PAMS V2

Account Invoice

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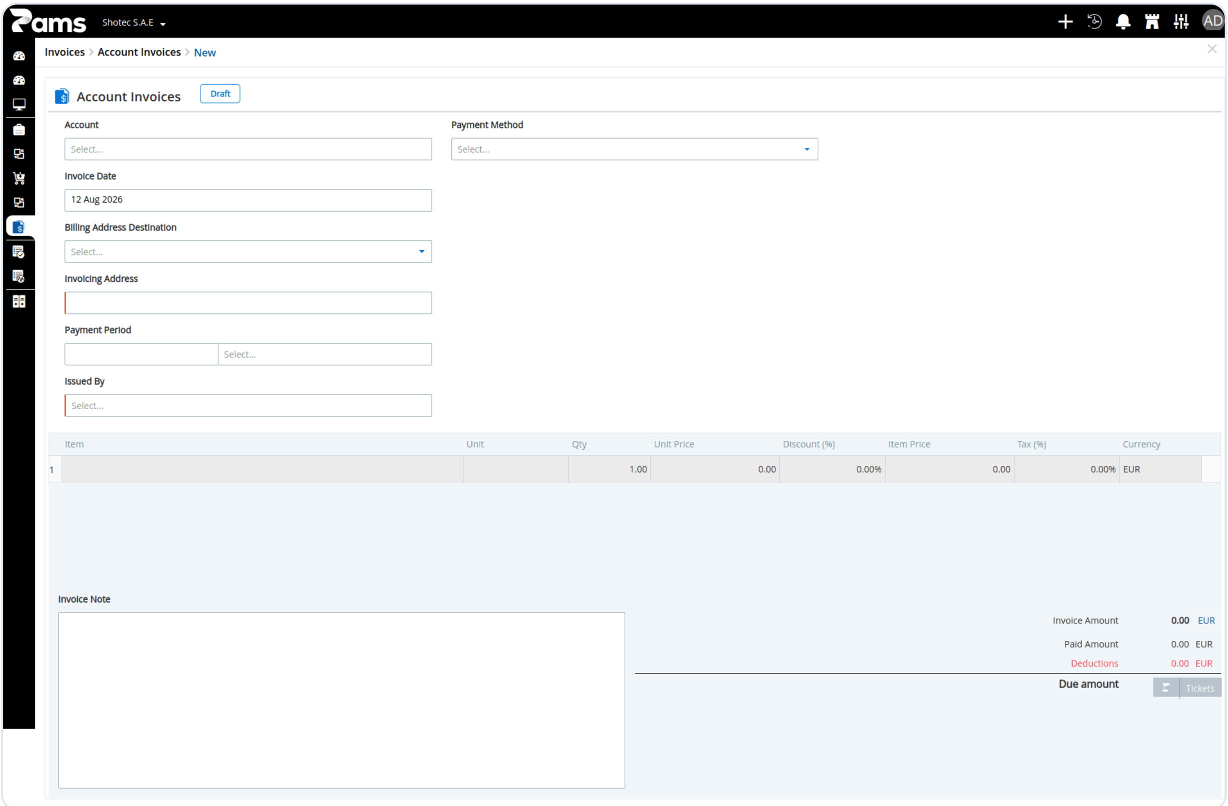
Account Invoice

User Guide › Financial › Invoice



Account Invoice

Overview

Use **Account Invoices** to review and manage an invoice through its financial lifecycle. Finance officers use this page when an invoice requires approval processing, when it becomes Due, and when payment status must be recorded. An Account Invoice progresses from Draft through approval processing to **Approved, Upcoming, Due**, and **Paid**.

Before you start

You must be signed in to use Account Invoices. Before progressing an invoice through approval processing, ensure that the invoice information meets the application’s validation requirements and that the applicable approval process is available.

> **Note:** The page warns you before you leave if the invoice contains unsaved changes.

Steps

1. In the main navigation, select **Finance**.
2. Select **Account Invoices** to access the account invoice workspace.
3. Select the invoice record that you need to review by using **Select**.
4. Review the invoice before applying a status action. Account Invoice records can include amounts, percentages, and currency values.
5. Progress the invoice through the approval process as required. The invoice begins as **Draft** and can proceed through approval processing to **Approved**, then **Upcoming**, and then **Due**. Approval progression requires the invoice to pass validation; where an approval process applies, approval is also required.
6. When the invoice is Due and the principal invoice or invoices are completely paid, select **Consider As Paid**.
7. If payment must no longer be treated as completed, select **Consider As Not Paid**.
8. If an approved invoice must no longer be treated as approved, select **Consider as not approved**. Use this action only when the invoice is eligible for a status correction.

Tips & cautions

> **Warning:** Before selecting **Consider As Paid**, ensure that the principal invoice or invoices are completely paid.

> **Warning:** No changes are allowed when binding invoices apply. An invoice also cannot be reverted when binding invoices apply.

> **Note:** A Due invoice cannot be made undelivered when a due invoice already exists.

Troubleshooting

Symptom	Likely cause	Fix
The invoice does not progress through approval processing.	The invoice has not passed validation, or the applicable approval process has not been completed.	Correct the validation issues and complete the required approval processing before continuing.
You cannot change or revert the invoice status.	Binding invoices apply to the invoice.	Retain the current invoice status; changes and reversions are not permitted for binding invoices.
You are unsure whether to mark the invoice as paid.	The principal invoice or invoices may not be completely paid.	Confirm that the principal invoice or invoices are completely paid before selecting **Consider As Paid**.
You receive a warning when leaving the page.	The invoice contains unsaved changes.	Review the changes before leaving the Account Invoice page.

Result

The Account Invoice is reviewed and, when appropriate, progressed through approval processing or updated using the available payment-status actions.

Related pages

- Invoice
- Financial — Overview
- Financial — Learning Path
- Getting Started with Financial
- Bank Guarantees
- Payments
- Receivables
- Letters Of Guarantees
- Principal Invoices