

Smart Internal Billing Quick Guide

Smart Internal Billing (SIB) is an electronic invoicing tool that facilitates revenue collection from internal FIU customers. In the SIB process, departments act as either a customer or seller.

As a Customer, you will contact the appropriate department to purchase a good or service for your area. The Customer's (Receiving) Department Project Manager, Expense Manager, Director etc., will have the authority to approve the purchase of the good or service. The Selling (Billing) Department will provide the service or good and initiate the billing process. This department will have to define the items in the system prior to creating an invoice.

Security Roles

Expense Managers/Project Managers, whether their department is the Seller or the Customer, will have access to approve automatically as well as create smart bills. Other users can obtain access via the Access Request Form within PantherSoft Financials with approval by their HR Supervisors. Access is granted to the range of department numbers inputted on the Access Request Form.

Smart Billing - Bill Creator (017) – User is allowed to create/modify invoice.

Smart Billing - Item Creator (018) – User is allowed to create new items & update existing items.

DEFINING ITEMS

Items represent the good or service offered by the selling department for a fee. Items must be defined and approved prior to creating an invoice. This will be a unique item for every department.

Begin by navigating to: **Main Menu>Smart Solutions>Smart Documents>Smart Internal Billing> Define Items**

Enter the Billing Activity Number for which the item will be created in the Activity Number field, then click Add. This is the activity number that will be receiving money after the good or service is provided.

Continue defining the item with a **short description, long description, unit of measure, and price.**

Enter the **Billing Account**, the account of the seller in which money will be received or deposited. Then, add the **Customer Account**, the account of the customer in which the money will be paid from.

Click **Save** on the top left. After the item is saved, the system will assign it an **Item ID**.

Submit the item for approval  to the Office of Auxiliary and Enterprise Development. Approved items will change from
 1 Inactive to **Active** and be available for invoicing. .

CREATING AN INVOICE

After items are **Active**, a smart internal bill or invoice can be created. Creating the invoice is done through the Smart Internal Billing page. This page can be accessed through PantherSoft Financials by using the following navigation: **Main Menu > Smart Solutions > Smart Documents > Smart Internal Billing > Smart Internal Billing**.

Click the **Add a New Value Tab**. Enter the **Billing Activity** (the Activity Number that will collect the revenue or that is providing the good/ service) and the **Receiving Activity** (the activity number of the customer or receiving department/project that will pay for the provided good/service). Then click **Add**.

Enter the date the good/service was or will be performed/delivered in the **Date From** field. If the good/service is over a period of time, date can also be entered into the **Date To** field, but it is not required. Then enter any additional information into the **Description** field.

The image shows a 'Smart Internal Billing' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value', with the latter highlighted in red. Below the tabs are several input fields: 'Business Unit' (FIU01), 'Bill ID' (NEXT), 'Billing Activity' (1000130003), and 'Receiving Activity' (1104120006). The 'Billing Activity' and 'Receiving Activity' fields are highlighted with red boxes. At the bottom left, there is a green 'Add' button, also highlighted with a red box.

The image shows a 'Smart Internal Billing' form with a detailed header section. Fields include Business Unit (FIU0), Bill ID (NEXT), Entered by (TRNAM01,AMUSER), Bill Status (Open), WorkFlow Status (None), Entered On (06/29/20 1:27PM), Date From, Date To, Billing (1000130003 Football - Bowl Games), and Receiving (1104120006 Office of the Controller). Below this is an 'Item Details' section with a table. The table has columns for Item ID, Description, Quantity, UOM, Price, and Extended Amount. The first row shows Item ID '1' and a search icon. A red box highlights the search icon. At the bottom right, there is a blue 'Add' button.

The image shows a 'Smart Internal Billing' form with a detailed header section. Fields include Business Unit (FIU01), Bill ID (00007953), Bill Status (Open), WorkFlow Status (None), Date From (06/03/2020), Date To, Last Updated By (TRNAM01,AMUSER), and Last Updated On (06/29/20 1:27PM). Below this is an 'Item Details' section with a table. The table has columns for Item ID, Description, Quantity, UOM, Price, and Extended Amount. The first row shows Item ID '1' and a search icon. A red box highlights the search icon. At the bottom right, there is a blue 'Add' button.

In the **Item Details** section click the search glass next to the **Item ID** field. Only items already created for that billing activity number will appear. Select the intended Item ID.

After selecting an item, the associated information will populate within the item details section. Next, add the **Quantity** to be billed. Once the basic information for the smart bill is entered within the fields, click the **Save** icon at the top.

Attach any additional documents using the **Attach** icon. The final step is to submit the invoice to the Billing and Receiving Approvers with the **Submit** icon.

APPROVING

Employee Self Service Approval Inbox

Transaction Type: BillingApproval

Use Saved Search:

Bill ID equal to

Billing Activity equal to

Receiving Activity equal to

Business Unit equal to

Bill Status equal to

WorkFlow Status equal to

User ID equal to

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

NavBar

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- Smart Solutions
- Smart Workflow
- Transaction Approval
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- Central Transaction Search

In order to approve a Smart Bill invoice, both **Billing** and **Receiving Approvers** must navigate to: **Main Menu> Smart Solutions> Smart Workflow> Transaction Approval< Approval inbox.**

After clicking **Search** and clicking into the Smart Bill to review, approvers can click **Approve** or **Deny** icons. Refer to additional resources for approver workflow.

Smart Internal Billing Approve Transaction

Business Unit: FIU01 Bill ID: 000080090

Bill Status: Invoiced WorkFlow Status: Pending

Date From: 06/23/2020 Date To:

Last Updated By: Last Updated On: 06/23/20 12:43:2

Additional Resources

Smart Internal Billing Manual – <http://finance.fiu.edu/controller/Docs/SmartBillingManual.pdf>

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