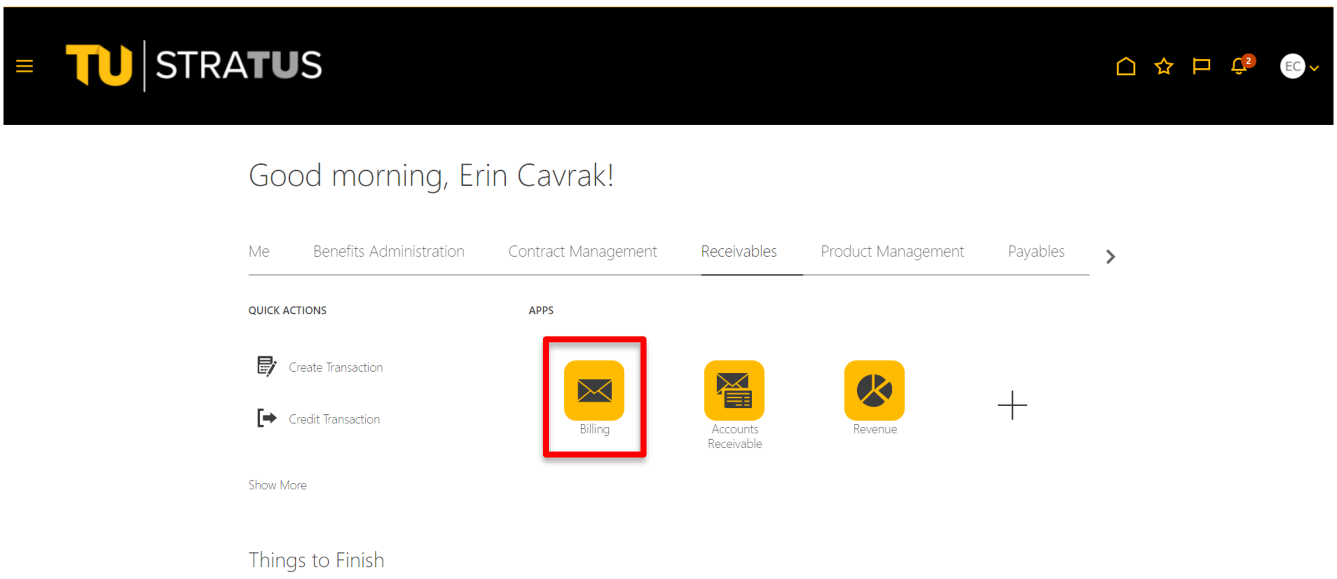
Receivables – Create an Invoice

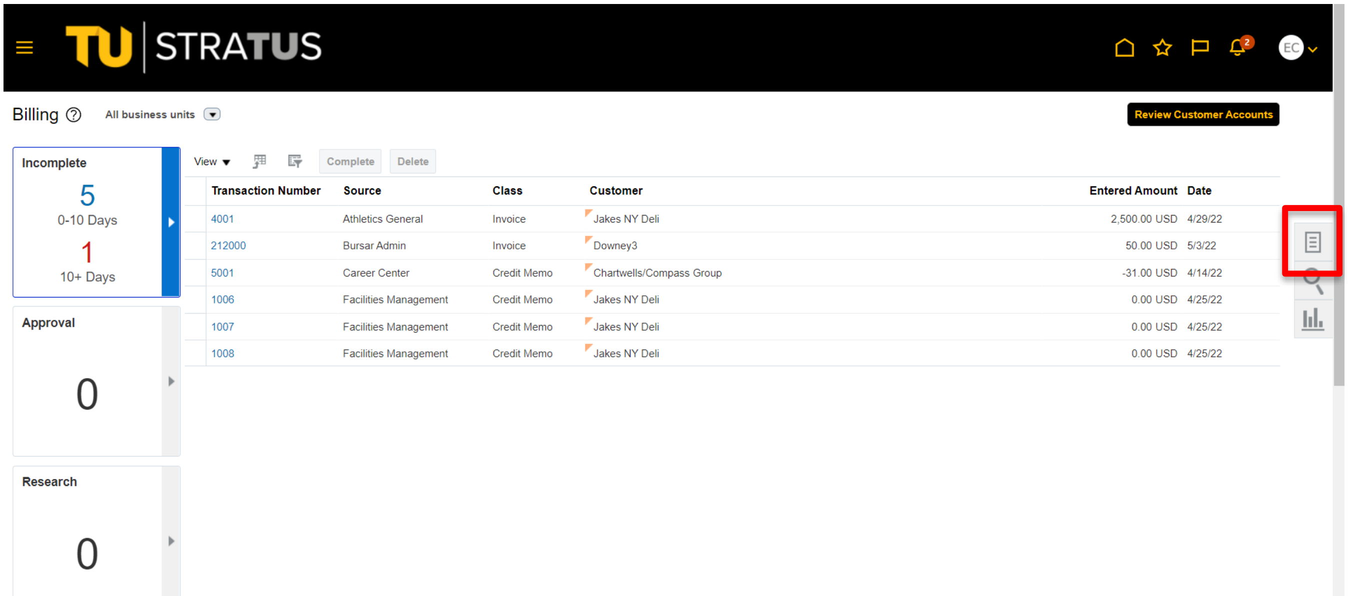
For employees creating an invoice.

Purpose:	Create an invoice.
How to Access:	Log into the STRA**TU**S application. Select the **Receivables** application from the Navigator.
Helpful Hints:	Be sure to keep in mind that… • Supporting documents can be attached.
Procedure:	Complete the following steps to create an invoice:

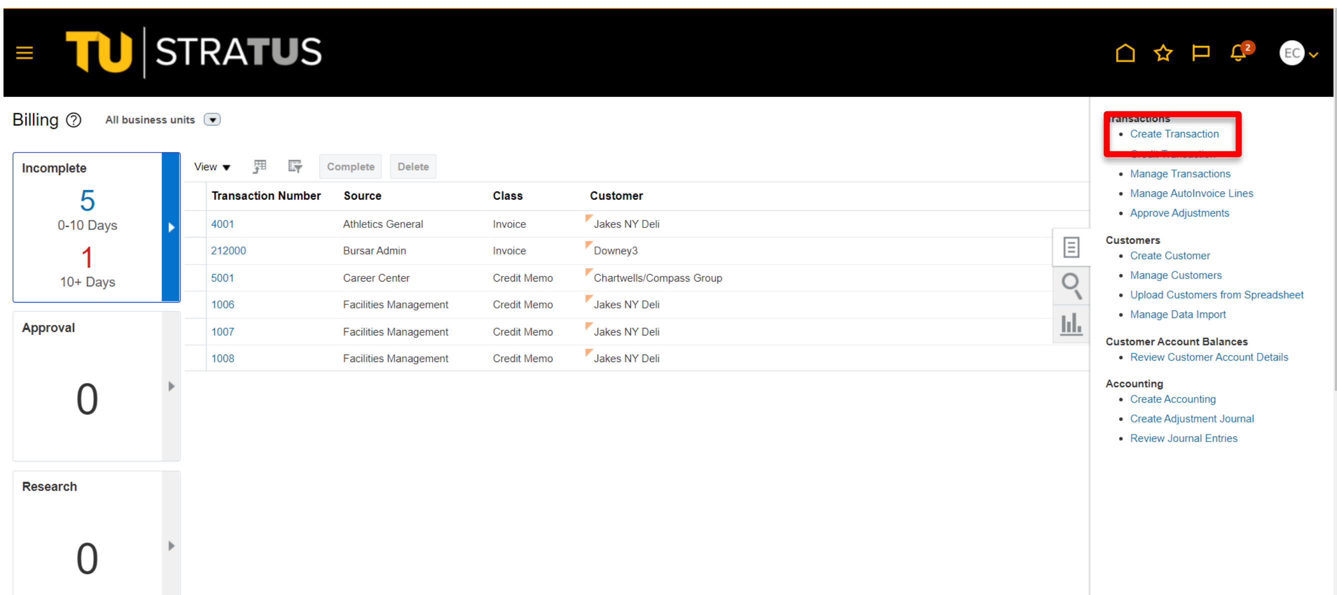
1. On the homepage, select **Billing** under **Receivables** from the sliding menu in the center of the screen.



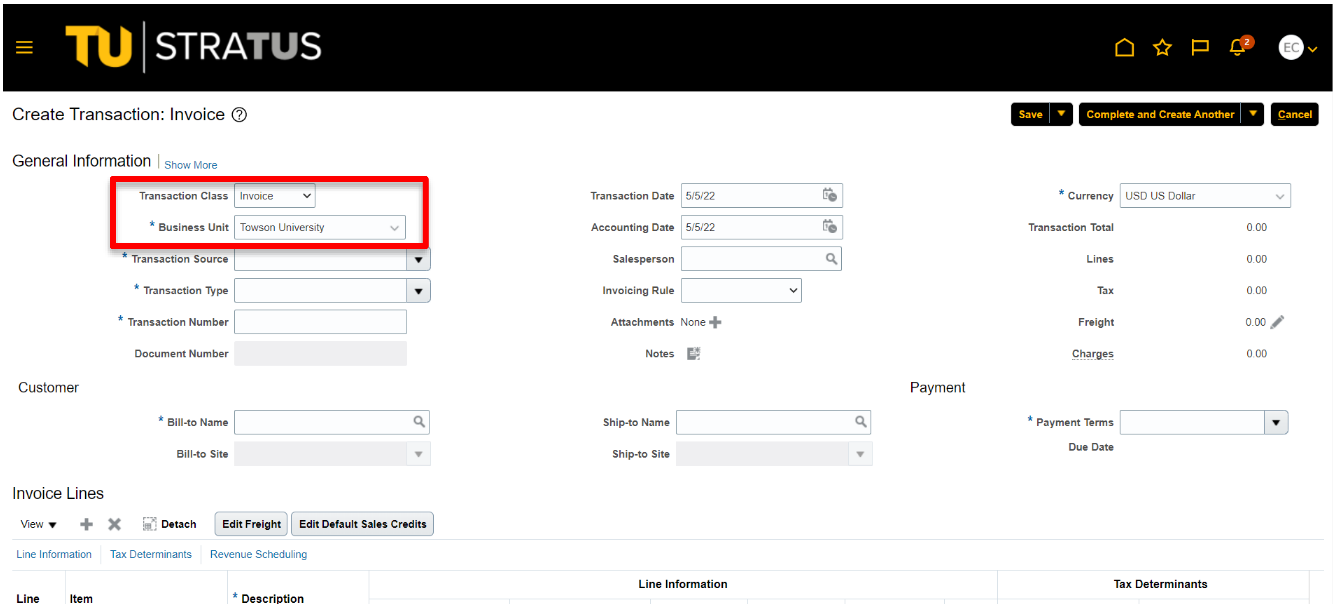
2. On the billing menu, click the **tasks** icon on the right side of the page.



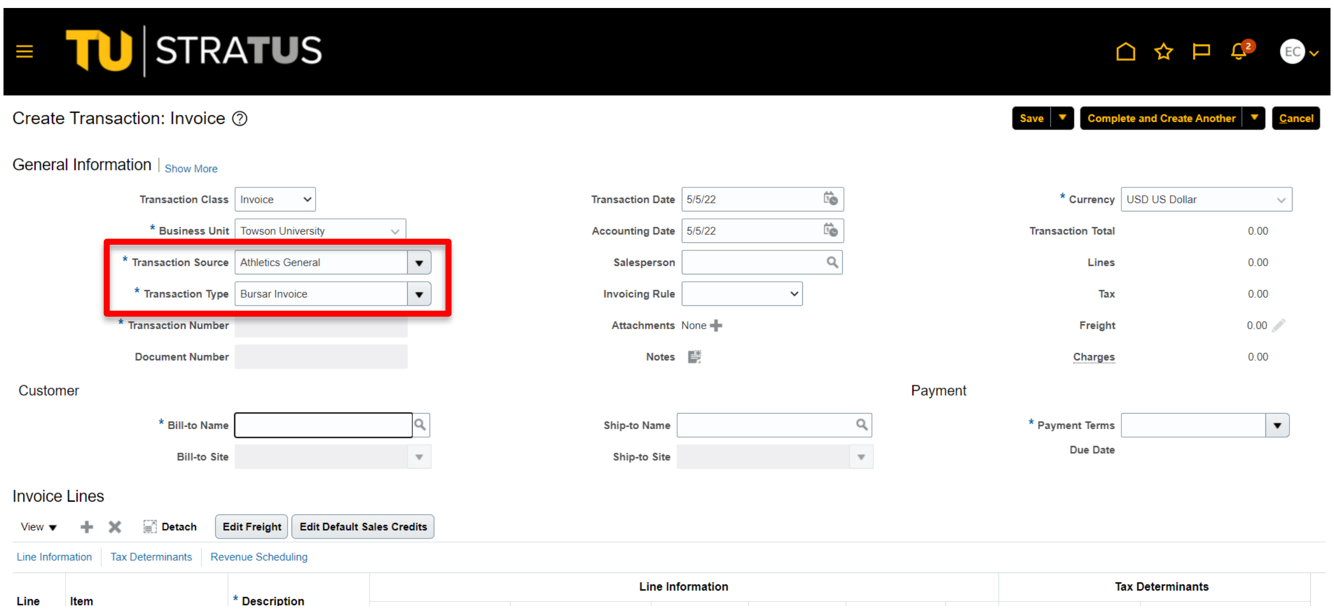
3. Select **Create Transaction**.



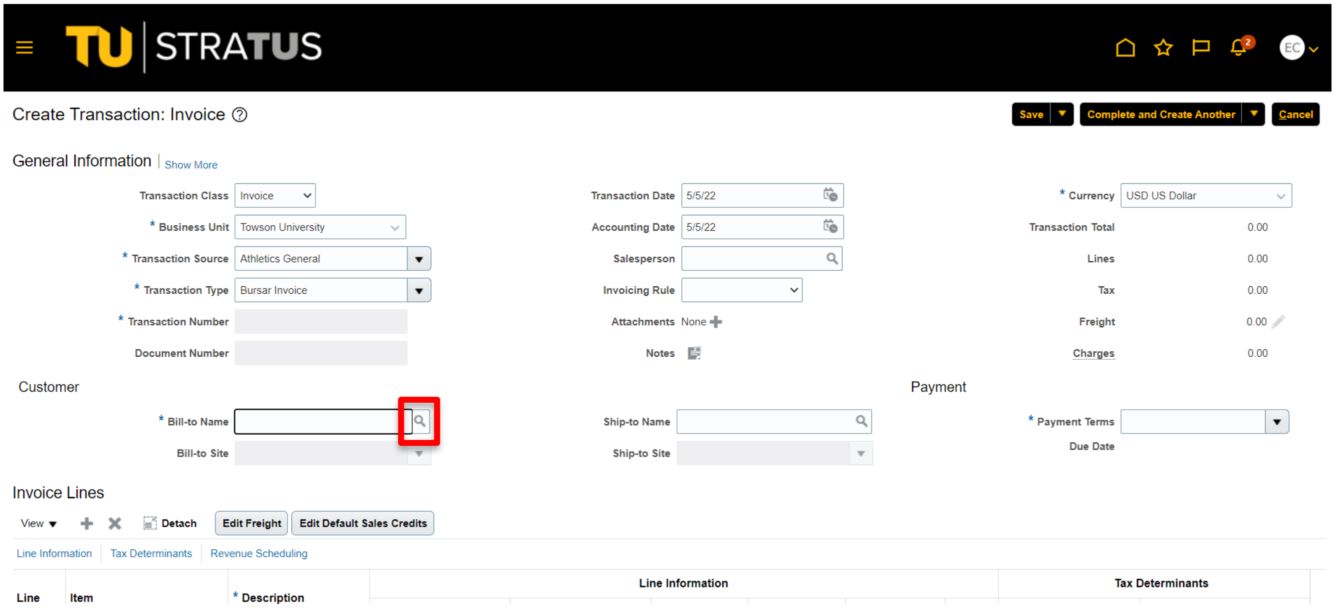
4. The **Transaction Class** field will auto-populate to Invoice (leave as-is). The **Business Unit** field will also auto-populate to Towson University (leave as-is).



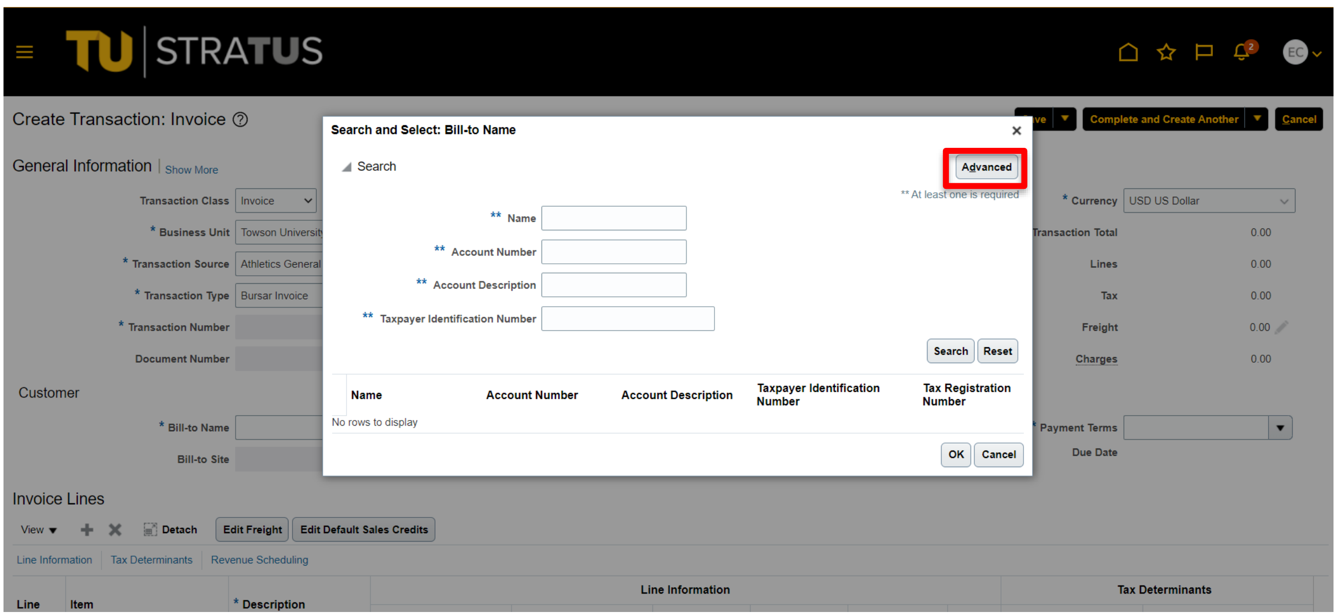
5. From the **Transaction Source** dropdown, select your department. **Transaction type** will then auto-populate.



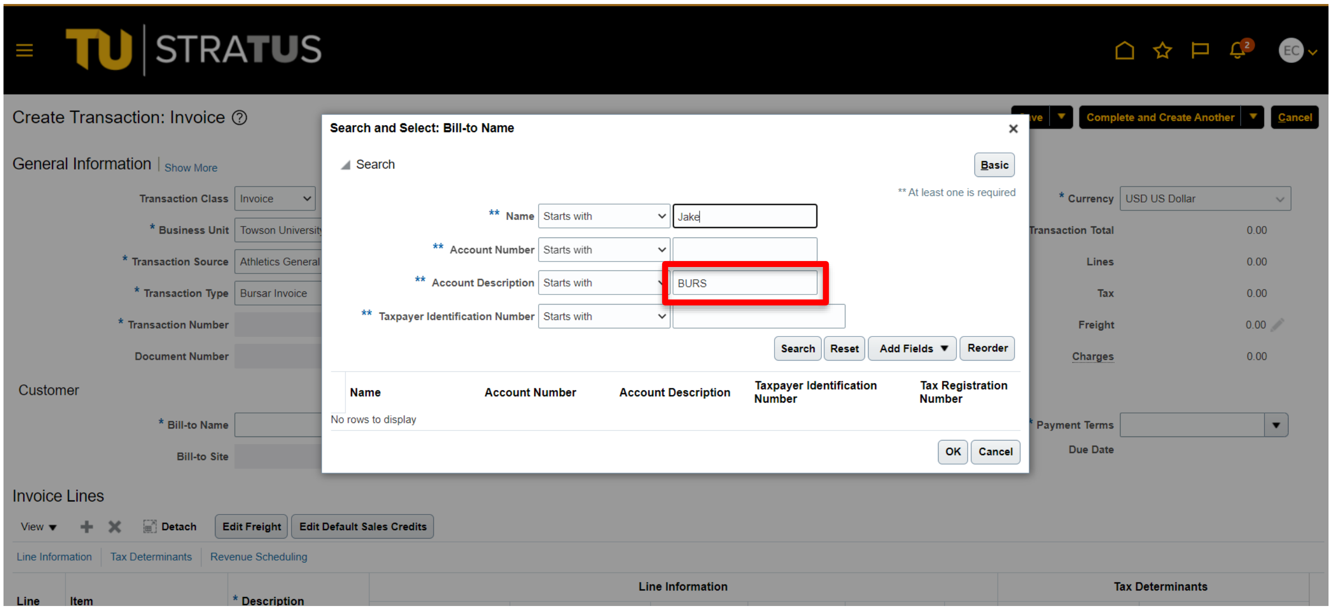
6. Click the **magnifying glass icon** next to Bill-to-Name.



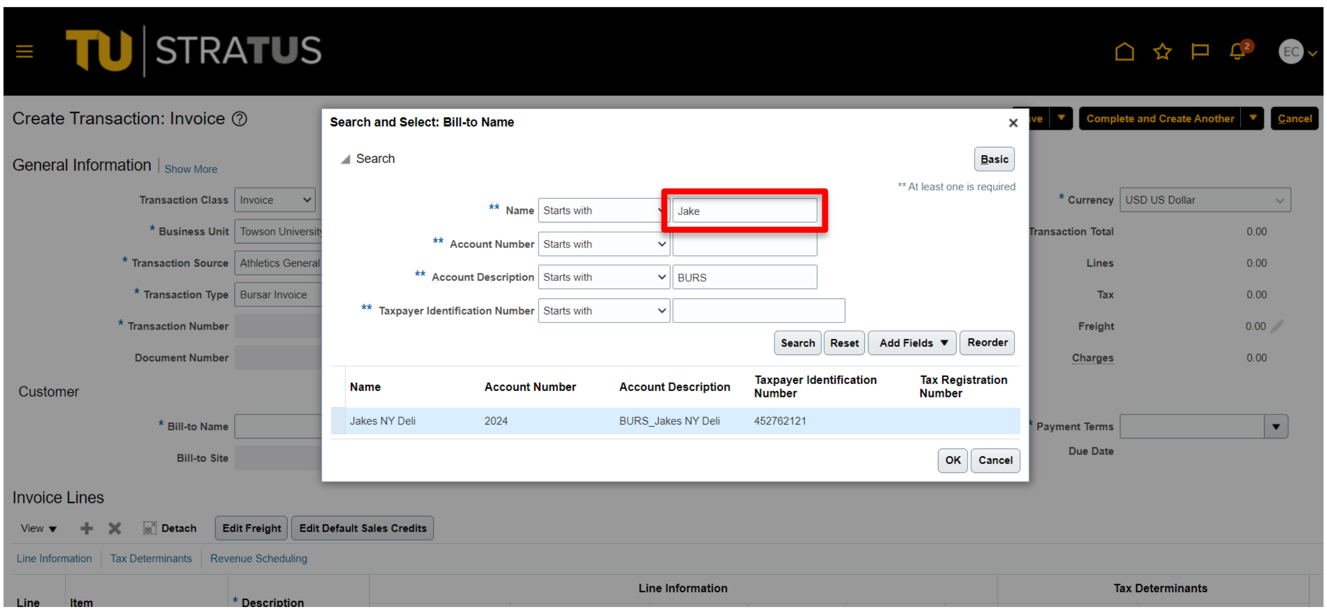
7. Click the Advanced button on this search menu.



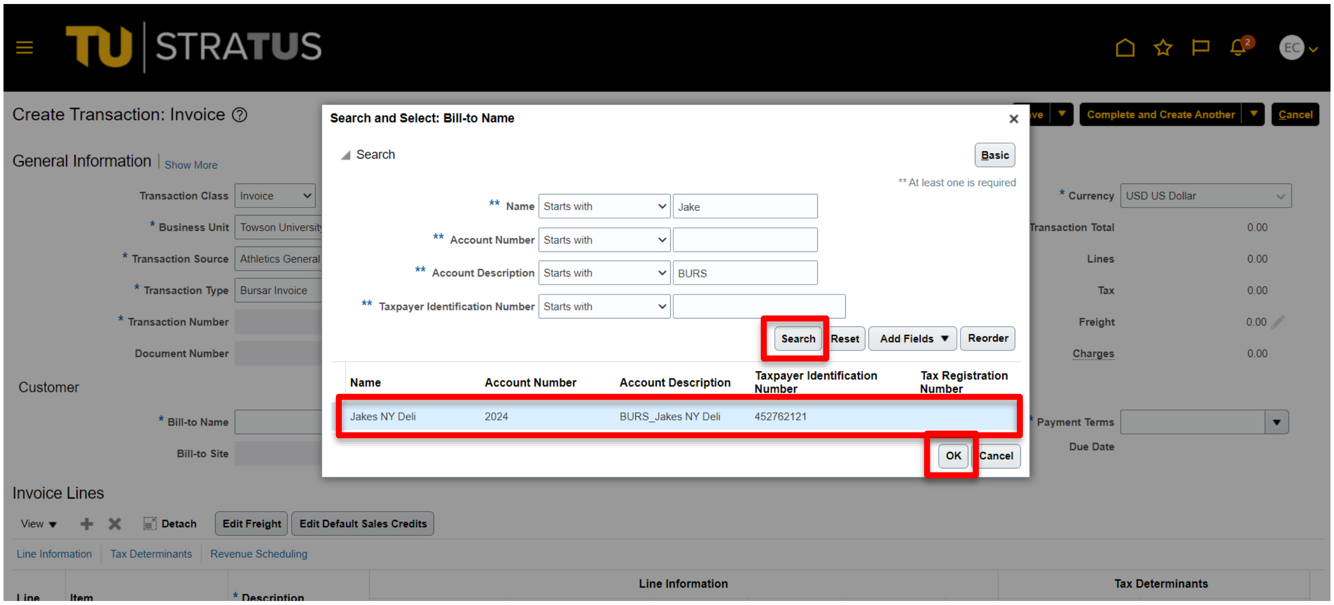
8. In the **Account Description** field, enter “BURS”, “SPAR”, or “OSPR”.



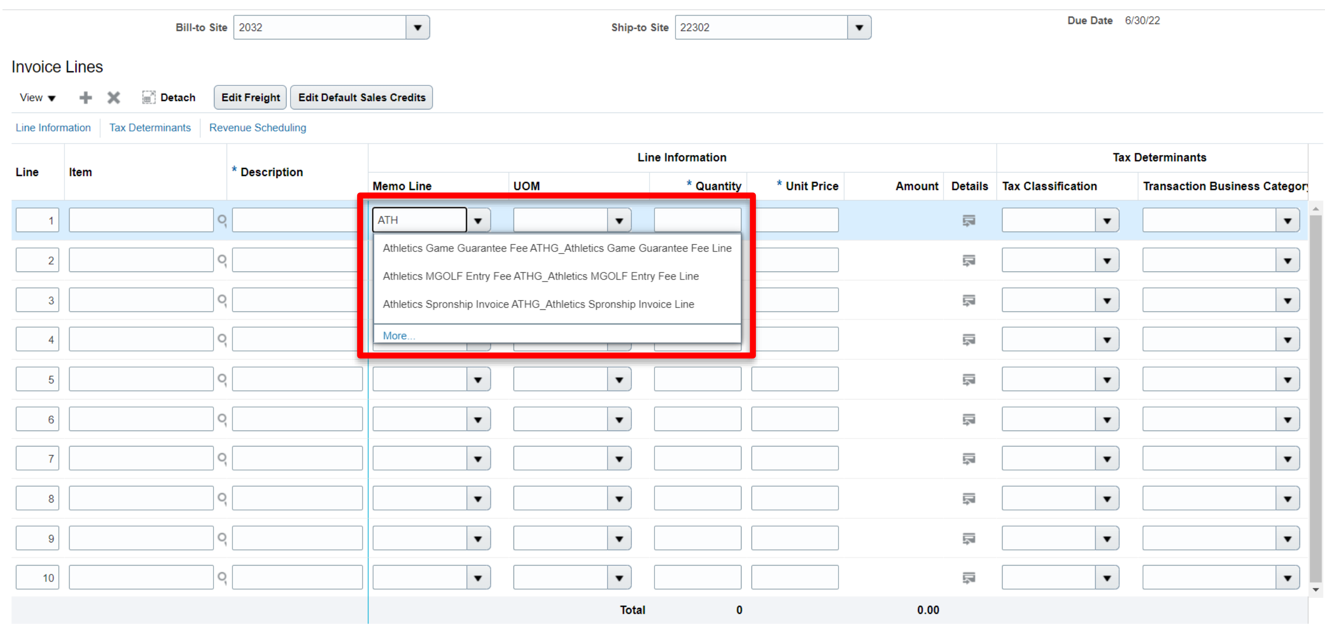
9. In the **Name** field, enter the organization’s name.



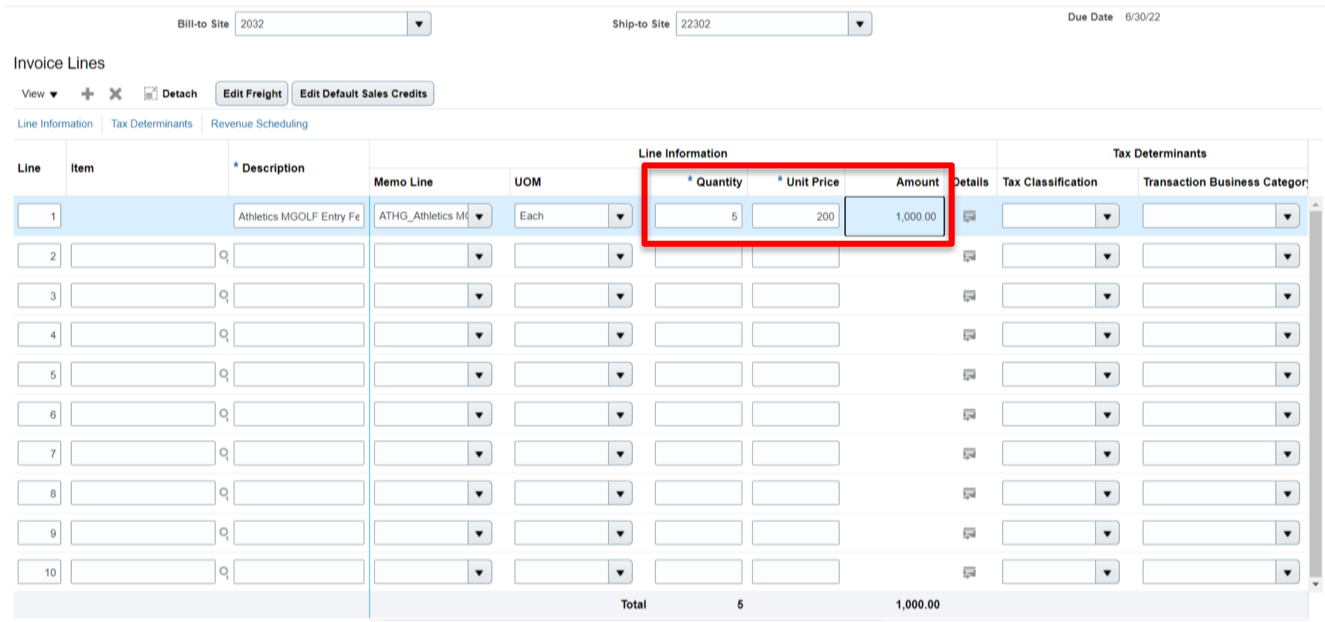
10. Click **Search**. Select the organization you to bill. Click **Okay** to return to the invoice.



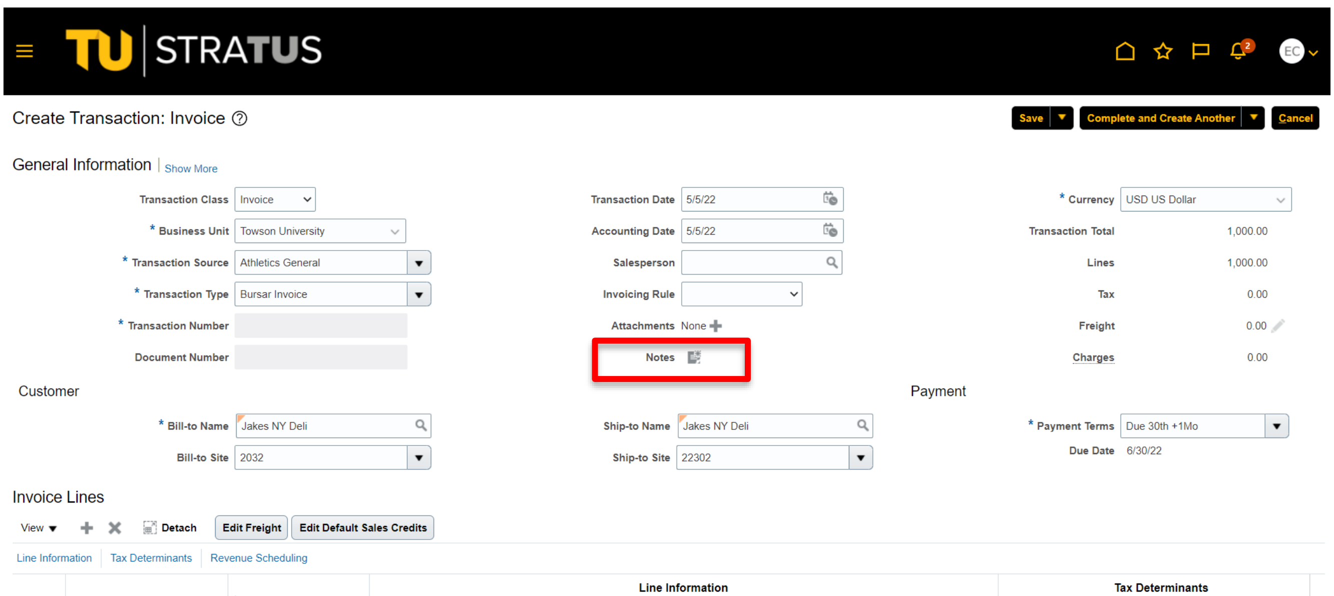
11. Scroll down to the invoice line section. Under the **Memo Line** header, enter your departments acronym. As you type, a dropdown list will appear. Select the memo line you wish to invoice. (**NOTE**: The **Description** and **UOM** fields will auto-populate when you select the memo line.)



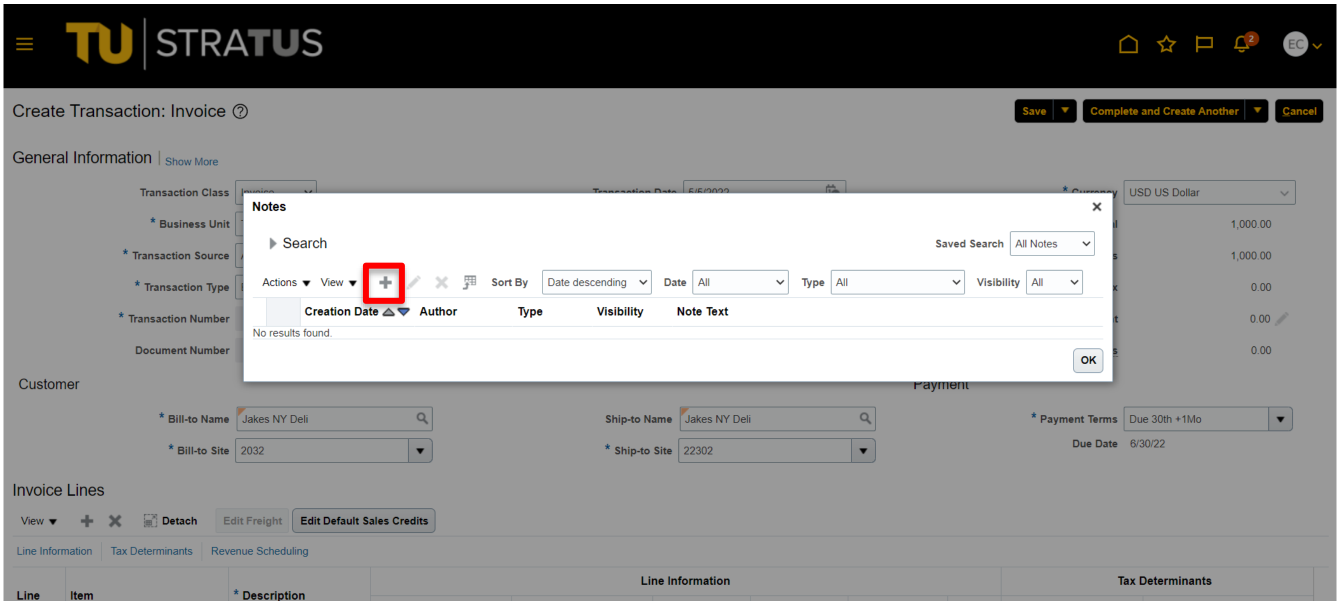
12. Enter **Quantity** and **Unit Price**. (**NOTE**: The **Amount** field will then auto-populate.)

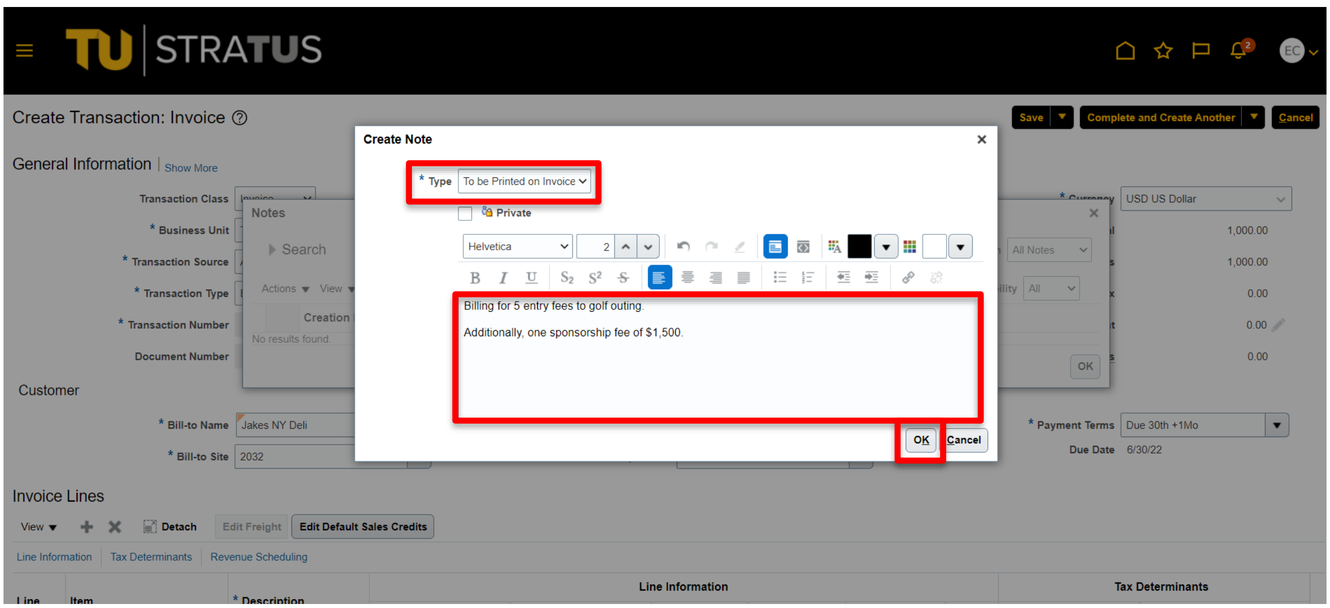


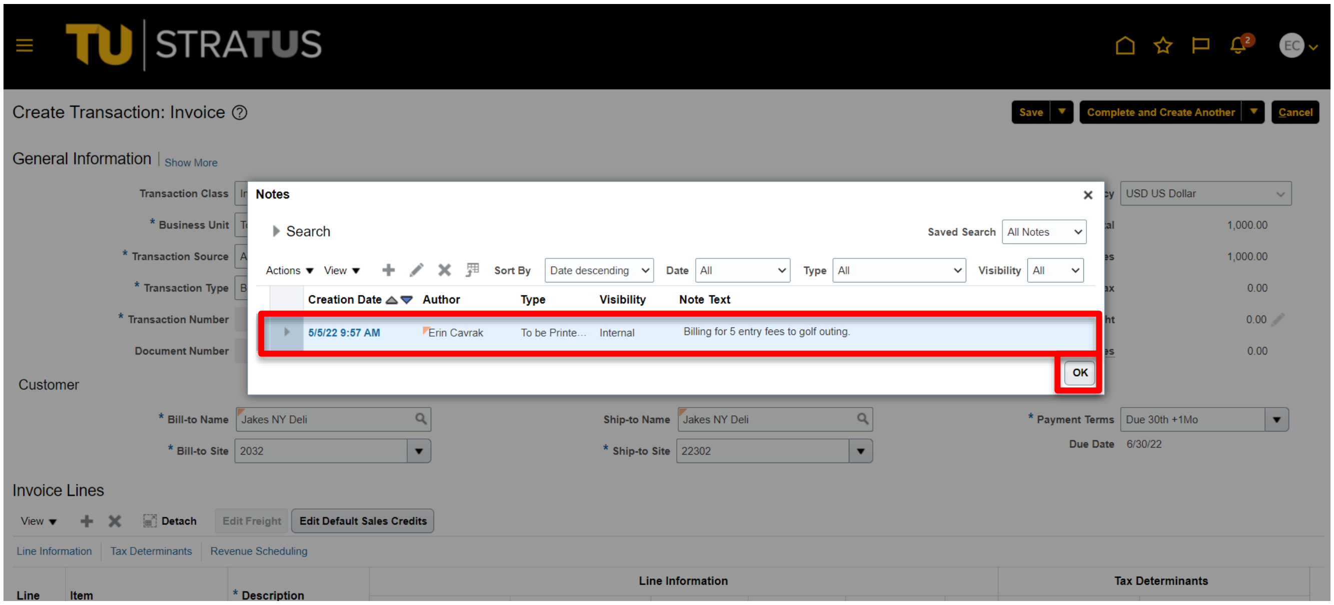
13. Repeat the above steps for additional memo lines. Once you have added all your memo lines, scroll back to the top. Select the **Notes icon** to be taken to the notes section.



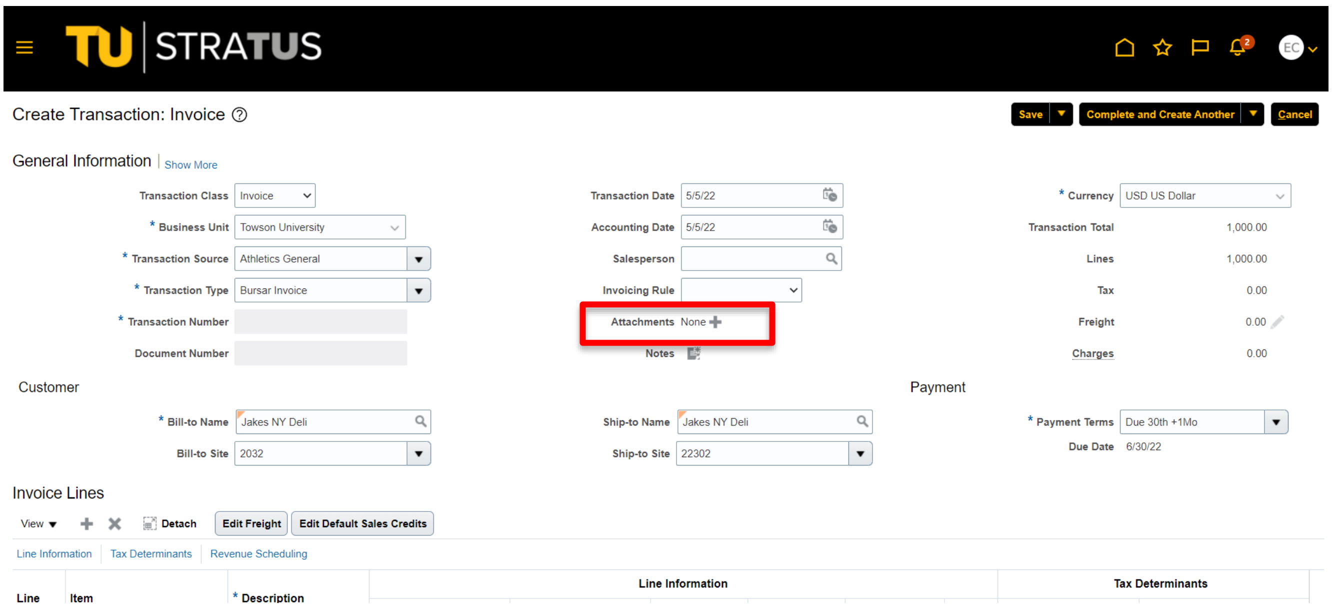
14. Click the **plus (+)** button to create a note. The Type field should auto-populate with “To be printed on invoice”. Click in the text box to add your note. Once your note is complete, click **Okay**.


TU STRATUS
Create Transaction: Invoice
Save
Complete and Create Another
Cancel
General Information
Show More
Transaction Class
Business Unit
Transaction Source
Transaction Type
Transaction Number
Document Number
USD US Dollar
1,000.00
1,000.00
0.00
0.00
0.00
Notes
Search
Saved Search
All Notes
Actions
View
Sort By
Date descending
Date
All
Type
All
Visibility
All
Creation Date
Author
Type
Visibility
Note Text
No results found.
OK
Customer
Payment
Bill-to Name
Jakes NY Deli
Bill-to Site
2032
Ship-to Name
Jakes NY Deli
Ship-to Site
22302
Payment Terms
Due 30th +1Mo
Due Date
6/30/22
Invoice Lines
View
Detach
Edit Freight
Edit Default Sales Credits
Line Information
Tax Determinants
Revenue Scheduling
Line
Item
Description
Line Information
Tax Determinants

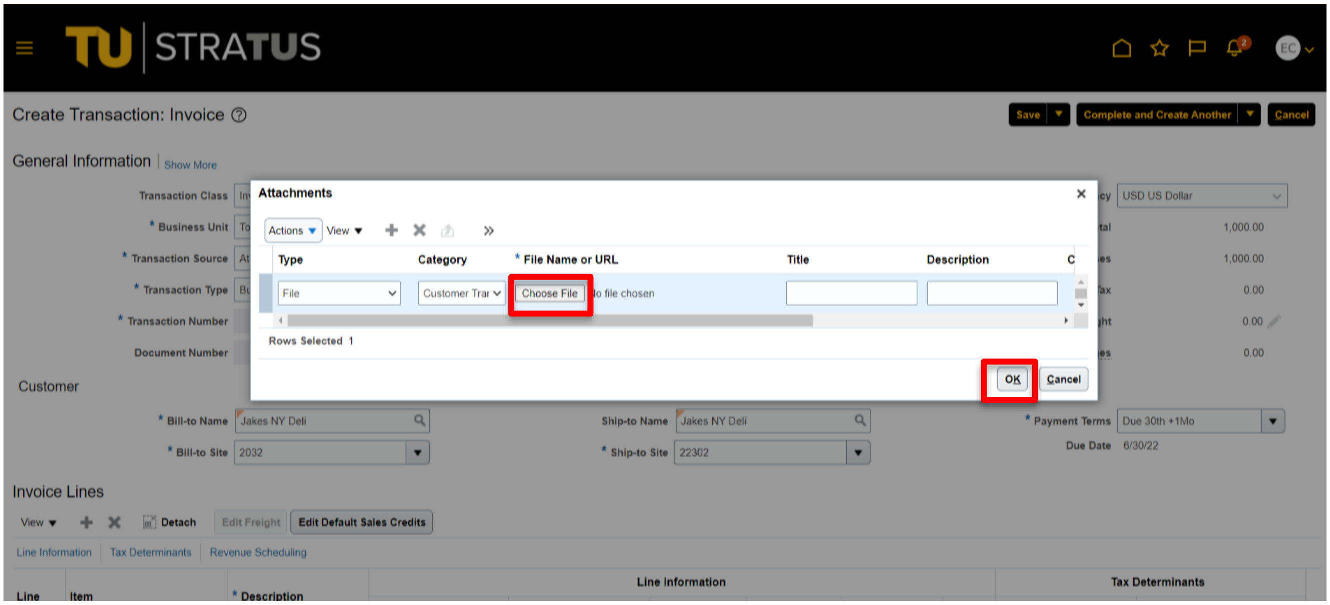

TU STRATUS
Create Transaction: Invoice
Save
Complete and Create Another
Cancel
General Information
Show More
Create Note
Type
To be Printed on Invoice
Private
Helvetica
2
Billing for 5 entry fees to golf outing.
Additionally, one sponsorship fee of $1,500.
OK
Cancel
Customer
Bill-to Name
Jakes NY Deli
Bill-to Site
2032
Payment Terms
Due 30th +1Mo
Due Date
6/30/22
USD US Dollar
1,000.00
1,000.00
0.00
0.00
0.00
Invoice Lines
View
Detach
Edit Freight
Edit Default Sales Credits
Line Information
Tax Determinants
Revenue Scheduling
Line
Item
Description
Line Information
Tax Determinants



15. To include an attachment, click the **plus (+)** sign next to attachments.

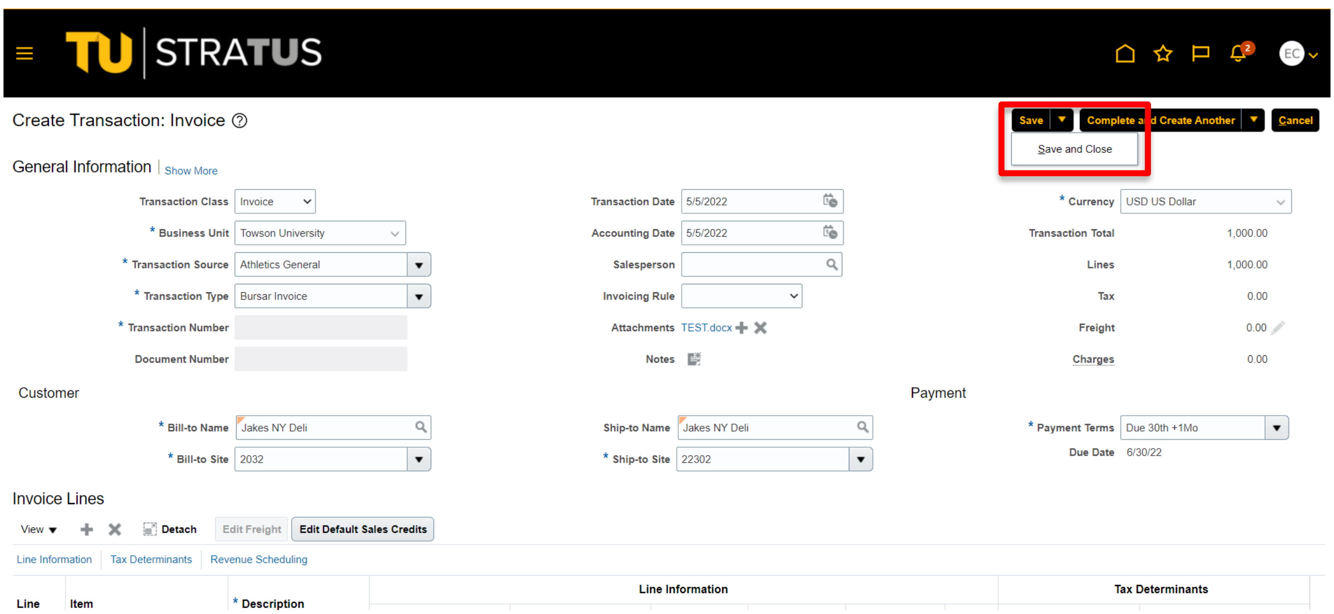


16. Click the **Choose File** button under file name or URL. Select your attachment. Click Okay to return to your invoice.

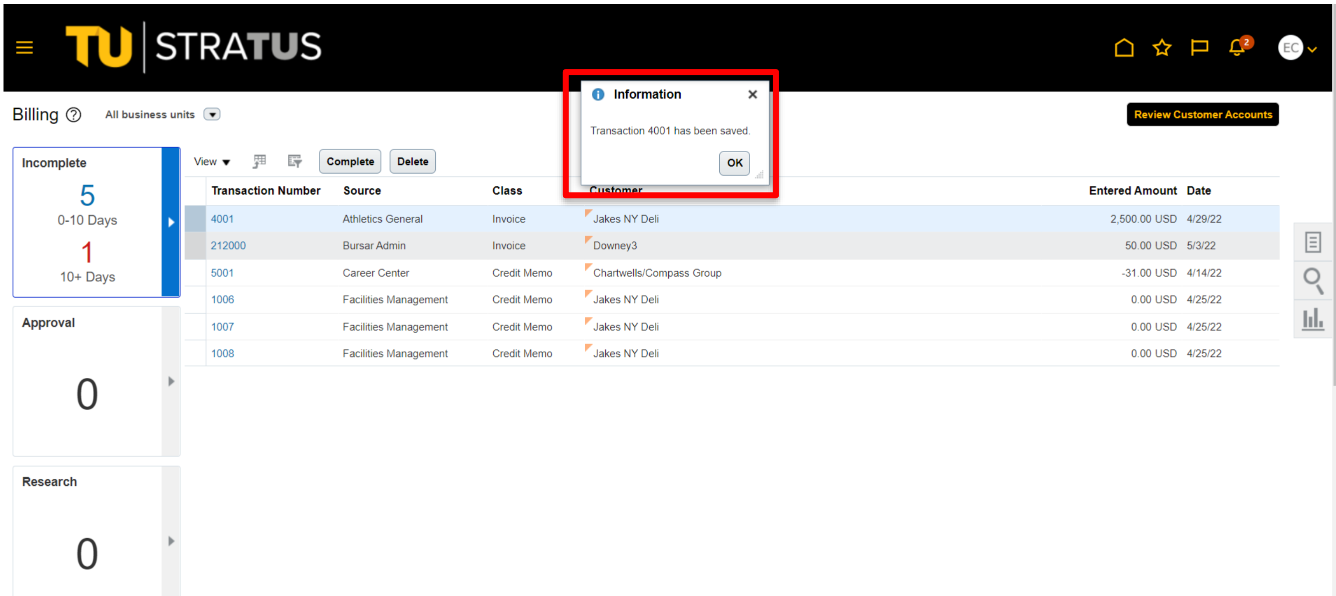


NOTE: To add additional attachments to your invoice, select the plus sign again and repeat steps 16 and 17.

17. When you are finished with your invoice, click the arrow button next to Save and select **Save and Close.**



18. The invoice will be created. You will receive a confirmation message with the invoice number.


TU STRATUS
Information
Transaction 4001 has been saved.
OK
Billing
All business units
Review Customer Accounts
Incomplete
5
0-10 Days
1
10+ Days
Approval
0
Research
0
View
Complete
Delete
Transaction Number
Source
Class
Customer
Entered Amount
Date
4001 Athletics General Invoice Jakes NY Deli 2,500.00 USD 4/29/22
212000 Bursar Admin Invoice Downey3 50.00 USD 5/3/22
5001 Career Center Credit Memo Chartwells/Compass Group -31.00 USD 4/14/22
1006 Facilities Management Credit Memo Jakes NY Deli 0.00 USD 4/25/22
1007 Facilities Management Credit Memo Jakes NY Deli 0.00 USD 4/25/22
1008 Facilities Management Credit Memo Jakes NY Deli 0.00 USD 4/25/22