

Business Process Procedures

10.20 CANCELLING AN INVOICE

Overview These procedures are intended to serve as a quick overview of how to cancel an invoice.

Key Points Prior to using this document, make sure the Billing Request has been completed and processed. See 10.05 Invoicing for details.

Detailed Directions

Step 1 Navigate to the Billing Cancellation page.

[Student Financials](#)>[Bill Customers](#)>[Cancel Invoice](#)

Step 2 The Billing Cancellation dialog window appears.

Step 3 **PREVIOUS USERS:**

Type in the Run Control ID you previously created to or click  to lookup.

FIRST-TIME USERS:

❖ Click .

❖ Enter a name for the run control to be used to run the Bill Cancellation process.

❖ Click .

Step 4

The Bill Cancellation page appears.

- ❖ Enter **NV280** as the Business Unit, or click  to lookup.
- ❖ In the Run Option field, choose the **Invoice ID** option and enter the invoice number in the Invoice Number field, or choose the **Billing Request Number** option and enter the appropriate number in the Billing Request Nbr field.
- ❖ Generally, the operator will chose to cancel an invoice for all students contained on the invoice. If that is the case, leave the ID field blank.
- ❖ Enter the **External Org ID** in the External Org ID field, or click  to lookup.\
- ❖ Chose Log All Activity for the Bill Cancellation Log Option.

Step 5

Click .

Step 6

Click  to run the Billing Cancellation process.

Step 7

Verify the following on the Process Scheduler Request page:

1. The Server Name is **PSUNX**
2. The Select checkbox is checked for **Billing Cancellation**
3. The Type is **None**
4. The Format is **None**

Click  to run the process.

Step 8

Refresh the process monitor so as to see when the process ended successfully. (Refer to 14.20 Running Processes and Reports for more detailed directions.)

Step 9

When the process finishes successfully, check the status of the invoice by navigating to [Student Financials>Bill Customers>Corporate Bills>Review Invoice Cancellation](#)

Step 10 The Bill Cancellation page appears.

Bill Cancellation
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value _____

Business Unit:

Billing Cancellation Number:

[Basic Search](#)

- ❖ Enter **NV280** as the Business Unit, or click  to lookup.
- ❖ Click to lookup the Billing Cancellation Number.

Step 11 The display order for the search results will default to Invoice Number. Click on [Billing Cancellation Number](#) to reorder the results so that the most current Billing Cancellation Number appears as the top of the list.

Step 12 Confirm that the invoice number for the most recent Billing Cancellation Number is the one you just cancelled. If it is, click on the link for either the Billing Cancellation Number or for the Invoice Number.

Step 13 The Bill Cancellation page appears.

Bill Cancellation

Business Unit: NV280 Northern Virginia Comm College Billing Cancellation Number: 4500003669

User ID: 4092172 Billing Request Nbr:

Find | View All First Last

Invoice Number: 0000000325SP08NV280_XO

ID:

External Org ID: 80000010226 Department of Veterans Affairs

Billing Cancellation Status: Cancelled Successfully

Message:

Step 14 Confirm that the Billing Cancellation Status shows Cancelled Successfully. Report any problems to CIS/NCSS.