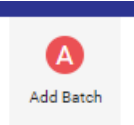


CREATE INVOICES

1. General Revenue, then General Billing
2. Invoice processing
3. Invoice entry and proof

a. ADD BATCH



b. Keep default dates – no changes. **Select Accept**



i. Input customer number Or Search (see next step to search)

1. To search select “...”

Customer *

ii. Search name, address, use wildcard *

Customer Search

Customer

Customer number

Active

Person/Entity

Name

SOLANO*

Address

City, State, ZIP

Country

iii. Select AR code from drop down menu

AR code *

CMDEV - COMMUNITY DEVELOPMENT



iv. Select +1 next to invoice – it will autofill next invoice number

Invoice *

Project Strings apply

v. Leave installments / discount code all the same / case acct # doesn't change. No other changes to make. SELECT ACCEPT – (at top of screen.)



4. OK through warning message if you receive it.

- SELECT CHARGE CODE** from drop down menu

Charge code *

- INPUT QUANTITY AND PRICE**

Quantity UOM

Price

Discount amount

Bill amount

- INPUT NOTES** to customer in the box to the right of the charge code.
 - example: date (AUG 2022) , Citation Number or date, ect.

Line

Charge code *

Quantity UOM

Price

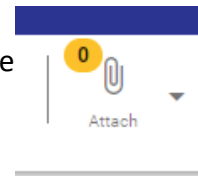


- SELECT ACCEPT** at top of screen

- SELECT BACK ARROW**

- Attach any attachments** by selecting the down triangle

- Select the + , General billing attachment,
- Then drag and drop the attachment,
- Then select import
- Then the floppy disk to save. You can exit out of tab once saved.
-

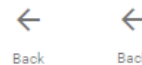


- REPEAT FOR ALL INVOICES – SELECT ADD**

- Follow steps at Star B .



- Hit back arrow two times to get to finalizing screen**



When all invoices are input select back until you get to this screen Select Release (R)

YOU ARE DONE

← Search Browse + Update Output Print Display PDF Save Excel Word Add Batch View Batch Resume Release Output Post

Batch Information

Clerk

Invoice count

Amount total

Default invoice date *

GL effective date *

Year/period * JUL

Batch *

Payment terms