Quick Invoice Entry

To enter vouchers in SWIFT for large volumes of invoices, use the Quick Invoice page. Quick Invoice Entry includes Minimal Data Entry, the ability to Copy Purchase Order data, and the Voucher Build Process. Quick Invoice Entry includes two worksheets: Simple Worksheet and Complete Worksheet. Use the Simple Worksheet to create vouchers without purchase orders and the Complete Worksheet to create vouchers with purchase orders. Vouchers will be created during batch processing.

Steps to complete

- **Step 1:** Create a new voucher.
- **Step 2:** Enter information on the *Quick Invoice* page.

### Step 1: Create a new voucher.

1. **Navigate to the Quick Invoice Entry page.**

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Collection</td>
<td>Accounting, Accounts Payable, Vouchers, left-menu, Add/Update folder, Quick Invoice Entry.</td>
</tr>
</tbody>
</table>

2. **On the Add a New Value tab,** enter the agency number in the *Business Unit* field.

3. **In the Voucher ID field,** leave “NEXT” as the default value.

4. **In the Quick Invoice Template field,** select “Simple Worksheet” or “Complete Worksheet” to create a Quick Invoice Entry.
   - Use the Simple Worksheet to create Quick Invoice Entry Vouchers with no PO data.
   - Use the Complete Worksheet to create Quick Invoice Entry Vouchers by copying PO data.

5. **Press the Add button.**
Note: The Estimated No of Invoice Lines field will populate with “4” as the default value. Change this value, if necessary.
Step 2: Enter information on the *Quick Invoice* page.

1. The *Quick Invoice* page will display. Enter the invoice number in the *Invoice Number* field.
2. Enter the invoice date in the *Invoice Date* field.
3. Enter the accounting date in the *Accounting Date* field.
4. Enter the supplier number in the *Supplier* field.

5. Enter the appropriate information in the *Invoice Lines* section.
   - If using the Simple Worksheet, continue to #6 – 7, and skip #8 – 12.
   - If using the Complete Worksheet, skip #6 – 7, and continue at #8.
For Simple Worksheet

6. If using the Simple Worksheet, enter invoice information in the following fields below the Invoice Lines section: Amount, Description, Fund, Fin DeptID, Appropriation ID, Account, etc.

7. Press the Save button. Then skip to #13.

For Complete Worksheet

8. If using the Complete Worksheet, find the Copy From Source Document section, and enter the agency number in the PO Unit field.

9. Enter the Purchase Order number in the PO Number field.

10. Press the Copy PO button.

11. The Copy Worksheet screen will display. Press the Search button to search for PO lines.
12. The **Select PO Lines** section will expand to display search results. On the **Main Information** tab, check mark the PO line to copy, and press the **Copy Selected Lines** button.

SWIFT will copy the PO line into fields below the **Invoice Lines** section.

13. Below the **Invoice Lines** section, remove any extra lines by pressing the **Delete Row (-)** icon.

(Or press the **Add New Multiple Rows (+)** icon to add additional lines.)

14. Press the **Save** button.
15. The Quick Invoice page will generate a voucher number in the Voucher field. In the Build Status field, select “Build Voucher” from the drop-down list, and press the Save button again.