MUNIS – GB Invoice Creation, Posting & Printing

Cheat Sheet

To create a General Billing Invoice

1. Open the Tyler Menu, then…
   a. **General Revenues**.
   b. **General Billing**
   c. **Invoice Processing**.
   d. **Invoice Entry and Proof**.
2. Click on **Add Batch** in the MUNIS ribbon.
   a. Note the **Batch** number
   b. Click **Accept** in the MUNIS Ribbon.
   c. Click the 3-dot button next to **Customer.**
   d. Input search criteria, and click on **Accept** in the MUNIS ribbon. **(type * for all customers)**
   e. Find Customer, highlight and click on **Accept** in the MUNIS ribbon.
   f. Click Accept on the MUNIS Ribbon.
3. Tab to **AR Code** and left-click on the down arrow to select proper Departmental General charge code.
4. Tab to **Invoice**, and left click on the "+1" sign to create the invoice number.
5. Complete any other info required and then click on **Accept** in the MUNIS Ribbon.
6. In **Charge Code**, click on the down arrow to select the proper Billing Charge Code.
7. Tab to **Description** and adjust if needed.
8. Tab to **Quantity** and adjust if needed.
9. Tab to **Price** and adjust if needed.
10. Complete any other info required and then click on **Accept** in the MUNIS Ribbon.
11. If another charge-line is needed for THIS customer, click **Add** in the MUNIS Ribbon; otherwise…
12. …click **Return** in the MUNIS Ribbon to return to the Proof header.
13. If another Invoice needed for another customer, click **Add** in the MUNIS Ribbon; otherwise…
14. …click **Return** in the MUNIS Ribbon to return to the Batch Header.

To Post a General Billing Invoice

1. Open the Tyler Menu, then…
   a. **General Revenues**.
   b. **General Billing**
   c. **Invoice Processing**.
   d. **Invoice Entry and Proof**.
2. Click on **Browse** in the MUNIS Ribbon.
3. Find your Batch(es) to print, highlight and **Accept** in the MUNIS Ribbon.
4. Select **Output Post** in the MUNIS ribbon.
5. Select correct printing options. **(PDF or Display)**
6. Select the **OK** on the bottom.
7. Select "Yes" to update files

To Print a General Billing Invoice

1. Open the Tyler Menu, then…
   a. **General Revenues**.
   b. **General Billing**
   c. **Invoice Processing**.
   d. **Print Invoices**.
2. Click on **Define** in the MUNIS ribbon.
   a. Tab to AR Code Range. **(Be sure on run type that Print is selected)**
   b. Select your Departmental AR Charge Code.
3. Select proper Date and/or Batch range for printing.
4. Complete any other info needed and select **Accept** in the MUNIS Ribbon.
5. Click on **Select** in the MUNIS ribbon.
   a. Scroll to the bottom and verify the amount of Invoices selected.
6. Select **Print** in the MUNIS Ribbon.
7. Always select Tyler Forms DO in Output Type Section
8. In Forms Option select Print General Invoices
9. Select Print to Local Printer if enabled. **(Call IT to enable if not.)**