



Procedure for submitting backup documentation with an external invoice

INSTRUCTIONS FOR THE DEPARTMENT:

1. All backup documentation must be saved as a pdf file. An excel or word document can be saved as a pdf file by clicking File, Save As, click the drop down list next to Save As Type, scroll down to PDF and click SAVE. This newly created pdf document is the file to select when attaching it to the email in step 2.
2. Prepare the external invoice which requires backup documentation and click the SUBMIT TO BILLING button on the invoice form. This will open an email with the external invoice attached.
3. **IMPORTANT!** Be sure not to type text into the email. ITSD has entered code on this form behind the scenes and additional text affects the validity of the form.
4. Using the mouse, left click the pdf file containing the supporting documentation and drag the file onto the email.
5. The email will be addressed TO: INAcctg. Add the budget authority's email address in the "CC:" line and click the SEND button.
6. The budget authority reviews the invoice and clicks the SUBMIT TO BILLING button.

INSTRUCTIONS FOR THE BILLING DEPARTMENT:

1. The invoice sent by the budget authority will append to the invoice with backup docs sent by the invoice preparer.
2. The Billing department should delete the 1st invoice copy and the 1st email information page sent by the preparer and keep the invoice sent by the budget authority along with all supporting documentation.
3. The invoice and supporting docs are ready to be processed.



Procedure for submitting backup documentation after an external invoice has been submitted

(this should only be used if necessary – the procedure on page 1 is the preferred method to attach supporting documentation to an invoice)

INSTRUCTIONS FOR THE DEPARTMENT:

1. All backup documentation must be saved as a pdf file. An excel or word document can be saved as a pdf file by clicking File, Save As, click the drop down list next to Save As Type, scroll down to PDF and click SAVE. This newly created pdf document is the file to select when attaching it to the email in step 2.
2. Attach the supporting documentation (in pdf file format) to an email addressed to Billing@uncw.edu and type in the text area that this is supporting documentation for the invoice to “Customer’s Name” in the amount of “\$xxxx”. This will enable the Billing department to attach the backup docs to the correct invoice.

INSTRUCTIONS FOR THE BILLING DEPARTMENT:

1. Drag the supporting documents into the ImageNow workflow, External Invoice Receiving queue, and merge the supporting document(s) with the existing external invoice already in ImageNow.
2. The invoice and supporting docs are ready to be processed.