

Online Invoice Form Instructions

The online invoice form was developed to replace all individually office invoicing templates. It should be utilized to report all accounts receivable to ensure proper and timely delivery of funds. Once the form is completed, a .TIF image of the form will be delivered to the creator's inbox, which can be printed off and provided to the vendor.

These instructions were developed to assist form creators. Questions should be directed to the Office of Student Accounts at osa@millersville.edu or (717) 871-5101.

The upper right-hand corner of the form presents an Invoice Number, Date of Invoice and Due Date. These items are not adjustable and will prefill at the time the form is created.

Invoice Number	ARI1
Date of Invoice	09/28/2023
Due Date	10/28/2023

Completing Vendor Information

Vendor ID – this is the non-student ID number associated with the account and starts with the letter 'M', followed by 8 digits.

Once the Vendor ID is entered, the **Vendor Name, Addresses, City, State and Zip** will auto-populate.

If any of the information that auto-populates as being associated with the ID is inaccurate or missing, check the box to update them manually.

Please note – clicking this box will not automatically make the form fields adjustable. You must click on each description that you wish to update.

City	Lancaster
<input type="checkbox"/> Update City	
State	
<input type="checkbox"/> Update State	
Zip	
<input type="checkbox"/> Update Zip	
<input checked="" type="checkbox"/> Do any of the above fields not match or are empty? If so click this checkbox and the option to update them manually will appear	

Second, click the field you need to update. Then, enter the new information.

First, check the box!

****Please note – any updates information provided on the form will be entered into Banner and linked to the ID from that point forward.****

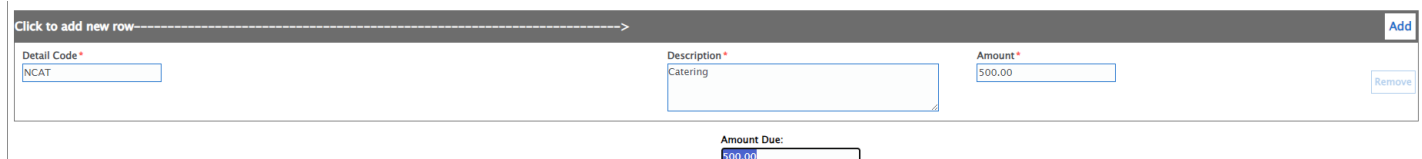
Adding Billable Items

Detail Code – this is a 4-letter code that represents your billable item within the Banner system. It will always start with the letter ‘N.’ If you are unsure of what code to use, please contact OSA.

Description – a brief description of the receivable your 4-letter code is linked to (ex: catering, basketball court rental, etc).

Amount – the amount you are billing for the previously referenced item.

Add and Remove items as needed.



The screenshot shows a web form with a dark header bar containing the text "Click to add new row" and an "Add" button. Below the header, there are three input fields: "Detail Code" with the value "NCAT", "Description" with the value "Catering", and "Amount" with the value "500.00". A "Remove" button is located to the right of the "Amount" field. Below these fields, there is a label "Amount Due:" followed by a text box containing "500.00".

Once the form is to your liking, click Submit in the lower left-hand corner of the form.

Confirmation Email, Processing, and Adjustments

Once the form is submitted, the creator will receive a confirmation email, providing the .TIF image of the invoice.

The information from the form is entered into a workflow and the receivable is entered into Banner by a member of the OSA staff in a timely manner.

If upon review, there is a discrepancy on the form (ex: detail code does not exist, description does not match detail code, etc) OSA can adjust the form. If an adjustment occurs, the creator will receive a second email alerting them of the change and providing an updated .TIF image.