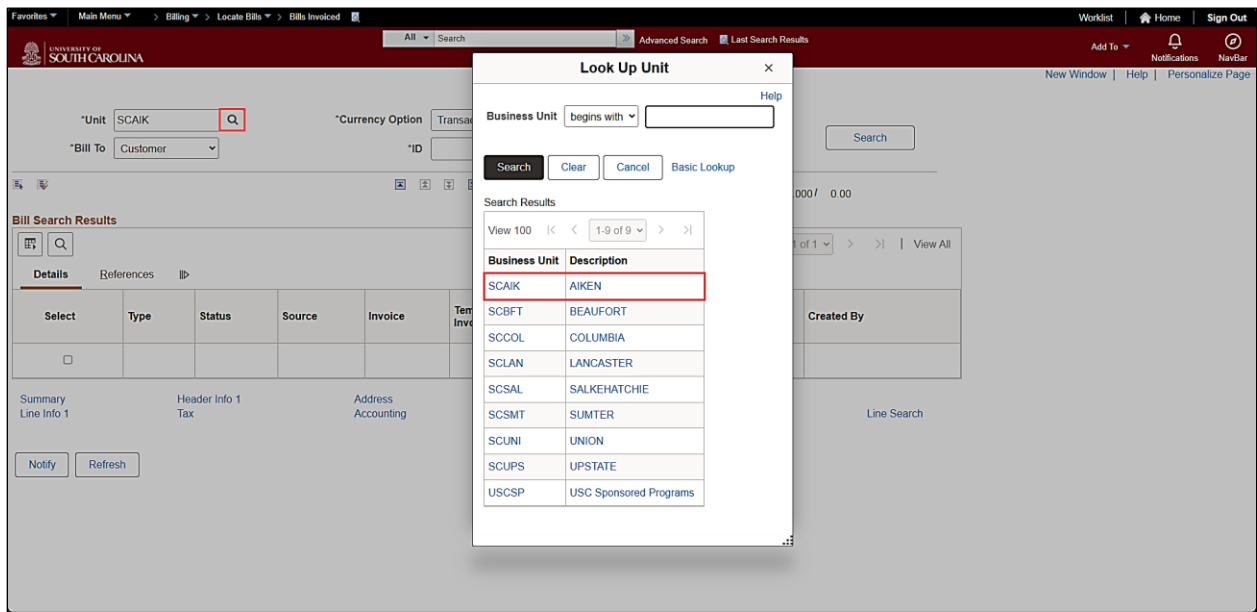
This screenshot is identical to the previous one, but with a red box highlighting the 'Invoice' icon (a document with a checkmark) located at the top right of the main content area.

Step 36: Click the **OK** button when the Success Message appears.

The screenshot shows the 'Billing General' page with a modal dialog box overlaid. The dialog contains the following text: 'The system will email this invoice to the Customer. Would you like to proceed? (30000,258). If you choose "Yes", the system will email this invoice to the customer. If you choose "No" to email, please review and update the Invoice Media option under the Customer Information Address Section.' At the bottom of the dialog are 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box. Below the dialog, the 'Header Detail' section is visible, showing fields for 'Accounting Date', 'From Date', 'To Date', 'Sales Person', 'Credit Analyst', 'Billing Specialist', and 'System Source'. At the bottom of the page, there are controls for 'Lines to Add' (set to 5) and 'Max Rows' (set to 10).

After a few minutes, an invoice can be viewed and saved using the following steps. Use the navigation:
Main Menu > Billing > Locate Bills > Bills Invoiced

Step 37: Click the **Unit Lookup** button and select the unit for your campus.

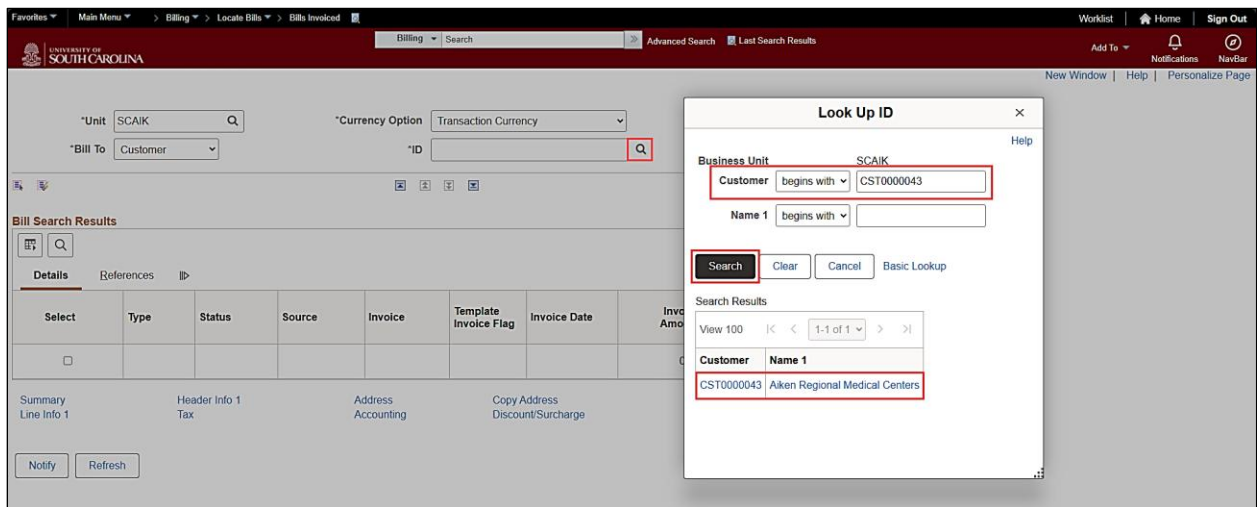


Step 38: On the Billed Invoice page, click the ***ID Lookup** button to select the appropriate customer.

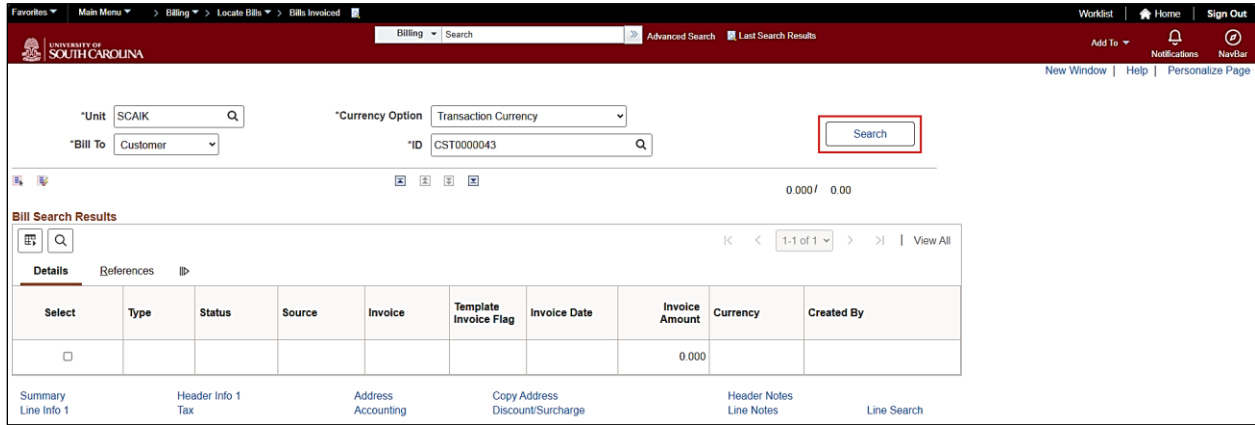
Step 39: Enter the customer ID in the **Customer** field.

Step 40: Click the **Search** button.

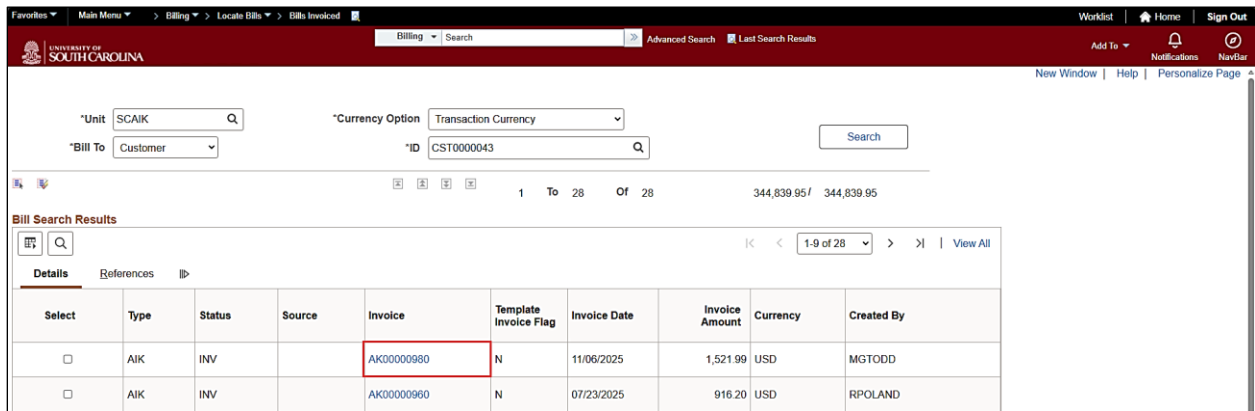
Step 41: Click the link for the customer to populate the ***ID** field on the Bills Invoiced page.



Step 42: Click the Search button.



Step 43: In the Bill Search Results section, click the Invoice link.



Step 44: Click the View Invoice Image link to view/save the invoice.

