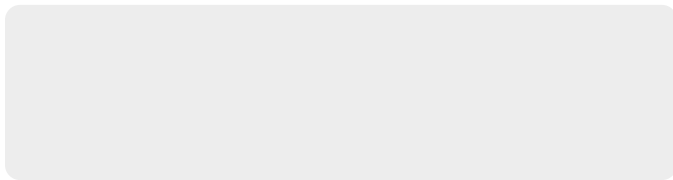


Create Invoice Template

Create Invoice Template

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



2. The invoice page is displayed

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.

- **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)

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

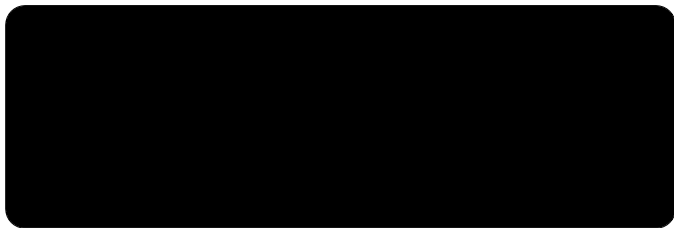
6. Enter a detailed **Business Purpose**.

- 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 (>2(T)-3.fi

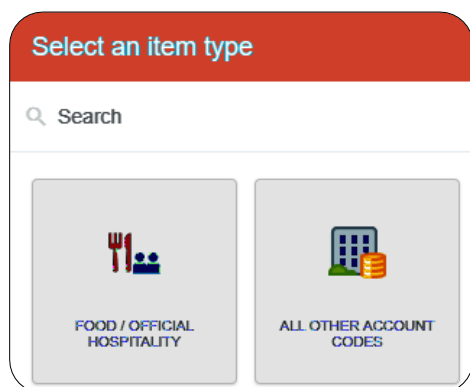
igf.e(s)1..8 (xp)5.3 e f Td(i.2 (-0.8l Td(d7 (a)2.8 ()r)-22.82(-0.8l Td(4.1 (y)-t)00Tf- (s)1..8 (0.6 (n)5p7 (r)1.6 (th)o7 (3.8)4 (

Add Expense

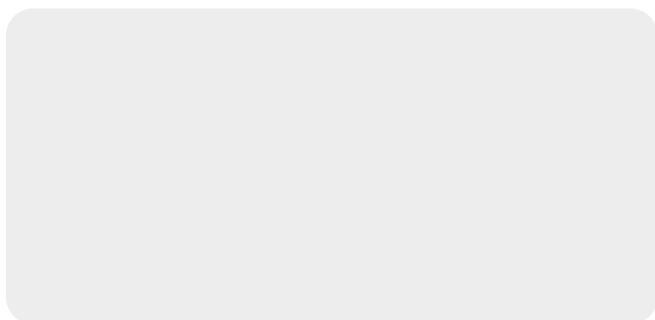
10. Click on the + **Add Expense** button.



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.