Request a Bill and Update a Customer

Introduction

A customer bill* must be created for all transactions involving the sales of good or services by the University. All University bills are raised by the Revenue Accounting Team. Each customer must have their own account in PeopleSoft through which their bill will be processed. The Billing Request eForm is used to request the raising of a bill and to add or update customer details in PeopleSoft.

***Definitions of a bill and invoice**

- A bill is raised by the University to collect money owing from a customer i.e. they pay us
- An invoice is submitted to the University by a 3rd party to collect money owed i.e. we pay them

Procedure

The Billing Request eForm can be accessed on the Finance & Procurement Website navigate to Documents, Forms & Policies > Forms> Revenue Accounting & Online Shop > Billing Request eForm

The following requirements need to be considered when completing the Billing Request eForm:

- For billing requests where collections procedures are not to be followed (e.g. some donations and scholarships) the Collections Procedures section needs to be completed. Please note that only Faculty Finance and Planning Managers, Division Management Accountants and Executive Deans/Division Heads have authority to veto a reminder or demand letter. As such, approval will need to be sought, and the section on the form completed.

- It is important to note that billing requests for donations to the University can only be requested by the External Relations Branch. If you have received or expect to receive a payment relating to a donation, scholarship or prize, please contact the External Relations Branch before submitting your request.

Supporting documentation must be provided with each request.
Examples of supporting documentation are below.

General Billing Requests

Expense Reimbursement, courses, conferences, sponsorship, contribution or any other sale of goods or services:

- Customer confirmation such as letter, email or written agreement for invoice to be initiated. The correspondence confirms customer details including email address, the total amount and GST treatment
- Signed course registration form
- Conference letter or invitation
- Purchase Order supplied by the customer
- Signed Agreement
- Recurring invoices – provide scheduling dates (if not in the agreement)

Research Services (Research Grants, Contracts and Consultancies)

Research Grants

- Signed Agreement between Sponsor and The University of Adelaide
- Purchase Order Reference where applicable

Contracts and Consultancies

- Service agreements relating to Contract Research or Consultancy – for invoicing guidelines refer https://www.adelaide.edu.au/research-services/industry/ or contact rbp@adelaide.edu.au
- Purchase Order or Approval reference numbers

New or Update customer (supporting documents required)

- Customer correct address details (displayed on letter, email or written communication)
- Department/School/Area (if applicable)
- Confirmation of ABN number
- Email address of recipient of invoice

Related policies

- http://www.adelaide.edu.au/policies/3823/?dsn=policy.document;field=data;id=6745;m=view – Invoicing & Cash Receipting Procedures

  https://www.adelaide.edu.au/policies/56/ - Giving policy
- https://www.adelaide.edu.au/policies/122/ - Research Grants, Contracts and Consultancies

Need help?

For further support or questions, contact Finance & Procurement Services on +61 8 8313 3414 or finprosupport@adelaide.edu.au