Manually Creating an Application Invoice

This guide will cover:

- Creating an application invoice. (Note: For the purpose of this document, it’s assumed that an application submission did not create an invoice automatically.)
- Editing an already created invoice.

Step One

To add an application invoice, use the global search to locate the contact record of the applicant.

**REMEMBER:** You can search for a contact by using one of the following fields:

- Email (recommended)
- First and last name
- Date of birth
- Mobile number
- Contact street

**TIP:** Adding an asterisk to the end of a value in the search bar can expand your search if you are unsure of what name a student may have in the system. For example, searching for Matt* will find all records that contain the word “Matt,” including Matthew or Matthews.

Step Two

Once you have located the contact record of the applicant, click **Action** then **View** to access their contact record.

If necessary, add the Applications related information tab. Click the Related Information drop-down then select Applications.
Step Three

Select the application related to the invoice. When creating a new invoice, the application status should display as “Applied – Fee Not Paid.”

Step Four

Click the **Action** button then click **Add/Edit Invoice**.

Step Five

Depending on the application and associated iteration, key fields will auto populate with specific application data in the Invoice and Payment information sections. Update information as necessary:

- **Invoice Owner**: Leave as defaulted user creating the invoice.
- **Program Name**: Leave as the defaulted program.
- **Iteration Name**: Leave as the defaulted iteration name (used to determine the application rate).
- **Application**: Leave as the contact’s name that is associated with this application.
- **Due Date**: Use today’s date.
- **Payment Method**: For the purpose of this document, leave this field blank.

**IMPORTANT**: For how to apply a fee payment and waiver. Refer to the work instructions, Logging a Payment in Radius & Logging a Fee Waiver in Radius.
**Step Six**

The rate will prepopulate with the correct rate based on the iteration. Click **Save**.