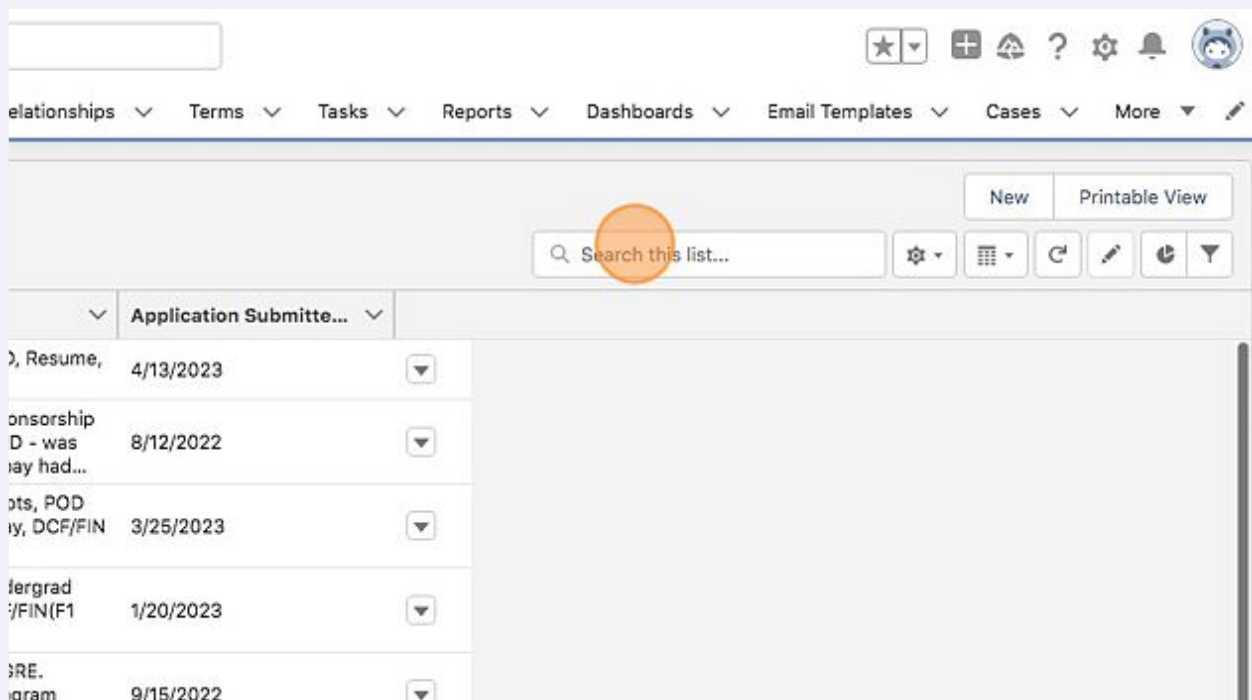


How to Create an Invoice

1 Navigate to fiucrm.lightning.force.com/lightning/o/Opportun...

2 Click the "Search this list..." field and search for the applicant opportunity you are looking to invoice.



The screenshot displays the Salesforce Lightning interface. At the top, there is a navigation bar with various menu items: relationships, Terms, Tasks, Reports, Dashboards, Email Templates, Cases, and More. Below this, there are buttons for 'New' and 'Printable View'. A search bar labeled 'Search this list...' is highlighted with an orange circle. Below the search bar, there is a table with the following data:

Application Submitter	Date	Action
Resume, Resume, Resume	4/13/2023	▼
Sponsorship D - was may had...	8/12/2022	▼
pts, POD by, DCF/FIN	3/25/2023	▼
fergrad ;/FIN(F1	1/20/2023	▼
RE. gram	9/15/2022	▼

3 Click the Opportunity Name of the applicant.

Chapman Graduate... Home Contacts Opportunities Campaigns Interactions Plans

Opportunities
MSF Fall 2023 - Applicants

3 items • Sorted by Opportunity Name • Filtered by All opportunities - Academic Interest, Term • Updated a few seconds ago

	Opportunity Name ↑	Account Na...	Stage	Converted GPA	Notes
1	Gonzalez - Fall Term 2023	Matthew Gonzal...	Incomplete	2.8500	Missing: Transcri POR
2	Gonzalez - Fall Term 2023	Natalie Gonzale...	Admitted	3.6660	4/18 - Recomm 3/25 -Pending S residency GMAT
3	Gonzalez Rodriguez - Fall Te...	David Gonzalez ...	Incomplete	3.8800	Missing: Transcri POR

4 Once in the applicant opportunity view, click "New Invoice"

relationships Terms Tasks Reports Dashboards Email Templates Cases More

+ Follow New Interaction Create Case **New Invoice**

Admitted Confirmed Closed ✓ Mark Stage as Complete Edit

Related List Quick Links

- Cases (8)
- Interactions (3)
- Contact Roles (1)
- Opportunity Field History (10+)

5

If this is a new invoice for an applicant with no prior payment or payment deferral, click "Notify Customer." Clicking "Notify Customer" will send the email notification/invitation letter to the applicant to pay their invoice once the invoice is created and saved.

The screenshot shows a 'New' invoice creation form. On the left, a sidebar displays the student's details: Opportunity 'Gonzalez - Fall Term 2023', Term 'Fall Term 2023', Academic Interest 'Finance - MSF', Panther ID '3324932', Application Status 'APPL', and Application Number '1231483'. The main form area contains the following fields: a confirmation message 'You are about to create an open invoice for Gonzalez - Fall Term 2023.', student information (Name: Natalie Gonzalez, Panther ID: 3324932, Academic Interest: Finance - MSF, Academic Term: Fall Term 2023), a 'Notify Customer' checkbox (highlighted with an orange circle), an '*Invoice Item' section with a search box, a 'Due Date' field, a 'Status' dropdown menu set to 'Open', and a 'Discount Percentage' field set to '0.00'.

6

Click the "*Invoice Item" field.

This screenshot is similar to the previous one, but the 'Notify Customer' checkbox is now checked. The '*Invoice Item' field, which includes a search box labeled 'Search Invoice Items...', is highlighted with an orange circle. The rest of the form, including the student information and other fields, remains the same.

7 Click "Admissions Deposit" that is tied directly to your program.

The screenshot shows a student record page with a left sidebar and a main content area. The sidebar has tabs for 'Chatter' and 'Details', with 'Details' selected. The main content area displays student information: Student's Name: Natalie Gonzalez, Panther ID: 3324932, Academic Interest: Finance - MSF, and Academic Term: Fall Term 2023. There is a checked checkbox for 'Notify Customer'. Under the 'Invoice Item' section, there is a search bar and a list of 'Recent Invoice Items'. The first item, 'MSF Admissions Deposit 200 Admissions Deposit', is highlighted with an orange circle. Below this list is a 'Description' field.

Student's Name: Natalie Gonzalez
Panther ID: 3324932
Academic Interest: Finance - MSF
Academic Term: Fall Term 2023

Notify Customer

* Invoice Item

Search Invoice Items...

Recent Invoice Items

- MSF Admissions Deposit 200 Admissions Deposit
- MSHRM In-Person Acceptance Admissions Deposit
- OMSHRM Admissions Deposit 200 Admissions Deposit
- MSIRE Admissions Deposit 200 Admissions Deposit
- Admissions Deposit 200 Admissions Deposit

Description

8 Click "Due Date"

The screenshot shows the same student record page, but now the 'MSF Admissions Deposit 200' record is selected and expanded. The 'Due Date' field is highlighted with an orange circle. Other fields include 'Status' (Open), 'Discount Percentage' (0.00), and 'Waiver Reason' (--None--). The 'Description' field is empty.

Student's Name: Natalie Gonzalez
Panther ID: 3324932
Academic Interest: Finance - MSF
Academic Term: Fall Term 2023

Notify Customer

* Invoice Item

MSF Admissions Deposit 200

Due Date

Status

Open

Discount Percentage

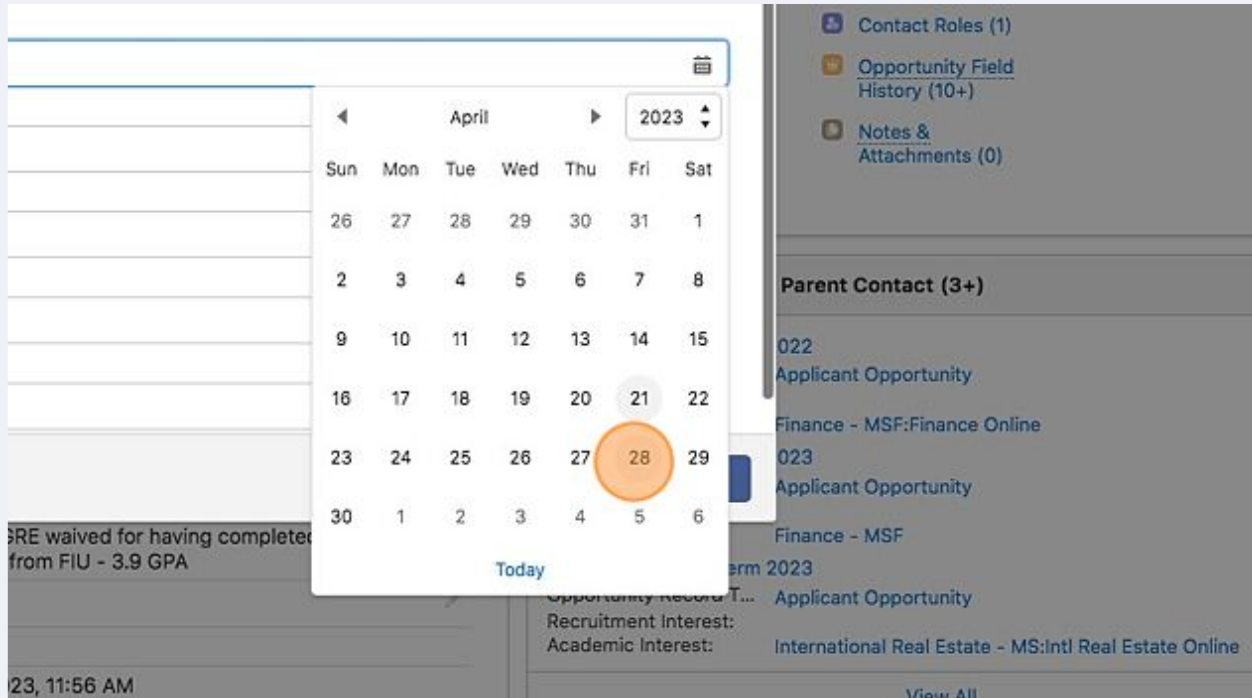
0.00

Waiver Reason

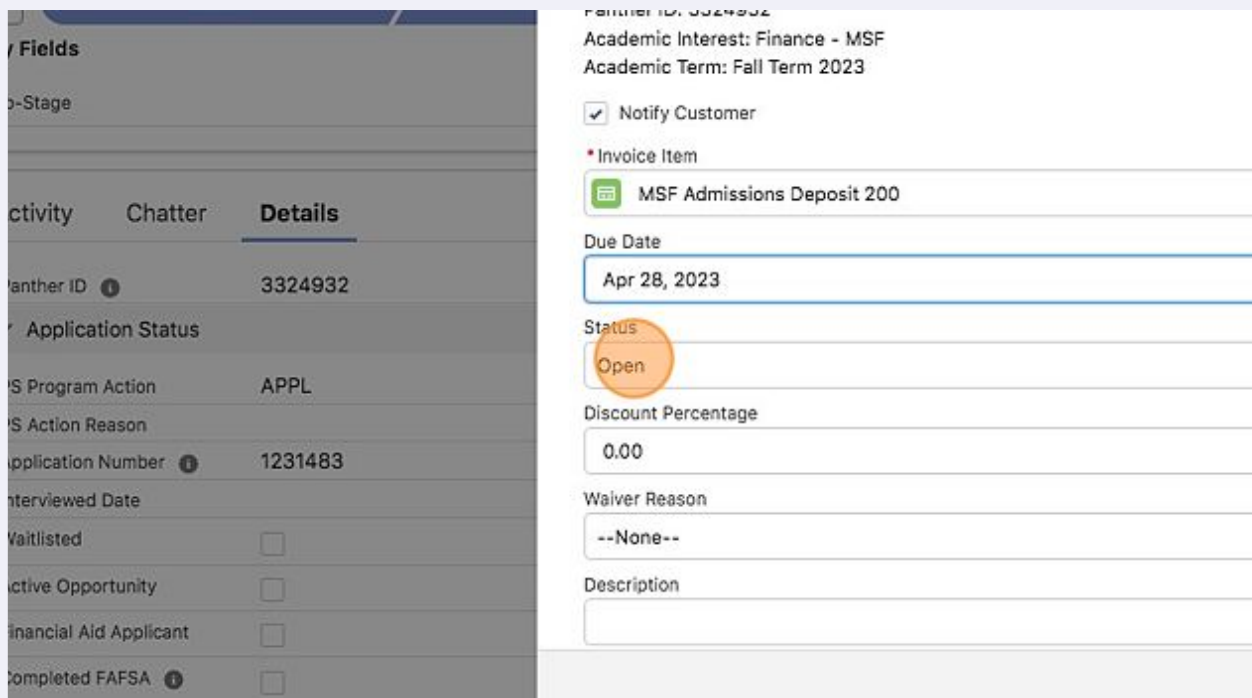
--None--

Description

9 Enter the due date for the invoice payment

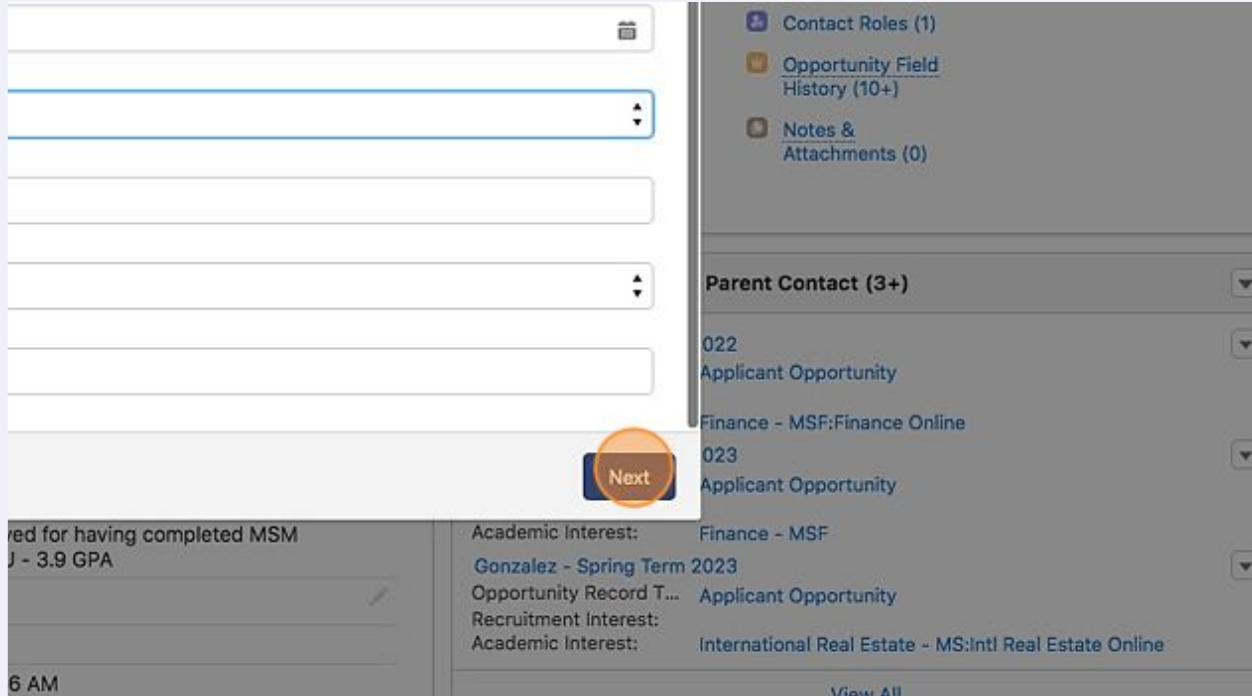


10 Ensure that the invoice is Open.



11

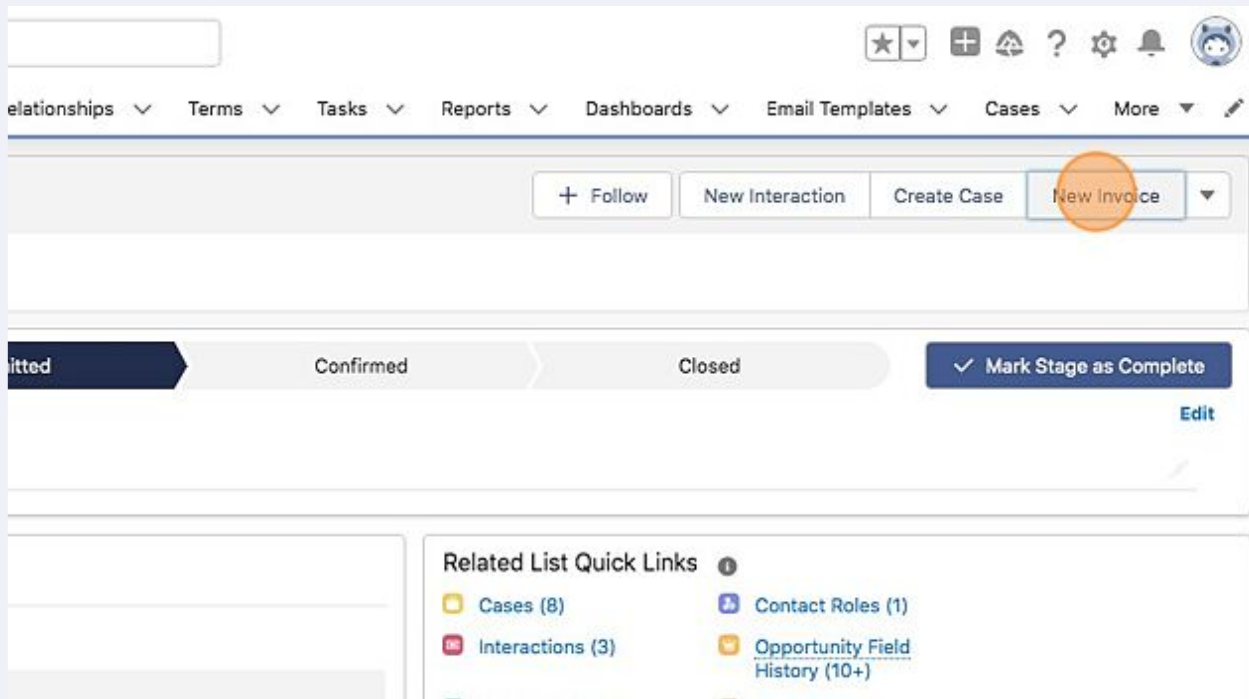
Click "Next" - this will create the invoice and send the applicant their invitation letter to pay their invoice.



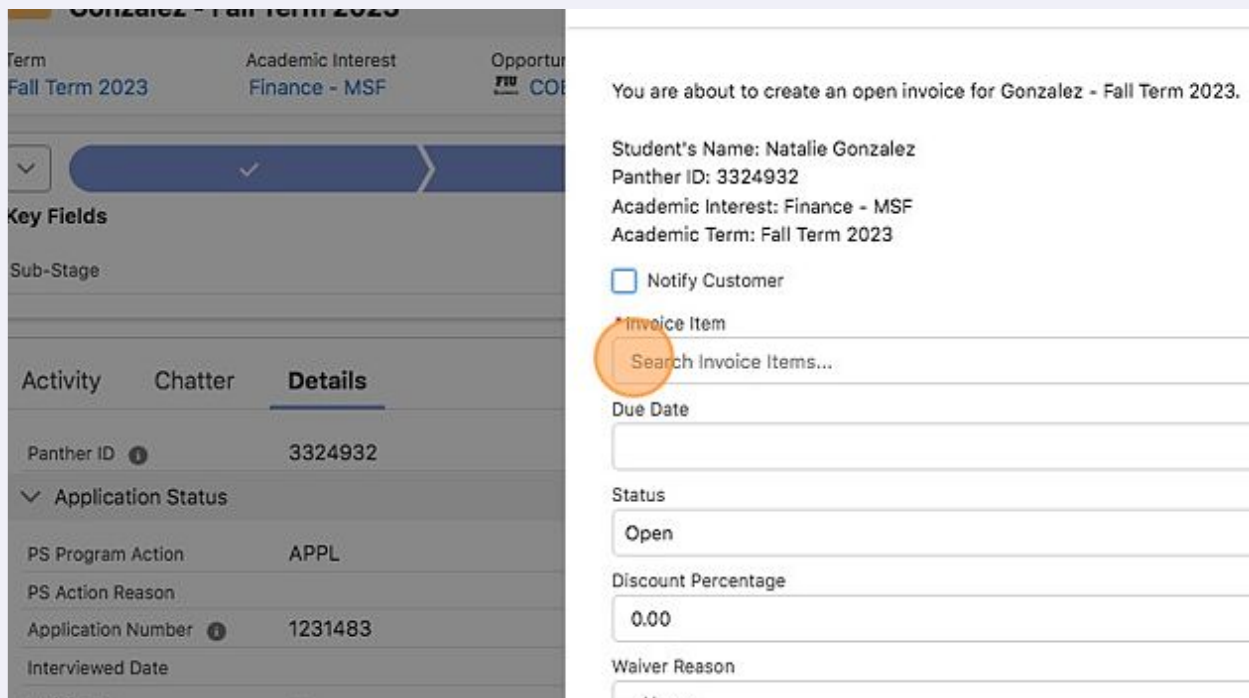
12

Below are the following steps on how to create and close an invoice for an applicant whose payment is deferred or waived.

13 Click "New Invoice"



14 DO NOT click Notify Customer. Click the "*Invoice Item" field.



15 Click "Admissions Deposit" that is tied directly to your program.

The screenshot shows a student profile page with a left sidebar and a main content area. The sidebar has tabs for 'Chatter' and 'Details', with 'Details' selected. The main content area displays student information: Student's Name: Natalie Gonzalez, Panther ID: 3324932, Academic Interest: Finance - MSF, and Academic Term: Fall Term 2023. There is a checkbox for 'Notify Customer' which is unchecked. Below this is a section for 'Invoice Item' with a search bar and a list of 'Recent Invoice Items'. The first item, 'MSF Admissions Deposit 200 Admissions Deposit', is highlighted with an orange circle. Below the list is a 'Description' field.

16 Leave due date blank and click the 'Status' dropdown. Click 'Closed'

The screenshot shows the 'MSF Admissions Deposit 200' form. The left sidebar is partially visible with the 'Details' tab selected. The main content area shows the form fields: Academic Interest: Finance - MSF, Academic Term: Fall Term 2023, and a checkbox for 'Notify Customer' which is unchecked. The 'Invoice Item' section shows 'MSF Admissions Deposit 200'. The 'Due Date' field is empty. The 'Status' dropdown menu is open, showing 'Open' selected, with an orange circle highlighting it. Below this are fields for 'Discount Percentage' (0.00), 'Waiver Reason' (--None--), and a 'Description' field.

17 Click on the discount percentage and type in 100. This will zero out the invoice

Activity Chatter **Details**

Author ID ⓘ 3324932

Application Status

MS Program Action APPL

MS Action Reason

Application Number ⓘ 1231483

Interviewed Date

Waitlisted

Active Opportunity

Financial Aid Applicant

Completed FAFSA ⓘ

Notify Customer

* Invoice Item

MSF Admissions Deposit 200

Due Date

Status

Closed

Discount Percentage

0.00

Waiver Reason

--None--

Description

GMAT/GRE waiver degree from FIU

18 Click the 'Waiver Reason' and choose the reason that pertains to the applicant. Ensure to use the description box, if applicable, to detail term invoice is being transferred from.

Activity Chatter **Details**

Author ID ⓘ 3324932

Application Status

MS Program Action APPL

MS Action Reason

Application Number ⓘ 1231483

Interviewed Date

Waitlisted

Active Opportunity

Financial Aid Applicant

Completed FAFSA ⓘ

MSF Admissions Deposit 200

Due Date

Status

Closed

Discount Percentage

100

Waiver Reason

--None--

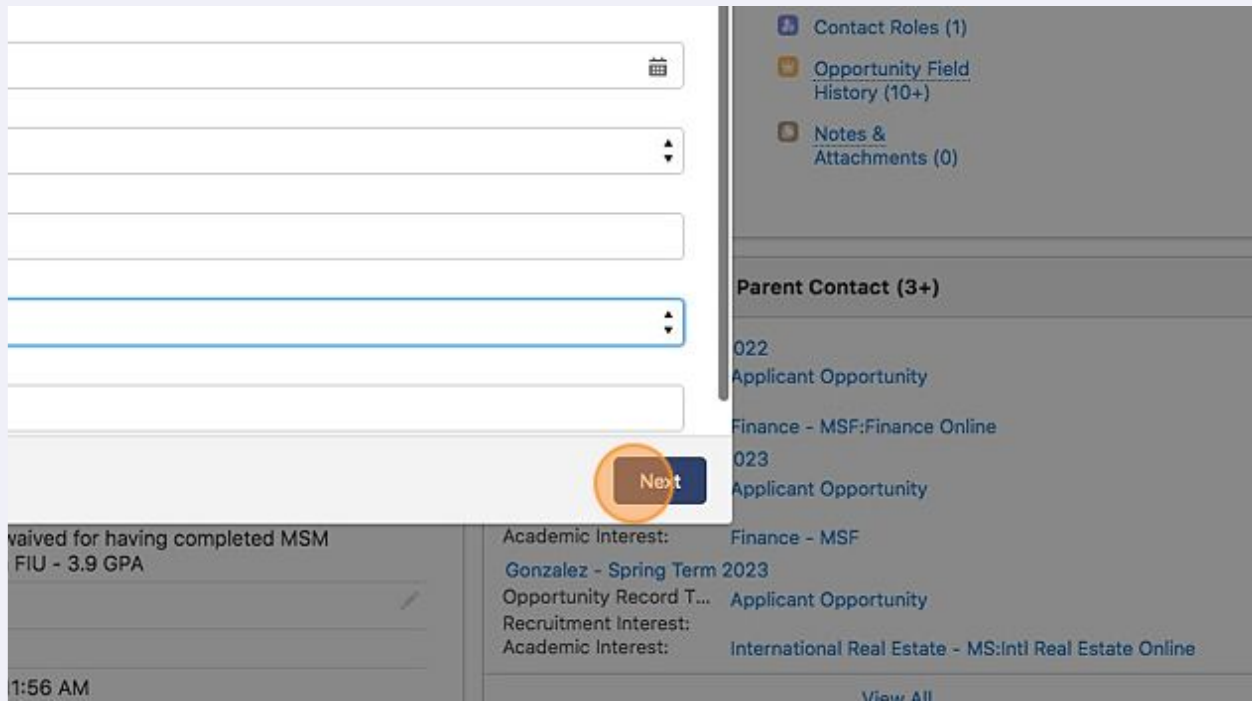
Description

GMAT/GRE waiver degree from FIU

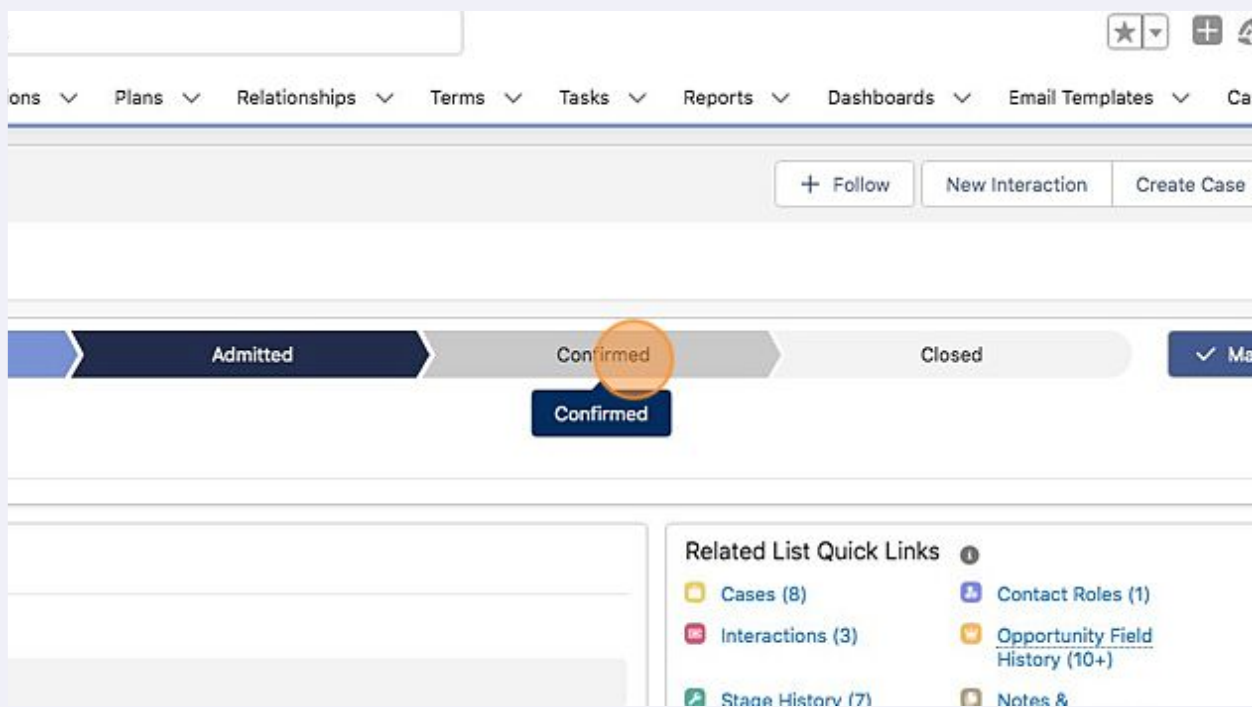
Override Assignment

Number of Opportunities 5

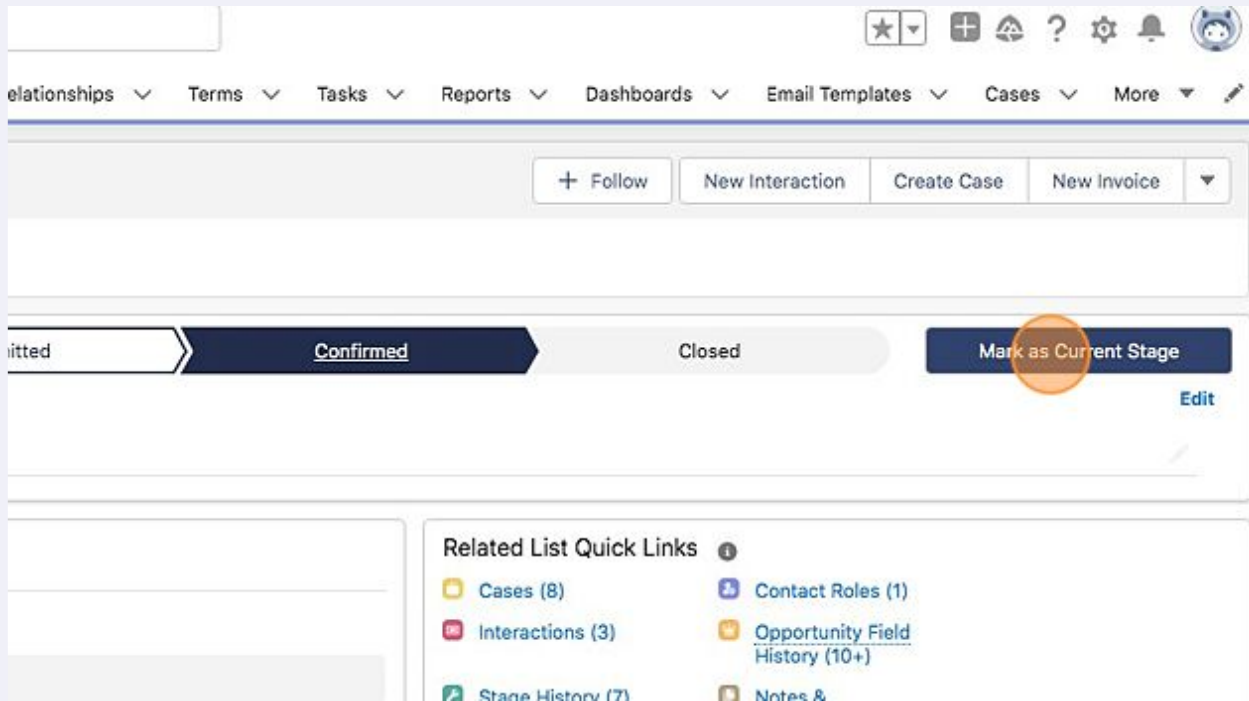
19 Click "Next"



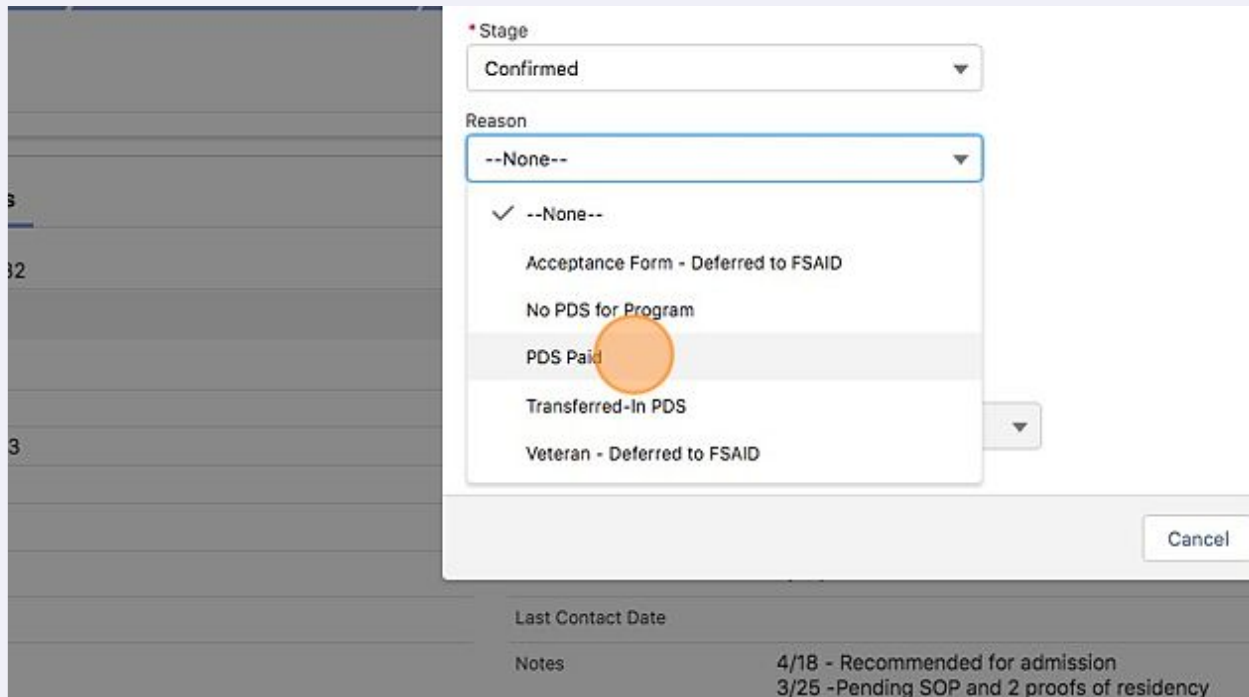
20 Make sure that once an invoice is closed - whether it be manually by the recruiter or paid by the applicant - recruiter must manually update the applicant stage to "Confirmed"



21 Click "Mark as Current Stage"



22 Click the reason most applicable.



23 Click "Done"

The screenshot shows a CRM interface with a modal form in the foreground. The modal has several dropdown menus and a 'Done' button highlighted with an orange circle. In the background, there is a list of 'Opportunities for Parent Contact (3+)' with details for Gonzalez - Spring Term 2022 and 2023. The modal also contains text: '4/18 - Recommended for admission', '3/25 -Pending SOP and 2 proofs of residency', and 'GMAT/GRE waived for having completed MSM degree from FIU - 3.9 GPA'. A 'Cancel' button is also visible in the modal.