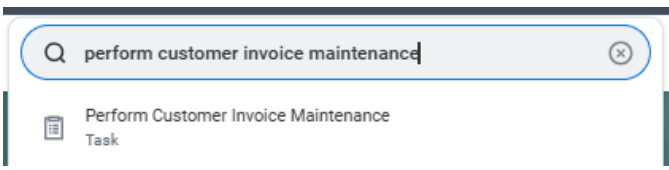


Customer Accounts/Revenue: Perform Customer Invoice Maintenance

Audience / Role	Customer Billing Specialist Kern County Customer Specialist
Description	This job aid provides instructions to perform customer invoice maintenance.

Perform Customer Invoice Maintenance

1	In the Search bar, enter Perform Customer Invoice Maintenance. In the search results, select the Perform Customer Invoice Maintenance task. 
2	Under Perform Customer Invoice Maintenance, enter the following into the fields: • Company – Select name of company. • Bill to Customer – Select the customer. • Currency – Enter USD. Enter additional search criteria as needed to refine your search results. Select OK.
3	For Perform Customer Invoice Maintenance, under Customer Information, enter the Transaction Date – select the date of the transaction. Under Customer Invoices to Maintain, select the invoice/s to adjust by selecting the checkbox to Perform write-off and/or apply available adjustments.
4	To apply available invoice adjustments to the Invoice, navigate to the Invoice Adjustments field and select to open the adjustments application page.
5	In the applications page, select the available adjustments from the Dropdown. Update the adjustment information if necessary. Select Done. <u>Do not enter in a write-off amount as they are not allowed.</u>
6	Select Submit.



Customer Accounts/Revenue: Perform Customer Invoice Maintenance

What Next?

Happens

- The customer invoice maintenance routes for review and approval.
- Invoice Adjustment can be seen on original invoice in header as well as Activity tab once approved.

Related Reports

- Find Customer Invoices for Company
- Find Customers with Facet Search

Related Job Aids

- Create and Maintain Customers